



The Homewares and Furnishings Industry in Catalonia

March 2019

Sector Snapshot

The Homewares and Furnishings Industry in Catalonia: Sector Snapshot

ACCIÓ

Government of Catalonia



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ACCIÓ's Strategy and Competitive Intelligence Unit

Barcelona, March 2019

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1. The Homewares and Furnishings Industry



Definition of the Homewares and Furnishings Industry (I)

The “homewares and furnishings industry” refers to **all companies that offer products and services designed to fit out both residential and collective living environments**. The segments that fall under the “homewares and furnishings” category differ depending on the source, but the common denominator is the design and subsequent specification of the structure. This study focuses on companies that manufacture furniture, lighting, home textiles, taps and sanitary ware, and floor and wall coverings, **for both residential and collective use, and through both retail and contract channels**.

Living environments are human-made spaces where people live, spend the night, eat, work, study, enjoy culture and entertainment, make purchases, etc.

Source: Own data from EIC (DGI - ACCIÓ).

Definition of the Homewares and Furnishings Industry: Segments Included (II)

Residential
use



Home
textiles

Taps and
sanitary
ware

Floor and wall
coverings

Collective
use

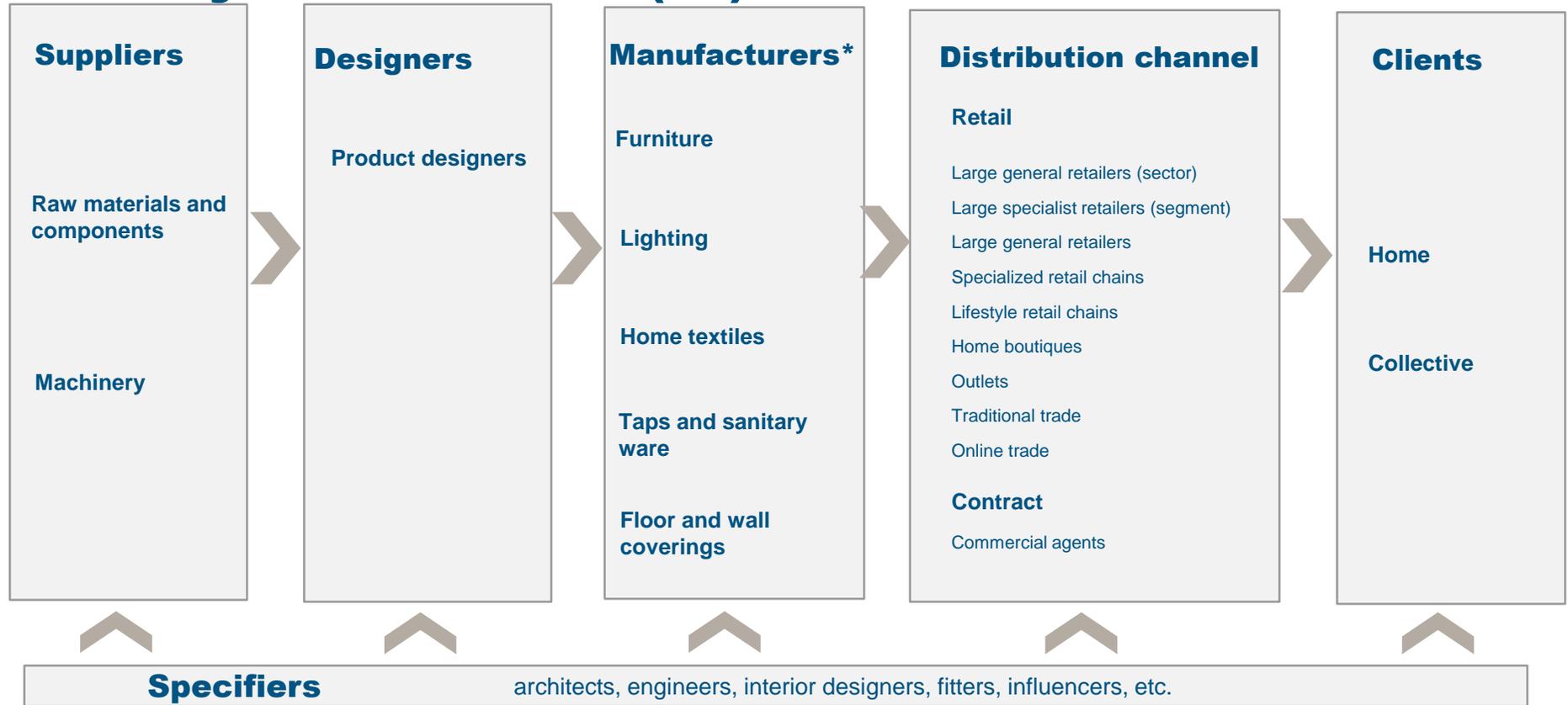


Lighting

Furniture

Source: Own data from EIC (DGI - ACCIÓ).

Definition of the Homewares and Furnishings Industry: Value Chain (III)



*In the case of Catalonia, these segments have been selected.

Source: Own data from EIC (DGI - ACCIÓ).

The Global Homewares and Furnishings Industry: Turnover (I)

