

2020

Italy in 10 selfies

An economy on a human scale against the climate crisis

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SYMBOLA

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UNIONCAMERE



Associazione delle Camere
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Italiane all'Estero

WE THANK

Aaster, Aiccon, Coldiretti, Conai, Confartigianato, CNA, Cresme, Ecopneus, Enel, Farindustria, FederlegnoArredo, Federparchi, Fondazione Cariplo, Fondazione Edison, Fondazione Fitzcarraldo, Gruppo Saviola, Ima group, Intesa Sanpaolo, Legambiente, Novamont, Ucima.

*“There is a tide in the affairs of men Which, taken at the flood, leads on to fortune;
Omitted, all the voyage of their life Is bound in shallows and in miseries.
On such a full sea are we now afloat”
William Shakespeare, Julius Caesar*

The climate crisis challenges us to a necessary and ambitious common effort. It urges us to shelter the world from the catastrophes that the rising global temperatures have dramatically triggered. Yet it also offers us a great opportunity: to make the Planet a better place, our economy and our society more sustainable, more people-friendly and therefore more forward-looking. Italy in 10 selfies is also about that: bringing together some of the country's strengths, not very well known but to be proud of (and others could be added). Symbola shows “how many partitions Italy has”, the strongest forces on which to focus in order to mobilise the country and zero the net GHG emission by 2050. From this point on, it is possible to face the long-standing woes of Italy: public debt, unequal distribution of wealth, unemployment, illegality, a suffocating bureaucracy and the backwardness of the South.

To rediscover that shared mission, essential to relaunch not just economically, Europe as a major player for the climate challenge and make it a privileged place for human hope.

The data reported in the following pages cover different sectors and fields: from industry to agriculture, from craft to services, from design to research that often hides in the creases of our pocket-sized SMEs and multinationals. The protagonists are many economic, social, institutional talents that Symbola records, narrates and connects through its initiatives, developed together with many travel companions.

An Italy that makes Italy, active on global markets thanks also to circular economy, green economy and culture, which combines competitiveness, environment, social cohesion, innovation and ancient traditions, empathy and new technologies, beauty, human capital and bond with the territory.

A country which, as the Assisi Manifesto states, can give an important contribution in the climate challenge together with Europe in trying to build a safer, more civilised, kinder world.

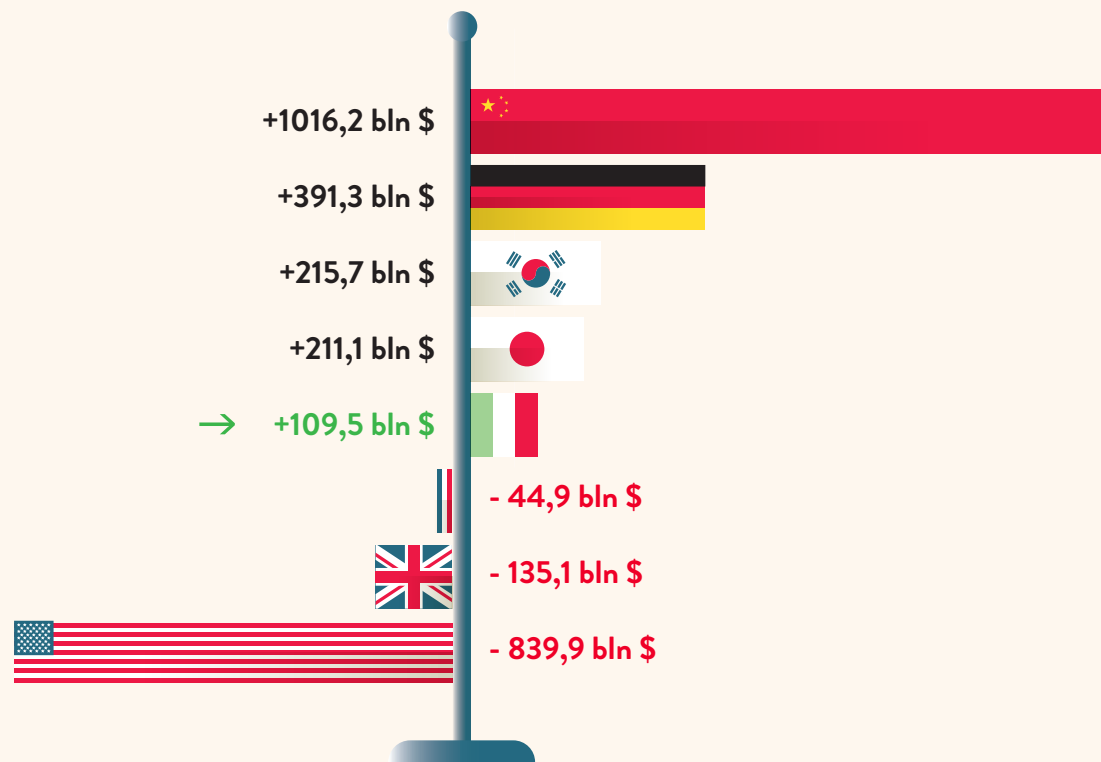
ERMETE REALACCI
Symbola Foundation Chairman

