

2023

Italy in 10 Selfies

A human-centered economy that helps build the future

PREPARED BY

SYMBOLA

Fondazione per le qualità italiane

UNDER THE PATRONAGE OF



Ministero degli Affari Esteri
e della Cooperazione Internazionale



MINISTERO DELL'AMBIENTE
E DELLA SICUREZZA ENERGETICA



Ministero delle Imprese
e del Made in Italy

IN COOPERATION WITH



UNIONCAMERE



ASSOCAMERESTERO
ASSOCIAZIONE DELLE CAMERE DI
COMMERCIO ITALIANE ALL'ESTERO

OUR GRATITUDE GOES TO

ADI – Industrial Design Association, ANIMA, Assosport, Coldiretti, Confindustria Dispositivi Medici, Confindustria Moda, Confindustria Nautica, Deloitte, Enel, FederDOC, Fondazione Qualivita, Ismea, Simonelli Group, Sistema Moda Italia

*The color used this year for the cover of Italy in 10 Selfies is PANTONE 18-1750 Viva Magenta, a natural shade from red color range that delivers a message of joy and optimism.
The color created from scratch by the Pantone Color Institute for 2023 expresses power and encourages living a life without limits, it is an unconventional color for an unconventional era.*

“Since the Middle Ages, Italians have been accustomed to producing beautiful things that the world likes in the shadow of bell towers”.

Carlo M. Cipolla

“Things are united by invisible bonds. You cannot pick a flower without disturbing a star”.

Galileo Galilei

Ongoing crises sometimes seem to turn back the clock in international relations, economics, and rights.

“Italy in 10 Selfies” every year tells about some of the country’s records, often little-known or underestimated ones, that determine the features of an economy that is more human-oriented and, therefore, more promising for the future. The work provides data that highlights how, thanks to the process of qualitative transformation of the national production system that is fueled by relations with communities and territories, innovation, environmental friendliness, and beauty have increased the value of our products and their competitiveness in exports. This trend may be noticed in many fields, from those described on the following pages to space technologies, where Italy is the third in the world in terms of specialization ratio and the first in Europe in areas related to Earth observation, technologies aimed to reduce the use of raw materials and energy in production, cosmetics. 55% of the world’s cosmetics are made in Italy. Italy’s largest steel producer, Arvedi, is the world’s first steel mill certificated with zero net carbon dioxide emissions.

It is in Italy that the largest plant in Europe for the production of photovoltaic modules will be built by Enel. Talents that help to understand the good performance of the national economy, often better than that of other countries, and talents with whose help we can deal not only with our ancient evils, but also with the challenges we face today. Starting with the climate crisis. We must do this by strengthening the path of cooperation and peace on Earth that has recently weakened. To build a safer, more civilized, kinder world together, without leaving anyone behind, without leaving anyone alone.

Behind these 10 records, we can see a country that forms exactly the Italy that Fondazione Symbola tells about in its researches conducted together with numerous companions who share with us the idea of the future.

