

2021

## Italy in 10 selfies

Facing the future with a human-scale economy

CREATED BY

# SYMBOLA

Fondazione per le qualità italiane

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UNDER THE PATRONAGE OF



**Ministero degli Affari Esteri  
e della Cooperazione Internazionale**



**MINISTERO DELLA  
TRANSIZIONE ECOLOGICA**

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IN COLLABORATION WITH



**UNIONCAMERE**



**ASSOCAMERESTERO**  
ASSOCIAZIONE DELLE CAMERE DI  
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*“Worse than this crisis is the tragedy of letting it go to waste”*

*Pope Francis*

*“There are more things in heaven and earth, Horatio, Than are dreamt of in your philosophy”*

*Shakespeare*

Tackling the COVID19 pandemic and the climate crisis is not only necessary but also - as the Assisi Manifesto states - represents a significant opportunity to make our economy and society more sustainable, healthier, and therefore more future-proof. It is a fundamental challenge that requires the best technological, institutional, political, social and cultural resources. It has to be taken forward without leaving anyone behind, without leaving anyone alone. Europe has accepted this challenge by mobilising significant assets around the themes of cohesion, green transition, digital economy, innovation and by committing to the goal of reducing CO<sub>2</sub> emissions to zero by 2050. This objective has also been embraced by Japan, South Korea and is about to be taken up by Joe Biden's America. China, on the other hand, has set a target for 2060.

Italy can play an essential role in this process, drawing on its strengths, which are often little known. Even for Italians, as recalled by Prime Minister Mario Draghi.

The data we show in these 'selfies' tell us about records in the circular economy, green economy, and design across all the Made in Italy industry. These records are hidden in the folds of the land. The main protagonists are sometimes pocket-sized multinationals, small and medium enterprises, and talents that Symbola records, narrates and connects through its initiatives, implemented together with many travelling companions. An Italy that makes Italy, active on international markets thanks to its ability to combine competitiveness, the environment and social cohesion, innovation and ancient traditions, empathy and technology, beauty, human capital and communities. A country that, together with Europe, can contribute significantly to “not wasting the crisis” and to building a safer, more civilised, friendlier world. To give new strength to hope in a difficult situation. Because as Gandhi put it, “life is not about waiting for the storm to pass but learning to dance in the rain”.