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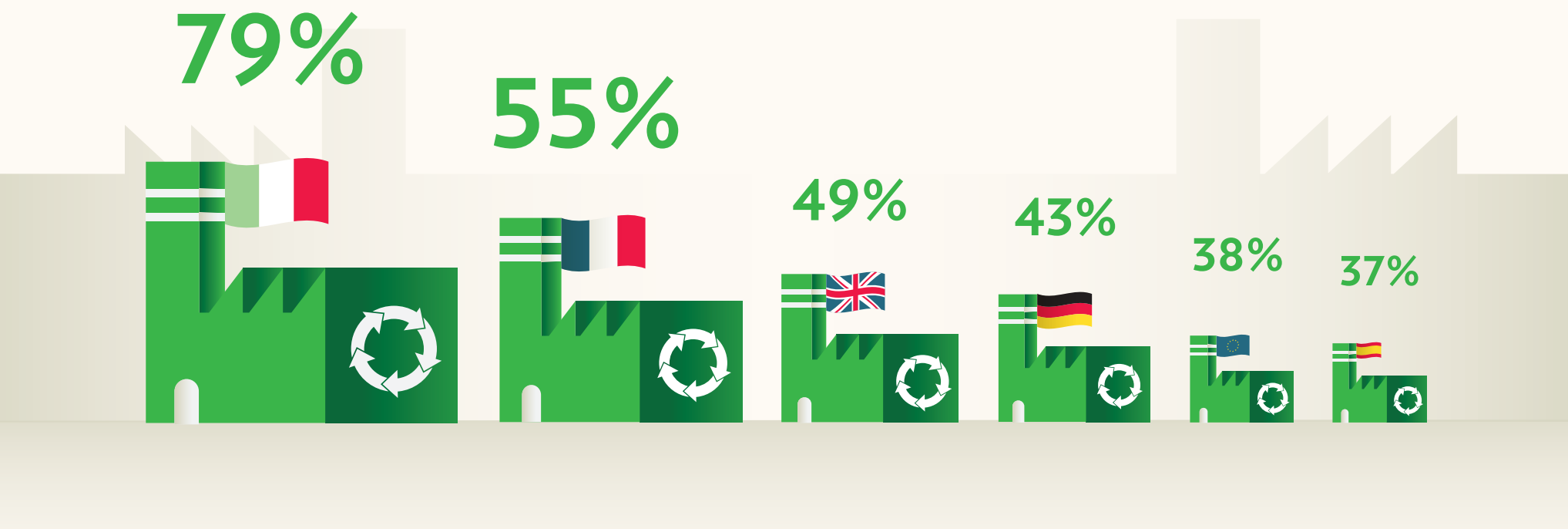


ITALY IS ONE OF THE **FIVE COUNTRIES IN THE WORLD** WITH A **MANUFACTURING SURPLUS** ABOVE \$100 BILLION

In 2018, with a foreign manufacturing trade surplus of \$109.5 billion in 2018, Italy confirms its leading role in the global industry. With 922 products out of 5206 surveyed in world trade (Fortis-Corradini Index 2017, last year available), Italy is first (240 products), second (380) or third (302) in the world for foreign trade balance.

01.

First G20 countries for trade surplus manufacturing, 2018 (billion dollars)
Symbola Foundation, Italy in 10 selfies, 2020

