01-A2
MAPPING THE FURNITURE INDUSTRY
FOR EACH EUROPEAN COUNTRY
INTRODUCTION

- The objective of the point 01-A2 of the project is to mapping the current business situation related to the european furniture industry.

- To facilitate the recruitment of information, a document format has been developed and filled-in by all the partners.

- The information has been collected into a Report.

- This part of the project represents a fundamental aspect for the comprehension of the future scenarios in the furniture sector.
PARTNERS

AIDIMA · CFPIMM · COSMOB · FEVAMA · FONDAZIONE ENAIP LOMBARDIA · INNOVAWOOD · ITD

Each partner collect information related to the actual situation of the furniture sector in

5 countries involved:

• Belgium
• Italy
• Poland
• Portugal
• Spain
A document allows all the partners to describe, with numbers and information, the actual situation of the furniture industry.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PORTUGAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>FURNITURE SECTOR</td>
<td>Number of companies</td>
</tr>
<tr>
<td></td>
<td>Furniture Industry – Number of companies: 2072</td>
</tr>
<tr>
<td></td>
<td>31010 – Office furniture industry (number of companies: 165)</td>
</tr>
<tr>
<td></td>
<td>310901 – Kitchen furniture industry (number of companies: 367)</td>
</tr>
<tr>
<td></td>
<td>31091 – Furniture industry for other purposes (number of companies: 1402)</td>
</tr>
<tr>
<td></td>
<td>310902 – Metallurgical furniture for other purposes (number of companies: 62)</td>
</tr>
<tr>
<td></td>
<td>310902 – Furniture with other materials for other purposes (number of companies: 76)</td>
</tr>
</tbody>
</table>

(Data: Internal Base of Furniture Industries, ADIM, 2015)

Evolution in the last 5 years (% increase or decrease)

- Decreased approximately 18%

(Estimated data from Technical Services of OFPMM, 2014)

Value of production in EUR

Furniture Industry (sales volume):
1.3 billion €

(Data: APMF, 2014)

Companies distribution by size

- Less than 10 employees: 49%
- 10 – 49 employees: 41%
- 50 – 249 employees: 15%
- 250 or more employees: 4%
FURNITURE INDUSTRY ANALYSIS

1. Number of companies
2. Evolution in the last 5 years
3. Value of production in EUR
4. Companies distribution by size
5. Distribution by type of product
6. Materials used and % if possible
7. Technology in the companies
8. Companies regular departments
9. Furniture training: studies levels
10. Training and qualifications
11. Exporting companies
12. Main export destinations
13. Type of exported products
14. Importance of the contract furniture
15. The furniture sales, are carried out in own stores or through distributors?
1. NUMBER OF COMPANIES
in the furniture sector

*About 67,000 belonging to the furniture sector, 30,327 producing furniture
2. EVOLUTION IN THE LAST FIVE YEARS

% of increase or decrease

- 56.8% 2007/2013
- 18% 2009/2014
- 6.7% 2009/2014
0.6% 2009/2014
+ 2.37% 2010/2014
### 3. VALUE OF PRODUCTION in EUR

<table>
<thead>
<tr>
<th>Country</th>
<th>Value (Million €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>26.000</td>
</tr>
<tr>
<td>Poland</td>
<td>7.491</td>
</tr>
<tr>
<td>Spain</td>
<td>3.830</td>
</tr>
<tr>
<td>Belgium</td>
<td>2.340</td>
</tr>
<tr>
<td>Portugal</td>
<td>1.300</td>
</tr>
</tbody>
</table>
The furniture industry is characterized by a majority of SMEs, with a significant number of companies having less than 50 employees (95%).
5. DISTRIBUTION BY TYPE OF PRODUCT

A. Number of companies

- Other purpose: 1,462
  - Office: 105
  - Kitchen: 347
- Other purpose: 10,568
  - Office: 6,037
  - Kitchen: 6,889
5. DISTRIBUTION BY TYPE OF PRODUCT

B. Volume of production

- **Spain**
  - 63% Other (home furniture)
  - 18% Kitchen
  - 11% Office
  - 8% Bathrooms

