



Trends Observatory

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3D & DIGITAL TWIN

3D technology is transforming the industry along the whole supply chain, from collection development to customer experience.



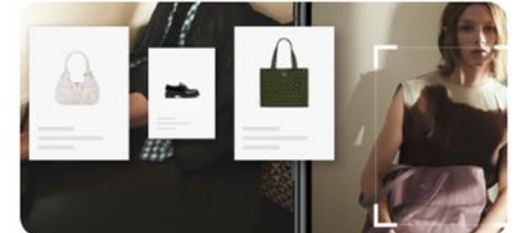
SUSTAINABILITY

Stakeholders' increasing interest for environmental and social issues imply constant efforts towards corporate responsibility to reach a variety of sustainability goals.



WEB3 & ENTERTAINMENT

Virtual environments host immersive experiences and new products, which may complete or constitute alternatives to traditional channels and physical assets.



AI & DATA

AI's latest developments serve different uses, improving potential for creativity, management, and analytics in every field.

3D & DIGITAL TWIN

The integration of 3D technology is transforming the industry, streamlining collection development and enhancing shopping experience. Benefits include not only decreased time and reduced costs, but also higher conversion rates.

Collection Development



Diesel has formalized the use of 3D in its design process instituting a division completely dedicated to it, in order to create inspiring and sustainable fashion through a completely digital journey.

3D Visualisation

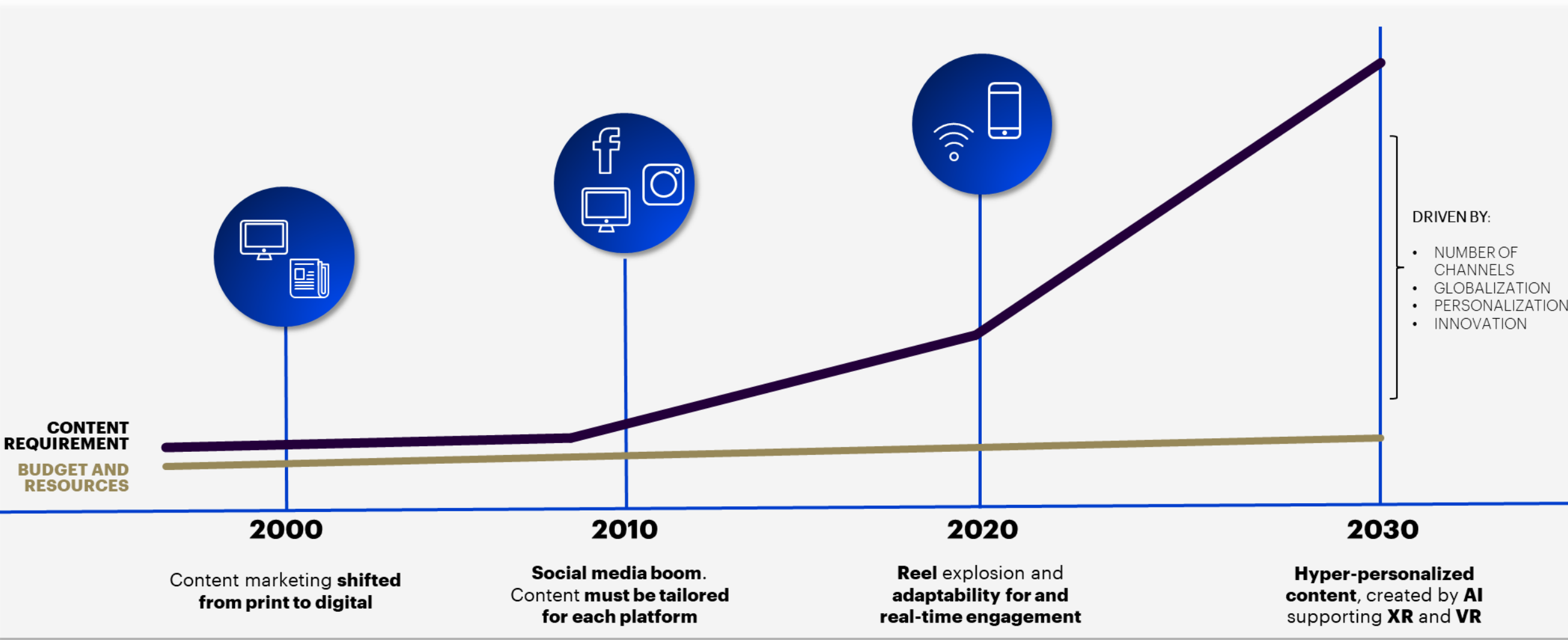


Dior introduced the 3D visualization of some products on its ecommerce, allowing customers to interact with items and explore them in detail from different perspectives.

Content Creation



JD Sports Fashion & The North Face's London video of the Big Ben wearing a black and yellow jacket from the brand leverages CGI technology to create captivating and innovative content that went viral on social media.