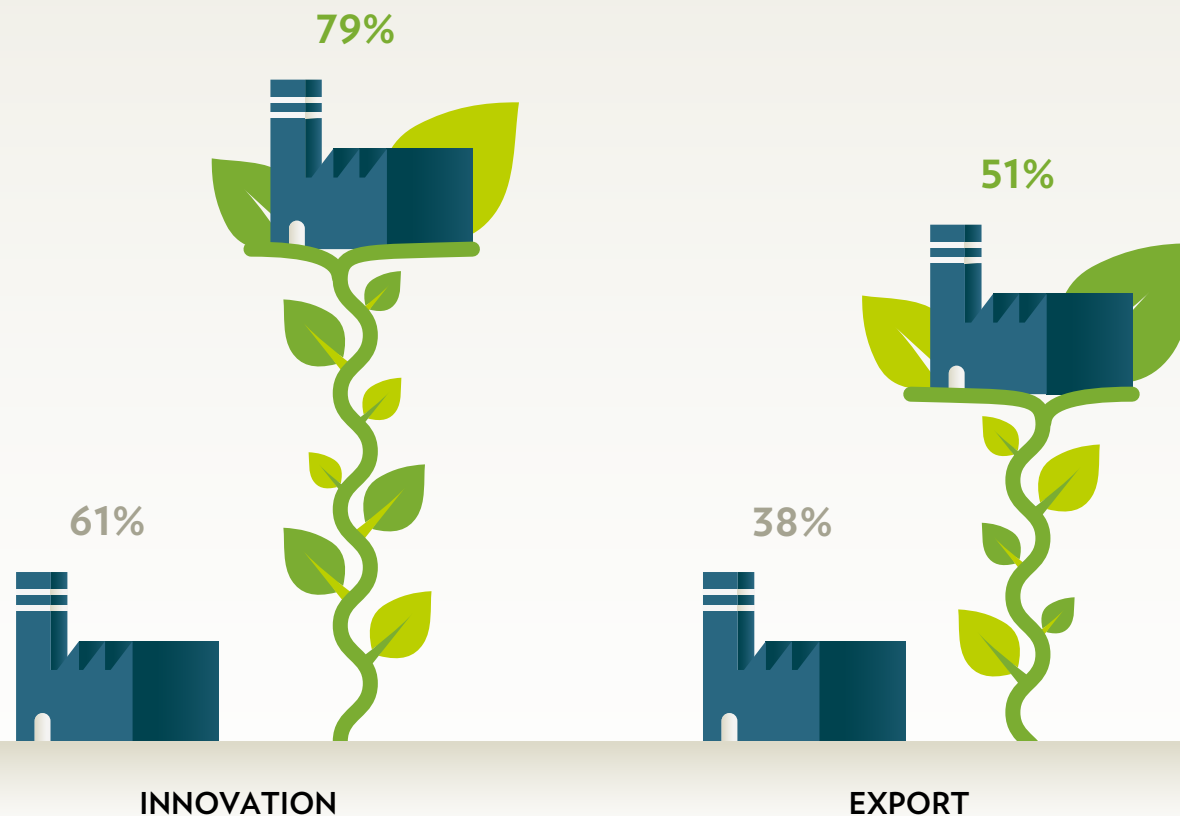


CHAMPIONS IN CIRCULAR ECONOMY AND EFFICIENCY

Italy is the European country with the highest waste recycling rate. With 79% of the total waste sent for recycling, the rate is more than twice as high as the European average (only the 38%) and well above all the other major European countries: France 55%, the United Kingdom 49%, Germany 43% and Spain 37%. The substitution of second raw material in the Italian economy results in annual savings of 21 million tonnes of oil equivalent and 58 million tonnes of CO₂. We are first among the major EU countries also for waste reduction: 43.2 tons per million euros produced. Spain produces 54.7, Great Britain 63.7, Germany 67.4, France 77.4 (EU average 89.1). In addition, for every kilogram of waste consumed, our country generates, with the same purchasing power, 3.5 euros of GDP, slightly less than Great Britain (3.7, which, however, has an economy driven by finance), better than the EU average (2.2) and Spain (3.1), France (2.7) and Germany (2.3).

02.

Recycling share of total waste, big EU, 2016, last available data (% values)

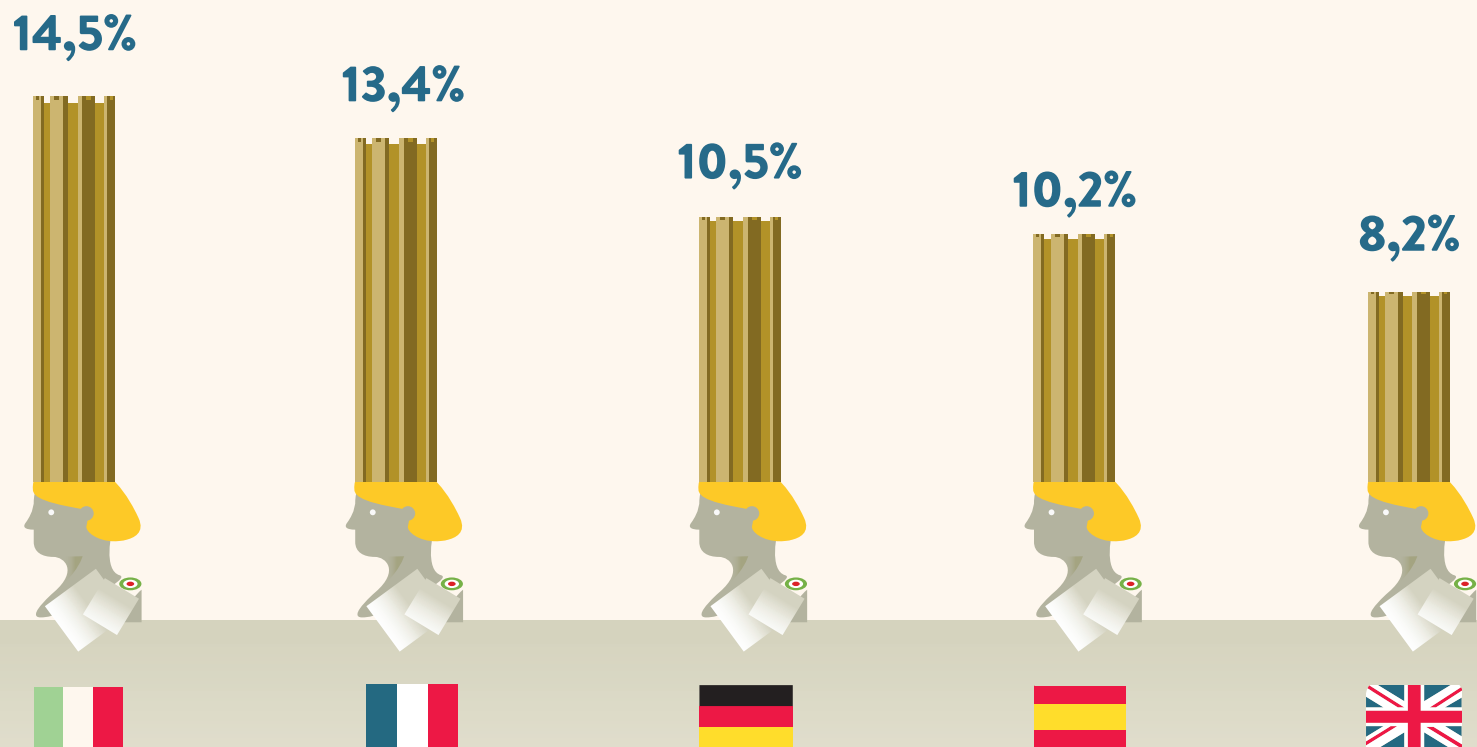


FROM **GREEN ECONOMY** MORE STRENGTH TO **ITALIAN COMPANIES**

During the last 5 years (2015-2019) more than 432,000 Italian companies operating in industry and services have invested in green products and technologies: almost a third (31.2%) of the total non-agricultural entrepreneurship and in manufacturing are 35.8%. Those who have chosen sustainability have a greater dynamism on foreign markets: in 2018, 51% of eco-investors reported an increase in exports, compared to 38% of the others. They also innovate more: 79% of green companies have developed innovations, versus 61% of non-investors. This innovation also looks at Impresa 4.0. Turnover (expected increase of 26% of green companies versus 18% of the others, 2019) and employment (19% versus 8%) benefit from exports and innovation. In 2018 the number of green jobs in Italy exceeded the threshold of 3 million: 3,100,000 units, 13.4% of total employment.