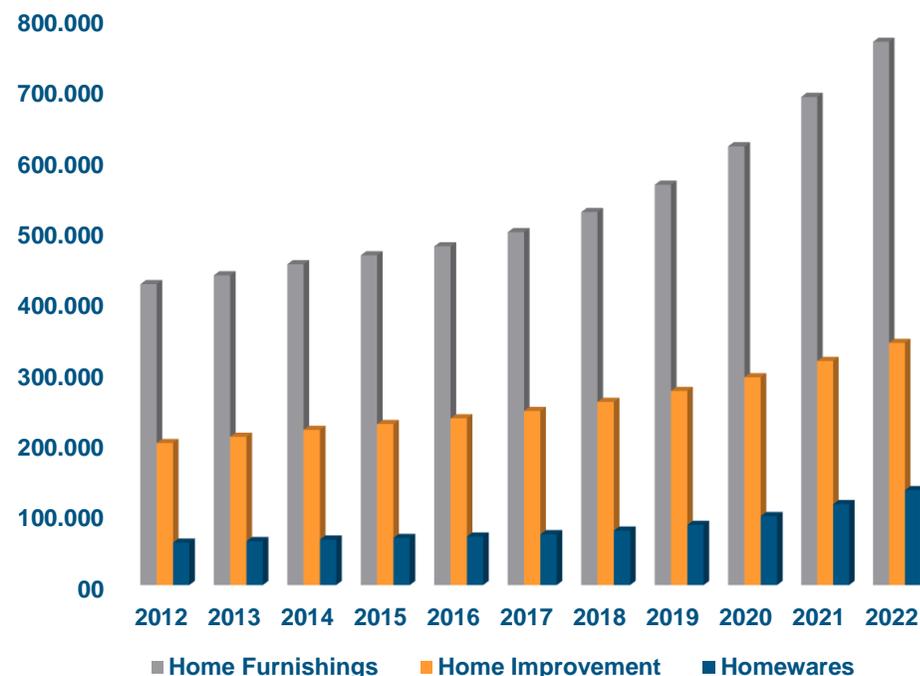
In 2017, the homewares and furnishings industry achieved a global turnover of €815 billion, a figure that is expected to increase to €1 trillion by 2020.

The home furnishings segment was especially noteworthy for its turnover of almost €500 billion in 2017.

With respect to growth, the homewares segment is expected to achieve very high growth and double its value between 2015 and 2022.

In this case, the homewares and furnishings industry encompasses the categories of home furnishings (furniture, lighting and other home decor products), home improvement (products designed for improvements and reforms, such as floor and wall coverings) and homewares (tableware and small items for the home).

Evolution of the global turnover of the homewares and furnishings industry, by segment



Source: EIC (DGI - ACCIÓ), based on data from Euromonitor.

The Global Homewares and Furnishings Industry: Imports and Exports (II)

The volume of imports in the homewares and furnishings industry in 2017 was **\$17.5 trillion**.

The **United States, China and Germany** were the main **exporting and importing countries** in the global homewares and furnishings industry in 2017.

Of the 10 main importing countries in 2017, **five were European** (Germany, France, United Kingdom, Netherlands and Italy) and **four were Asian** (China, Japan, Hong Kong and South Korea). This same pattern can be seen among the 10 main exporters.

Ninety-six percent of the countries are expected to see an **increase in imports** between 2017 and 2019. This applies particularly to Asian countries such as China, India and South Korea, which are set to experience growth of around 20%.

Main importing countries in 2017



United States



China



Germany

Main exporting countries in 2017



China



United States



Germany

Countries with significant import growth (2017-2019)



China



India



South Korea

Source: EIC (DGI - ACCIÓ), based on data from Euromonitor.

The Global Homewares and Furnishings Industry: A Closer Look at the Furniture Segment (III)

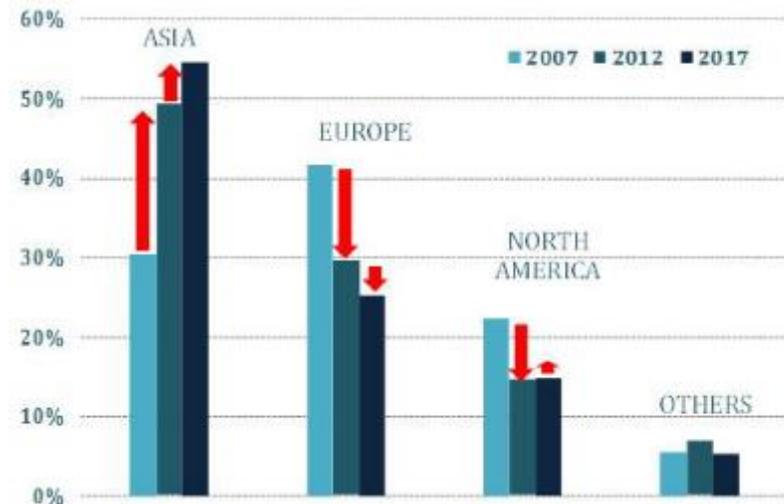
The main subsector in the homewares and furnishings industry is furniture, whose total turnover in 2017 was **\$400 billion** and which saw a **3% increase with respect to the previous year**. In fact, this subsector has grown cumulatively by 25% in the last decade.

Asia has replaced Europe as the world's leading furniture producer. This growth is due largely to China, which accounts for 70% of Asian production.

Evolution of global turnover in the furniture segment and its growth



Evolution of global turnover in the furniture segment by geographic area



Source: EIC (DGI - ACCIÓ), based on data from CSIL.

2. The Homewares and Furnishings Industry in Catalonia



Main Mapping Conclusions (I)

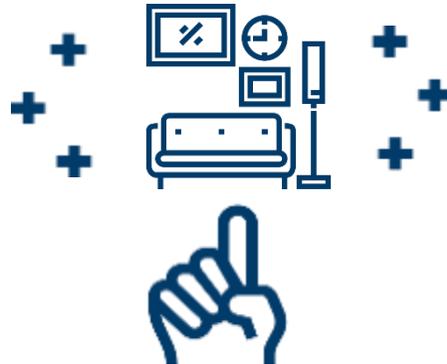
The Homewares and Furnishings Industry in Catalonia

1,468 companies

Total turnover linked to the sector in Catalonia is €5 billion

47,584 employees

- Distribution of the sector's turnover, according to segment:
1. Taps and sanitary ware (41%)
 2. Furniture (26%)
 3. Floor and wall coverings (23%)
 4. Lighting (8%)
 5. Home textiles (2%)



The homewares and furnishings industry accounts for 2.13% of Catalan GDP

99.52% of companies are SMEs

75.68% of companies have a turnover of less than €1 million

A moderately internationalized sector:
 2.86% of companies have an affiliate company abroad
 25.88% of companies are exporters

Source: Authors' own data based on Orbis, ACCIÓ directories and the Barcelona and Catalonia Start-up Hub. For data on the turnover and employees of companies that do not belong 100% to the sector due to issues relating to presence in Catalonia and engagement in multiple activities, estimates have been made based on the companies' business lines. Data relating to the last year available (2017).

