



# 2025

# NFA

NASHVILLE FASHION ALLIANCE



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since 1929



January 2016

The NFA's mission is to amplify early-stage fashion companies of all kinds.

From designer-led startups to emerging brands demonstrating traction and readiness to scale, we are dedicated to creating the support network for fashion companies to grow, thrive, and become solid employers. We believe our region belongs on the fashion map, and we are here to help make it happen.

That's why we're thrilled and honored to deliver this report. It shows that the potential we've spotted is real, and it's big—\$9.5B in revenues and employment of 25,000 people projected by the year 2025. Since the beginning of the Nashville Fashion Alliance, a formal economic impact study of our area's fashion industry has been at the top of our priority list. Here it is. And it includes recommendations on how we will get there.

It takes an ecosystem. While the fashion brands themselves are the stars, they need a support network of education and mentorship, suppliers and production, skilled workers, finance, distribution and marketing. In turn, growth in fashion will bring growth in many other functions.

Why do we believe in Nashville?

We've known anecdotally that the pool of creative talent in our local fashion industry is phenomenal, attracted by our uniquely collaborative creative culture and our cost and quality of living. But we've lacked the numbers to prove that the fashion business is rapidly growing into a significant economic driver in the region.

We have them now. With relatively little nurturing, our region has the greatest per capita concentration of independent fashion companies outside of New York City and Los Angeles. As an industry, fashion is already generating an economic impact of \$5.9 billion and employing upwards of 16,200 people here. The growth over the last five years has been impressive.

With that kind of momentum, just imagine how it would look with the right resources, infrastructure, and public-private partnerships. That's what we propose: let's invest in this industry together and help it reach its full potential. We believe the fashion business will generate exponential growth and become a major economic driver for the region. The energy is already here.

The report shows that one of our greatest advantages is that we are organized and united as an industry: “With the establishment of the NFA, the industry has chosen to consolidate its efforts and to pool its resources to grow... one of the key success factors for fashion clusters around the world.” Your engagement in the NFA is a key indicator for our future success.

Another of the region’s key advantages is that we’re starting with a relatively clean sheet of paper. The global fashion industry is a constant innovator, so there’s no need to re-create the fashion business of the past. Consumers demand environmental and social responsibility, responsiveness, and a more direct relationship with brands. We intend to equip our NFA members to lead and create lasting value in this climate.

This vision takes funding—for a resource center that can offer affordable studio/office space; access to resources and information; shared equipment and small batch manufacturing; skilled workforce development; and a robust business accelerator program that includes knowledgeable mentors and access to capital for emerging fashion businesses.

We are incredibly grateful to our underwriters, Bayer e3 Sustainable Cotton, Tennessee Valley Authority, and the Nashville Convention & Visitors Corp. So many contributed to the sourcing and compilation of data for this report, including Clara Kim, the Nashville Mayor’s Office of Economic Development, and the State of Tennessee Department of Economic Development. And of course we are grateful for the hard work of the experts at globally-respected Gherzi International, the industry analysts who prepared this report.

We’re excited for the journey ahead. We look forward to engaging the community, gathering more people to take part in this movement, and together realizing the vision to benefit the region by putting Nashville on the map for the fashion business.

Respectfully,



Van Tucker  
CEO



521 Gallatin Ave, Suite 10  
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FOR IMMEDIATE RELEASE:

**Nashville Fashion Alliance Releases Economic Impact Survey**  
Area Fashion Businesses Projected to Contribute \$9.5 Billion & 25,000 Jobs by 2025

NASHVILLE, TN, Jan. 25, 2017 -- The Nashville Fashion Alliance (NFA) released an economic impact study today, outlining the current scale and projected growth of the fashion industry in the Nashville area. According to the report, Nashville is poised to become a key player in the national fashion industry.

The analysis shows the projected economic impact of NFA constituents could reach \$9.5 billion and 25,000 jobs by 2025. Fashion businesses currently contribute \$5.9 billion and 16,200 jobs to the area economy (direct and induced impact).

Long known for its strong music and healthcare industries, Nashville now boasts the largest per capita concentration of fashion companies outside of Los Angeles and New York City (Bureau of Labor Statistics). High quality products and innovative business models have recently produced unprecedented growth in this category, with the number of fashion brands in Nashville doubling over the last five years.

NFA CEO Van Tucker says the report confirms the potential that exists in the Nashville area to support a growing fashion ecosystem. "From designer-led startups to emerging brands demonstrating traction and readiness to scale, the NFA is dedicated to creating the support network for fashion companies to grow, thrive, and become solid employers," she says. "We believe our region belongs on the fashion map, and we are here to help make it happen."

The new report was produced by the NFA in partnership with Gherzi Textil Organisation, a Zurich-based international leader for strategic development and expansion of companies in the textile, apparel and fashion industries. Underwriting for the report was generously provided by Bayer e3 Sustainable Cotton and Tennessee Valley Authority. Highlights of the study were shared at a press event attended by members of local government, civic and community leaders, and NFA members.

"Nashville enjoys a number of the key success factors needed to become a regional fashion player," says Karim Shafei, International Partner at Gherzi. "The sector has experienced phenomenal growth over the past five years and has the potential to double in the coming eight to ten years to reach over nine billion dollars in total economic impact."

Gherzi began by conducting a survey of the NFA's members in order to measure the current economic footprint of the industry represented by the NFA members in Nashville. This established a baseline that can be used in the future to gauge the impact of the NFA intervention on the industry. From there, Gherzi widened its analysis, examining first the economic ecosystem and impact of the fashion and retail industries in Nashville and Middle Tennessee; they then widened their scope to look at the state of Tennessee as a whole. Finally, Gherzi analyzed the national and global industry to examine trends shaping the fashion industry, as well as the lessons learned from initiatives similar to the NFA.

The NFA is comprised of over 368 members, including approximately 132 fashion brands. Established in 2013, the NFA's mission is to build the regional fashion industry by amplifying early-stage fashion businesses with an ecosystem of support and resources. The group is governed by a Board of Directors comprised of Nashville fashion industry players from the worlds of business and art, who collaborate on the best ways to move the region forward in the global fashion space.

With resources, infrastructure, and public-private partnerships, the NFA is helping to generate exponential growth in its region to build the fashion industry as a major economic driver. The organization is committed to supporting this growth with plans to develop a resource center in the Nashville area that delivers a seamless package of initiatives for young fashion businesses, including a comprehensive accelerator program.

## ABOUT THE NFA

The Nashville Fashion Alliance is a trade organization with a mission to build the regional fashion industry by amplifying early stage fashion companies with an ecosystem of support and resources. More information is available at [www.nashvillefashionalliance.com](http://www.nashvillefashionalliance.com).

## ABOUT GHERZI

Established in 1929 in Zurich, Gherzi Textil Organisation is a Swiss based international consulting firm specializing in the textile, garment and fashion industries from fibers to the retail market. Gherzi provides advice to private companies, governments and organizations on various aspects of the sector including management & strategy consulting, engineering and investment banking services. Gherzi is present in over 30 countries through its own offices and representatives and has successfully implemented over 8,000 projects worldwide. More information is available at [www.gherzi.com](http://www.gherzi.com)

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## THE MARKET

High Quality Products  
+ Modern Business Models  
= Phenomenal CAGR\*

**BRANDS >5 YEARS 32%**  
**BRANDS <5 YEARS 26%**

\*combined average growth rate

# NFA 2025

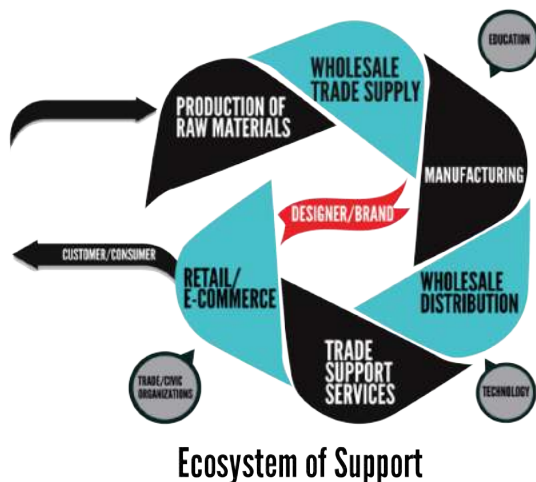
**\$9.5 BILLION**  
**25,000 JOBS**

**NFA 2015**  
**\$5.9 BILLION**  
**16,200 JOBS**

**Tennessee**  
**\$27 Billion**

## THE PLAN

### THE VISION



### THE MISSION

The NFA is building the regional fashion industry by amplifying early stage fashion business with an ecosystem of support and resources.

## WHY HERE...WHY NOW



#### LOCATION, LOCATION, LOCATION

- 3 major interstates with modern distribution
- 50% of US population live within a day's drive
- Uniquely collaborative creative cluster that's business friendly and cost effective.

**LARGEST PER CAPITA CONCENTRATION OF INDEPENDENT FASHION COMPANIES** outside of New York and Los Angeles.

#### ORGANIZED MOMENTUM

**360+**  
**MEMBERS**

**15,000**  
UNIQUE  
WEBSITE VISITORS

**132**  
**BRANDS**

**12,000**  
UNIQUE SOCIAL  
MEDIA AUDIENCE



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# GHERZI REPORT

# NFA

NASHVILLE FASHION ALLIANCE



# NFA Fashion Cluster Impact Study

by Gherzi Textil Organisation AG  
[www.gherzi.com](http://www.gherzi.com)

Commissioned by



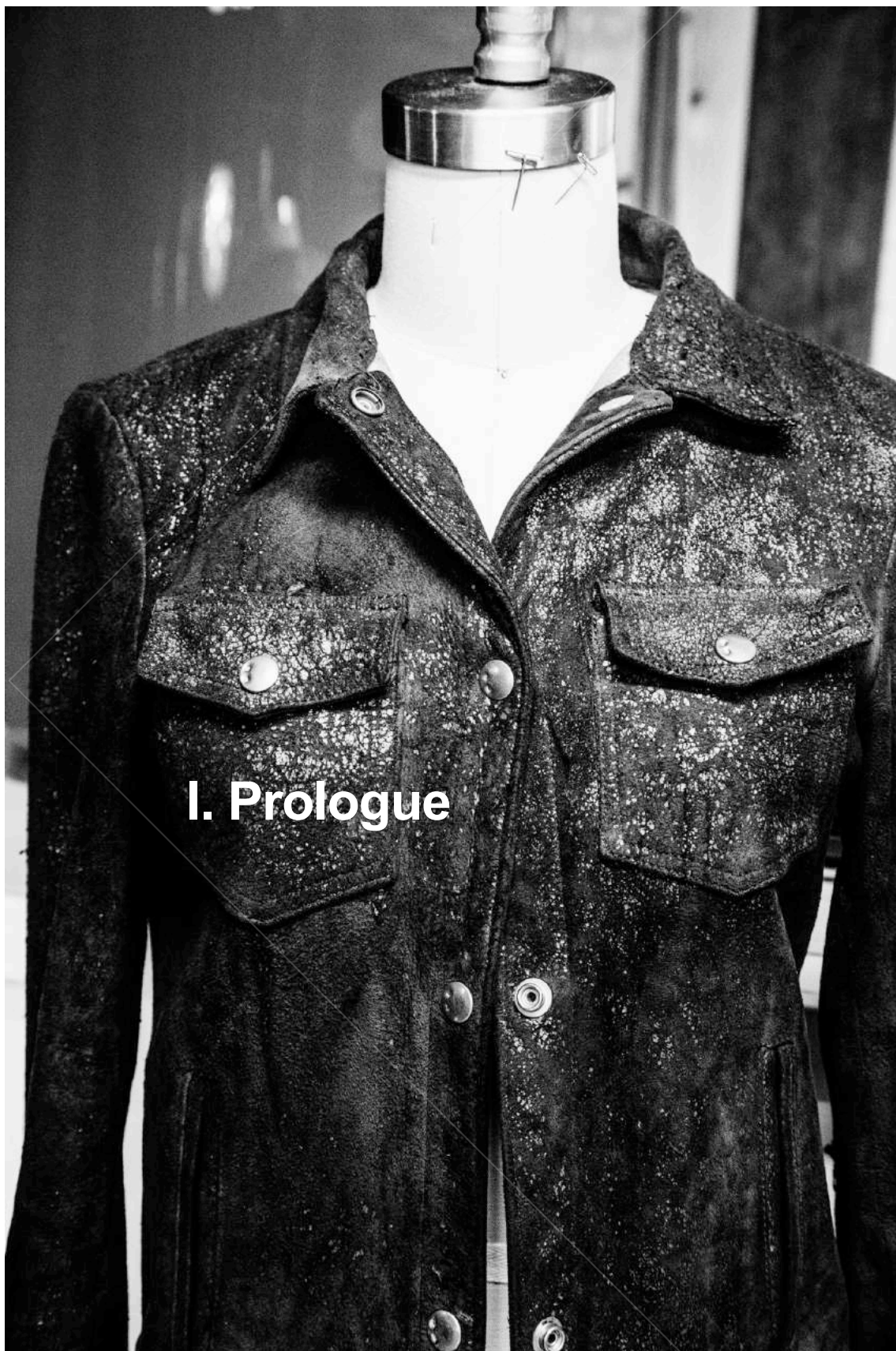
GHERZI





# NFA Fashion Cluster Impact Study

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## I. Prologue

# A dynamic cluster with a significant economic impact



## Introduction

In the past ten years, the Nashville region has been recognized as one of the fastest growing economies in the US. The city has experienced an average population growth of 1.8%, almost double the national average and is ranked fourth nationwide in terms of job growth. More importantly, Nashville has positioned itself as a national hub for the creative sector, led by the music industry. This position has led to the emergence of other segments that flourish in such a dynamic environment. The fashion industry, driven by one of the highest per capita concentration of fashion brands, retailers, designers and manufacturers nationally, has grown in leaps in the past five years. The industry is now positioned to become one of the key drivers of future growth with the potential not only to attract significant private capital investments and to generate growing revenues but also to create jobs and to draw talent from across the nation, placing this region on one of the most promising economic maps in the United States.

The following study, commissioned by the Nashville Fashion Alliance (NFA), looks at where the Nashville fashion industry stands today and projects its potential growth to 2025 with the objective of defining the working model for the NFA to achieve this growth.

# Destination of choice for new designers and brands

## The Nashville Fashion Alliance

Established in 2013, the objective of the Nashville Fashion Alliance (NFA) is to take the regional fashion industry to a world-class level on par with the city's reputation for music and health care. A sector driven association, the NFA vision is to become the destination of choice for emerging designers and fashion start-ups providing them with the tools and infrastructure that will enable them to create successful and growing businesses.

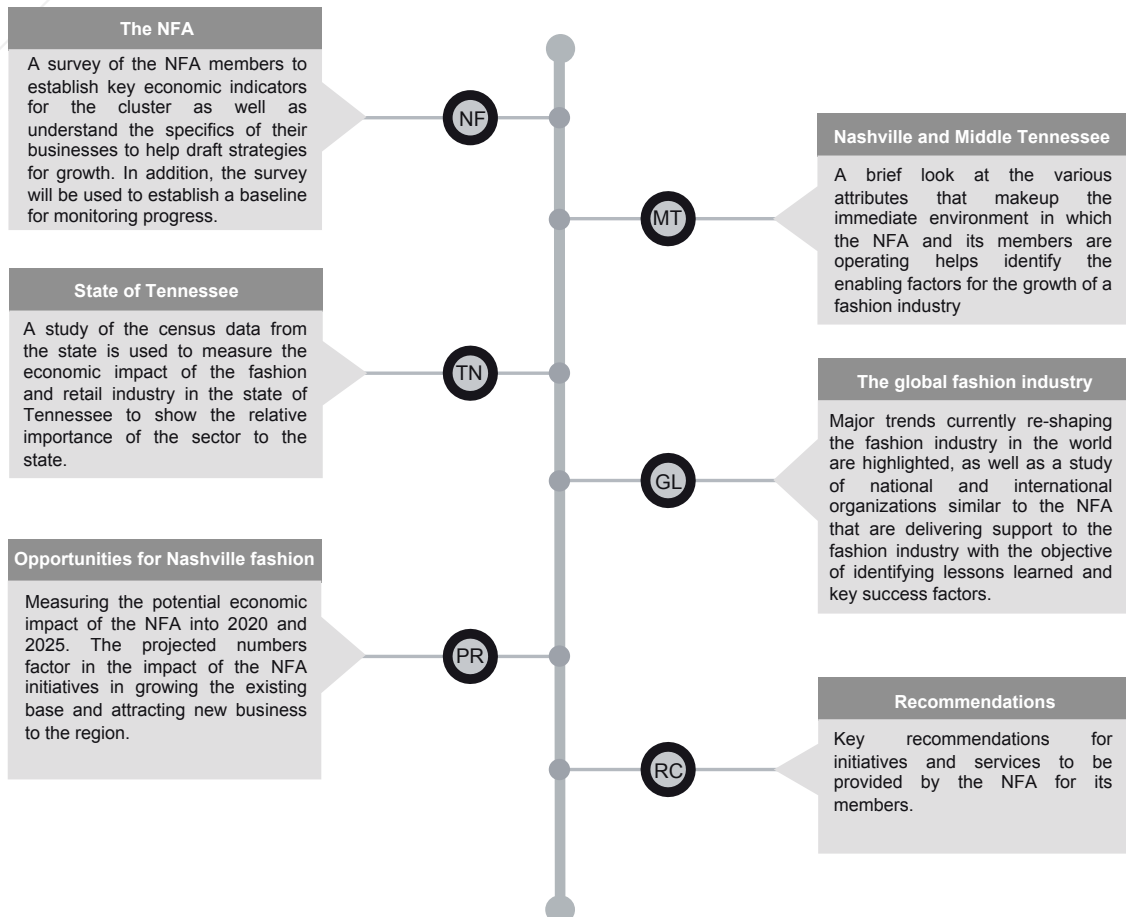
Benefiting from Nashville's growing market with its fast expanding fashion industry, the NFA will harness this dynamic environment to provide a springboard for emerging fashion businesses, building in the process one of the most modern fashion destinations in the nation, leveraging contemporary and future technologies to be ahead of the market.

In this short period since its inception, the NFA has massed over 360 members from the various disciplines of the industry and has managed to repeatedly position Nashville in various media as a key trendsetting fashion destination.



## Methodology

This study was built from the bottom up, starting with a survey of the NFA members, then analyzing the qualitative factors of the wider environment of Nashville and The Middle Tennessee region, followed by the economic impact of the fashion industry in Tennessee. The study then provides a brief look at the world trends that impact the fashion industry including a review of initiatives similar to the NFA (both nationally and internationally) for lessons learned. Finally, the study puts forward projections of the growth potential and outlines recommendations for achieving such potential.





## II. Nashville Fashion Alliance

A survey of a number of NFA members to establish key economic indicators for the cluster as well as understand the specifics of their businesses with the objective of drafting strategies for growth. In addition, the survey will be used to establish a baseline for monitoring progress.

# A center of innovation for emerging fashion

## NFA Survey

The NFA has completed a survey of its members. The purpose of this survey was to 1) measure the current economic footprint of the industry in Nashville represented by the NFA members and 2) to establish a baseline that can be used in the future to gauge the impact of the NFA role. It is important to note that not all NFA members answered the survey. However, a review of the respondents shows that the data is both representative of the cluster qualitatively as well as near comprehensive in terms of aggregate figures.

The results of the survey, show that the NFA has the opportunity to accelerate the phenomenal growth that the start-up fashion scene in the city has experienced organically in the past five years. The NFA can also position Nashville area as a center of innovation and a springboard for a contemporary, American-designed made market, which will seed an array of other creative industries that thrive on a strong fashion sector. In this section, findings of this survey will be detailed. Where possible, these findings will be interpreted in the context of the future potential for Nashville and the NFA.







# Number of fashion companies doubled in five years

## Size of the cluster and growth

In 2015, the recorded total direct revenues of the respondents was \$697 Million (Exhibit 2-1) and employment was over 1,500 workers. The majority of the sales were made by large companies (as defined by number of workers).

A closer look at the relationship between the size, age and growth of the respondents gives a more accurate assessment of the potential growth of the industry. The study shows that 54% (Exhibit 2-2) of the surveyed members were established in the past five years and in 2015 have generated \$56 million in revenues. More interestingly is that those companies have grown at a Compounded Average Growth Rate (CAGR) of 32% over the last three years. Another quarter of the members were established between six and ten years ago. In other words: close to 80% of the members are relatively young companies showing impressive growth.

Looking at size distribution, Micro, Small and Medium companies have generated revenues of \$67.3 million in 2015 and have experienced an average CAGR of 25% in the past three years (Exhibit 2-3).

The conclusions we can draw from this analysis are that: 1) the industry in Nashville is witnessing an unprecedented growth in terms of number of new companies / brands / designers being established and 2) the growth in terms of sales revenues is exceptional. Later in this report we will see that the potential growth of the NFA cluster alone can generate up to \$9.5 billion in economic impact and employ 25,000 number of workers by 2025.

It is expected that the NFA initiatives and activities will fuel the next level of growth and compound the projected figures even further.

NFA - Company size breakdown [Exhibit 2-1]

	Number of companies	Sales (2015) (million)	% of total	Criteria for segmentation
<b>Total</b>	<b>79</b>	<b>\$697.3</b>	<b>-</b>	<b>No. Of workers</b>
Large	4	\$630.0	90.3%	+100
Medium	10	\$ 61.5	8.8%	10 - 99
Small	28	\$ 5.0	0.7%	2 - 9
Micro	37	\$ 0.8	0.1%	1

Source: Gherzi survey

Respondents year of establishment (No. of companies and % of total) – [Exhibit 2-2]



Source: Gherzi survey

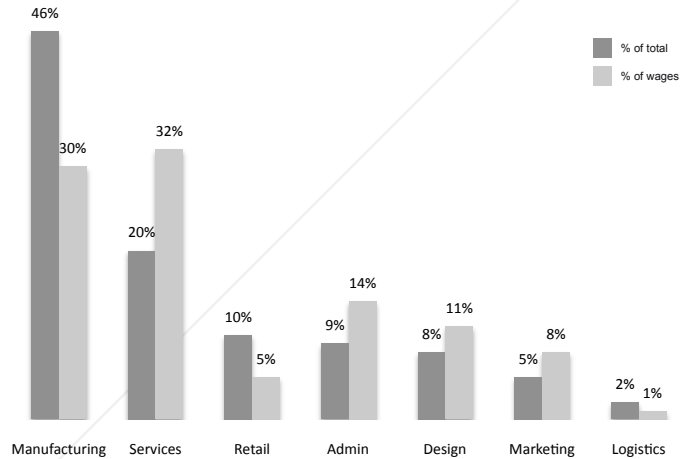
Respondents growth based on year of establishment and by size – [Exhibit 2-3]

Criteria	Revenue (mn)			CAGR %
	2015	2014	2013	
Established: 2010 - Present	56.4	44.3	32.6	32%
Established: 1920 - 2010	640.7	636.9	634.3	1%
Comibned sales of Micro / Small / Medium	67.3	53.9	42.7	26%

Source: Gherzi survey

# High concentration of designers

Distribution of workers by function and by wages – [Exhibit 2-4]



Source: Gherzi survey

## Labor Force

In 2015, the respondents employed around 1,606 workers. The average yearly wage stood at \$47,300 and workers generated on average: \$434,000 / worker in yearly revenues. It was noted that the average revenue per worker was significantly higher in larger companies which means that the growth in smaller companies results in higher employment ratio. In terms of distribution, 46% of workers were employed in manufacturing. However, the ratio of production workers to designers stood at 6:1 compared to a national average of 8:1 suggesting that Nashville is more design-centric.



# Competitive designer wages



## Labor Force (cont'd)

This is further validated by the fact that in terms of wages (Exhibit 2-6), Nashville design wages are 15% lower than the national average (retail is also 25% lower), while manufacturing wages are at par with the national norm. This shows that Nashville is more competitive on design and retail compared to other fashion destinations in the US.

