European Furniture Industries Confederation

EFIC CONFERENCE

THE FURNITURE DAY 2022

19 MAY 2022

09:15-15:30 CET

A hybrid event to create a cross value chain discussion about the furniture industry, its future competitiveness and positive societal impact, with a focus on sustainability and digitalisation.

EVENT SPONSORED BY blum SWISS KRONO GROUP

EFIC
European Furniture Industries Confederation

Morning session: Key trends affecting the European furniture sector, with a focus on the coronavirus pandemic, sustainability and digitalisation

10:00 – 10:05

1. Welcome

Mariam Zaidi

Moderator

EFIC
European Furniture Industries Confederation

Morning session: Key trends affecting the European furniture sector, with a focus on the coronavirus pandemic, sustainability and digitalisation

10:05 – 10:15

2. Opening remarks

Edi Snaidero

EFIC President

EFIC
European Furniture Industries Confederation

Morning session: Key trends affecting the European furniture sector, with a focus on the coronavirus pandemic, sustainability and digitalisation

10:15 – 10:45

3. Keynote speech: Current and future megatrends in the furniture industry: A focus on the coronavirus pandemic, sustainability and digitalisation

Prof. Dr. Sascha Peters

Haute Innovation

EFIC
European Furniture Industries Confederation

Megatrends in the furniture industry

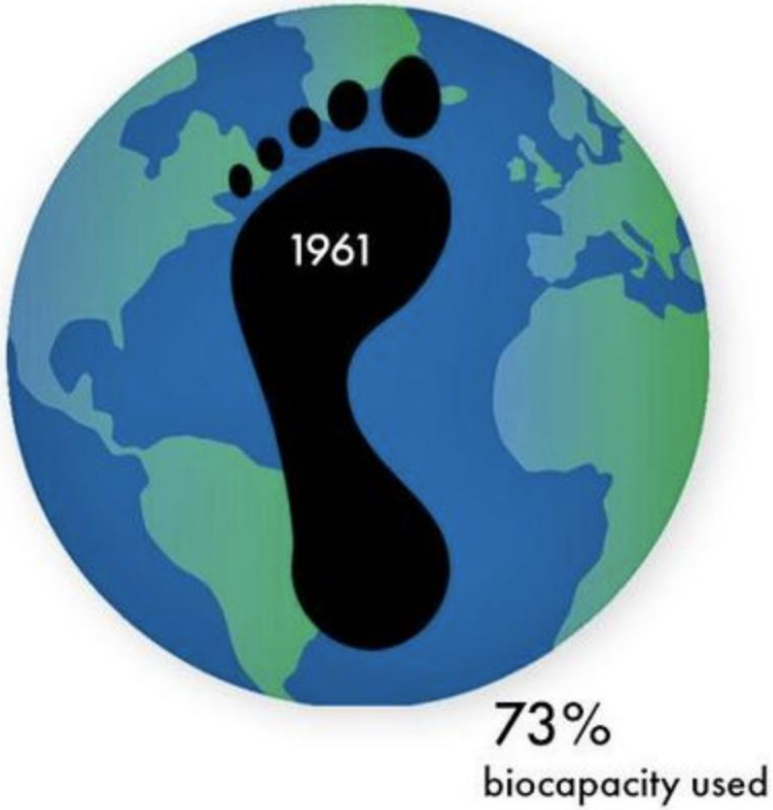
A focus on the pandemic, sustainability and digitalisation

Hon. Prof. Dr. Sascha Peters
HAUTE INNOVATION – Zukunftsagentur für Material und Technologie, Berlin


STOP
Klimakrise
STOP
GroKo
IR HABEN
WE WANT
Greta

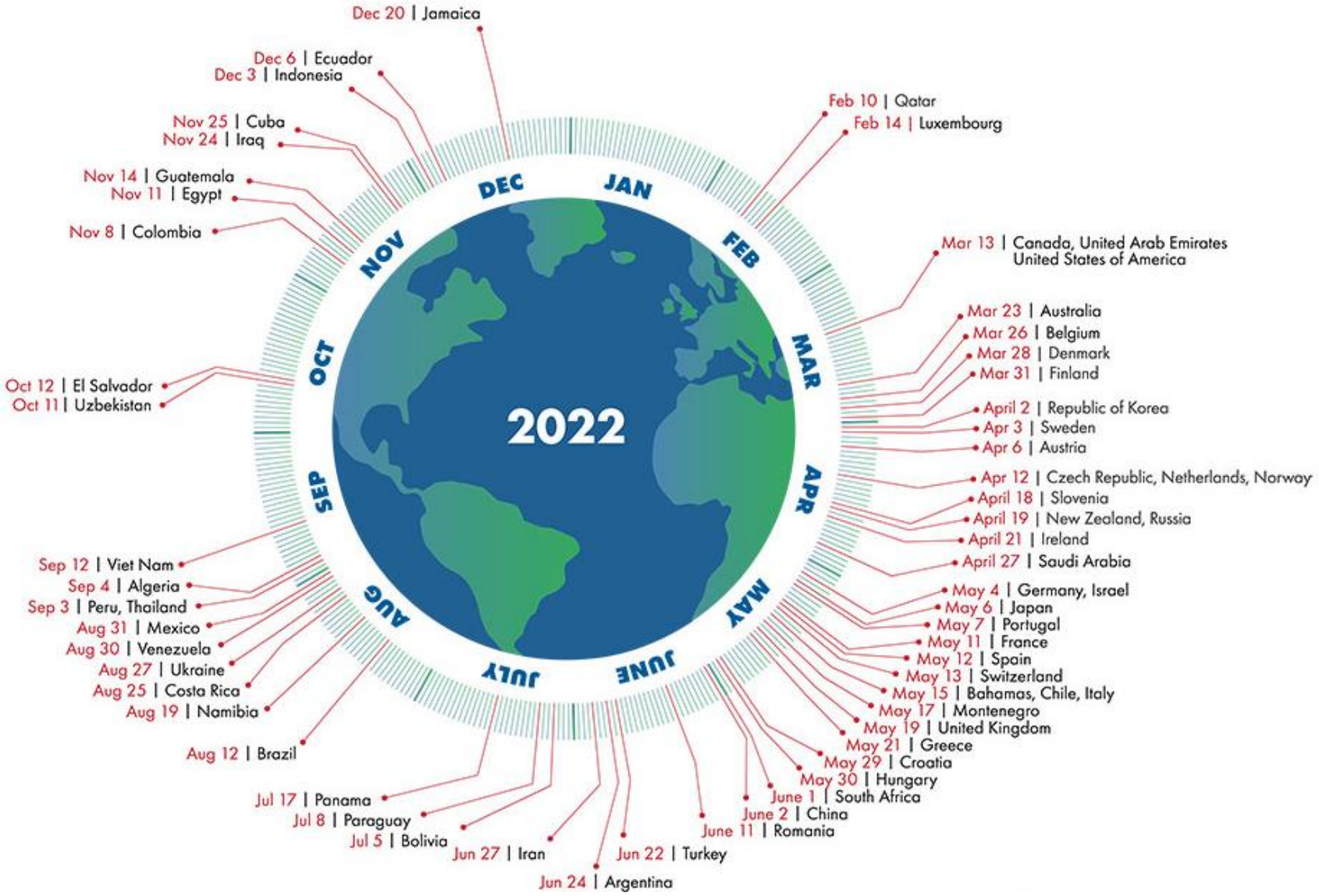
Overstepping Ourselves

Global Footprint Network



Ecological Footprint

Earth Overshoot Day: 29th of July 2021 ... since then, we live on credit!



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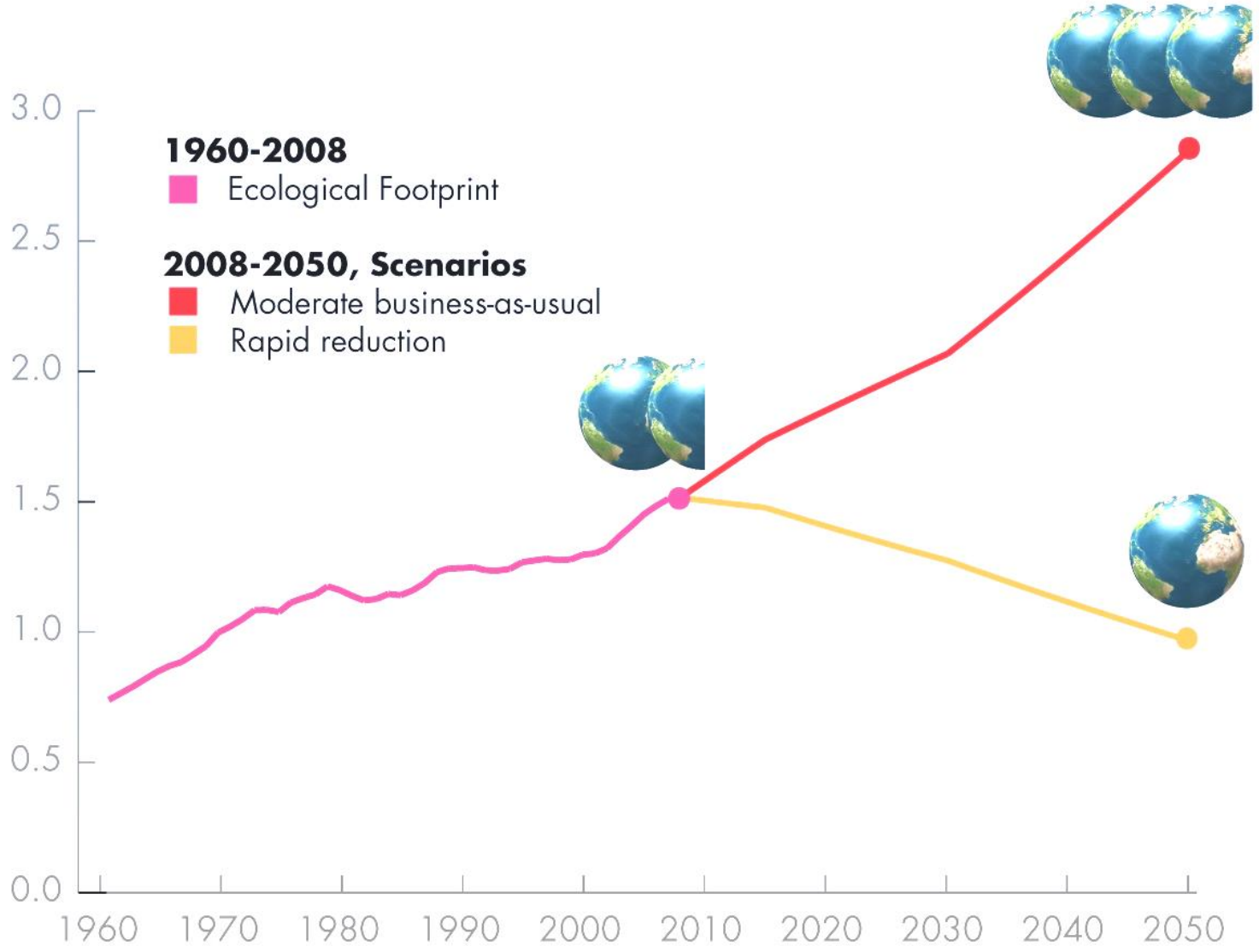
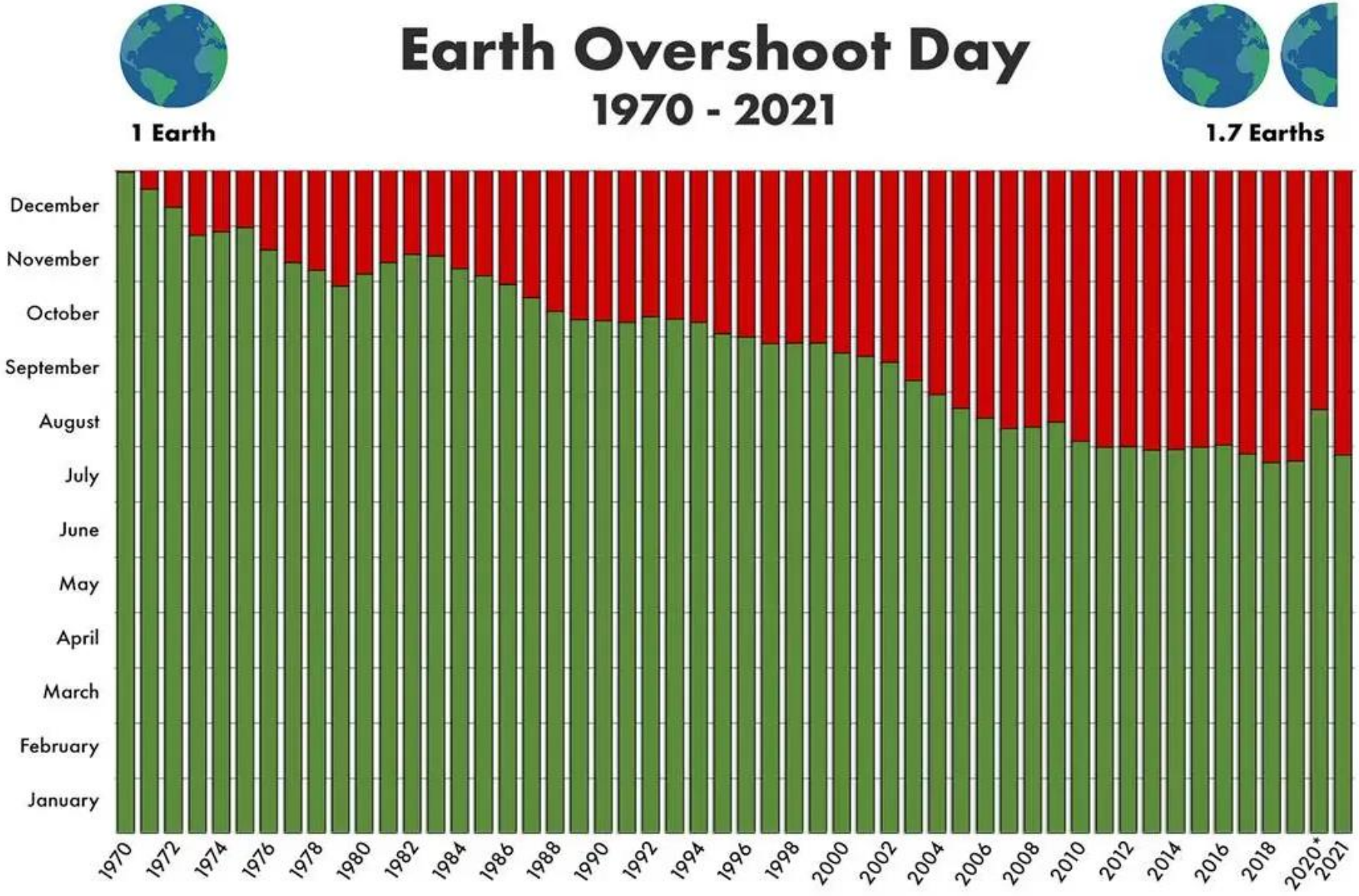



DHC Channel
DHC
DHC
DHC
DMM
Bitcoin
大盛堂書店
TSUTAYA
STARBUCKS COFFEE
SEIBU
JTB
Euphoria
クスリ
もんじゃ
洋服の青山
TREASURE NEWS SHIBUTAN

Immensive drop of CO_2 emissions in 2020

there are ways to reduce emissions even in the short term



CO_2-Buget

megatons until we reach +2 °C

1.079.389,866

Quickly reduce dependence on fossil fuels from Russia

45% renewable energy in the EU by 2030

Quickly reduce dependence on fossil fuels from Russia

1,236 gigawatts renewable energy in 2030

By 2030, 45 percent of the energy in the EU should come from renewable sources, instead of the previously planned 40 percent.

That would increase clean energy capacity to **1,236 gigawatts renewable energy**, compared to 511 gigawatts today - more than what was initially foreseen in the EU climate package.