**ERMETE REALACCI**

*President of Symbola Foundation*

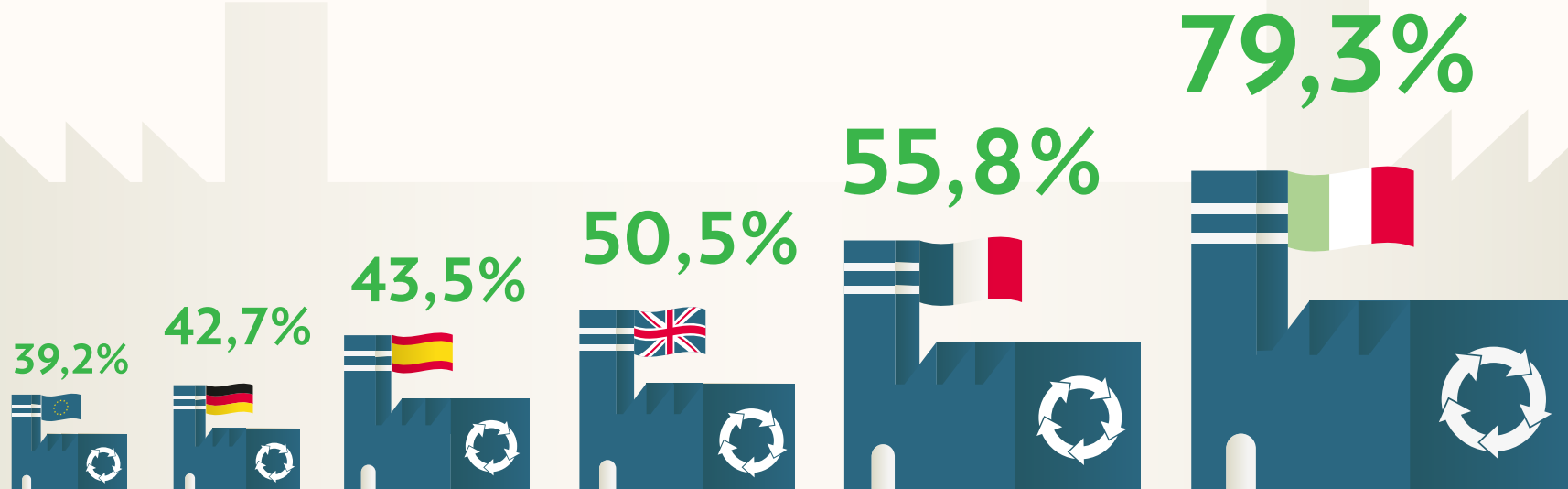
# 2021

## ITALY IN 10 SELFIES

Facing the future with a human-scale economy

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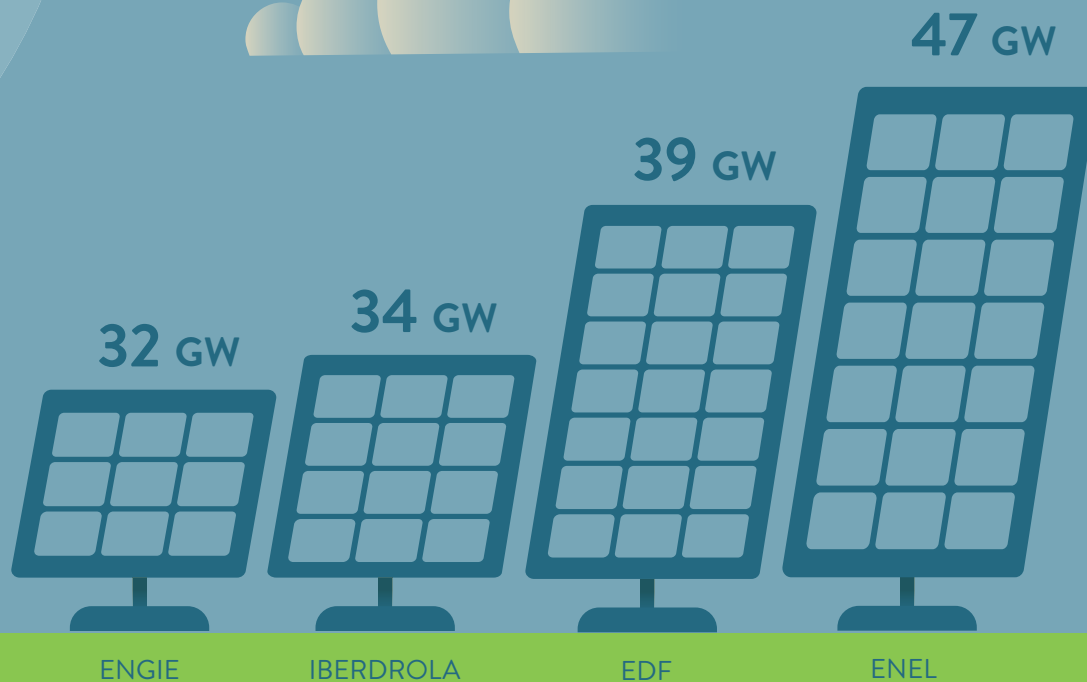


## EUROPEAN CHAMPIONS IN THE CIRCULAR ECONOMY

Italy is the European country with the highest recycling rate in total waste. At 79.3 % of waste sent for recycling, it accounts for almost twice the EU average (39.2%) and stands higher than the other major European countries: France (55.8%), the United Kingdom (50.5%), Spain (43.5%) and Germany (42.7%). The replacement of secondary raw material in the Italian economy results in an annual saving of 23 million tons of oil equivalent and 63 million tons of CO<sub>2</sub>. We also rank first among the major EU countries for waste reduction: 43.2 tonnes per million euros produced, while Spain has 48.7, Great Britain 60.8, Germany 59.5, France 74.7 (EU average 78.8).

01.

Recycling rate on total waste, big EU, 2018, latest available data (percentage value)

