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FILCA - FEDERAZIONE  
ITALIANA LAVORATORI  
COSTRUZIONI E AFFINI

## **Federazione Italiana Lavoratori Costruzioni E Affini**

Italienische Gewerkschaft der Arbeiter in der Bauwirtschaft und sonstige

Italian Trade Union for workers in building and other industries

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# **National Report on the production, economic and trade union structure in the wood and furniture sectors in Italy**

## **PART IV**

### **Profile of the TOP 10 furniture producing companies in Italy**

**ROMA (March 2008)**

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**PROJECT INNOTrans 2007 – 2008**

Executor:  
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**INNOTrans** supports the foundation of an European network of trade union activists and employee representatives at factory level in the wood and furniture sector. **This project is financially supported by the EU in the frame of social dialogue**

**TAB 4 TOP - 10 - enterprises in the furniture industry**

Die 10 größten Unternehmen der nationalen Holzindustrie sind .... <b>The ten biggest national wood industrie enterprises are...</b>	Nr.	Nr.	Nr.	Nr.	Nr.	Nr.	Nr.	Nr.	Nr.	Nr.
	1	2	3	4	5	6	7	8	9	10
<b>Name des Unternehmens / name of the enterprise</b>	<b>Natuzzi</b>	<b>Doimo International Group</b>	<b>Poltrona Frau</b>	<b>Snaidero Group</b>	<b>Chateau d'Ax</b>	<b>Molteni</b>	<b>Scavolini</b>	<b>Calligaris</b>	<b>B &amp; B Italia</b>	<b>Lube cucine</b>
<b>Sitz des Unternehmens (Hauptstandort) / major location</b>	Sant'Eramo (Bari)	Treviso	Tolentino (Macerata)	Majano (Udine)	Lentate sul Seveso (Milano)	Giussano (Milano)	Montelabbate (Pesaro)	Manzano (Udine)	Novedrate (Como)	Treia (Macerata)
<b>Weitere Betriebsstätten / further locations</b>	<b>13</b>	<b>30</b>	<b>9</b>	<b>6</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>3</b>	<b>1</b>
Im Inland / <b>domestic locations</b>	8	30	8		n.a.	n.a.	n.a.	n.a.	3	1
Im Ausland / <b>locations abroad</b>	5		1		n.a.	n.a.	n.a.	n.a.		
<b>Produkte / Produktzweige des Unternehmens / products and production branches</b>	Upholstered furniture	Home and office furniture	Upholstered furniture	Kitchen furniture	Upholstered Furniture	Home and Office Furniture	Kitchen furniture	Home furniture	Home furniture	Kitchen furniture
<b>Zahl der Beschäftigten (abs.) / total number of employees</b>	<b>8,133</b>	<b>n.a.</b>	<b>1,060</b>	<b>1,500</b>	<b>1,000</b>	<b>800</b>	<b>534</b>	<b>650</b>	<b>508</b>	<b>470</b>
Beschäftigte/ <b>employees 2006</b>	8,133	n.a.	1,060	1,500	1,000	800	534	650	508	470
<b>Umsatz / business volume</b> (in million U.S. Dollar)	<b>988</b>	<b>465</b>	<b>345,5</b>	<b>312,7</b>	<b>309,4</b>	<b>263,8</b>	<b>232,4</b>	<b>209,2</b>	<b>191</b>	<b>163,6</b>
<b>Umsatz / business volume 2006</b>	988	465	345,5	312,7	309,4	263,8	232,4	209,2	191	163,6
<b>Exportanteil</b> (in Mio. € bzw. in % v. Umsatz) / <b>export accounts for</b> (in % of business volume)	<b>89,50%</b>	<b>n.a.</b>	<b>40%</b>	<b>66%</b>	<b>70%</b>	<b>55%</b>	<b>14%</b>	<b>55%</b>	<b>66%</b>	<b>n.a.</b>
Exportanteil / <b>export account 2006</b>	89,50%	n.a.	40%	66%	70%	55%	14%	55%	66%	n.a.