ERMETE REALACCI

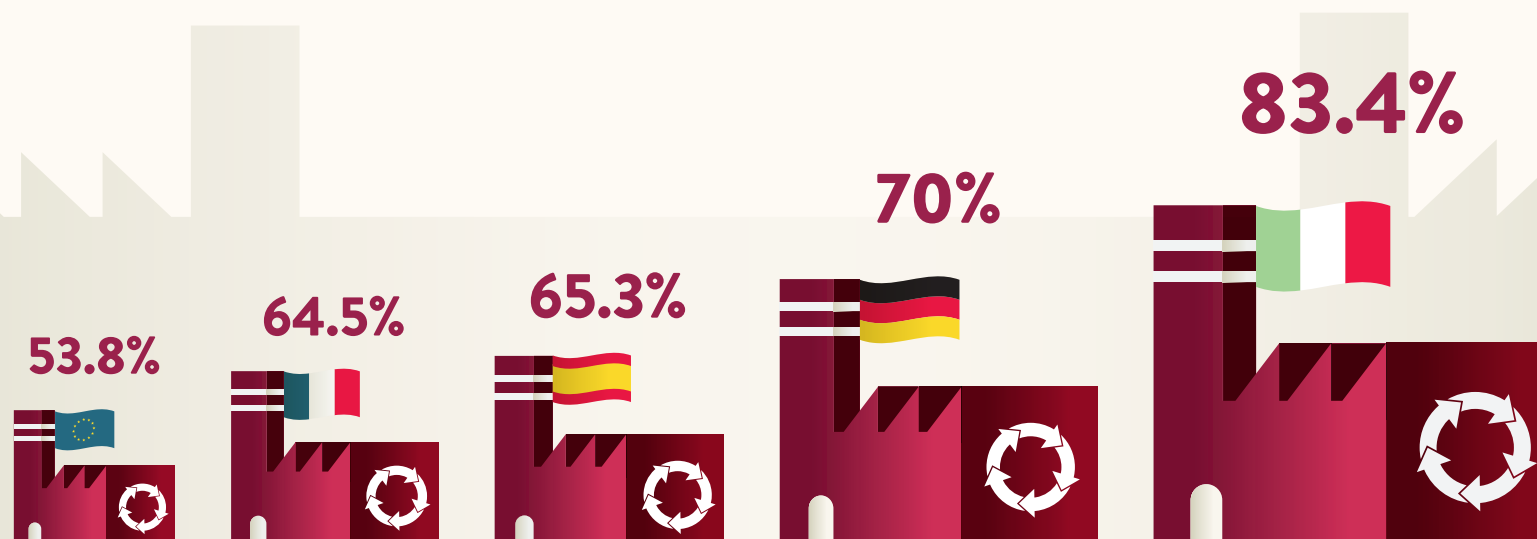
President of the Fondazione Symbola

2023

Italy in 10 selfies

A human-centered economy that helps build the future

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A LEADER IN THE CIRCULAR ECONOMY

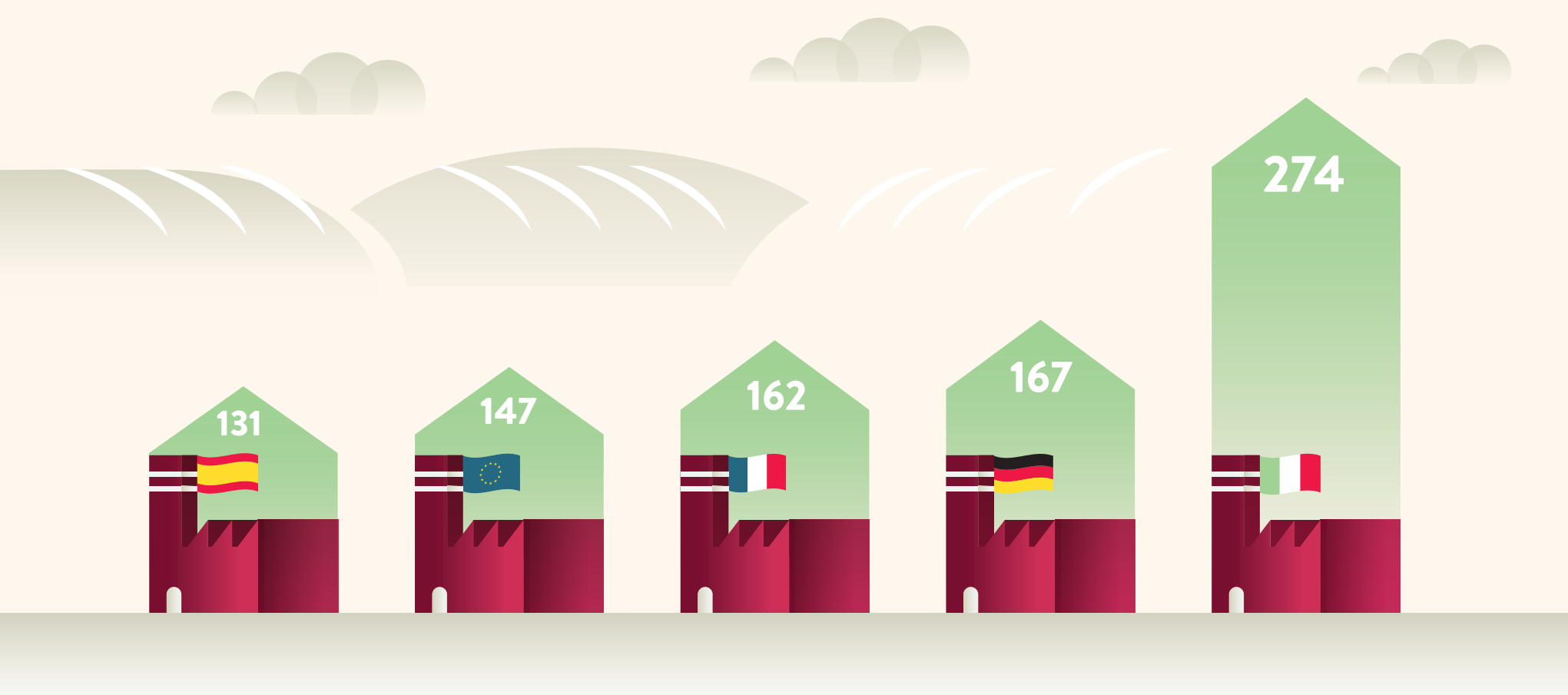
Italy is the European country with the highest recycling rate of the total volume of special and urban waste produced (83.4%), which is higher than the average rate in Europe (53.8%), Germany (70%), France (64.5%) and Spain (65.3%). We are second after France in terms of the use of secondary raw materials – the share of secondary raw materials in the total amount of raw materials used is 21.6% (+55% compared to 2012), while the European average is 12.8%.¹ During the disposal of waste from oil processing, the reproduction rate reached 98% in 2021 in Italy (61% in Europe)¹, and for steel, the recycling rate was 82% in 2020 (55.7% in the EU and 28.62% globally).² Thanks to the use of secondary raw materials as a substitute of raw material, 23 million tons of oil equivalent and 63 million tons of CO₂ equivalent are avoided in Italy every year.¹