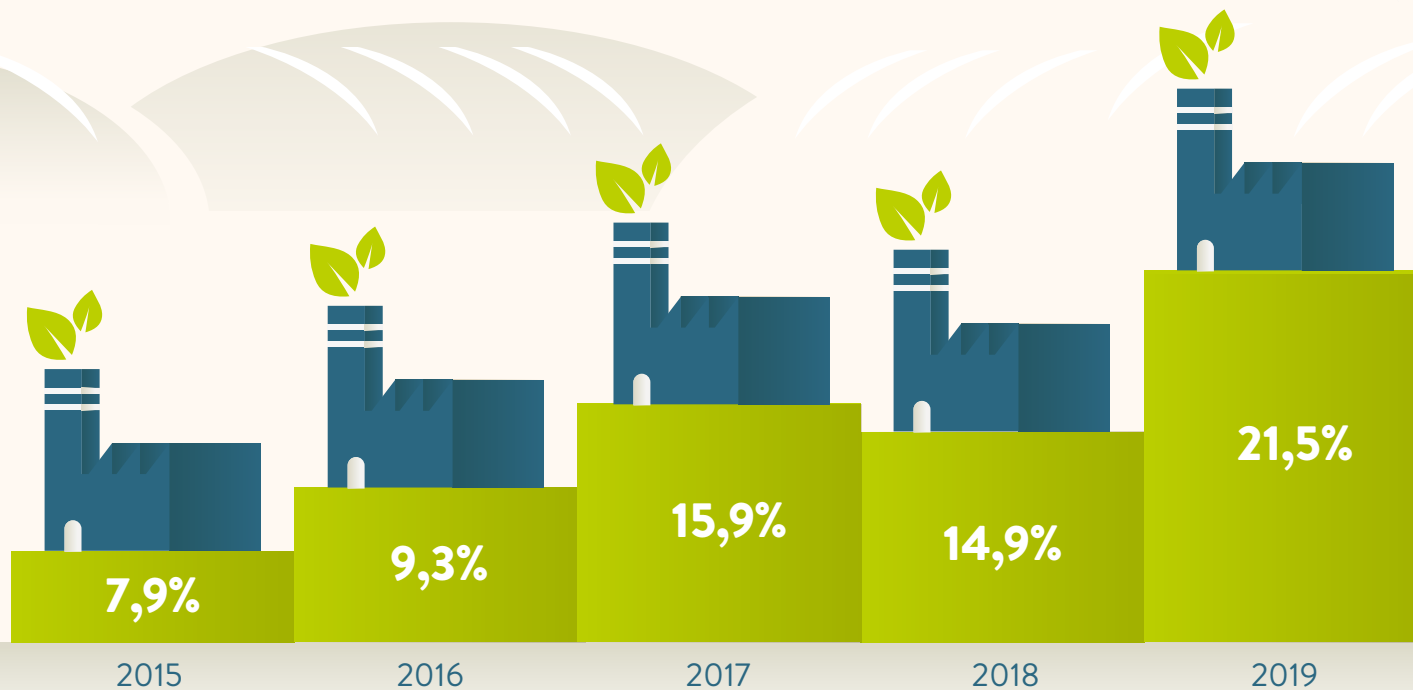


## THE LARGEST RENEWABLE ENERGY OPERATOR IS ITALIAN

Enel, with its subsidiary Green Power, is the world's largest private operator in the renewables sector with 47 GW of managed capacity as of the third quarter of 2020 (49 GW estimated at the end of 2020) from wind, solar, geothermal and hydroelectric plants located in Europe, the Americas, Africa, Asia and Oceania. Enel is the global leader in the ESG rating by Refinitiv in the "Electric Utilities and Independent Power Producers" sector and is the world leader in every sector according to Vigeo-Eiris, out of almost 5 thousand companies assessed based on sustainability performance. At the same time, in November 2020, it ranked first in the Dow Jones Sustainability World Index for the Electric Utilities sector. Due to these choices, it has recently reached a new record in market capitalisation, exceeding 90 billion euros in value, thus establishing itself as the leading company in the European utility sector.

02.

Managed capacity as of Q3 2020 (values in GigaWatts)

