Symbola
FONDAZIONE PER LE QUALITÀ ITALIANE

ITALY IN 10 SELFIES. 2017

THE ROOTS OF THE FUTURE AND THE CHALLENGE OF CLIMATE CHANGE

Amateurs play for fun in fair weather.
Professionals play to win in the teeth of torments.

Frank Capra

The world is facing difficult challenges, from economic crises to climate change, from conflict to migratory flows. Italy must confront them within Europe with all its specific weaknesses and ancient evils: not only public debt, but also wealth inequality, lack of employment, the burden of the mafia and corruption, bureaucracy that is often stifling, and the South losing touch with the rest of the country.

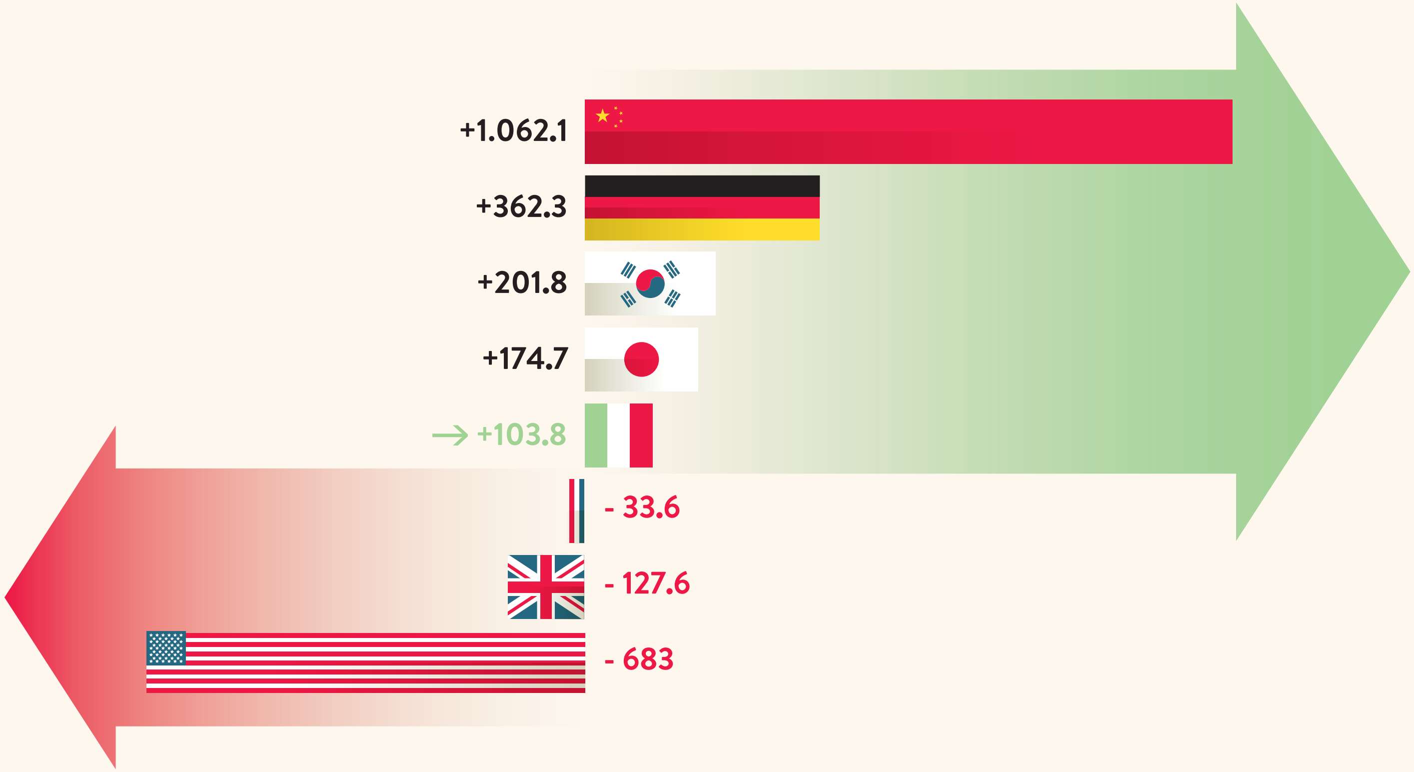
It is therefore even more important to start from our strengths. From an Italy that can look to the future with confidence because it does not disown its soul. A competitive Italy thanks to social cohesion, care about human capital and a strong relationship with districts and communities. Italy can be an outpost of the stronger, more sustainable, more human-scale economics that emerged from the Paris Agreement on climate, confirmed at the COP22 in Marrakech. Of what we read in the hopes of Pope Francis. Of an economy that can provide adequate response to the new demands of 21st century global consumers: equity, sustainability and beauty. Precisely for this reason, it is a great opportunity for our country.