01.

Recycling rate of the total amount of urban and special waste in large European countries, 2020, latest available data (percentage values)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023

SOURCE | ¹ *GreenItaly 2022*, Fondazione Symbola and Unioncamere; ² BIR, Bureau of International Recycling



GREEN ENTERPRISES ARE GROWING AND BECOMING EFFICIENCY CHAMPIONS

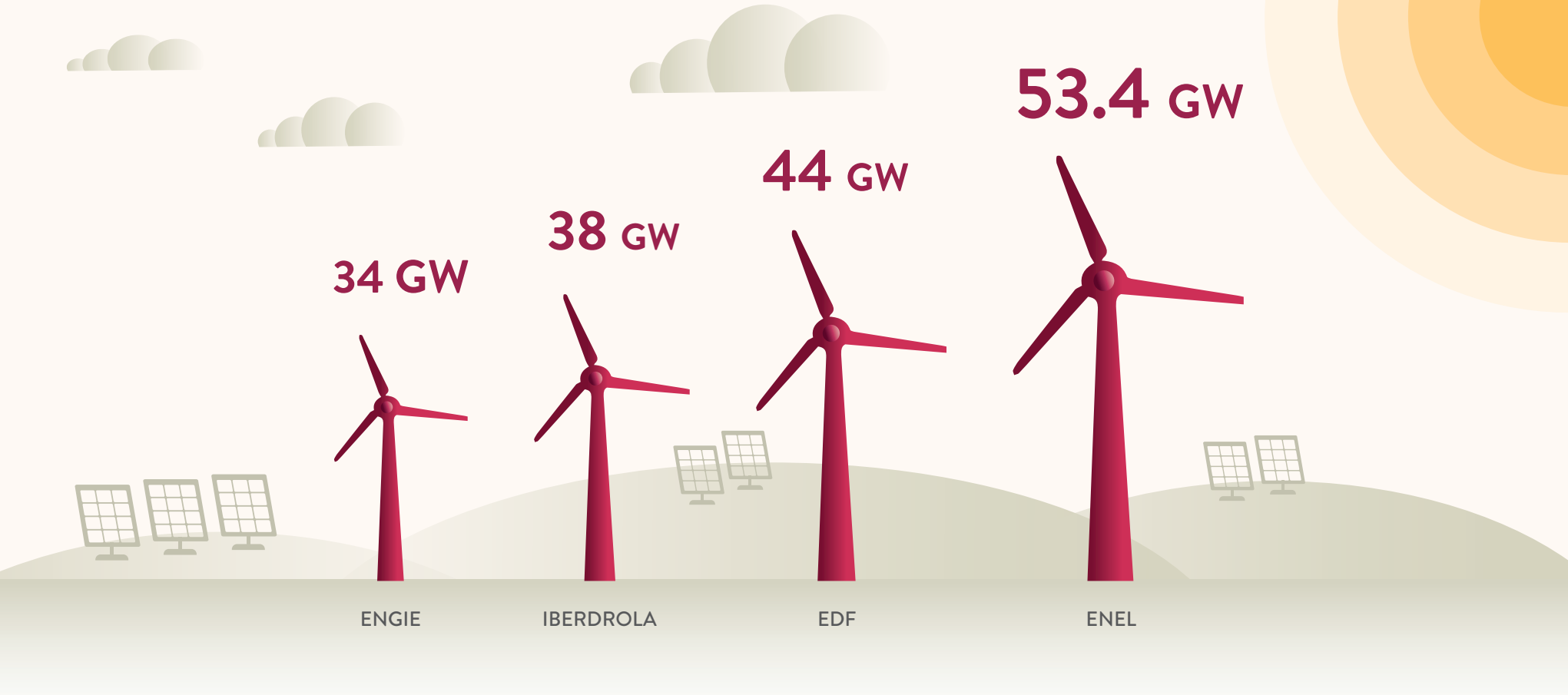
With a score of 274 points out of 300, Italy ranks first in Europe in terms of resource efficiency. It's a composite indicator that highlights the ability to produce goods while reducing the use of raw materials, water, energy and the intensity of GHG emissions. The indicator is higher than the average for the EU (147 points), Germany (167), France (162) and Spain (131).