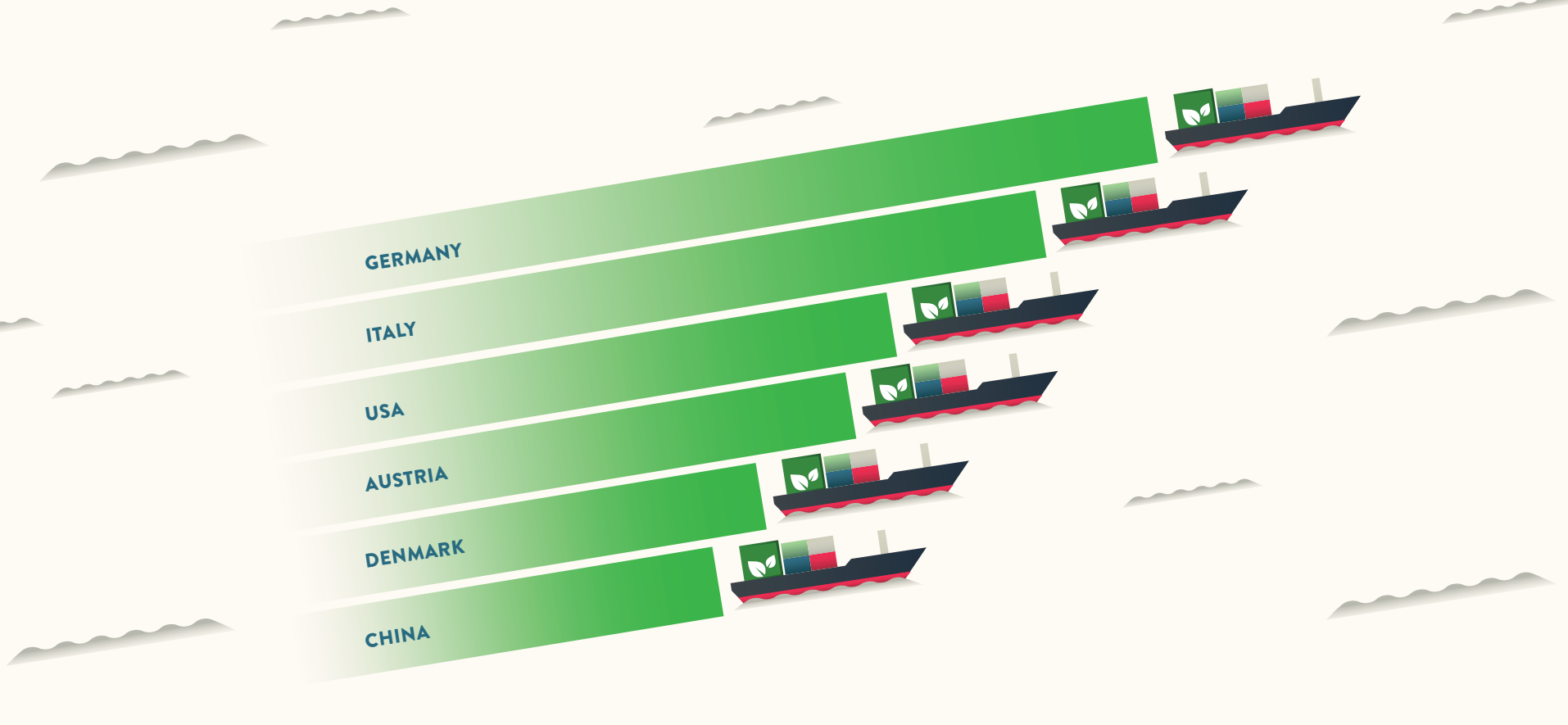


## MADE IN ITALY IS GETTING GREENER

More than 430,000 Italian companies in industry and services with employees (31.2% of the total) have invested in green technology and products between 2015 and 2019 - almost one in three. A growing value compared to the previous five year period when 345,000 companies invested (24% of the total). The figure rises for companies managed by under-35s, where the investment rate was 47%. Since 2015, the number of investments has almost tripled: from 7.9% of businesses to 21.5% in 2019 (equivalent to 300 thousand firms). The investments in energy efficiency and renewable sources are in the lead, together with cutting water and waste consumption, followed by reducing pollutants and increasing the use of secondary raw materials. Companies that invest in green technology export more, innovate more and employ more people. Currently, there are 3.1 million green jobs.

03.

Companies that plan to make eco-investments, yearly data 2011-2019 (percentages of total companies)



## ITALY RANKS **SECOND** FOR THE **EXPORT OF GREEN PRODUCTS**

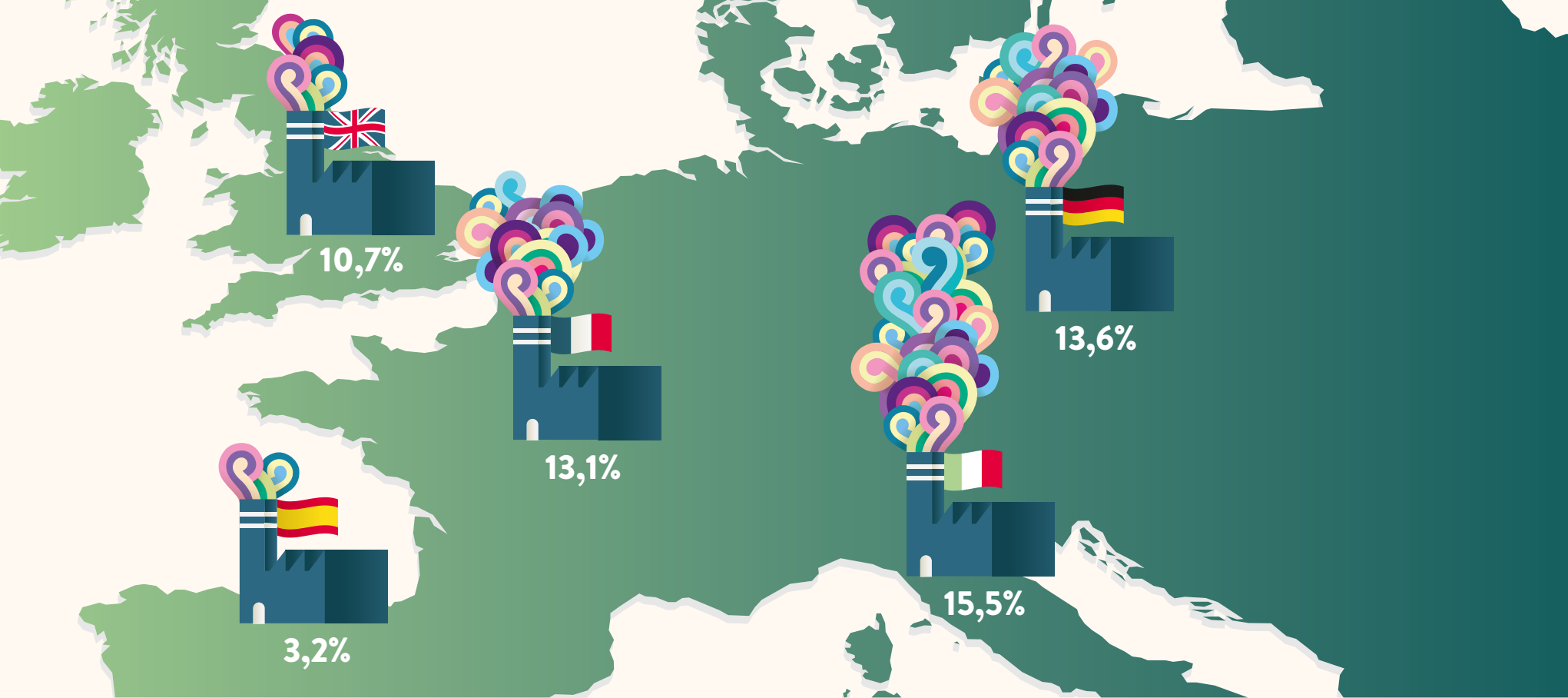
According to a study conducted by the University of Oxford, Italy ranks second in the world as per the Green Complexity Index, behind Germany and followed by the USA, Austria, Denmark and China, thanks to the number of environmental patents registered, low CO<sub>2</sub> emissions and strict environmental policies. The index, measuring the ability to export technologically advanced green products, estimates that Italy ranks first in potential development ahead of China, Spain, Germany and France. A confirmation that sustainability represents a strategic asset for the future of Made in Italy and our country has a key role in both growth and economic competitiveness in the green transition challenge.

