

Italian Furniture Industry Sector Outlook and projects by FederlegnoArredo

Roma, 29 June 2018

The sector at a glance

Italy's wood and furniture sector accounts for 8,75% of all manufacturing jobs and 16% of manufacturing businesses:

- **318,519 employees**
- **76,943 companies**
- **41,5 billion turnover**

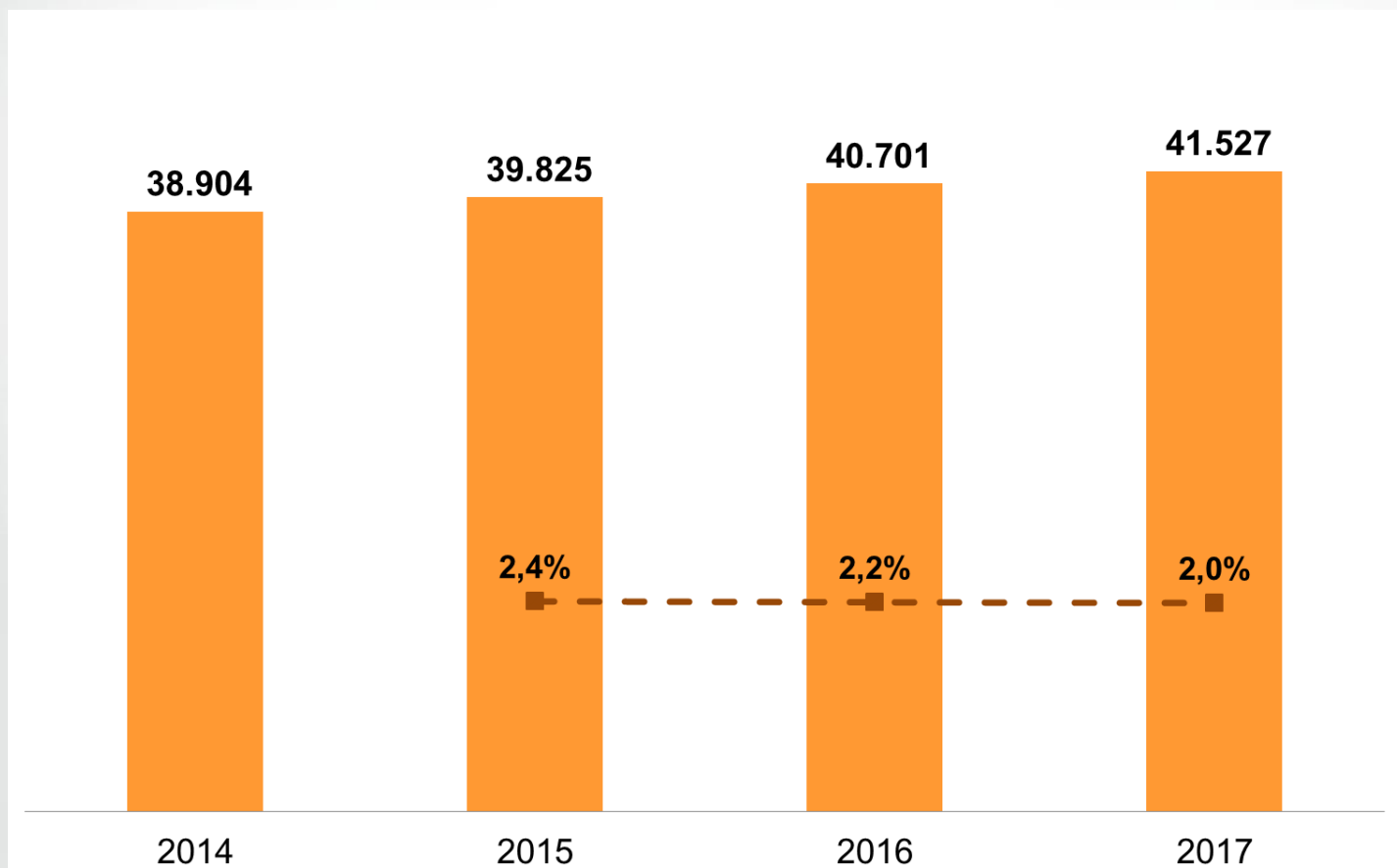
Exports account for 39% of turnover

Wood and Furniture 2017 Data

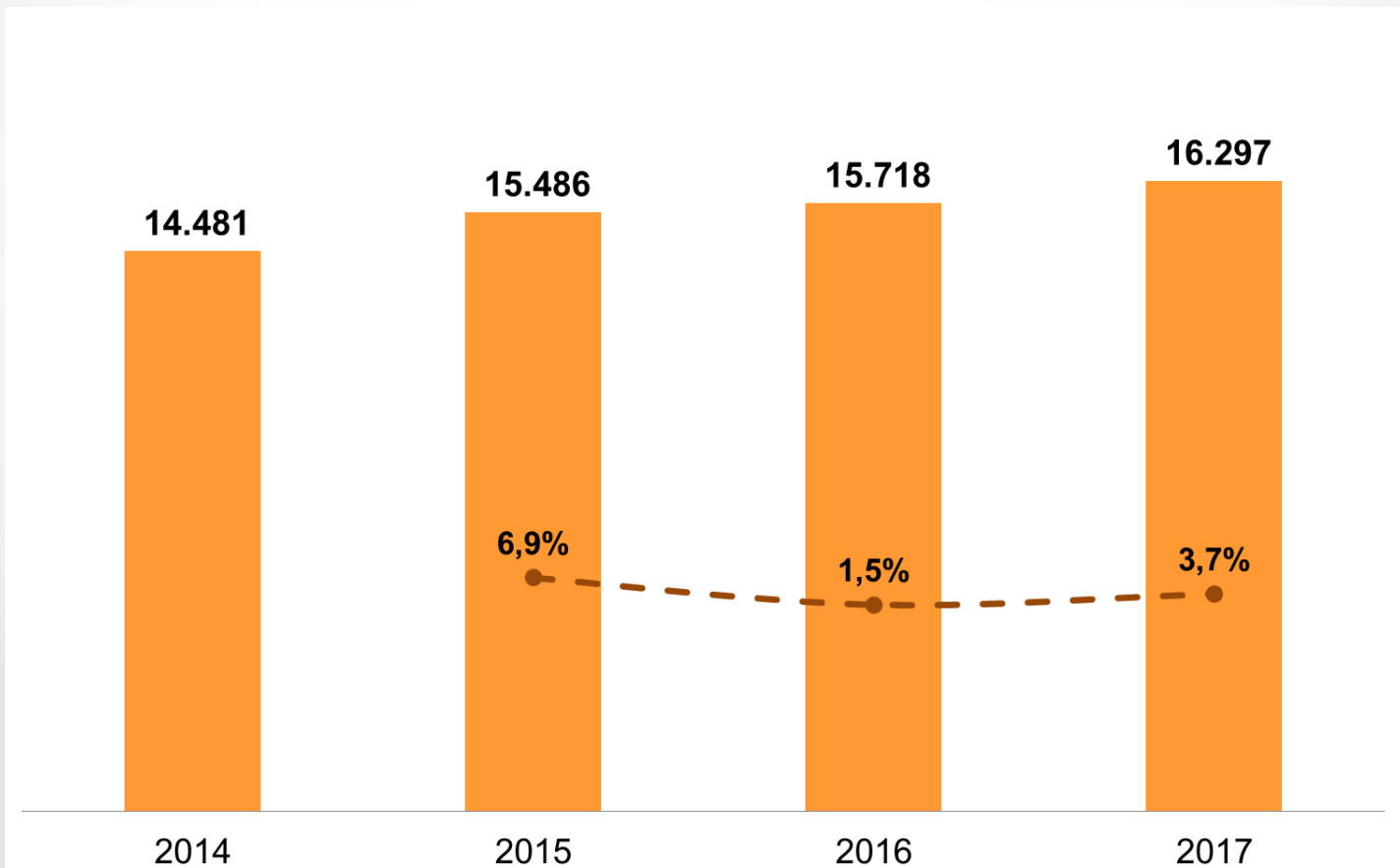
	2016	2017	Var % 2017/2016
TURNOVER	40.701	41.527	+2,0%
EXPORT	15.718	16.297	+3,7%
IMPORT	8.214	8.416	+2,5%
Export/Turnover	38,6%	39,2%	+1,6%
Employees	320.054	318.519	-0,5%
Companies	79.245	76.943	-2,9%