Between 2012 and 2021, Italy increased the productivity of the use of raw materials from 161 points to 269, against an EU average of 151.¹ Over the past five years, more than one out of 3 non-agricultural enterprises (531,170 units) in Italy have made eco-investments. These enterprises are growing more, exporting more products, creating more jobs.²

02.

Assessment of the efficiency of resource use by large European countries in accordance with the Environmental Innovation Index 2022, 2021 (absolute values)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023
SOURCE | ¹ European Commission; ² GreenItaly 2022, Fondazione Symbola and Unioncamere



THE WORLD'S **LARGEST** OPERATOR IN THE RENEWABLE ENERGY SECTOR **IS IN ITALY**

Enel is the world's largest private company in the renewable energy sector with a capacity of 53.4 GW in 2021 that is coming from wind, solar, geothermal and hydroelectric power plants located in Europe, America, Africa, Asia and Oceania. For 2022, the final estimate is 59 GW, which is equal to 67% of the total production. As of December 31, 2022, Enel's market capitalization stood at \$51.1 billion. The continued commitment of Enel to environmental development issues is evidenced by its recognition among the leaders in the main ESG ratings, such as Dow Jones Sustainability World Index and MSCI World ESG Leaders. Enel is currently building the largest photovoltaic module manufacturing plant in Europe in Catania. It will have a production capacity of 3 GW per year, which is more than the whole of Europe produces today.

03.

Power produced in 2021 (in Gigawatts)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023

SOURCE | Official publications of companies for 2021 and Enel estimates for 2022

47.5 billion euros 47.8 billion euros 52.8 billion euros 66.6 billion euros 347 billion euros