This is the Italy that Symbola tries to read and illustrate along with many other travellers, who share the empathy with which we view the country, with its problems and its many talents: starting with Unioncamere and Fondazione Edison, Coldiretti, Enel, Legambiente, Aaster, Aiccon, CNA, Ucina, Ucimu, FederlegnoArredo, Federparchi, Farmindustria, Fondazione Fitzcarraldo, Unaprol and Crea, and many other players and minds.

The Italy photographed through new eyes and with the precision of numbers in these 10 selfies can navigate even in uncertain waters and has a voice to speak for itself about the decisive topics of the future agenda. Such as those linked to a more sustainable, human-scale and this more competitive economy, which is able to meet the challenge of climate change.

After all, as Edison, a man who truly knew about challenges, wrote, “if we did all the things we are capable of, we would literally astound ourselves.”

ERMETE REALACCI
Presidente Fondazione Symbola



ITALY IS ONE OF **FIVE COUNTRIES** THAT BOASTS A **MANUFACTURING SURPLUS OF OVER 100 BN DOLLARS**

01.

In 2015, with a manufacturing trade surplus with other countries of $103.8 bn, we were fifth in the world after China (1,062.1 bn), Germany (362.3 bn), South Korea (201.8 bn) and Japan (174.7 bn).
This consolidates Italy's leading role in global industry and our companies' ability to compete in global markets.
The same cannot be said for countries like France (-33.6 bn), the UK (-127.6 bn) and the USA (-683 bn).

Countries by manufacturing trade surplus – G20 countries, 2015, bn of $

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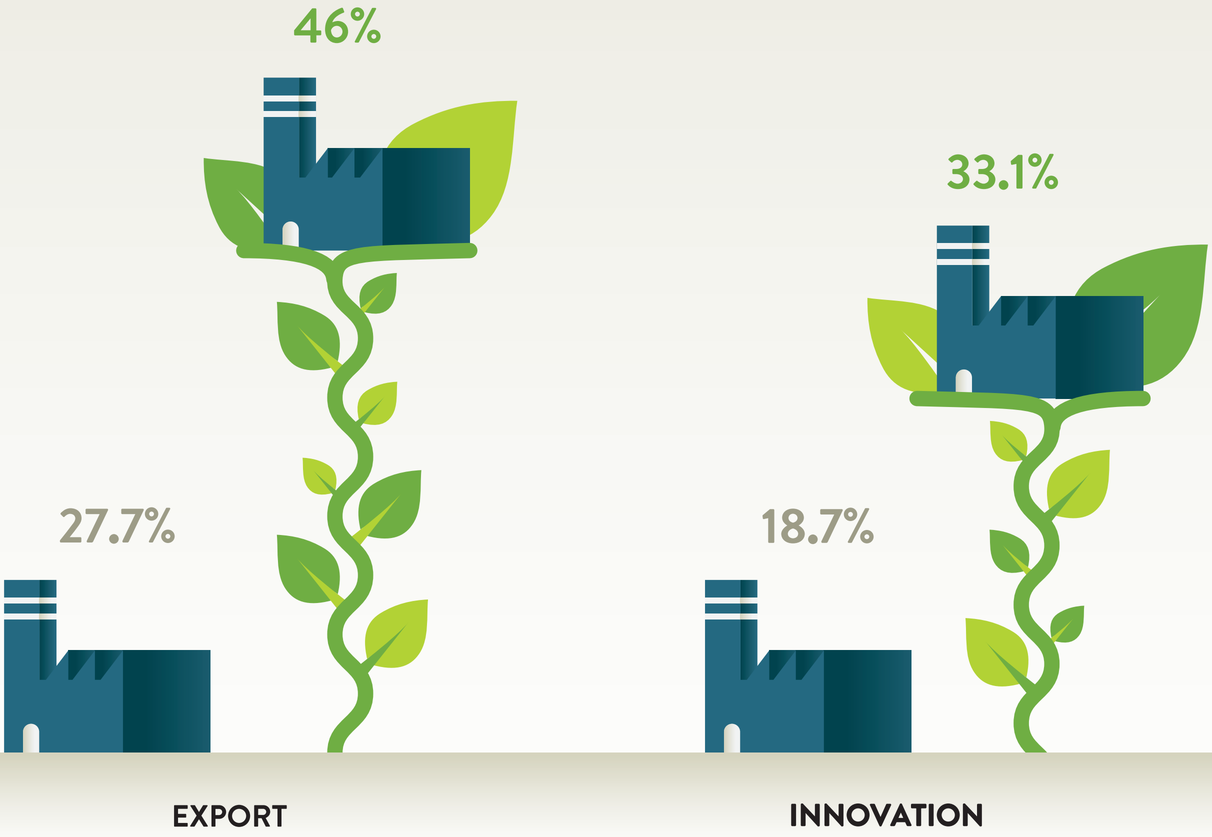

