Istituto Regionale Programmazione Economica della Toscana

KNITWEAR AND APPAREL IN TUSCANY

How the sector operates

The most dynamic knitwear and apparel firms are located in the Prato district, where they have spread more recently than textile, largely due to the Chinese enterprises, but also in the Empoli area, whereas the Arezzo province has witnessed a reduction in the number of local units and employees. The changes of recent decades, especially in consumption behaviours, have led to a segmentation of the industry, which today presents rather different competitive strategies and target markets, and a steady advancement of large-scale retail channels, like factory outlets and e-commerce. There has been a concentration of distribution chains, and the ready-to-wear has been replaced by the so-called “fast fashion”, which by its quickly changing trends further reduces the product’s life cycle.

In broad outlines, the local response has followed two strategies: the first is direct association with the main international chains and brands, involving the need to meet requests from increasingly demanding customers in more stringent times and at higher quality standards; the second is to create own brands of medium- to high-quality products and a network of mono-brand stores and e-commerce websites. Both strategies require an extremely rational organization and experts for each phase of the production chain, who have technical and manual skills, are capable of operating machines, but also of assessing the sustainability of materials, controlling the quality and complying with international standards.

Skill needs: strategic competencies and job profiles

Both the dependence on large-scale retail and the competition for market niches entail a quality improvement of manufactured goods, and a more efficient internal organization. As a result, the specialization of personnel, both internal and of subcontractors, takes a fundamental role. Some frontrunner businesses have been working to obtain the certification of local laboratories, not without difficulties, especially with Chinese firms. The “Made in Italy Tuscany Academy” (MITA), a higher technical institute with members from local firms, has an acknowledged role in sectoral training. It prepares technicians for the fashion industry through long internship programs and courses delivered by experienced operators.

The most demanded profiles are production (progress, control and coordination) specialists, particularly highly-qualified professionals having a thorough knowledge of the production chain and the ability to supervise customer and sub-supplier relations (the so-called **dispositore**).

The quest for high quality and novel products implies the need of skilled workers, who in the past were trained very young through in-company coaching, a system that is today too expensive for the single firm, also due to reduced generational turnover. The most cited occupations in terms of high demand and low supply are **knitters** and **tailors**, but in Tuscany there is an almost total absence of institutes specifically designed to teach in the style of the old-fashioned workshops. Some local entrepreneurs warned against the loss of such competencies as a defeat of the Made in Italy, whose products are highly sought after just when intergenerational learning becomes obsolete. This paradoxical situation has been poorly communicated so far, while the professional opportunities are all around for both employed and self-employed workers.

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A taxonomy of the required professional qualifications

The table below combines data from three sources: the mandatory employment notices from firms to job centres, introduced in 2008; the IRPET survey on the training needs of the Tuscan firms having recorded higher-than-average turnover and employment rates after the crisis; the focus groups with firms belonging to strategic sectors for regional growth. The quantitative and qualitative data collected were used to classify occupations by employment capacity (number of newly employed), and job stability (combination of days worked and contract type).

Overview of the most sought-after and in-demand knitwear and apparel jobs*

		Job stability	
		Medium-high	**Medium-low**
Employment capacity (number of newly employed)	**Medium-large**	Industrial sewing-machine operators, fabric clothes and similar **Artisan tailors, cutters, pattern makers and hatters** Handicraft workers in fabric, leather and related materials **Other textile and apparel machine workers, and related workers** Hand and hand-loom weavers and knitters **Power-loom and weaving- and knitting-machine operators** Furriers, fur pattern makers and related workers	Suitcase and bag makers, and related workers (even in pleather and cloth articles) Linen makers, manual embroiderers and related workers Non-qualified industrial workers and related workers Painters, sculptors, designers and restorers of cultural goods
	Medium-small	Packaging equipment operators and industrial packaging workers Spinning- and winding-machine operators Upholsterers and mattress makers Textile printing machine operators	Porters, deliverers and related workers **Production planning technicians** Footwear craftsmen and workers, and the like **Manufacturing technicians** Leather- and fur-products machine operators in large-scale processing and production Fibre preparers Textile dry-cleaning, bleaching and dyeing machine operators

* Key professional qualifications, whatever class they belong, are highlighted in bold.

The analysis of recruitment capacity resulted in two occupation groups (medium-large and medium-small), depending on the number of newly employed (larger/smaller than the median value). The analysis of job stability resulted in two occupation groups (medium-high and medium-low), depending on the value of the composite indicator (higher/lower than the median value).

Territorial localization

The map below shows the location of local units in the sector, highlighting the most dynamic firms in terms of turnover rate and number of workers for the period 2007-2011. This graphical representation allows to appreciate the degree of diffusion/concentration of production activities on a regional basis.

The knitwear and apparel firms