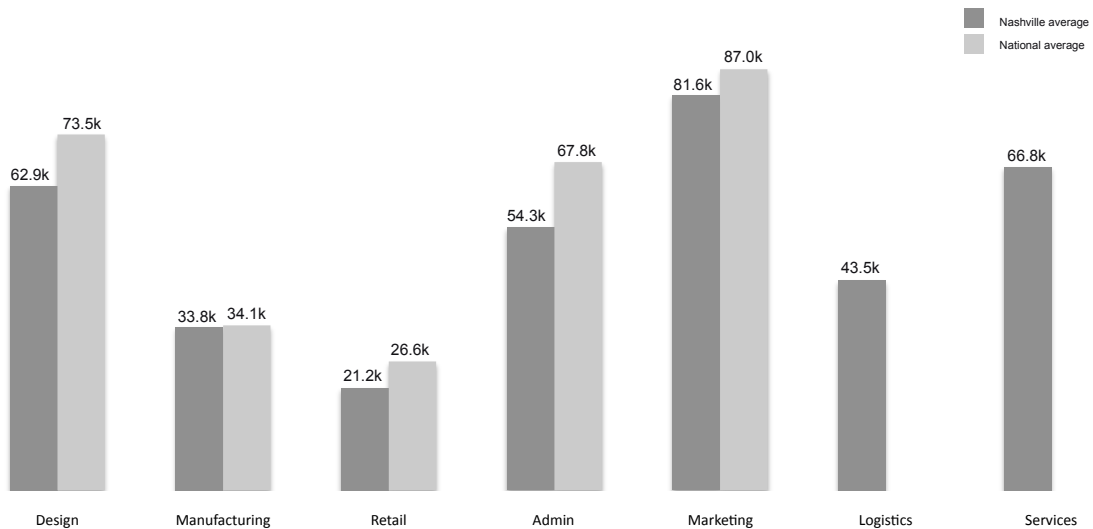
A look at the levels of education and training within the respondents workforce (Exhibit 2-5) will be important – as will be demonstrated later in this report – for projecting the talent that will be needed to build up the industry in the coming 10 years.

## Workforce profile – [Exhibit 2-5]

Education	% of workforce
Unskilled	9%
Skilled	25%
High school	25%
College	36%
Post grad	3%
Prof diploma	2%

Source: Gherzi survey

## Nashville fashion and retail industry wages compared to National average – [Exhibit 2-6]

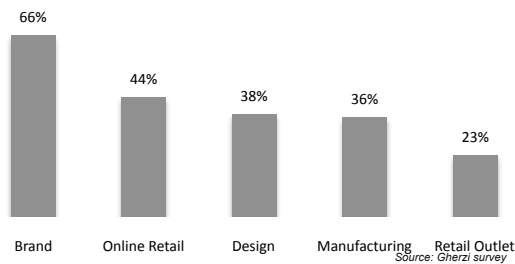


Source: Gherzi Survey - Bureau of Labor statistics

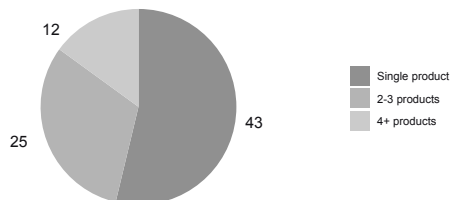
## Significant local manufacturing indicating higher quality products



Company activities – [Exhibit 2-7]



Number of products – [Exhibit 2-8]



### Activities and product segments

In terms of activities (Exhibit 2-7), 66% of respondents have identified themselves as owning a brand, 44% have online retail and 38% design their own products. What is also interesting is that 36% of the respondents have their own manufacturing, showing a tendency within the cluster for higher quality products: a conclusion that will be further confirmed later in this report when analyzing the sourcing practices of the cluster members.

In terms of product ranges, 43% of the members are focusing on only one product, while 25% have two to three products (Exhibit 2-8). This shows a high degree of specialization within the cluster.

# Garments and jewelry lead sectors

Single product companies (No. of companies) – [Exhibit 2-9]



Source: Gherzi survey

## Activities and product segments (cont'd)

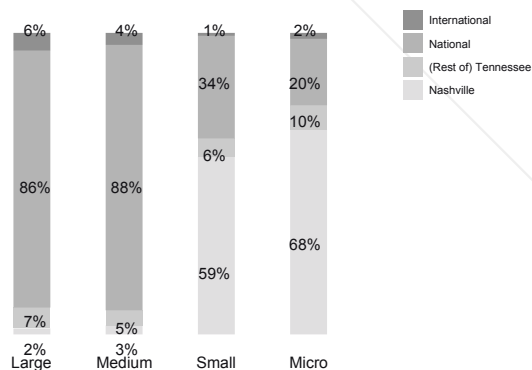
A breakdown of the offering of single-product companies (Exhibit 2-9) shows that garments and jewelry are the two dominant products with 49% and 28% respectively in terms of number of companies.





## Smaller companies focus on local markets

Geographic focus by company category – [Exhibit 2-10]



Source: Gherzi survey

### Geographic Focus

Looking at the markets served by the cluster (Exhibit 2-10), 85% of sales are happening nationally and outside of Tennessee. However, zooming in on sales by company size reveals that the majority of Large and Medium companies' sales are happening outside Tennessee while for Small and Micro companies the majority of revenues are coming from Nashville with another small percentage from Tennessee. This information will be useful when designing sales promotion activities for the cluster. Whereas, emerging brands benefit from a strong local market in their start-up phase, growth will inevitably happen by expanding beyond state borders.

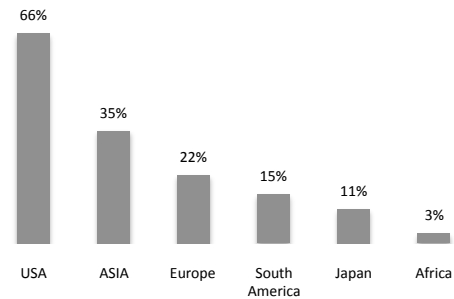
# Strong inclination towards high-end products

## Sourcing practices

Sourcing practices are a key indicator of the price and quality levels of respondents' products. The survey showed that 66% of respondents sourced their raw materials in the US, 22% from Europe and 11% from Japan (Exhibit 2-11), which shows a strong tendency to use higher end raw materials and therefore to focus on higher quality products. This conclusion is further confirmed when looking at countries of manufacturing where 74% of respondents are sourcing their finished products in the US and another 4% in Europe (Exhibit 2-12).

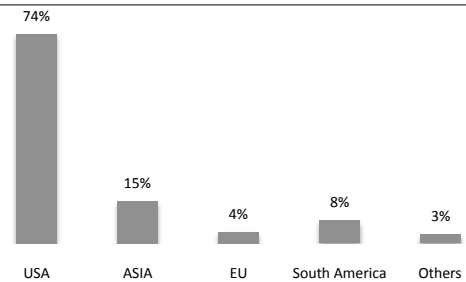
A more detailed look at raw materials, shows that metals, fabrics, pearls & stones and leather are the four materials most used by respondents (Exhibit 2-13) and they are also largely sourced from higher-end destinations (Exhibit 2-14).

Sourcing destination of raw material – [Exhibit 2-11]



Source: Gherzi survey

Sourcing destinations of products – [Exhibit 2-12]



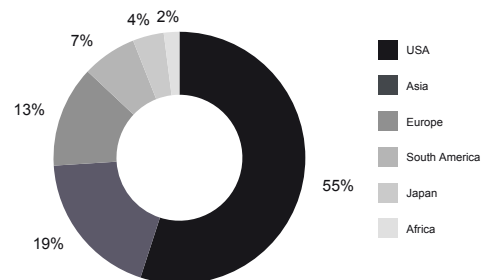
Source: Gherzi survey

Key materials used by NFA members – [Exhibit 2-13]

Raw material	Entries	%
Metals	25	18%
Fabrics	65	49%
Pearls and stones	15	11%
Leather	29	22%

Source: Gherzi survey

Key raw materials sourcing origin – [Exhibit 2-14]



Source: Gherzi survey





### **III. Nashville and Middle Tennessee**

A brief look at the various attributes that makeup the immediate environment in which the NFA and its members are operating helps identify the enabling factors for the growth of a fashion industry

# The NFA operates in a dynamic environment

To understand the full potential of the Fashion industry in Nashville, a look at the wider environment and other enabling factors provide a more comprehensive view.

## Heavyweight players

Middle Tennessee enjoys the presence of some of the fashion industry's biggest players. Such companies represent a key enabling factor that attracts talent, provides experience locally, and helps bring depth to the supply chain. Even though some of these players have not been brought into the NFA survey, they are accounted for in the Tennessee statistics (showing later in this report). The list of large players includes:

**Genesco headquarters:** a publicly owned specialty retailer of branded footwear, licensed and branded headwear, and licensed sports apparel and accessories. Genesco is also a wholesaler of branded and licensed footwear.

**Singer headquarters:** a world leader in the manufacturing of sewing machines with millions of units sold yearly in the US and worldwide.

**VF Imagewear, Inc headquarters:** a subsidiary of VF Corporation, VF Imagewear is focused on workwear with brands such as Red Kap, Bulwark, Horace Small and VF solutions.

**Distribution and service centers of major retailers:** several retailers have established regional distribution centers in Middle Tennessee including: **The GAP** with a 2.8 Million square-foot facility in Gallatin; **Under Armour** just launched an impressive facility in Mt. Juliet with plans to hire over 1,500 employees within the next five years; while one of **Macy's** four national distribution centers is based in Portland, Tennessee. **Warby Parker** has its customer service center located in Nashville.

The list is not exhaustive and the presence of such strong names usually motivates other big players to follow suit, creating a snowball effect.



## Enabling environment for a fashion industry

In addition to the presence of strong fashion players, other industries play a major role in supporting the growth of a fashion industry in Nashville:

### **Tourism**

One of the key enabling factors for the fashion industry in the region will be its own captive market of tourists. In 2015, Nashville greeted 13.5 million visitors with a total spending of over \$5.4 billion. The presence of such a dynamic local market is again a key success factor to any emerging fashion industry.

### **Music industry**

With an estimated \$10 billion in economic impact, the Nashville music industry ranks in the top three cities nationwide. The presence of such a dynamic industry provides a fertile environment for other creative sectors, including fashion. There are several links between those two industries offering growth opportunities for both.

The interaction among tourism, music and fashion will play in favor of all three industries and will pull with them a number of other creative sectors such as culinary and contemporary arts.

Moreover, the strong presence of the healthcare and tech industries can potentially offer additional opportunities in wearable technologies and medical textiles.





## A number of success factors

### **Nashville Micro Environment**

In addition to the macro environment, the Nashville fashion industry enjoys several local advantages. In the past five years, the region has emerged as a new and promising destination for fashion designers and brands. Having one of the highest per capita concentrations of designers, it ranked fourth nationally after New York, Los Angeles and Columbus. This positioning of Nashville on the fashion map is due to several factors:

#### **Competitive wages**

Nashville design and retail wages are significantly lower than the national average. A detailed look at wages will follow in this study.

#### **Central location**

Nashville sits on the intersection of three major interstate highways making it within a day's drive from key major markets with more than 70% of the national purchasing power.

#### **Organized industry**

With the establishment of the NFA, the industry has chosen to consolidate its efforts and to pool its resources to grow. The involvement of civil society is one of the key success factors for fashion clusters.

#### **Growth**

Most fashion industries grow initially on the back of an existing local demand. The growth that Nashville has witnessed (mentioned above) both in terms of population as well as in average wages is showing a growing demand from an upper middle class that can drive the local sales.

#### **Universities**

There are more than 117,000 students attending higher education institutions in the Nashville region. Of the 17,000 yearly graduates, 10,000 choose to remain in Nashville. A number of these institutes have dedicated fashion design courses as well as other majors necessary to support the growth of the industry.



## IV. State of Tennessee

A study of the census data from the state is used to measure the economic impact of the fashion and retail industries in the state of Tennessee to show the importance of the sector to the state.

# \$27 billion total revenues for Tennessee



## Fashion and retail in Tennessee

It is equally important to understand the wider environment by which the Nashville fashion industry will grow by studying the sector in Tennessee (Exhibit 4-1).

Fashion, including manufacturing, wholesale, and retail represent a key sector in the state economy, with over \$13.85 billion in gross business revenues and over 50,000 people employed. The retail sector alone generated \$3.2 billion in taxable sales in 2014 and employed around 35,000 workers; while manufacturing and wholesale generated over \$9.7 billion in revenues and employed more than 14,750 people.

However, the wider definition of the fashion industry includes over 24,600 indirect jobs with additional indirect revenues of \$13.5 billion. This brings the total economic impact of the Tennessee fashion industry in 2014 to \$27.35 billion in revenues and total employment of 74,304 workers (Exhibit 4-2).

## Fashion and apparel industry in Tennessee – [Exhibit 4-1]

<b>Total jobs</b>	<b>49,627</b>
Design and manufacturing	5,662
Wholesale	4,796
Headquarters	3,250
Retail	31,618
Total non employers	4,301
<b>Taxable retail sales (billion)</b>	<b>\$3.20</b>
<b>Gross business revenues (billion)</b>	<b>\$13.71</b>
Manufacturing & wholesale	\$9.73
Retail	\$3.99
<b>Impacts of manufacturing, wholesale and HQ</b>	
Total jobs	14,150
Total revenues (billion)	\$19.4
<b>Total statewide economic impacts</b>	<b>\$13.71</b>
Total jobs	70,241
Total revenues (billion)	\$27.33

Source: US census, US labour statistics, Tennessee State Department of Revenue

## Impact - Fashion and apparel industry in Tennessee – [Exhibit 4-2]

	Revenue (bn)	Jobs	Labor income (bn)
<b>Direct impacts</b>	<b>\$13.83</b>	<b>46,377</b>	<b>\$0.99</b>
Design, manufacturing, wholesale & self employed	\$9.74	5,662	5,662
Retail sales	\$4.09	4,796	4,796
<b>Indirect and induced impacts</b>	<b>\$13.50</b>	<b>23,864</b>	<b>\$0.46</b>
Design, manufacturing, wholesale & self employed	\$9.70	2,830	0.20
Retail sales	\$3.80	21,034	0.26
<b>Total impacts - Fashion and apparel industry</b>	<b>\$27.33</b>	<b>70,241</b>	<b>\$1.45</b>
Design, manufacturing, wholesale & self employed	\$19.44	14,150	0.67
Retail sales	\$7.89	56,091	0.78

Source: US census, Tennessee State Department of Revenue

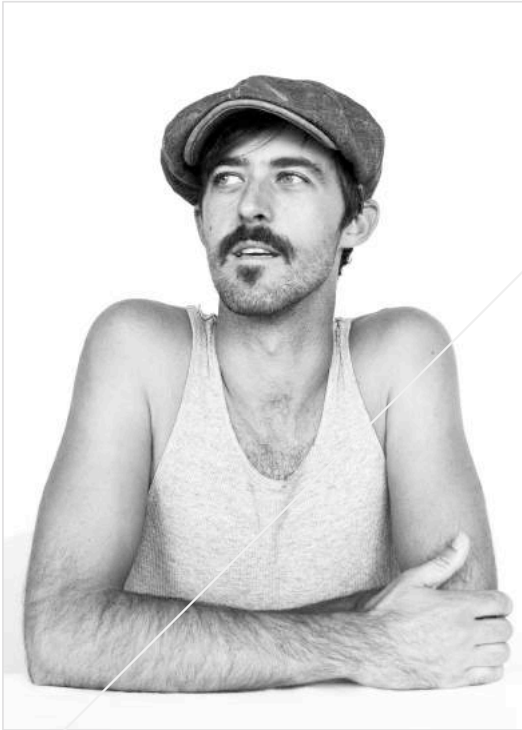




## V. Global Fashion Industry

Major trends currently re-shaping the fashion industry in the world are highlighted, as well as a study of national and international organizations similar to the NFA that are delivering support to the fashion industry with the objective of identifying lessons learned and key success factors.





## The fashion industry is witnessing a structural change

To be able to define future strategies for the NFA, this study has looked at the particularities of its members; then to its immediate ecosystem of Nashville and Middle Tennessee, and finally at the wider environment of the state of Tennessee. Two other important dimensions need to be factored in when defining the way forward. These factors are the “Trends Shaping the Industry” as well as the “Lessons Learned from Similar Initiatives”. Both those factors have been detailed in a separate report; however, the key and most relevant findings are summarized below.

### Trends Shaping The Industry

The fashion industry – like everything else – is witnessing a structural change that is being brought on by the changing realities of the existing socio-economic order. The sharing economy, a more conscious consumer, new manufacturing technologies and shifting priorities are some of the factors shaping the new fashion sector. This reshuffling of the industry is offering opportunities for new fashion designers and brands that are able to build business models that can answer to the sector in its modern shape. There are tons of trends that are currently reshaping the industry, many of those trends fall under two main themes which can shape the NFA's future strategy:

#### A more conscientious consumer

Retail customers are increasingly demanding products that are sourced ethically as well as ones that will put the least pressure on the environment during and after their use. This is putting pressure on the fashion industry to start the process by designing responsibly. Concepts such as **design to last**, **design to rebirth** and **design to up-cycle** (re-use) will become the new norm. Fashion companies now need to include in their design where the product will end up after it has been used, leading to innovation in **biodegradable** materials and retail concepts that address **recycling of products** at the end of their life. Moreover, the business model will shift from fast-fashion with its frivolous style change to a more quality-oriented market with products that can last longer. Finally, the market will demand full **transparency** across the chain as well as **corporate social responsibility** with regards to workers and preservation of the environment.

#### A new shopping experience

Several technologies are making it possible today to change the way consumers are buying products. On the manufacturing level, **3D production** (such as 3D printing and 3D knitting) as well as **automated sewing** are allowing brands to manufacture competitively one piece at a time, making it possible to offer **mass customization** and to manufacture closer to the market, which in turn is creating **shorter manufacturing chains**, smaller stock levels and significantly more complex designs. Moreover, relying on complex IT solutions is allowing for new retail models such as **3D body scanning** and **redefinition of ownership**. These trends are already manifesting themselves in new business models such as fully customized running shoes, online made-to-order suits, garment swapping platforms, and rentals of expensive designer branded products. While **Ecommerce** is allowing brands to switch to a **direct-to-consumer** model, disrupting the existing structure by eliminating the need for wholesalers.

# Focus is key to success



## Lessons From Similar Initiatives

There are several national and international organizations that, similar to the NFA, were established by the industry, civil society or governments to support and grow the fashion sectors in their respective locations. Even though no two organizations are identical, there are several broad themes that almost all such initiatives have in common. Based on scanning over 50 national and international organizations and selecting 10 of them for a more in-depth analysis, three key conclusions are especially relevant to the NFA:

### 1. Scope of support

The study of similar organizations showed that their scopes are composed of five key themes. Every one of the scrutinized initiatives addresses a minimum of four of those areas and typically all five. The main themes are:

**Producing:** While set-ups may vary significantly, most initiatives give their beneficiaries access to small batch and shared manufacturing for sampling, product development or production of small orders.

**Learning:** Training courses, short and long-term diplomas, mentoring programs and peer to peer coaching are examples of learning opportunities provided by organizations.

**Connecting:** Whether it's an introduction to a supplier or a subcontractor, a key theme in assisting the fashion industry is providing networking opportunities.

**Supporting:** The support organizations give their members can come in many forms such as providing shared office space, financial grants, group bargaining, access to market information or legal services.

**Promoting:** Most organizations engage in one of two key types of promotion: introduction to selling opportunities (such as buyers and franchise opportunities) and matchmaking with investors.

### 2. Specialization

The study of other organizations, especially ones that were established more recently, also shows that specialization is key. Fashion is one of the most dynamic sectors and is characterized by high levels of mobility, with new players sprouting all the time and grabbing market share from established brands. Within this fast-changing sector some cities have managed to remain at the heart of the fashion world. New York and Los Angeles are the national fashion capitals competing with cities like Paris, Milan and London. These established cities enjoy the critical mass and the infrastructure to attract successful brands and talent. Cities such as Nashville that are starting to penetrate this sector have to carve for themselves niches with a clear focus and the ability to differentiate themselves. Examples of destinations that have successfully created space for themselves in the fashion market include Amsterdam's Denim City with its specialization in jeans, and Copenhagen with its focus on sustainability and a very narrow focus on targeting the Scandinavian market.

### 3. Government support

In all reviewed organizations, the government played a central role in securing the success of those initiatives. The scope of support from the government varied from providing financial support, to making available physical space and to providing special incentives for the fashion sector. Governments in the studied cities have realized the economic benefits of a vibrant fashion industry both in terms of revenues and employment as well as qualitative benefits such as positioning of their respective cities as modern and dynamic destinations. Projecting such an image has indirect benefits such as attracting residents, investments, businesses and tourism. Government support is one of the key success factors for fashion clusters.



## VI. Opportunities for Nashville Fashion

Measuring the potential economic impact of the NFA into 2020 and 2025. The projected numbers factor in the impact of the NFA initiatives in growing the existing base and attracting new business to the region.

# Potential to reach \$9.5 billion in revenues and employment of 25,000 people by 2025

## Opportunity for NFA

For Nashville, many of the success factors are coming together for a growing fashion industry. The growth that emerging fashion brands have experienced in the past years has been a phenomenal 32%. Support to those companies and the creation of the infrastructure necessary to foster emerging designers and brands can create a significant economic impact for Nashville.

In the following table (Exhibit 6-1), the survey results have been projected based on the current growth and the multipliers recorded in Tennessee to measure the size of the opportunity for Nashville in growing its fashion industry. Considerations have been made based on company sizes and their ability to grow revenues and employment. The multipliers used are based on the recorded ratios in the Tennessee fashion and retail statistics.

With the proper support the NFA cluster has the opportunity to reach a total economic impact of \$9.5 billion by 2025 while creating direct and indirect employment of up to 25,000 jobs in the same period.

To realize this potential, the NFA will need to provide significant support for its members, detailed in the following section of this study.



Potential future economic impact of NFA – [Exhibit 6-1]

	2015	2020	2025
<b>Total jobs</b>	<b>1,606</b>	<b>2,300</b>	<b>3,800</b>
<b>Taxable retail sales (million)</b>	<b>\$697</b>	<b>\$850</b>	<b>\$1,100</b>
<b>Gross business revenues (million)</b>	<b>\$3,018</b>	<b>\$3,600</b>	<b>\$4,800</b>
Manufacturing & wholesale	\$2,128	\$2,600	\$3,400
Retail	\$890	\$1,000	\$1,400
<b>Impacts of manufacturing, wholesale and HQ</b>			
Total jobs	589	900	1,400
Total revenues (million)	\$4,242	\$5,100	\$6,500
<b>Total NFA economic impacts</b>			
Total jobs	16,200	20,000	25,000
Total revenues (million)	\$5,960	\$7,000	\$9,500

Source: Gherzi survey and analysis



MORTON & MABEL

## VII. Recommendations

Key recommendations for initiatives and services to be provided by the NFA for its members.





# Comprehensive programs for emerging and seed-stage brands and designers



## Recommendations

The Nashville Fashion Alliance's mission is to become the destination of choice for early-stage and emerging brands and designers by providing the necessary infrastructure to amplify their potential for success and growth. This is a focused mission, one that addresses a significant need in the market. While New York and Los Angeles are able to provide growth opportunities for successful and growing brands, there is a significant need for a fashion destination that has the necessary ingredients for emerging designers, a need that Nashville is very well-placed to fill.

Becoming the springboard for new fashion brands and designers requires building an infrastructure that addresses their specific needs.

To follow are recommendations for each of the five key themes for building fashion organizations/clusters:

### 1. Producing

Start-up companies and designers are always faced with a number of challenges in production, such as prohibitive minimums when outsourcing, expensive specialized machinery (example: 3D printing and digital pattern making) and seasonality that makes retaining permanent staffs a significant liability. As previously discussed, providing small batch production space for members is one of the key services to support start-up brands in product development, small orders or producing specialty product requiring expensive machinery.

We recommend that the NFA establishes a small batch production space that can cater to start-ups in textiles and garments, jewelry and leather goods. Such a space should be equipped with basic equipment as well as some specialized machinery (to be identified with members). Moreover, the space should be staffed with technical experts that can also support members in conceiving their products.

### 2. Learning

One of the biggest challenges faced by start-up brands and designers is the ability to convert their talent into a viable business. Start-ups often lack the know-how to build a vertical structure that can manage the process from product development to sales and customer service, including sourcing, packaging, merchandising, pricing and retail, while maintaining an eye on business practices and controls such as accounting, finance, warehousing and logistics. Two key ways in which we recommend the NFA to support its members are mentoring and short-term education (training):

#### Mentoring

Based on need, mentoring can be as simple as peer-to-peer exchange of experiences in regular meetings between NFA members or it can happen through more structured and longer term coaching from industry leaders and business gurus.

#### Short-term education

Similar to coaching, training courses and short-term diplomas are useful tools in helping start-ups build viable companies. We recommend the NFA to make available to its members a range of specialized business courses such as accounting, marketing or online / retail as well as technical courses such as pattern making and sewing techniques.





## Recommendations

### 3. Connecting

Surveying NFA members revealed a repeated need for support in finding two types of suppliers:

#### Raw materials

Finding suppliers of raw materials (fabrics, metals, etc.) that are able to work with small designers, especially with regard to minimum order quantities which are often prohibitive for start-ups.

#### Specialized subcontractors

Outsourcing contractors with specialized machinery or manufacturing techniques.