THE **GREEN ECONOMY** STRENGTHENS **ITALIAN COMPANIES**

During the financial crisis, over 385,000 Italian companies (26.5% of all industry and services, 33% of manufactures) bet on the green economy, which is worth €190.5 bn of added value, 13% of the national economy. With competitive advantages in terms of exports (46% of eco-investing manufacturers have steady exports, compared to 27.7% of other manufacturers), innovation (33.1% have developed new products or new services, compared to 18.7%) and turnover (35.1% of green companies have grown in 2015, compared to 21.8%).
The green economy is also good for employment. In 2016, eco-investing companies employed more people: 330,000 employees, accounting for 43.9% of total seasonal and non-seasonal recruitments expected in industry and services in the current year. 66% of total recruitments in research and development were by eco-investing companies: a clear sign of the close relationship between green economy, innovation and competitiveness.

02.

Competitive advantages of manufacturing companies that have made green investments between 2010 and 2016 (percentage shares of total companies)

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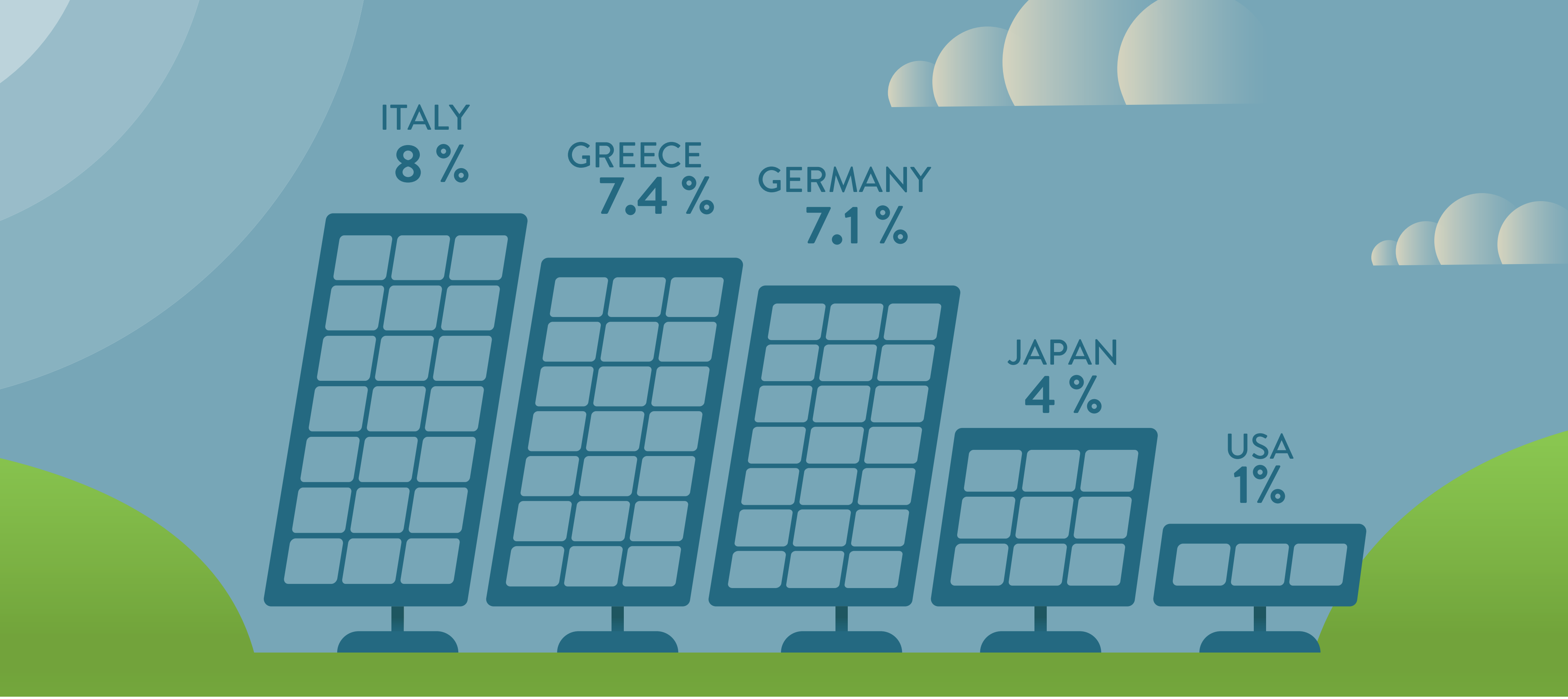

FIRST IN THE WORLD FOR **PHOTOVOLTAICS**

03.