# 04.

Green Complexity Index, 2020

SYMBOLA FOUNDATION, *ITALY IN 10 SELFIES. 2021*  
 SOURCE | Data processing by Symbola based on "Economic Complexity and the Green Economy", University of Oxford





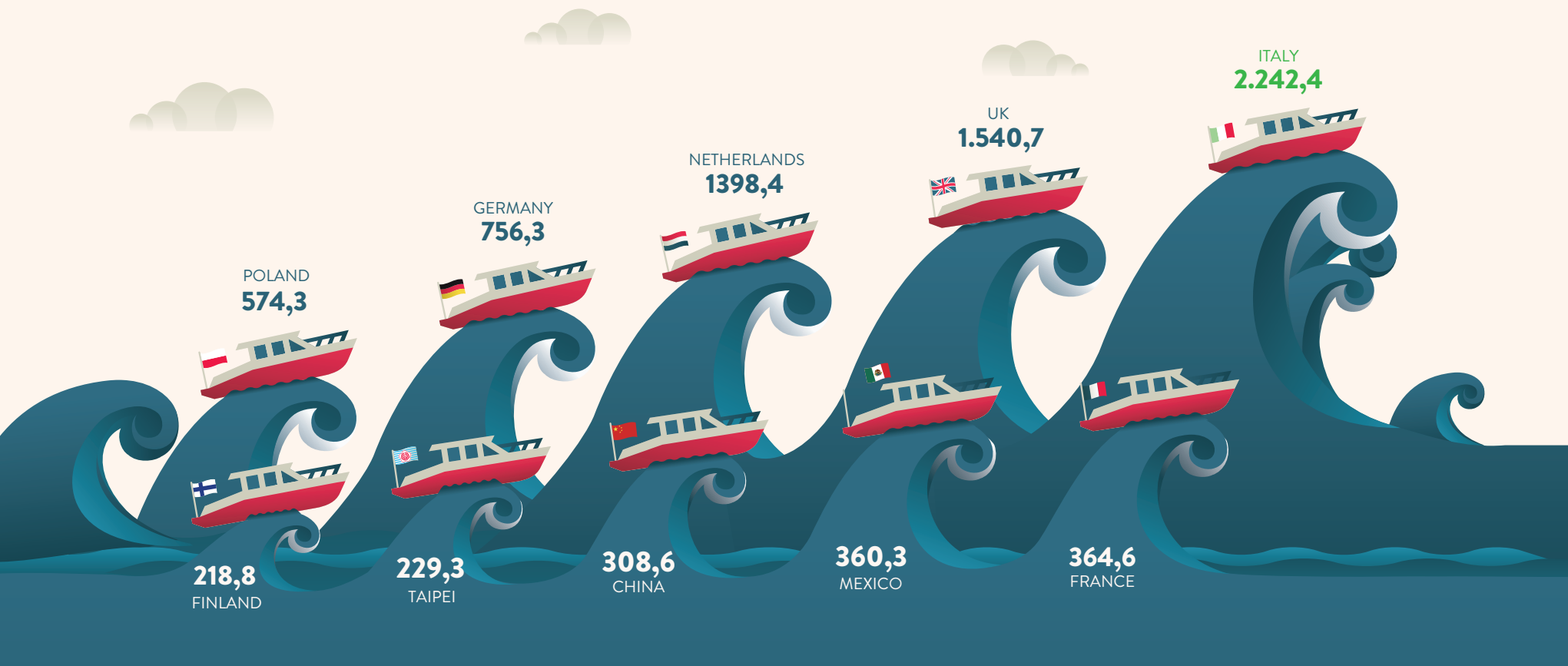
## DESIGN BRINGS STRENGTH TO MADE IN ITALY

Italy is the European country with the highest number of design companies with 15.5% of the EU total, followed by Germany (13.6%), France (13.1%), the United Kingdom (10.7%) and Spain (3.2%). This record is to be attributed to the strong link between design and Made in Italy. The 34,000 Italian design companies employ 64,551 workers and generate an added value of over 3 billion euros. They contribute up to 14.8% of turnover in the EU, just behind the UK and Germany. Milan is the capital of design once again: the city accounts for 18.3% of national added value and 14% of employees.

05.

Active design firms in Major EU Countries, 2018.  
(Percentage shares of EU total)

SYMBOLA FOUNDATION, ITALY IN 10 SELFIES. 2021  
SOURCE | Design Economy 2020, Symbola Foundation,  
Deloitte, ADI and POLIdesign