Reference: CSIL

# Natuzzi

[www.natuzzi.com](http://www.natuzzi.com)

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## CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

Italsofa Bahia Ltd, Minuano Nordeste SA, Italsofa Shangai Ltd, Softaly Shangai Ltd, Italsofa Romania, Natco Spa, I.M.P.E. Spa, Nacon Spa, Lagene srl, Natuzzi Americas Inc, Natuzzi Iberica SA, Natuzzi Switzerland AG, Natuzzi Nordic, Natuzzi Benelux Spa, Na

## BRANDS, TRADEMARKS

Natuzzi, Italsofa

ACTIVITY	Manufacturer		
MAIN PRODUCTION	Furniture	FURNITURE PRODUCT SPECIALISATION	Upholstered furniture
STOCK EXCHANGE	New York	STOCK SYMBOL	NTZ
THE COMPANY IS PART OF	Gruppo Natuzzi		
YEAR OF ESTABLISHMENT	1959	EMPLOYEES	8133
		TURNOVER USD	988 million

## History

Natuzzi was founded in 1959 by Pasquale Natuzzi in Santeramo in Colle, Italy. The company designs, produces and sells modern, contemporary and traditional leather-upholstered furniture and furnishings accessories for residential use. It is the largest Italian producer in the furnishings sector and world leader in the leather sofas segment, claiming large shares of the market in both North America and Europe.

Industrie Natuzzi SpA Holding has been quoted on the New York stock exchange since 1993 (NTZ).

## Financial Highlights

In 2006 Natuzzi recorded a total turnover of USD 988 million (+24.5% on 2005).

Upholstery sales amounted to USD 830 million. About 89.5% of turnover is generated outside Italy in 124 countries on five continents. Main market remains the USA (32.1%).

## Manufacturing process

The company employed 8133 employees in 2006.

The group manufactures exclusively to order and controls over 92% of the raw materials and semifinished goods destined for its production.

Natuzzi has today 8 production sites in Italy and 5 abroad (2 in Brazil, 2 in China and 1 Romania).

## Products

Natuzzi produces over 400 models of traditional, classical and modern upholstered furniture, in all price ranges including stationary (sofas, loveseats, armchairs), sectional, motion furniture, sofa beds and occasional chairs with 480 different coverings in leather (87%), microfibre and fabric.

## **Marketing**

Natuzzi has two distinct brands: Natuzzi, which addresses the medium-high end of the market and Italsofa, the promotional brand. Natuzzi is deepening its penetration of the middle/high price segment of the global leather furniture market as well as increasing market share in the promotional segment.

## **Distribution channels**

The Company sells its products, as at December 31, 2006, through a chain of 278 Natuzzi store and Divani & Divani by Natuzzi stores, and 560 Natuzzi galleries. In Italy, the Company sells its furniture primarily through its franchised chain of 124 Divani & Divani by Natuzzi Stores and 1 Natuzzi Store, while in the U.S. Natuzzi's products are distributed through major department stores and leading furniture retailers. In addition, there are 158 Divani & Divani by Natuzzi and Natuzzi Stores operating in Europe and other major markets around the world. The Company continued to open new Natuzzi stores and galleries also in the second half of 2007.

In 2003 Natuzzi acquired the British company Castlegate 170 Ltd, UK's leader in the leather upholstery distribution. The company controls the Kingdom of Leather brand (7 stores in the UK).

# Doimo International Group

[www.doimointernational.it](http://www.doimointernational.it)

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## CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

Arrital Cucine srl, Birex srl, Dall'Agnese, Dielle srl, DOC Mobili Spa, Domo City Line Spa, Doimo Contract, Doimo Cucine srl, Doimo Design, Doimo Desktop, Doimo International, Doimo Kids, Doimo Materassi srl, Doimo Passport, Doimo Salotti Spa, Doimo Sofas, Colmas, Della Valentina Office, Ennerev, Frezza, Target, IB Office, Emmegi, Meco, Linea Italia, Linea D Italia,

## BRANDS, TRADEMARKS

Arrital, Birex, Doimo, Passport, Dielle, Meco office, Doimo City Line, Doimo Sofas, Dell'Agnese, Doimo Salotti, Linea D, Linea Italia, DD, Summer Doimo, Doimo Desktop, Doimo Cityline Kids, DOC Mobili

ACTIVITY	Manufacturer		
MAIN PRODUCTION	Furniture	FURNITURE PRODUCT SPECIALISATION	Home and Office furniture
YEAR OF ESTABLISHMENT	1946	EMPLOYEES	n.a.
			TURNOVER USD 465 million

## History

Doimo International Group, based in Mosnigo di Moriago, Italy, is a manufacturing company.