According to the draft, the number of **solar power systems** should more than double by 2028, to 300 gigawatts.

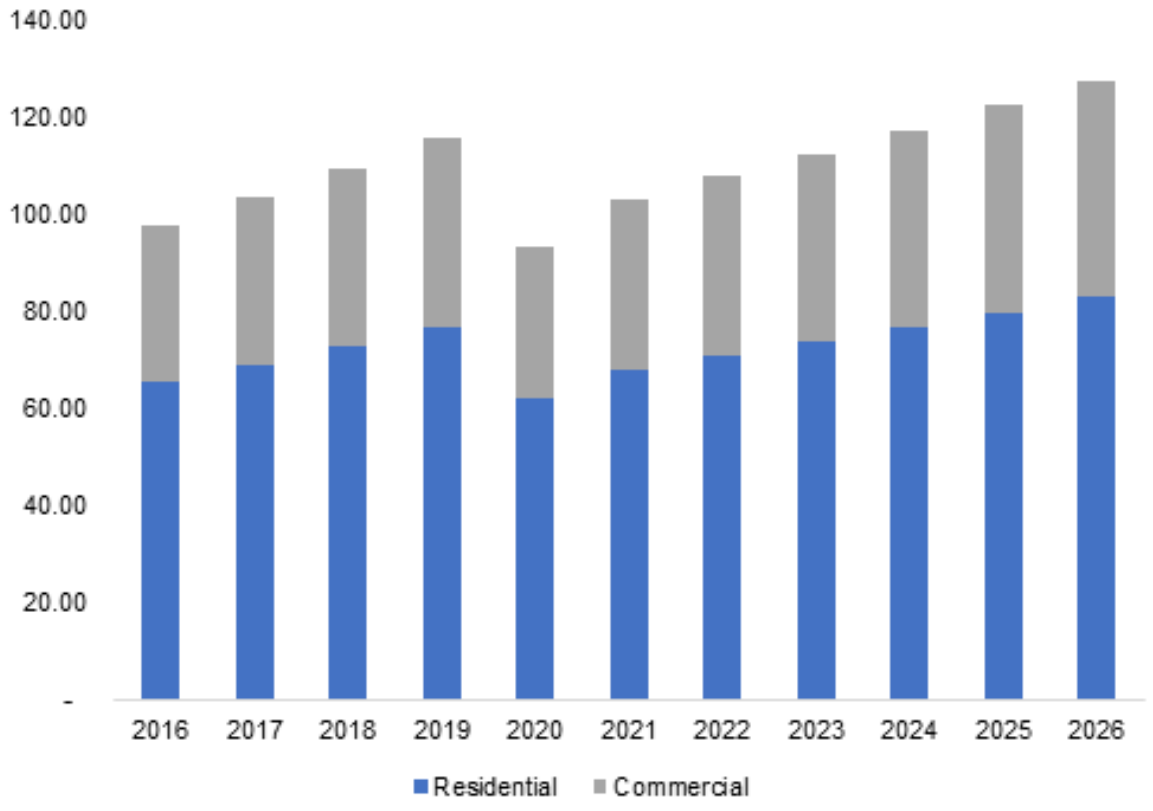
The Commission also relies on **climate-friendly hydrogen**, which is produced from green electricity.

At the same time, it is proposed to **reduce energy consumption** by at least 13 % by the end of the decade, instead of the 9% previously envisaged.

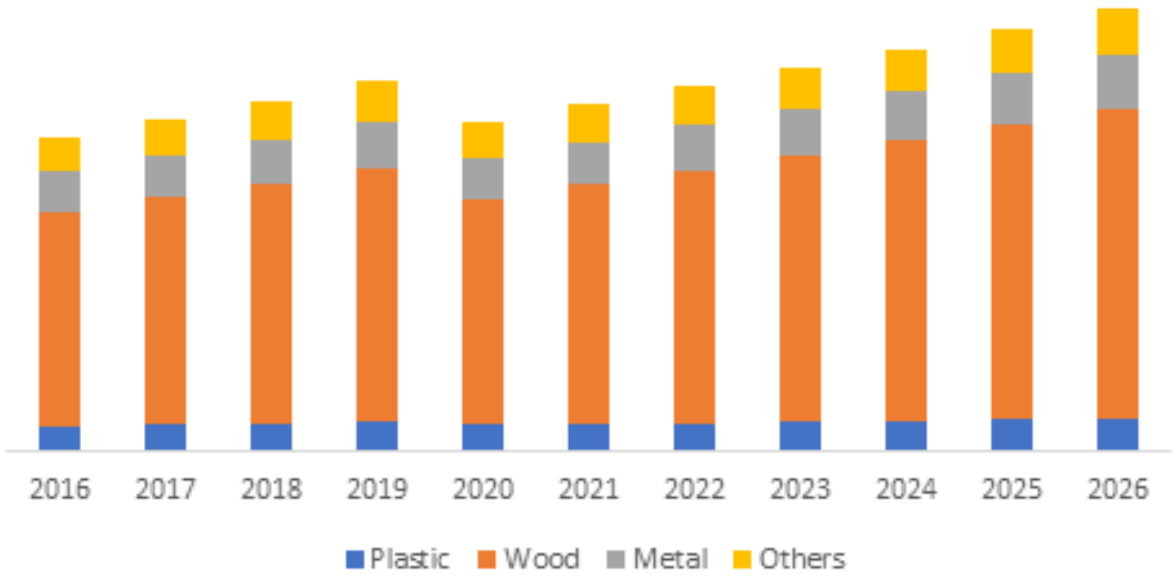
European Furniture Market 2016-2026

pandemic-related market decline in 2020 (Graphical Research, USA)

Europe Wooden Furniture Market Size, By Application, 2016 – 2026 (USD Billion)

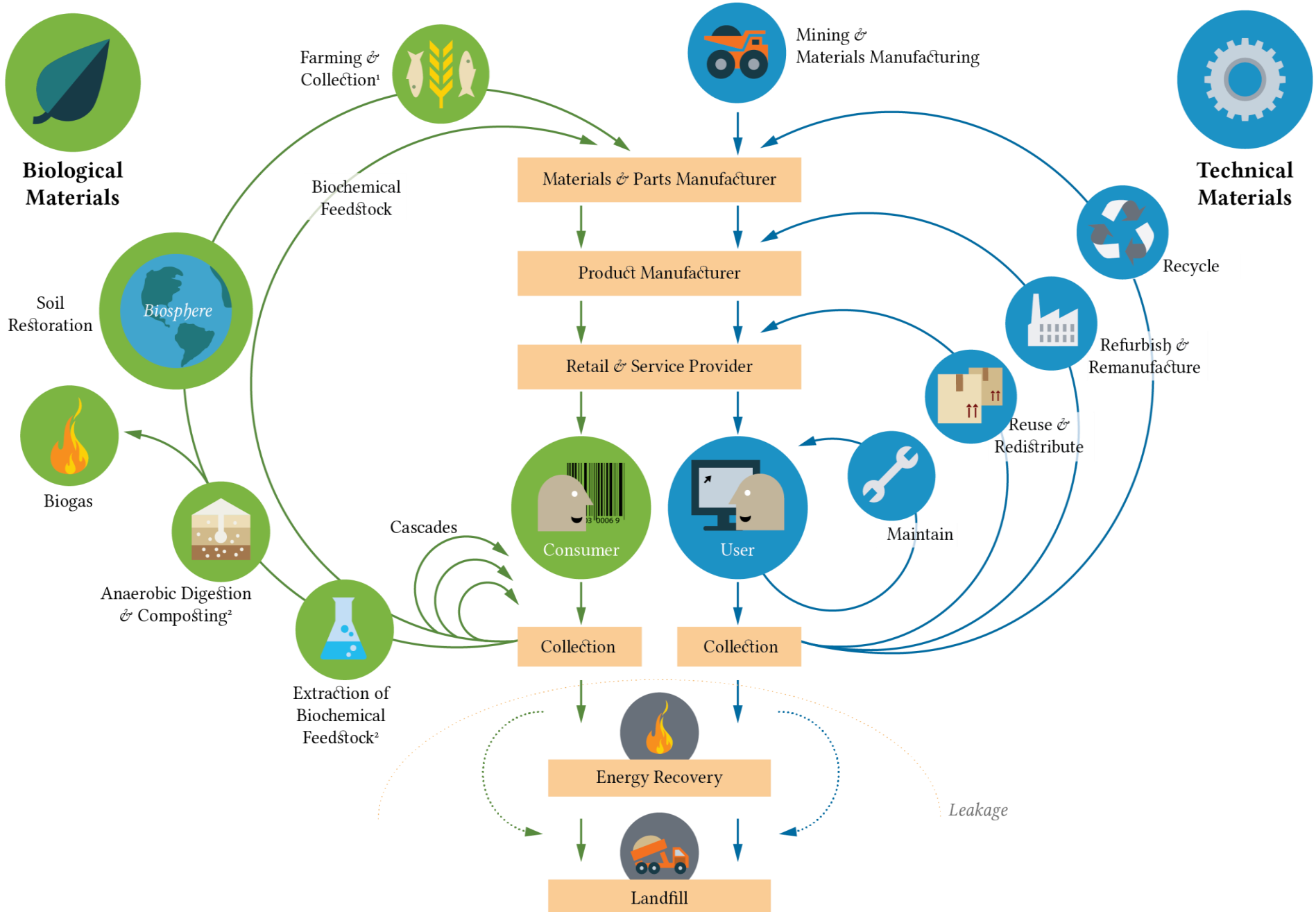


Europe Furniture Market Size, By Material, 2016 – 2026 (USD Million)



Digitization is/was a key value-added factor in the pandemic

online furniture sales will have doubled from 2020 to 2025 (formbar, Germany)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Leakage

Circular Business Model: Second Hand Furniture

NochMall – selling discarded furniture (Berliner Stadtreinigung, Germany)


NOCHMALL
ALLES AUSSER NEU

Circular Business Model: Second Hand Furniture

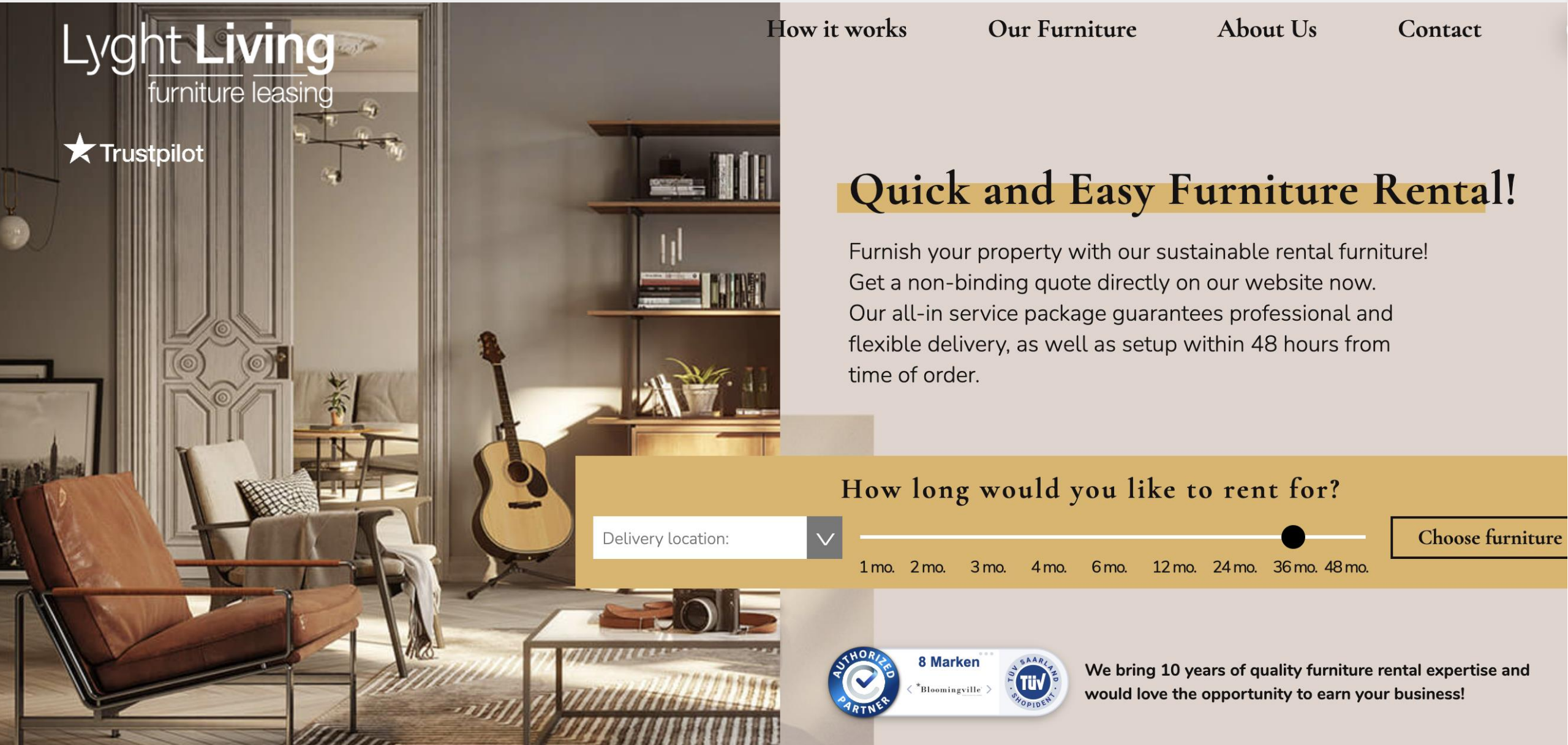
NochMall – selling discarded furniture (Berliner Stadtreinigung, Germany)

Circular Business Model: Rental Furniture

marketplace for rentals, rent-to-own or buy furniture new/secondhand (Beleco, Sweden)

Circular Business Model: Furniture Leasing

sustainable furniture rental (Lyght Living, Offenbach)



Circular Business Model: Refurbish Office Furniture

low carbon office furniture (rype office, London)

Circular Business Model: Furniture from recycled materials

Print your City – furniture from urban plastic waste (The New Raw, NL/Greece)

