PRESS

WOOD-FURNITURE SUPPLY CHAIN: 52.2 BILLION EURO TURNOVER, UP 1.3% ON '24.

EXPORTS STABLE: GERMANY PICKS UP, US STRUGGLES UNDER THE WEIGHT OF TARIFFS

Feltrin: "Monitoring the markets even when they are struggling is the right strategy for the stability of the sector.
We are calling for stricter controls on incoming goods that do not comply with the regulations. The competitiveness of the sector and consumer safety are at stake."

Despite a macroeconomic scenario still characterised by uncertainty, which is effectively a hidden duty weighing on our businesses, **the wood-furniture supply chain closed 2025 with a production turnover of €52.2 billion, recording a 1.3% growth compared to 2024**.

Contributing to this somewhat unexpected result was the performance of the **domestic market**, which managed to offset the gradual decrease in certain tax incentives linked to the redevelopment of real estate assets with a greater push from the non-residential sector, **growing by 1.8% to reach €32.9 billion**.

Exports remained stable (+0.4%) at 19.3 billion euros (37% of the total), although showing signs of weakness in some strategic markets such as France and the United States. On the other hand, Germany evidenced some signs of improvement and recovery.

This is a snapshot of the **2025 Preliminary Figures** drawn up by the Centro Studi FederlegnoArredo and presented at the press conference for the launch of the **Salone del Mobile.Milano** in April, an established key event for the entire supply chain.

Claudio Feltrin, President of FederlegnoArredo, had this to say: "*The data testify to how, despite grappling with an articulated, complex and uncertain context, our supply chain and the entire industrial system we represent has managed to put in place adaptation and development strategies and actions that have translated into* ***substantial stability****. We certainly cannot say that we are*

FederlegnoArredo

SEDE LEGALE
Foro Buonaparte, 65
20121 • Milano

Tel +39 02 8060 41
press@federlegnoarredo.it

C.F. 97228150153
federlegnoarredo.it

experiencing a structural recovery and that we can feel safe from the turbulence that already has us in its grip in 2026, but I am keen to detect some encouraging signs, which we have a duty to focus on, in support of our companies, and also as a Federation."

The **furnishing macrosystem** notched up a **production turnover of 27.7 billion euros in 2025, substantially stable (+0.6%) compared with 2024**. Growth in production destined for the domestic market **(13.5 billion, +2.1%)** offset the slight dip in exports **(14.2 billion, -0.8%)**, which still represented over half of the total value.

The wood macro-system (including the wood trade) **grew by 2%** for a turnover of **24.5 billion euros. However, this figure was partly determined by price trends and a recovery in exports (5.2 billion, +3.8%)**. The domestic market (**19.3 billion**) rose 1.5%.

EXPORTS

"*As regards the foreign markets, based on the data updated to October '25, our Study Centre pointed to a* ***substantially stable overall trend, for an estimated value of 19.3 billion euros*** *(+0.4%), confirming the strategic weight of exports on the results of the sector.*
Of particular interest in the Top 10, Germany *showed positive signs in the first ten months of 2025 (**1.7 billion; +1%**), while **France** remained weak (**2.5 billion; -1.3%),** after a two year period of strong expansion in '21-'22, slowing despite showing slight recovery in the final months.* ***The United States recorded a 2.5% fall (1.7 billion)****, after rebounding in 2024, its monthly trend influenced by the anticipation of purchases in the spring months in view of tariffs; reabsorbed in July (when the cumulative percentage change was still positive +0.3%), while exports slowed sharply in the following months, particularly in August and October*," added Mr Feltrin.

On the other hand, positive trends emerged in some European and non-European markets, helping to partially offset the decline in traditional destinations. The countries with the best performance in terms of export value increase included the **United Kingdom (+4.2%), the Netherlands (+8.5%) and Spain (+2.3%)**, which ranked fifth in the Top 10 destination markets, overtaking Switzerland. Markets such as the **United Arab Emirates (+3.9%)** also grew, confirming a progressive geographical diversification of foreign sales.

"*Overall, the picture that emerges is that exports continued to play a central role in the supply chain, but that companies need to be more adaptable, carrying out market monitoring and* ***diversifying*** *in* *an international scenario characterised by high volatility. Within this context, I believe that our companies were able to give of their best, managing to maintain their* ***presence even in those markets experiencing momentary difficulty****, without ever abandoning them, and* ***immediately seizing on the signs of recovery****, as was the case in the* ***German and British*** *markets.*

I would venture to say that we have done well as regards diversification, and that monitoring more critical junctures has proved to be a winning approach.

All the more reason ***for the Salone del Mobile.Milano to confirm its mission as a strategic platform for the international positioning of the supply chain****, a privileged meeting place for buyers, professionals and designers from all over the world, and* ***strengthening the presence of Italian companies on the global markets****, offering them a concrete opportunity to consolidate their positioning, intercept new interlocutors and present themselves to emerging markets*."

Meanwhile, China continued to make great strides, gaining market share both in Italy and in Europe. "Suffice it to say, that as far as the furniture macrosystem is concerned, after strong growth during the second half of 2024, the first ten months of 2025 confirmed the same trend: +3.7% in Europe, -0.3% in Italy. On the other hand, total imports dropped 7.7%, to the benefit of China's quota, which progressively strengthened its competitive position on the European market, against a background of growing pressure on Italian exports."

It is precisely this aspect that Mr Feltrin returned to, with a call for "greater controls to be carried out on goods entering our market, in order to avoid unfair competition from countries that produce goods without respecting the regulations to which European producers are subject. I should like to throw down a challenge: instead of thinking only about tariffs, let's start thinking about strict controls for incoming materials and goods: verifying only 1% of the flow is certainly not a sufficient barrier for protecting us from those who do not have to present certifications, have no sustainability regulations to follow and who do not excel when it comes to consumer safety. So it will always be an unequal fight."

PRESS

KITCHENS

In 2025, the kitchen sector recorded a production turnover of 3 billion euros, substantially in line with 2024 (+0.5%), confirming a picture of overall stability following the three-year period of strong growth that characterised the post-pandemic period.

Production destined for the Italian market grew by +3.4% (2 billion); while exports (1 billion), on the other hand, saw a 5% decline, following years of particularly sustained expansion. The slowdown in exports affected some key markets in particular, including the United States and France, while more dynamic signals emerged from countries such as the United Arab Emirates and Spain.

BATHROOM FURNITURE

In 2025, the bathroom furniture sector recorded **a production turnover of €4.3 billion, up +1.5% on 2024**, confirming its overall resilience.

The positive trend was mainly supported by the domestic market, which grew by 2.2%, with exports remaining essentially stable (+0.5%), nudging almost €1.7 billion, with exports accounting for around 40% of the total value. There were signs of recovery in Germany, the leading destination country.

Milan, 29th January 2026

Press Office FederlegnoArredo

Alessia Quiriconi
Tel. 347 4831339
alessia.quiriconi@federlegnoarredo.it

Chiara Sirianni
Tel. 338 5305071
chiara.sirianni@federlegnoarredo.it