Main Mapping Conclusions: Segments (II)

Catalonia's homewares and furnishings industry accounts for 1,486 companies, which together generate revenues of €5 billion and employ a total of 47,584 workers.

1,468
COMPANIES

€5 BN
TURNOVER

47,584
JOBS

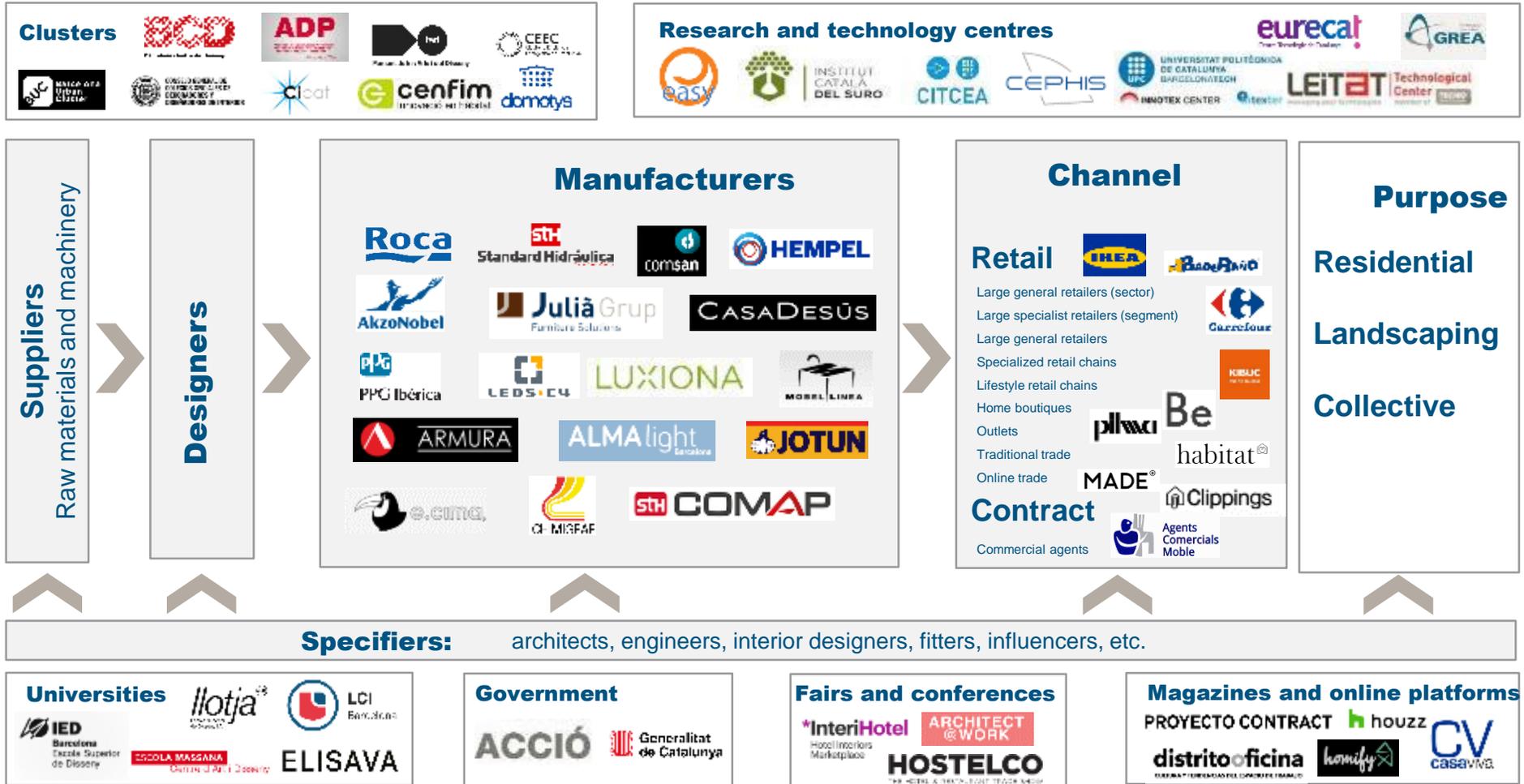
Mapping and quantification of Catalan companies in the homewares and furnishings industry, according to segment

Segments	No. of companies	Turnover of the segment	No. of employees	Main companies		
Taps and sanitary ware	43	€2.05 bn	23,566			
Furniture	1,049	€1.32 bn	15,739			
Floor and wall coverings	198	€1.13 bn	5,476			
Lighting	160	€403 M	2,418			
Home textiles	18	€92 M	385			
TOTAL	1,468	€5 bn	47,584			

Source: Authors' own data based on Orbis, ACCIÓ directories and the Barcelona and Catalonia Start-up Hub. For data on the turnover and employees of companies that do not belong 100% to the sector due to issues relating to presence in Catalonia and engagement in multiple activities, estimates have been made based on the companies' business lines. Data relating to the last year available (mainly 2017, and in some cases 2016).

The Homewares and Furnishings Industry Ecosystem in Catalonia

Partial list*



Note: These brands are used for information purposes only. The brands mentioned in this report belong to their respective owners. None of them is owned by ACCIÓ. This is a diagram of most of the main companies that form part of the homewares and furnishings industry ecosystem in Catalonia; there may be other companies in the sector that were not included in the study.

Foreign Trade and Attracting Foreign Direct Investment (I)

Foreign Trade

BALANCE OF TRADE (2017)



The Catalan homewares and furnishings industry has a negative trade balance of **€96.89 million**.



The balance of trade in the homewares and furnishings industry in Catalonia has maintained a **negative coverage rate over the past four years**.

FOREIGN TRADE EVOLUTION



Exports grew by **5.9%** between 2016 and 2017.