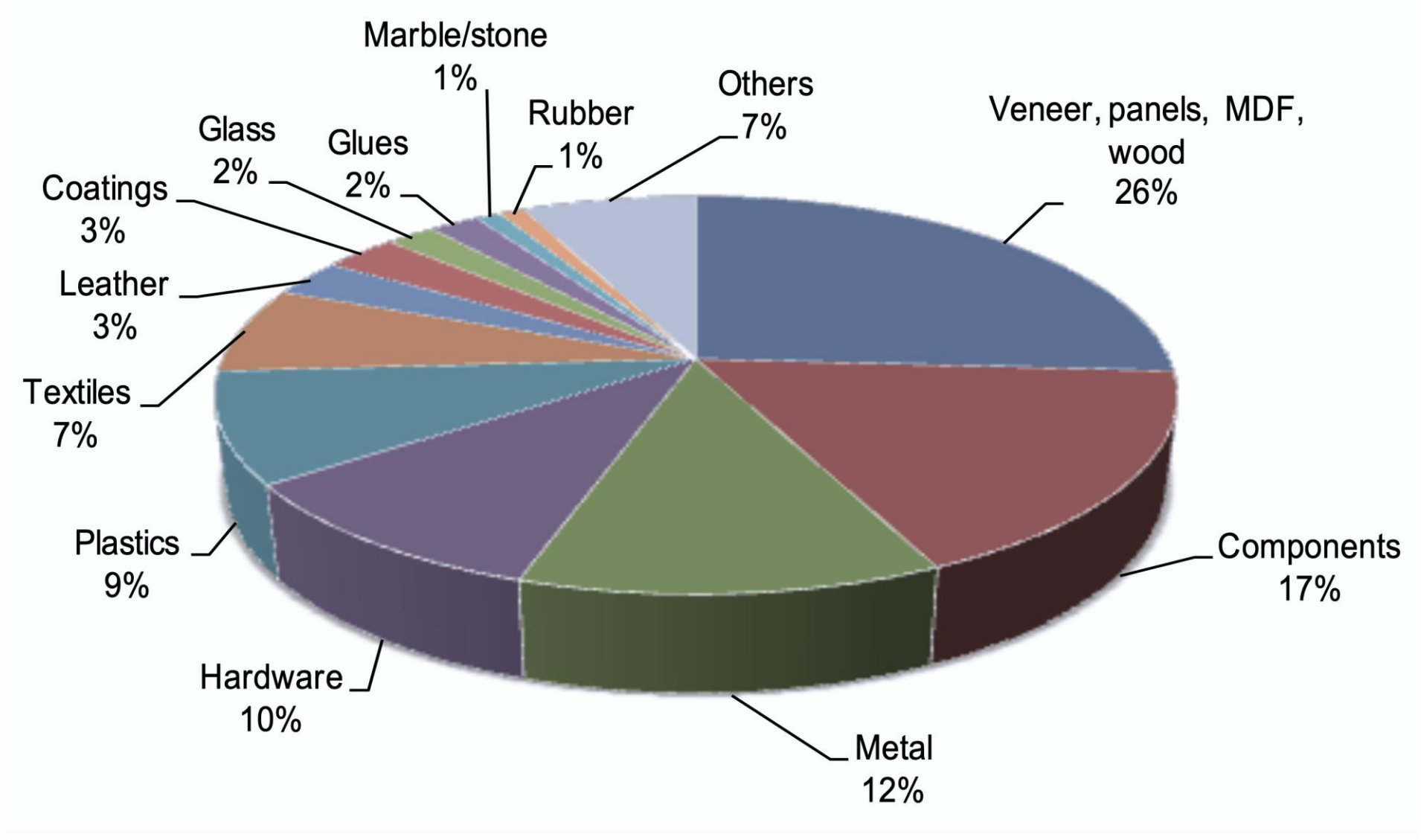

3D PRINTE
Henkel

Circular Business Model: Furniture from recycled materials

Print your City – furniture from urban plastic waste (The New Raw, NL/Greece)

EU 28 material mixture

share of materials used in furniture production (European Commission, 2014)



Dismantling possibilties receive higher value

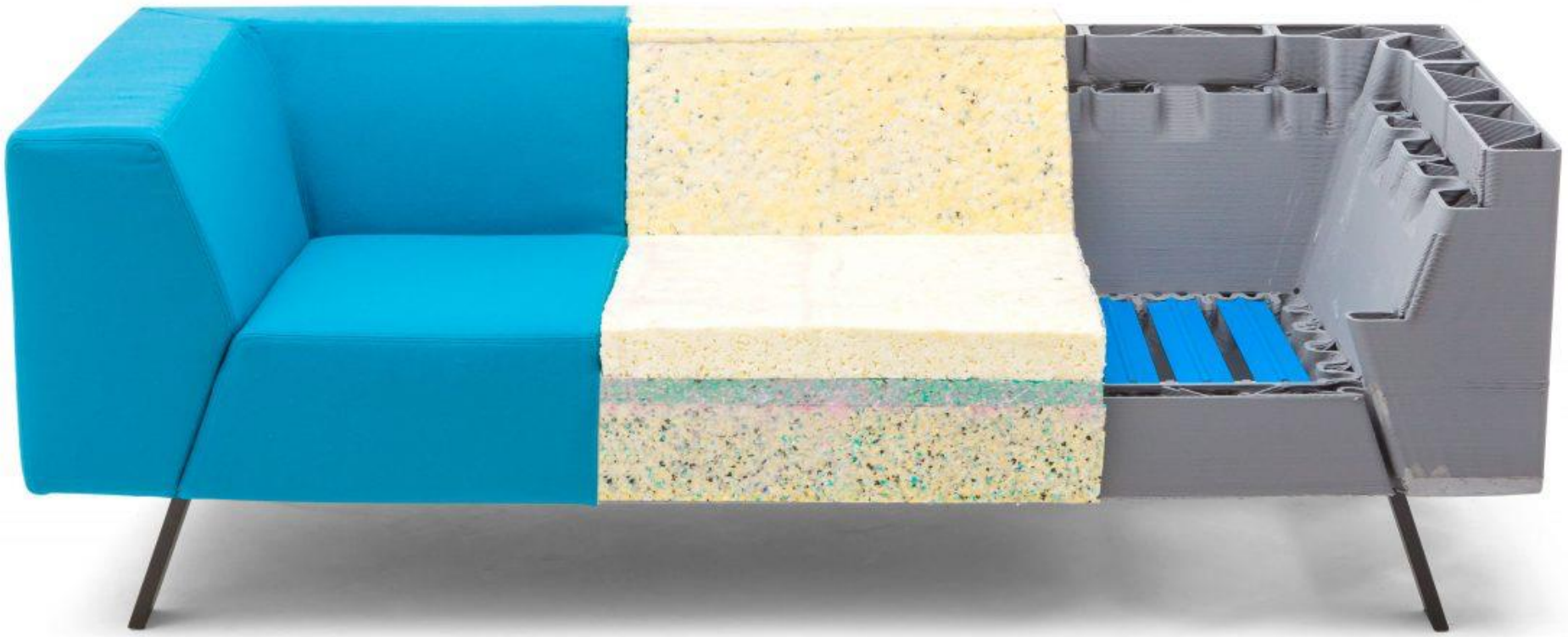
connection systems become the decisive selling point (IKEA, USM)

Costume

modular sofa system for circular economy (Stefan Diez for Magis/Italy)

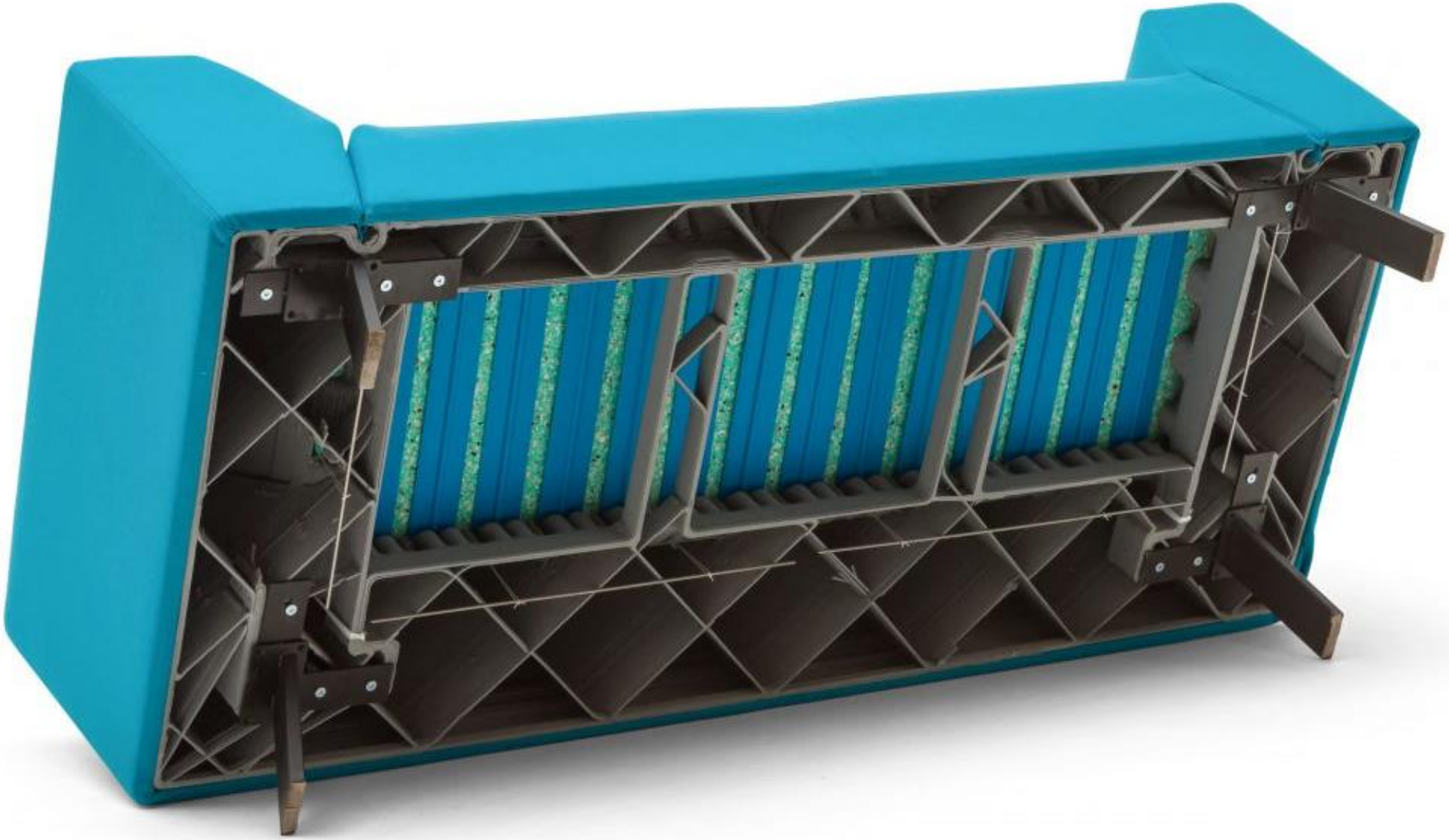
De Sett CE

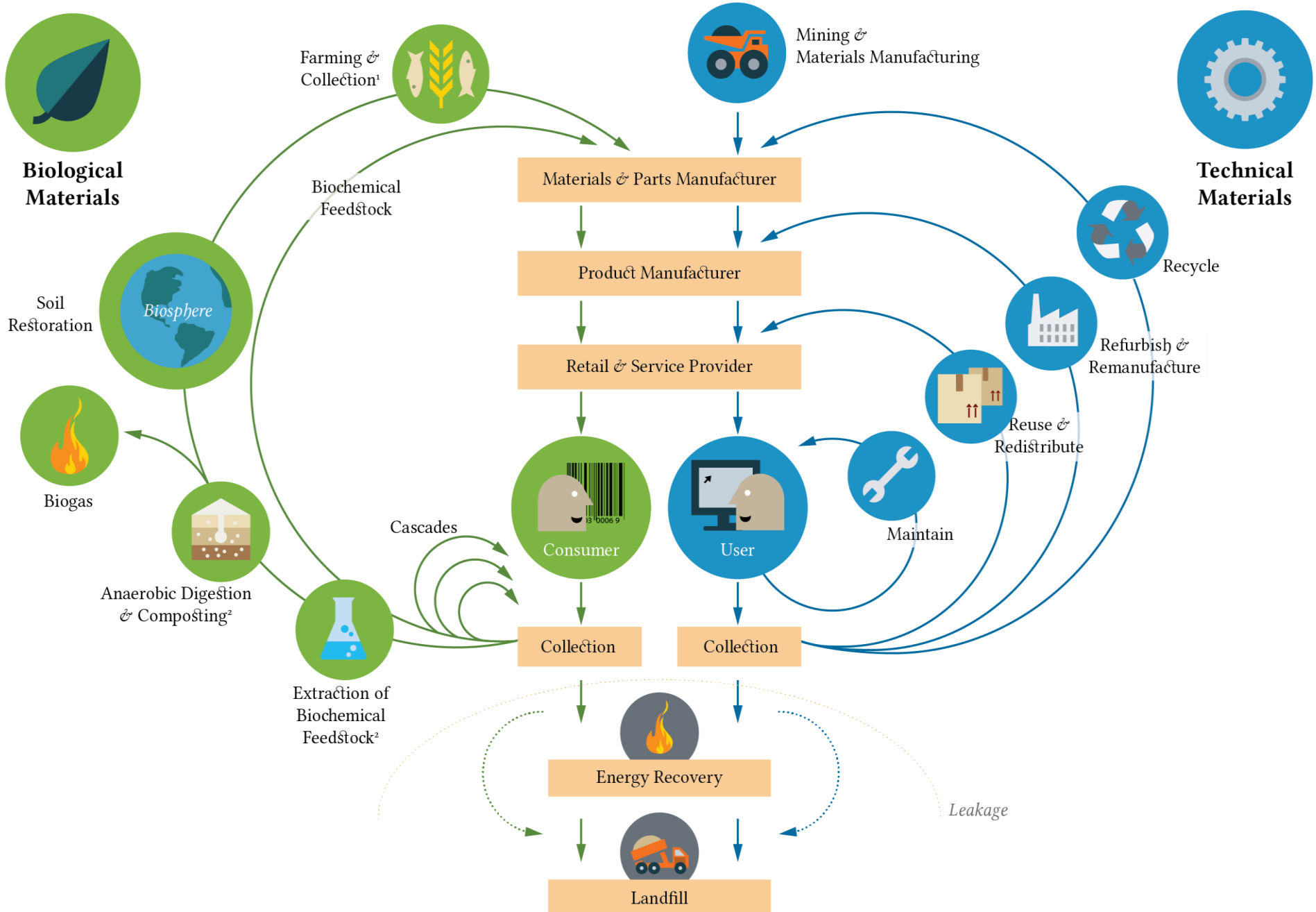
3D printed sofa body – 95 % recycled materials (Peter van de Water, Gispen, NL)



De Sett CE

can be re-used up to ten times without having to add new material (Gispen, NL)

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Lignoloc Wood Nails

world first collated nail made of wood (BECK Fastener Group, Austria)

Circular fiber-boards without glue or resin

post-consumer cellulose fibers, biodegradable, zero waste (Honext, Barcelona)

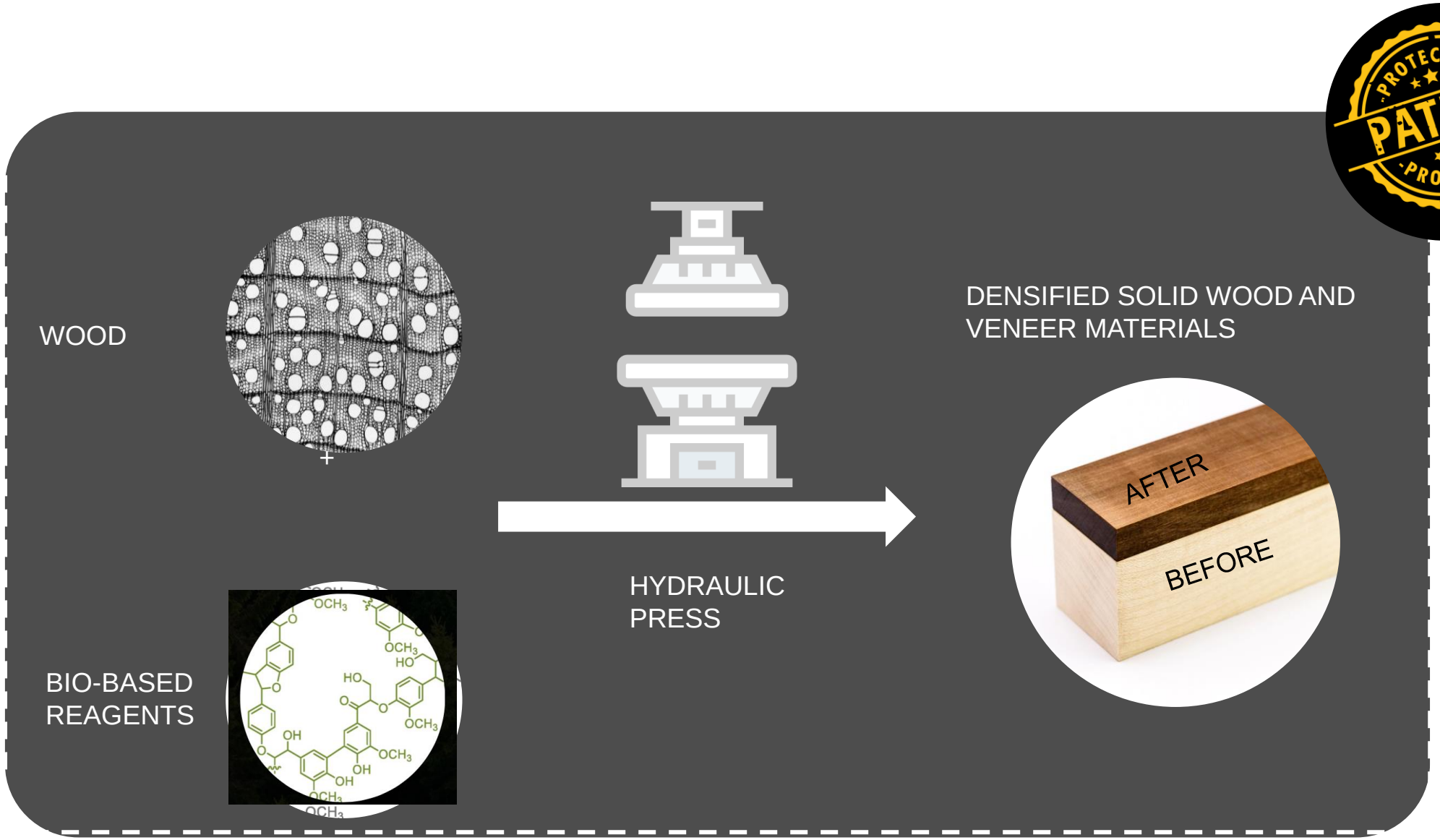
Nature-inspired enzymatic treatment

generate stronger bindings between cellulose fibres (Honext, Barcelona)