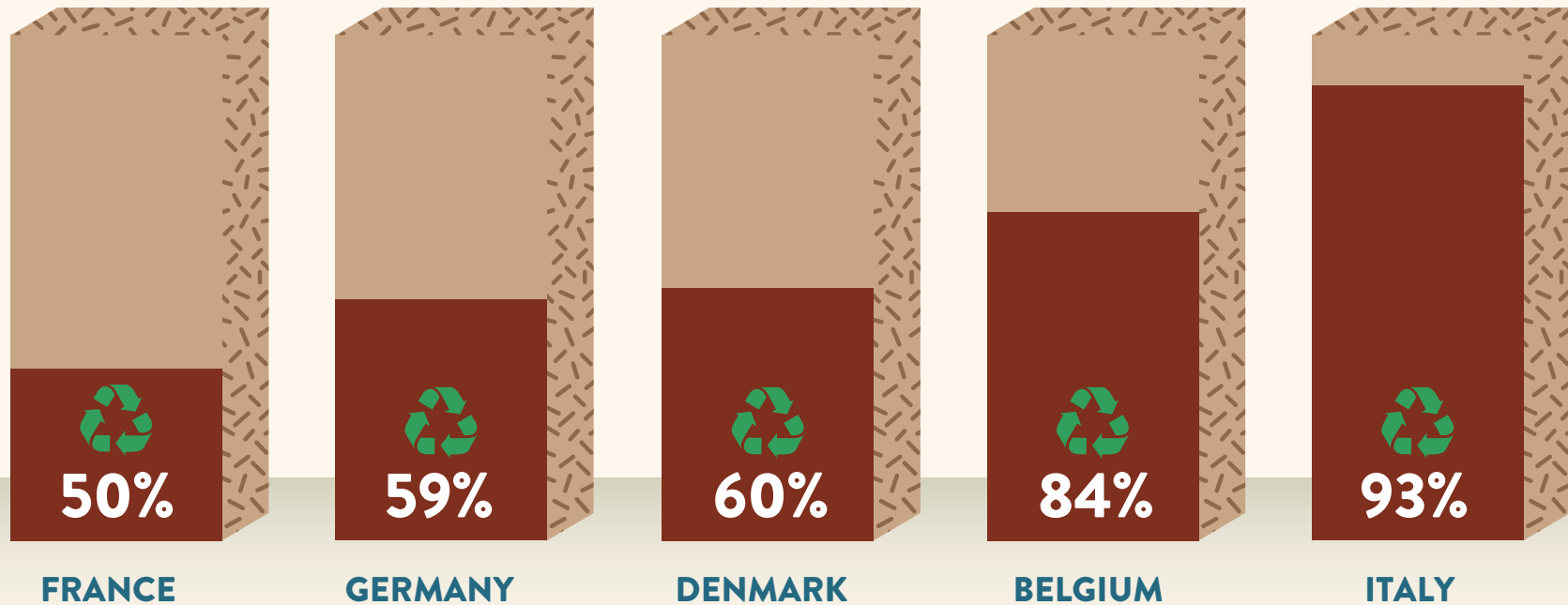


## WORLDWIDE YACHTING SPEAKS ITALIAN

In the yachting industry, Italy leads the way in terms of trade balance, with more than 2 billion dollars (2.2), ahead of the United Kingdom (1.5), the Netherlands (1.4), Germany (0.7), and Poland (0.5), and is one of the major exporting countries, being second only to the Netherlands, and ahead of the United Kingdom, the USA, France, and Germany. The Made in Italy yacht industry has a global turnover of 4.78 billion Euros, of which 1.64 billion in the internal market, and 23,510 direct employees.

# 06.

Yachting trade balance, top ten countries in the world, 2019. (millions of dollars)