We recommend that NFA assist in collective bargaining and as a facilitator to put members and suppliers in contact starting with fabric. Eventually, the NFA should be able to have an in-house library of materials for the various industries in its membership base.

### 4. Supporting

Whereas the headline of support can include several services, there are some key areas that we recommend the NFA start with:

#### Shared office space

In addition to shared manufacturing, studios with shared facilities (such as common meeting rooms, administrative support and printing centers) are one of the biggest needs for start-ups. Shared office spaces enable smaller businesses to share expenses and benefit from a much bigger and more complex set-up than they can afford on their own. Moreover, a physical location helps the NFA provide services for its members and organize events as well as attract suppliers, buyers and media because of the concentration of companies in one location.

### Legal and accounting services

Most small companies struggle with finding good legal and accounting services as their budgets are usually too small to afford the best advice. Legal services can include establishment, contract drafting with employees, suppliers and buyers, franchising, while accounting services include bookkeeping, reporting and tax services. The NFA can play a critical role in providing such services by consolidating the needs of its members and negotiating global contracts with service providers.

### 5. Promoting

We recommend the NFA to promote its members on two key levels:

#### Selling opportunities

Providing selling opportunities for members can include some or all of the following:

- Introduction to buyers
- Participation in trade fairs and selling missions
- Providing online selling platforms
- Organizing shared retail outlets

#### Access to funds

Upon the completion of the start-up phase, most companies will require funding to fuel the next level of growth. The NFA can play a critical role in making available those funds for its members either through creating its own accelerator program or through targeting investors with investment opportunities in some of its members.



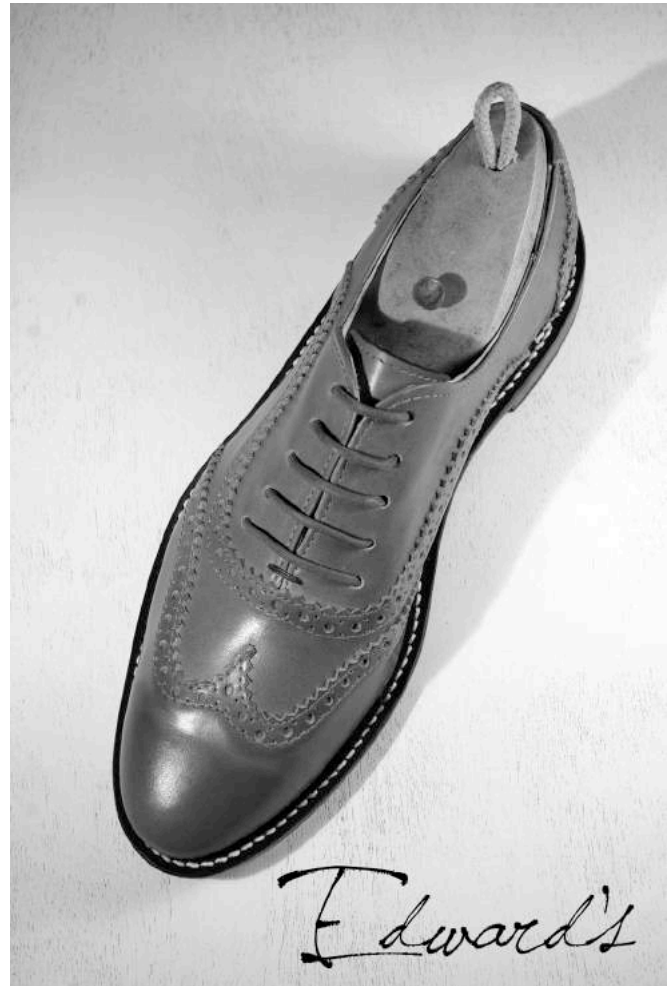
# A fully equipped resource center with an accelerator program

## Recommendations

As mentioned earlier, we believe that the NFA has positioned itself to answer a key need in the fashion sector today. There are currently no fashion destinations that provide the necessary infrastructure for new brands and designers to start their businesses and grow. Providing this infrastructure would attract talent nationwide and position Nashville as the destination for seed stage and emerging fashion businesses.

We believe that one of the key success factors for the NFA is the ability to consolidate the above mentioned recommendations in a **seamless package** of initiatives that work together to deliver a comprehensive **accelerator program** for its members, converting ideas into viable businesses. Taking companies from the seed-stage through mentoring, support in manufacturing, assistance in sales, consolidating services and finally to investment and growth.

Therefore, we strongly believe that a well-equipped location is key to the success of the NFA initiative. The physical space (offices / production space / support facilities) in this stage of the development of start-ups is a critical factor for their success and growth. Being able to offer the above mentioned packages of support in one central location will guarantee much higher success for the NFA members as well as cut cost and maximize the benefit from synergies.





Established in 1929 in Zurich, Gherzi Textill Organisation is as Swiss based international consulting firm specializing in the textile, garment and fashion industries from fibers to the retail market. Gherzi provides advice to private companies, governments and organizations on various aspects of the sector including management & strategy consulting, engineering and investment banking services. Gherzi is present in over 30 countries through its own offices and representatives and has successfully implemented over 8'000 projects worldwide; Gherzi is proud that its work is often used as a reference in the industry.



# CASE STUDIES

# NFA

NASHVILLE FASHION ALLIANCE





# Economic Cluster Analysis Present - Future

for



Nashville – Tennessee  
U.S.A.

Nashville  
September  
2016

## AGENDA

01

### Fashion clusters : 10 case studies around the World

*From whom could we be inspired?*

02

### Best practice : Top-notch services and projects

*Which initiatives could be adapted to the NFA context?*

03

### New trends in the textile scene

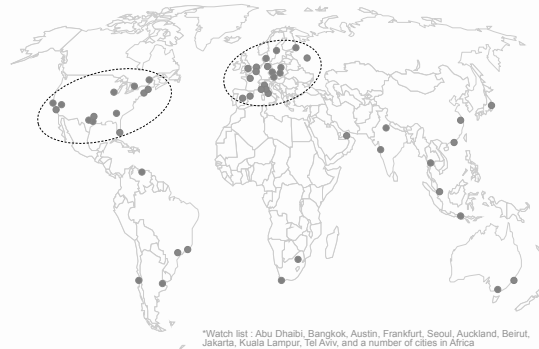
*What should be carefully looked at?*

## 50 cities emerge as leading fashion hubs including 13 in North America and 19 in Europe

From #1 to #25

#1 Paris, France  
 #2 New York, USA  
 #3 London, United Kingdom  
 #4 Los Angeles, USA  
 #5 Rome, Italy  
 #6 Milano, Italy  
 #7 Barcelona, Spain  
 #8 Berlin, Germany  
 #9 Madrid, Spain  
 #10 Tokyo, Japan  
 #11 Florence, Italy  
 #12 Hong Kong, China  
 #13 Sydney, Australia  
 #14 Singapore, Singapore  
 #15 Shanghai, China  
 #16 Sao Paulo, Brazil  
 #17 Dubai, UAE  
 #18 Rio de Janeiro, Brazil  
 #19 Miami, USA  
 #20 Dallas, USA  
 #21 Monaco, Monaco  
 #22 Moscow, Russia  
 #23 Amsterdam, Netherlands  
 #24 Boston, USA  
 #25 Antwerpen, Belgium

### Top 50 Global Fashion Capitals 2015\*



- This exclusive ranking is based upon GLM's Narrative Tracking technology
- NarrativeTracker analyzes the Internet, blogosphere, the top 250,000 print and electronic news media, as well as new social media sources (such as Twitter) as they emerge
- The words, phrases and concepts are tracked in relation to their frequency, contextual usage and appearance in global media outlets

From #26 to #50

#26 Las Vegas, USA  
 #27 Chicago, USA  
 #28 Toronto, Canada  
 #29 Buenos Aires, Argentina  
 #30 Houston, USA  
 #31 Caracas, Venezuela  
 #32 Atlanta, USA  
 #33 Prague, Czech Republic  
 #34 Vienna, Austria  
 #35 St. Petersburg, Russia  
 #36 Copenhagen, Denmark  
 #37 San Francisco, USA  
 #38 Mumbai, India  
 #39 New Delhi, India  
 #40 Bali, Indonesia  
 #41 Cape Town, South Africa  
 #42 Warsaw, Poland  
 #43 Santiago, Chile  
 #44 Krakow, Poland  
 #45 Austin, USA  
 #46 Stockholm, Sweden  
 #47 Montreal, Canada  
 #48 Johannesburg, South Africa  
 #49 Melbourne, South Africa  
 #50 Bangkok, Thailand

Source : Global Language Monitor

## 10 case studies selected!

From #1 to #25

#2 New York, USA  
 #23 Amsterdam, Netherlands  
 #25 Antwerpen, Belgium

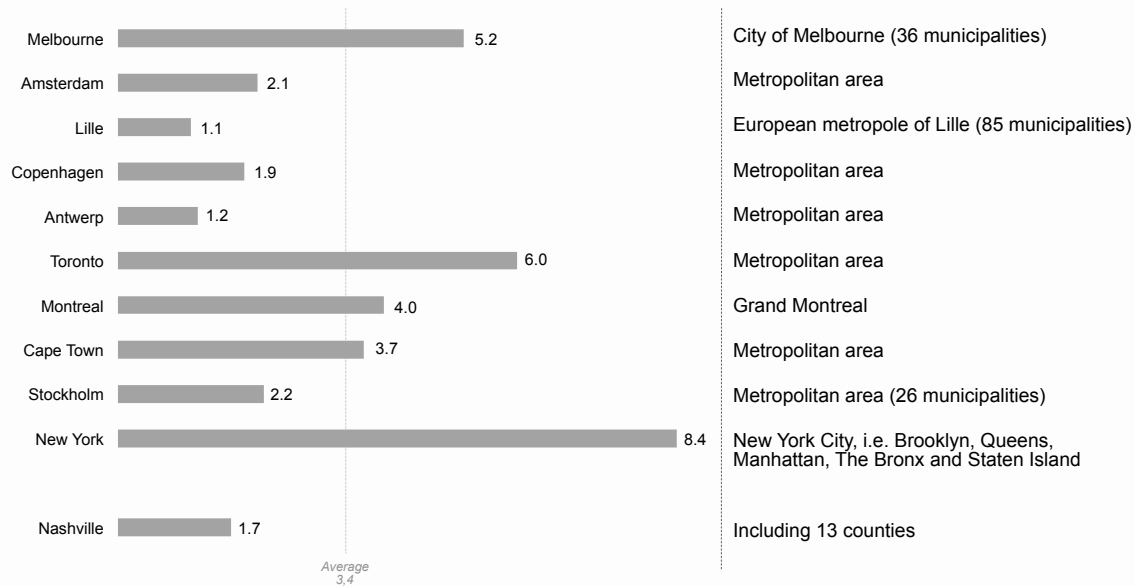


From #26 to #50

#28 Toronto, Canada  
 #36 Copenhagen, Denmark  
 #41 Cape Town, South Africa  
 #46 Stockholm, Sweden  
 #47 Montreal, Canada  
 #49 Melbourne, South Africa  
 +Lille, France



## Metropolitan areas – Number of habitants (in million)



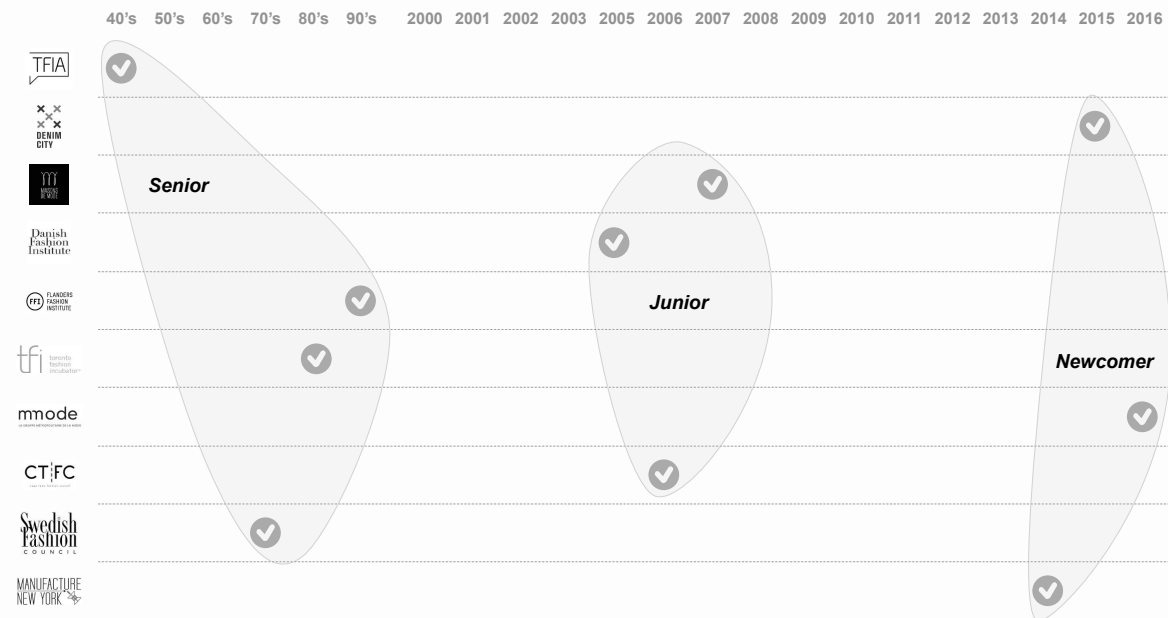
Source : Various Census and local sources of information

X

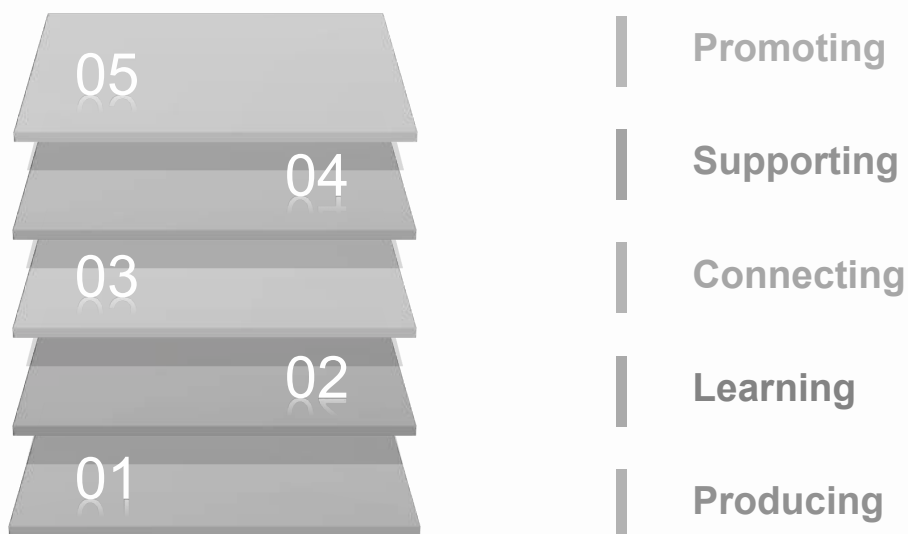
## 10 base studies of existing clusters



## A mix of old and recent organisations



## A spectrum of services organised in 5 main topics

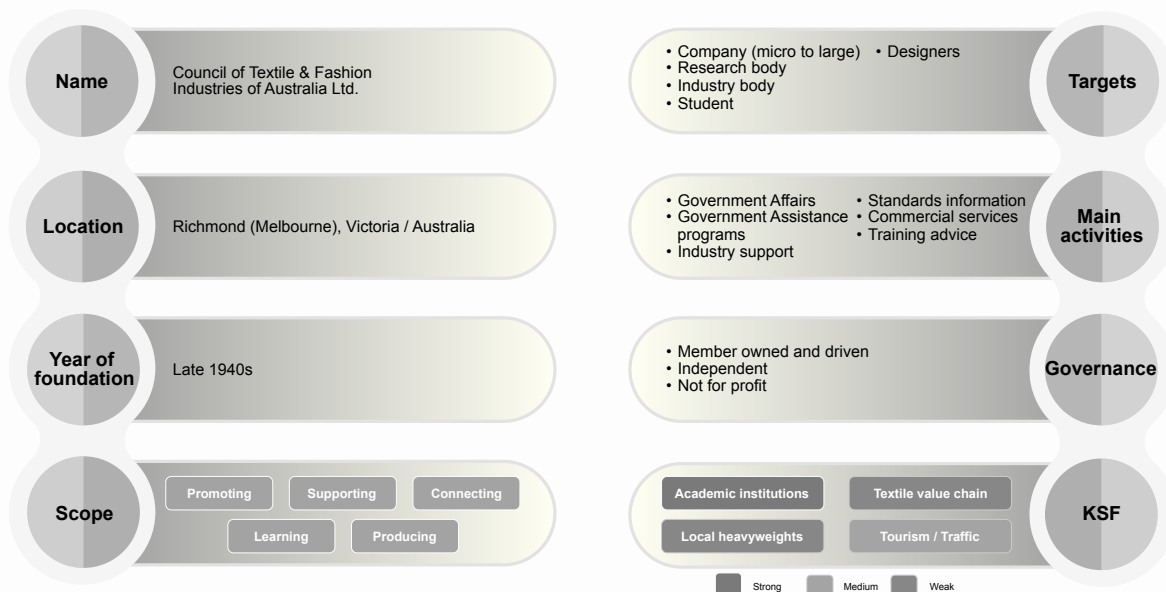


## A large palette of services supporting members

	TFIA	DENIM CITY	ITM	Danish Fashion Institute	FLANDERS FASHION INSTITUTE	tfi Toronto Fashion Institute	mmode	CTFC	Swedish Fashion Council	MANUFACTURE NEW YORK
05 Promoting	✓	✓	✓	✓	✓	✓	✓	✓	✓	
04 Supporting	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
03 Connecting	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
02 Learning	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
01 Producing	✓	✓		✓		✓				✓



## - Snapshot -



# 1 TFIA

## - Facts and figures -

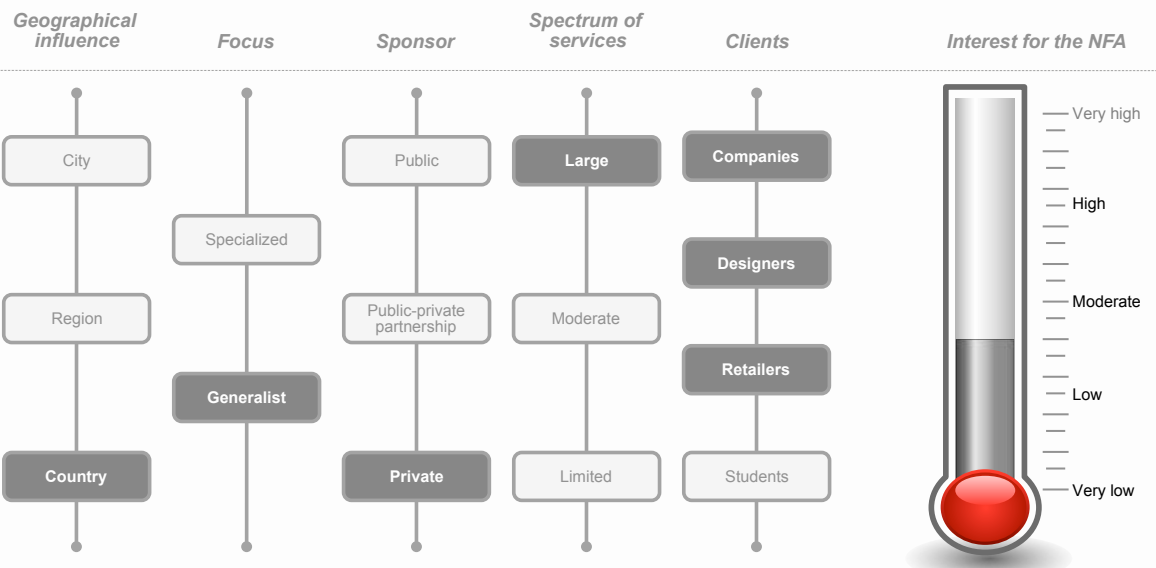
[...The TFIA estimates that the entire fashion and clothing supply chain - including manufacture, wholesale and retail - contributes US\$20 billion to the national economy and the sector employs 200,000 people...]

[...Australian fashion is in a unique position, with approximately 85% of its industry representation being SMEs. As a cohort of enterprises, they are spread across the nation, often working in isolated pockets...]

[...Only two international brands, i.e. Billabong and Rip Curl coming from the surf universe...]

# 1 TFIA

## - Profile -

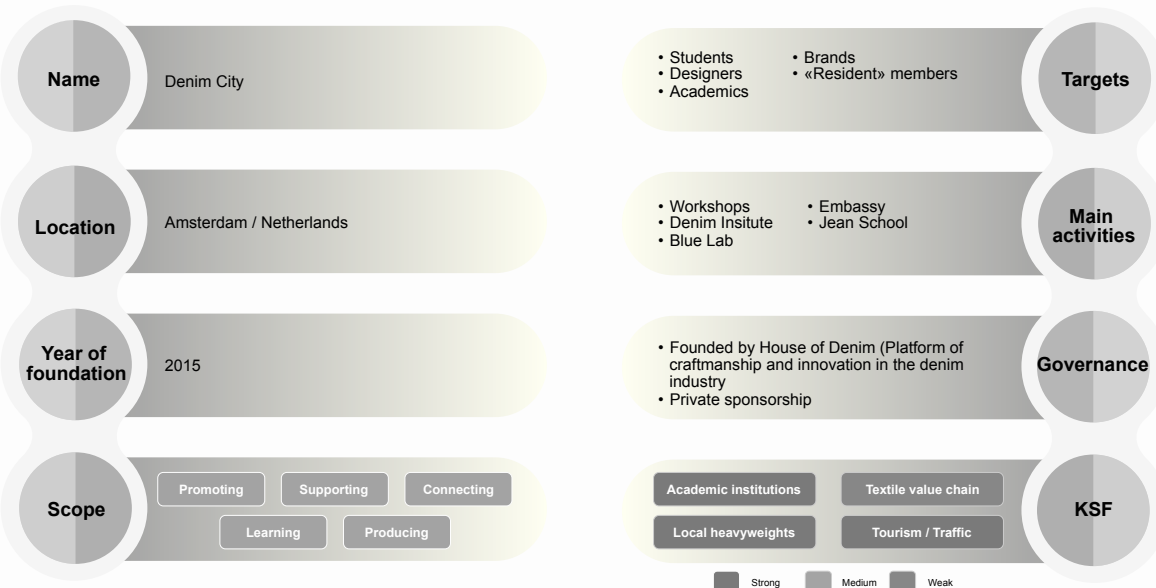




## - Range of services -



## - Snapshot -





## - Snapshot -

“ **Amsterdam is not a fashion capital;** that's one ambition we are unlikely to fulfil for a long time to come. But the denim capital? No doubt about it. As soon as fashion designers have made their mark – take Viktor & Rolf or Iris van Herpen, for example – they soon leave us to go abroad. But with the denim industry, it is exactly the opposite. And that's our strength ”



*Chairperson of lobby group House of Denim, Mariette Holtink*

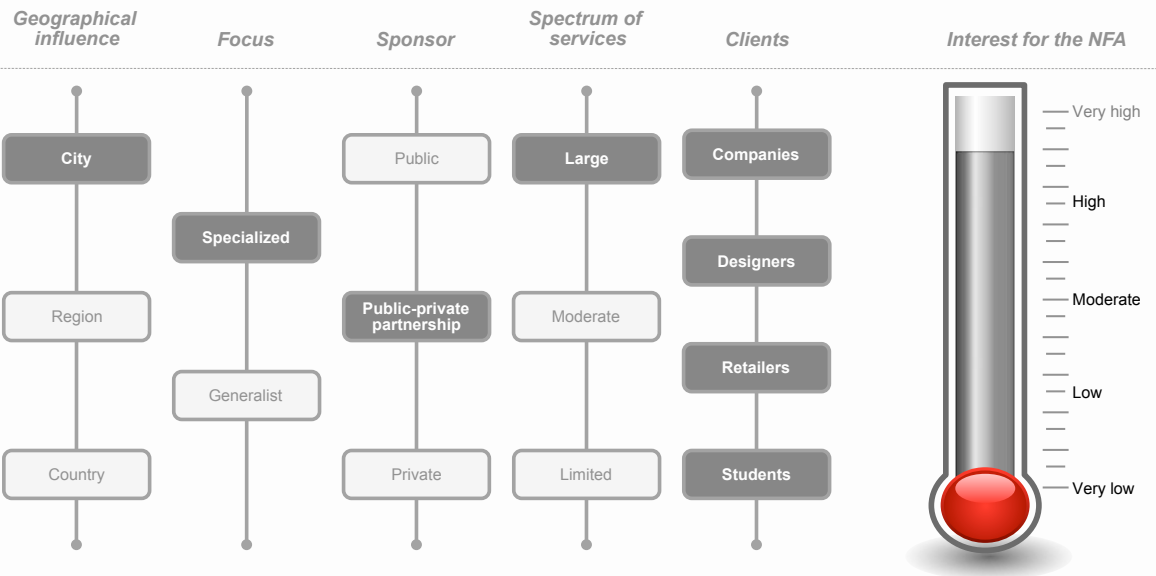


## - Facts and figures -

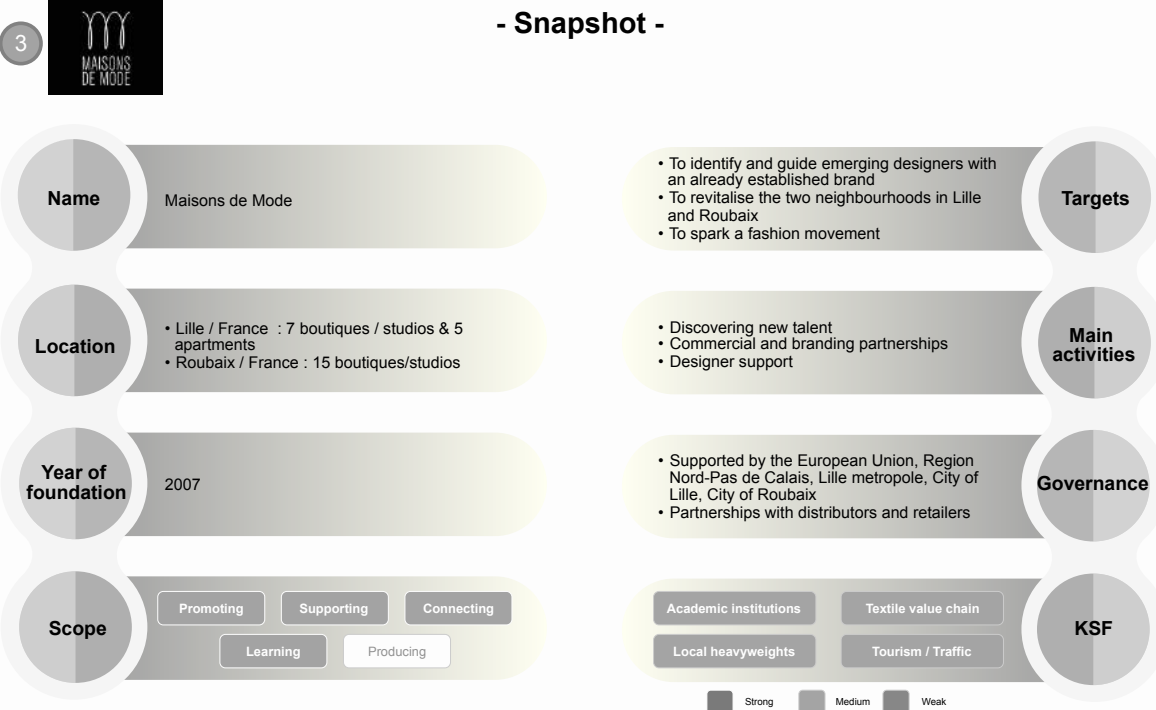
[...Statistics Netherlands (CBS) reports that, in 2009, a total of 4,670 designers were employed in various design fields, including fashion, interior design, furniture design and graphic design...]

