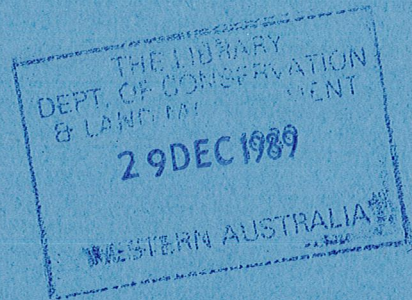




Department of Conservation
and Land Management

Date:
Reference:



Wood Utilisation Research Centre

**FURNITURE MANUFACTURING IN
ITALY - A STUDY TOUR
P.N. Shedley**

**December 1989
W.U.R.C. Technical Report no. 11
Limited Distribution**

Weir Road Harvey WA 6220 (097) 29 1913
50 Hayman Road Como WA 6152 (097) 367 0333

**FURNITURE MANUFACTURING IN
ITALY - A STUDY TOUR
P.N. Shedley**

**December 1989
W.U.R.C. Technical Report
Limited Distribution**

FURNITURE MANUFACTURING IN ITALY - A STUDY TOUR

P.N. Shedley

SUMMARY

A Western Australian group visited Italy in 1987 to assess furniture manufacturing, including education and training, and the prospects for exporting W.A. manufactured jarrah furniture. Visits to relevant International fairs in Cologne and Hannover in Germany were included in the tour. The report summarizes the major activities of the group and tour findings. It makes recommendations on promoting jarrah furniture, and on improving training, establishing furniture testing facilities, and research needs in Western Australia.

INTRODUCTION

A Western Australian group interested in furniture manufacturing and in developing export markets for W.A. manufactured furniture visited Italy in May 1987.

The tour was organised by the then W.A. Guild of Furniture Manufacturers and the Italian/Australian Businessman's Association.

TOUR AIMS

The tour was endorsed by the Australian Embassy in Rome and the W.A. State Government.

The aims of the overseas tour were:

1. To study the structure of the successful furniture manufacturing industry in northern Italy.
2. To view a world range of wood products, fixtures and fittings.
3. To examine the latest wood manufacturing equipment available.
4. To study Italian educational facilities and methods of training in the wood manufacturing industry.
5. To study the prospects for exporting Western Australian value-added timber products to Europe.

The group comprised:

- | | |
|--------------------------------------|---|
| Dino Gosatti
(Tour Leader) | Managing Director of Inglewood Products Group. Manufacturer and exporter of doors, outdoor furniture and kitchen units. |
| Allan Forbes | Manager of Bunning Bros veneer slicing and veneer exporting operations. |
| Luigi Fullin | Managing Director of Fullin Furniture. Manufacturers of panelled kitchen cabinets. |
| Guiseppe Mannino | Managing Director of Mannino Cabinets. Manufacturers of quality cabinets. |
| Ian Meadowcroft | Managing Director of D.S.J. Chairs (W.A.). Importers and assemblers of office furniture. |
| Phil Shedley | Co-ordinator of the Wood Utilisation Research Centre, Department of Conservation and Land Management. |
| Barry Williamson | Managing Director of Fremantle Furniture. Manufacturers of quality solid jarrah furniture. |

SUMMARY OF MAJOR ACTIVITIES

1. ITALY

1.1 Milan

- Visit the Austrade Office for discussions with the Australian Trade Commissioner (Philip Brandon).
- Visit furniture displays and some timber processing companies.

1.2 Pesaro

- Inspect manufacture of machinery used in the furniture industry.
- Inspect furniture manufacture.

1.3 Udine

- Discuss two-way trade with the Friuli Chambers of Commerce.
- Inspect furniture manufacture and finishing.
- Assess educational facilities.

2. WEST GERMANY

2.1 Cologne

- Visit the international display of wood products, fixtures and fittings at the Interzum Fair.

2.2 Hannover

- Visit the international display and demonstration of the latest wood manufacturing machinery and methods of wood processing at the Ligna Fair.

2.3 Frankfurt

- Visit the Austrade Office for discussions with the Australian Consul (John Cuthbertson) and the Austrade Marketing Officer (Win Dressler).