- **Belgium**
  - 44% Other indoor and outdoor
  - 23% Kitchen
  - 17% Office
  - 16% Matresses

- **Italy**
  - 18% Other
  - 16% Kitchens
  - 14% Bedrooms
  - 14% Sofas
  - 12% Offices
  - 11% Bathrooms
  - 11% Livingrooms

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6. MATERIALS USED

1° BOARD
- Particle boards: 66%
- Dry-process fiberboards: 15%
- Saw wood: 13%
- Plywood and core plywood: 3%
- Other: 3%

2° WOOD
- Glass: 59%
- Steel: 8%
- Aluminium: 6%
- Paper and paperboards: 5%
- Iron and other metals: 4%
- Plastics: 1%
- Other: 1%

3° COMPOSITE MATERIALS
- Boards and Wood
- Non-Wooden raw materials
7. TECHNOLOGY IN THE COMPANIES

Automatic or manual manufacturing processes

“Processes that can be automated have been to the extent as practically/economically feasible. Certain processes, however, remain manuals, in particular in the area of upholstery.”
8. COMPANIES REGULAR DEPARTMENT

- Management
- Marketing
- Technical office
- Production section
- Packaging
- Transport

Depending of the size, the biggest do have all these departments.

Over 2/3 are artisanal and often family-run companies. Basic organizational structure where different roles often coincide in the same person.

All these departments are present in most of the furniture companies, an exception could be the technical office, more common in medium and big companies.

Medium and big companies have all the departments. In small companies these different role coincide in one person.

Not all the companies have a technical office, depends on size.
9. FURNITURE TRAINING
Studies levels (from basic to PhD)

Management: higher education.
Low level education of the employees.

- Management
  higher education/secondary level

- Marketing
  higher education/secondary level education in marketing

- Technical office
  higher education in different specializations.

- Production section
  primary and secondary level education
  (professional education preferred)

- Packaging
  primary and secondary level education
  (professional education preferred)

- Transport
  primary and secondary level

No specific degree. University offer specialized courses as:
- Interior design
- Architecture
- Industrial design.

Low level of training and specialization compared to other manufacturing sector.

- Direct furniture production skills:
  - Furniture builder (interior elements)
  - Furniture producer
  - Furniture upholsterer (and for automotive industry)

- Indirect furniture production skills:
  - Warehouse assistant
  - Maintenance technician
  - Electro mechanic
  - Fork lift operator
  - Operator (cutting/production/assistant production/process/responsible) department textile, confection and furniture upholsterer
  - Warehouse manager
  - Truck driver

- Indirect furniture production skills (under development):
  - Responsible production
  - Calculator
  - Entrepreneur
  - Packaging
  - Technical commercial assistant
  - Packaging operator
  - Restoration of antic furniture

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MAPPING THE FURNITURE INDUSTRY FOR EACH EU COUNTRY
10. TRAINING AND QUALIFICATIONS
related to the furniture sector

1. Vocational Training (3 years)
   - Woodworking and wood carving
   - Interior designer
   - Refurbishment of furniture
   - Modern and design furniture
   - Furniture garnishments
   - Grey worker + Furniture upholsterer
   - Mechanical woodworking + Assistant furniture producer
   - Furniture producer + Assistant int. builder

2. Higher education: None specific for furniture industry:
   - Material and product design
   - Bio-engineering (wood technology)
   - Engineering (product design)

1. Certificates of Professionalism: wood and furniture sector.
2. Vocational Training Cycles
   - Professional title of basic carpentry and furniture
   - Technician in joinery and furniture
   - Technical installation and furnishing
   - Technician in design and furnishing

3. Higher Education: Wood technology faculties in cooperation with technical universities or university of fine arts.

1. Post-diploma training courses (1-2 years)
   - Technical design and industrial design
   - Technical production of furniture

2. Vocational Training Cycles (3-4 years)
   - Operator of the wood
   - Wood technician

3. Higher Education:
   - None specific for furniture sector.

1. Certificates of Professionalism: wood and furniture sector.
2. Vocational Training Cycles
   - Professional title of basic carpentry and furniture
   - Technician in joinery and furniture
   - Technical installation and furnishing
   - Technician in design and furnishing


1. Polytechnic Institute
   1. Vocational Training Centre:
      - Wood and furniture
11. PERCENTAGE OF EXPORTING COMPANIES

Most furniture companies produce for export.

