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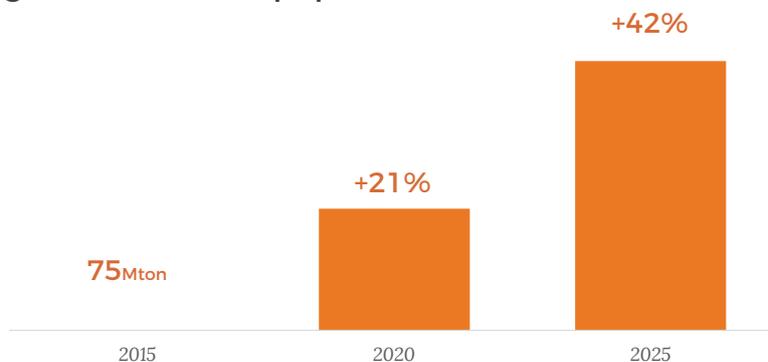


@Orangefiberbrand



OPPORTUNITY: GROWING DEMAND OF TEXTILE PRODUCTS

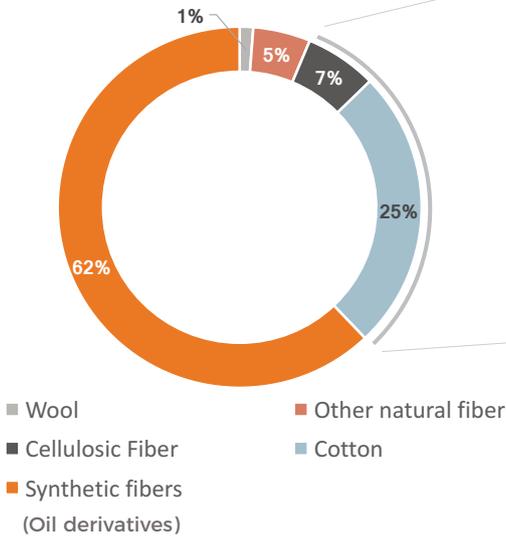
Current textile production - estimated at 75 Million tons -
is expected to grow faster than population and food



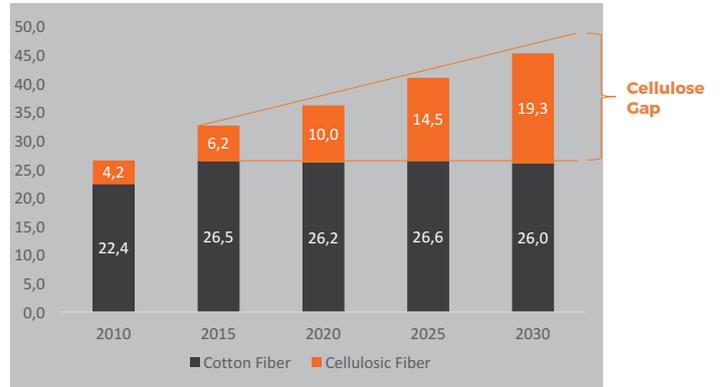


WORLD FIBER MARKET:

World Textile Fiber Consumption



Consumption of Cellulosic and Cotton Fibers in Million Ton



Cellulose Gap: due to available land and high environmental costs, the supply of Cotton fiber will not be able to meet the increasing demand, creating a gap for Cellulosic fibers.

Source: "Eco Fibers Market by Type, by Application and by Region - Global Forecast to 2020" report by MarketsandMarkets



Textile Fibers					
Natural fibers		Man-made fibers			
		From natural polymers		From synthetic polymers	From anorganic polymers
Protein based	Cellulose based	Cellulose based	Protein based		
Wool Silk Angora Cashmere Etc	Cotton Flax Hemp Jute Etc.	Viscose Modal Lyocell Cupro Acetate Etc.	Casein Collagen Ardein Zein	Polyester Polyamide Polypropylene Polyurethan (elastan) Acrylic Polytetrafluoret hylene	
				Carbon Ceramics Glass Metal	

Orange Fiber
Cellulose Fiber from citrus
Artificial (Natural, non-Synthetic)

Source: Lenzing Investor Presentation - Full year results 2015 March 23, 2016 and Eco Fibers report by organicexchange.org



ORANGE FIBER

A SUSTAINABLE MATERIAL FOR FASHION

made with a patented cellulosic fiber
from citrus byproducts
alternative to wood consumption

