

VENICE SUSTAINABLE FASHION FORUM



PRESS RELEASE

VENICE SUSTAINABLE FASHION FORUM 2025: “HARMONIZING VALUES” FOR A NEW ITALIAN AND EUROPEAN INDUSTRIAL MODEL

Sburlati (Confindustria Moda): “Sustainability, legality, and innovation must go hand in hand. Only by harmonizing values and rules can Italian fashion remain a model of excellence for Europe and the world.”

Sciuccati (The European House – Ambrosetti): “This is no longer the time for words, but for action: we need common standards and concrete measures to make sustainability a true leverage of competitiveness.”

Carron (Confindustria Veneto Est): “From Venice, we launch a united challenge for a sustainable, responsible, and competitive transition of the fashion industry — the second largest industrial sector in Italy and in the Veneto region — which must be defended and enhanced at all costs.”

Venezia, October 23rd, 2025 – Harmonizing norms, values, and processes across the entire extended fashion supply chain — this is the central challenge addressed on the opening day of the **Venice Sustainable Fashion Forum (VSFF)**, the international event conceived and promoted by **Confindustria Moda**, **The European House – Ambrosetti (TEHA)**, and **Confindustria Veneto Est - Area Metropolitana Venezia Padova Rovigo Treviso**. The Forum officially opened today in Venice, on the Island of San Giorgio, within the prestigious setting of the Giorgio Cini Foundation.

Now in its fourth edition, the event reaffirms Italy’s role as a leading European hub for the sustainable evolution of the fashion industry — a sector currently facing a phase of deep complexity, marked by geo-political and economic tensions, shifting consumer behaviors, and new international regulations. Made in Italy and Made in Europe are under pressure from ultra-fast models and unfair commercial practices that compress timelines, quality, costs, and rights across the supply chain.

This year, the Venice Sustainable Fashion Forum **places the spotlight on the evolving concept of sustainability — no longer viewed solely through an environmental lens, but expanded to include the key dimensions of collective responsibility and labor governance**. These aspects involve the entire fashion ecosystem, from major fashion houses to artisanal workshops.

Under the theme “**Harmonizing Values**,” the opening day of the Venice Sustainable Fashion Forum brought together institutions, brands, supply chain companies, experts, and international stakeholders to outline a new industry model capable of integrating sustainability, innovation, and competitiveness in a fast, concrete, and cohesive way.

Defending Made in Italy and Made in Europe, ensuring transparency and legality across the supply chain, and transforming sustainability into a real competitive advantage represent the crucial challenges of the coming years.

From representatives of Kering, Prada, Ermenegildo Zegna, and Armani to supply chain companies engaged in research, recycling, and product innovation, the discussions highlighted the urgent need for a new balance between ethics and development — one based on shared rules, transparent processes, and harmonized standards to build a fashion system that is more coherent, competitive, and responsible.

STATEMENTS:

Luca Sburlati, President, Confindustria Moda, stated: *“The fashion system is under pressure: exports are slowing, imports are rising, and ultra-fast models are threatening the quality, rights, and value of Made in Italy. Our response must be united: legality, innovation, and ethical consistency must become the new pillars of European competitiveness. EPR is not a constraint, but a major opportunity to build the first European textile recycling supply chain in Italy, creating jobs and sustainable value. We must harmonize regulations, simplify audits, and defend the dignity of labor across the entire production chain. Sustainability cannot be just a bureaucratic requirement — it is the lever to restore centrality to Italian manufacturing, rich in expertise but poor in raw materials, and to build a system that becomes a new engine of beauty, responsibility, and innovation.”*

Flavio Sciuccati, Partner & Director Global Fashion Unit, The European House – Ambrosetti, highlighted: *“This fourth edition of the Venice Sustainable Fashion Forum marks an important milestone: over 350 participants and, for the first time, full representation of the fashion ecosystem, with an almost equal presence of brands and companies from every segment, evenly distributed between upstream (textiles and leather) and downstream (finished products), alongside service providers, institutions, trade associations, and academia. The entire supply chain is here today — spanning all sectors: textiles-apparel, footwear, leather goods, jewelry, eyewear, and machinery — to address not only the issue of sustainability but also the competitiveness of the Italian fashion system as a whole. Such a broad and diverse audience is the ideal starting point to work together on this year’s theme, Harmonizing Values, transforming ideas and commitments into measurable actions that enhance the excellence of Made in Italy in the global context.”*