Italy is the global leader for its photovoltaic contribution into the national electricity mix (8% in 2015), ahead of Greece (7.4%), and Germany (7.1%), as well as countries like Japan (below 4%) and the USA (less than 1%).
It is first among the large EU countries for share of renewable energy in gross domestic consumption (17.1%) – this figure has almost tripled in the 2004-2014 decade, starting from 6.3% – followed by Spain (16.2%), France (14.3%), Germany (13.8%) and the UK (7%).

Photovoltaic production share of the total electricity produced in 2015

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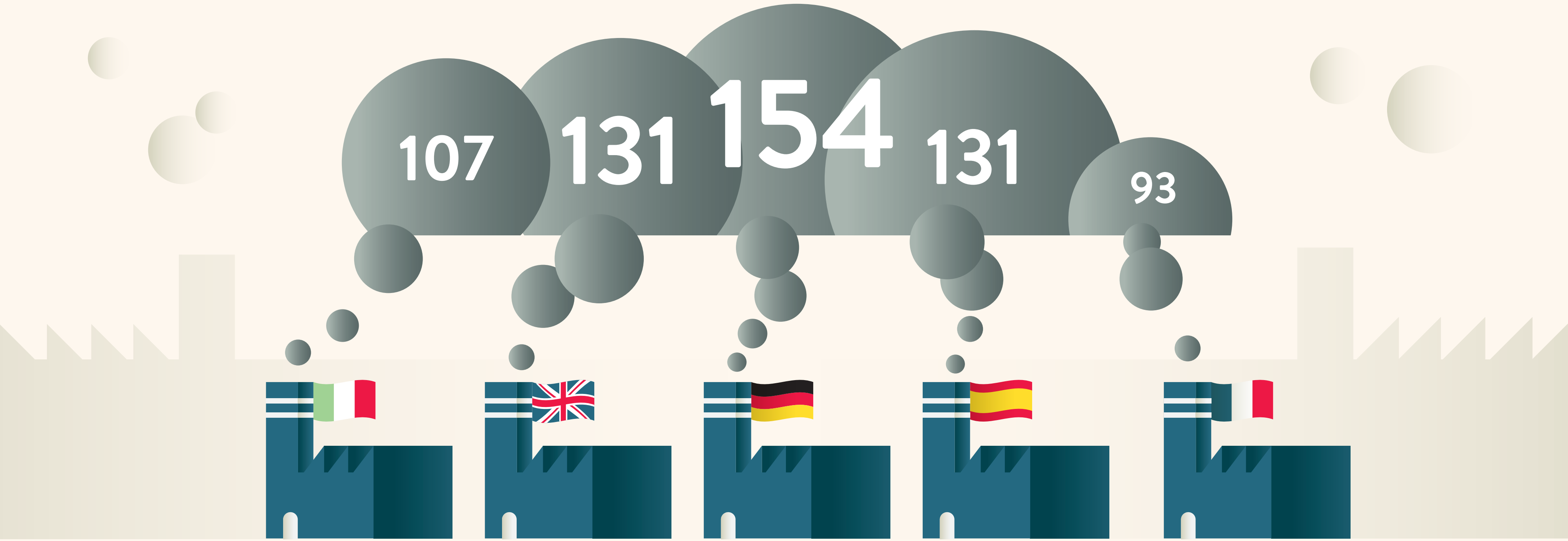

EUROPEAN LEADER IN **ENERGY EFFICIENCY** AND **EMISSIONS**

04.

The Italian production model is one of the most innovative and efficient in environmental terms. Starting from energy consumption and polluting emissions: with 107 tons of CO_2 equivalent per million euro produced, we have the second lowest intensity of atmospheric emissions, behind France (93, helped in this case by nuclear energy) and ahead of Spain (131), the UK (131) and Germany (154).
With 14.3 tons of oil equivalent per million euro produced, Italy is second among the five major EU economies for lowest energy input to produce equal product, after the UK (11.6, although the UK has an economy based more on finance than manufacturing) and ahead of France (14.5), Spain (16.8) and Germany (17.7).