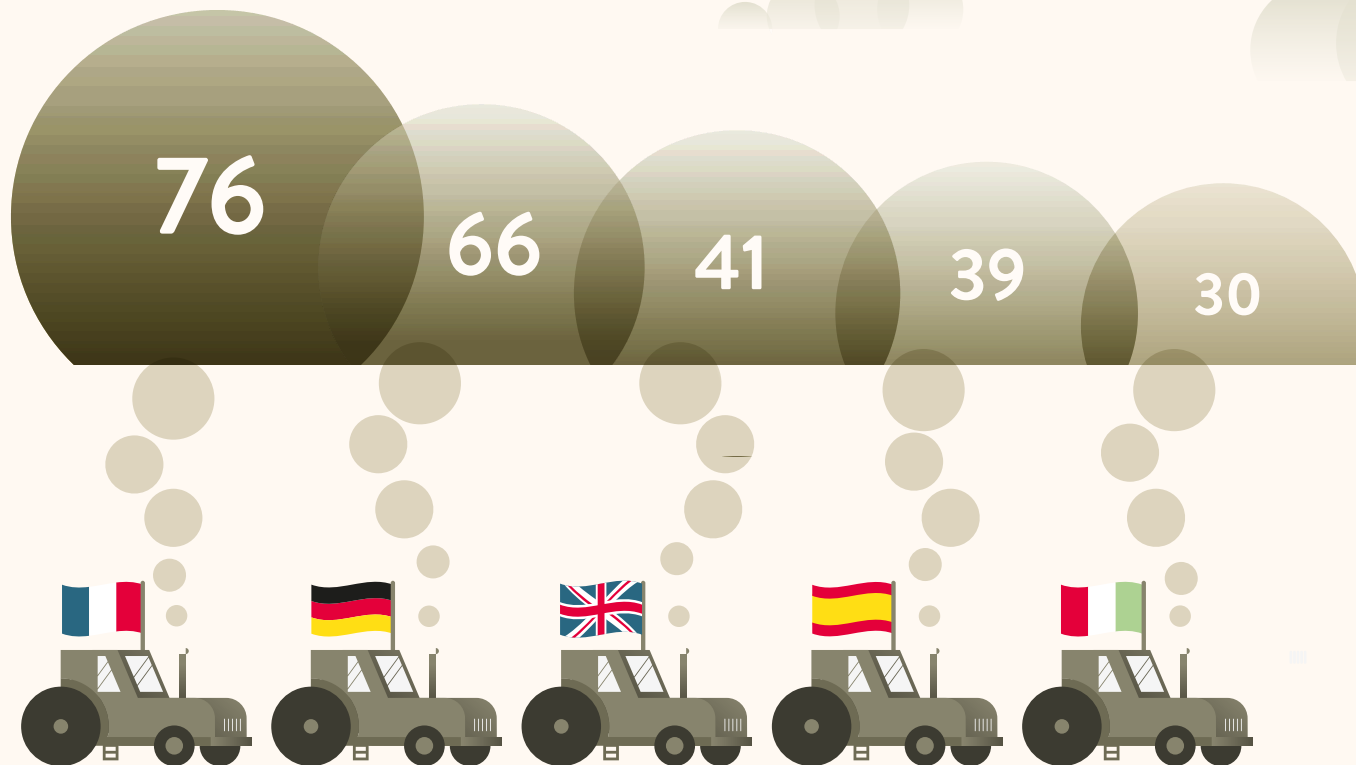


## ITALIAN WOOD FURNITURE LEADING THE WAY IN CIRCULAR ECONOMY AND EXPORTS

Italian wood furniture industry is first in Europe for the circular economy: 93% of particle board produced in Italy is made of recycled wood. Belgium follows with 84%, Denmark with 60%, Germany with 59% and France with 50%. Italy produces less climate-changing emissions than other major EU countries: 26 kg of CO<sub>2</sub> equivalent per thousand euros of production, compared to 43 in Germany, 49 in France, 79 in the UK and over 200 in Spain. At nearly 10 billion dollars (\$9.8 billion), Italy ranks third in the world for trade balance in furniture: only China (\$96 billion) and Poland (\$11 billion) have a higher balance, while Germany (-\$3.2 billion), the UK (-\$7.6 billion) and France (-\$7.8 billion) have negative balances.

07.

Share of recycled particle board in the total, top EU countries, 2018 (percentage values)

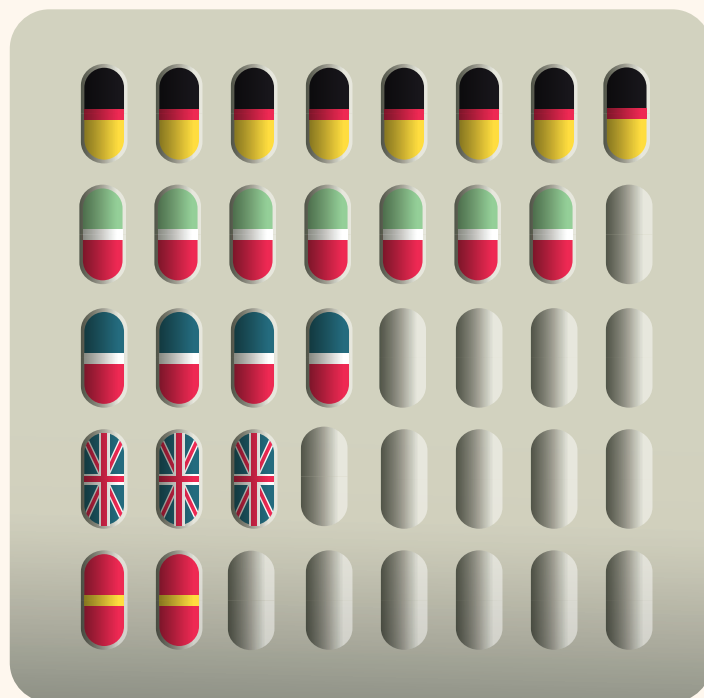


## ITALIAN AGRICULTURE TAKES THE LEAD IN EUROPE FOR SUSTAINABILITY

Italian agriculture is one of the most sustainable in Europe, with emissions of 30 million tons of CO<sub>2</sub> equivalent, well below France (76 million), Germany (66 million), the UK (41 million) and Spain (39 million). The sector has cut pesticide use by 20% (2011-2018), and where other countries have seen growth (France and Germany), it has increased use and production of renewable energy and reduced water consumption. The sector boasts 305 PDO/PGI products acknowledged at the EU level and 524 PDO/PGI wines, 5155 traditional regional products and the highest number of organic farms. In 2020, the agro-food sector set a record in exports with a value of 46.1 billion (+1.8% compared to 2019). Italy has the highest number of young people in the EU (more than 56,000 under-35s run farms) and women in agriculture (one in four - the 28% - is run by women: almost 210,000 entrepreneurs).

08.