TOUR FINDINGS

1. The Western Australian furniture manufacturing industry can learn a great deal from its highly successful counterpart in the Friuli Region of north-eastern Italy.
 - The industry in Friuli imports most of its timber requirements and exports most of its finished furniture.
 - Strong emphasis is placed on education of all personnel, from top management to the shop floor. Secondary and tertiary courses are very thorough and well attended.
 - There is a good mixture of small specialist craft industries and large automated factories using the most modern computerised equipment.
 - New furniture is professionally designed, thoroughly tested by a Government testing laboratory (CATAS), and approved before manufacture and marketing is undertaken.
 - The finish on furniture is of a very high standard.
 - The high quality furniture reflects the emphasis on professional designing and thorough testing to national and international standards.
2. Although the volume market in Europe is for light coloured woods, such as oak, ash and beech, the rich red timbers like mahogany and cherry are in short supply and highly priced. Tasmanian oak and Victorian ash could find a place in the volume market, while jarrah and karri seem suited to a niche market for red cabinet wood.
3. There have been significant advances in techniques for producing veneers, reconstituting them and applying them to moulded panels. As valuable timbers

become scarce and highly priced, these techniques become increasingly attractive by improving recoveries. In addition, figured veneers bring very high prices.

4. Edge jointing of narrow boards into wide panels is a common technique in Europe, and particularly in France, for producing value products from small logs.
5. The Interzum Fair held in Cologne every two years provides a very wide exposure to world markets. The estimated attendance exceeds 15 000 per day for each of the five days.

Many organisations, states and countries promote their timber species and products at the Interzum Fair e.g. Papua New Guinea, Ghana, Ecuador, Bolivia, USA Hardwood Export Association, Michigan, Missouri, Mississippi, Pennsylvania, Indiana.

Interzum is an exposition of products, fixtures and fittings for the furniture industry. A vast array of material is displayed and buyers from all over the world are attracted to the wide range of products.

No Australian products were seen, although many Australian buyers, agents and prospective agents attended.

Interzum is an ideal forum for promoting jarrah and a very valuable exposition for manufacturers.

6. The Ligna Fair in Hannover follows Interzum every two years. It is conducted for seven days with attendances similar to that at Interzum.

At Ligna, machinery manufacturers display and demonstrate the world's finest wood working machinery. This ranges from in-forest chippers to furniture polishing equipment. It is a must for any processor or manufacturer wishing to update equipment.

Note: The Milan International Fair is held in the alternate years to the Interzum and Ligna and covers the fields of both of those fairs, as well as manufactured furniture.

7. The Austrade centres in Milan and Frankfurt would assist in promoting jarrah. The Australian Government, through Austrade, would subsidise \$ for \$ any promotional publicity. The Austrade Offices can provide a valuable means of obtaining up-to-date feedback on the results of the promotion. Both centres were very helpful in arranging contacts.

RECOMMENDATIONS

If the jarrah furniture manufacturing sector of the forest products industry is to develop export potential, a five year strategy plan should be prepared by the Guild of Furniture Manufacturers, in collaboration with the Forest Products Association, the Department of Conservation and Land Management and the Department of Industrial Development.

The Strategy plan should include the following points:

1. Promote jarrah as a fine finishing cabinet and furniture timber in Europe by mounting a display at the Milan Fair and at the Interzum Fair in Cologne. It is recommended that the State Government lease the sites at these fairs and provide promotional brochures, while the Guild of Furniture Manufacturers and Forest Products Association arrange for the display material.
2. Strengthen the available educational courses in the State for design and manufacture of furniture. Several options should be considered:
 - Send students or practitioners overseas for specialised courses
 - Attract guest lecturers to boost the content of local courses
 - Arrange exchange lecturers

One of the latter two is favoured as both offer prospects of wider dissemination of training skills.

3. Provide facilities for the testing of materials, finishes, joints and complete furniture items similar to those of the CATAS testing laboratory in Udine. Some facilities are now available at the Curtin University of Technology and these should be utilised initially to test a cross-section of W.A. designed and manufactured furniture.
4. Expand research into jarrah and karri veneer production and application by modifying techniques developed for other species. The potential for figured veneer production as well as conventional face veneer should also be explored.
5. Co-operate fully with the Austrade offices in Milan and Frankfurt for the promotion of W.A. timbers in southern and northern Europe respectively.
6. Encourage local manufacturers to visit recognised international fairs.