HONEXT

High-tech digital wood

densify European wood in tropical quality (Swiss Wood Solutions, Zurich)




BANK
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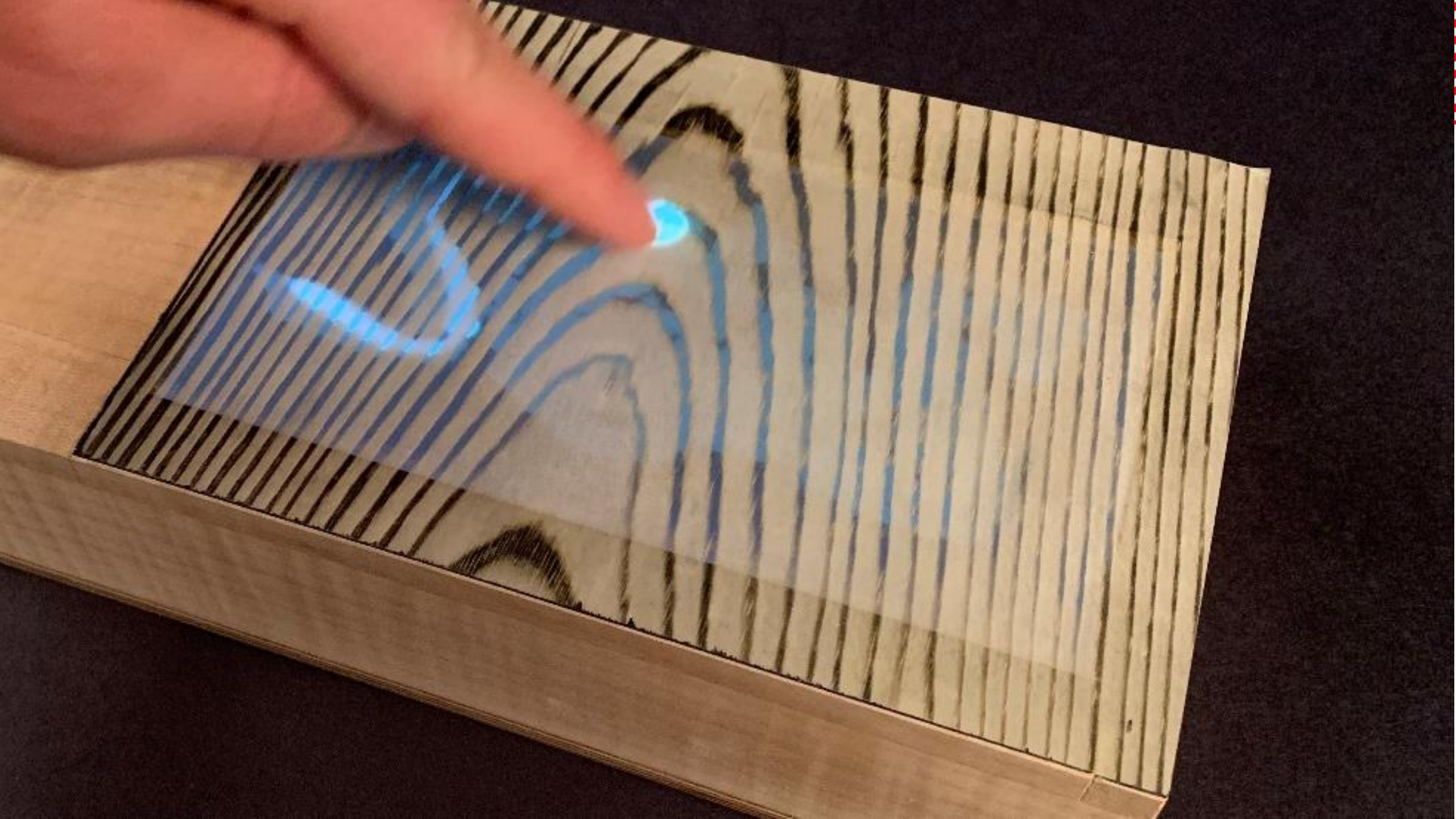
12/22
Leonhard Euler



New secondary ressources for boards

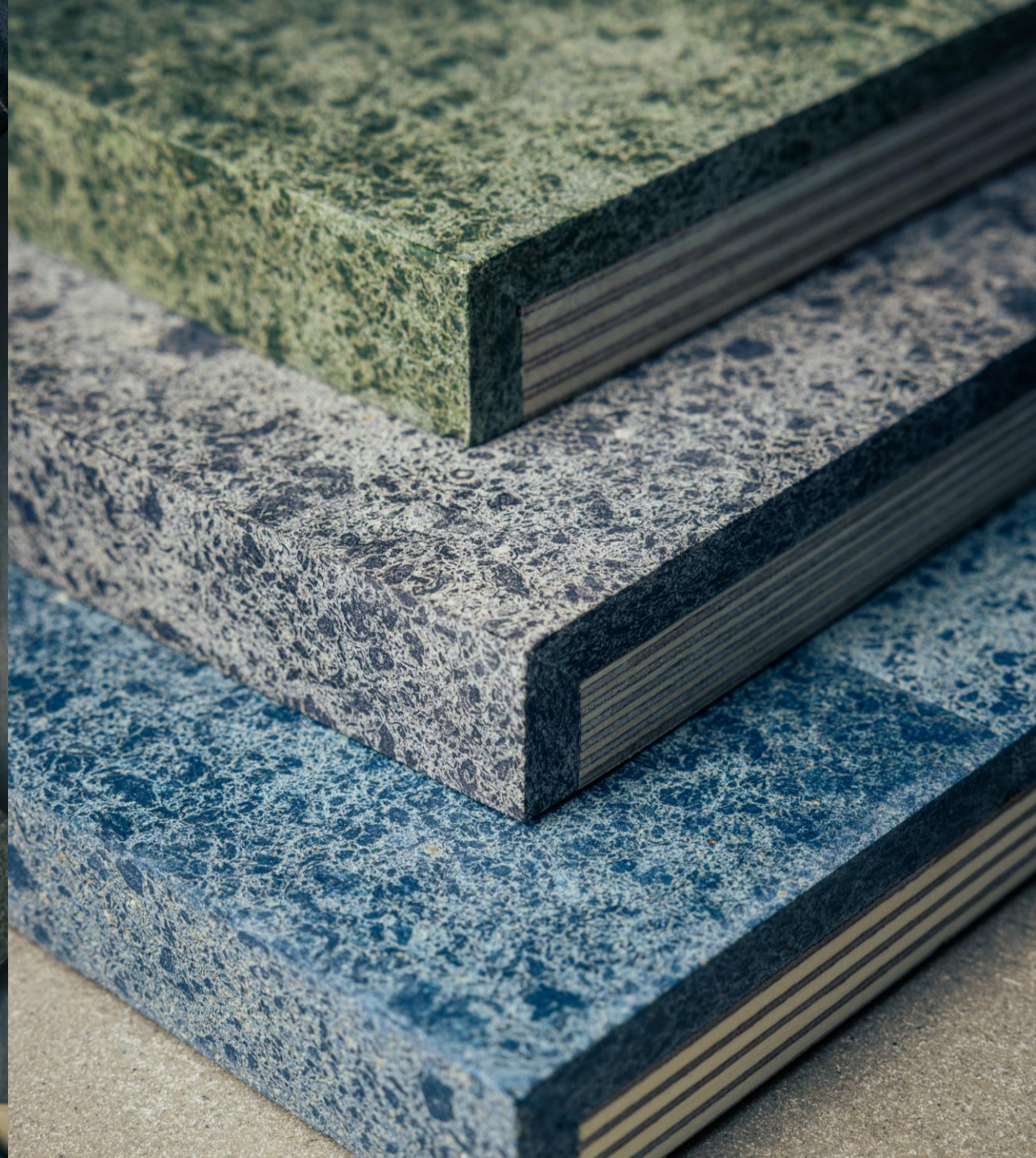
straw, fish-scales, seewead, sunflower fibers, artichoke thistles, coconut fibers

Fish scales as a raw material for architectural boards

thermoplastic biopolymer in the structure of the scales (Erik de Laurens, London)

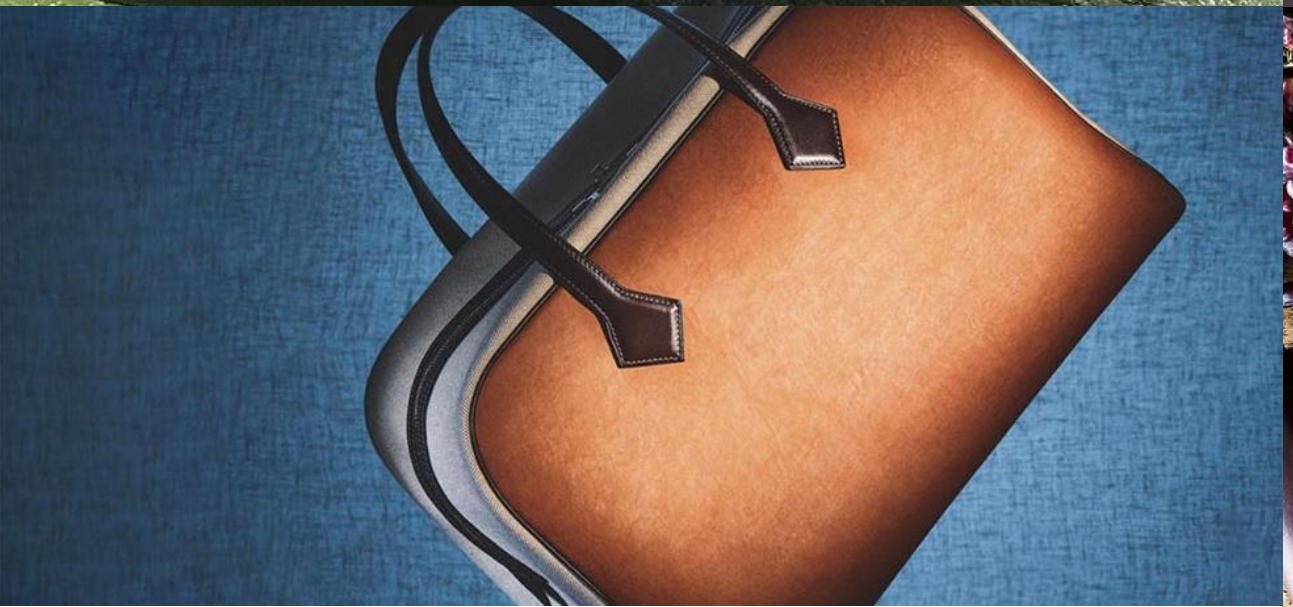
Scalite Interior Boards

100% made from fish scales, fire proof, biodegradable (Scale, France)