In 1946 the first production unit of Doimo was set up specialising in the manufacture of bedroom furniture and in 1949 the Doimo Group was born.

In 1968 Doimo Salotti was established. In 1971 Linea Italia was set up, and the latest acquisition was made in 2004 with Dall'Agnese, a manufacturer of classical, wooden dining, living and bedroom furniture. Acquisitions have always been an important part of the growth of the Doimo Group since its foundation.

## Financial Highlights

In 2006 Doimo International Group recorded a total turnover of USD 465 million.

Major export markets include Germany, France, Spain, Belgium, Russia, Ukraine, Greece, Turkey, North and South America.

## Manufacturing process

In the home segment Doimo has 23 companies employing a total of 1,040 people and a total surface of 260,000 square metres. In 1996 Doimo International Group was founded in order to focus on international markets. The company is completely independent and its purpose is to trade Doimo furniture including home furniture, home office and mattresses on the international scene.

Today the Doimo Group comprises 30 independent companies, of which 23 in the home segment and seven in the office segment covering the middle to upper-middle range of the furniture market. Products include home furniture, bathroom furniture, kitchen furniture, occasional furniture, mattresses and office furniture.

The firms active in the office segment are: Colmas, Della Valentina Office, Frezza, Target, IB Office, Emmegi and Meco.

The Frezza Group has its headquarters in Vidor in the province of Treviso, and in the office segment it is active with two brands, Frezza and Target. Its production facilities include 80,000 square metres of factories that are highly automated and structured to carry out the whole production process. The firm has three foreign branches in Brussels, Rotterdam and Caracas, and its main export markets are the European Union with the Netherlands, Belgium and Spain, Russia, Latin America and the United States. The US market has shown growth in recent years also thanks to the investments made by the firm, which opened a showroom in New York in 2005.

Della Valentina is located in the province of Pordenone and joined the Doimo group in 1993. Activities are carried out in an industrial complex of roughly 50,000 square metres and exports, which account for about 60% of production, enable the firm to be present in more than 100 countries. The product range is extensive and includes collections of operative and executive furniture and partition walls.

Emmegi has operated for 30 years in the office and community seating segment, it is based in Monselice in the province of Padua where it has a factory of 30,000 square metres. The firm employs 50 workers and makes 40% of turnover through exports.

Meco Office, which joined the Doimo Group in 1992, has two productive units located in the industrial zone in Rovigo that extend for a total covered area of 25,000 square metres. Meco is present on the metal furniture market and specialises in the manufacture of storage furniture and filing systems, but its product portfolio also includes desks and walls. It exports roughly 44% of production (recording an increase of 17% compared to 2005).

Doimo Materassi was founded in 1986. The company employs around 100 people in mattress and slatted base production. It has a factory of 30,000 square metres.

## **Distribution channels**

Regarding distribution, the Group still distributes its furniture exclusively through traditional furniture retailers. There are 8,000 sales outlets selling Doimo's home furniture in Italy and another 900 outside Italy. In 2002 the company opened Doimo Domus Interior Galleries, a permanent exhibition of Doimo home products.

# Poltrona Frau

[www.poltronafrau.it](http://www.poltronafrau.it)

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CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES  
Cappellini, Thonet, Cassina, Alias, Gufram, Nemo

BRANDS, TRADEMARKS  
Poltrona Frau, Cappellini, Thonet, Cassina, Alias, Gufram, Nemo

ACTIVITY	Manufacturer		
MAIN PRODUCTION	Furniture	FURNITURE PRODUCT SPECIALISATION	Upholstered furniture
STOCK EXCHANGE	Milan	STOCK SYMBOL	PFG
THE COMPANY IS PART OF	Poltrona Frau Group		
YEAR OF ESTABLISHMENT	1912	EMPLOYEES	1060
		TURNOVER USD	345.5 million

## History

Poltrona Frau, manufacturer of top range designer upholstery furniture in leather, was founded in 1912 and in 1962 the company was acquired by the Nazareno Gabrielli Group.

