PRESS

FEDERLEGNOARREDO, THE SECTOR CLOSED 2025 1.4% UP, FOR A 52.5 BILLION TURNOVER. ITALY IS DRIVING GROWTH, WHILE EXPORTS ARE CHANGING GEOGRAPHICALLY: USA AND FRANCE SLOWED

Feltrin: “Industrial and export support policies are needed to diversify and consolidate results. The Salone del Mobile is a strategic event for companies of all sizes: it is the place where companies can achieve maximum results with minimal effort, through direct engagement with the market. No other physical, digital, or showroom alternative is capable of offering the same concentration of opportunities and visibility.”

The wood-furnishing sector closed 2025 with **production revenue in excess of 52.2 billion** euros, marking a **1.4% increase compared to 2024** and confirming a period of stabilisation following the slowdown of the previous two years. The sector currently comprises **over 62,000 companies** and more than **292,000 employees**, accounting for **4.3% of Italy's national manufacturing output, 14.5% of companies, and 7.6% of employees, with a GDP contribution of 2.3%.**

CARD FATTURATO ADDETTI, IMPRESE, MANIFATTURA/ EMPLOYEE, COMPANY, MANUFACTURING TURNOVER CARD

The **domestic market** was largely responsible for growth in 2025, accounting for almost **33 billion** euros (+2%), thanks to the resilience of the residential sector and greater dynamism in the non-residential sector, despite the steady decline of housing-related tax incentives.
Exports remained substantially stable (+0.4%) accounting over 19.3 billion euros. In a complex international context marked by uneven trends in both mature markets and new destinations, the picture that emerges from the final figures drawn up by the FederlegnoArredo Study Centre is that of **an overall resilient supply chain**, with a certain domestic market solidity.

FederlegnoArredo

SEDE LEGALE
Foro Buonaparte, 65
20121 • Milano

Tel +39 02 8060 41
press@federlegnoarredo.it

C.F. 97228150153
federlegnoarredo.it

CARTA FILIERA LEGNO ARREDO/WOOD FURNITURE SUPPLY CHAIN CARD

Claudio Feltrin, President of Federlegno Arredo, had this to say: *"2025 therefore marked a return to growth for our supply chain, but it is very likely that this will be a fragile, transitory equilibrium. Given such a complex economic and geopolitical context, subject to sudden changes of scenario, that basically render any long-term forecast or reasoning pointless. It is also worth noting that the overall positive trend in the supply chain is largely bolstered by the domestic market, which therefore seems to have been less affected than predicted by the cessation of construction-related tax incentives. However,* ***exports showed signs of slowing in traditional markets****, starting with the* ***United States (2 billion)*** *and* ***France (2.9 billion)****, which closed 2025 down 3.9% and 1.5% respectively. The* ***United States,*** *which accounted for* ***almost 75% of*** *the sector's* ***exports*** *to the continent, accounting for 10.7% of the total, powerfully influenced the overall performance of the area."*

On the export front, **Europe was the leading trade outlet, accounting for over 66% of the total.** While maintaining its **Top Ten lead**, **France** was slightly down after years of strong growth; **Germany** (**1.9 billion**) showed signs of recovery, particularly during the second half of the year, allowing it to **close 2025 2% up**. **Spain** maintained its positive trend (**864 million**), up 1.7%, overtaking **Switzerlan**d (860 million) in the Top Ten, while **outside the EU**, the **United Kingdom** (**1.3 billion**) saw sustained growth of **+3.7%.** Thanks to its positive results for 2025 the **United Arab Emirates**, (**497 million**) saw **5.8%** growth, moving into seventh place, unlike **China which dropped 5.9% to 465 million**. Finally, Austria and the Netherlands completed the Top Ten, up **0.2%** and **7.1%**, respectively.
CARD TOP TEN/TOP TEN CARD

"As we can see, exports as a whole are currently holding up, albeit altering the supply chain's reference geography - historic markets such as France and the United States are slowing down, while Africa (+13.8%), the United Arab Emirates (+5.8%) and Canada (+6.9%) are growing. Meanwhile, an alarm bell from the US must be heeded: furniture exports in January 2026 were 28.5% down on January 2024. Equally, the EU saw imports from China increase by 1.3% while other non-EU countries, China excluded, fell by 1.6% altering market quotas. The coming months will show whether this is an exception or a trend, but in any case it is a ***clear signal of the need to diversify*** *our international presence more and more,* ***in a bid to grasp new opportunities*** *in less traditional markets.*