03.

Competitive advantages of manufacturing companies (5-499 workers) that have invested in the latest 5 years (2015-2019) in products and green technology, 2018 (% values)
Symbola Foundation, Italy in 10 selfies, 2020

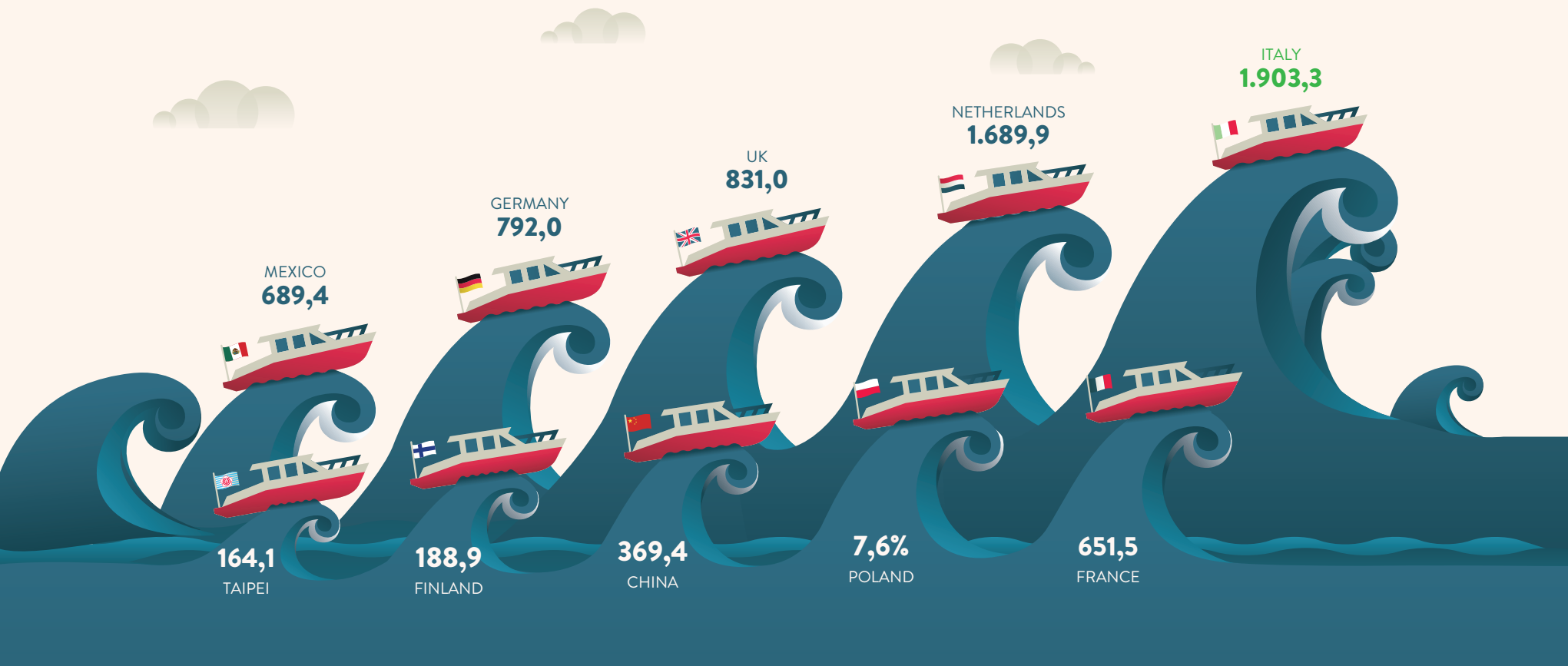


FIRST IN EUROPE BY NUMBER OF CULTURAL ENTERPRISES AND FIRST IN THE WORLD ALONG WITH CHINA FOR UNESCO SITES

14.5% of all European cultural enterprises speak Italian: the largest share on the continent, making Italy the leading country, ahead of France (13.4%), Germany (10.5%), Spain (10.2%) and Great Britain (8.2%). In Italy, the cultural and creative production system (made not only by companies but also public administration and non-profit organisations), generates almost 96 billion euros and activates other sectors of the economy, moving collectively 265.4 billion, equivalent to 16.9% of national added value. The cultural and creative production system alone provides work for 1.5 million people, 6.1% of total employment in Italy. Moreover, Italy is the country with the highest number of UNESCO World Heritage Sites: 55, same as China.

04.