In 1990 the company was taken over by Franco Moschini, General Manager, through a leverage buyout.

In 2001 the company acquired the Austrian upper end furniture manufacturer Thonet for roughly USD 11 million in order to reinforce its position on the international scene. Thonet furniture continues to be manufactured in Austria.

In 2003 the Charm Fund acquired 30% of Poltrona shares.

In 2004 Poltrona Frau acquired the Italian Cappellini. Cappellini was founded in 1946 and has today around 100 employees. Production is in-house, or outsourced to small, local workshops. Cappellini exports 17% of its sales to the USA.

In May 2005 Poltrona Frau acquired 100% of the upper end specialist Cassina from the French Fimalac SA. Fimalac and the Cassina Family Holding finalised the agreement with Poltrona Frau. As a result of the acquisition, Poltrona Frau has become one of the world's biggest furniture and design Groups. Cassina operates flagship stores in Milan, Paris, New York and Tokyo. With the takeover of Cassina, Poltrona Frau aimed at strengthening its positions on international markets.

In November 2006 Poltrona Frau, together with all group companies, was publicly quoted on the Milan stock exchange (trading symbol: PFG).

## Financial Highlights

In 2006 Poltrona Frau Group registered a total turnover of USD 345.5 million (Poltrona Frau USD 141.2 million, Cassina USD 136.1 million, Cappellini USD 23.8 million, Alias USD 27.6 million).

Almost 40% of its production is exported, primarily to Europe (Germany, France) followed by the Asian Pacific region and the USA.

## **Manufacturing process**

In December 2006 the Group counted 1,060 employees. At the beginning of 2007 the group counts on 8 manufacturing plants in Italy and one in China, by the end of 2008 the total number of plants is to be reduced to 5, each specialising in a product family further to a reorganization programme.

## **Products**

Upholstery represents over 65% of production. Poltrona Frau manufactures mainly sofas with 95% of upholstery manufactured being covered with leather.

## **Distribution channels**

The commercial network of the Group covers over 65 countries. The group further operates over 60 mono-brand stores and collaborates with 700 upper end retailers.



# Snaidero Group

[www.snaidero.it](http://www.snaidero.it)

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## CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

Rational einbaukuechen GmbH, CBI, Regina GmbH, Cuisines Plus, Ixina, SDI Slavonska Drvna Industrija d.o.o., Euro Cucina Ltd

## BRANDS, TRADEMARKS

Snaidero, Arthur Bonnet, Comera, Rational, Regina

ACTIVITY	Manufacturer		
MAIN PRODUCTION	Furniture	FURNITURE PRODUCT SPECIALISATION	Kitchen furniture
YEAR OF ESTABLISHMENT	1946	EMPLOYEES	1500
			TURNOVER USD 312.7 million

## History

Snaidero was established in 1946 as a craftsman's workshop in Majano, Friuli, by Cavaliere Rino Snaidero. In the space of a few years the kitchen manufacturer grew to industrial dimensions. It was the first Italian company in the sector to avail itself of industrial design and in particular of world famous designers such as Pininfarina, Lucci Orlandini and Iosa Ghini. During the 1960s Snaidero became leader of the modular kitchen segment in Italy, thanks to the Spaziovivo and Cruscotto lines.

At the end of the 1970s Snaidero adapted its production and technology to suit the needs of the market it was targeting and began manufacturing custom-built kitchens instead of the previous serial production. Between 1970 and 1975 the company began to penetrate foreign markets, firstly Belgium, and then France, Switzerland, the Netherlands and the whole of Europe. Subsequently, in 1979, it opened a production plant in Canada, which was then transferred to Los Angeles (USA).

The desire to expand into the international arena was sharpened with the acquisition of the German company, Rational, in 1993. The acquisition of the German firm marked a turning point in Snaidero's history: for the first time an Italian company broke into the largest market in Europe. The growing Snaidero Group further consolidated its process of internationalisation.

In March 2000 it purchased the Arthur Bonnet Group, the third leading kitchen manufacturer in France. The company now has four plants in France that produce the Arthur Bonnet, Comera and Cuisine Plus brand kitchens for the retail sector.