Paola Carron, President, Confindustria Veneto Est, declared: *“The VSFF has become the place where leaders and all actors in the extended fashion supply chain can share analysis and proposals for a sustainable, responsible, and competitive transition. This supply chain is the second-largest industry in Italy by export, and also in Veneto, with over €14 billion and 100,000 employees — it must be defended and promoted at all costs. Especially now, in a critical moment for the sector. The fashion system is under attack: an influx of low-cost foreign products from ultra-fast fashion, which do not meet the same high social and environmental standards as our companies. This dumping hits Veneto hard: in the first half of 2025, fashion exports fell by -4.5%, while imports rose by +4.3%, including a +9% increase from China, with thousands of parcels arriving daily without paying duties and without customs checks. We need a system of clear rules and effective controls, harmonizing national and EU regulations and processes — from EPR to audits. And we need a united pact for traceability and legality throughout the supply chain. Only together can we make a difference.”*

THE STUDY “JUST FASHION TRANSITION 2025”

Carlo Cici, Partner & Head of Sustainability Practices, The European House – Ambrosetti, presenting the study, declared: *“Reframing the transition within a new geopolitical grammar focused on competitiveness and security reminds us how powerful narratives are in shaping the course of change. The EU fashion sector is a clear example. The value attributes that long defined the competitive advantage of France, Italy, and Spain have lost media traction over the past 20 years. Tradition, Luxury, Craftsmanship, Design, and Sustainability are now associated with EU ‘Brand-of-Origin’ countries less frequently than during the 2000–2012 period (down by an average of 5 percentage points). Meanwhile, China has successfully redefined its role in global fashion by leveraging Innovation (+5.6 pp) and Creativity (+6 pp), moving away from its historic reputation as the ‘factory of the world. Action is not essential, it is urgent. Innovation is the only lever capable of reconciling short-term margins with long-term sustainable development. Because in an unsustainable market, no company can thrive. That’s why I believe the six proposals outlined in the study — aimed at fueling a transition that is truly competitive and fair — will spark significant debate.”*

The core of the new strategic study is built on three pillars:

- **Fair pragmatism** – only proposals that can be implemented are truly effective.
- **Solutions first** – practical examples of success are essential to inform decision-making.
- **The power of narratives** – the way we talk about phenomena influences their outcomes.

These principles form a logical thread that addresses the main challenges, the readiness level of stakeholders, and the key solutions available to pursue a competitive transition — one that reconciles short-term margins with long-term development through innovation.

Challenges

- **The new geopolitical grammar of the transition places competitiveness and security at the forefront.** In a context of growing geopolitical instability, institutional approaches to sustainability are shifting worldwide. To manage the rising “green-lash,” new ways of interpreting the transition are being explored. Particularly at the EU and Italian levels, political decisions are increasingly recognizing the economic relevance of issues related to ecosystem health.
- **The European Union’s fashion sector is defined by two key trends: increasing fragmentation and a steady rise in labor productivity.** By 2030, European fashion could grow by 12%, despite weak demand and rising costs. While the number of companies continues to increase, nearly 293,000 jobs are at risk. At the same time, labor productivity is expected to double compared to 2018 levels, addressing the current gap where the sector stands at nearly half the EU manufacturing average (€40.6K vs. €80K per capita).
- **The evolution of fashion narratives, which have long characterized “Brand-of-Origin” and “Producer” countries, now positions the latter as innovation leaders.** The frequency with which countries are associated with fashion value attributes influences their global positioning. “Brand-of-Origin” countries, historically linked to cultural heritage and craftsmanship, are losing strength and ceding ground to “Producer” countries like China, which are consolidating their image through innovation. Sustainability still lacks a clear narrative leadership.

Readiness

- **In times of uncertainty, consumers are increasingly engaging in “doom spending,” while the difficulty in accessing environmental information remains high.** Driven by persistent uncertainty and rising inflation, younger generations are experiencing growing pessimism and anxiety about the future — leading them to seek comfort in luxury goods, which they purchase more frequently.
- **The simplification efforts promoted by the new EU Competitiveness Compass are causing delays in 60% of sustainability regulations within the fashion sector.** These rollbacks threaten both competitiveness and legal certainty across the EU. Nevertheless, the EU remains at the forefront in offering financial incentive programs to support companies in their transition toward decarbonization, circularity, and innovation.
- **After the slowdown in 2024, attention to sustainability within the Italian fashion supply chain has seen a resurgence, although primarily driven by compliance requirements and financial pressure.** In 2025, the Italian fashion sector made progress in addressing ESG issues, with the most significant improvements observed among smaller companies — particularly those subject to stricter financial oversight or supported by dedicated sustainability professionals. However, most fashion companies still operate based on mere compliance and, compared to other sectors, tend to overestimate their performance.