Tons of CO_2 equivalent for every €1 bn of products, 2013

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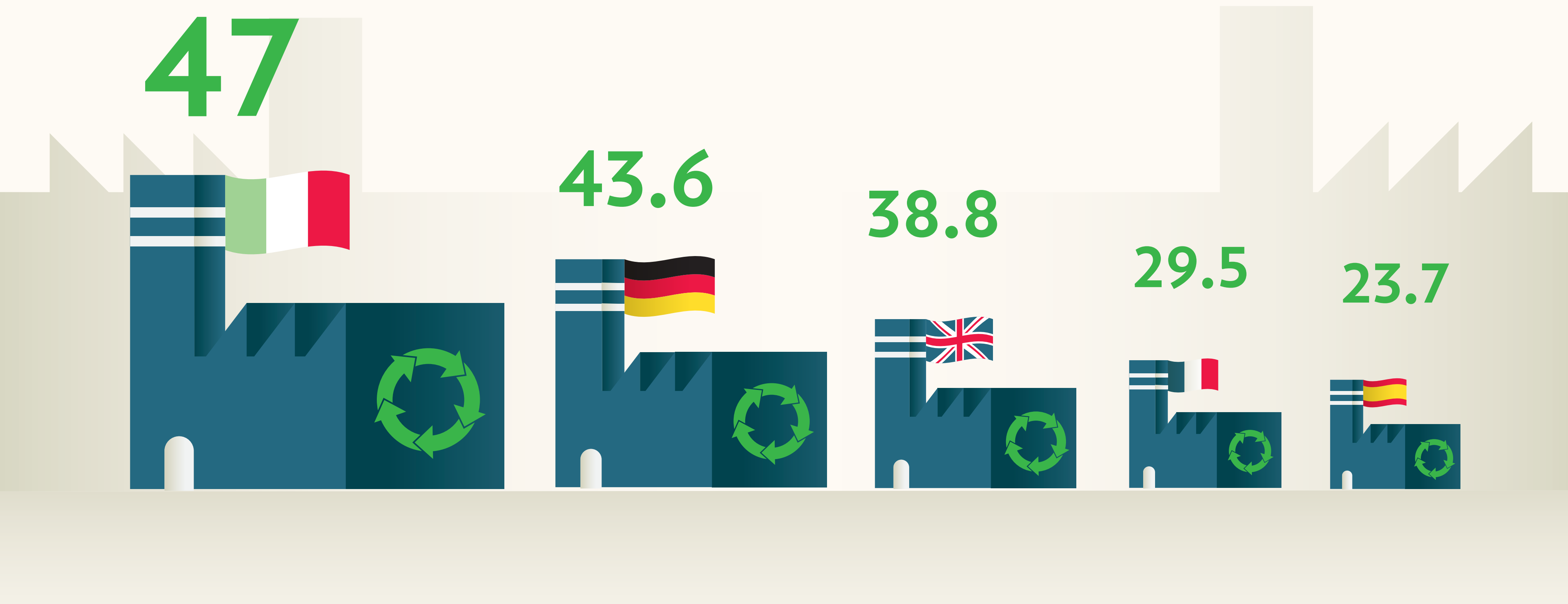

FIRST IN **EUROPE** IN THE **CIRCULAR ECONOMY**

05.

Non-hazardous waste sent for recycling in major European countries, 2012, bn of tons

Italy is the European leader in industrial recycling: 47 bn tons of non-hazardous waste was recovered for recycling, the highest figure among all European countries, followed by Germany with 43.6, the UK with 38.8, France with 29.5 and Spain with 23.7
Recycling in industrial production cycles has allowed us to save primary energy for over 17 bn tons of oil equivalent and emissions for around 60 bn tons of CO_2.