Agricultural greenhouse gas emissions in CO<sub>2</sub> equivalents, 2018 (million tons emitted per million euro produced)



**GERMANY**  
**32,9**

**ITALY**  
**32,2** (34 in 2019)

**FRANCE**  
**23,2**

**UK**  
**23,0**

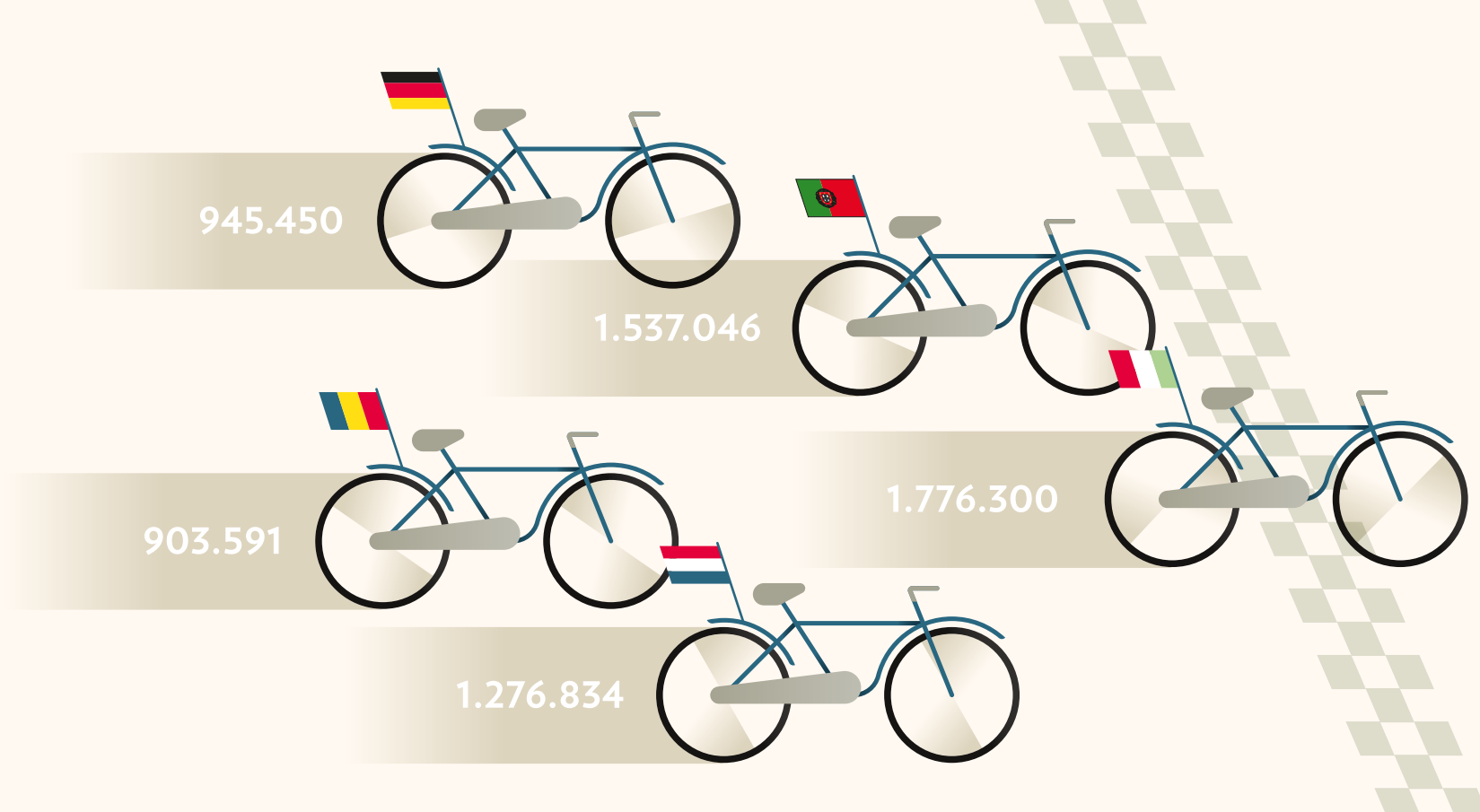
**SPAIN**  
**14,9**

## PHARMACEUTICAL INDUSTRY: PRODUCTION LEADER IN EUROPE, THANKS TO GROWING EXPORTS

Italy maintains a leading role in Europe for pharmaceutical production, with 32.2 billion euros (2018), just behind Germany with 32.9 billion euros, followed by France (23.2), the United Kingdom and Spain, with a growing value of 34 billion euros in 2019. Another reason for this is the growth in exports, which between 2009 and 2019 rose by 168%, almost twice the EU 28 average (+86%) and more than the other European big players (Germany +72%, Spain +51%, France +31% and the United Kingdom +11%). Over the last ten years, the sector has cut energy consumption and greenhouse gas emissions by 50%.

09.

Pharmaceutical manufacturing value, 2018  
(billion euros)



## ITALY IS EUROPE'S LEADING **BICYCLE EXPORTER**

Italy is the leading European exporter of bicycles for a total value of 609 million euros and a 15.2% growth over the previous year; we sell 1,776,300 bikes to foreign countries (2019), more than Portugal (1,537,046), the Netherlands (1,276,834), Germany (945,450) and Romania (903,591).

Italy accounts for 16.6% of total European exports. We rank first for saddle exports, 53.9% of the total worldwide. The bicycle industry counts 3,128 companies and generates a turnover of 1.03 billion euros. A major contribution to sustainable mobility.

10.

Number of bicycles exported per country, 2019



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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, thanks to intense analysis and research activity. 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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