In May of the same year, the Group added Regina, the top brand in Austria.

In 2003 the company acquired Ixina, a Belgian network that specialises in the franchising of kitchens and household appliances.

Finally, in 2006, the creation of SDI Slavonska Drvna Industrjia d.o.o., a Croatian company specialized in the production of wood semi-finished components.

## Financial Highlights

In 2006 Snaidero Group recorded a total turnover of USD 312.7 million (+5.6% on 2005).

Italy represents the major market for the Snaidero Group in terms of total sales, thanks to the continuous growth of Snaidero Rino Spa with its network of 500 specialist dealers on the national market.

Exports account for 66%, France and Germany are the main markets.

## **Manufacturing process**

Today the Snaidero Group has six production plants in Italy, France, Germany and Croatia, eight sales offices, over 1,500 employees and more than 2,000 outlets in 80 countries. In addition to its production facilities located in Italy, Germany, France and Croatia, the Snaidero group also has commercial branches in the United States, the United Kingdom, Spain, Austria and the Middle East.

## **Marketing**

The Group today is an international federation of companies that has developed a growth strategy along three main lines of business:

Business to Consumer, where, via the Snaidero, Arthur Bonnet, Comera, Rational and Regina brands, the Group is reinforcing its position in the mid-to high-end market in Europe by offering innovative, design-oriented and identifiable brands.

Franchising, where, with a unique concept and an expanding network of sales outlets such as Cuisine Plus and Ixina, the Group is now the leader in Europe in this specialist distribution channel for kitchens and household appliances.

Business-to-Business. Snaidero group, through its international brand portfolio has become a point of reference in the contract sector, a mark of high quality that characterizes the most renowned residential project developments throughout the world.

## **Certification**

The company is ISO:9001, ISO 14000 and SA 8000 certified.

## Chateau d'Ax

[www.chateau-dax.it](http://www.chateau-dax.it)

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CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

CEMEPRO SPRL (BELGIUM), CINQUECIR SRL, ERRECIDUE SRL, SOFALAND SRL, MA.TRA.X SRL, SULAX FURNITURE PVT LTD (INDIA)

BRANDS, TRADEMARKS

Chateau d'Ax

ACTIVITY	Manufacturer, Trade		
MAIN PRODUCTION	Furniture	FURNITURE PRODUCT SPECIALISATION	Upholstered furniture
YEAR OF ESTABLISHMENT	1948	EMPLOYEES	1000
		TURNOVER USD	309.4 million

### History

Chateau d'Ax was founded in 1948 by the Colombo family. The company is specialized in the production of upholstery furniture.

In 2000, Chateau d'Ax finished the extension of its head office in Lentate sul Seveso, Italy, a small town between Como and Milan.

### Financial Highlights

Total sales in 2006 reached USD 309.4 million of which around 70% came from exports.

### Manufacturing process

The company's production facility in Italy covers 120,000 square meters.

Chateau d'Ax employs presently around 1,000 people worldwide.

### Products

The production of upholstery furniture represents 90% of total sales and small furniture covers the remaining 10% of sales. Chateau d'Ax is specialized in upholstery primarily covered with leather or microfibre in classical and modern contemporary style.

### Distribution channels

The company disposes of 110 sales points in Italy. Outside Italy Chateau d'Ax is sold throughout in Israel, Belgium, France, Portugal, Spain and the USA.

### Certification

In 1999 the company was ISO 9002 certified.

# Molteni

[www.molteni.it](http://www.molteni.it)

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CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

Dada, Unifor, Citterio

BRANDS, TRADEMARKS

Molteni, Dada, Unifor

ACTIVITY Manufacturer, Trade

MAIN PRODUCTION Furniture FURNITURE PRODUCT SPECIALISATION Home and Office furniture

THE COMPANY IS PART OF Gruppo Molteni

YEAR OF ESTABLISHMENT 1930 EMPLOYEES 800 TURNOVER USD 263.8 million

## History

The Molteni Group is one of Italy's leading furnishings companies. It was founded in the early 1930s and is based in Giussano, Milan. In the 1950s it started to expand, opting for mechanisation and industrial production. In the 1970s it split into three companies because of its increasing size and in order to respond more effectively to market demands.