- Belgium: 90%
- Italy: 80%
- Portugal: 41%
- Spain: 25%

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## 12. MAIN EXPORT DESTINATIONS

<table>
<thead>
<tr>
<th>Region</th>
<th>Destinations</th>
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</thead>
<tbody>
<tr>
<td><strong>EU</strong></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>76.5%</td>
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<tr>
<td>Germany</td>
<td>17%</td>
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<td>UK</td>
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<tr>
<td>Russia</td>
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<tr>
<td>Switzerland</td>
<td>7%</td>
</tr>
<tr>
<td>Asia</td>
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<tr>
<td>North America</td>
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<tr>
<td>USA</td>
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</tr>
<tr>
<td>Mid. East</td>
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</tr>
<tr>
<td>Africa</td>
<td>3.3%</td>
</tr>
<tr>
<td>C. &amp; S. America</td>
<td>1.5%</td>
</tr>
<tr>
<td><strong>EU</strong></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>39%</td>
</tr>
<tr>
<td>Germany</td>
<td>7%</td>
</tr>
<tr>
<td>UK</td>
<td>6%</td>
</tr>
<tr>
<td><strong>EU</strong></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>26%</td>
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<tr>
<td>Spain</td>
<td>26%</td>
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<tr>
<td>Germany</td>
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<td>Sweden</td>
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<td>Belgium</td>
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<td><strong>North America</strong></td>
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<td>USA</td>
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<td>Mexico</td>
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<td>Saudi Arabia</td>
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<td>Germany</td>
<td>8%</td>
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<tr>
<td>UK</td>
<td>5.6%</td>
</tr>
<tr>
<td>Italy</td>
<td>3.2%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3.2%</td>
</tr>
<tr>
<td><strong>Africa</strong></td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>3%</td>
</tr>
</tbody>
</table>

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13. TYPE OF EXPORTED PRODUCTS

- **Seats**: 21%
- **Other**: 16%
- **Offices**: 9%
- **Outdoor**: 8%
- **Living rooms**: 5%
- **Bathrooms**: 7%
- **Kitchens**: 5%
- **Bedrooms**: 21%

- **Other**: 60%
- **Seats**: 22%
- **Living rooms**: 9%
- **Bedrooms**: 5%
- **Office**: 2%
- **Kitchen**: 1%
- **Shop furniture**: 1%

- **Seats**: 46%
- **Home furniture**: 46%
- **Other**: 8%
14. IMPORTANCE OF CONTRACT FURNITURE of exporting companies

For medium and big companies contracts constitute a significant portion of exports.

Contracts involved 8% of the sales in 2013.

Approximately 15% of companies have contracts.
15. THE FURNITURE SALES

The furniture sales, are carried out in own stores or through distributors?
CONCLUSIONS

- The actual crisis, started in 2007, led companies into a strong decrease in terms of development.

- The furniture industry is characterized by a majority of SMEs with less than 50 or even less than 10 employees each.

- The production processes have been widely made automatic.

- Companies regular departments depend on the size; for the majority of SMEs a single person covers several roles for different areas.

- The level of studies about furniture training is not defined because there’s not an univocal reference; in fact there’s different specializations, especially for higher education.

- Most furniture companies produce for export: from 40% to 90%. Main destinations are EU countries and US.

- Contract constitute a significant portion of exports but mostly for medium and big companies.
Comparing non-heterogeneous data makes the analysis more complex.
Developing a Google Form could make the “04- Self-assessment skills system” much more easier to compile, circumscribing the information collected.
SUGGESTIONS

- In Google Form answers are automatically collected into an Excel document format.
SUGGESTIONS

- Charts and diagrams are automatically generated allowing an immediate comprehension.
THANKS FOR YOUR KIND ATTENTION