[...Dutch creative industries employed about 172,000 people. 66% of these are self-employed. The annual turnover of Dutch creative industries is € 7.1 billion, representing 1.9% of the Dutch economy...]

[...Total turnover for companies affiliated with MODINT, is 9 billion euros, of which, 45 per cent is derived from export (2010). Some 25 percent of this export goes to Germany...]

**- Profile -****- Range of services -**





## Roubaix : A former capital of textile manufacturing facing the challenge of industrial reconversion



3



## - Facts and figures -

[...In 30 years, regional direct employment in the textile industry decreased from 150,000 to 30,000; 40% work in the technical textiles segment...]

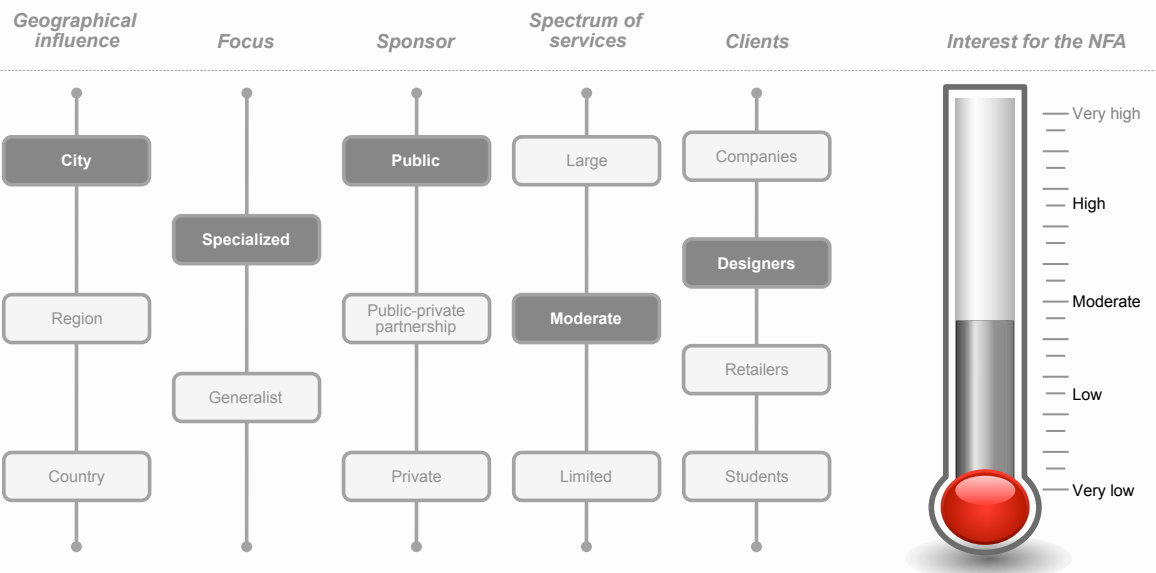
[...The Nord-Pas-de-Calais concentrates the headquarters of 12 (out of a total of 30 in France) mail-order French companies and 11 leading textile chains...]

[...Strong academic networks consisting of several reputed schools and universities in textile, arts and design with an average of 800 students in the different structures...]

3



## - Profile -



3



## - Range of services -

01

**Discovering new talents**

- Target established labels and « jeunes pousses (green shoots) »
- Professional assistance for 24 months
- Every year, a prize of €25,000 is awarded to the most promising designer at the 48h Maisons de Mode event

02

**Commercial and branding partnerships**

- Wide network of fashion, textile and distribution actors with whom Maison de Mode has built partnerships
- promote and encourage the creation of true designer labels made in the north of France
- Creations have been sold through online and mail-order retailers and have been available for purchase through department stores
- Special capsule collections with retailers

03

**Designer support**

- Boutique/studios at nominal rents, in addition to housing
- Mini-design studios (for the jeunes pousses) in the Jardin de Mode (Lille Sud)
- Pop-Up shops available to designers for 2- to 3-month stints
- Professional assistance and training in pattern-making and prototyping by expert pattern- and model-makers
- Searching for financing
- Business and technical coaching + training
- Support in sourcing, production and marketing and training
- Connections to professional and industry networks
- Public relations and communications assistance
- Online social networking
- Financial assistance for trade fairs in France and abroad
- Widely publicised, popular events such as the Marché des Modes (fashion bazaar), 48h Maisons de Mode (fashion marathon), the Nuit des Soldes (sales night) and the Vide-Dressing Maisons de Mode (closet clear-out exchange)

4  
Danish  
Fashion  
Institute

## - Snapshot -

**Name**

Danish Fashion Institute A/S (DAFI)

**Location**

Copenhagen / Denmark

**Year of foundation**

2005

**Scope**

Promoting Supporting Connecting  
Learning Producing

**Targets**

- To facilitate an extensive network to develop, promote, market and push Danish fashion forward in order to strengthen Denmark's position on the global fashion map

**Main activities**

- To facilitate an extensive network to develop, promote, market and push Danish fashion forward in order to strengthen Denmark's position on the global fashion map

**Governance**

- Danish Fashion Institute is a commercial foundation with support from a union of members named DAFI's Netværk

**KSF**

Academic institutions Textile value chain  
Local heavyweights Tourism / Traffic

Strong Medium Weak

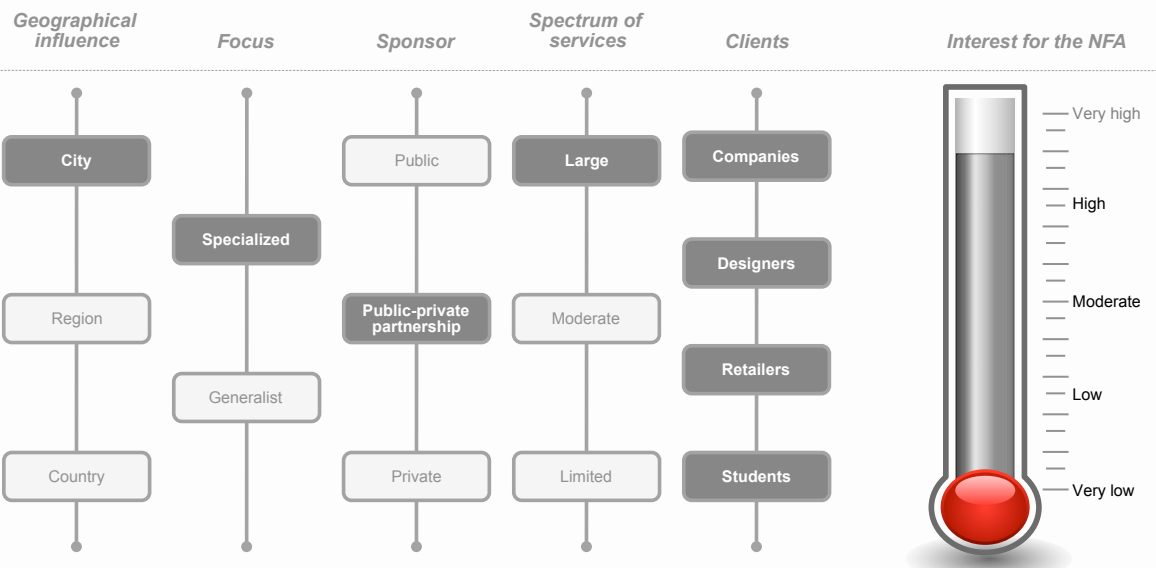
## - Facts and figures -

[...From 2012 to 2013 the total turnover in the fashion industry rose – excluding retail sale – with 0.3 percent to nearly US\$ 6 billion...]

[...Danish fashion industry's top three export countries are Germany, Sweden, and Norway, which combined equals half of the fashion export...]

[...Combined export makes up nearly 60 percent of the Danish fashion industry's turnover and in cash that amounts to US\$ 3,6 billion in 2013...]

## - Profile -



#### 4 Danish Fashion Institute

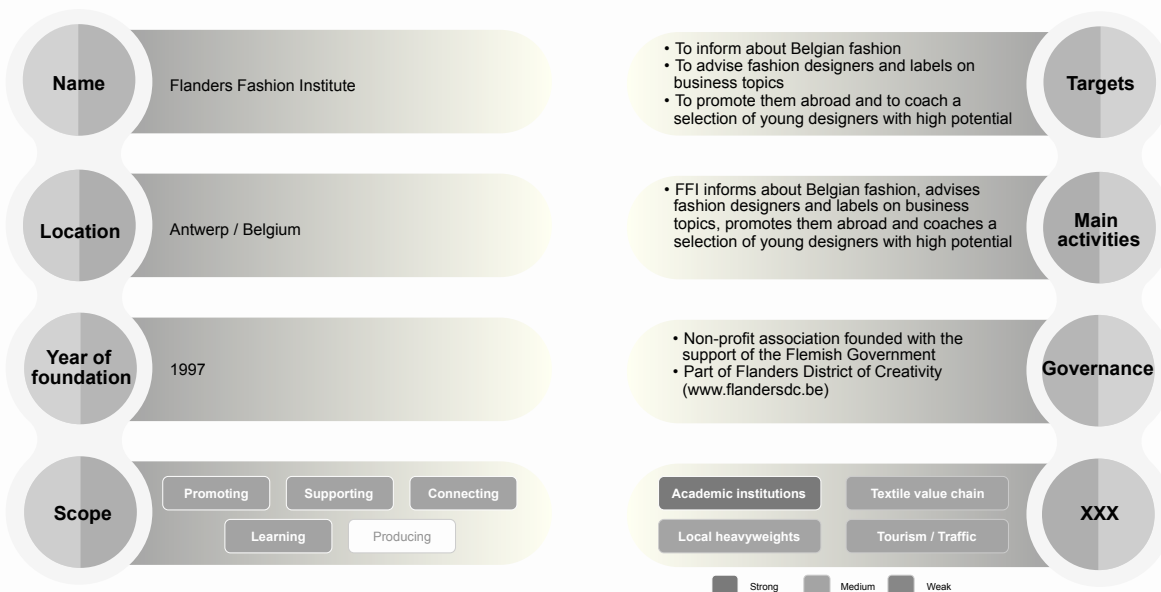
#### - Range of services -

*Presented in section #4*

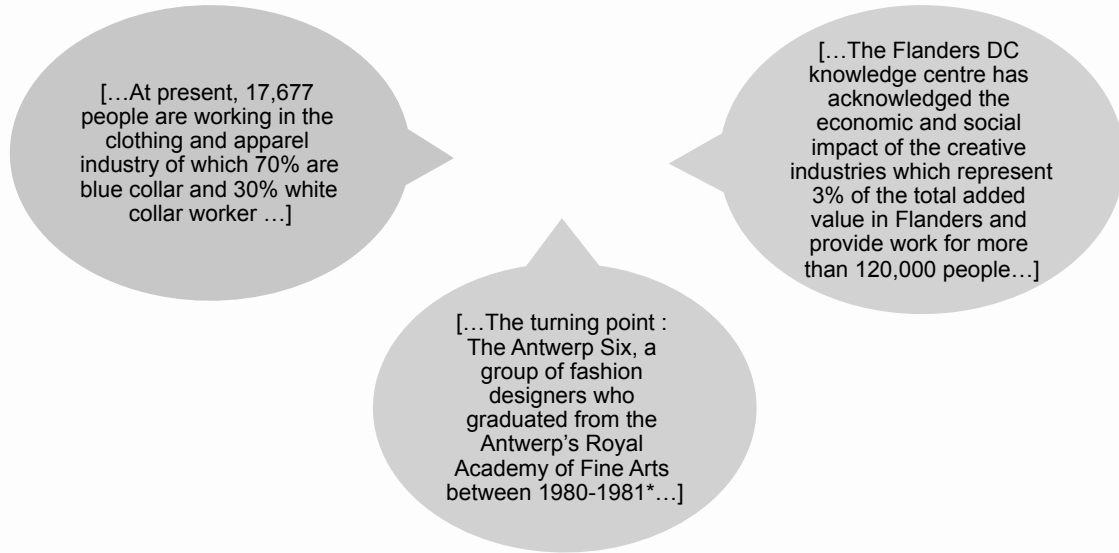


#### 5 FFI FLANDERS FASHION INSTITUTE

#### - Snapshot -

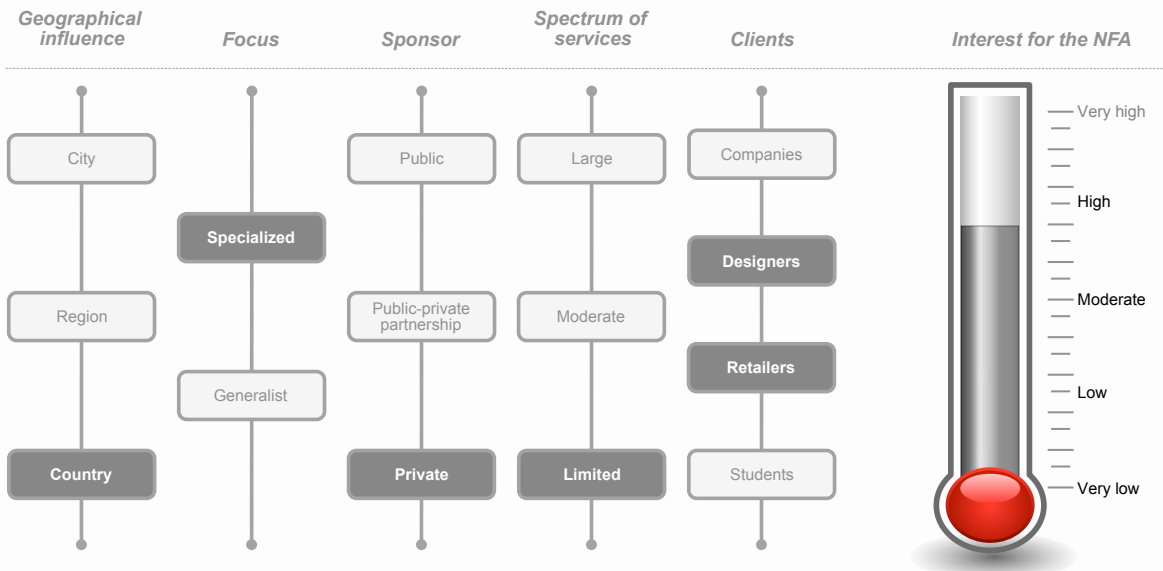


## - Facts and figures -



\*Walter van Beirendonck, Ann Demeulemeester, Dries van Noten, Dirk Van Saene, Dirk Bikkembergs, Marina Yee

## - Profile -



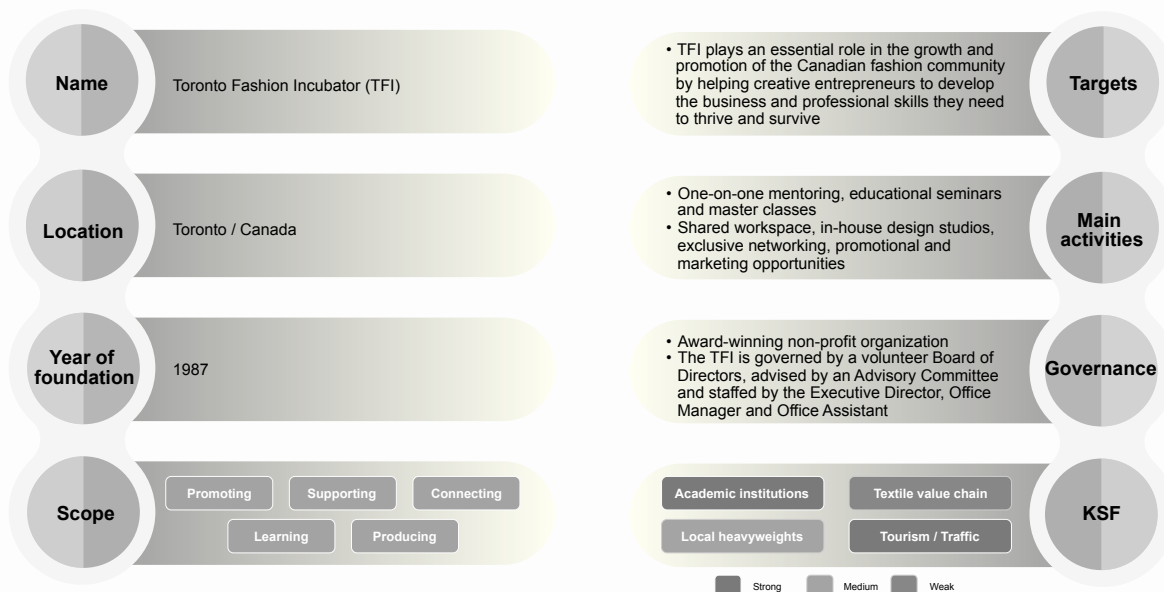
5 **FFI** FLANDERS FASHION INSTITUTE

## - Range of services -



6 **tifi** toronto fashion incubator\*

## - Snapshot -







## - Facts and figures -

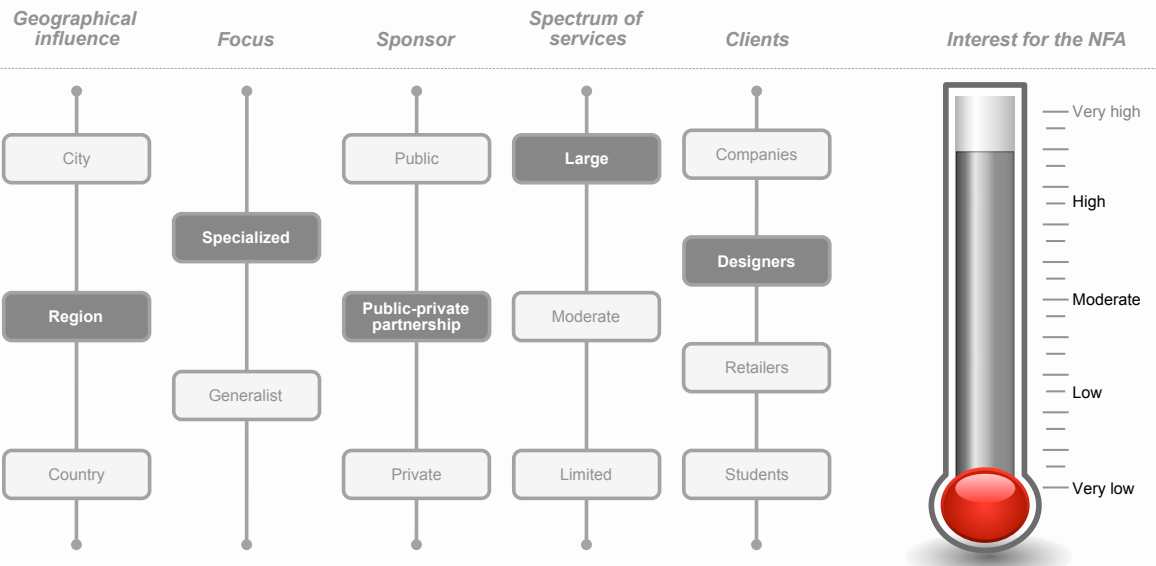
[...<500 apparel manufacturers and 40,000 employees...]

[...The list of Canadian fashion talent situated abroad seems almost endless and includes the likes of the industry icons like DSquared; Erdem; Alfred Sung; Jason Wu and CFDA award-winning Imran Ahmed....]

[...Torontonians consumers spend a total of \$3,816 per household on clothing each year which adds up to US\$ 5.8 billion a year of Canadian money spent on apparel...]



## - Profile -

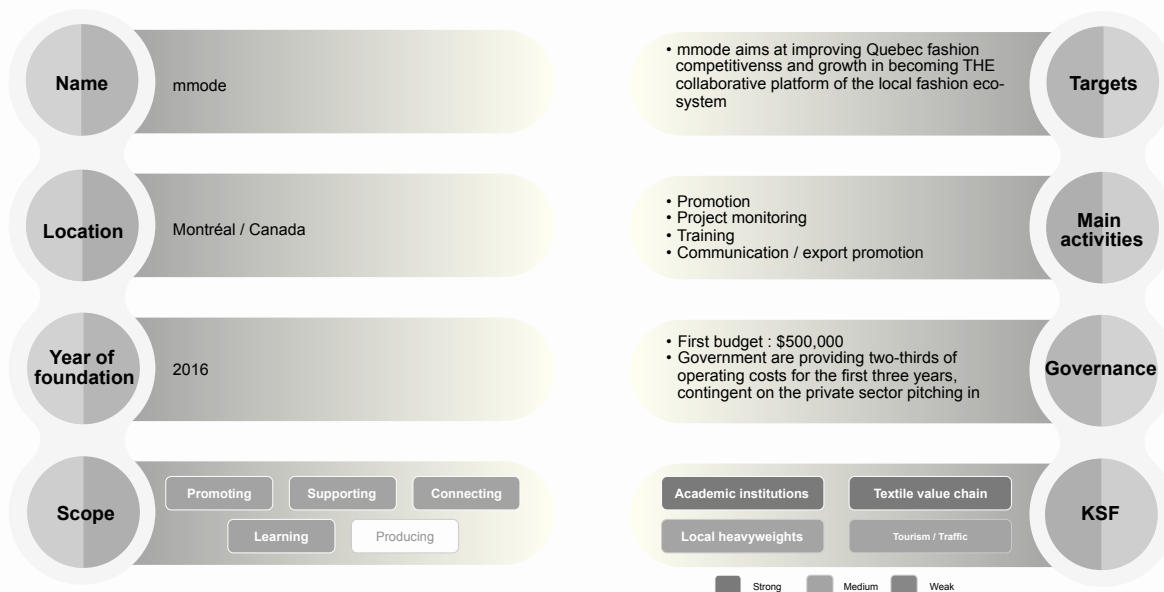




## - Range of services -



## - Snapshot -



## 7 mmode

LA GRAPPE MÉTROPOLITAINE DE LA MODE

### - Facts and figures -

[...The fashion industry, though fragile, still accounts for 30,000 jobs in Quebec (40,000 employees in 2004), and 45 per cent of all employment in the Canadian fashion sector. And Montreal is still the No. 3 centre in North America for clothing manufacture....]