Imports increased by **5.4%** in 2017, a similar growth rate to that of exports.

MAIN TRADE PARTNERS (2017)



France, Portugal and Italy with respect to exports.



China, Germany and Italy with respect to imports.

Source: Own data from EIC (DGI - ACCIÓ), based on 2017 data from Datacomex. (2017 data are provisional).

Foreign Trade and Attracting Foreign Direct Investment (II)

Some FDI projects in Catalonia

Attracting FDI

From 2013 to 2017...

IN THE CATALAN HOMEWARES
AND FURNISHINGS INDUSTRY...



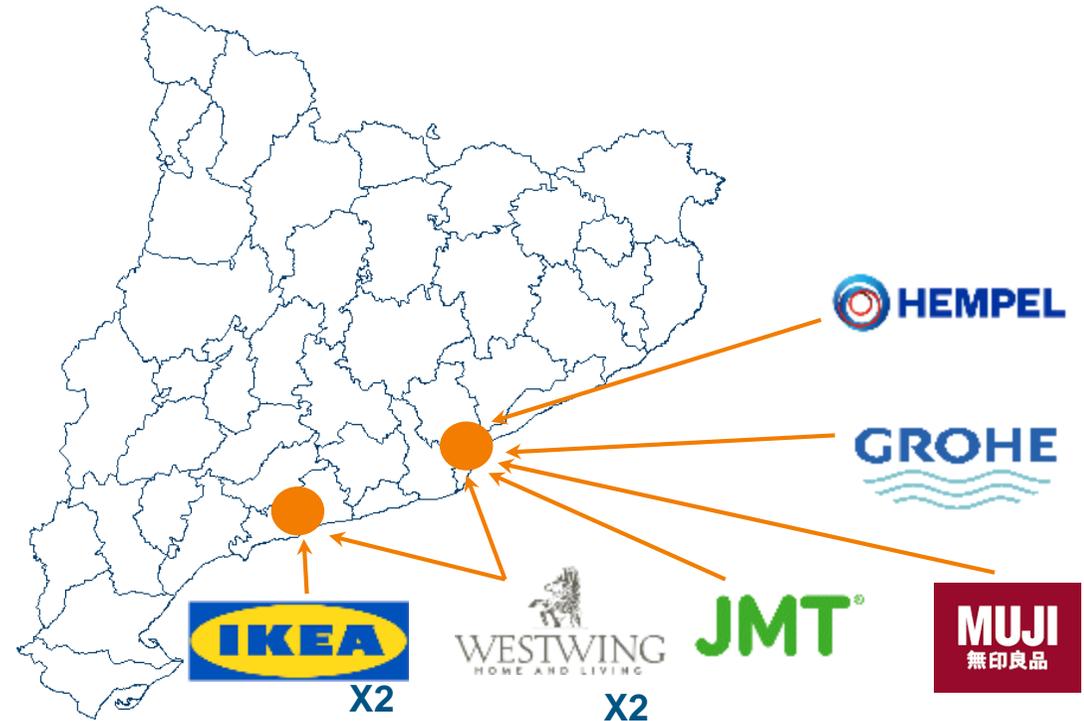
13 FDI projects



€111.4 M in capital investment



677 jobs created



Source: Compiled by EIC (DGI - ACCIÓ), based on fDi Markets, 2013-2017.

KRISKADECOR Business Case

Excellence in Design

- A Catalan family-owned company located in Montblanc (Tarragona) that has been dedicated to designing dividers, wall coverings and ceilings and other interior design and customized decor projects, using aluminium and other metal chain links, for more than 90 years. The company also operates in the United States.
- This company is noted for its constant product innovations (materials and finishes under continuous study) and its business performance over the years. It has always adapted to the needs of the market, sought out opportunities and created trends.



Source: EIC, (DGI - ACCIÓ), based on data from www.kriskadecor.com.

ESTILUZ Business Case

A Firm Commitment to International Business

- A Catalan lighting company based in Girona that has been dedicated to the design, development, manufacture and distribution of high-quality decorative lighting products since it was founded.
- The company's growth strategy has involved a firm commitment to international expansion, and it currently has subsidiaries in Paris (1991), New York (1993) and Frankfurt (2002).
- Estiluz still carries out the industrialization, manufacturing and assembly processes at its own facilities. It has based its strategy on product differentiation and impeccable service from the very beginning.

estiluz®



Source: EIC (DGI - ACCIÓ), based on data from www.estiluz.com.

RIPLEG 30m2 Business Case

New Business Opportunities



A family-owned company based in Ripoll, Girona, with more than 30 years' experience in the metal industry. It offers a comprehensive service (engineering, cutting and electromechanical assembly).

The company's experience has allowed it to launch a new business line, which involves the design, manufacture and installation of built-in metal products for collective-use buildings such as hotels, clinics and hostels. This project is enjoying great success in the market.



Source: EIC (DGI - ACCIÓ), based on data from www.ripleg.com.

NANIMARQUINA Business Case

Global Thinking

- A Barcelona-based Catalan company founded in 1987 with the aim of designing unique and surprising handcrafted rugs. In light of the strong market response, the company rapidly embarked on the adventure of outsourcing production to countries that offer cultural value and endless possibilities with respect to craftsmanship.
- The company is noted for its constant pursuit of innovation, craft techniques and new materials and for its business spirit, which drives it to work in a global market and with local and international designers to guarantee a wide range of themes and to experiment with different textures, materials and forms.
- All of this results in rugs tailored to the unique needs of each and every one of its customers.

nanimarquina



Source: EIC (DGI - ACCIÓ), based on data from www.nanimarquina.com.