Leather alternatives for upholsterry

corc powder, orange peals, wine trester, cactus protein, hemp residues

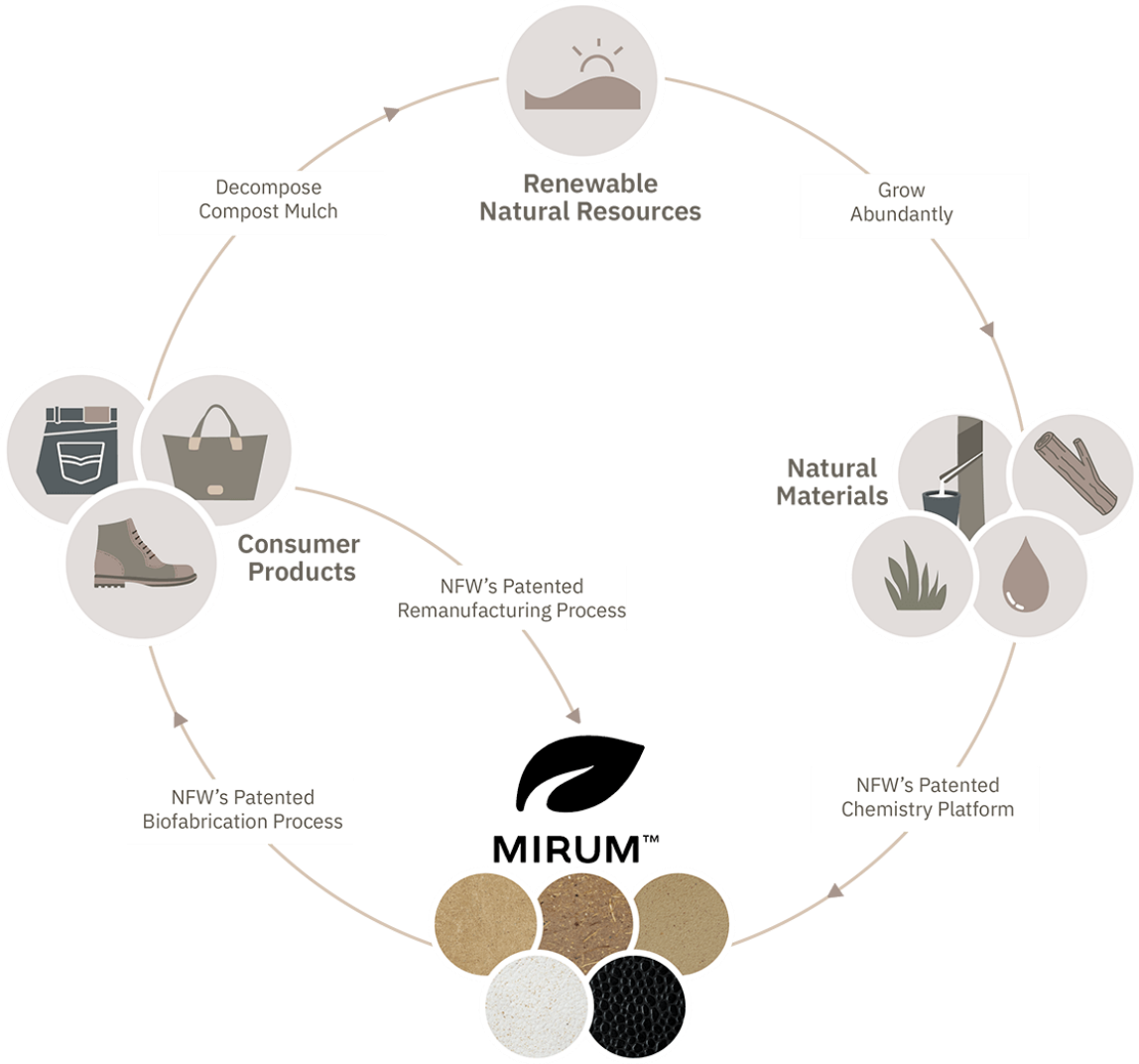


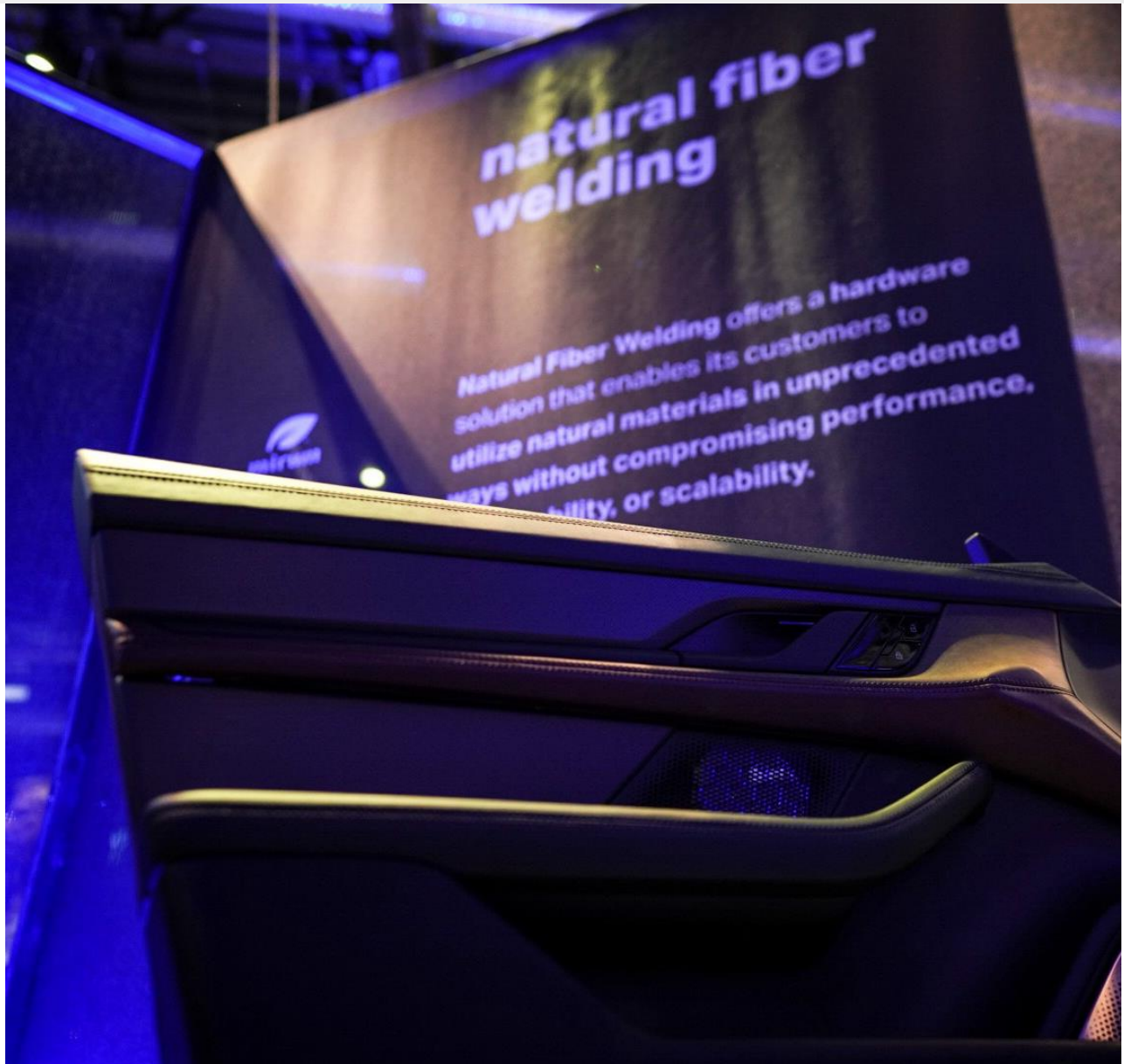
MIRUM leather-like material

100% free of plastic, recycable, biodegradable (Natural Fiber Welding, USA)

MIRUM leather-like material

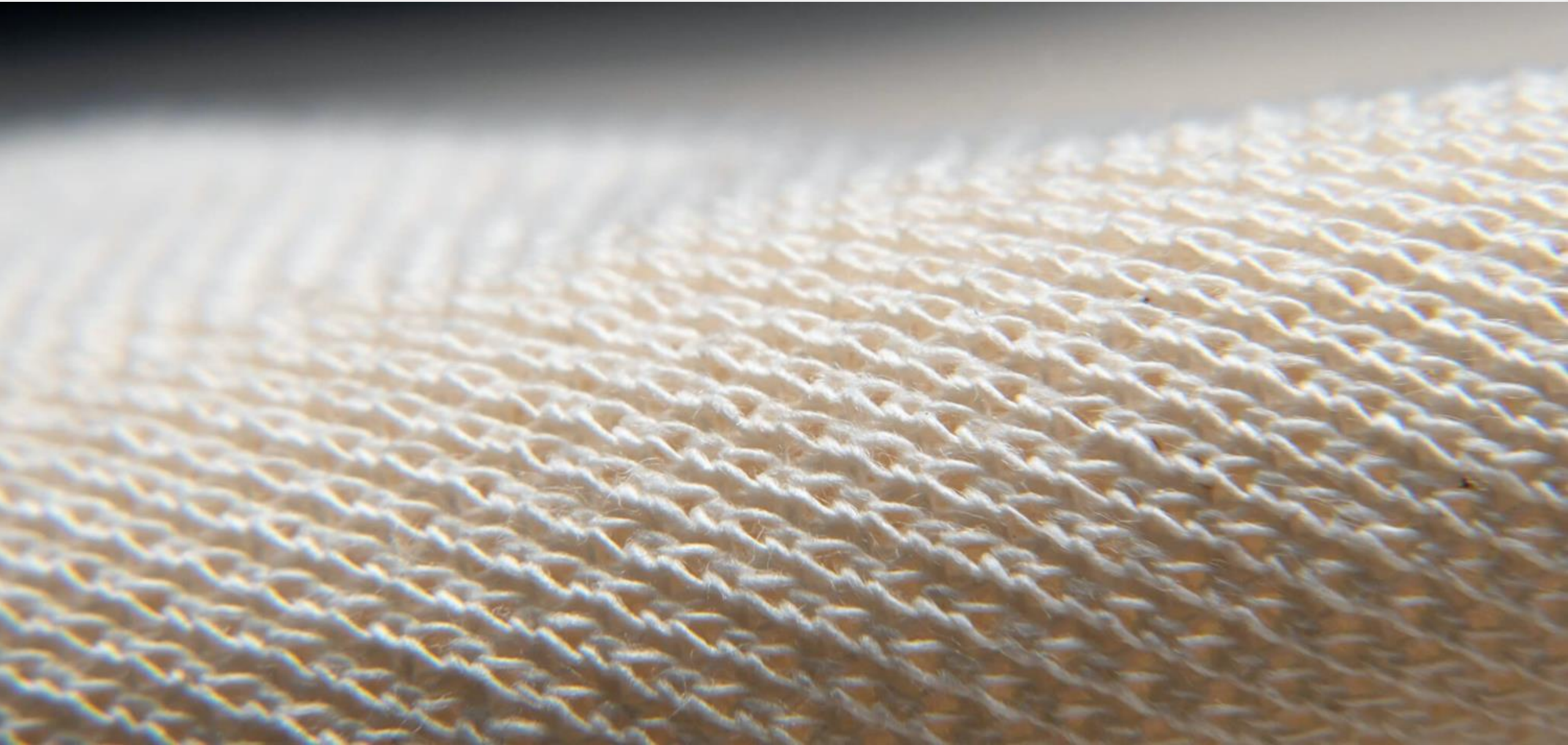
byproducts such as cork powder & coconut fibers (Natural Fiber Welding, USA)





CLARUS fabrics

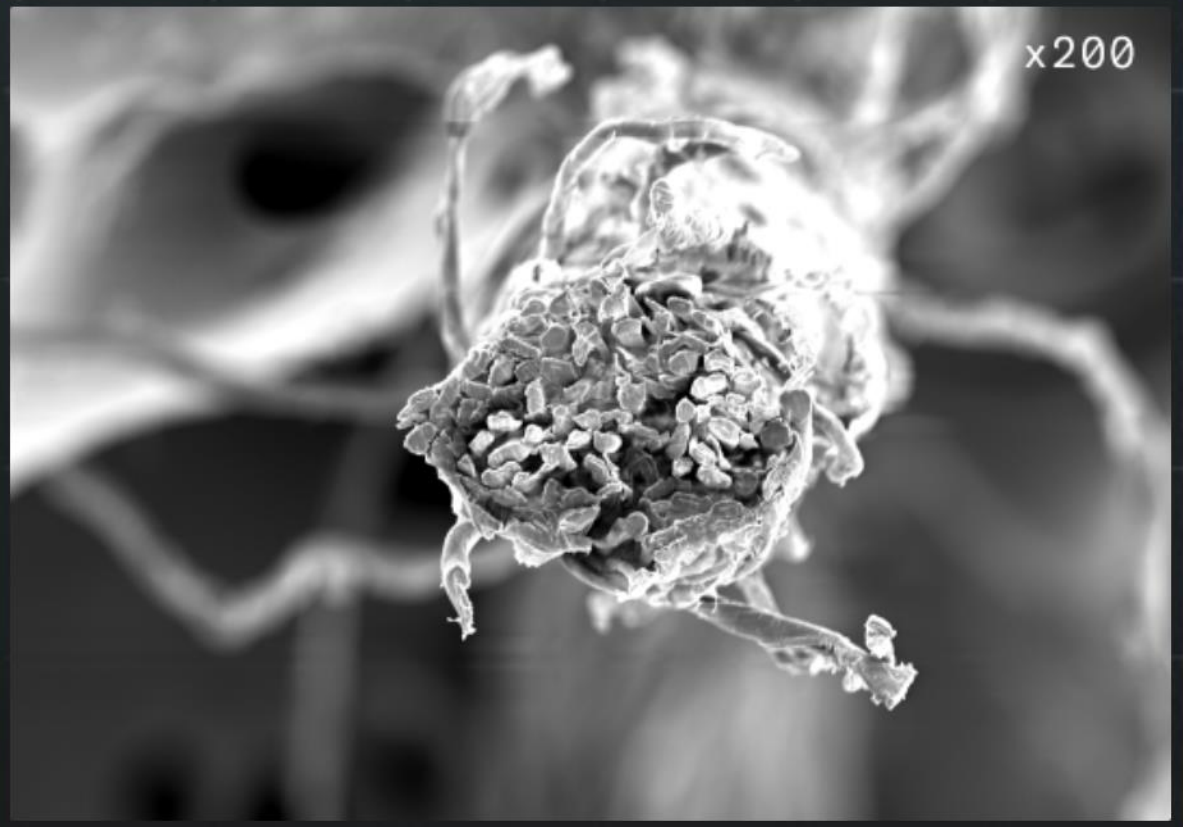
alternative to polyester based on fiber welded cotton (Natural Fiber Welding, USA)



CLARUS fabrics

provide synthetic-equivalent performance properties (Natural Fiber Welding, USA)

Microscopic cross-sectional view of cotton yarn before CLARUS® fiber welding: The structure of traditional spun (cotton) staple fiber yarns equates to poor moisture management and slow drying.



Microscopic cross-sectional view of cotton yarn after a particular type of CLARUS® fiber welding: CLARUS-engineered structural changes improve moisture management and drying time.

before

after

Soft foam made from leather scraps

suitable for sound absorber or upholstery (eco-softfiber, Germany)

Mushroom Materials

strength is due to the growth of the mycelium (KIT, Germany)

Mushroom Boards

high-strength and weather-resistant (KIT, Germany; Singapore Future City Lab)

Mushroom Acoustics 2.0

made from natural fibers, mycelium skin, fireproof paint (Mogu, Italy)

WHAT IS IT MADE OF?

Mogu was founded on the belief that it is possible to employ Nature's intelligence to radically disrupt the design of everyday products, seeking a finer balance between the man-made and the rhythms of the natural ecosystem.

Natural fibers (cotton , hemp)

Mycelium Skin

Fire-proof paint + colored paint

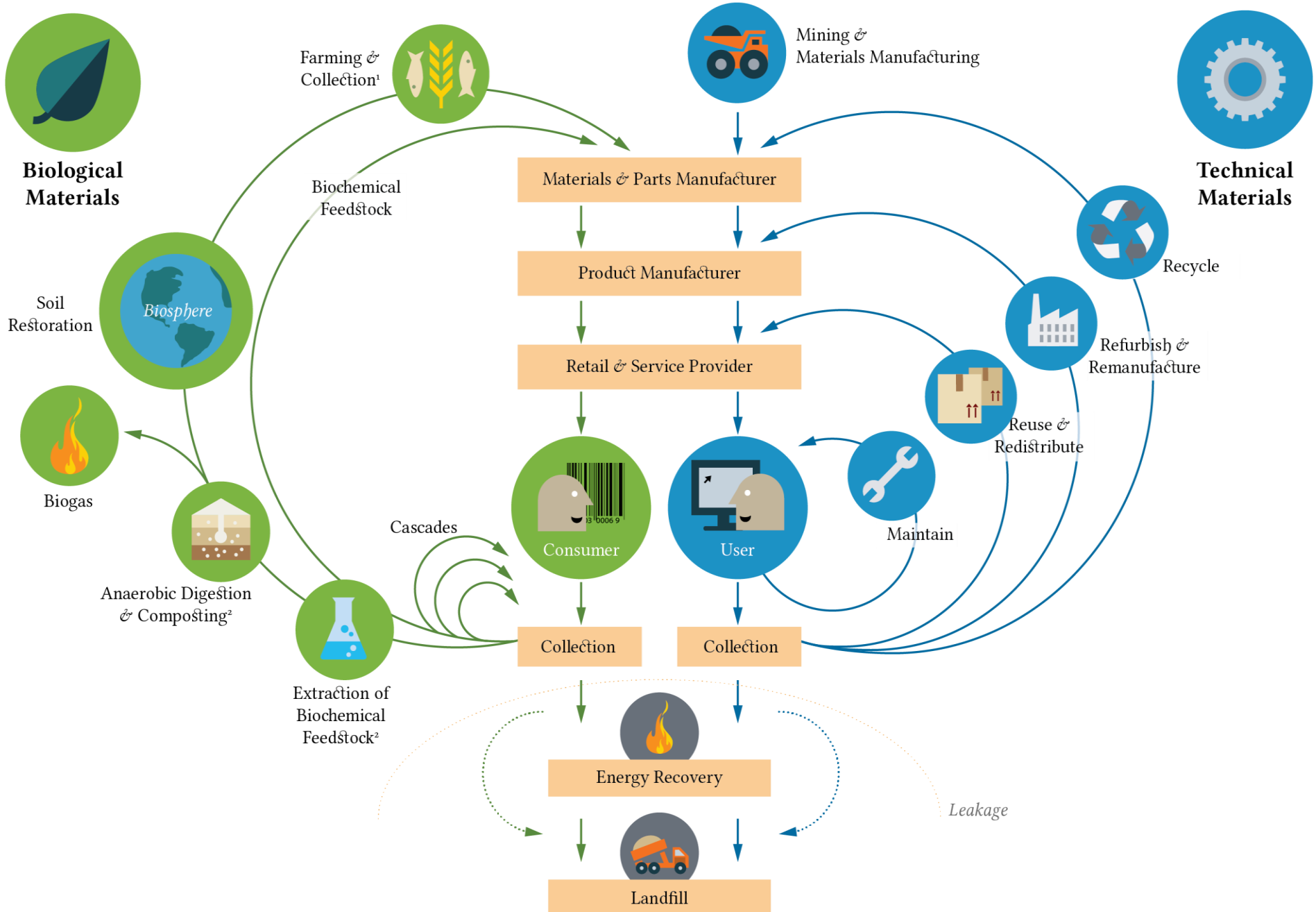
mogu.bio

EPHEA Mycelium Leather

market launch on March 6, 2022 at Paris Fashion Week (Sqim, Italy)

AirMycelium Foam

guiding the geometrical growth of mycelia (Ecovative Design, New York)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Future success in the furniture industry will be about setting up **circular business models**, making use of **digital design & manufacturing tools** and finding ways of using **sustainable materials**!

