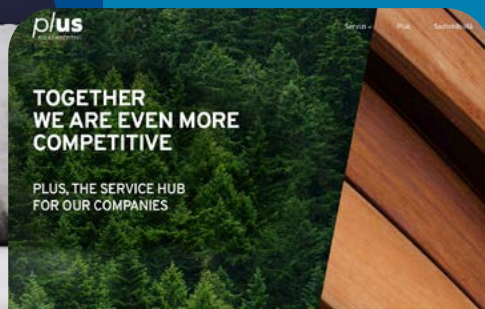




THE ADDED VALUE OF **SUSTAINABILITY**



FEDERLEGNOARREDO

FederlegnoArredo is the **Italian Federation of wood, cork, furniture, lighting and furnishing industries**. It forms part of the Confindustria system and has been **championing Italian know-how** since 1945, underpinning the development of businesses, and acting as an ambassador for the **Italian style of living** all over the world. There are **eleven product divisions** within FederlegnoArredo, representing all the components of the wood-furnishing supply chain, from the raw material to the finished product. It has been committed to supporting the development of its member companies since 1945, representing them in Italian and European institutions and promoting the **industrial policy of the sector** and the quality of Made in Italy around the world.

It supports an innovative, internationalised, sustainable **business system** capable of promoting the economic, social, civil and cultural growth of the country.

It holds a **100%** stake in Federlegno Arredo Eventi SpA, the company that promotes and organises the **Salone del Mobile.Milano**, set up in 1961 by a small but enlightened group of wood-furniture entrepreneurs, which soon became the design world's most keenly-awaited event at international level.



THE SUPPLY CHAIN • THE FIGURES



68,014 companies



297,921 employees



€56.6 billion turnover



€21 billion exports

Source: FederlegnoArredo Study Centre, 2022 Annual Statement

FURNISHING MACROSYSTEM

21,748 companies

140,293 employees

€29 billion turnover

€15.3 billion exports



WOOD MACROSYSTEM

46,266 companies

157,628 employees

€27.6 billion turnover

€5.7 billion exports

Source: FederlegnoArredo Study Centre, 2022 Annual Statement



THE PRODUCTIVE FABRIC

Design and sustainability are what make wood-furnishing one of the pillars of Made in Italy. A manufacturing world deeply rooted in the territory and made up of excellence and entrepreneurs dedicated to innovation.

The supply chain's productive fabric is **largely made up of SMEs**, with close links to the larger manufacturing companies, capable of driving Italian quality throughout the world and attracting the most prominent Italian and international designers.

The **specialist districts** represent real "knowledge economies," in which the lead company deals with the end market and coordinates the supply chain sequentially, in line with a "small widespread business" model that produces added value within the area.

SUSTAINABILITY AT THE CENTRE

In 2021, with a view to accompanying the design companies and the entire wood and furnishing chain on the path to ecological transition, the Federation summarised the actions to be taken in a **Decalogue** sponsored by the Ministry of the Environment and Energy Security.

Ten points that chart the **road map of the sector**, to turn environmental challenges into opportunities for growth.

A guide based on principles that represent sustainability according to Federlegno-Arredo and its members.

A real **Constitutional Charter** designed to inspire and indicate the right direction in which to proceed, together.



The Federations have a central role to play in supporting all the actors, especially smaller companies, towards a fully sustainable and circular model. Our aspiration is to create useful tools so that our supply chain becomes a pioneer in the green industry. We are aware that our choices are reflected throughout the entire product value chain. In the face of the challenges ahead of us, it is essential to support our members, to network them and make them go far.

Claudio Feltrin, President, FederlegnoArredo





FLA PLUS: A PROJECT HUB

FederlegnoArredo's strategic vision is crystalised in **FLA Plus**, a pathway for tackling challenges with concrete tools.

The FLA PLUS digital **platform** consists of a **public** area and a **members-only** area, with **services tailor-made** to respond to the specific demands of the sector, including digitised data, a certification portal, a sustainable materials library, circularity tools, a customs counter, intellectual property protection and training courses.

The platform takes the form of a virtual space in which **vertical and highly specialised** information can be found, with a comprehensive dashboard of services in support of everyday activities available for consultation.

"Plus" because this is a **system-wide operation**, which involves FederlegnoArredo, its members and strategic partners in a process that speaks in the plural.

www.fla-plus.it

THE PRIMACY OF ITALIAN WOOD-FURNISHING

Italy's wood-furnishing industry **leads the European field in circular economy.**

93% of particleboard in Italy is made of recycled wood. Followed by Belgium with 84%, Denmark with 60%, Germany with 59%, and France with 50%.

It produces fewer climate-changing emissions than the other large EU countries: 26 kg of CO2 equivalents per every thousand Euros of production, compared with 43 by Germany, 49 by France, 79 by the UK and over 200 by Spain.

It leads the European field with 605 FSC Chain of Custody certificates for furnishing, making it one of the most virtuous supply chains in terms of sustainability.

Source: Fondazione Symbola





THE CHALLENGE OF ECOLOGICAL TRANSITION

The wood-furnishing companies are committed to sustainability by working on all the environmental and social aspects of production, design and product life-cycle.