IKEA and LEROY MERLIN Business Case

New Business Models: Urban Concept

- Getting to IKEA and LEROY MERLIN stores is not always a straightforward task because of their location. This has led the companies to base their commercial strategy for this year around possible launches in city centres.
- On 10 July 2018, IKEA opened its first pilot city-centre store in Madrid, which will serve as a reference to define its strategy in Barcelona.
- Leroy Merlin has embraced this same initiative, and opened its first urban store in Barcelona on 30 November 2018. These two multinationals, which are leaders in their industry, are seeking to break down this commercial barrier and make their stores accessible to more customers.

elPeriódico EDICIÓN CATALUÑA EDICIÓN GLOBAL INICIAR SESIÓN

ECONOMÍA ACTUALIDAD MÓVIL ZONA FRANCA FISCALIDAD MOTOR VIVIENDA EMPRENDEDORES INNOVACIÓN VALOR TECNOLOGÍA

BALANCE ANUAL

Ikea abrirá próximamente una tienda en el centro de Barcelona

Las ventas a través de Internet repuntaron el 50% y suponen ya el 5,3% de la facturación

Ikea eleva las ventas en España el 2,1%, hasta 1.487 millones



LERROYMERLIN
Da vida a tus ideas

PRODUCTOS PROMOCIONES SERVICIOS TIENDAS

Urban Barcelona Dirección y horarios Dudas, opinión y con

Tiendas > Urban Barcelona

Urban Barcelona

cambiar tienda

Información general

Source: EIC (DGI - ACCIO), based on data from www.elperiodico.com and www.leroimerlin.es.

HEMPEL Business Case

New Openings

This Danish company, a world leader in paints and coatings for the industrial, marine, container, yacht and decorative markets, has 45 subsidiaries across the world.

Through its international growth and expansion strategy, the company has invested €6 million in a new R&D centre that has opened in Santa Perpètua de Mogoda (Barcelona). The company has received support from ACCIÓ for this project. The new plant, which has a 3,000 m2 laboratory, with testing areas and offices, created 30 jobs and will serve the entire group at international level. The plant has been used to develop new coatings, including fire protection coatings.



Hempel pone en marcha un centro de I+D en Santa Perpètua

Expansión, Barcelona. La empresa danesa Hempel ha realizado una inversión de seis millones de euros en su nuevo centro de I+D en Santa Perpètua de Mogoda (Valles Occidental). Las nuevas instalaciones, inauguradas ayer, han generado treinta empleos.

Hempel es una multinacional especializada en revestimientos para decoración, protección, marítimo, comederos, industria y Yates. El nuevo centro se dedicará a desarrollar productos que maximicen la productividad del negocio.

Las instalaciones cuentan con un laboratorio de 3.000 metros cuadrados, áreas de pruebas y oficinas, y contará con un equipo de técnicos especializados en el ámbito del fuego, químico e ingeniería.

“Estamos decididos a desarrollar la industria de revestimientos dentro de este campo específico a escala global”, afirmó el vicepresidente del grupo, Lars Petersen. “En el nuevo centro de excelencia continuaremos trabajando en la investigación y desarrollo de productos de protección para contra el fuego”, dijo ayer el director de I+D en Barcelona, Santiago Arías.

Hempel ya ofrece sus gamas de productos, pero el equipo está decidido a avanzar en este nicho de negocio. “Trabaja en productos que nuestro cliente necesita, pero que nosotros no ofrecemos”, afirmó.

La implantación de este nuevo centro de excelencia

La compañía ha invertido seis millones de euros en las nuevas instalaciones

Lars Petersen (Hempel), Joan Soler, el alcalde de Santa Perpètua, Joan Alcántara, Angel Chacón, y el alcalde de Santa Perpètua, Joan Alcántara.

El centro tiene una superficie de 3.000 metros cuadrados y ha generado treinta empleos

en I+D de Hempel ha contado con la ayuda y asesoramiento de la agencia catalana Trade & Investment, el área de atención de inversiones extranjeras de Acció, la agencia para la competitividad empresarial del Departamento d'Empresa i Consumidors de la Generalitat de Catalunya.

Durante el acto de inauguración, la conselleria Angel Chacón aseguró que “la inversión de Hempel en esta planta es un ejemplo de colaboración con la estrategia de la Generalitat, una economía productiva, innovadora, sostenible, integrada y abierta al mundo”.

La facturación de la filial española de Hempel ascendió en 2016 -último año con cuentas disponibles- a 60 millones de euros, un 4,3% más que el año anterior. El resultado de explotación bruto fue de 7,2 millones, un 32% más que el año anterior, mientras que el beneficio neto alcanzó los 7 millones de euros (+34,9%).

La multinacional danesa facturó en el global 1.170 millones de euros el año pasado, un 3,2% menos, y llegó en el total del 71 millones (+9%). El resultado ascendió 88 millones de euros. La compañía emplea más de 2.700 trabajadores en 60 países, 28 en el centro de I+D.

Source: EIC (DGI - ACCIÓ), based on data from www.hempel.es.

3. Opportunities in the Homewares and Furnishings Industry



Trends (I): How the Homewares and Furnishings Industry Interacts with Future Macrotrends

The global population is expected to grow by 33% between 2015 and 2050. This growth will result in greater aggregate demand, especially with respect to the homewares and furnishings industry, which will have to adapt to serve a new middle class in developing countries and a higher population density.

Population Growth and Demand



Hyperconnectivity, in the form of IoT, is revolutionizing many traditional products and sectors. The homewares and furnishings industry was the first sector to adapt to this new context through the use of home automation, by connecting light bulbs, furniture and energy sources and thus making it possible to control and customize homes.

Invasion of Technology



The elderly population is expected to increase by more than 130% between 2018 and 2050. This group will need furniture and home solutions that are customized and adapted to their needs, accessible and connected to healthcare services.

The Ageing Population



The current level of resource consumption is forecast to double by 2050. This pace can be curbed only by applying the circular economy and energy savings. The homewares and furnishings industry plays a key role through efficiency generated by new insulation solutions and the use of second-hand furniture.

Resources Under Pressure



Ninety-six percent of marketing experts claim that customization helps improve a company's relationship with its customers. In this regard, inhabitants seek to adapt their surroundings to their preferences and needs, especially with regard to the home, where custom furniture and personal expression play a central role.