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European Furniture Industries Confederation

Thanks for your attention!

Hon. Prof. Dr. Sascha Peters
HAUTE INNOVATION – Zukunftsagentur für Material und Technologie, Berlin

www.haute-innovation.com

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Morning session: Key trends affecting the European furniture sector, with a focus on the coronavirus pandemic, sustainability and digitalisation

10:45 – 11:05

4. EU industrial policies, EU response to pandemic and Ukrainian crisis - opportunities and challenges for forest-based industries

Maila Puolamaa

European Commission,
DG GROW I.1 - Energy Intensive Industry & Raw Materials

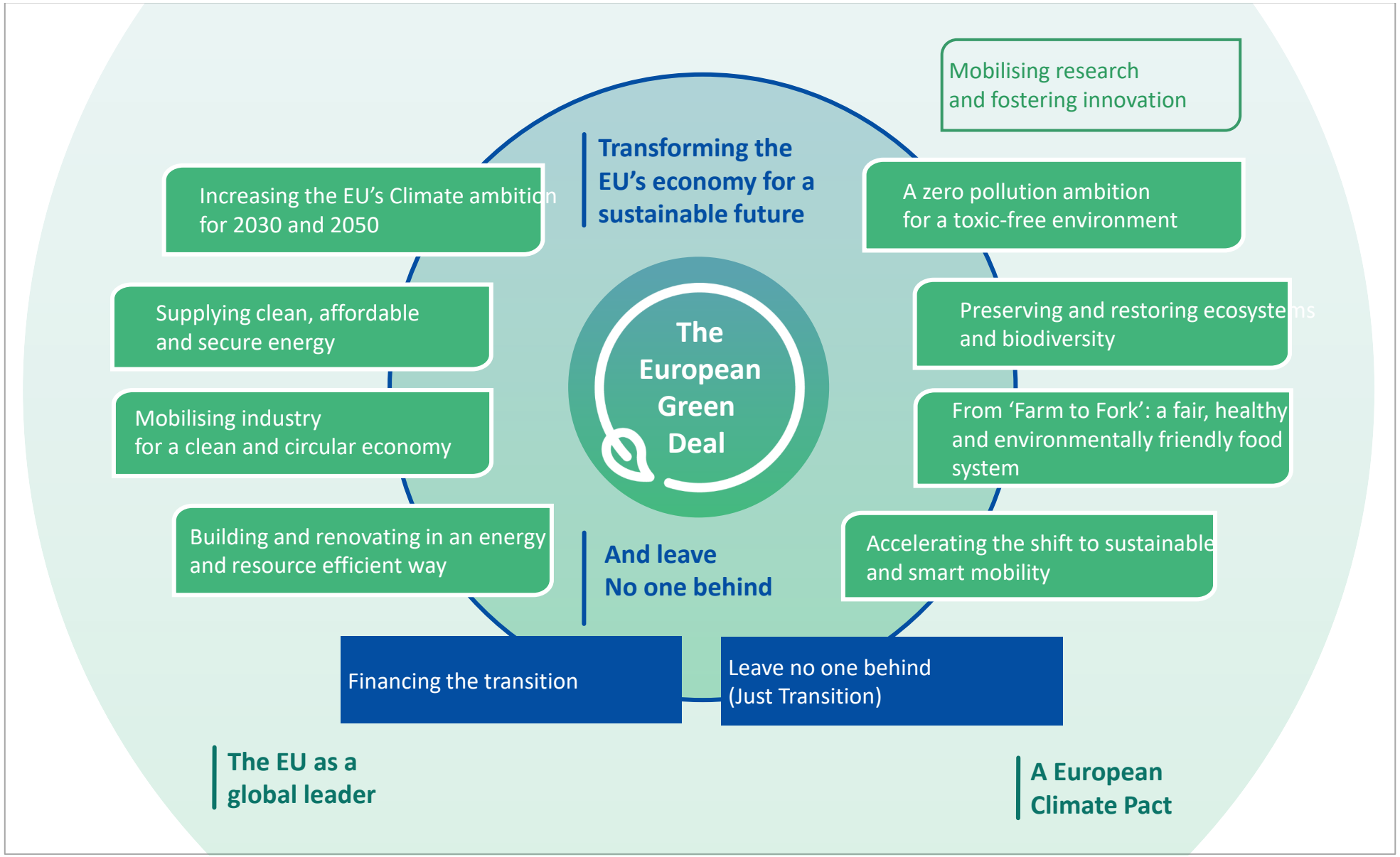
EFIC Conference
The EU Furniture Day 2022

EU industrial policies, EU response to pandemic and Ukrainian crisis – Opportunities and challenges to forest-based industries

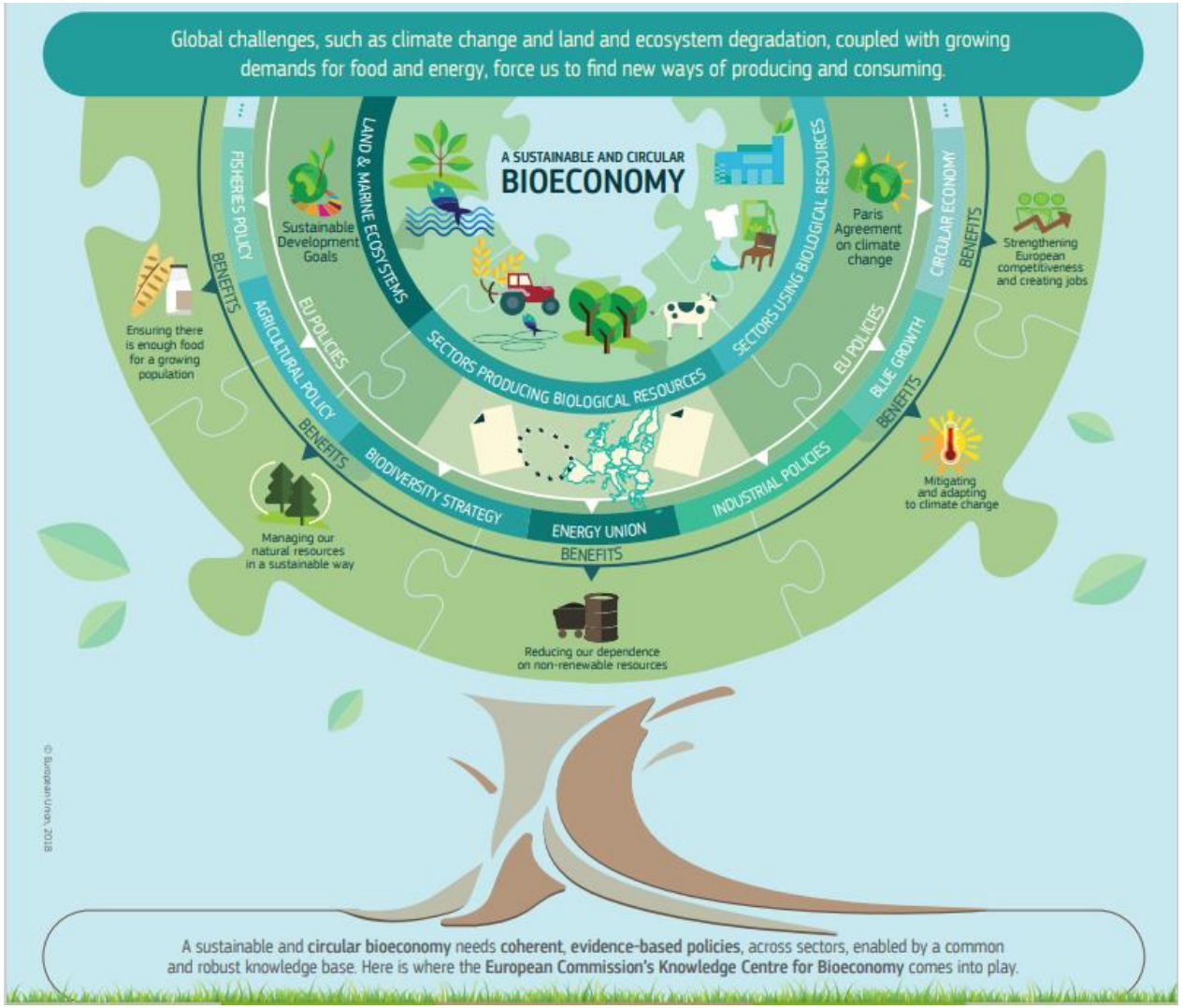
19 May 2022

Maila Puolamaa
H.1 Construction
DG Internal Market, Industry, Enterpreneurship and SMEs

The European Green Deal



The bioeconomy links to many EU policies



- The bioeconomy contributes to the European Green Deal, as well as industrial, circular economy and clean energy innovation strategies.
- They all highlight the importance of a sustainable, circular bioeconomy to achieve their objectives.

European Commission

The European bioeconomy is one of the EU's largest and most important sectors

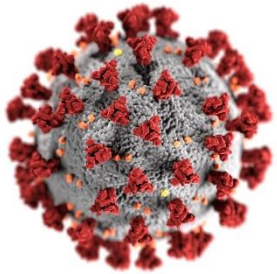
	EMPLOYMENT (MILLION JOBS)	TURNOVER (BILLION EUR)	VALUE ADDED (BILLION EUR)
AGRICULTURE	9.2	380	174
FORESTRY	0.5	50	24
FISHING AND AQUACULTURE	0.2	12	7
FOOD, BEVERAGES AND OTHER AGRO-MANUFACTURING	4.5	1 153	233
BIO-BASED TEXTILES	1.0	103	28
WOOD PRODUCTS AND FURNITURE	1.4	174	47
PAPER	0.6	187	46
BIO-BASED CHEMICALS AND PHARMA-CEUTICALS, PLASTICS AND RUBBER	0.4	177	56
LIQUID BIOFUELS	0.03	12	3
BIOELECTRICITY	0.01	11	3

- It includes agriculture, forestry, fisheries, food and other bio-based products as well as bio-energy.
- It generates 4.7% of the GDP and employes 8.9% of the labour force (2017)
- Forest-based industries provide almost 20% of value added.
- **Furniture industry: 1 M employees 120 000 companies (88% micro) with 96 € billions turnover.**

European Commission

Circular Economy Action Plan – A key to recovery

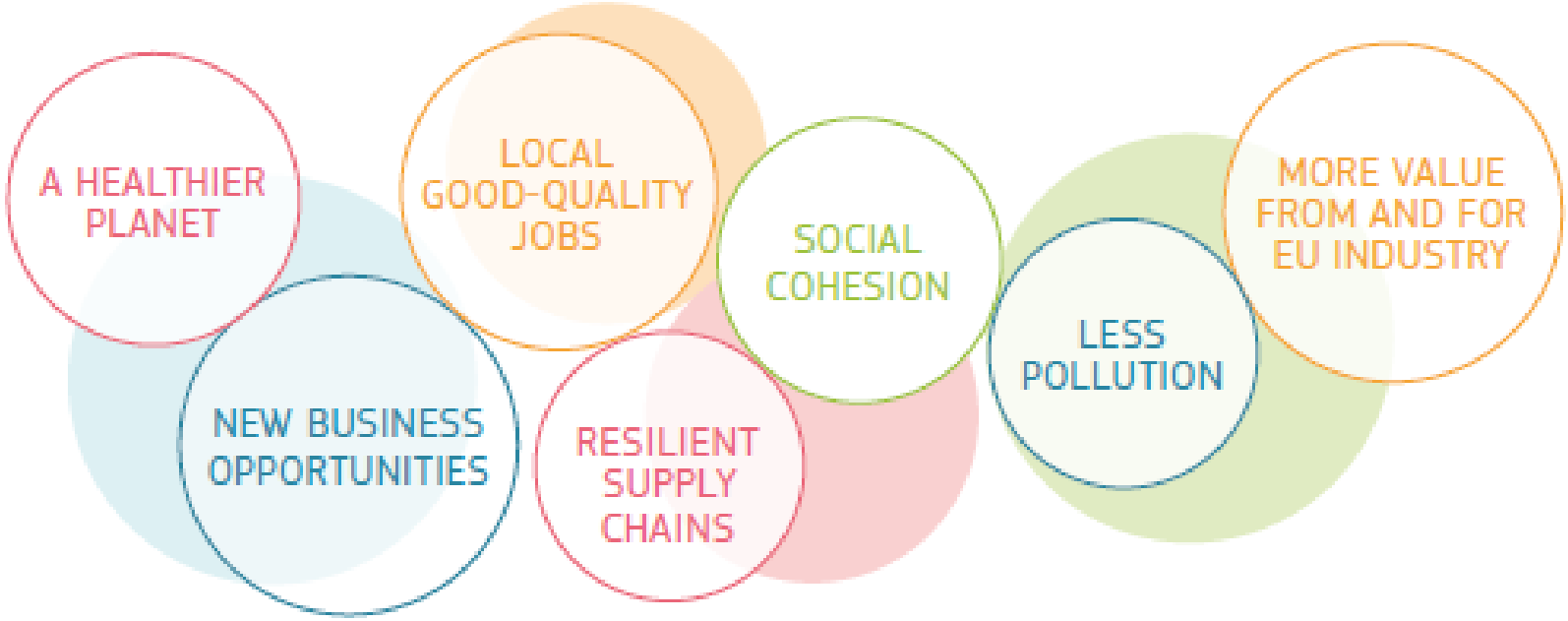
Disruption of global supply chains



Job insecurity

Circular economy is expected to:

Impacts



European Commission

Design drives innovative circular bio-based business and environmental friendliness

European Commission

Zero Pollution Action Plan

Vision 2050: *Air, water and soil pollution is reduced to levels no longer harmful to health and natural ecosystems thus creating toxic free environment*

Targets by 2030:

Air:	>55% less premature deaths caused by air pollution
Water:	50% less waste, plastic litter at sea and 30% less microplastics to the environment
Soil:	50% less nutrient losses and chemical pesticides
Biodiversity:	25% less EU ecosystems threatened by air pollution
Noise:	30% less of people chronically disturbed by transport noise
Waste:	50% less residual municipal waste and total waste generation significantly reduced

Key action areas:

1. Improve human health
2. Boost change across society
3. Protect natural ecosystems and biodiversity:
4. Reduce pollution from production and consumption
5. Implement and enforce pollution laws more strictly
6. Minimise the EU's external pollution footprint and promote change globally
7. Promote digital solutions for zero pollution
8. Stimulate knowledge and innovation

The Industrial Strategy Update (ISU)