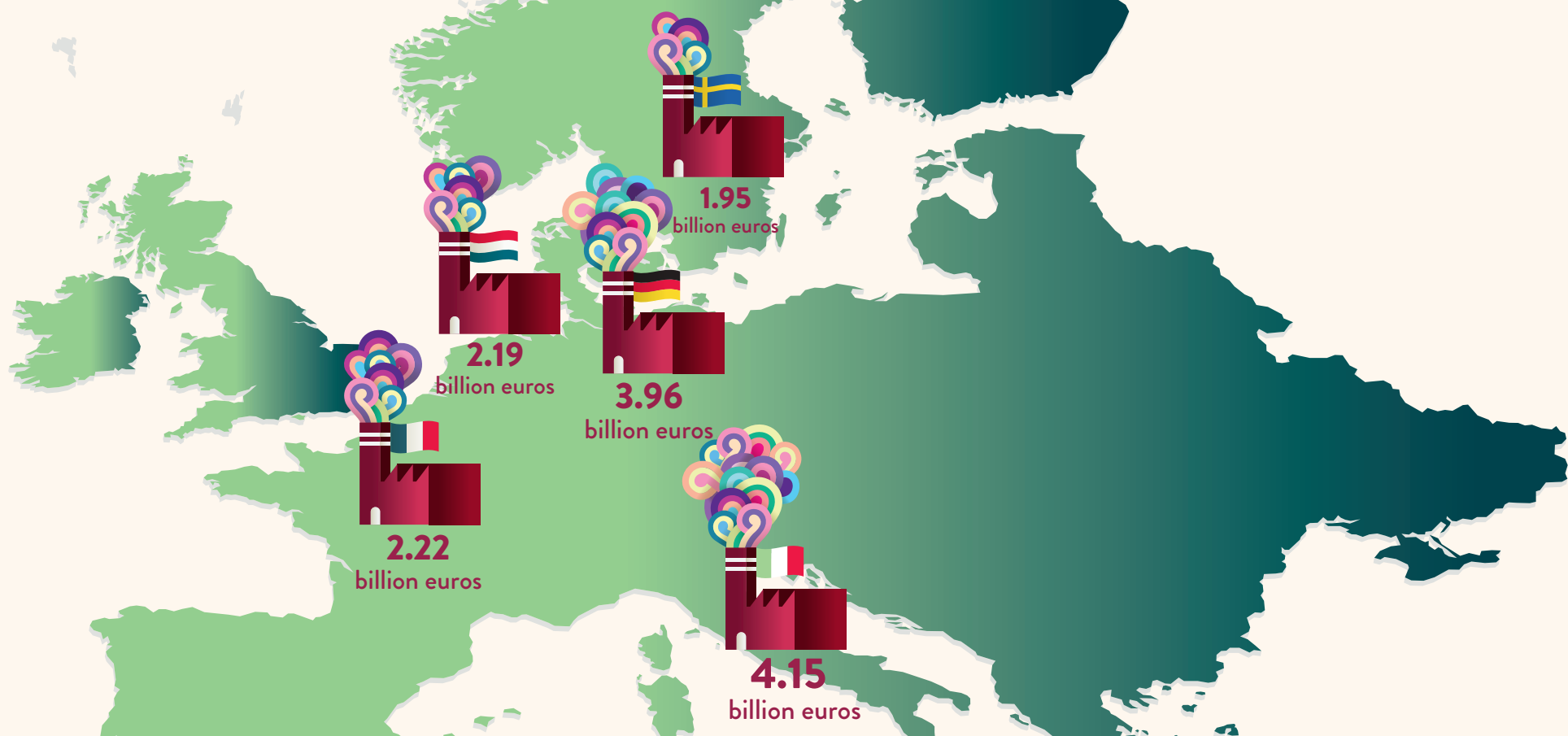
FASHION: ITALY RANKS **SECOND** IN THE **WORLD** AND **FIRST** IN **EUROPE** IN TERMS OF **EXPORT**

Italy is the first exporter of textile, fashion products and accessories (TFA) in the EU and the second in the world after China (347 billion euros) with an export amount of 66.6 billion euros, ahead of Vietnam (52.8 billion euros), India (47.8 billion euros) and Germany (47.5 billion euros). In 2021, Italy recorded a surplus of 33.2 billion euros. Fashion is the second sector for contribution to Italy's trade balance, with an export propensity of about 75% of turnover.¹ In the TFA sector, Italy is the first EU country both in terms of value added and the number of employed. Indeed, 26.3% of European workers in this sector are Italians (every fourth), then go Portugal (9.7%), Poland (9.3%), Romania (8.8%), and Germany (8.1%).² It is expected that the final turnover of TFA in Italy in 2022 will be 108.2 billion euros, +16.9% in 2021 and +10.4% in 2019.³

04.

The amount of exports of the leading Textile, Fashion and Accessory Exporting Countries 2021 (billions of euros)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023
SOURCE | ¹Elaborations of Confindustria Moda according to Istat, Eurostat and ITC-Trade Map data; ²Elaborations of Confindustria Moda based on Eurostat 2020 data; ³Indagine Rapida congiunturale anno 2022, Confindustria Moda