Personalization



For the first time in history, more people live in cities than outside of them. The dramatic rise in the urban population is creating many conurbations with limited space. This is leading to the compression of living spaces and creating different, more densely populated living environments.

An Increasingly Urban World



Society has evolved such that personal well-being has become a priority and a key concern that affects both the supply and the demand of products and services. Chronic stress is the hallmark of modern life, and spaces are being redesigned to favour health and well-being.

Personal Well-Being

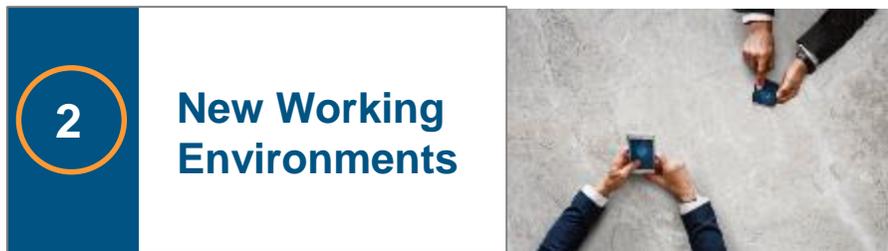


Source: Own data from EIC (DGI - ACCIÓ).

Trends (II)



Changes in lifestyle habits (a rise in teleworking, changes in the concept of leisure, the ageing population, etc.) are affecting the design of spaces, which must be functional and adapted to these needs. Spaces must be flexible so that they are suitable for different types of activity (well-being, leisure, work, etc.).



The world is becoming increasingly global, which is opening up work opportunities. One-off collaborations are now possible, such as partnerships between manufacturers and designers in different locations to create joint projects or specific designs. For example, *Ambra Medda* was a project to launch a restaurant during Milan Design Week that brought American and Norwegian designers together to create furniture. They were able to work together by communicating through Skype.



Consumers are more demanding, which means that they are willing to invest in better quality products. Designs are more forward-thinking and use innovative materials (nanomaterials, bactericidal foams, textured finishes, etc.).

Source: Own data from EIC (DGI - ACCIÓ), based on the study Trends in the Living Space Book 19/20 - Observatory for Trends in the Living Space.

Trends (III)

4

Sustainable Living Space



Consumers are increasingly sensitive and demanding sustainable products to contribute to a better world. Raw materials are being reused, and biodegradable materials (plastics recovered from the sea, dust and even hair) are being used to design new product lines.

5

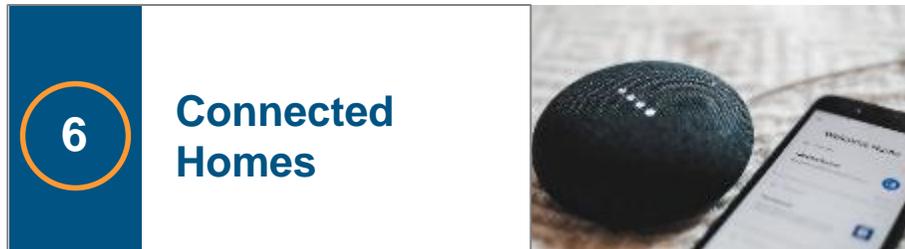
Custom-Made Living Space



Consumers are demanding personalized and participatory products that allow users to become creators through technological advances. Consumers are even willing to pay more if the product offers value that can't be found anywhere else.

Source: Own data from EIC (DGI - ACCIÓ), based on the study Trends in the Living Space Book 19/20 - Observatory for Trends in the Living Space.

Trends (IV)



Consumers have in-depth knowledge of new technologies and are demanding greater interconnectivity anywhere and at any time. There is increasing demand for the concept of the remote home, where users can control functions such as air conditioning and security even when they are elsewhere.



Society is currently immersed in a fast, increasingly connected lifestyle. Teleworking and more nomadic lifestyles are on the rise. All this has led to a greater need for well-being and comfort. People are seeking solutions that allow them to improve their lifestyle, both physically and emotionally, and spaces that enhance social relationships. Well-being and the pursuit of healthier lifestyles are shaping interior design when it comes to planning spaces.

Source: Own data from EIC (DGI - ACCIÓ), based on the study Trends in the Living Space Book 19/20 - Observatory for Trends in the Living Space.

Opportunities for Innovation and Interaction with Technologies of the Future (I)

Robotics



The use of robots and machinery capable of performing repetitive tasks that require high precision, tasks that could be dangerous for human beings and tasks that are impossible to perform without the use of a machine. They help increase companies' productivity and profitability.

ABB – Wood Industry
Automation of production processes in the furniture and wood industries, including material handling, application of paint and varnish, and the production of wood pulp.

3D Printing



3D printing for any purpose: prototypes, samples, products, dies, moulds, etc. Furniture finishes are achieved through techniques and styles such as 3D cutting and modelling. It can also be used to customize products.

NASA
NASA challenged different designers to create 3D-printed models of the first homes on Mars, designed for living and working.

Artificial Intelligence



AI can be used to create products tailored to consumers' preferences and emotional reactions. Some programs ask customers questions and use the answers to identify their tastes and needs, thus making it possible to customize products. It could even be used to design homes.

Kendo
In 2013, Kendo was involved in an R&D&I project led by AIDIMA (Technology Institute on Furniture, Wood, Packaging and Related Industries), Valencia, in which sensors were added to furniture to monitor lifestyle habits in private homes and find out how people use furniture.

Cybersecurity

Order delivery management require stores to adapt to their customers' habits. Also, the use of technologies for security and protection in the home.

ICA, a Swedish supermarket that delivers shopping to the customer's refrigerator. The company works with Glue, a smart locksmith company that shares codes that allow homes to be entered permanently or temporarily.

Source: Own data from EIC (DGI - ACCIÓ), based on the study Habitat 4.0. Feasibility Analysis for the Implementation of Industry 4.0.

Opportunities for Innovation and Interaction with Technologies of the Future (II)

Connectivity 5G



5G will make connectivity more secure and stable, a requirement for operating with devices. It will also lead to the widespread use of the Internet of things (IoT) and smart cities.