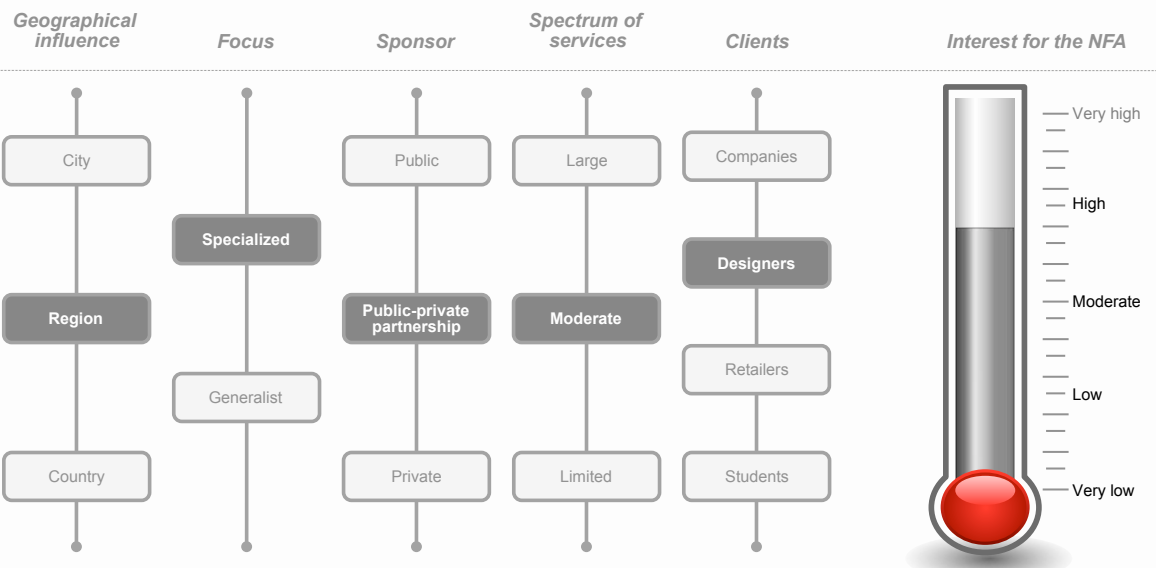
[...In 2012, the Quebec fashion industry was worth \$7.6 billion in sales. Export figures are precipitous: in 2004, Quebec exported \$1.6 billion worth of goods, more than 90 per cent to the U.S., dropping to \$600 million in 2008 and \$500 million in 2011....]

[...4 international leading giants, i.e. Aldo, Gildan, Logistik Unicorn, Peerless...]

## 7 mmode

LA GRAPPE MÉTROPOLITAINE DE LA MODE

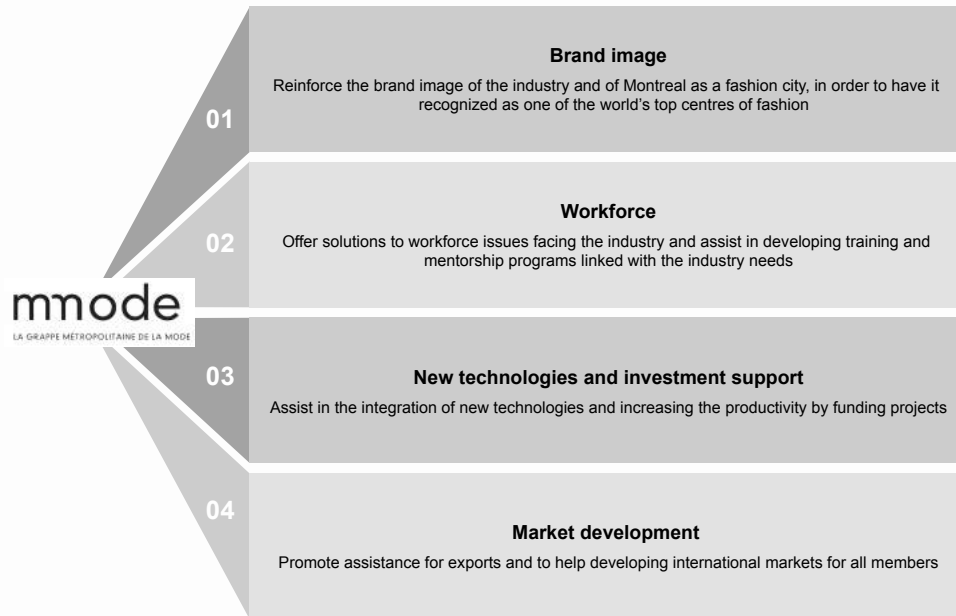
### - Profile -



## 7 mmode

LA GRAPPE MÉTROPOLITAINE DE LA MODE

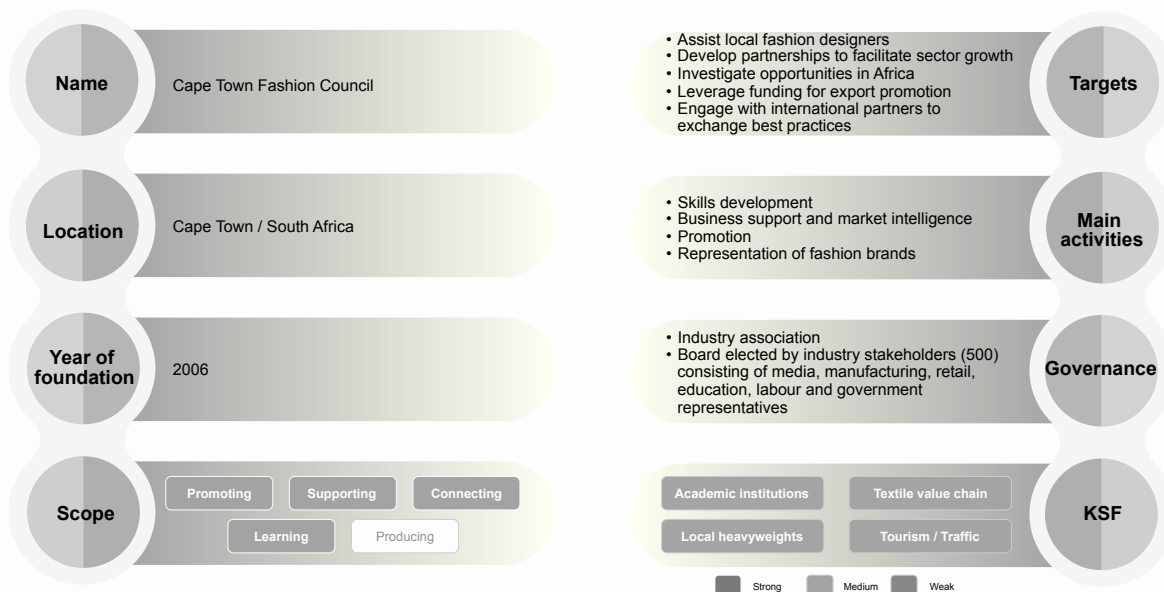
### - Range of services -



## 8 CT|FC

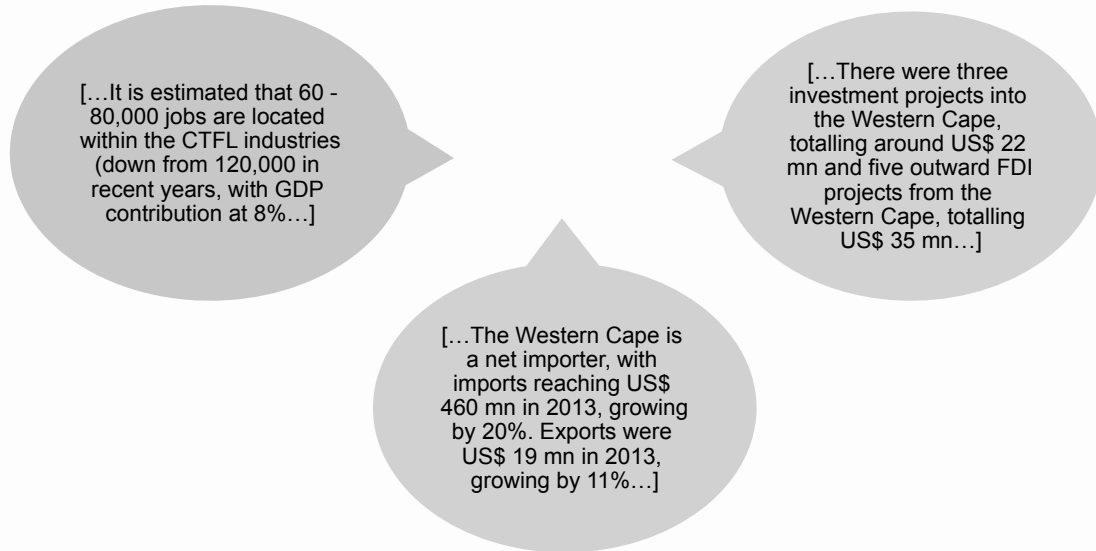
CAPE TOWN FASHION COUNCIL

### - Snapshot -

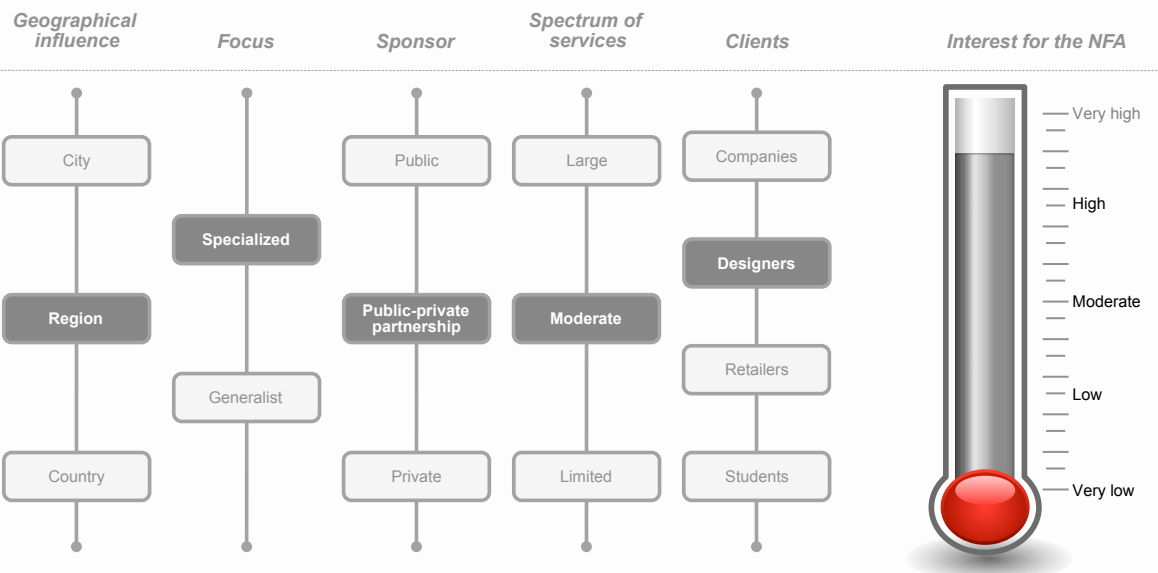




## - Facts and figures -



## - Profile -

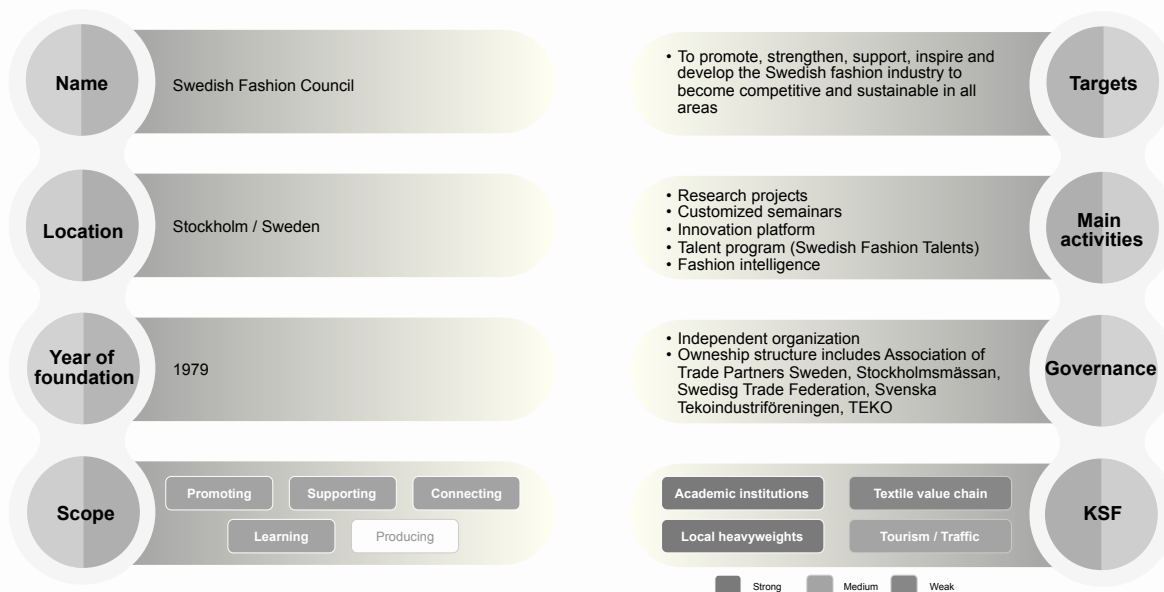




## - Range of services -

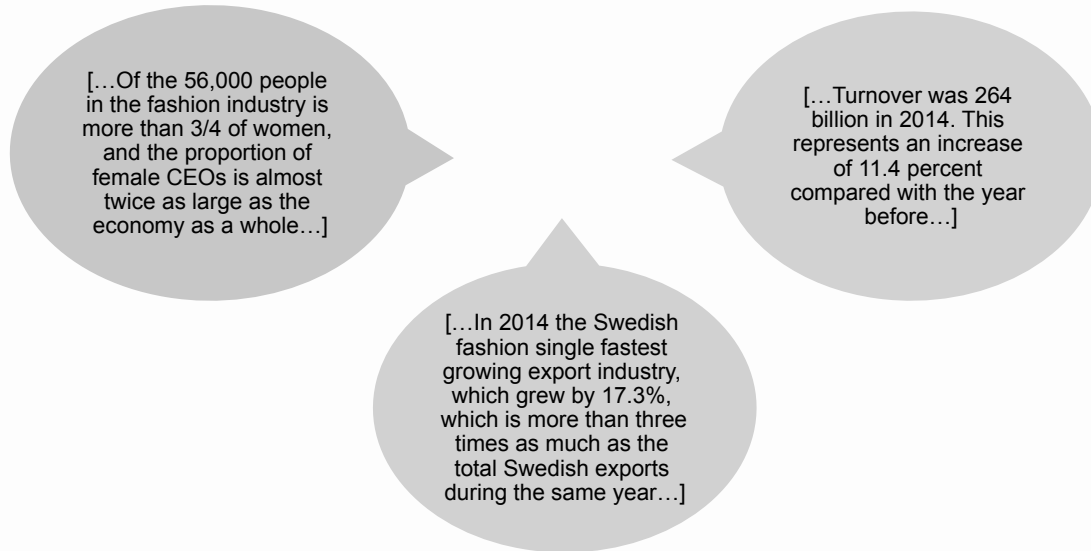


## - Snapshot -

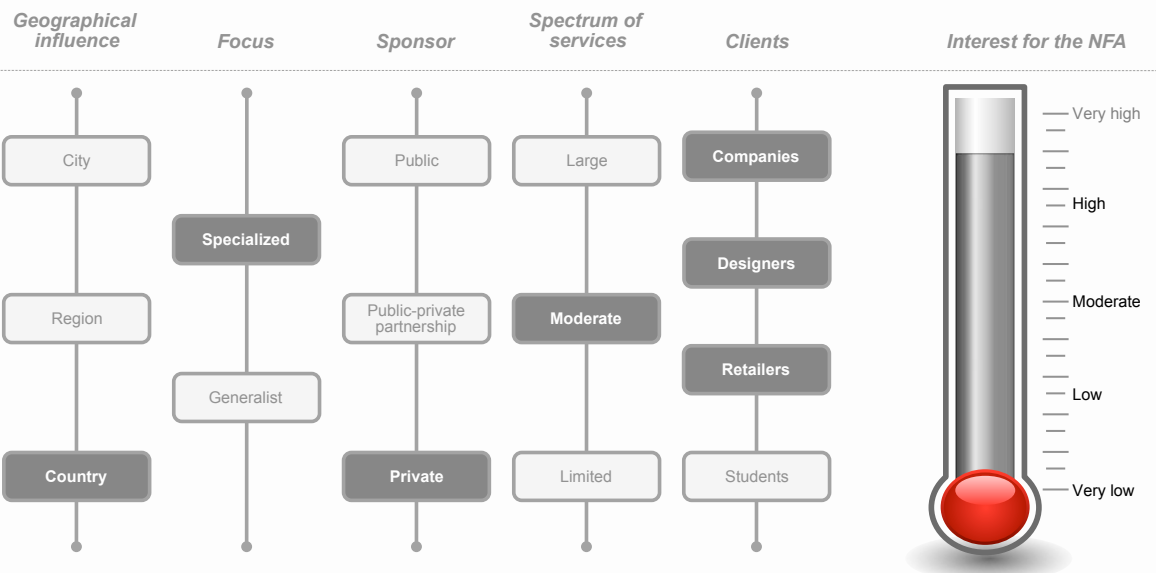




## - Facts and figures -



## - Profile -







## - Range of services -



01

### Projects

- Ethical charter : The "Ethical Charter" seeks to create fair conditions for models and to promote healthy body ideals
- Fashion Hackathon : o solve social or everyday problems through digital couture
- Fashionomics : A tvodd by Swedish Fashion Council in collaboration with Veckans Affärer.
- Frontrow Forensics :The purpose is, with the help of video technique and digital analysis, to create a more sustainable and resource effective production process in the fashion business.
- Swedish Fashion Talents : to support new fashion brands in their establishment on the market. The talent program is carried out with the help of projects, networks and activities, for example fashion shows and exhibitions.

02

### Reports

- Business intelligence : lectures about norms and values, new consumption patterns, digitalization, sustainability and new business models
- Inspiration and fashion guide : The material "Inspiration" contains the overall tendencies in our surrounding world and references to fashion, food, decoration and lifestyle as well as new consumption patterns
- Trend reports : The report is a brief summary of specific events in fashion, lifestyle and interior design that is published 15-20 times every six month. It includes everything from updates on fashion weeks, exhibitions, and fairs, to art and culture events.

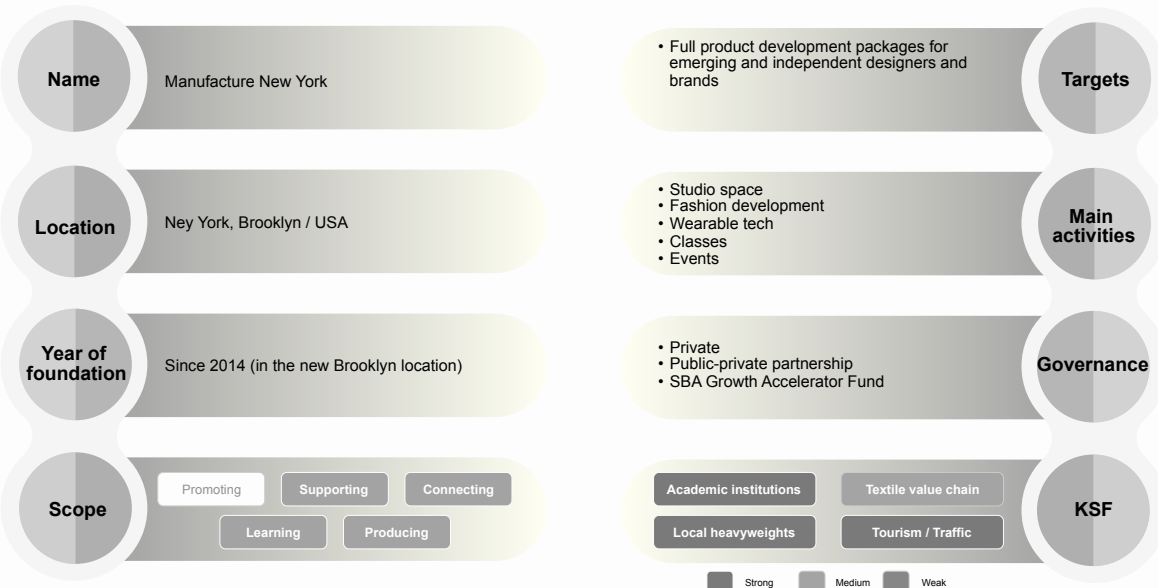
03

### Publications and consultation

- "Fashion Business News" is Swedish Fashion Councils periodic news summary that provides a summary of the most important business news about companies, persons, positions and development in the business. (Included in every issue is an interview with leading business actors about their view on the business.)
- The consultation takes place according to the needs and desires of the company, individual meetings, lectures, seminars or workshops. Topics can include, how lifestyle affects us, market and media trends or customer analysis, to name a few
- Swedish Fashion Council's newsletter is sent out once a month and contains news from the company as well as interesting events in the fashion industry. You will also find various tips about exhibitions, shops and other interesting information. Are you curious about how a newsletter might look?



## - Snapshot -



## 10 MANUFACTURE NEW YORK

### - Facts and figures -

[...According to NYCEDC\*, the fashion industry employs more than 180,000 people in New York City, approximately half of them work in retail ...]

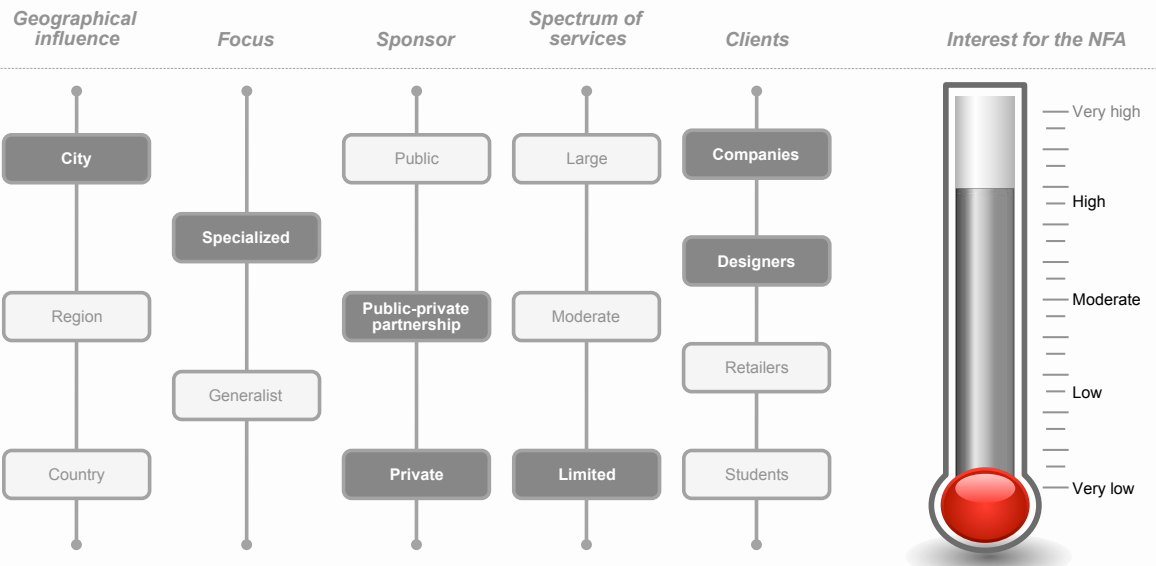
[...The industry pays nearly \$11 billion in wages and generates almost \$2 billion in tax revenue each year ...]

[...An estimated 900 fashion companies have their headquarters in New York City and the city is the largest retail market in the country, generating more than \$15 billion in annual sales...]