National contribution to the European total of cultural enterprises, first EU countries, 2016 (% values)

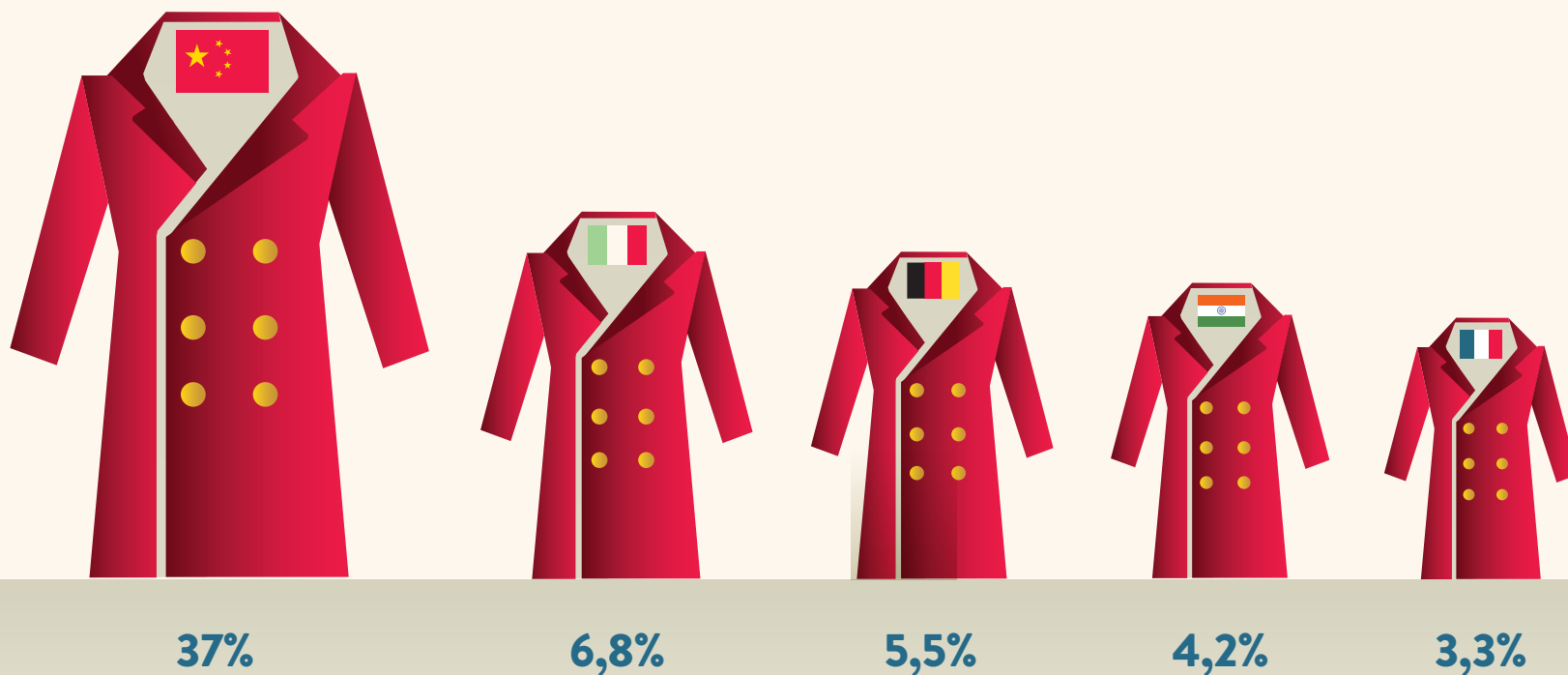


WORLD YACHTING SPEAKS ITALIAN

In yachting, Italy is unrivaled. We are the world leader in terms of trade balance, with just under two billion dollars (1.9), ahead of The Netherlands (1.7 billion), United Kingdom (831 million), Germany (792 million) and Mexico (689 million). Thanks to our technical and production expertise, design and innovation in the most efficient engines, we are the first country in the world in the production of superyachts (over 24 meters) with 268 boats under construction in 2019 on a total of 621 at global level.

05.

Yachting trade balance, top ten Countries in the world, 2018 (millions of dollars)



SECOND IN THE WORLD IN FASHION FOR MARKET SHARE

Italy is the second country in the world for market share in fashion (6.8%), after China (37%) and ahead of Germany (5.5%), India (4.2%) and France (3.3%).