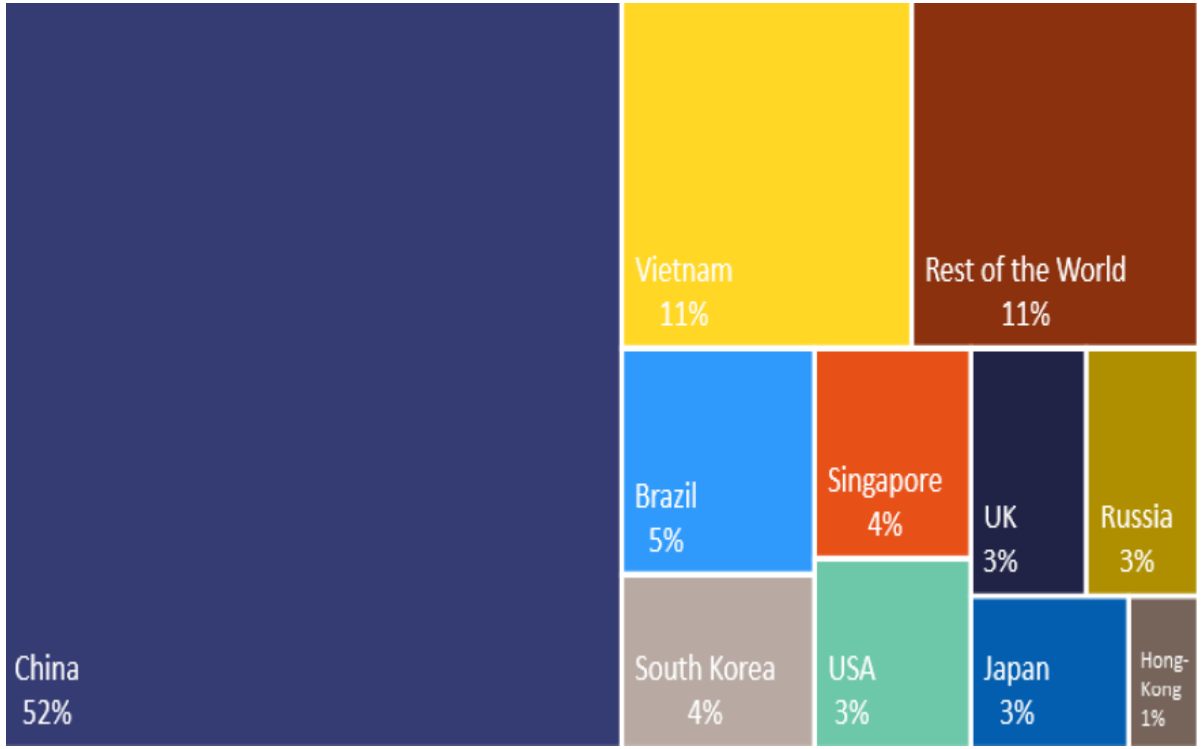
Single Market Emergency Instrument

- Structural solutions for circulation of goods and services *(e.g. Green Lanes)*
- Improved transparency on export restrictions and services restrictions *(e.g. notifications)*
- Faster product availability and enhanced market surveillance *(e.g. standard setting & sharing, fast track conformity assessment)*
- **Strengthened public procurement cooperation**

Green and digital transition

- **A coherent and stable regulatory framework (*Fit for 55*)**
- Access to capacities and infrastructure *(Energy and Industry Geography Lab)*
- **Finance for innovation and deployment *(Horizon Europe, State Aid rules, renewed Sustainable Finance Strategy)***
- Access to raw materials *(European Raw Materials Alliance)*
- Decarbonised energy *(Support the uptake of corporate renewable power purchase agreements)*
- **The right skills *(Skills Roundtables)***

EU strategic capacity: strong in some technologies, highly dependent for others



European Commission

EU strategic capacity: strong in some technologies, highly dependent for others

Main take-aways

1. Dependencies are **not limited to products**
2. Strategic capacity in key technologies is essential to **deliver on green/digital ambitions**
3. EU has **strengths and weaknesses**: highly competitive in some areas, highly dependent in others
4. Can **build on succesful examples (e.g. alliances)**

Advanced manufacturing
>30% of new patents are generated in the EU

Batteries
EU catching up: #2 manufacturer of Li-ion batteries by 2024
Alliance

Semiconductors
No leading edge manufacturing in the EU
Alliance

Hydrogen
Half of electrolyser manufacturers are in the EU incl. the larger ones
Alliance

Solar
EU position deteriorated: top-10 PV module manufacturers almost all in Asia
Alliance

Cloud
Largest EU cloud provider holds <1% of European market
Alliance

European Commission

The Fit for 55 Package – Overview

December 2021:
-Deforestation –free products,
-Sustainable carbon cycles,
-Energy performance of buildings etc.

March 2022:
-Ecodesign for sustainable product regulation,
-Construction products regulation,
- etc.

European Commission

New Guidelines on State aid for climate, environmental protection and energy (CEEAG)

- On 21 December, the Commission endorsed **the revised guidelines** to ensure that **EU State aid rules play their full role in supporting the European Green Deal and the Fit for 55 package** in order to tackle climate change, pollution and loss of biodiversity. The revised guidelines aim to:
  - Open up and facilitate to a maximum and far above the previous guidelines those aid measures that are **2030/2050 compliant**, for example for renewables.
  - End support for the most polluting fossil fuels, not compatible with the Green Deal.
  - **Set conditions for other measures, e.g., for natural gas, to ensure that they are 2030/2050-proof, i.e., no displacement of cleaner technologies, no lock-in effects**.
- **Green measures will be facilitated through**:
  - **Enlarging the scope** of categories of investments and technologies that Member States can support (e.g., industrial decarbonisation, clean mobility, **resource efficiency**, biodiversity, **replacement of fossil-based raw materials or feedstock with bio-based raw materials or feedstock)** to cover all technologies that can deliver the European Green Deal (e.g., renewable and low carbon hydrogen, e-storage).
  - **More flexible rules**: Higher aid amounts (100% of funding gap) and new aid instruments (e.g., contracts for difference), simplified assessment of cross-cutting measures, generally no individual notifications for large green projects within approved schemes.
  - Endorsing **green security of supply**: allow more generous contract terms for green technologies, allow stricter environmental requirements.

European Commission

Global value chains and Europe’s resilience

European Commission

RePowerEU, 18 May 2022

HOW TO BOOST THE DEVELOPMENT OF CLEANER INDUSTRIAL PROCESSES

Electrification, energy efficiency and uptake of renewables could allow industry to save **35 bcm** of **natural gas by 2030** beyond Fit for 55 targets

Largest reductions in gas, almost **22 bcm** could be made from **non-metallic minerals, cement, glass and ceramics, chemicals** production and refineries

THE SHIFT TO CLEAN INDUSTRY:

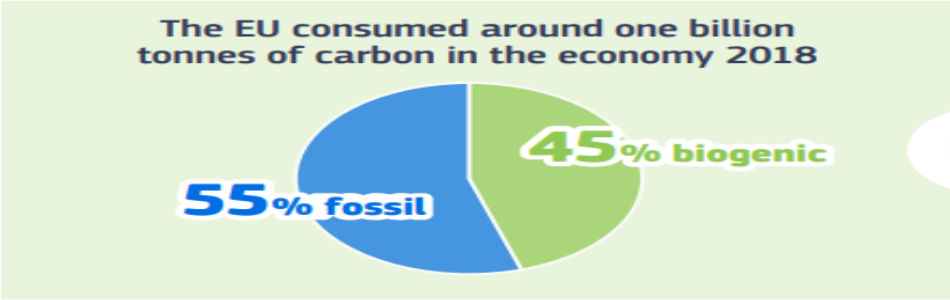
- Electrification of industrial processes
- Renewable hydrogen deployment
- Circular use of materials
- Use of alternative biobased or renewable inputs
- Waste valorisation
- Energy efficiency

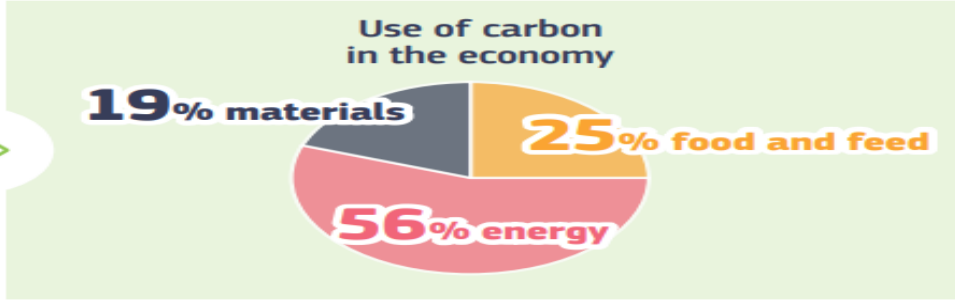
Around **30%** **of EU primary steel production** is expected to be decarbonized on the basis of renewable hydrogen by 2030

Sustainable carbon cycles

SUPPORT A NEW INDUSTRIAL VALUE CHAIN FOR THE SUSTAINABLE CAPTURE, USE, TRANSPORT, AND STORAGE OF CARBON

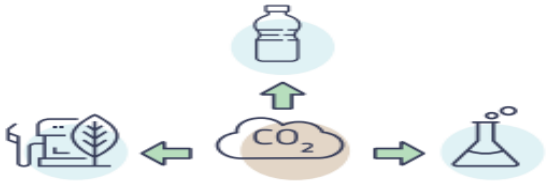
In addition to decarbonising its energy system, the EU will also need to rethink its **sourcing of carbon** as feedstock for industrial processes.





Creating a market for capture, use, and storage of CO_2

Replace energy-intensive materials, such as cement and steel, with bio-based materials which store carbon for a long period of time.



Recycle carbon transforming CO_2 from a waste product to a **resource** and using it as **feedstock** for the production of materials, chemicals and fuels. At least 20% of the carbon used in the chemical and plastic industries should be from non-fossil sources by 2030.

Remove carbon from the **atmosphere. By 2030 5Mt of CO_2** should be annually removed from the atmosphere and permanently stored through technological solutions.

European Commission

EFIC
European Furniture Industries Confederation

Morning session: Key trends affecting the European furniture sector, with a focus on the coronavirus pandemic, sustainability and digitalisation

11:05 – 11.55

5. Panel discussion: Pandemic and post pandemic supply chain development and material sourcing, implications of Ukrainian crisis and link to circularity and climate ambitions

Jan Kurth
Managing Director of VDM

Stina Wallström
Public Affairs Manager IKEA Range and Supply

Giovanni del Vecchio
CEO at Giorgetti

Martin Brettenthaler
CEO at Swiss Krono

Andre Dorner
Managing Director at Blum Germany

EFIC
European Furniture Industries Confederation

Morning session: Key trends affecting the European furniture sector, with a focus on the coronavirus pandemic, sustainability and digitalisation

11:55 – 12:00

6. Wrap up morning session

Mariam Zaidi

Moderator

Lunch break & networking

12:00 – 13:30

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Afternoon session: The furniture industry in the twin (green and digital) transitions & overall needs of the industry to remain competitive at global level

13:30 – 13:35

7. Introduction to afternoon session

Gabriella Kemendi

EFIC Secretary General

EFIC
European Furniture Industries Confederation

Afternoon session: The furniture industry in the twin (green and digital) transitions & overall needs of the industry to remain competitive at global level

13:35 – 13:55

8. Commission package of proposals March 2022: proposal for an Ecodesign for Sustainable Products Regulation & implications for the European furniture industry

Matjaž Malgaj

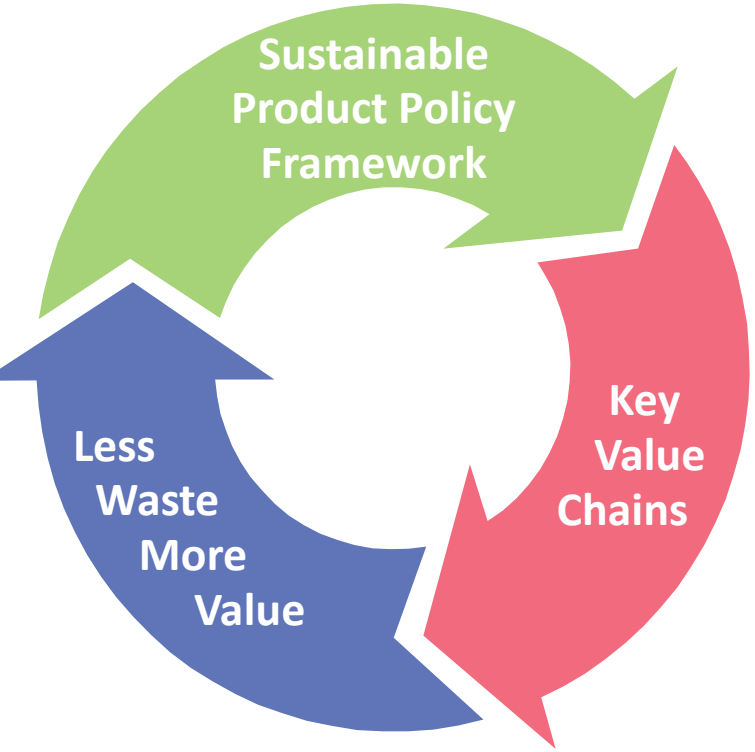
European Commission, Head of Unit DG ENVI B4, Sustainable Products

European Commission

Regulation on Ecodesign for Sustainable Products

**This is summary presentation and does not represent the official views of the European Commission*

CEAP - Changing the way Europe consumes and produces



35 actions

Make sustainable products the norm in the EU
Empower consumers and public buyers
Sustainable production processes

Electronics and ICT
Batteries and vehicles
Packaging
Plastics
Textiles
Construction and buildings
Food, water and nutrients

Reduce Waste
Reduce Waste Exports
Boost market for high quality and safe secondary raw materials

Making circular economy work for people, regions and cities

Circular economy as a requisite for climate neutrality

Getting the Economics Right

Financial Markets

Investments and R&I

Global Level Playing Field

Monitoring

European Commission

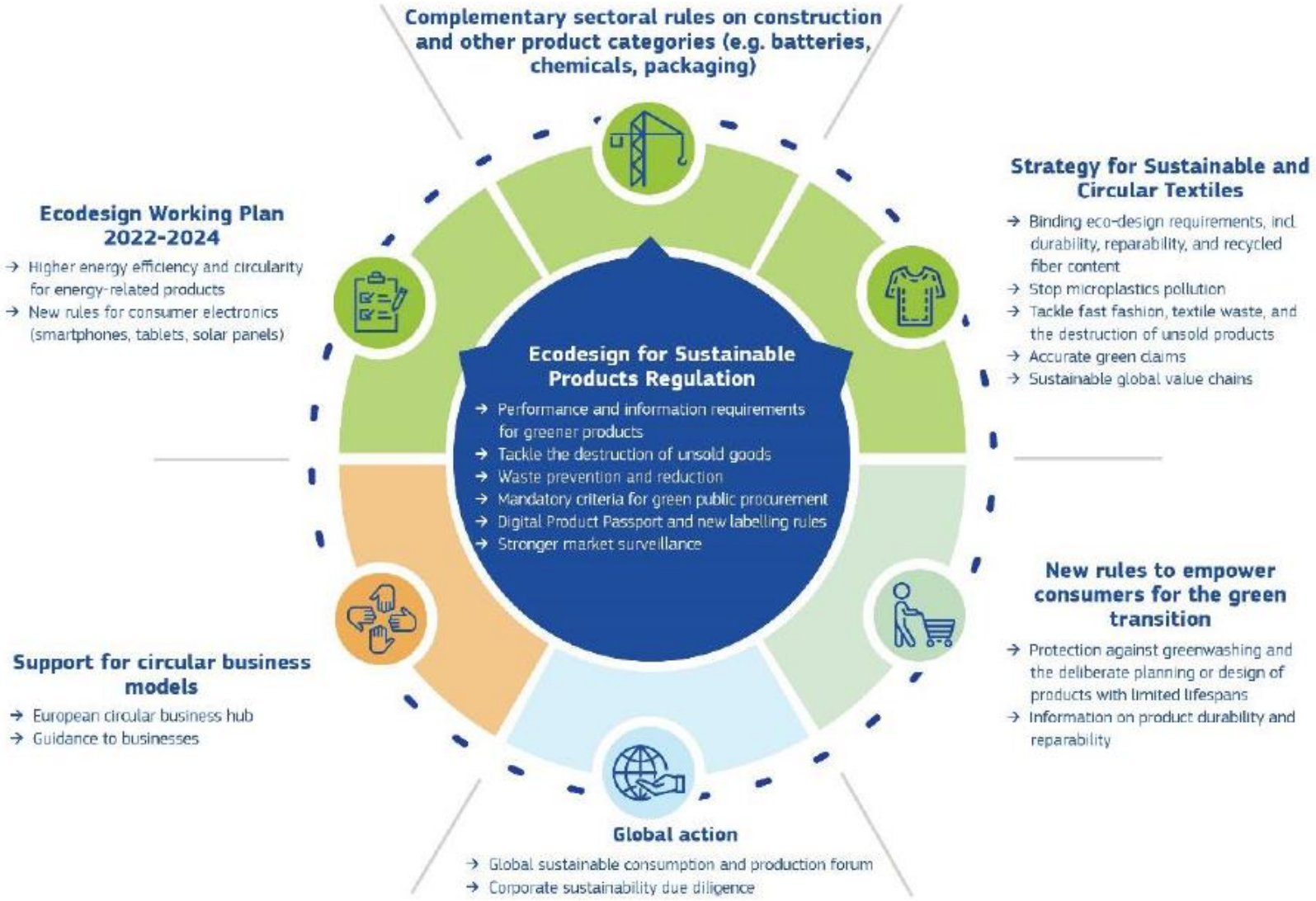
*“It's time to **end the model of ‘take, make, break, and throw away' that is so harmful to our planet, our health and our economy**. Today's proposals will ensure that **only the most sustainable products are sold in Europe**. They allow consumers to **save energy, repair and not replace broken products**, and make **smart environmental choices** when they are shopping for new ones.”*