The Molteni Group is one of the few to boast an integral work cycle with total control of production from the choice of materials to final definition. Today the Molteni Group is one of Italy's leading industrial furniture groups and comprises four companies, each a leader in its own sector: Molteni & C. Spa (home furniture), Unifor Spa (office furniture), Dada Spa (kitchen furniture), and Citterio Spa (office furniture, partitions and walls).

## Financial Highlights

In 2006 Molteni recorded a total turnover of USD 263.8 million (+3.4% on 2005).

## Manufacturing process

The Molteni Group employs about 800 people and comprises four companies:

Molteni&C Spa produces home furniture including living rooms (40%), wardrobes (28%), beds (10%), tables, seating and upholstery (17%). Molteni & C Spa recorded sales worth USD 107.1 million in 2006 of which 55% came from exports. The number of employees in 2006 was 270.

Molteni & C. has 275 sales outlets in Italy and 350 on the international markets. The company distributes exclusively through independent retailers (excluding the contract division).

Over the course of 2006 Unifor recorded a total turnover of USD 105.3 million; sales in Italy increased by 11% to reach a value of USD 36.9 million. Growth on international markets was exponential, thanks to the winning and completing of some large contract orders. Unifor is the sole distributor for the Swiss firm Vitra AG in Italy and Australia and operates exclusively at the upper-end of the market; the firm currently employs a workforce of over 200.

Unifor was established in 1969 as a division of the Molteni Group. It is an autonomous structure, but it is integrated with the other companies in the group, with whom it shares resources, the basic organisation and a series of related services.

Dada Spa in 2006 recorded sales worth USD 25.2 million, exports around 30% of its production. The company operates in top range kitchens.

Citterio, started as a producer of furniture in 1960, operates in the office furniture sector with a strong specialisation in wall-to-wall units and partition walls. Today Citterio produces on an area of 120,000 square metres of which 21,000 are covered, and it has a capillary commercial network. In 2006 turnover was USD 28.9 million, exports are around 25% of its production.

## **Marketing**

The Group has four brands: Molteni (Household and upholstered furniture), Unifor (office and contract furniture), Dada (kitchen furniture) and Citterio (office furniture). For Molteni and Dada the sales of the contract segment represent about the 25% of the total revenues.

## **Distribution channels**

Molteni exports through a network of over 350 sales outlets, ten of which are single-brand stores dedicated to the Molteni&C and Dada brands.

Molteni also works extensively on large contracts, e.g. hotels, museums, ships, chains of shops, hospitals and theatres. Examples of recent contracts are the interiors for the Walt Disney cruise ships built by Fincantieri; the furnishings for the Cartier chain of boutiques all over the world and for the Cartier Foundation in Paris, and the Istituto Oncologico Europeo (IEO) in Milan; The interiors of the La Fenice theatre in Venice and the furnishings in the public spaces on Holland America Line and P&O North Sea Ferries cruise ships.

# Scavolini

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CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

BRANDS, TRADEMARKS

Scavolini, Ernestomeda, Scavolini Basic

ACTIVITY Manufacturer

MAIN PRODUCTION Furniture FURNITURE PRODUCT SPECIALISATION Kitchen furniture

YEAR OF ESTABLISHMENT 1961 EMPLOYEES 534 TURNOVER USD 232.4 million

## History

Scavolini was established in Pesaro in 1961 thanks to the initiative of the brothers Valter and Elvino Scavolini. In just a few years it developed significantly, from an artisan-based firm into the leading kitchen furniture manufacturer in central Italy.

In April 1995 the company launched a new brand to cover the middle/lower-middle range which was later marketed under the name Scavolini Basic.

In 1996 it acquired Nicolini Cucine whose brand was changed to Ernestomeda, which is positioned in the upper-middle/top range, with a "brand name" product at a competitive price. Scavolini itself serves the middle/lower-middle market segment with the Scavolini Basic line. Scavolini offers a wide range of classic, modern, trendy and country styles in the middle/upper-middle market segment.

## Financial Highlights

In 2006 Scavolini recorded a total turnover of USD 232.4 million (+4.3% on 2005) with exports accounting for 14%.

## Manufacturing process

The Company today boasts an industrial plant of about 183,000 square metres (75,000 of which is covered) and a staff of 534 people.