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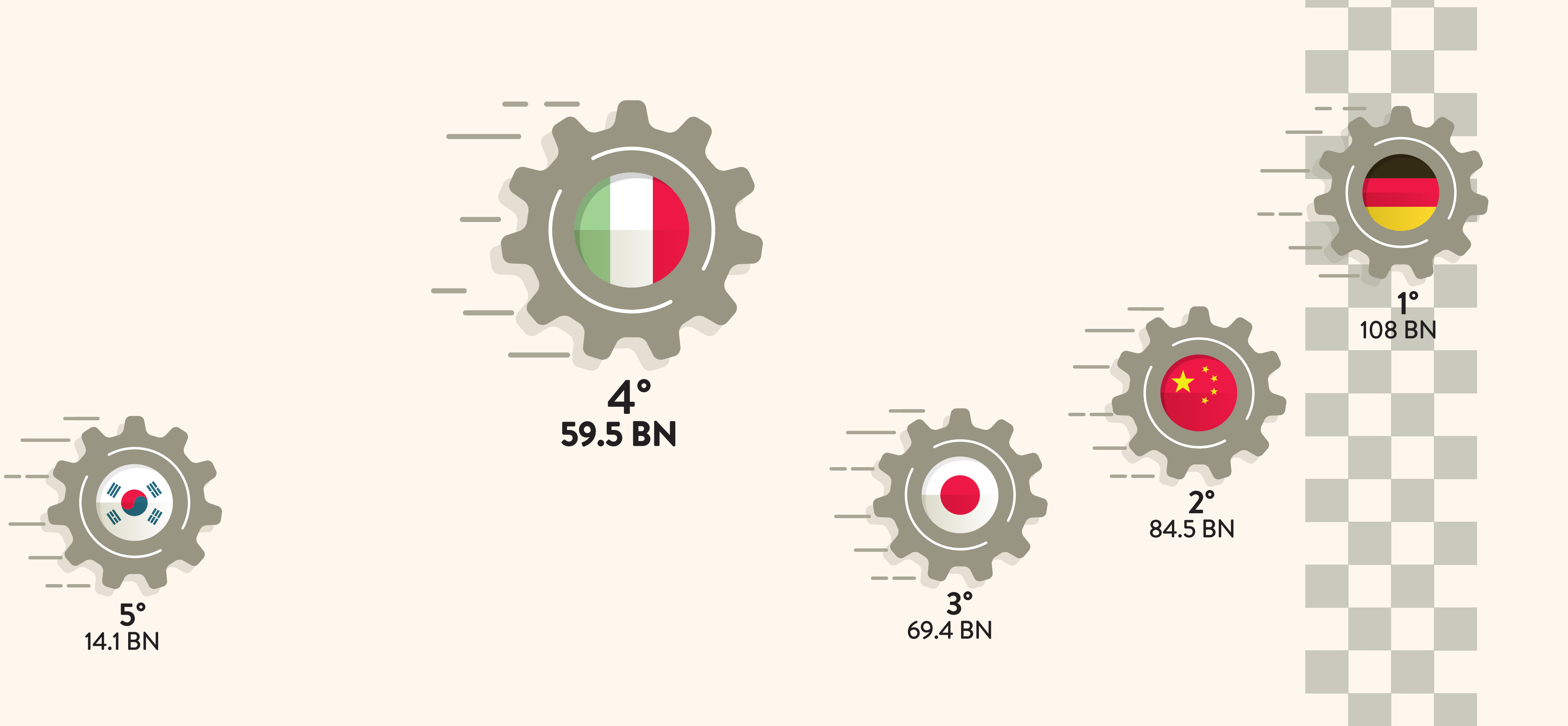

ITALIAN INDUSTRY IS **FOURTH** FOR **MACHINERY SURPLUS**

06.

With a $59.5 bn surplus, the Italian machinery industry is one of the leaders in the international trade balance ranking, preceded by its German (108 bn), Chinese (84.5 bn) and Japanese (69.4 bn) competitors.

Among the most exported products are machines for agriculture, tobacco, the food industry, for working wood, metal, plastic materials and non-metallic minerals (ornamental stones and ceramic, for example), for wrapping and carousel machines, particularly appreciated for their lower power consumption with equal performance.

Non-electronic machinery: net exports, 2015, bn of $

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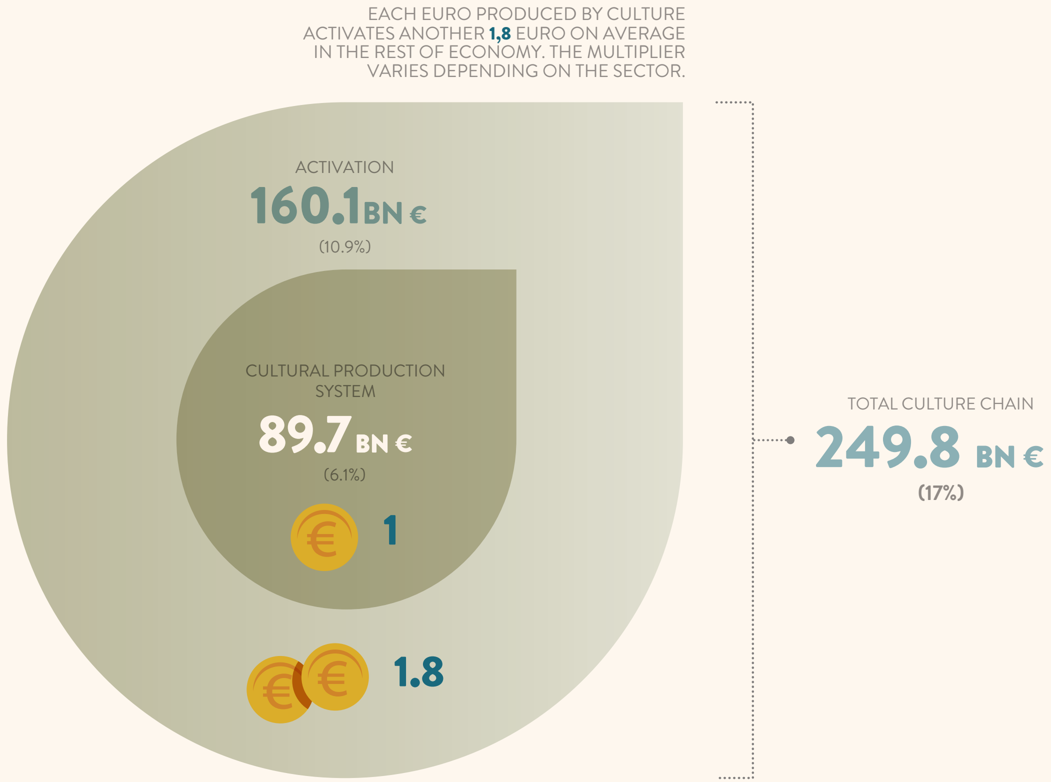
FONTE | **International Trade Centre, UNCTAD/WTO**