RESOURCES

96% of companies use sustainable materials and products to some degree, and one in two companies buys at least some raw materials or semi-finished products that are made from recycled materials.

PLANNING

58.2% adopt business models geared to product circularity and recyclability while 40.8% look to reparability, taking at least one circular criterion into account.

PROCESSES

70% of companies have invested in efficiency over the last 3 years in a bid to cut environmental impact. More than half of the companies recover production waste.

ENERGY

59% of companies rely to some extent on renewable energy sources for their production and 27% do so for more than half of their consumption.

SUPPLIERS

47.5% of furnishing companies rely to some extent on locally-sourced raw materials or semi-finished products. 76% keep environmental aspects in mind when choosing their suppliers.

Source: Survey 2023 *La Filiera Legno-Arredo è Ancora Più Green* [The Wood-Furnishing Supply Chain goes Even Greener], Fondazione Symbola and FederlegnoArredo Study Centre

MEMBERSHIP OF THE GLOBAL COMPACT

The Global Compact is a United Nations programme geared to steering and supporting the global business community in promoting sustainability principles through responsible business practices. In 2022, FederlegnoArredo committed to the ambitious plan to join the Global Compact, striving for a sustainable future.

FederlegnoArredo is the **first Federation to be admitted to the programme** within the sector, testament to the originality of the path undertaken and the strong coherence between the wood-furnishing **Decalogue** and the **ten principles of the Global Compact**, in the matter of human rights, labour, environment and the fight against corruption and gender inequality.

Not many industry associations subscribe to the Global Pact, committing themselves to adhering to the 10 principles, pursuing the 17 sustainable development goals set out in the **2030 Agenda**, and to documenting the results of their endeavours.





EUROPEAN PROJECTS

FederlegnoArredo's commitment in the field of European projects continues over time. Projects capable of contributing to the evolution of the sector include:

ECOREFIBRE

Ecological Solutions for Recovery of Secondary Materials from Post-Consumer Fibreboards. Launched in 2022, this four-year project is geared to developing and underpinning new technologies and methodologies for recycling post-consumer MDF panels.

<https://ecorefibre.eu>

WOODCIRCLE

Aimed at young students and workers between the ages of 18 and 35 interested in working in the wood-furnishing sector, the idea is to develop an online training course geared to Twin Transition (digitisation and sustainability/circularity), in a bid to respond to the challenges posed by the dual transition facing the sector.

<https://www.woodcircle.net/it>

C-FARMS

This project, which drew to a close in August 2023, was helmed by FederlegnoArredo, in collaboration with seven Italian partners. Farming practices were identified that would help maximise carbon storage and cut CO2 emissions, underscoring the positive contribution of poplar areas to the fight against climate change.

<https://c-farms.eu/it>

ITALIAN FOREST WOOD CLUSTER

FederlegnoArredo is one of the founding partners of **Italian Forest Wood Cluster**, launched in July 2023 as a result of the protocol signed at the Ministry of Agriculture, Food Sovereignty and Forestry, geared to promoting and supporting initiatives between the forestry world and the world of first and second wood processing, with a view to bolstering ties between companies, the regional institutions and research bodies.

The Cluster's key tasks include valorising Italy's national timber products, based on the principles of **quality, sustainability and traceability certification**.

There is a particular focus on sector-related research and innovation carried out by Italian universities and research centres, to **ensure that every innovation finds the right channel for accessing the economic supply chains** and, vice versa, to be able to build targeted projects with the manufacturing sectors consistent with the great challenges the forestry world is currently tackling and will have to tackle in the coming years.





INSTITUTIONAL MEMBERSHIPS

The Federation belongs to associations, foundations and research bodies, both at national and European level, and sits on a great many round tables.

EUROPE

- **ATIBT** International Tropical Timber Technical Association
- **CEI-BOIS** The European Confederation of Woodworking Industries
- **EDW** European Drinking Water
- **EFIC** European Furniture Industries Confederation
- **EPF** European Panel Federation
- **ES-SO** European Solar Shading Organisation
- **ETTF** European Timber Trade Federation
- **FEFPEB** Fédération Européenne des Fabricants de Palettes et Emballages en Bois
- **FEMB** European Federation of Office Furniture
- **FEP** European Parquet Federation
- **GROW** International European organisation of lightwood packaging manufacturers
- **Lighting Europe**
- **Propopulus** The European Poplar Initiative
- **UNIEP** Union International des Entrepreneurs des peinture

ITALY

- **MAECI**, Italian Design Day
- **MAECI** and **ICE**, Control Rooms for Internationalisation
- **MASAF**, Wood Supply Chain Table
- **ONP**, National Poplar Observatory
- **Catas Spa**
- **Cosmob Spa**
- **Cluster Nazionale Italia Foresta Legno**
- **Fondazione ITS Rosario Messina**
- **INDICAM**, Istituto di Centromarca per la lotta alla contraffazione (IP protection and anti-counterfeiting agency)
- **American Chamber of Commerce in Italy**
- **Italy China Council Foundation**



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SUSTAINABILITY AT THE CENTRE
Find out more about
FederlegnoArredo's activities