

ITALY

OVERVIEW

Size of Market: Based on 1990 data, the estimated total domestic consumption of office furniture amounted to C\$ 1 billion. However, since 1991, office furniture sales have slumped, and the outlook for the office furniture industry is not expected to improve before 1994 or 1995. The slow development of the European economy and the decline in investments in office buildings has restricted, and will continue to restrict growth in the office furniture industry. However, there will continue to be demands for office furniture in the long run, as the office automation sector focuses on the office work station, and the service sector continues to grow.

SOURCES OF SUPPLY

In 1990 the office furniture sector registered an increase in production of 9.5%. Imports represented only 4% of domestic consumption, at C\$ 44 million. Within this import market, Germany supplied an estimated 40% of Italy's imported office furniture.

The export market dominated Italy's office furniture sector, amounting to \$C 450 million. Furniture and panels represented approximately 60% of the exports, at C\$ 277 million, and seating represented the remaining 40%, at C\$ 173 million. Italian office furniture is exported to France (25.3%), Germany (11.7%), Britain (10%), Belgium/Netherlands (9.5%), and Switzerland (5.6%).

BUSINESS ENVIRONMENT

Office furniture manufacturers operate internationally within the EC-markets, and European standardization will influence the Italian office furniture manufacturers. The M9 manual, which is published by the UNI (the Italian national standards body) remains in effect since its last publication of 1989. A useful working picture of the standards for this sector can be found in "Prescrizioni tecniche per le forniture di mobili in legno, mobili e scagglature in metallo, pareti e pannelli divisorii", which is published by Provveditorato Generale dello Stato.

The major clients for office furniture are the small and medium-sized companies (40-45%), followed by large industries (15-20%), banks and insurance companies (20%), and public administration (20%).

PROMOTIONAL ACTIVITIES

Canadian exporters should attend the following trade fairs, as they are visited by Italian buyers:

- EIMU - a biennial event featuring office furniture, held in Milan. The last fair was held in September 1993. Interested parties should contact COSMIT, Corso Magenta 96, 20123 MILANO Tel: 02-48008716 Fax: 02-4813580, for more information.