The issue of ***international competitiveness*** *therefore remains central; this calls for industrial and export support policies to diversify and consolidate the results that enable Made in Italy design to continue actively contributing to our country's trade balance. This transformation represents both a challenge and* *an opportunity: **The Salone del Mobile in April is therefore an even more strategic event for companies of all sizes**: it is the place where, **with minimal effort, maximum results can be achieved** through direct engagement with the market. There is no physical, digital, or showroom alternative capable of offering the same concentration of opportunities and visibility; nothing has the same power and potential."*

As regards the **Middle East area**, whether directly or indirectly affected by the war, it is worth noting that this particular area represents 7% of total supply chain exports, and at the end of 2025 was down 1.5% overall, despite the positive contribution of the United Arab Emirates and Israel, which, however, were insufficient to compensate for the decline in Saudi Arabia (-19.7%). These figures date from before the outbreak of the war that show that the area - excluding Saudi Arabia - grew by 3.3%.
CARD MEDIO ORIENTE/MIDDLE EAST CARD

Furniture macrosystem: stability thanks to the domestic market, exports slowed
The Furnishing Macrosystem closed 2025 with a turnover of over **27.7** billion euros (+**0.9%)**. The contribution of the Italian market (+2.7%) was decisive, amounting to 13.5 billion euros, while exports (**14.2** billion euros) recorded a slight decrease (-0.8%), affected by the difficulties in the main markets, the United States and France in particular. France, the top destination, closed the year down 1.6%, but it was the United States, the second largest market overall and the first non-European market, that suffered the most significant decline (down 4.9% for 83 million euros less than in 2024). Germany remained stable, in third place (-0.1%), while the United Kingdom, in fourth, saw 1.7% growth. However, the trade balance remained largely positive and growing, nudging almost 9 billion euros, confirming the strategic role of furnishing in the supply chain trade balance. There were just over 20,200 companies in 2025, with over 138,500 employees.
CARD MSA/MSA CARD

Bathroom and Kitchen Furniture
The Bathroom segment was distinguished by **2.1% growth**, reaching a turnover of just under **4.3 million euros.** The result was buoyed up by both the domestic market (+2%) and exports (+2.2%), which were on the up once more thanks mainly to European demand, with Germany seeing significant expansion.
CARD ARREDOBAGNO/BATHROOM FURNISHING CARD
The Kitchen segment also witnessed a positive trend, with **turnover exceeding 3 billion euros** (+1.5%) IN 2025. In this particular case, growth was driven exclusively by the **Italian market (+5**%), while exports contracted (-5%), affected in particular by the slowdown in the leading foreign markets, including France and the United States. CARD COMPARTO CUCINE/KITCHEN SEGMENT CARD

Overall, both segments showed that domestic demand continued to represent a key stability factor for the sector, in a still uncertain international context, but also confirmed the need to strengthen their positioning on the foreign markets to support growth in the medium term.

Wood macrosystem: Growth supported by prices, exports on the rise
The Wood Macrosystem (including the Wood Trade) recorded a **24.5** billion euro turnover (+1.9%), with growth mainly driven by the increase in prices rather than volumes, evidencing a still weak demand; exports evidenced a positive trend (+3.6%), but remained penalised by the strong increase in imports (+13.6%).
CARD MSL/WMS

AFRICA Focus
Africa accounted for over 600 million euros and was the continent with the highest growth percentage in 2025 (+13.8%), thanks to the contribution of several countries that were recording significant increases, although only Morocco exceeded the 100-million-euro export threshold. Of the regions, North Africa was the most significant, for a value in excess of 378 million euros and the best performing on the continent as a whole (+18.6%, compared to +6.5% for other African countries). The performances of Nigeria (+30.3%) and South Africa (+9.2%) were also particularly noteworthy.

ASIA Focus
Asia accounted for almost **3 billion euros** and represented 14.6% of Italian Wood-Furnishing exports. It was the second top continent in terms of export volume and all the key areas making it up – Middle East, Eastern Asia and Central Asia - evidenced a negative trend in 2025. The contraction was most marked in Eastern Asia (-6.8%), penalised above all by China's performance, but South Korea and Japan also witnessed contractions. The Middle East saw a more contained contraction (-1.5%) – the United Arab Emirates grew, but their positive trend failed to offset the fall in Saudi Arabia.
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FederlegnoArredo Press Office

Alessia Quiriconi
Tel. +39 347 4831339
alessia.quiriconi@federlegnoarredo.it
Chiara Sirianni
Tel. +39 338 5305071
chiara.sirianni@federlegnoarredo.it