***Frans Timmermans**,*
Executive Vice-President for the European Green Deal

European Commission

The Circular Economy package – 30 March 2022

Making sustainable products the norm in a more resilient Single Market

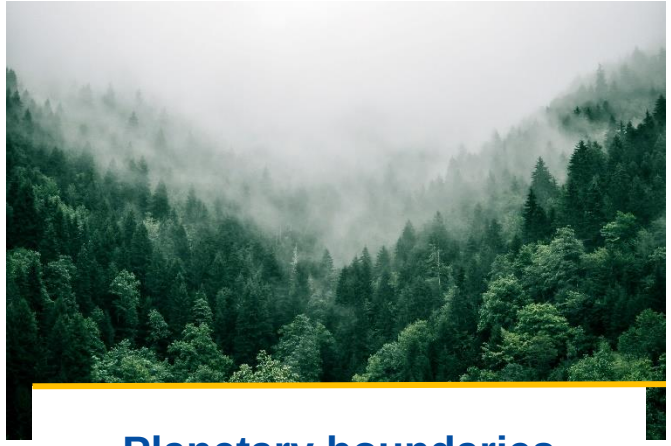


European Commission

Why is ESPR needed?

Inefficient use of resources

- **Global extraction of materials tripled** since 1970
- Over **90% of biodiversity loss and water stress** from resource extraction and processing
- **Waste generation** set to increase **70%** by 2050
- High **strategic** and **material dependency**



Planetary boundaries exceeded

- EU has less than 10% of world population, yet its **consumption-based impacts are close to or exceed boundaries** for climate change, particulate matter, land use and mineral resources (Sala et al, 2020)

New business opportunities

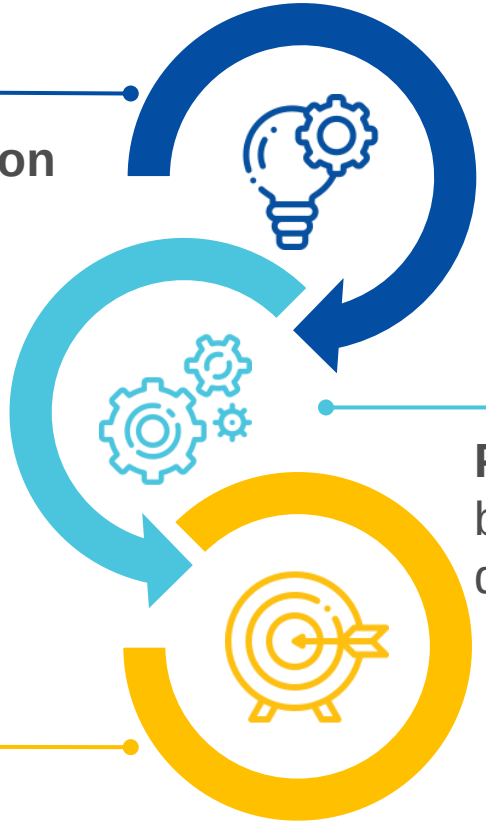
- **Better functioning** of the **Single Market**
- **Reduce material use** and **expenditure**
- **Level playing field**

European Commission

How will ESPR work?

1. Building on the existing Ecodesign Directive

Key features of Ecodesign Directive approach maintained



Framework legislation

Product-specific measures based on detailed impact assessment

Regularly updated **multiannual working plans** setting out priorities

European Commission

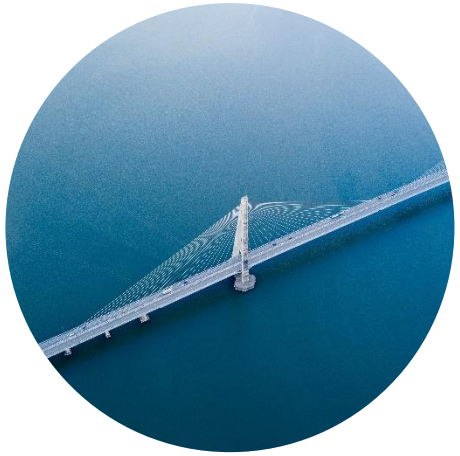
How will ESPR work?
2. Extending the Ecodesign approach

Scope extension

Moving beyond energy-related products to a wide product scope

New requirements

Plus clarification of existing requirements



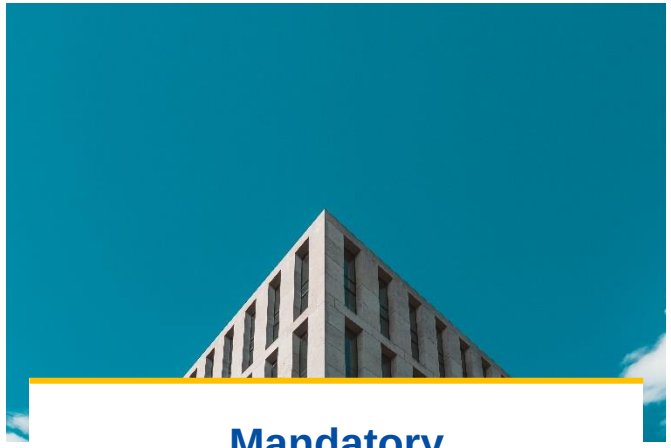
Horizontal approach

Now allowed for in addition to product-specific requirements

Increased focus on product information

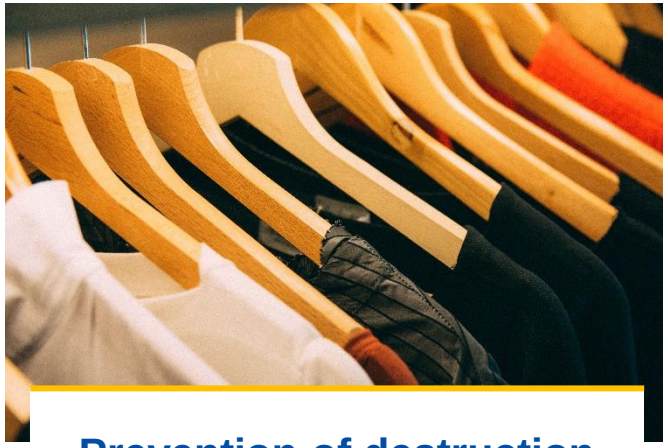
e.g. Digital Product Passport; labels

Other tools provided by ESPR



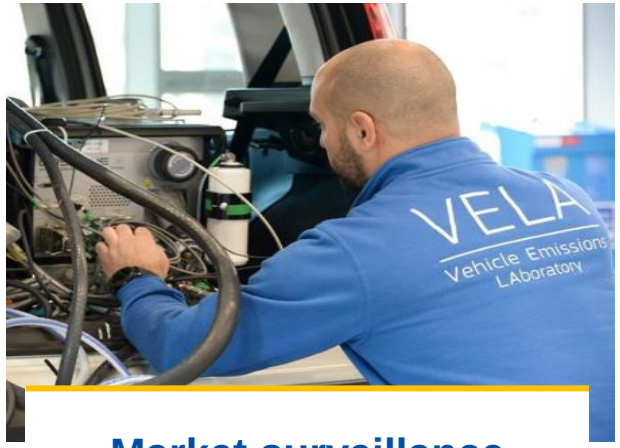
Mandatory Green Public Procurement

ESPR will enable mandatory GPP criteria to be set in delegated acts for public contracting authorities



Prevention of destruction of unsold consumer goods

Transparency requirements for those choosing to discard unsold goods, and possibility to ban their destruction for relevant product groups.



Market surveillance and customs controls

Reinforcing controls on regulated products, including market surveillance implementing plans,
possible targets on checks, support to common projects and investments

Key product aspects under ESPR

- Durability
- Reliability
- Reusability
- Upgradability
- Repairability
- Possibility of maintenance and refurbishment
- Presence of substances of concern
- Energy use or energy efficiency
- Resource use or resource efficiency
- Recycled content
- Possibility of remanufacturing and recycling
- Possibility of recovery of materials
- Environmental impacts, including carbon and environmental footprint
- Expected generation of waste materials

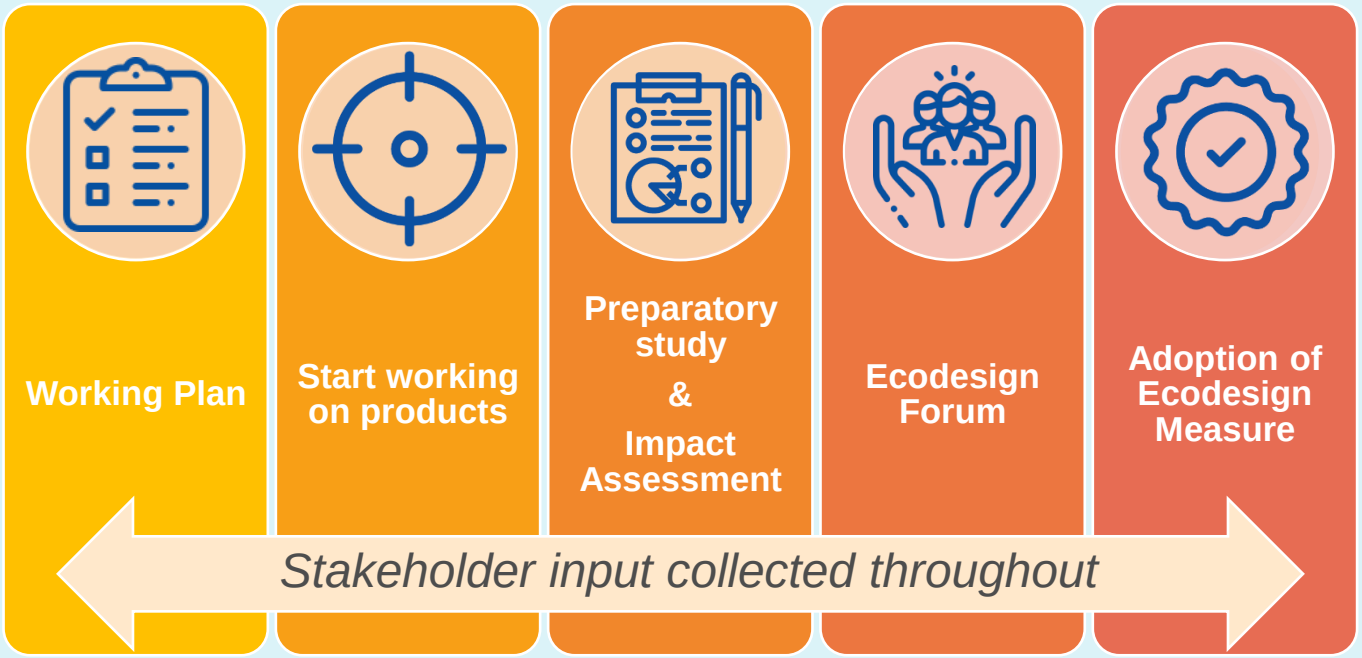
European Commission

How will ESPR work?
3. **Process**

ESPR = framework legislation

i.e. does not set specific measures. Rather, it enables their later adoption

Improved process for adoption of new Ecodesign measures



Digital Product Passport (DPP)

- Structured **collection of product data** with agreed ownership and access rights conveyed through **unique identifier**
- **Decentralised system**
- **Data** on sustainability, environmental impact, circularity, substances of concern, value retention for reuse/remanufacturing/recycling

European Commission

The DPP business case

- Track **raw material extraction/production** supporting due diligence efforts

- Track the life story of a product, enabling new business models related to its **remanufacturing, reparability, re-use/re-sale/second-life, recyclability, new business models**

- Support **market surveillance and customs authorities** with necessary checks

- Enable **manufacturers** to create product **digital twins,** embedding all the information required

- Provide **public authorities and policy makers** with reliable information, enabling links between **incentives** and **sustainability performance**

- Allows **citizens** to have access to **relevant and verified information** to buy or use/maintain products (e.g. using a smartphone)

European Commission

Expected outcomes of ESPR

Environment

- Help achieve EU's environmental goals and SDGs
- Target product-related environmental impacts

Consumers

- Improved product performance and longer lifetimes
- More informed decision making
- Financial savings (longer life and less energy)

Supply chain actors

- Reduced material costs
- Reputational benefits
- Increased transparency across supply chain

EU Economy

- Decoupling economy from resource use
- Reduced dependencies
- Increased resilience to external shocks

European Commission

Existing instruments for circularity of furniture

- **Eu Ecolabel criteria**
- **EU GPP criteria**
- **Product/Organisation Environmental Footprint methods**
  - **PEFCRs relevant for furniture: Decorative paints, leather,**

Thank you!

https://ec.europa.eu/commission/presscorner/detail/en/ip_22_2013

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Afternoon session: The furniture industry in the twin (green and digital) transitions & overall needs of the industry to remain competitive at global level

13:55 – 14:35

9. Panel discussion: European furniture industry reactions to the Commission proposals, national associations initiatives in support of companies & best practices

Robin Ljungar

Environmental Manager at TMF (Sweden)

Kees Hoogendijk

Director General at CBM (Netherlands)

Cathy Dufour

Director General l'Ameublement Français (France)

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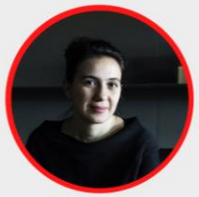
Afternoon session: The furniture industry in the twin (green and digital) transitions & overall needs of the industry to remain competitive at global level

14:35 – 15:20

10. Panel discussion: What does the European furniture industry need from policymakers to stay competitive at global level?

Philippe Moreau
L'Ameublement Français President (France)



Maria Porro
Assarredo President (Italy)

Jan Desmet
Fedustria President (Belgium)

Patrizia Toia
MEP, ITRE Committee, S&D

Chris de Roock
General Manager at WOOD.BE

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Afternoon session: The furniture industry in the twin (green and digital) transitions & overall needs of the industry to remain competitive at global level

15:20 – 15:25

11. Closing remarks & thank you

Edi Snaidero

EFIC President

EFIC
European Furniture Industries Confederation

Afternoon session: The furniture industry in the twin (green and digital) transitions & overall needs of the industry to remain competitive at global level

15:25 – 15:30

12. Wrap up

Mariam Zaidi

Moderator

THE FURNITURE DAY 2022

19 May 2022

EFIC
European Furniture Industries Confederation

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