Source: Centro Studi FederlegnoArredo (June 2018), values in mln euros

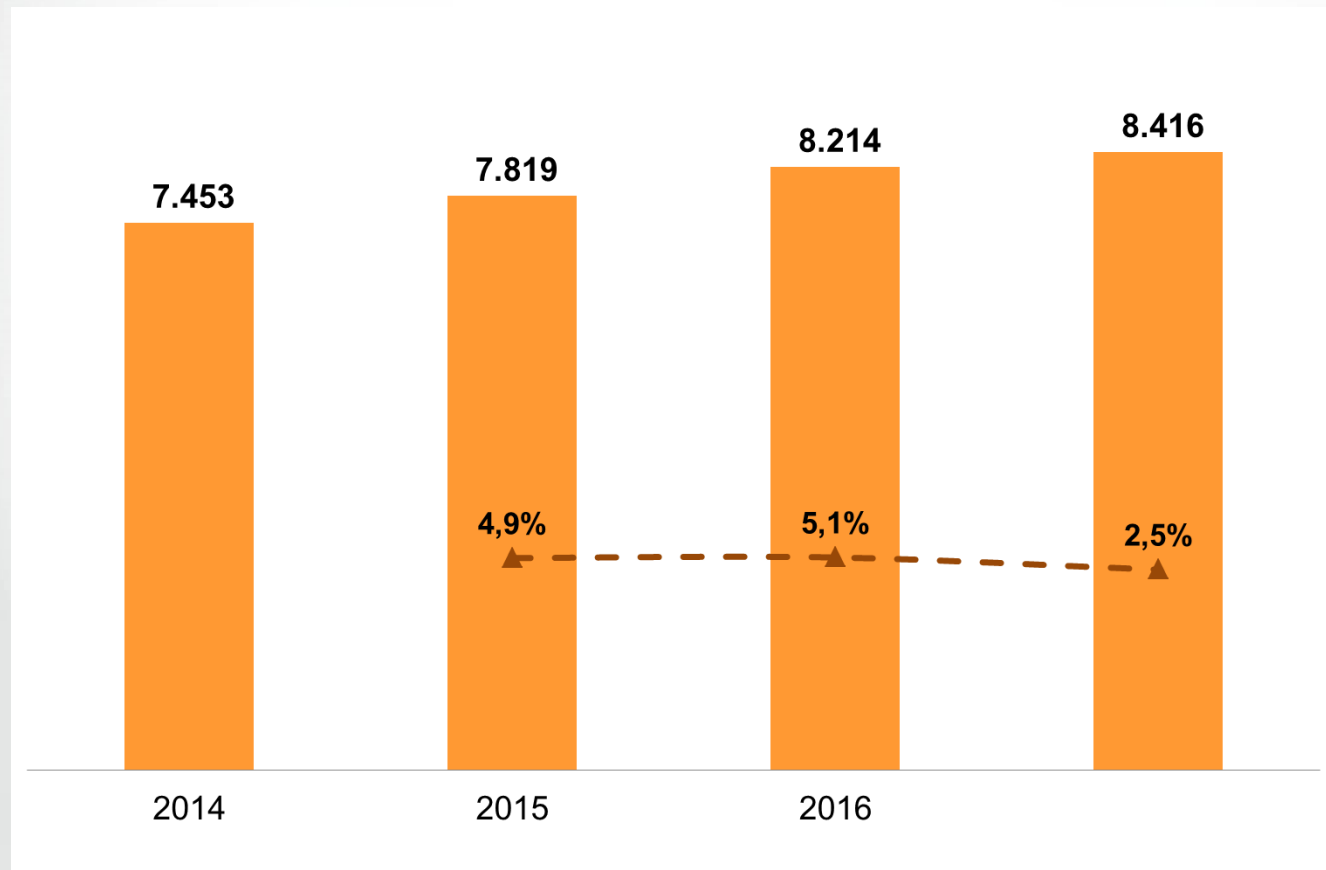
Turnover Wood and Furniture



Export Wood and Furniture



Import Wood and Furniture



First 20 Export markets

Esportazioni italiane per Paesi di destinazione nel periodo Gennaio-Dicembre 2017

Variazioni % rispetto al corrispondente periodo dell'anno precedente. Dati 2017 provvisori. Dati 2016 definitivi.

PAESE	Milioni di Euro	Var. %
1 Francia	2.456,01	6,4%
2 Germania	1.794,15	0,7%
3 Stati Uniti	1.388,65	4,0%
4 Regno Unito	1.290,90	-2,8%
5 Svizzera	753,66	0,1%
6 Spagna	608,36	3,4%
7 Cina	606,86	40,7%
8 Russia	529,92	-5,0%
9 Belgio	398,74	5,9%
10 Emirati Arabi Uniti	368,87	-5,9%
11 Austria	355,15	0,6%
12 Paesi Bassi	308,93	4,2%
13 Arabia Saudita	253,54	-6,6%
14 Polonia	243,13	16,0%
15 Israele	213,31	5,6%
16 Canada	193,05	8,0%
17 Australia	186,28	6,0%
18 Svezia	169,86	5,2%
19 Qatar	164,87	7,3%
20 Grecia	155,89	1,2%

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Represents the entire sector, from raw materials to the **finished product, in Italy and throughout the world.**

Operates out of Milan HQ and offices in Rome and Brussels.
Desks in Miami and Shanghai.

2,400 member companies, from industry leaders to small businesses.
11 associations, 5 affiliated associations + Young Entrepreneurs Group.

SERVICES to our enterprises:

Expand the international business



Export support (B2Bs)

Market insights