Vodafone
One of the world's leading 5G telecommunications operators.

Augmented Reality / Virtual Reality



The use of AR for learning, operational and commercial purposes (customer relationships, marketing, etc.).

Kibuc
Distributors of kitchen and bathroom furniture and electrical appliances. Their website features tools for planning 3D spaces.

Neuroscience



Its goal is to understand how the living environment, where humans carry out daily activities, affects individuals' physical and mental health, mood and behaviour.

Louis Kahn's **Salk Institute for Biological Studies** (1966) - San Diego (California). This building promotes the best intellectual and physical comfort conditions based on how the human brain works.

The Internet of Things

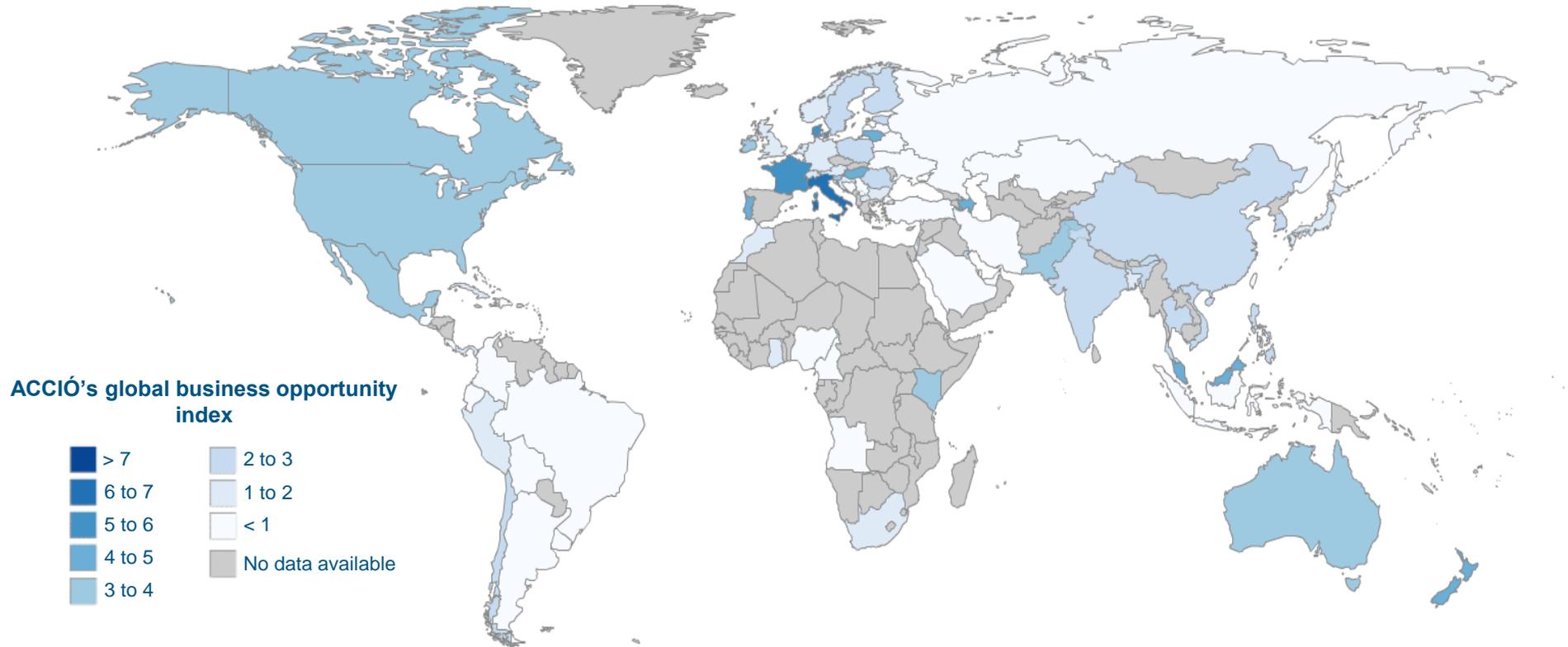


Connectivity and mobility to develop operational activities in any area: design, production, distribution, sales, etc.

Herman Miller
This company offers a range of connected office furniture. The furniture gathers data on the use of desks with the aim of improving performance in the workplace.

Internationalization Opportunities (I)

ACCIÓ's global business opportunity index in the homewares and furnishings industry



Note: The index uses values between 1 and 10.

Source: Global trade mapping, 2018 by EIC (DGI – ACCIÓ).

Internationalization Opportunities (II)

Italy

Furniture and Design in Italy



Italy is a global leader in furniture design and production. In addition to having a very strong domestic market, it represents a benchmark for the sector at international level. The typical Italian consumer is extremely demanding in terms of quality and innovation. Domestic demand increased in 2016 and 2017, and a rise in imports is also expected. In spite of the competition, Catalan companies need to operate in the Italian market if they want to consolidate their international profile. The country organizes the world's largest trade fair in the sector, the Milan Furniture Fair, which showcases the latest trends. This could be an opportunity for companies with a strong design and/or innovation component.

Index:
6.34

Notable for:



France

Adaptation of Housing for the Elderly



The priority of the French government is to keep elderly people in their own homes. To achieve this, it has developed a national plan to adapt 80,000 homes, which is funded through an assistance scheme. Elderly people whose homes are adapted are entitled to a 25% tax deduction on the investment (equipment + installation). The maximum deduction available is €5,000 (€10,000 for a couple) in five years and includes sanitary facilities (toilets, adjustable-height toilets, baths with door, etc.) and security and accessibility equipment (slip-resistant coatings, remote control systems for electrical installations, etc.). Small homeowners can benefit from a subsidy of 35% to 50% of the cost of works, up to a maximum of €20,000.