\*New York City Economic Development Corporation

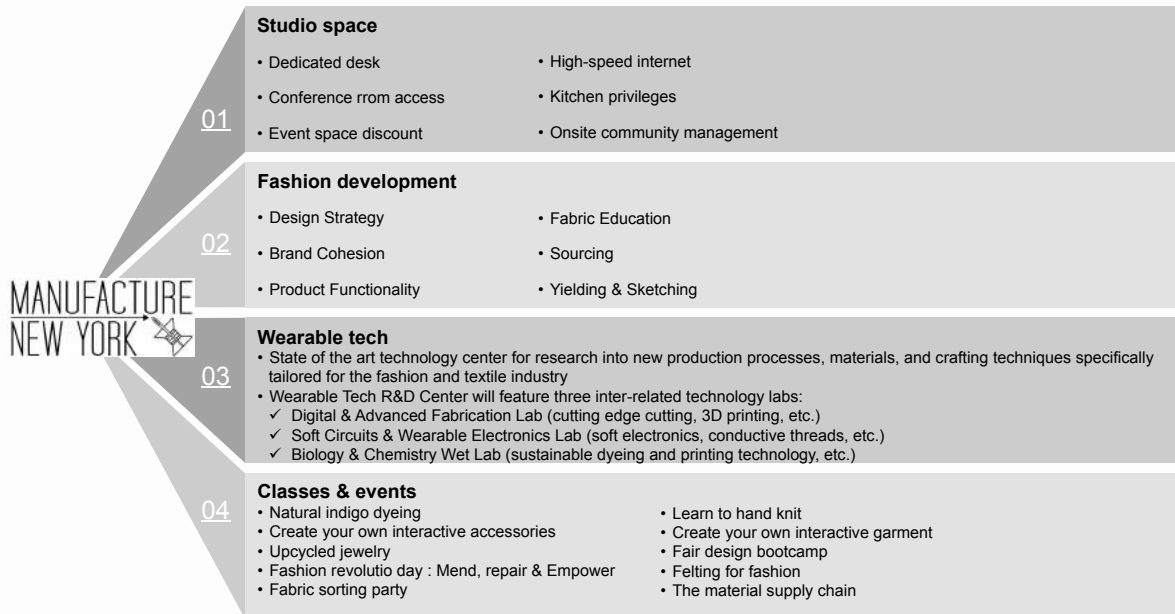
## 10 MANUFACTURE NEW YORK

### - Profile -





## - Range of services -



## Other interesting initiatives

	Nova Fashion Incubator	Halifax, Canada	<a href="http://www.novafashionincubator.ca/">http://www.novafashionincubator.ca/</a>
	Council of Fashion Designers of America	New York, NY, USA	<a href="http://cfda.com/programs/cfda-fashion-incubator">http://cfda.com/programs/cfda-fashion-incubator</a>
	Hawaii Fashion Incubator	Honolulu, Hawaii, USA	<a href="http://www.hawaiifashion.org">http://www.hawaiifashion.org</a>



# AGENDA

01

Fashion clusters : 10 case studies around the World

*From whom could we be inspired?*

02

**Best practice : Top-notch services and projects**

*Which initiatives could be adapted to the NFA context?*

03

New trends in the textile scene

*What should be carefully looked at?*

Project Nr. 4367

02

## **Best practice : Top-notch services and projects**

### **4.1 Snapshot of 28 projects**

### 4.2 Summary matrix

## Snapshot of 28 projects

TFIA	DESIGN CITY	M	Danish Fashion Institute	FFI	tfi	Swedish Fashion Council	MANUFACTURE NEW YORK
1 QR Code Pop-Up Window	3 Jean School	5 48h Maisons de Mode	7 Global Fashion Exchange	20 Fashion Award	23 Meet & Mingle Night	24 Fashion Talents	27 Co-working & flex space
2 Manufacturing space	4 Blue Lab	6 Pop up stores	8 Copenhagen Fashion Week	21 Bridging the Gap		25 Fashion Hackaton	28 Product development
			9 Fashion Week Festival	22 Fashion Talks		26 Frontrow Forensics	
			10 NICE				
			11 Fashion Summit				
			12 DAFI Tuesday				
			13 FAFI Academy				
			14 Ethical charter				
			15 Fabric Source				
			16 Fashion Forum				
			17 Fashion Friday				
			18 Matchmaking				
			19 Min Historie				

X

## Snapshot of 28 projects

**1 Sponsor**

TFIA / Australia

**Focus**

Promoting ☒

Supporting ☐

Connecting ☒

Learning ☐

Producing ☐

**QR<sup>1</sup> Code Pop-Up Window Project**

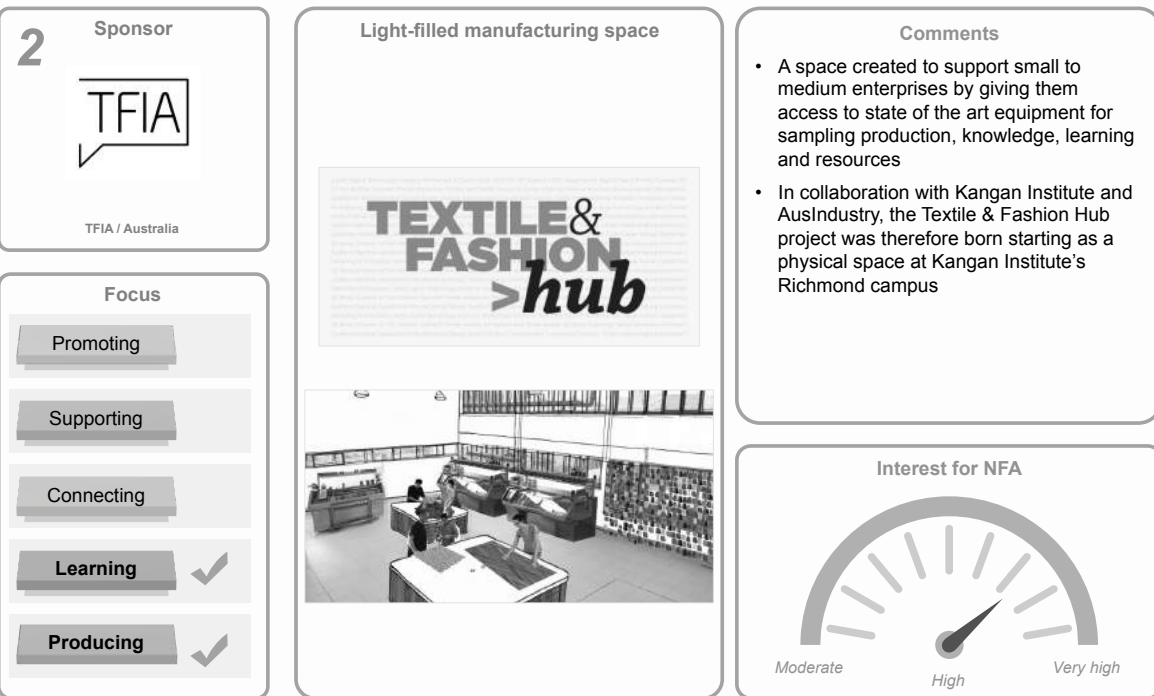
<sup>1</sup>Quick Response

**Comments**

- The QR Code Pop-Up Window Project started off with the Design Cluster
- Introduced in the Little Lonsdale in the legal district in the city of Melbourne and put a digital display in the window of a café, and generated interest around the sign
- Total cost : About US \$350.-
- Joint effort implemented with several designers (shoes, accessory, garment, etc.)

**Interest for NFA**

Moderate High Very high



## List of equipment

Knit	Digital print	Bodyscanner	CAD
<ul style="list-style-type: none"> <li>• STOLL CMS 530 HP Multi Gauge 6.2 Knitting Machine + MACH1 software</li> <li>• STOLL CMS 822 HP Multi Gauge 6.2 Tandem Knitting Machine + MACH1 software</li> <li>• SHIMA SEIKI WHOLEGARMENT MACH2S Flat Knitting Machine M183S 14 Gauge + SDS Apex3 software</li> <li>• COMPLETT Linking Machine and Cup Seamer, PEGASUS 852 Overlocker, PFAFF 1163 Plain Sewer</li> <li>• SIMET 2-Cone Winder, Scales to weigh to the gram, MONTI Antonio Model 100 Steam Press</li> <li>• MIELE Washing Machines (W500 WPS &amp; W5741) &amp; Tumble Dryers (T8000 WP &amp; T8827 WP) kindly donated by MIELE our official partner</li> </ul>	<ul style="list-style-type: none"> <li>• ROLAND XJ640 Digital Printer, Spectrometer and Ergosoft RIP software</li> <li>• BROTHER GT514 Digital Garment Printer &amp; Garment Label Printer</li> </ul>	<ul style="list-style-type: none"> <li>• SPACEVISION Cartesia Portable 3D Body Scanner BS02-C4T + software</li> </ul>	<ul style="list-style-type: none"> <li>• Fully equipped CAD room</li> <li>• N-HEGA Scanner/Digitizer</li> <li>• MACs and PCs with the latest StyleCAD software</li> </ul>

## Sponsor



Denim City / Netherlands

## Focus

Promoting ✓

Supporting ✓

Connecting ✓

Learning ✓

Producing ✓

## Denim City



## Comments

- Denim City is a center for craftsmanship and innovation in the denim industry
- Like its logo, Denim City consists of five elements:
  1. A denim craftsman's workshop;
  2. An institute for developing and sharing knowledge, with its own archive;
  3. The Blue Lab, a sustainable laundry innovation center;
  4. The Embassy, space for networking and enterprise;
  5. An education facility for Jean School and its international course

3

## Sponsor



House of Denim / Netherlands

## Focus

Promoting

Supporting

Connecting

Learning ✓

Producing

## Jean School



## Comments

- The Jean School is an initiative of James Veenhoff (former director and initiator of the Amsterdam Fashion Week) and Mariette Hoitink (owner HTNK Fashion recruitment & consultancy). In 2009, Veenhoff and Hoitink started the foundation House of Denim
- In addition to the Dutch education, the Jean School in cooperation with House of Denim, recently started a one-year English-speaking education that is especially developed for foreign students and Dutch students with a HAVO-diploma or who have a propaedeutic certificate.

## Interest for NFA





**4** Sponsor



Denim City / Netherlands

Focus

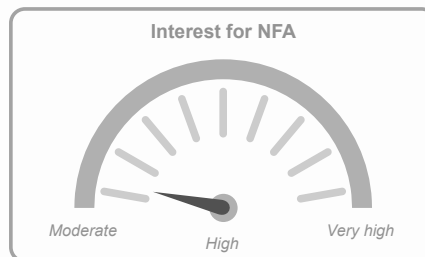
- Promoting
- Supporting
- Connecting
- Learning
- Producing ☒

Blue Lab



Comments

- Blue Lab Amsterdam is powered by a consortium of denim industry leaders in order to develop new, cleaner and innovative recipes for denim industry
- Denim City is founded as a non-for-profit organisation by 'House of Denim Foundation' aiming to bring together brands, students, academics and industry to take the industry "towards a brighter blue"
- Denim City consist of education facilities, craftsman's workshop, an archive, an expertise center and a networking space with offices and workspaces



**5** Sponsor



Maisons de Mode / France

Focus

- Promoting ☒
- Supporting
- Connecting
- Learning
- Producing

48h Maisons de Mode



Comments

- Annual event created eight years ago by Maisons de Mode
- 3 days of fashion shows, catwalks, designers' discount sales, Special prizes, exhibitions, relooking, music, DJ set, studio photo, street style casting, beauty bar, street-style, DIY workshops, Glam Run & tattoo, etc.
- Approx. 19,000 visitors during the last 2015 edition



6

Sponsor



Maisons de Mode / France

Focus

Promoting



Supporting



Connecting

Learning

Producing

Pop up stores



Comments

- Lille : 7 boutique/studios & 5 apartments. In The Jardin de Mode, a renovated former cinema featuring six design studios for jeunes pousses (green shoots), a patternmaking studio, an events space and a designer boutique
- Roubaix : 7 seven boutiques & 8 in the heart of Le Vestiaire which is a huge, loft-like space. This space features Maisons de Mode designer boutiques as well as pop-up stores and Le LaboM, a bar-restaurant run by La Maison Meert. Last but not least, Le Vestiaire also houses a fashion and design collective : Le Grand Bassin.

Interest for NFA



7

Sponsor

Danish Fashion Institute

DAFI / Denmark

Focus

Promoting

Supporting

Connecting



Learning



Producing

Global Fashion Exchange



Comments

- Founded in 2013
- To access the GFX, you must contribute a minimum of one clean, gently-used garment. After making the contribution, your item will go into the common pool of clothing, and in exchange you will be able to select any garments you desire at no cost
- A Danish initiative to promote sustainable consumption and empower consumers to take actions for a better environment while they renew their wardrobe
- At launch, 1,500 people swapped 5.2 tons of clothes, and, in the process, a great concept was born

Interest for NFA



8

## Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

## Focus

Promoting ✓

Supporting ✓

Connecting ✓

Learning

Producing

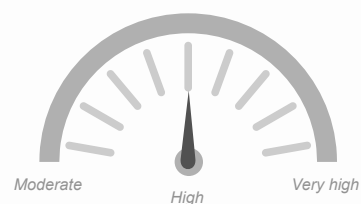
## Copenhagen Fashion Week



## Comments

- To market Copenhagen internationally as an important fashion destination and attract exciting design companies, buyers, and media to town – positioning Copenhagen Fashion Week as the Fashion Capital of Scandinavia
- Biggest project of DAFI, but soon grew so large that it was separated into a subsidiary
- Creation of an umbrella organization with the purpose of gathering, supporting, and facilitating shows, events, and other activities during fashion week
- 45 runway shows each fashion week

## Interest for NFA



9

## Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

## Focus

Promoting ✓

Supporting

Connecting ✓

Learning

Producing

## Fashion Week Festival



COPENHAGEN  
FASHION  
WEEK  
FESTIVAL

## Comments

- Contribute to making the city buzz with liveliness and opportunities, also for visiting buyers and members of press who visit Copenhagen for fashion week
- Simultaneous to the fashion week
- Launched in 2008 / open to the public
- Collaboration with Wonderful Copenhagen and Kobenhavns City Center
- More than 200 open activities in Copenhagen's streets and stores and museums, including shopping events, special exhibitions, concerts, fashion shows, and parties
- Own channels of communication, including a magazine, website, mobile app, social media and outdoor marketing

## Interest for NFA



10 Sponsor

Danish Fashion Institute

DAFI / Denmark

#### Focus

Promoting

Supporting ✓

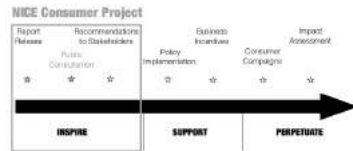
Connecting

Learning ✓

Producing

#### NICE – Nordic Initiative Clean & Ethical

**The Road to Sustainable Fashion Consumption is long...**



The NICE Consumer project occurs during the first phase of this roadmap.

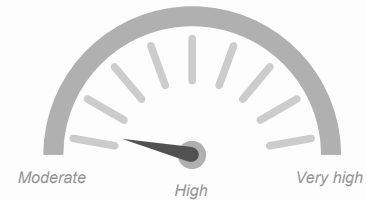


#### Comments

- NICE – Nordic Initiative Clean & Ethical – is a pan-Nordic project whose primary purpose is to motivate and support fashion companies in integrating practices of sustainability and social responsibility in their businesses to the benefit of people, the environment, and profit
- It is the first time the Nordic fashion industries have worked on a common project with a global perspective, and the background is simple :

« A unified vision of assuming responsibility of the sustainability agenda, and actually make a difference »

#### Interest for NFA



11 Sponsor

Danish Fashion Institute

DAFI / Denmark

#### Focus

Promoting

Supporting

Connecting ✓

Learning

Producing

#### Copenhagen Fashion Summit

**COPENHAGEN FASHION SUMMIT**  
12 MAY 2016



#### Comments

- A nonprofit event organised by Danish Fashion Institute on behalf of Nordic Fashion Association
- World's biggest conference on sustainability and fashion
- First Fashion Summit held in 2009 during the UN Climate Change Conference – COP15 – in Copenhagen, and again in spring 2012 and 2014 and 2016
- Next edition on May
- More than 1,200 participants from 27 countries

#### Interest for NFA



12 Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

## Focus

Promoting

Supporting

Connecting

Learning ✓

Producing

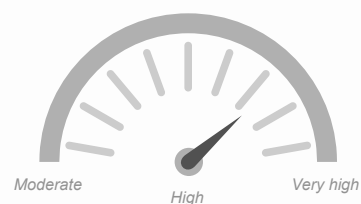
## DAFI Tuesday



## Comments

- Morning meeting that take place once or twice a month, in which fashion companies get practical and concrete knowledge on a variety of subjects
- Presentations and discussions are kept at a comprehensible level, and the purpose is for participants to walk away with new knowledge that can be shared within the company and implemented there

## Interest for NFA



13 Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

## Focus

Promoting

Supporting

Connecting

Learning ✓

Producing

## DAFI Academy



Dafi/Academy

## Comments

- DAFI Academy is an "extended" DAFI Tuesday
- Where DAFI Tuesdays last one hour, DAFI Academy features half- or whole-day courses, giving participants the chance to delve further into a given topic or challenge relevant to the fashion industry
- For each course, DAFI invites several experts to address the topic du jour

## Interest for NFA





14 Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

Focus

Promoting



Supporting

Connecting

Learning

Producing

Ethical charter



Comments

- To ensure the well-being of Danish models and to contribute to the creation of relevant and appropriate information about eating disorders and about the ideals the fashion industry is a part of creating
- Created in 2007 by the Danish Fashion Institute (DAFI) and Denmark's national association against eating disorders and self-harm (LMS)

Interest for NFA



X

15 Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

Focus

Promoting

Supporting



Connecting

Learning

Producing

Fabric source



Comments

- More than 2,000 sustainable fabrics from over 30 countries all year round
- Users have the possibility to place orders - individually or with other brands to gain better minimum volumes and prices. The exclusive collection of fabrics ranges from basic piece goods, innovative fabrics to trend based premier samples
- To provide all the necessary facilities for designers, purchasers, and other production stakeholders, such as fabric samples, inspiration swatches, colour books, professional textbooks and databases
- Joint initiative lead by the Danish Fashion Institute (DAFI), under Nordic Initiative, Clean and Ethical (NICE) in close collaboration with leading partners within the textile industry

Interest for NFA



16 Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

## Focus

Promoting

Supporting

Connecting ✓

Learning

Producing

## Fashion Forum

FASHION  
Forum

## Comments

- To create a virtual platform and place of gathering for the Danish fashion industry
- FashionForum is the Danish fashion industry's news portal with features, news, background articles, and job ads – updated every day
- Established in the spring of 2010 as a DAFI initiative with support from the Capital Region of Denmark and the Danish Business Authority
- Became in 2012 a self-funded project, which is formally owned by Copenhagen Fashion Week
- Every day, up to 9,000 readers at FashionForum.dk

## Interest for NFA



17 Sponsor

Danish  
Fashion  
Institute

DAFI / Denmark

## Focus

Promoting

Supporting

Connecting ✓

Learning

Producing

## Fashion Friday

Fashion  
Friday

## Comments

- Fashion Friday is the name of Danish Fashion Institute's Friday bar
- About four to six times a year, Danish Fashion Institute hosts a bar open to the entire fashion industry

## Interest for NFA





## 18 Sponsor

Danish Fashion Institute

DAFI / Denmark

### Focus

Promoting

Supporting

Connecting ✓

Learning

Producing

### Matchmaking



### Comments

- Speed-dating is the name for the format in which agents from markets abroad are flown in to Copenhagen to meet with Danish clothing labels
- The event is inspired by traditional speed dating, meaning that agent and company are matched beforehand
- On the day of the matchmaking, each participating brand gets a handful of 30-minute meetings booked with various potential agents. If all goes well, the groundwork is laid for agency collaboration
- A few days prior to the day of speed dates DAFI organizes a seminar on the market at hand, in which advisers familiar with market trends and agency collaborations make presentations

### Interest for NFA



## 19 Sponsor

Danish Fashion Institute

DAFI / Denmark

### Focus

Promoting

Supporting

Connecting

Learning ✓

Producing

### Min Historie







### Comments

- The lecture series Min Historie ("My Story"), in which strong personalities from the fashion industry share their knowledge and experience, has now been a regular event at Danish Fashion Institute for more than six years and has maintained its popularity with both DAFI members and students at the design schools and CBS
- « ...How do you gain success in the tough jewelry industry? This is something Søren Lynggaard knows of since he is CEO of the Danish jewelry company Ole Lynggaard Copenhagen... »

### Interest for NFA



<p><b>20</b> Sponsor</p> <p><b>FFI</b> FLANDERS FASHION INSTITUTE</p> <p>FFI / Belgium</p>	<p>Flanders Fashion Institute Award</p> 	<p>Comments</p> <ul style="list-style-type: none"> <li>The Flanders Fashion Institute Award was granted last June to the fourth year student at the Academy in Antwerp and KASK in Ghent whose collection shows commercial potential and stands out most for the FFI team</li> <li>The winners received a voucher worth half a day of portfolio screening and finetuning with Iris Ruisch, portfolio specialist at Dutch recruitment agency HTNK</li> </ul>
<p>Focus</p> <p>Promoting ✓</p> <p>Supporting</p> <p>Connecting</p> <p>Learning</p> <p>Producing</p>		<p>Interest for NFA</p>  <p>Moderate High Very high</p>

<p><b>21</b> Sponsor</p> <p><b>FFI</b> FLANDERS FASHION INSTITUTE</p> <p>FFI / Belgium</p>	<p>Bridging the Gap</p>  <p><i>To help designers acquire the necessary skills to professionally run a fashion company</i></p>	<p>Comments</p> <ul style="list-style-type: none"> <li>10 workshops in entrepreneurship to help designers acquire the necessary skills and competences to professionally run a fashion company (cost : US\$ 400)</li> <li>Topics include :             <ol style="list-style-type: none"> <li>1. Introduction of the Fashion Industry</li> <li>2. Creation and collection architecture</li> <li>3. Sales strategy</li> <li>4. Production &amp; Production planning</li> <li>5. Budgetting &amp; Financing</li> <li>6. Financial department</li> <li>7. International Press relations</li> <li>8. Export</li> <li>9. E-commerce &amp; social media strategy</li> <li>10. Business negotiations</li> <li>11. Project management</li> </ol> </li> </ul>
<p>Focus</p> <p>Promoting</p> <p>Supporting</p> <p>Connecting</p> <p>Learning ✓</p> <p>Producing</p>		<p>Interest for NFA</p>  <p>Moderate High Very high</p>

## 22 Sponsor



FFI / Belgium

## Focus

Promoting

Supporting

Connecting ✓

Learning ✓

Producing

## Fashion Talks



## Who made your clothes

What does sustainable style mean to you

#fashionflowe

How often do you wash your jeans

## HOW SLOW DO YOU GO

Do you want to wear clothes made out of bacteria

HOW MANY OF YOUR CLOTHES DON'T GET OUT OF YOUR CLOSET ONCE A MONTH

When is the last time you bought clothes you actually needed

What happens when your clothes are outworn

HOW OLD IS YOUR OLDEST PAIR OF SHOES

What do you do when there's a hole in your socks

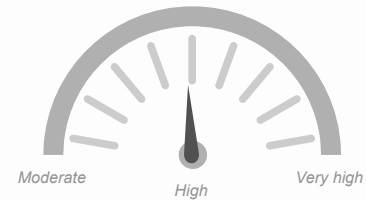
Do you think there's a Planet B

Where do you draw the line?

## Comments

- Not positioned as a traditional fashion week like Paris and London
- Aiming at debating about a series of challenges and to tackle those, companies need to be creative, innovative and edgy
- With Fashion Talks, FFI invites the industry once every two years for an inspiring day full of networking and knowledge sharing
- In the years in between, FFI opts for a light version of the conference with an evening programme titled Fashion Whispers

## Interest for NFA



## 23 Sponsor



TFI / Canada

## Focus

Promoting

Supporting

Connecting ✓

Learning

Producing

## Meet &amp; Mingle night



## Comments

- Quarterly social networking night...
- ...gathering creative entrepreneurs

## Interest for NFA



24 Sponsor

Swedish  
Fashion  
COUNCIL

Swedish Fashion Council / Sweden

## Focus

Promoting



Supporting

Connecting

Learning

Producing

## Swedish Fashion Talents



## Comments

- Project run since 2005 with the aim of supporting new fashion brands in establishment on the market
- Talent program is implemented through projects, networks and activities such as fashion shows and exhibitions
- Applications for Swedish Fashion Talents can be made annually if one has a fashion label specializing in womenswear, menswear and accessories. The selection of a maximum of 8 marks made by a renowned jury who value design, product, idea, concept, quality and business acumen

## Interest for NFA



X

25 Sponsor

Swedish  
Fashion  
COUNCIL

Swedish Fashion Council / Sweden

## Focus

Promoting

Supporting



Connecting

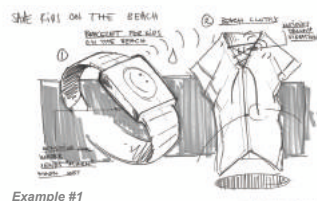
Learning

Producing



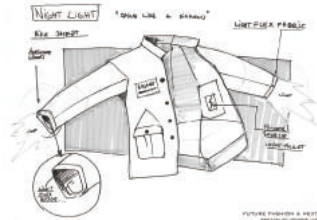
## Fashion Hackathon

A beach garment that alert when your child goes into the water, with the help of an ankle strap on the child, an app and a sensor



Example #1

A suit with printed light under the collar, sleeve or trouser cuff that is invisible during the day but can be folded up in the dark, creating greater safety for cyclists and pedestrians. The concept is called "Nightlight".