SUSTAINABILITY

Customers and regulators are becoming increasingly attentive to environmental and social issues. In the fashion and luxury industry such movements translate into responsible production and consumption practices that benefit both the planet and people.

New Regulation



The European Commission published their Directive for Sustainable and Circular Textiles, a new blueprint that lays out key principles to drive change in the textiles industry.

Traceability



Loewe and Filippa K are partnering with Sheep on Repeat, a project to provide every garment with complete traceability information, accessible through a QR code on product labels.

Digital Passport



Coach bags are equipped also with a digital passport, with the scope of increasing lifecycle transparency, scale circular business models and providing proof of product authenticity.



GOLDEN GOOSE: FORWARD STORE

WEB3 & ENTERTAINMENT

New channels allow users to interact and transact in virtual environments offering more immersive and engaging shopping experiences, mixing virtual and real elements. Brands can exploit them to deliver value and target new audiences.



Dior has launched the new **Dior Spa** at the Lana Hotel in **Dubai**, offering **exclusive treatments** and an **atmosphere of luxury and well-being**.

Dior



Immersive luxury shopping experience debuts on **Apple Vision Pro**

Obsess MYTHERESA



Fendi, in collaboration with **Epic Games**, will launch a **3D tool** in **select stores** that enables **customers to interact and customize products in real-time**

EPIC GAMES FENDI



Zara will expand its **live shopping broadcasts** to the **UK, Europe, and US**, following the **success** of its live shopping experiments in **China**.

ZARA



DOLCE & GABBANA

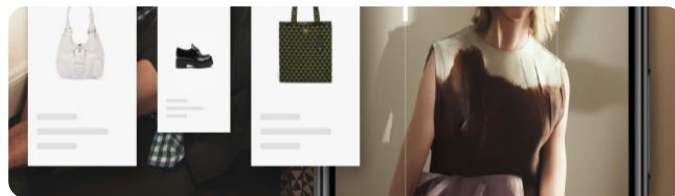
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AI & DATA

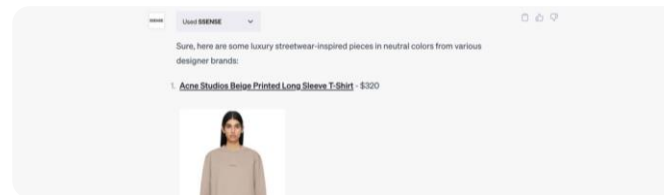
Artificial intelligence and data analysis unlock new possibilities including the enhancement of creativity, the personalization of products and shopping experiences and the creation of contents and products.

Recommendation



Prada partnered with Syte to provide online customers with enhanced search results with visual inspiration and personalized recommendations based on session data and visual AI.

Conversational AI



The luxury online retailer **Ssense** introduced an AI plug-in allowing ChatGPT Plus users to receive shopping assistance from the program.

Creativity



Adidas and Moncler launched a campaign using AI to generate its “Adventurers”-figures and combined it with an immersive experience on Moncler’s website to promote the brands’ new collaboration.

Content Production



Valentino's latest Essential collection was showcased with a bold and innovative campaign, entirely captured using advanced generative AI technology.

What will the *impact* on the fashion value chain be?

FASHION VALUE CHAINS²



AI & Data

3D & DIGITAL VALUE CHAIN



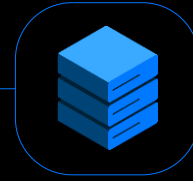
3D COLLECTION DESIGN
(DIGITAL
PRODUCT/DIGITAL TWIN)



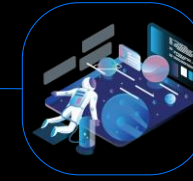
3D VIRTUAL
SHOWROOM



CONTENT
CREATION



REPOSITORY,
INTEROPERABILITY &
PLATFORM
INTEGRATION



3D SPACES CREATION



MARKETING
& CRM

CORE VALUE CHAIN

INTEGRATED PLANNING

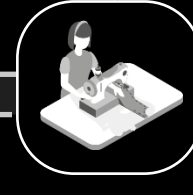


COLLECTION
DEVELOPMENT,
SAMPLING &
SHOOTING



SHOWROOMING, BUYING &
ASSORTMENT

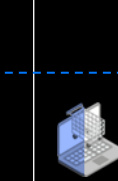
ERP



PRODUCTION
(make/buy)



WAREHOUSE,
DISTRIBUTION & OMS



digital commerce



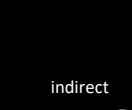
social



Gaming & Metaverse



direct



indirect

SALES CHANNELS



brick and
mortar



repair



customer
service



resell



AFTERSALE



refill



return



recycle

CROSS FUNCTIONS

IT | Innovation | HR | Finance | Security |
Indirect Procurement Etc...



Communication
& Contents

SUSTAINABLE ATTRIBUTES



Sustainable Materials
& Products



ESG Data & Targets



Energy Efficiency & Net
Zero Transition



Logistic
Optimization



UX/UI Sustainability
Experience Online



Circular Services

RFID/NFC

IoT

Blockchain



THANK YOU