Index:
5.71

Notable for:



Denmark

World Leaders in Furniture Design



The Danish sector places design and innovation at the top of its furniture production agenda. The design sector is highly developed and represents a global benchmark. The presence of major product design schools and clusters has generated the perfect ecosystem for innovative furniture design. It is a multicultural market that is open to new trends and offers numerous opportunities with respect to new furniture products that offer added value in terms of design and functionality. Moreover, the sector is firmly committed to sustainable development, which leads it to seek out new materials and prioritize technological innovation.

Index:
5.20

Notable for:



Source: Global trade mapping, 2018 by EIC (DGI – ACCIÓ).

Internationalization Opportunities (III)

Malaysia

New Trends Towards Sustainability and Design



Malaysia's homewares and furnishings industry is highly developed and continues to grow through innovation. It represents a reference at global level. The sector has always been characterized by the use of wood as the main material, although it has recently moved towards researching new materials and processes. The Malaysian government is committed to strengthening the sector in collaboration with the private sector, thus ensuring its sustained and continued growth. This commitment is giving rise to new trends, such as the use of more sustainable processes, diverse, recyclable materials and innovative design. There is a strong demand from different profiles; both buyers whose priority is usefulness criteria and those seeking added value in terms of aesthetics.

Index:
4.92

Notable for:



Portugal

The Contract as a Driving Force for the Homewares and Furnishings Industry



Portugal is traditionally one of the main European destinations for Spanish furniture exports. According to data from AIDIMME (Technology Institute on Metal Processing, Furniture, Wood, Packaging and Related Industries), sales of Spanish furniture to foreign countries increased by 8.47% in 2016. This rise in exports has been driven by the contract sector: hotels, businesses, offices, institutions, etc. This sector offers opportunities for Catalan companies. Foreign buyers value, above all, the quality, price and design of the products.

Index:
4.57

Notable for:



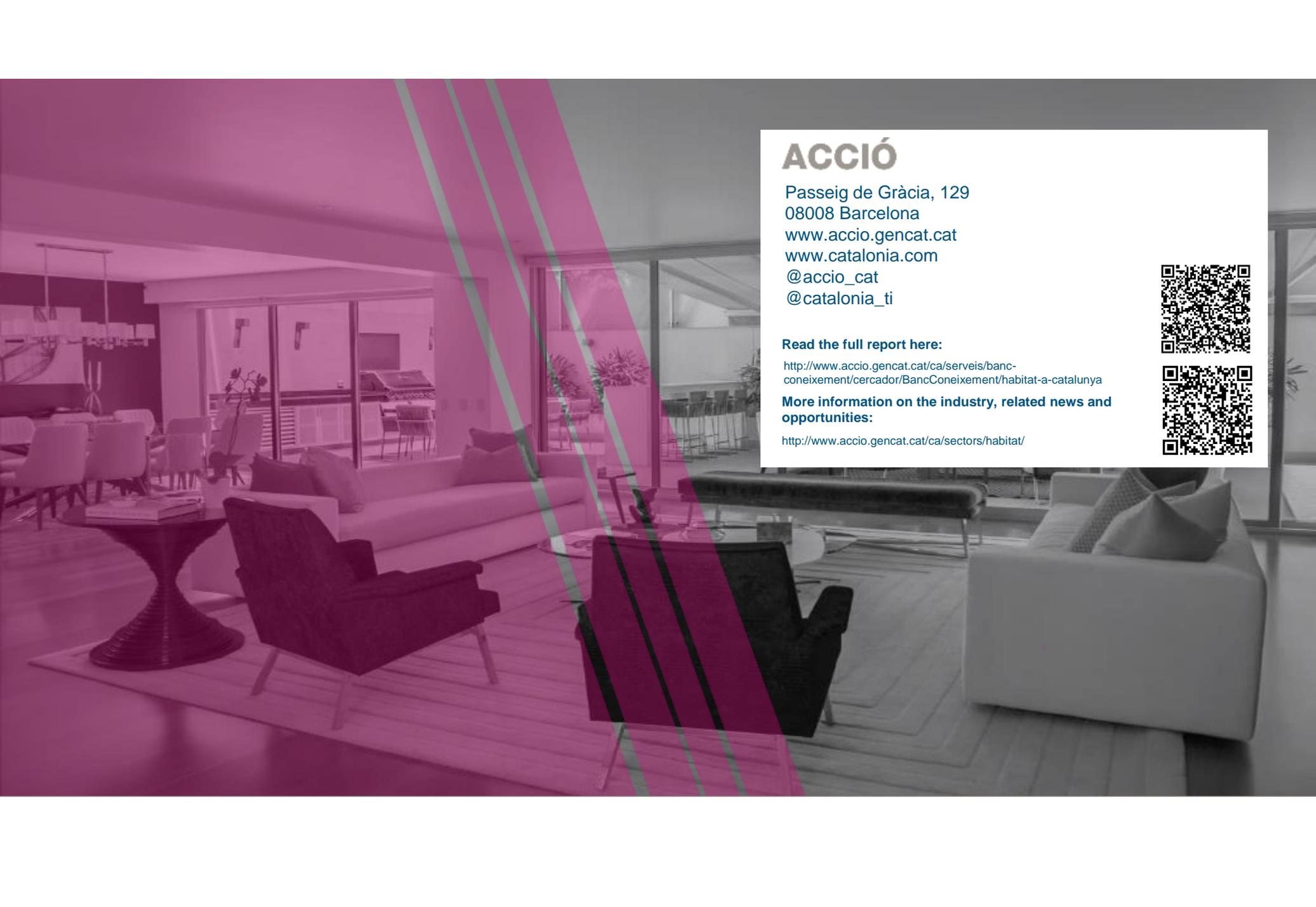
Note: Countries are arranged according to ACCIÓ's global business opportunity index. The index uses values between 1 and 10.

 *Innovation opportunities*
 *Internationalization opportunities*

Macroindicators in ACCIÓ's global business opportunity index:

-  Doing business
-  Market size
-  Prioritization of ACCIÓ markets
-  Sector in the country

Source: Global trade mapping, 2018 by EIC (DGI – ACCIÓ).



ACCIÓ

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More information on the industry, related news and opportunities:

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