## Distribution channels

The level of distribution has reached an international dimension and the more than 1,000 Scavolini dealers and sales outlets are spread throughout the countries of the European Union and Eastern Europe, and also other areas of the world such as Turkey, India, Israel, Cyprus, China, Indonesia, the United States and Latin America.

## Certification

In 1996 Scavolini received certification of its Quality System according to the ISO 9001 international norm which was confirmed in October 2002 according to the UNI EN ISO 9001: 2000 international norm, also called Vision 2000. In December 2004 Scavolini also received certification of its Environmental Management System according to the UNI EN ISO 14001 norm.

# Calligaris

[www.calligaris.it](http://www.calligaris.it)

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CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES  
Calligaris d.o.o., Calligaris USA, Calligaris Japan Y.K

BRANDS, TRADEMARKS  
Calligaris

ACTIVITY Manufacturer

MAIN PRODUCTION Furniture FURNITURE PRODUCT SPECIALISATION Home furniture

THE COMPANY IS PART OF Calligaris Group

YEAR OF ESTABLISHMENT 1923 EMPLOYEES 650 TURNOVER USD 209.2 million

## History

Calligaris SpA, based in Manzano, Italy, is a manufacturing company.

In 1923 Antonio Calligaris founded the company and began producing chairs. In the 1970s the company started exporting its products.

In the 1990s the brand's increasing echo and the international market's growing attention towards Italian products and design convinced Calligaris to start distributing its products all over the world, opening international branches and reorganizing production in four new sites. Calligaris comprises five different companies: a holding company which supervises and coordinates the Group's strategies; Calligaris d.o.o, where raw materials are bought and where the initial production takes place; Calligaris USA, which deals with the North American market, Calligaris Japan Y.K. which follows the Japanese market and Calligaris S.p.A., the core of the Group. The headquarters is in Manzano, in the North of Italy.

## Financial Highlights

In 2006 Calligaris recorded a total turnover of US\$ 209.2 million (+16.7% on 2005).

Exports account for an important part of Calligaris' turnover (55% in 2006).

Its main export markets include Europe (primarily Germany and France), Russia and Eastern Europe (only for upper-end furniture), North America and Asia. Europe and the US make up roughly 50% of the company's turnover.

## Manufacturing process

The company had a workforce of 650 in 2006.

Calligaris has eight production plants.

The production and supply of raw materials is carried out by Calligaris d.o.o. in Ravna Gora, Croatia. The sawmills, dryers and joinery are all housed in this factory.

In Italy Calligaris' Research and Development activities are based at the headquarters in Manzano, as are the logistics and the coating of products. This factory covers an area of 67,000 square metres, of which 26,000 square metres are covered. Located close to the

headquarters are another three plants: two in San Giovanni al Natisone, one for assembly and storage, and the other exclusively as a warehouse, and the third at Cormons for assembling products.

Calligaris is present in the United States via Calligaris USA Inc. that has two facilities, one on the East Coast (High Point, NC) and the other on the West Coast (San Leandro, CA) that take care of logistics, warehousing and customer service for the US market.

In Japan Calligaris Japan Y.K. carries out the same activities as the US subsidiary, but for the Japanese market.

## **Products**

Today Calligaris has a diversified chair production and is also active in home furniture manufacture, including tables, desks, relaxing chairs, living room furniture, beds and occasional furniture (TV stands, accessories etc.).

## **Distribution channels**

The Calligaris Group operates through over 12,000 sales outlets in 90 countries and has 200 agents worldwide. After opening the new Kobe branch in Japan in 2005, in 2006 the Group opened two megastores in New York.



## B&B Italia

[www.bebitalia.it](http://www.bebitalia.it)

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CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

Moooi

BRANDS, TRADEMARKS

B&B Italia, Maxalto

ACTIVITY Manufacturer

MAIN PRODUCTION Furniture FURNITURE PRODUCT SPECIALISATION Home furniture

YEAR OF ESTABLISHMENT 1966 EMPLOYEES 508 TURNOVER USD 191 million

## History

B&B Italia spa, based in Novedrate, Italy, is a manufacturing company.