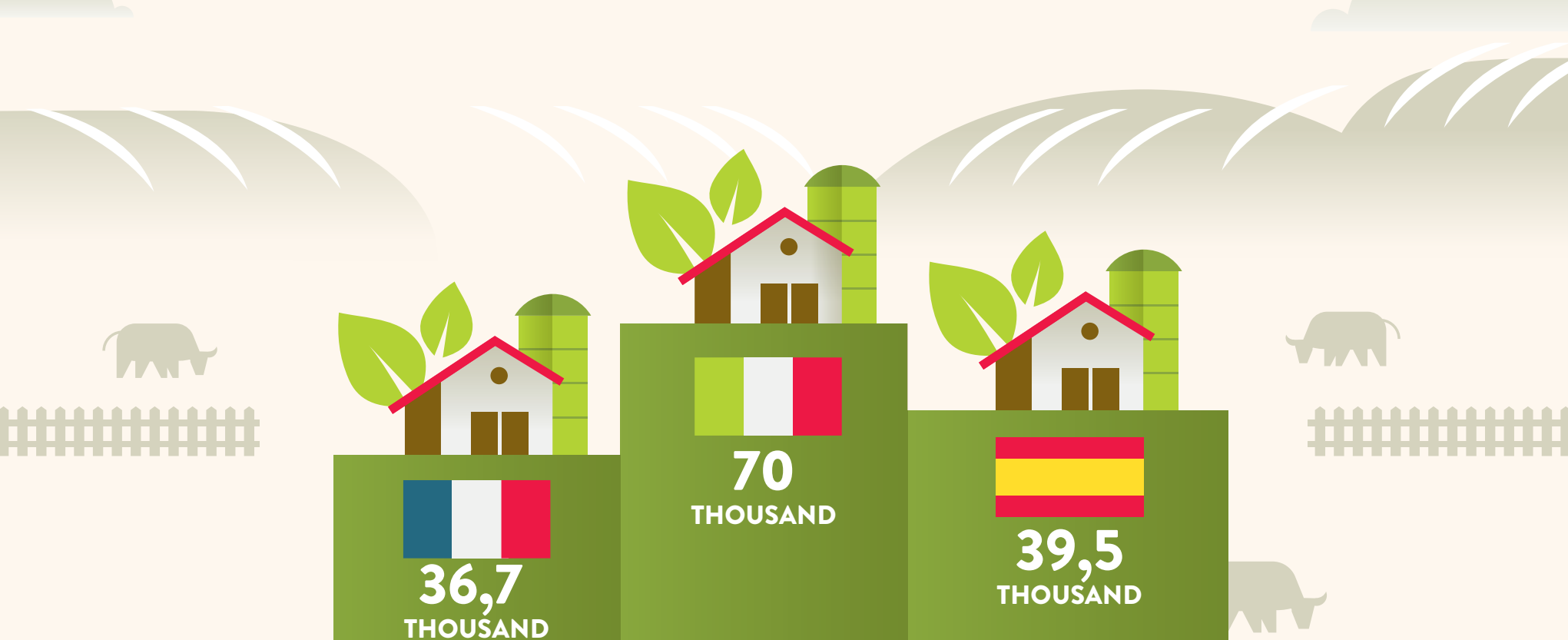
This is thanks to Italian creativity and style and also thanks to the environmental commitment of our companies: for example, out of the 80 companies worldwide that have joined Greenpeace's Detox campaign (for the elimination of toxic and polluting products in clothes), 58 are Italian.

Italy, behind Vietnam, is the second exporter of clothing to China with 17% of all Chinese imports, by far the first among the countries producing quality fashion (France is 19th with 2%).

Moreover, our country produces more than 1/3 of all the added value of the fashion sector in the EU28, and compared to the other European leaders it has been able to maintain the structure of the supply chain to a greater extent.

06.

Market shares of the fashion total, first Countries, 2018 (% values)