Research Centre , Wood market Observatory

Regulatory focus,
Low-interest loans



Regulations / Environment and Safety,

Up-skilling
IPRs



Special agreements
Education and training



Design protection



Our International Fairs

FederlegnoArredo is the owner and manager of 4 international fairs of furniture and related products

- Salone del Mobile.Milano (april)

435,065 attendees from **188 different countries** (+26% compared with the 2017 edition) in six days.

Two spin-off:

- Salone del Mobile. Milano Moscow (in October)
 - Salone del Mobile. Milano Shanghai (in November)
-
- MADE Expo (biannual)

Special Projects: Polo Formativo

VET School, Lentate sul Seveso (MB, Italy)

Vocational Training

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Higher Education

Lifelong Learning

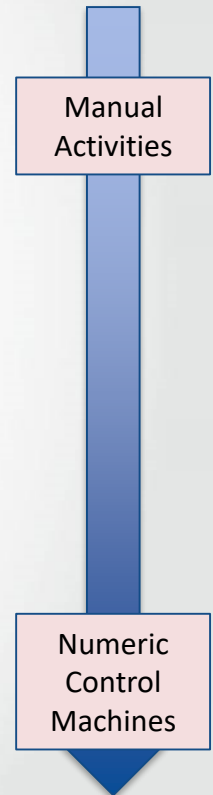


**POLO
FORMATIVO
LEGNOARREDO**

Fondazione ITS Rosario Messina

Vocational Training: Machine Operator Profile

	Competences
1	Planning, organizational skills
2	Manufacturing for the wood-furniture value chain
3	Assembling and finishing
4	Quality and safety control



Higher Education: Export manager Profile

	Competences
1	Knowledge of raw materials, semi-finished products and final products of the wood-furniture sector
2	Knowledge of production processes
3	Knowledge of international marketing principles and their application within the furniture sector
4	Knowledge of principles of interior design
5	Language skills

Thank you