FROM A RENEWABLE SOURCE

- 60% of the weight of an orange is considered waste (after juice production)
- Italy produces 700.000 Tons of citrus byproducts every year
- 80% of orange juice production is from the US (patent granted), Brazil and Mexico (patent pending)



SUSTAINABILITY MARKET TREND

THE STATE OF FASHION 2018

DISRUPTIONS	GLOBAL ECONOMY			CONSUMER SHIFTS			THE FASHION SYSTEM			
	<ul style="list-style-type: none"> - Volatility and uncertainty - Global interconnectedness and competition - Growth shift from West to South and East - Disruptive technologies with accelerated adoption - Urbanisation 			<ul style="list-style-type: none"> - Connected and in control - Seamlessly move omnichannel during shopping journey - Expecting zero friction - Sharing peer-to-peer: information, reviews, opinions - Expecting it all: convenience, quality, values orientation, newness and price 			<ul style="list-style-type: none"> - Digitisation across the value chain, with redefined cost structure - Accelerated industry pace: Leaders push the limits of time from design to shelf - Brands experimenting with direct-to-consumer - New innovative business models - Brick-and-mortar traffic in decline - reinventing the store - Proliferation of data, providing business opportunities and challenges in control and security 			
TRENDS	01. Predictably unpredictable	02. Globalisation reboot	03. Asian trailblazers	04. Getting personal	05. Platforms first	06. Mobile obsessed	07. AI gets real	08. Sustainability credibility	09. Off-price deception	10. Startup thinking
	Geopolitical turmoil, economic uncertainty and unpredictability are the new normal.	Despite the rise of nationalism, isolationist rhetoric and reshoring, globalisation will not stall.	Asian players will assert their power and leadership even more through pioneering innovations and global-scale investment and expansion.	Personalisation and curation will become more important to the customer.	The question for fashion brands is no longer "if" but "how" to collaborate with big online platforms.	As consumers' obsession with mobile grows, the end-to-end transaction will also move to mobile.	Leading innovators will reveal the possibilities of artificial intelligence across all parts of the fashion value chain.	Sustainability will evolve to be an integral part of the planning system where circular economy principles are embedded throughout the value chain.	Off-price sector growth continues to be driven by the notion that it provides a solution to challenges like excess stock and slow growth.	Due to an urgent and intense need for innovation across the industry, a growing number of fashion companies will aim to emulate the qualities of startups.