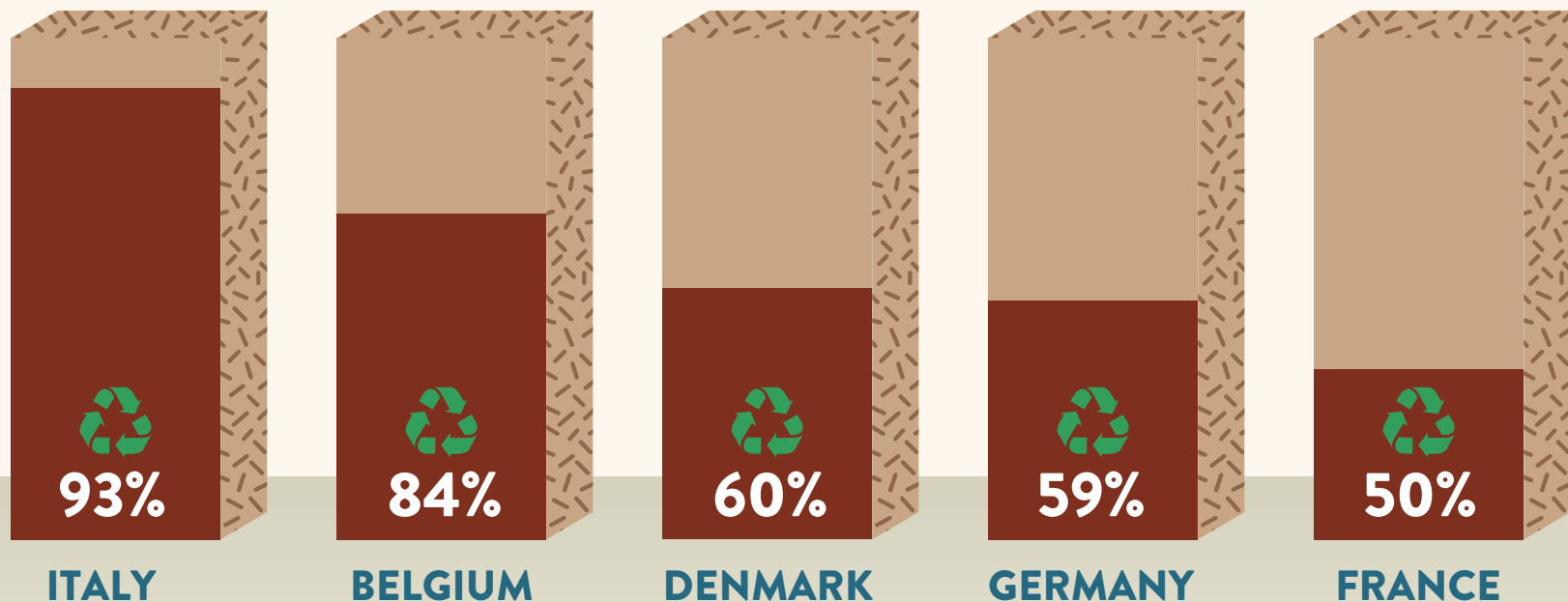


ITALIAN AGRICULTURE IS THE MOST SUSTAINABLE AND COMPETITIVE AGRICULTURE IN EUROPE

Italy confirms its position at the top of the world for agricultural areas cultivated with organic farming; 15.5% of the national utilised agricultural area (UAA), ahead of Spain (9.7%), France (7.5%), Germany (9.1%) and the United Kingdom (2.7%). We have no competition in Europe for the number of organic producers; about 70 thousand (2018), in Spain 39.5 thousand, in France 36.7 thousand, in Germany 32 thousand, in Greece 29.5 thousand. We are the country with the least chemical residues exceeding the legal limits in agri-food products: 0.8% of the total, versus 1.3% of the EU average and 5.5% of non-EU products. Italian agriculture emits about 50% less greenhouse gases than the EU28 average, and does much better than other large countries. We are the only country in the world that can boast 299 geographical indications recognized at EU level for food products (167 PDO, 130 PGI, 2 TSG). For this reason too, the added value of our agriculture is the highest among the major European countries.

07.

EU organic producers, first countries, 2018
(absolute value)



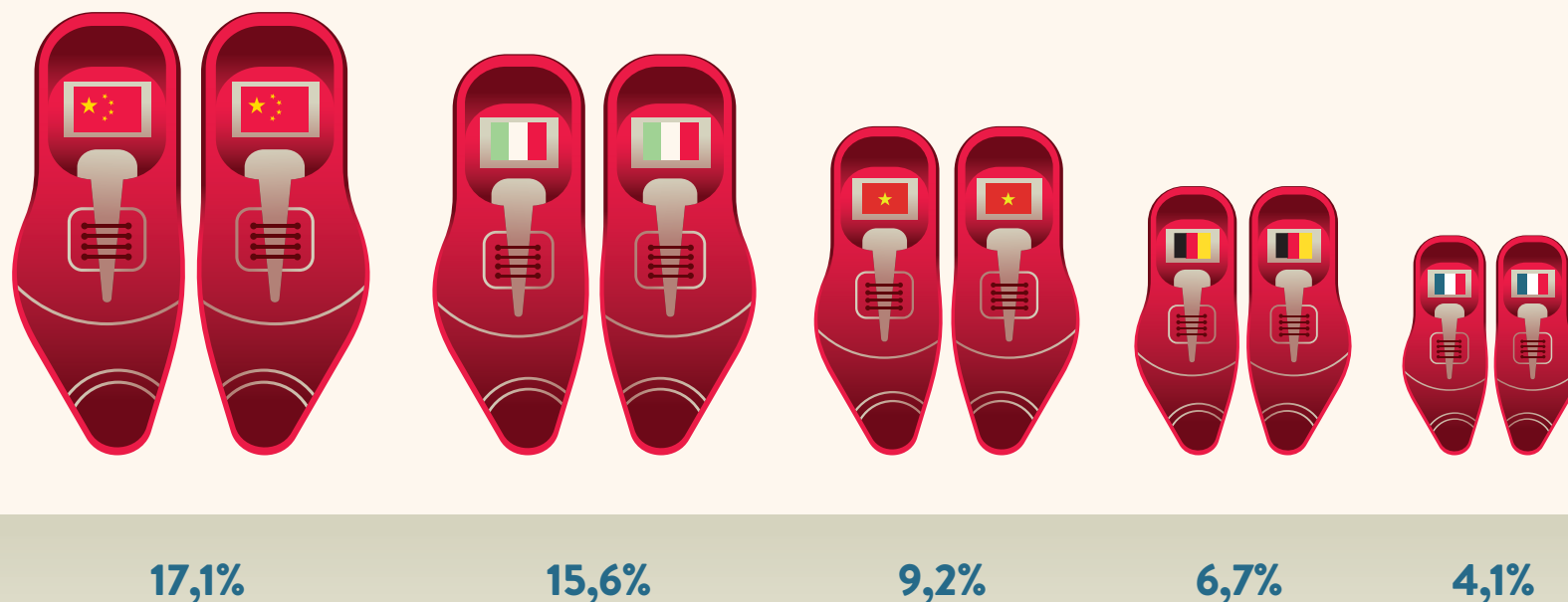
ITALIAN WOOD FURNITURE AHEAD IN CIRCULAR ECONOMY AND EXPORTS

The Italian wood furniture industry is first in Europe in circular economy: 93% of chipboard panels produced in Italy are made out of recycled wood. This is followed by Belgium with 84%, Denmark 60%, Germany 59%, France 50%. In addition, it produces fewer climate-altering emissions than other large EU countries: 26 kg per thousand euros of production, compared to 43 in Germany, 49 in France, 79 in the UK and over 200 in Spain.

Thanks to the know-how and design and thanks to the sustainable choices of Italian companies, Italy, with over 10 billion dollars (10.4), ranks third in the world for trade balance in wood furniture; only China (92.4 billion dollars) and Poland (11) have a higher balance, while the balance is negative for Germany (-3.1), UK (-7.7) and France (-7.8).

08.