Example #2

## Comments

- Objective : To create a new hybrid industry between fashion and technology, and solve a social problem or everyday problem by creating the next generation of wearables
- Organisers : Swedish Fashion Council, Digitizing Fashion, Silicon Vikings, FutureFashion.org, Neue Labs, Bontouch
- Participants : H&M, Uniforms for the Dedicated, Naim Josefi, Lazoschmidl, Reschia, De Moy + Bontouch (Digital design/programming), Future Fashion (Smart materials), Neue Labs (Software), KTH (programming and creative idea)
- Results : 6 prototypes consisting of garments, digital technology and smart materials that solves a social challenge or everyday problem

## Interest for NFA



A connected garment that brings together an artist or an athlete with its audience. A garment that can get feedback and encouragement from the audience before, during or after a performance or appearance, and send a thank you back. The app is called "The Clap App".

Example #3



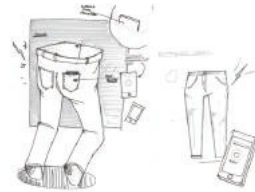
Shoes that can guide its user, to lead the way for someone with impaired vision, consisting of smart fabric that regulates temperature, etc.

Example #4



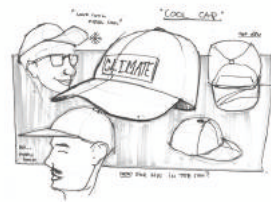
Trousers that are linked to a dating site (ex Tinder and Grindr) and give an electric shock on the butt when someone swipe right and shows interest in you.

Example #5



A cap that regulates temperature, increases the heat in cold weather and lowers it in warm weather.

Example #6



26 Sponsor

Swedish  
Fashion  
COUNCIL

Swedish Fashion Council / Sweden

Focus

Promoting

Supporting

Connecting ✓

Learning

Producing

Frontrow Forensics



Comments

- Through interactive live stream media Frontrow Forensics will measure consumer demand in an early stage of the fashion supply chain in an effort to decrease overproduction
- With new internet service based on advanced video interaction fashion consumers can give instant feedback to companies during fashion shows and presentations
- The project is a collaboration between ASFB, H&M, Swedish Fashion Council, Stockholms University, Stockholm Fashion District, Nacka Kommun, Ericsson and SICS
- Technology tested during Fashion Week in Stockholm A/W 2017 and as received US\$ 230 k in funding from public agencies

Interest for NFA





## 27 Sponsor

MANUFACTURE  
NEW YORK

Manufacture New York / USA

## Focus

Promoting

Supporting

Connecting

Learning

Producing



## Designer co-working &amp; Flex Space



## Comments

- Shared Industrial Sewing Room (Lockstitch, Serger, Blind Hem, Heavy Duty machine great for leather and denim & other specialty machines PLUS pattern/cutting table, full length dress forms, iron & steamer)
- Shared Materials (printer paper, dotted pattern paper, oaktag, muslin)
- Fashion Co-Working Computer Lab (with Adobe Creative Cloud & Rhino)
- Conference/Fitting Room Private Storage Space (small cubby + fabric storage)
- Front Desk Services (package and mail receiving, printing, fax, phone, guests)

## Interest for NFA



## 28 Sponsor

MANUFACTURE  
NEW YORK

Manufacture New York / USA

## Focus

Promoting

Supporting

Connecting

Learning

Producing



## Product development



## Comments

- Product development packages for emerging and independent designers and brands including :
  1. Consultations
  2. Pattern
  3. Pattern adjustment
  4. Muslin
  5. Fitting
  6. Initial sample
- Packages range in price based on complexity, type of fabric and trims
- Manage production, for a fee based on total order size, for a given line by matching brands with the right manufacturer in New York City

## Interest for NFA



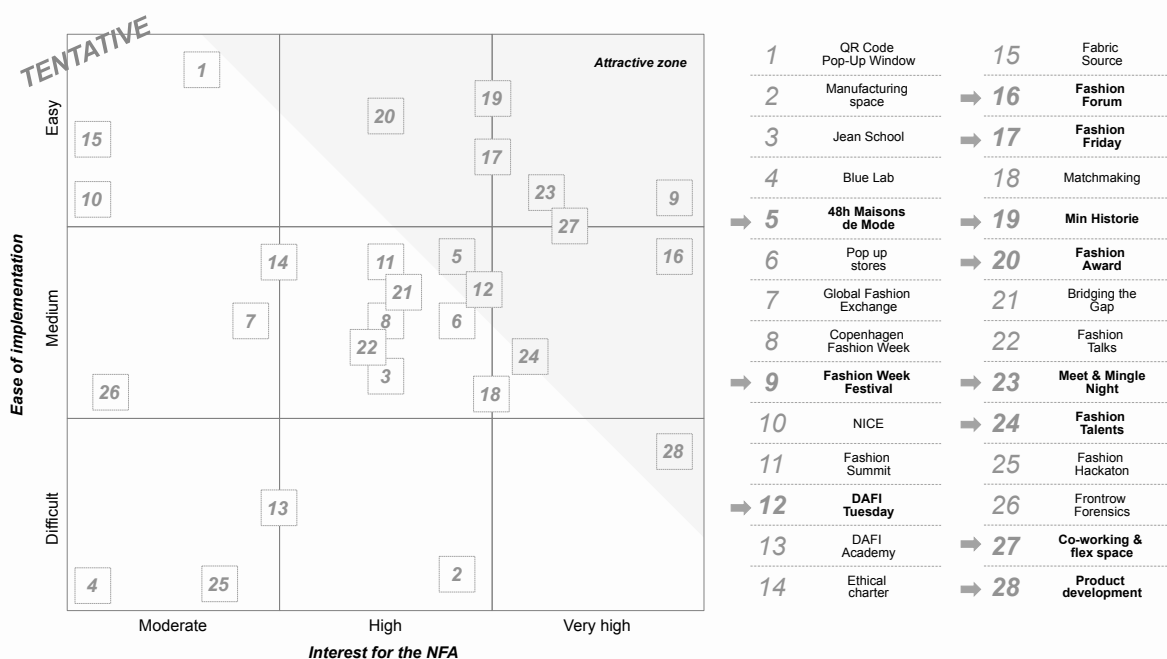
## Best practice : Top-notch services and projects

### 4.1 Snapshot of 28 projects

### 4.2 Summary matrix

### Summary matrix

### 11 projects with high potential





# AGENDA

01

## Fashion clusters : 10 case studies around the World

*From whom could we be inspired?*

02

## Best practice : Top-notch services and projects

*Which initiatives could be adapted to the NFA context?*

03

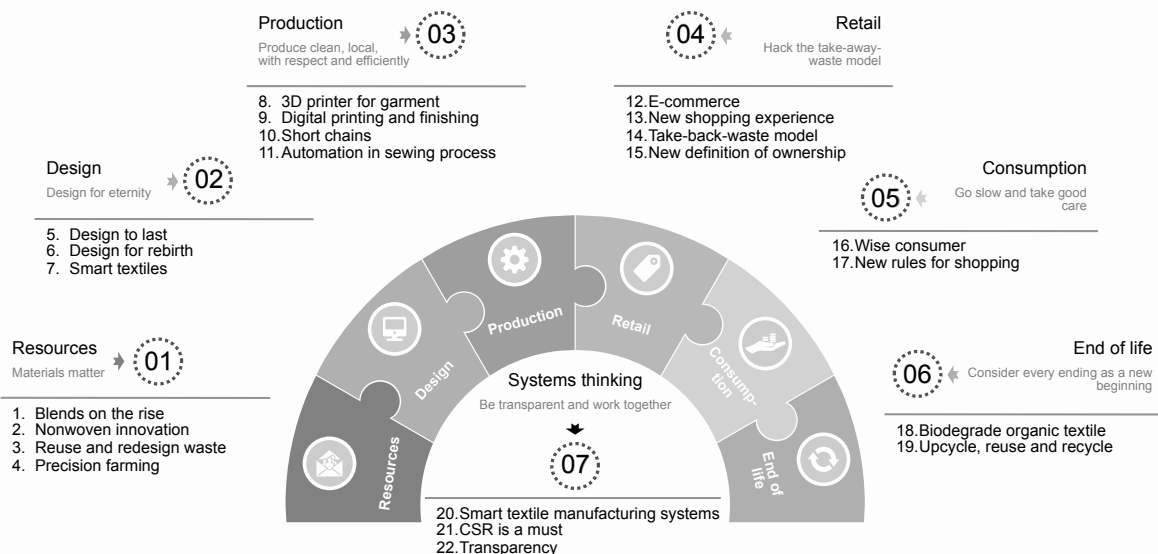
## New trends in the textile scene

*What should be carefully looked at?*

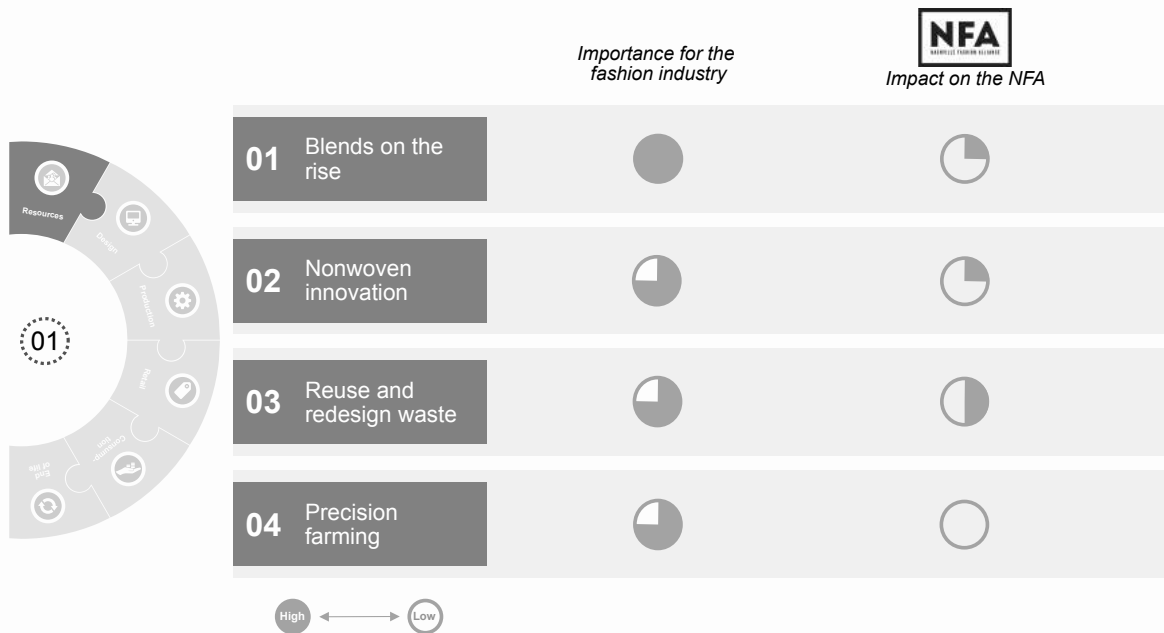
### New trends in the textile scene

03

## 22 trends to be looked at!



## Resources

**01 Blends on the rise**

**Description :** Demand driven by sustainability issue (water use, use of pesticides, GM seeds...). Large customers (like IKEA) are reducing their cotton share. The amount (tons) of 100% CO carded is decreasing in favor of blends (100% MMF and/or blends with CO and CV)

**Salient points**

- ☐ Cotton pushed into high price niche
- ☐ Due to several factors, mainly demand driven (e.g. functionalisation) and therefore linked with higher margins for the spinner, the 100% CO carded yarn is losing shares to following blends / yarns:
  - CO / CV      • 100% CV
  - CO / MMF    • 100% MMF
  - CV / MMF
- ☐ CO losing shares towards MMF and CV

**Interesting links / Websites / Reports**

- ☐ The cotton gap (Gherzi)
- ☐ PCI Fibers / ICAC / Cotton Inc.

**Time horizon**

Short term

Mid term

Long term

**Probability**

Low

Medium

High

**Impact on the NFA**

## 02 Nonwoven innovation

**Description :** Nonwovens are a shorter and cheaper way to produce textile surfaces compared to wovens or knits. Nonwoven technology advancing to even lighter and more 'textile like' materials disrupting yarns



### Salient points

- ☐ If non-wovens prevail, spinning of yarns or filaments as well as weaving and knitting is replaced by non woven technology (1 step from polymer or fiber to fabric)
- ☐ Potential of non-wovens to replace a larger share of garments or sheeting material today still limited:
  - Aesthetics (e.g. surface structure)
  - Design
  - Textile-Look and Haptic
- ☐ First substitutions have happened although limited to functional textiles
  - Medtech Gowns & Drapes (spunbond)
  - Protective apparel (spunlace)

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 03 Reuse and redesign waste

**Description :** Reusing, redesigning or upcycling is regarded as an eco-efficient strategy, even though this approach does not tackle the real problem, namely the increase in both production and consumption



### Salient points

- ☐ Reused textile : The most obvious way in which to go about this, is to work with used clothing (also called post-consumer spills). The process comes down to making new clothes from old pieces or fabrics. Not only fabrics from the fashion industry are eligible for this -- think for instance of old fire hoses, parachutes, flags, car tires
- ☐ Reused production waste : Designers working with pre-consumer spills go for pieces of fabric that were already labeled as waste during the design or production process (before entering the consumer's closet that is). Pattern cutting or fabric production often generate these kinds of surpluses

### Interesting links / Websites / Reports

- ☐ Cliff by Dutch aWEARness is an example of how to recycle post-consumer textiles to new products, turning used clothes into an innovative, recyclable plastic product from biomaterials
- ☐ [www.freitag.ch](http://www.freitag.ch)

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

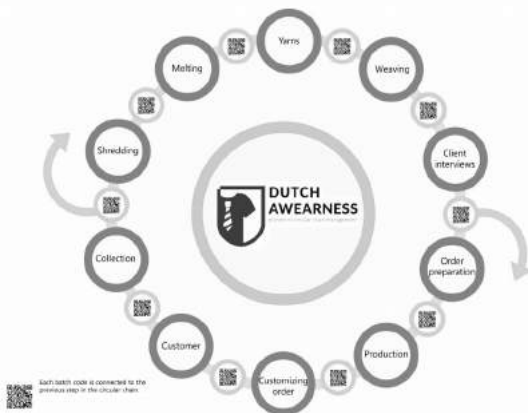
### Impact on the NFA



## Dutch Awearness

ILLUSTRATIVE

### Chain management model



### Comments

- ❑ Work wear and corporate wear that is designed to be reused and offer circular solutions for used workwear that cannot be recycled on the same level. So this entails developing eco-effective (saving of 50% of water, 20% CO2 and waste elimination) textile innovations and controlling circular textile supply chains supported by...
- ❑ ...a Circular Content Management System (CCMS); a circular track and trace system in which all partners in the supply chain are involved
- ❑ Raw materials and products receive unique barcodes, so they can be followed through every stage of development, in order make the raw materials available for reuse. It is a database with information about materials, and includes a Life Cycle Analysis, a purchasing and inventory management tool and a track and trace system



ILLUSTRATIVE

### Illustrations



### Comments

- ❑ First prototype in 1993 handsewn in a small flat in Zürich, Switzerland, made out of used truck tarps, used car seat belts and bicycle inner tubes
- ❑ Nowadays bags are available in eleven F-STORES as well as at over 450 resellers around the world
- ❑ FREITAG Online Store offers an extensive choice of over 5,000 unique products
- ❑ FREITAG has launched a new fiber called F-ABRIC. The materials used are made of the bast fibers hemp and flax as well as Modal, all of which are resources that are grown on European soil and do not harm it or require excessive amounts of water to grow
- ❑ Compared to the production processes of more common textiles, the journey from fiber to finished product is just a short trip for F-ABRIC since all of the production stages take place within a 2,500-kilometer radius of the FREITAG factory located in Zürich

## 04 Precision farming

**Description :** Automation and precision of cotton farming is growing in developed countries to increase efficiency



### Salient points

- ❑ Technology precision agriculture began in the 1990s with the availability of global positioning system (GPS), enabling farmers to map their fields and measure crop yields in detail and apply inputs in precise quantities and locations using variable rate technology (VRT)
- ❑ John Deere, CNH Global, Case and others machine manufacturers have been involved in precision agriculture for many years. Initially, it mainly involved position technologies (GNSS), but it is becoming more complex moving towards the idea of a connected harvester
- ❑ Precision agriculture has spread out to large fields - mostly in the United States, in Europe for wine fields, and Australia
- ❑ Still limitations - fields should be minimum 4 to 40 hectares in area, making the technology difficult to be applied in developing countries
- ❑ Precision farming also requires mechanisation, large equipment, and sophisticated technology - tools that are usually beyond the reach of smallholder farmers

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## Design



Importance for the  
fashion industry

**NFA**  
New Fashion Agenda  
Impact on the NFA

05 Design to last



06 Design for rebirth



07 Smart textiles



## 05 Design to last

**Description :** There is a strong movement that strives for sustainability in the sense of 'lasting long', thus focusing heavily on quality - and not only for the premium brands but also in the mid-range segment. This movement is called 'slow fashion' and it is probably here to stay

## Salient points

- ❑ Supporters of slow fashion denounce the excesses of the fast fashion industry. While earlier on, two to four collections per year was more or less the norm, the industry has evolved to a point where trends seen on the catwalk can be bought in the stores within a mere six weeks. Big fashion chains aim for 30 to 50 collections a year
- ❑ The slow fashion movement believes that quality loss is inevitable in fast fashion, which does not shy away from deplorable working conditions either. Moreover, its speed encourages a throwaway society

## Interesting links / Websites / Reports

- ❑ The Swedish brand Filippa K
- ❑ Fashion Futures 2025

## Time horizon

Short term

Mid term

Long term

## Probability

Low

Medium

High

## Impact on the NFA

Low

High

## Scenario summaries

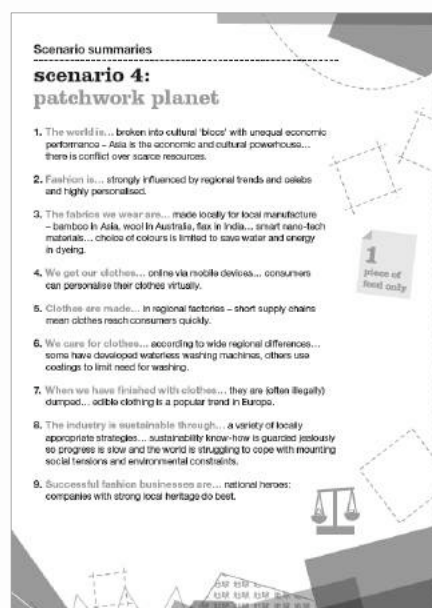
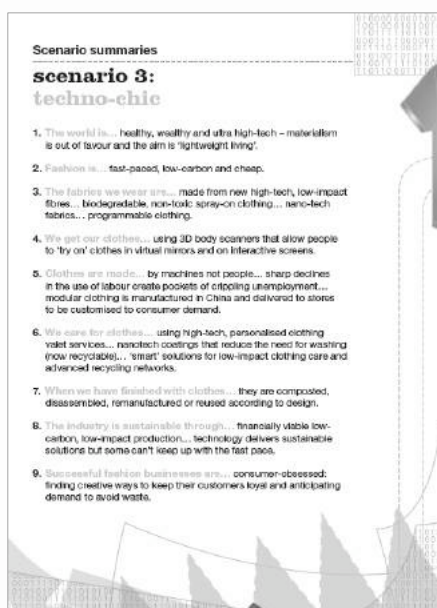
scenario 1:  
slow is beautiful

1. The world is... morose, risk-averse, low-carbon, tightly regulated with sustainable lifestyles and mindsets.
2. Fashion is... clear sustainable and liberating... most consumers are prepared to pay more for a smaller number of high-quality sustainable clothing items.
3. The fabrics we wear are... durable... organic natural fibres... man-made materials from renewable resources... handcrafted, vintage, second-hand... 'smart clothes' monitoring health.
4. We get our clothes... from small or virtual stores with hyper-efficient logistics or we swap with friends.
5. Clothes are made... in different regions of the world according to the manufacturing processes they require... India and Nigeria have big 'refurbished clothing' industries... most workers are paid a 'living wage'.
6. We care for clothes... without harmful chemicals... clothes last longer and are washed less at low temperatures.
7. When we have finished with clothes... we take them back to where we bought them to be shipped and remanufactured in Japan.
8. The industry is sustainable through... Sustainable labelling and digital tagging, ensuring consumers know exactly where their clothes have come from and what impact they've had... but a 'grey economy' with poor labour standards still exists to satisfy those who refuse to conform to the new, slower world order.
9. Successful fashion businesses are... radically transparent: the most sustainable and best value.

## Scenario summaries

scenario 2:  
community couture

1. The world is... struggling to cope with the impacts of climate change and resource shortages but community bonds are strong - many strive for self-sufficiency.
2. Fashion is... expensive new or cheap and second-hand... very high costs of raw materials and disrupted supply chains have resulted in a dramatic fall in the production and sale of new clothing.
3. The fabrics we wear are... second-hand, 'pre-loved' clothing... community-grown hemp... only the rich can afford 'certified new' clothes made from expensive synthetics or virgin raw materials.
4. We get our clothes... at vibrant second-hand markets with tailors and stylists on hand, in retail stores with extra security, on the black market or from clothing libraries.
5. Clothes are made... at home or in community-run recycling centres linked to local, hyper-efficient factories.
6. We care for clothes... using community laundries... one cup of water washing machines... 'make do and mend' is taught in schools.
7. When we have finished with clothes... we sell them back for reuse to boost our incomes.
8. The industry is sustainable through... second-hand clothing becoming a valuable resource... nothing is disposed of.
9. Successful fashion businesses are... part of the local community, providing energy supply, education and even food to employees.


**05 Design to last**
**PART I: THE BASICS**

1. The Curated Closet philosophy
2. Getting started: Define the status quo and set style goals

**PART II: DISCOVER YOUR PERSONAL STYLE**

3. What your clothes say about you
4. Discover your style, phase I: Get inspired
5. Discover your style, phase II: Experiment and fine-tune
6. Putting it all together: Your style profile

**PART III: BUILD YOUR DREAM WARDROBE**

7. Closet detox: The complete guide
8. How to build a wardrobe that fits your life (not your fantasy life)
9. Closet composition 101
10. Selecting a versatile color palette
11. Working with outfit formulas
12. Business hours: Tweaking your wardrobe for work
13. Overhauling your wardrobe: A step-by-step roadmap
14. How (and when) to build a capsule wardrobe
15. Become your own best stylist

**PART IV: THE ART OF SHOPPING**

16. How to shop like a conscious consumer
17. Decision time: When to buy and when to keep looking
18. How to stop overspending and make the most of your budget
19. Assessing garment quality: A beginner's guide
20. Practical pointers for finding clothes that fit well
21. Maintaining and updating your wardrobe throughout the year: A timeline

## 06 Design for rebirth

**Description :** Sustainability could start by thinking about the recycling options right from the start of the design process



### Salient points / Advice to designers

- ☐ Go for only one material to facilitate the sorting process and recycling
- ☐ Pay close attention to bindings and seams. Avoid permanent bindings and opt for threads that you can quickly remove when necessary
- ☐ White textile makes it possible to redye after recycling
- ☐ Consider modular design so you can replace parts that wear out quickly without having to throw the entire item out. (Think of detachable white collars for shirts, for example.)