CULTURE, **BEAUTY** AND **CREATIVITY** TO COMPETE. **FIRST** FOR **UNESCO SITES**

07.

Italy owes €89.7 bn, 6.1% of the wealth produced in the country in 2015, to its culture industry. This nearly 90 bn sets in motion another 160.1 bn in the rest of the economy: €1.8 for every €1 produced by culture.
Thus 249.8 bn is produced by the entire cultural industry, from design to Made in Italy, from new media to cultural and historical heritage to tourism: 17% of national wealth.
Culture and creativity provides work for 6.1% of people in employment, 1.5 m people.
Italy is the world leader for number of UNESCO sites: 51 sites are recognized in our country.

The added value of the cultural and creative sector (businesses, institutions, non-profits).
Multiplying effect on the rest of the economy, 2015

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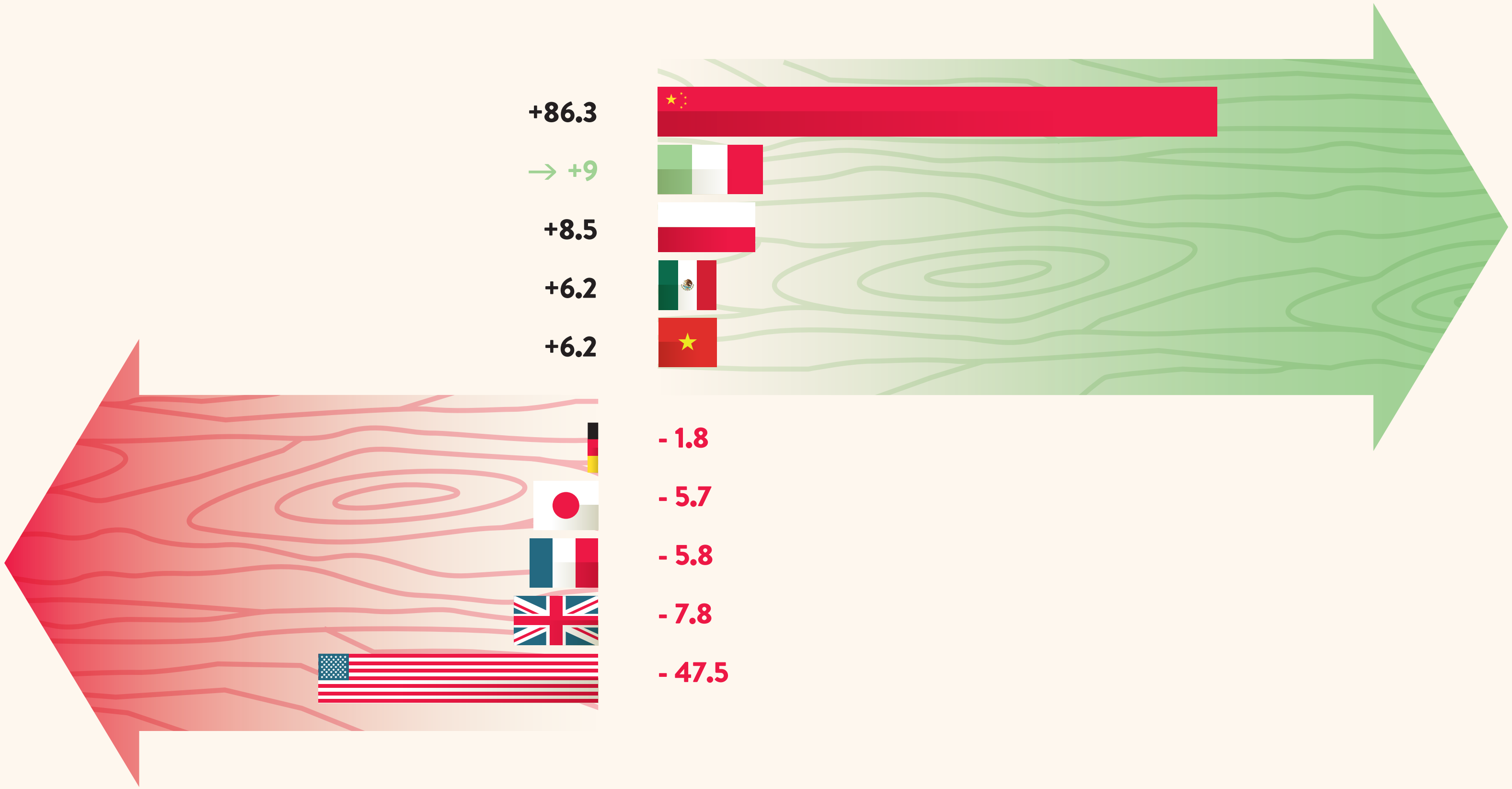