Share of recycled chipboard panels on the total, first EU countries, 2018 (% values)

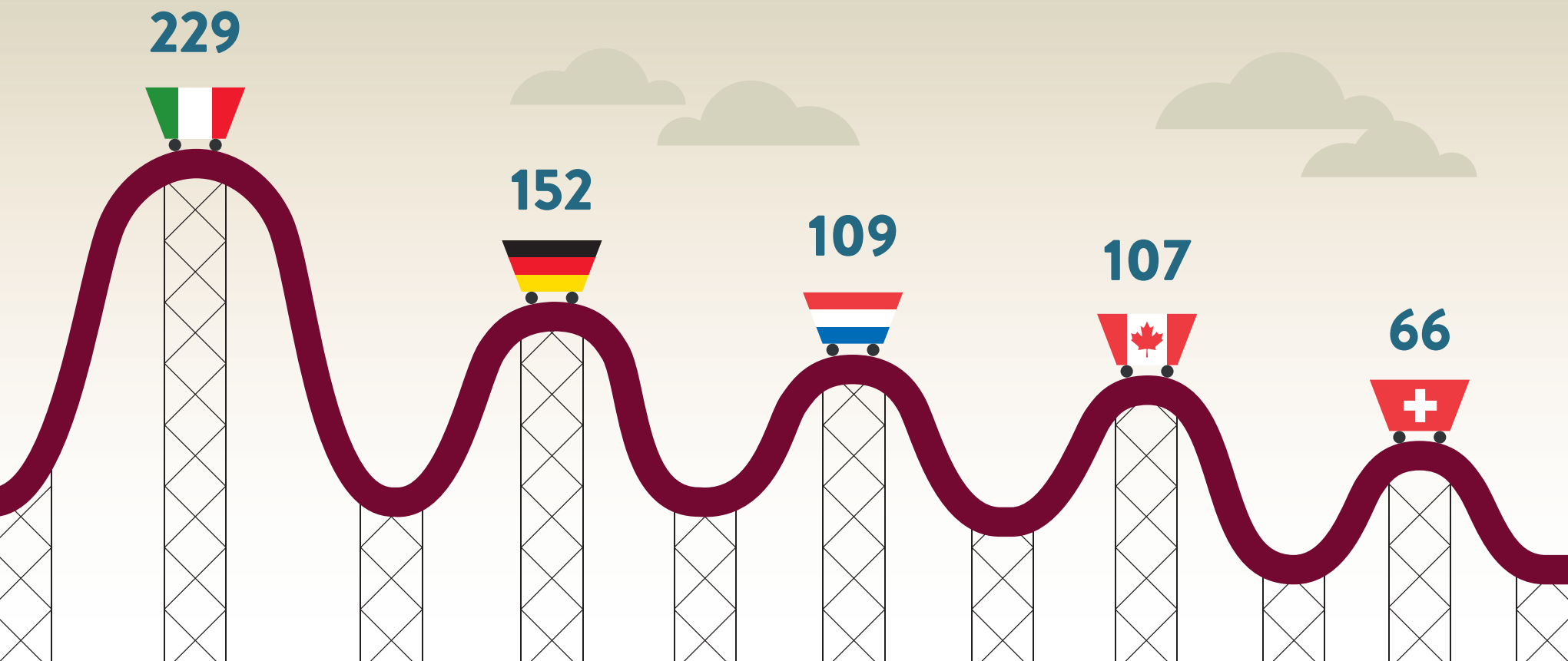


ITALY AMONG THE WORLD **LEADERS** IN **LEATHER FOOTWEAR**

Our country, accounting for 15.6% of all leather shoes sold in the world, ranks second in terms of shares, worth \$8.4 billion. Only China (17.1%) outperforms us. Followed by Vietnam (9.2%), Germany (6.7%) and France (4.1%). The work towards sustainability done by Italian tanneries (from the reduction of pollutants such as chromium, to waste recycling), in addition to design and craftsmanship, weighs in on this second place after the Chinese giant. If we then consider all types of shoes (therefore not just the premium range of those in leather) Italy ranks third after China and Vietnam.

09.

World market shares of leather shoes or with leather parts, first countries, 2018 (% values)



ITALIAN **CAROUSELS** ARE THE **BEST-SELLING IN THE WORLD** BECAUSE THEY ARE BEAUTIFUL AND THEY FOCUS ON THE **ENVIRONMENT**

The children of Coney Island and Singapore, Minsk and Pyonyang enjoy themselves on Italian rides. They are not the only ones, since our country has the largest trade balance in the world: 229 million dollars. Way ahead of Germany (152), Holland (109), Canada (107) and Switzerland (66). Beauty, creativity, ingenuity, technical skills, new technologies but also efficiency in energy consumption: these are the aces in the hole of national carnies.

10.

Trade balance of the carousels, first countries, 2018 (millions of dollars)



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SYMBOLA – FOUNDATION FOR ITALIAN QUALITY

Symbola - from ancient Greek, “to put together” - was born to bring together and promote a quality-oriented development model: a soft economy, in which tradition, territory, technological innovation and research merge, combining competitiveness and enhancement of human capital, economic development and environmental and human rights protection. A development model oriented towards sustainability based on the green economy, the role of culture and creativity, social cohesion and circular economy. Symbola - Foundation for Italian Quality - is a cultural movement that connects leading figures from the economic and business world, active citizenship, territorial and institutional realities, the world of culture and representatives. Symbola speaks to society, economy, institutions and politics also thanks to an intense activity of analysis and research. All the reports published - among the main GreenItaly, Io sono Cultura, Coesione è Competizione, I.T.A.L.I.A. Geographies of the new Made in Italy - can be read and downloaded free of charge on the website.

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