B&B was established in 1966 as C&B and has been transformed into B&B Italia in 1973. The company's head office is located in Novedrate, Italy. B&B is specialized in top range furniture and its activities include home furnishing (of which 70% for residential) and supplies for hospitality and other facilities (around 30%).

## Financial Highlights

In 2006 B&B Italia recorded a total turnover of USD 191 million (-1% on 2005). Around 66% of the turnover was generated by exports.

In 2006 B&B acquired 50% of Moooi, a fast growing, prestigious Dutch company based in Breda, in the Netherlands, that is active in the design sector (furnishing accessories and lighting). Moooi was founded in 2001 and estimated turnover is of USD 14 million in 2006. The aim of the collaboration is to combine the culture and the creative assets of the two companies in terms of product development and in terms of distribution. According to B&B, the acquisition of 50% of Moooi is a further important step in reinforcing B&B Italia's leadership in the high end design furniture market all over the world, through an extensively lifestyle market segmentation.

## Manufacturing process

B&B Italia has been split up in two divisions since January 2002: B&B Italia Casa and B&B Italia Contract, which includes also the Marine area, while the Home division distributes the two collections under the brands B&B Italia and Maxalto.

The company has 3 production facilities which cover a total area of over 67,000 square metres. Moreover the company disposes of its own research and development centre and invests each year over 3% of its turnover in this field.

B&B Italia employs 508 people.

## **Products**

About 47% of production is upholstered furniture. The B&B Contract Division has developed a specific competence in cruise ship fittings and furnishings of hotels and other public facilities like retail operations and restaurants.

## **Marketing**

B&B is present on the market with the two following trademarks: B&B Italia and Maxalto (since 1975).

## **Distribution channels**

Present in over 54 different countries, B&B disposes of 230 sales outlets in Italy and around 500 outside Italy. The company's latest opening was the B&B store in Soho, New York City in March 2007. This is already B&B's second store in Soho. The company concentrates on reinforcing its distributive structure throughout the opening of monobrand showrooms or "dedicated corners" in selected points of sales.

## **Certification**

ISO 9001

## Lube cucine

[www.cucinelube.it](http://www.cucinelube.it)

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### CONTROLLED COMPANIES, SUBSIDIARIES, OTHER RELATED COMPANIES

Heral Cucine srl, Cucine Export srl, Borgo Antico srl, Faer Ambienti

### BRANDS, TRADEMARKS

Cucine Lube, Heral Cucine, Cucinexport, Borgo Antico

ACTIVITY Manufacturer

MAIN PRODUCTION Furniture FURNITURE PRODUCT SPECIALISATION Kithen furniture

THE COMPANY IS PART OF Gruppo Industriale Lube/Lube Group

YEAR OF ESTABLISHMENT 1967 EMPLOYEES 470 TURNOVER USD 163.6 million

## History

Cucine Lube spa, based in Treia, Italy, is a manufacturing company.

Lube Group ranks as one of the top Italian kitchen manufacturers. The company was established in 1967 and in 1974, after having expanded, it became "Lube cucine componibili". In 1993 a new company was formed, which is today the Lube Group.

In 1995 Lube founded the company La Faer Ambienti, active in the bedroom and living room market in order to diversify its activity.

In 2003 Cucine Lube Over spa was incorporated into Lube Holding S.r.l. which has headed the Lube Group since 2004.

## Financial Highlights

In 2006 Lube cucine recorded a total turnover of USD 163.6 million (+9.4% on 2005).

The company is present primarily on the European market including Spain, Portugal and Greece and also in Russia, the USA, China and the Middle East.

## Manufacturing process

Today the heart of the company is a modern factory, which covers an area of 79,000 sqm, of which 59,000 sqm are covered and is the work place of over 350 employees.

## Marketing

The company brands in the kitchen segment include Cucine Lube, Heral Cucine, Cucinexport and Borgo Antico. These brands are controlled by the company Cucine Lube S.r.l. which manufactures kitchen furniture and sells 75% under the Cucine Lube brand name, and the remaining 25% is sold to the companies Heral Cucine and Cucinexport srl.

## Distribution channels

Today the company has sales outlets in every Italian region, amounting to over 1,500 in total.

## Certification

In 2000 the company was ISO 9001 certified.