THE ITALIAN WOOD FURNITURE INDUSTRY IS SECOND FOR **TRADE SURPLUS.** **A CHAMPION OF SUSTAINABILITY**

With a $9 bn surplus, the Italian wood furniture industry is second in the world in terms of trade balance, preceded only by China (86.3 bn), but ahead of its Polish (8.5 bn), Mexican and Vietnamese (6.2 bn) and German (- 1.8 bn) competitors. The leading importer of Made in Italy wood furniture products is France (€1.061 bn in 2015), followed by Germany (844 bn), the UK (719 bn), Switzerland (555 bn), Russia (527 bn), Spain (407 bn), the UAE (295 bn), China (288 bn, where Italy is the leading national supplier), Saudi Arabia (272 bn) and Austria (265 bn).
The Made in Italy wood furniture industry is at the forefront of environmental sustainability.
Starting with energy consumption: our companies use 30 ton of oil equivalent (toe) for every million euro produced, compared to an EU average of 68 (the UK consumes 39, France 56, Germany 63 and Spain 101). And with emissions: with 39 ton of CO_2 equivalent per million euro, compared to 50 in Germany, 52 in France, 93 in the UK and 124 in Spain.

08.

Trade balance of the wood furniture industry (of 37 internationally surveyed products), 2014, bn of $

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ITALIAN COMPANIES ARE AMONG THE **MOST COMPETITIVE**

09.

Of a total of 5,117 products – the highest level of statistical breakdown of world trade – in 2014 Italy placed first, second or third in the world for trade surplus with foreign countries in 899: almost one in five. For a total value of $200 bn.

Made in Italy products have highly diversified specifications, focused especially on the '4A' macro-sectors (Food-wine, Clothes-fashion, Furniture-home and Plastic-rubber-mechanical-automation).

Products in which Italy holds first place in in the world for trade surplus, 2014 (Fortis-Corradini Index, Edison Foundation©)

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FOR **68 PRODUCTS**, OUR COUNTRY IS THE **LEADER** IN HIGH-QUALITY **AGRI-FOOD** OUR MOST **SUSTAINABLE** AND **SAFE** AGRICULTURE

Among Italian agri-food products, 16 hold first place in the international markets. From pasta to tomatoes to other vegetables, from vinegar and oil to beans: all absolute champions in the global market share. And there are 52 others for which we are second or third: in short, we are on the world trade podium for 68 products.
Italy is the strongest country in the world for 'distinctive' products: first in food, with 290 PDO/PGI/TSG foods, and in wine, with 523 DOC/DOCG/IGT. Italy ranks second in Europe for organic agricultural land (which rose by 7.5% in 2015 over 2014). And first for number of companies in the sector. And we are also a world leader in food safety, with the lowest number of agri-food products with chemical residues (0.3%), a share that is 5 times lower compared to the European average (1.5%) and almost 20 times lower than that of non-EU products (5.7%)

10.

Agri-food products for which Italy holds first place in terms of market share, 2014

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FONTE | *Focus sul settore agroalimentare*, Fondazione Symbola, Unioncamere, Fondazione Edison, Coldiretti *GreenItaly*, Fondazione Symbola e Unioncamere

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