Solutions

- **The European fashion industry is making progress in circularity, especially at the end-of-life stage — but will it be enough to address the challenges of overconsumption?** Global fiber production has more than doubled over the past two decades. Consumers in the European Union buy 60% more clothing than in 2000, but keep it for half as long, generating nearly 7 million tons of waste annually. Although collection and recycling rates have improved (51% and 20%, respectively), half of discarded textiles still end up in unsorted waste.
- **Clean tech solutions available in the sector are already mature, but their adoption remains limited due to high upfront costs.** In 66% of cases, the technological solutions available to the industry are ready for deployment — nearly half of European cleantech patents relate to advanced materials.
- **Finance is key to supporting supply chain companies that cannot afford the necessary investments for decarbonization on their own.** Achieving the climate targets set for 2030 will require at least €4.4 billion in additional investments. However, declining margins in the sector make such investments currently unsustainable for nearly 60% of Italian fashion companies.

The **second day** of the *Venice Sustainable Fashion Forum 2025* (October 24) is dedicated to sustainability as a driver of growth. Following the opening remarks by Enrico Giovannini (ASviS) and Laura D’Aprile (Ministry of Environment and Energy Security, Italy) on the theme of circularity, the program explores new consumer behaviors and the role of brands in promoting a more conscious lifestyle, with expert insights and contributions from Ecoalf and OTB. The central part of the day focuses on innovation and tradition as key levers for sustainable fashion, featuring presentations from companies such as Spinnova, ACBC, and Lyria.

The official hashtags for the Forum are: #VeniceSFF #VSFF25

The Venice Sustainable Fashion Forum is realized with the contribution of the Venice Rovigo Chamber of Commerce and numerous players across the extended sector: Alperia, Give Back Beauty, Greenberg Traurig, UniCredit, Unisalute, D.B. Group, Acimit, Bemberg™ by Asahi Kasei Fiber Italia, Centrocot, Confindustria Moda Linen Section, Guess Europe, Fondazione Leaf & Consorzio Physis, Lyria, Pattern Group, ACBC and Surge.

Confindustria Moda is one of the largest representative organizations for textile and fashion manufacturers in the Western world. The Federation represents a sector with nearly 400,000 employees and over 38,500 companies, a fundamental component of Italy's and Europe's economic and manufacturing fabric. It protects and promotes the sector's interests and, exclusively, represents the entire supply chain nationally and internationally in relations with institutions, public administrations, and economic, political, trade union and social organizations. It is the national category federation—strongly integrated with local territories—affiliated with Confindustria and the most representative founding member of EURATEX, the European Apparel and Textile Confederation.

TEHA Group, a subsidiary of **The European House – Ambrosetti**, employs about 330 people and has been active since 1965, growing significantly through the contribution of many Partners, with numerous activities in Italy, Europe and worldwide. The Group is widely present across Italy with several foreign offices and partnerships. Its core strength is supporting companies in the integrated and synergistic management of four critical value-generation dynamics: Seeing, Designing, Implementing and Enhancing. Each year, TEHA serves around 1,500 clients, delivering 400+ strategic studies and scenarios for national and European institutions and companies, and approximately 120 projects for family businesses. It involves about 3,500 experts annually across 850 events, supporting over 18,000 managers. Since 2013, TEHA Group has been ranked among "Best Private Think Tanks"—#1 in Italy, #4 in the EU, and among the most respected independent think tanks globally out of 11,175 (source: *Global Go To Think Tanks Report*, University of Pennsylvania). TEHA Group has also been recognized by the Top Employers Institute as one of Italy's Top Employer 2025 organizations. More information: www.ambrosetti.eu

Confindustria Veneto Est (CVE) is the association of industrial and innovative service companies operating across the metropolitan area of Venice, Padua, Rovigo and Treviso. By size and representation, it is the second-largest association within the Confindustria system, with 5,114 companies producing goods and services across 21 sectors and over 281,000 employees. It operates in a key region for Italian enterprise and the national economy—advanced manufacturing with international outlook, technological innovation and tourism—with an aggregate GDP of €102.8bn, 1.3m employees (including 450k in industry) and €37.2bn in exports. CVE represents members' interests before local, national and international institutions; public administrations; economic and social organizations; schools, universities and research; and finance—supporting industrial policy at regional, national and EU levels. With 150 professionals and dedicated business units, it offers integrated specialist services across all business areas, supporting SMEs and large companies through the green and digital transitions and ESG initiatives, for territorial development and attractiveness. Since 2022 it has organized the annual Sustainability Week and is gender-equality certified.

∞ ∞ ∞

Press contacts

CONFINDUSTRIA MODA

Cristina Fava +39 335628187

crisfava@bravocomunicazione.com

comunicazionecm@confindustriamoda.it

TEHA Group

Fabiola Gnocchi +39 3497510840

fabiola.gnocchi@ambrosetti.eu

Confindustria Veneto Est

Sandro Sanseverinatti +39 3483403738

s.sanseverinatti@confindustriavenest.it

stampa@confindustriavenest.it