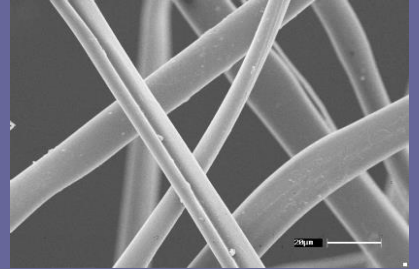




# Towards European Sericulture



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AIUFFASS Silk Section



## Key figures

- 3,000 tonnes of raw and thrown Silk imported into the EU (mainly from China) to be transformed in Europe
- The largest concentration of companies in two main European Regions: Lombardy in Italy and Rhône-Alpes in France, almost 200 SMEs
- 20,000 Direct jobs
- €1.6 billion: EU Production of Silk articles
- More than 40% of the production is exported outside of Europe

## Silk Industry in Europe

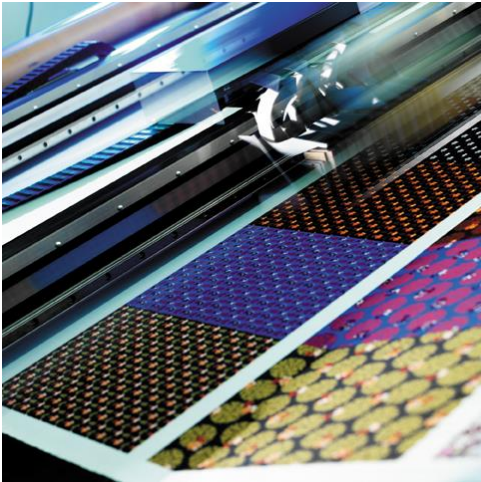


- Silk : the queen of fibers
- European Silk manufacturers:
  - a prestigious image in the world
  - Ambassadors of European values: culture, design, creativity, innovation, know-how and excellence
  - Leaders in Fashion for all the textile industry
- A long tradition since the XII<sup>th</sup> century combined with a strong capacity to innovate
- Apart from Sericulture and the Reeling process, each stage of the value chain is well represented in Europe : silk throwing, weaving, knitting, finishing, etc.



# Why a new sericulture in Europe?

- The EU luxury brands and EU Silk manufacturers are **very concerned by the long term access to high quality raw silk**
  - Dependent on Raw silk supplies mainly from China
  - Growth of needs for high quality raw silk to cover the increasing expectations of the luxury market in the world
  - A decrease in quality level of raw silk
  - A risk of supply shortage



*“Let us have a dream... let’s dream that one day the production of silk yarn could be done in Europe again: our industrial and agriculture strength combined for an European sericulture using the most advanced research and technologies to develop a new innovative high-tech and sustainable industrial field in Europe.”*



# What is the basis for launching a new sericulture in Europe?



- A preliminary Study from September 2014 to May 2015
  - Map the state of the art in the different areas of the world, from sericulture to reeling
  - Identify new ways of producing high grade quality raw silk
- Participants:
  - Steering committee composed of Italian, French, Swiss industrialists of the silk sector (representing *inter alia* HTH, Marzotto Group etc.)
  - Four experts from Italian and French silk research centres
- Budget: about €180,000
- Partners:
  - Commitment of leading firms and SMEs from the A.I.U.F.F.A.S.S. Silk Section
  - INTERSOIE France (FR), Zurich Silk Association (CH), Ufficio Seta (IT)
  - CRA -Apiculture and Sericulture Unit (IT), Stazione Sperimentale Seta (IT)



# What is the conclusions of the study?

- The historical countries which dominate the raw silk market will have more and more difficulties in the future to guarantee the supply of high grade raw silk compatible with the quality requirements of the European manufacturers.
- The research conditions for the emergence of a real breakthrough in sericulture and in the industrial transformation processes aren't fulfilled in these countries. However, there is high level expertise in each step of raw silk production (moriculture, sericulture, reeling process) in those countries.
- A natural generational change is under way and the expertise of these main countries is in the hands of professionals who are going to retire in the near future.





# What are the steering committee's preliminary conclusions?

- The project “towards European sericulture” is not a dream but a realistic and innovative industrial project based on **two interconnected approaches**:
  - A “**traditional approach**” through the re-appropriation of the knowledge of sericulture from the production of cocoons to reeling.
    - ⇒ Reinforce the technical and scientific resources based in Italy in order to reappropriate the knowledge of sericulture and to prepare sericulture for the future.
  - A “**prospective approach**” to produce high quality raw silk differently, using disruptive technologies and advanced solutions.





# What is next for the New Sericulture project?



Phase 1 : Preliminary Study



Phase 2 : Set up a business model for new raw silk production (genetic & agriculture)  
Define the objectives and requirements for a pilot project to produce differently



Phase 3 : Pilot production line to validate the technical and economic feasibility



Phase 4 : Production on an industrial scale





# What do we expect from EU institutions?



- Technical support for research activities
  - What are the European research capabilities? Can we access European Research skills?
  - Advice and assistance for Phase 2 of the project
- Financial support
  - Research part (genetic and agriculture) of the project to be covered by programme Horizon 2020? Industrial investment to be covered by Juncker Investment plan?
  - How to introduce our project: call for tenders? Application to specific programmes?

## Budget not known at present

- Estimate of Engineering Support for Phase 2: €500,000
- Estimate of Budget for Phase 3 & 4 : About €30 million
  - based on a hypothesis of 20 silk farms
  - a technical Research Center for larval hatching and silkworm nursery
  - within a 20-year timeframe
  - About 120 tonnes per year of estimated raw silk production





# Thank you for your attention!

A.I.U.F.F.A.S.S.

Association Internationale des Utilisateurs de Fils de Filaments Artificiels et Synthétiques et de Soie Naturelle

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