### Interesting links / Websites / Reports

- ☐ Wear2™ is a new eco stitching technology (seam technology) developed by a group of British retailers, manufacturers and textile recyclers. The technology allows you to easily disassemble clothing at the end of its life with the help of microwave treatment
- ☐ <http://www.c2ccertified.org> (Cradle to Cradle Products Innovation Institute)

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 07 Smart textiles

**Description :** Although smart textiles remains a niche at the moment, it is a fast growing sector with numerous potential applications



### Salient points / Advice to designers

- ☐ The global smart textile/fabric market is expected to be valued at USD 1.59 billion by 2020, growing at a CAGR of 24.1% from 2013 to 2020
- ☐ Fiber yarns, fabric and other structures with added-value functionality have been developed for a range of applications, textile materials and techniques have become an important platform for high-tech innovations
- ☐ The goal is to create textile products that interact by combining smart materials and integrated computing power into textile applications
- ☐ Industry segments focus on sports, health, security, communication, furnishing as well as experimental design applications

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

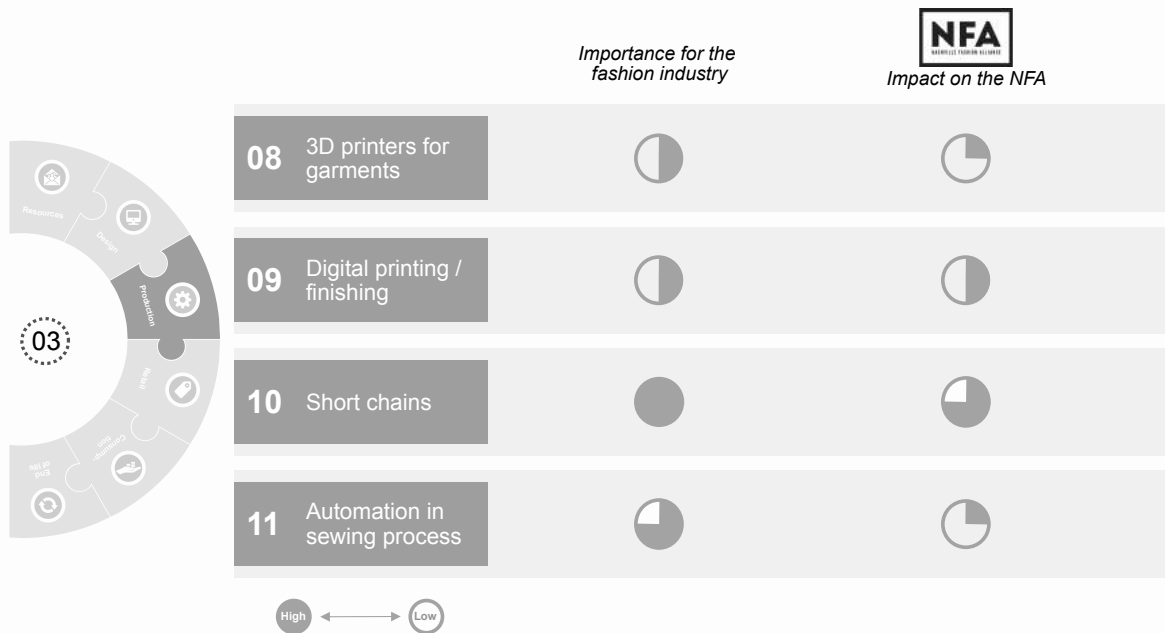
High

### Impact on the NFA





## Production



## 08 3D printer for garments

**Description** : A successful introduction of 3D printed textile surfaces (nonwoven, woven, knitted and laced) or finished products (garments, etc.) will cannibalize fibers, filaments and spun yarns

### Salient points

- ☐ Today's status of 3D printing in relation to textile surfaces is as follows:
  - Accessories : successfully done and introduced in the textile value chain
  - Nonwoven : successfully done and introduced in the textile value chain (e.g. TamiCare) → cannibalizing fibers
  - Lace : successful trials but not introduced (visual and haptic aspects) → cannibalizing filaments & SSSY<sup>1</sup>
  - Knits : experimental stage (with PLA) → cannibalizing filaments & SSSY<sup>1</sup>
  - Wovens : experimental stage → cannibalizing filaments & SSSY<sup>1</sup>
- ☐ Many textile research institutes are strongly involved in R&D activities

<sup>1</sup>single-strand spun yarn

### Time horizon

Short term

Mid term

Long term

### Probability

Low

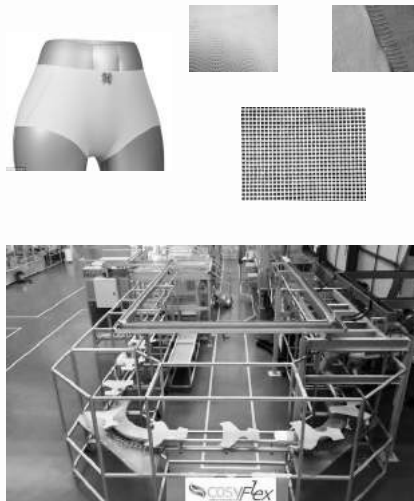
Medium

High

### Impact on the NFA



**Cosyflex™ is an innovative process for 3D Printing for Fabrics***TamiCare*  
Textile Reinvented

Technology	Advantages	Illustrations
<ul style="list-style-type: none"> <li>Instant creation of finished products from raw materials with no cutting and no waste</li> <li>Manufacturing with multiple stage 3D printing processes and with many controllable variables allowing unlimited fabric variations</li> <li>Various types of liquid polymers such as natural latex, silicon, polyurethane and teflon, as well as variety of textile fibres such as cotton, viscose and polyamide enable tailor-made fabrics for any need</li> </ul>	<ul style="list-style-type: none"> <li>Industrial scale mass production, 3D Fabric Printing</li> <li>A fully automated process</li> <li>Instant creation of finished products from raw materials</li> <li>Mass production or on-demand production catering to immediate local needs</li> <li>No cutting, no waste</li> </ul>	

**09 Digital printing / finishing**

**Description :** Digital printing and finishing will transform the finishing sector and create new business models, e.g. garmenters integrating backwards into finishing

**Salient points**

- ☐ Digital printing and finishing does offer the following advantages:
  - Sustainability: less water and inks
  - Speed: 1<sup>st</sup> order and replenishment
  - Flexibility/logistics: Reordering vs. warehouse, more collections, mass customization
- ☐ In addition new business models will emerge: retailers working closer with finishers, garmenters integrating backwards into finishing, weavers integrating forward
- ☐ New strong players controlling garmenting and digital finishing (mass customization) will emerge

**Time horizon**

Short term

Mid term

Long term

**Probability**

Low

Medium

High

**Impact on the NFA**

## 10 Short chains

**Description :** Producing locally obviously facilitates both quality checks and communication. In addition, it reduces the risks that come with a global supply chain. Especially in the case of smaller collections, the advantages of producing locally outweigh the costs of global transport and (more) difficult communication.



### Salient points

- ❑ Clothing is often produced in faraway destinations like India or China. This does not necessarily make for better products, but the cost of labor is just much lower in these countries. Moreover, their (environmental) legislation is often weak or even next to nonexistent. The other side of the coin (which is often ignored) is that the logistics of the entire system depend on the supply of fossil fuels. Local production would save a lot of oil due to shorter transportation distances.
- ❑ Bringing production and consumption closer together has several advantages:
  - logistically (shorter distances)
  - communication-wise (efficiency and fewer misunderstandings)
  - in terms of closing the loop (e.g. reusing clothes will be easier if they can find their way back to production in the same country)

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 10 Short chains



LEARN

FACTORIES

PROJECTS

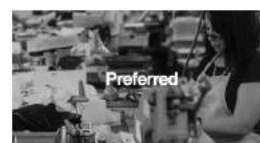
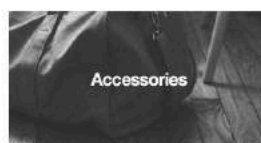
PRICING



LOG IN SIGN UP

### OUR MANUFACTURING COMMUNITY

Start your product development process with one of our 10K factories.



## 11 Automation in sewing process

**Description :** The preparation of the manufacturing process is making use of more computer based systems, supporting the designing and sketching process, and provide inputs for the cutting process. Sewing is the most labour intensive process step and offers huge potential for automation. Consequently, the whole manufacturing process can be completely automated and remotely controlled



### Salient points

#### ❑ CAD/CAM systems

- Computer-aided designing (CAD) of products before manufacturing
- CAD helps to visualize and test designs before production
- Specific software needed
- Computer-aided manufacturing (CAM) executes the designs and is mostly used with automated cutting machines and systems

#### ❑ Sewing automation

- Picking garments up, stitching two pieces together, perfectly aligned, without buckling, neatly and with right tension is tricky for machines
- Increased computing power enables new systems to autonomously pick-up, control and sew garments at high precision

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## Retail



Importance for the  
fashion industry

**NFA**  
New Fashion Alliance  
Impact on the NFA

12 E-commerce



13 New shopping experience



14 Take-back-waste model



15 New definition of ownership



High ← → Low

## 12 E-commerce

**Description :** E-commerce market for apparel grows fast, posing new challenges for retailers



### Salient points

- ☐ Total US e-commerce sales have got an estimated size of \$384.9 billion in 2016, of which \$87.8 billion belong to the apparel & accessories segment
- ☐ As ecommerce has experienced high growth across the industries, it has grown fastest in the fashion industry over the last 5 years
- ☐ Studies show over 50% of consumers frequently buy clothes online, and 39% say that they are more likely to do so now than a year ago
- ☐ Inspiring consumers is no longer a guarantee for sales as price comparison and finding an alternative became so much easier

*Source: emarketer (2013), Dotmailer Fashion Market Trends, Tradedoubler, Humatica research and analysis.*

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 13 New shopping experience

**Description :** Classic shopping experience in retail is threatened by novel online services offered by creative start-ups



### Salient points

- ☐ e-commerce market is growing rapidly and attracting start-ups
- ☐ Start-ups attack all different aspects of classical shopping: advising, customising, time consumption, price comparison, etc.
- ☐ Growth of the millennials will further drive these businesses

### Interesting links / Websites / Reports

- ☐ Stantt (3 inputs, 75 sizes)
- ☐ Outfittery (we style, you decide)
- ☐ Shoes of Prey (Design your own shoes)
- ☐ Etsy (sell, buy, live handmade)
- ☐ Stitch fix (personal stylist for men and women)
- ☐ Thredup (second hand clothing)

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



# PRIMARK®

## Illustrations



## Comments

- New store in Strasbourg will open in 2018 :
  - 61,000 sq ft
  - 400 to 500 direct employees
- Six stores in France: 3 in the outskirts of Paris + Marseille, Dijon and Lyon. 3 further openings are planned for the second half of the year and 4 in 2017
- The Irish retailer closed the first half of its fiscal year with sales for US\$ 3,5 billion (7% rise)



Source : [https://youtu.be/OaGp5\\_Sfbss](https://youtu.be/OaGp5_Sfbss)

## 14 Take-back-waste model

**Description :** The possibility to return garments to the retailer, who gives clothes a second life as resources for new items, is gaining popularity



### Salient points

- ❑ Several manufacturers and clothing chains have already started to collect clothes
- ❑ To encourage consumers to return unwanted items, they often offer a discount on the next purchase.
- ❑ Some brands team up with ngo's (such as Marks & Spencer, who collaborate with Oxfam: the collected clothes are donated to the fair trade organization and the customer gets a discount at M&S), while others place collecting boxes in their own stores
- ❑ The American outdoor brand Patagonia has slightly higher ambitions. The label mainly wants to collect its own clothes and reuse them for its own collections. The idea is to create a closed-loop system
- ❑ The best known initiative is probably H&M's Garment Collection Program, which directs its efforts toward recycling old clothing. In 2014, H&M released the first capsule collection made from 20% recycled fibers from used clothing collected through its special program. In addition, H&M invests in the development of better recycling methods, for instance organizing a competition to stimulate innovative technology and reaching out to researchers working in the field of recycling and reusing

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 15 New definition of ownership

**Description :** The new sharing and borrowing is sometimes also referred to as the sharing economy or peer economy. The idea behind it is that you have access to a certain product or service, rather than owning it. Why not for clothing?

### Salient points

- ❑ **Swapping :** Swishing vzw is a non-profit organization that specializes in, well, swishing. They often organize pop-up events where you can leave your clothes behind in exchange for coupons. These coupons, in turn, can be used to buy someone else's clothes. Swishing's twin sister Swapping blew over from the States and also specializes in events where you can exchange clothes
- ❑ **Clothing libraries :** 'Wear beautiful clothing, but not at the expense of people and the environment', LENA's website states. This Amsterdam fashion library opened its doors in 2014 to present an alternative to bulging wardrobes and fast fashion. Various subscription options are available: you can lend clothes that you simply swap for others again after a while
- ❑ **Leasing :** Fashion company MUD jeans was created in 2012. In 2013, MUD jeans introduced the lease option, which attracted a lot of international attention. Customers simply had to pay €20 up front, and then €6 for each month that they wanted to lease a pair of jeans. When they grew tired of their rental pants, they could just send them back and stop paying



### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## Consumption

Importance for the  
fashion industry

**NFA**  
New Fashion Alliance

16 Wise consumer



17 New rules for shopping



## 16 Wise consumer

**Description :** In all sectors, consumers are becoming more conscious and more outspoken, asking questions about labels, resources, production circumstances, etc. As a retailer or manufacturer, you should be able to provide adequate answers to these questions

**Salient points**

- ☐ **Fabrics :** When buying new clothes, for instance, you can make a point of checking the labels and opting for items made from organic cotton, lyocell, hemp, bamboo or recycled materials (such as recycled plastic) (Check the Nike app « Making »)
- ☐ **Made-in :** Though Asian-manufactured clothing does not necessarily equal unsustainable clothing, the general rule 'the closer the better' still stands
- ☐ **CSR :** Retailers that invest in sustainability often train their staff to inform customers about the origins of the items they sell. But even when this is not the case, you can still do your part as a consumer by asking about these origins

**Interesting links / Websites / Reports**

- ☐ Higg index (a tool developed by the Sustainable Apparel Coalition for the purpose of measuring the social and environmental impact of clothes and shoes throughout their entire life cycle)
- ☐ Labelinfo.be (Overview of 70 sustainability labels)
- ☐ Online platforms for sustainable shopping (fair Fashion Guide, Ecofashionworld, etc.)

**Time horizon**

Short term

Mid term

Long term

**Probability**

Low

Medium

High

**Impact on the NFA**

## 17 New rules for shopping

**Description :** Sustainability can be in small things. Old habits die hard but new behaviors could radically change the rules of the game

**Salient points**

- ☐ Explore the possibilities, such as swishing, swapping, second hand stores and online platforms. As a consumer you're free to swap or even sell your clothes, giving them a second life. This spells big business opportunities. Golden rule : buy slow and take good care of your clothes
- ☐ **Repair :** Things are moving on the repair or DIY front, as seen in the rise of sewing and knitting workshops, which cater to people who want to make or repair their own clothes again
- ☐ If we want to encourage recycling, upcycling or giving things a new life, we need to make it as easy as possible for the consumer to donate his clothes. And this is where the retailer or fashion entrepreneur comes in

**Interesting links / Websites / Reports**

- ☐ Love your clothes platform
- ☐ Upcycle That

**Time horizon**

Short term

Mid term

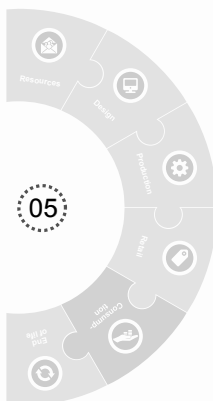
Long term

**Probability**

Low

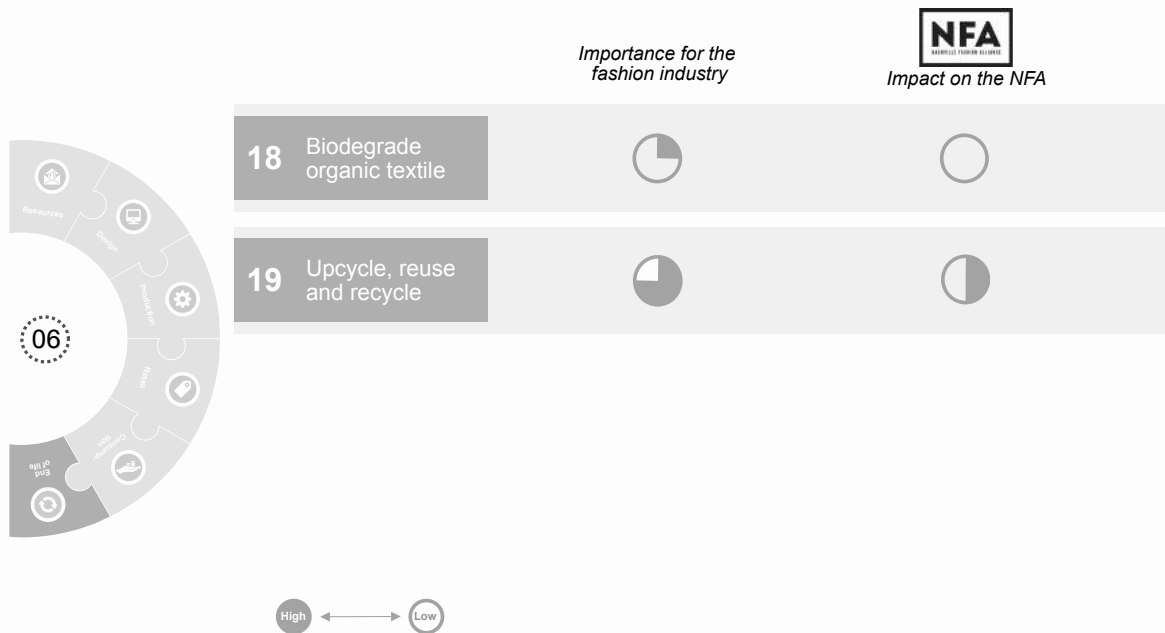
Medium

High

**Impact on the NFA**



## End of life



## 18 Biodegrade organic textile

**Description :** 20% of global production waste comes from the textile and apparel sectors. One way, then, is to make sure our clothes are biodegradable. At the moment this strategy is not yet widely used because it still requires a lot of research

### Salient points

- ☐ Biodegradable fabrics : These are natural textiles that easily break down, like cotton, silk, wool, cashmere and hemp
- ☐ Non-biodegradable fabrics : Synthetic fabrics like polyester, spandex, nylon, ... though they will eventually break down, this process might take between 20 to 200 years
- ☐ In reality it's obviously not that simple, because clothes are often made from a blend of fabrics (often polyesters) or are heavily coated ... This obviously impedes biodegradation. Other extras, like threads, buttons, zippers and labels could also spoil the fun

### Interesting links / Websites / Reports

- ☐ Love your clothes platform
- ☐ Upcycle That

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 19 Upcycle, reuse and recycle

**Description :** Reusing discarded pieces of fabric to create new products has been popular for quite some time, but nowadays this process is becoming ever more professionalized



### Salient points

- ❑ **Upcycle clothing :** The most obvious way in which to go about this, is to work with used clothing (also called 'post-consumer spills'). Discarded textile is creatively reused and can re-enter the market as a new, upcycled product. The process comes down to making new clothes from old pieces or fabrics. This closed-loop system often requires intermediaries such as thrift shops or other organizations that collect clothes
- ❑ **Reuse production waste :** Designers working with pre-consumer spills go for pieces of fabric that were already labeled as waste during the design or production process (before entering the consumer's closet, that is). Pattern cutting or fabric production often generate these kinds of surpluses
- ❑ **Recycle :** Recycling natural materials (like cotton and wool) happens mechanically: it's a process of stripping and shredding fabrics into smaller particles; fibers. The fibres that emerge from this process have been broken and torn, making them very short. Using (only) these kinds of fibers would threaten the quality of the fabric; the product would not be strong enough and would disintegrate quickly. To achieve a better quality, the short fibers are mixed with long (new) and less fragile fibers. It also matters whether your fabric is dark or light. After all, the fabrics have to be decolorized, with darker fabrics obviously calling for more bleach

### Time horizon

Short term

Mid term

Long term

### Probability

Low

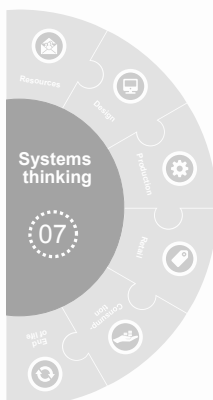
Medium

High

### Impact on the NFA



## Retail



### Importance for the fashion industry



Impact on the NFA

20	Smart textile manufacturing systems		
21	CSR is a must		
22	Transparency		



## 20 Smart textile manufacturing systems

**Description :** System providers (Rieter, RSG, T-Data, Spider-web, etc.) develop tools enabling process monitoring, diagnosis and recommended actions. Next steps will consist of integrating equipment from different OEMs and allowing an active control of production machines



### Salient points

- ☐ Production management software registering all machine data and technological parameters
- ☐ Fast data exchange and direct interaction with machines
- ☐ Multilingual user interface for most languages in the textile industry
- ☐ Data analysis and diagnostics, trend analysis and benchmarking
- ☐ Optimisation of energy consumption, monitor production climate
- ☐ Recommendations for settings
- ☐ Mobile applications, windows compatible

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 21 CSR is a must

**Description :** Corporate Social Responsibility is a concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with their stakeholders on a voluntary basis usually beyond corporate legal obligations towards society and the environment



### Salient points

- ☐ Countering fast, cheap fashion and the damaging effects of fashion consumption
- ☐ Defending fair wages, working conditions and workers' rights
- ☐ Supporting sustainable living environments
- ☐ Addressing toxic chemical use
- ☐ Using and/or developing eco-friendly fabrics and components
- ☐ Minimizing water use
- ☐ Recycling, addressing energy efficiency and avoiding waste
- ☐ Developing or promoting sustainability standards for fashion
- ☐ Launch awareness-raising initiatives
- ☐ Protecting animal welfare

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

High

### Impact on the NFA



## 22 Transparency

**Description :** More and more often, organizations are confronted with consumer questions about their concepts, products, services, supply chain and cost structure. Everything has to be transparent and needs to be traceable to its source



### Salient points



- In June 2016, Marks & Spencer has published an interactive map of its supply chain detailing its clothing and food supplier
- The map allows stakeholders and customers to see where the retailer's clothing and home products are made and where food products are produced
- The M&S supply chain interactive map lists the factories in a particular location, what they make and how many people work there
- In total it lists 690 clothing and home and 540 food suppliers
- M&S published the map along with its 2016 Plan A report, which details progress in company's green and ethical programme

### Time horizon

Short term

Mid term

Long term

### Probability

Low

Medium

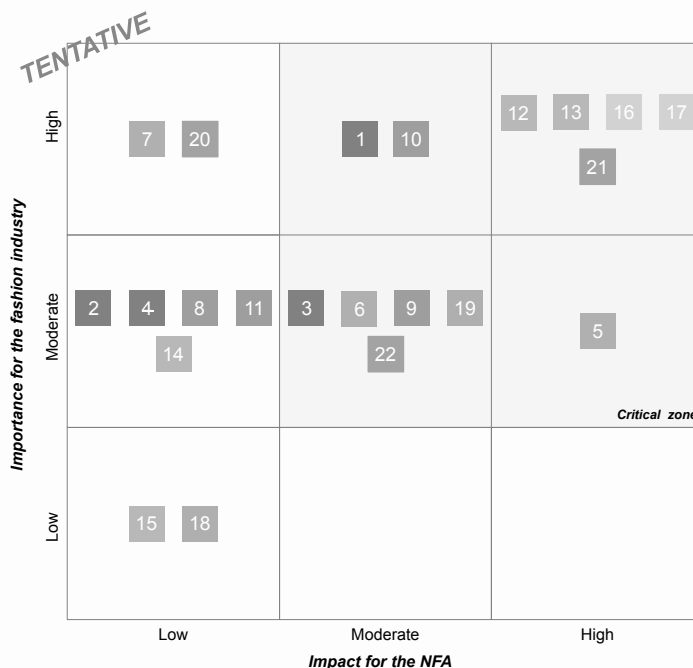
High

### Impact on the NFA



## Summary matrix

### 12 trends to carefully monitor



- |                                     |  |
|-------------------------------------|--|
| ➔ 1 Blends on the rise              | ➔ 12 E-commerce                        |
| 2 Nonwoven innovation               | ➔ 13 New shopping experience           |
| ➔ 3 Reuse and redesign waste        | 14 Take-back-waste model               |
| 4 Design to last                    | 15 New definition of ownership         |
| 5 Precision farming                 | ➔ 16 Wise consumer                     |
| ➔ 6 Design for rebirth              | ➔ 17 New rules for shopping            |
| 7 Smart textiles                    | 18 Biodegrade organic textile          |
| 8 3D printing for garments          | ➔ 19 Upcycle, reuse and recycle        |
| ➔ 9 Digital printing/finishing      | 20 Smart textile manufacturing systems |
| ➔ 10 Short chains                   | ➔ 21 CSR is a must                     |
| 11 Automation in the sewing process | ➔ 22 Transparency                      |



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