

The press and research estimates

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For the cluster as a whole the most frequently cited figures come from industry and press sources. In October 2012 the association Ticinomoda, which then represented about fifty companies, estimated the cluster's annual turnover at EUR 10 billion and its workforce at nearly 4,500 people of 28 nationalities.¹ In May 2013 the Istituto di Ricerche Economiche (IRE) of the Università della Svizzera italiana prepared a study for the State Secretariat for Economic Affairs (SECO). It described a "Fashion Valley" extending from Lugano to Mendrisio, with a logistics specialization concentrated in the Mendrisio-Chiasso area. The firms surveyed cited stable institutions, access to a qualified Italian workforce, favourable taxation, infrastructure, the proximity of Milan and a shared textile tradition as reasons for their location.² In 2018 the news portal *Tio.ch* gave a breakdown for 2013: 120 manufacturing companies with 1,527 employees, 183 wholesale firms with 2,640 employees and 191 logistics and retail operations with 3,660 employees, about 8,000 persons in all.³

These figures should be used with care. They come from different years, count companies on different definitions and include retail jobs that have little to do with the trading and logistics model. They agree, however, on an order of magnitude of 4,000 to 8,000 jobs between 2004 and 2014. They also agree that the cluster's share of the cantonal corporate tax base was large in relation to the number of companies. In a canton of about 350,000 inhabitants, a cluster of this size was a matter of public finance as much as of industrial policy.⁴

Indicator Value Year
Textile, clothing, leather manufacturing 175 2016
(enterprises) Employees in the same sector 2,228 2016
Median gross wage in the same sector CHF 3,331/month 2016
Frontalieri in the same sector 1,493 2017
Fashion cluster employment (press estimate) about 8,000 2013
Fashion cluster tax revenue (press estimate) about CHF 90 c. 2013–2017
million/year

In figures. The manufacture of textiles, clothing and leather goods counted 175 enterprises and 2,228 employees in Ticino in 2016, with a median gross wage of CHF 3,331 a month and about two-thirds of the workforce commuting from Italy.⁵ Wholesale and retail trade employed 15.4 per cent of the cantonal workforce in 2012, against 13.4 per cent nationally.⁶ The fashion cluster as a whole was estimated at about 8,000 jobs and a business volume of CHF 10 billion in 2013, and at about CHF 90 million of tax revenue a year.⁷ Kering's LGI alone employed about 900 persons in Ticino in 2018.⁸

1 What the figures do not show

The statistics leave three questions open. First, they do not show value added. A principal company with a few hundred employees that resells goods worth several billion francs may generate a profit far larger than its payroll, and that profit, which drives tax revenue, does not appear in employment data. Second, they do not show where the profit would have been taxed in the absence of the Ticino structure. The political debate in Ticino often treated the tax revenue of the fashion groups as an addition to the cantonal economy, while the Italian tax authorities treated part of it as a diversion of Italian taxable income. Third, the figures say little about the quality of the jobs. A logistics hall that employs several hundred warehouse workers on wages near the cantonal minimum creates a different kind of employment from a design centre with highly paid specialists. Both differ from a booking company with twenty employees and a large balance sheet. The following sections therefore look behind the aggregate figures at individual companies and at the legal construction of their business.⁹

2 Notes

1. FashionNetwork, "Italian-speaking Switzerland, strategic hub for brands" (17 October 2012), <https://nl.fashionnetwork.com/news/Italian-speaking-switzerland-strategic-hub-for-brands,286412.html>. ↩
2. Rico Maggi and Valeria Mini, La catena di valore transfrontaliera: il potenziale dei sistemi integrati di produzione (IRE, Università della Svizzera italiana, report for SECO, May 2013), <https://www.ire.usi.ch/storage/app/media/ode-rapporto-seco-moda-2013.pdf>. ↩
3. Tio.ch (7 October 2018, above). ↩

4. Ufficio di statistica del Cantone Ticino (USTAT), Il Ticino in cifre 2025 (Bellinzona 2025), https://www3.ti.ch/DFE/DR/USTAT/allegati/volume/tic_2025.pdf (permanent resident population of 357,720 in 2023). The figure in the text is a rounded order of magnitude for the period discussed. ↩
5. Walker, I comparti economici (above). ↩
6. Gonzalez and Stephani (above). ↩
7. Tio.ch (7 October 2018, above). ↩
8. RSI (8 October 2018, above). ↩
9. Source as cited in the printed edition. ↩

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