The State of Fashion 2018 - Mc Kinsey



OUR UNIQUE SELLING POINT



Sustainability
Orange juice secondary product

O + F + R



Ingredient Brand
Communicate directly to end-consumers

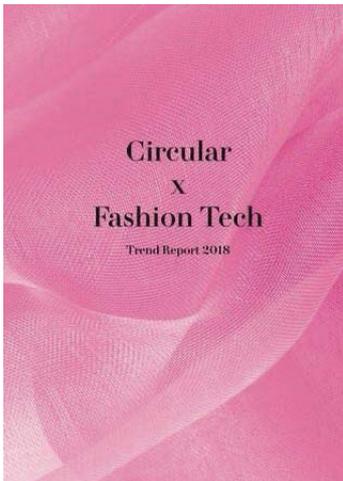


 FERRAGAMO ORANGE FIBER COLLECTION

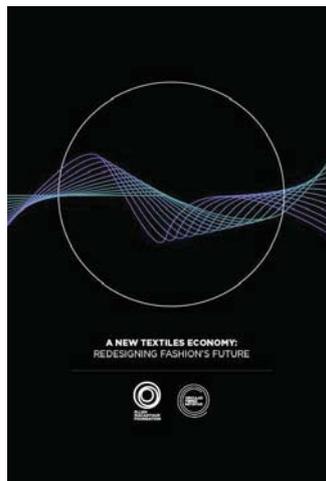


15

 INDUSTRY FEATURED PUBLICATIONS



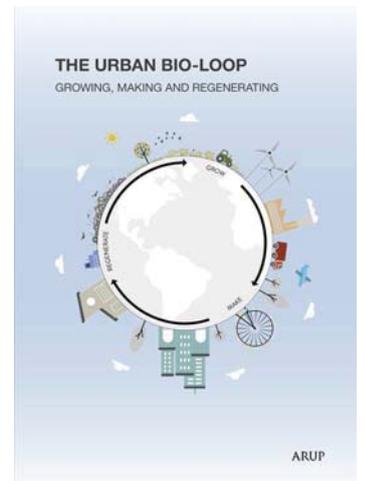
H&M FOUNDATION & ACCENTURE - 2018



ELLEN MACARTHUR FOUNDATION & CIRCULAR FIBRES INITIATIVE - 2017



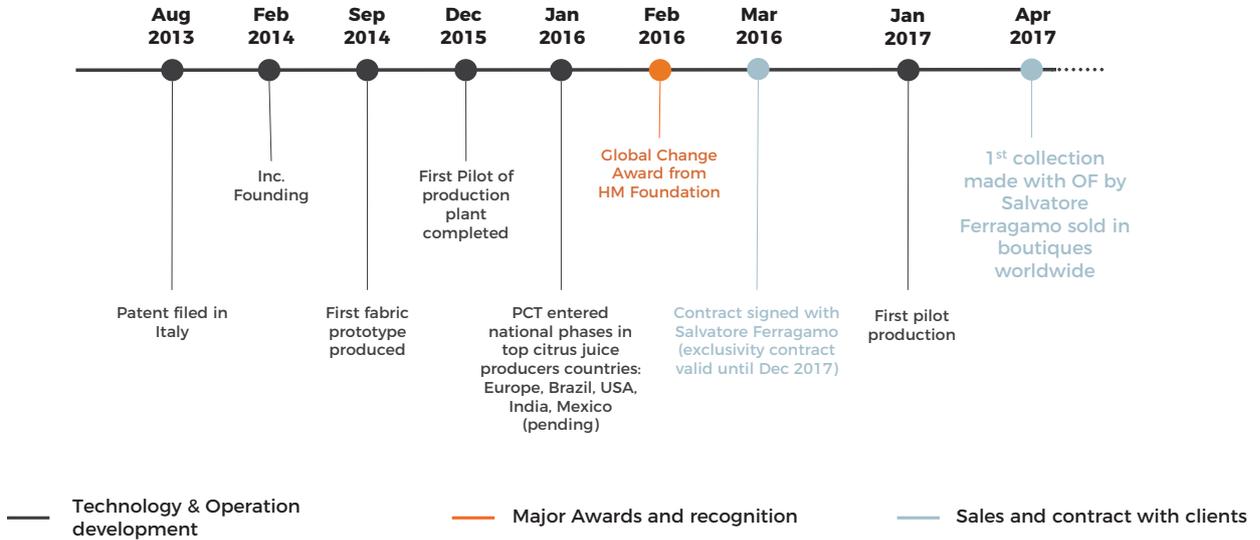
GREENPEACE - 2017



ARUP - 2017



FROM PATENT TO FIRST GLOBAL COLLECTION



WORLD LEVEL AWARDS & RECOGNITIONS



Fashion for Good - Plug & Play Accelerator Program Batch 3, 2018 - Fashion for Good, Plug & Play, C&A.



Nomination for Premio Compasso d'Oro 2016 (Business Research) - ADI Associazione per il Disegno Industriale.



Technology and Innovation Award - Green Carpet Fashion Awards Italia 2017, Camera Nazionale della Moda Italiana, Eco Age.



Premio per l'Innovazione 2015 ADI DESIGN INDEX - ADI Associazione per il Disegno Industriale.



Winner of Global Change Award 2015 - H&M Foundation. €150k & 1 year accelerator program - Accenture, KTH Royal Institute of Technology in Stockholm.



EY Entrepreneurial Winning Women EU Class of 2016 - Ernst & Young Global Limited..



ITMA Future Materials Awards 2015 - (Finalist) ITMA.



Premio Nazionale per l'Innovazione "Premio dei Premi" 2016 (Italian Design) - Repubblica Italiana; ADI, Associazione per il Disegno Industriale.



Ideas 4 Change Award 2015 - UNECE Ginevra.



ELLE Impact2 for Women 2016 Italy - ELLE, Comptoir de l'Innovation, Gruppo Intesa San Paolo.



Changemakers for EXPO 2015 - Telecom Italia, EXPO 2015, Make a Cube.



“Real luxury is based on authenticity and sincerity – product is almost secondary to the experience. But if your products are not in sync with a higher set of values, then you aren’t going to survive in this business”

Mr. François-Henri Pinault – CEO and Chairman, Kering Group