THE FIRST IN EUROPE IN THE FIELD OF **DESIGN**, BEAUTY IS THE KEY TO **MADE IN ITALY** AND SUSTAINABILITY

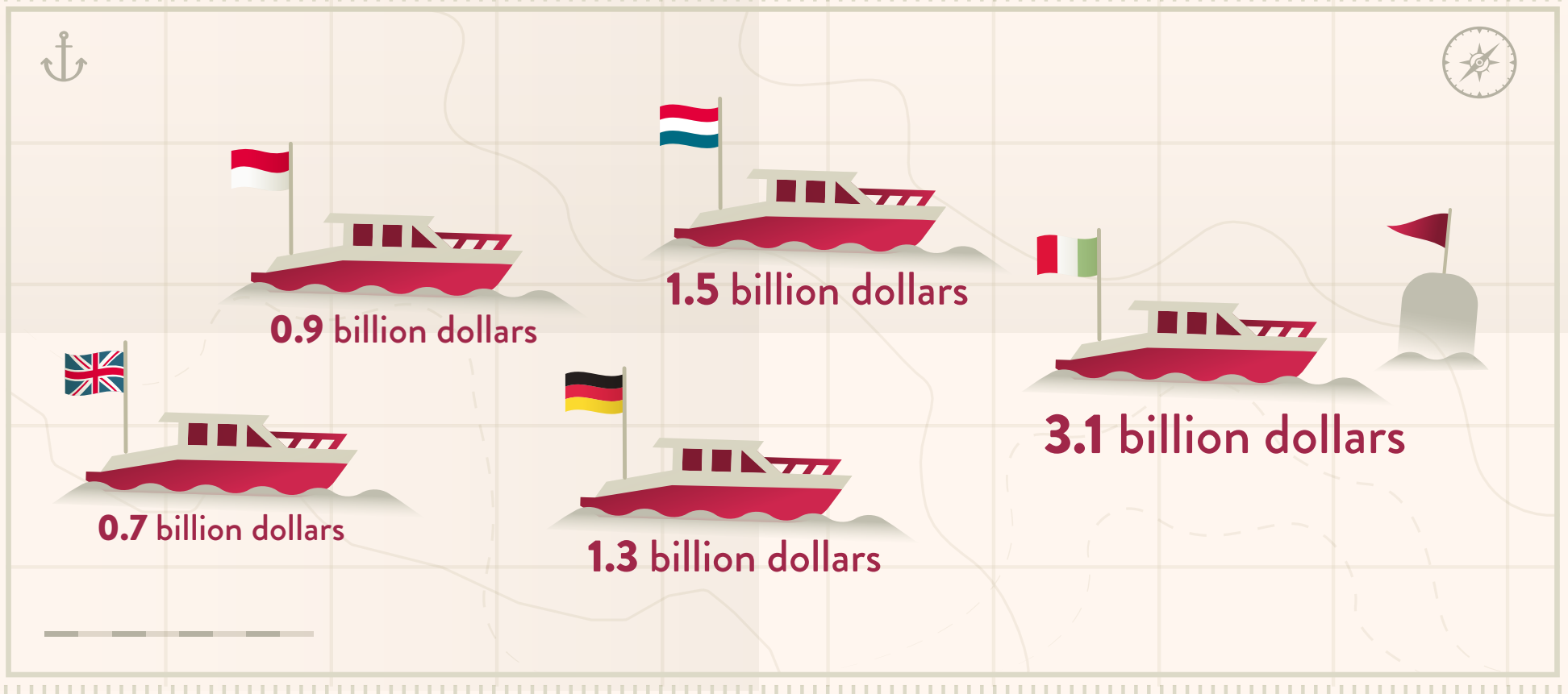
Italy ranks first in Europe in terms of turnover in the design sector with 4.15 billion euros (19.9% of the total EU volume), followed by Germany (3.96 billion euros), France (2.22 billion euros), the Netherlands (2.19 billion euros) and Sweden (1.95 billion euros). This confirms the primacy among large EU countries in the number of enterprises - 36,131 organizations (16.2%) are spread throughout the national territory to create a real “infrastructure” of Made in Italy. Every fifth current employee in Europe in this sector is Italian (54,284 workers, which is 19.1% of the total number in the EU). The world’s largest event dedicated to design, Salone del Mobile in Milan, which was held this year for the 61st time, is Italian. Design and beauty are the key to Made in Italy.

05.

Turnover of design sector of EU countries, 2020
(billions of euros)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023

SOURCE | *Design economy 2023*, Fondazione Symbola,
Deloitte, ADI, PoliDesign



ITALIAN **SHIPBUILDING** IS THE FIRST IN THE WORLD IN TERMS OF TRADE BALANCE

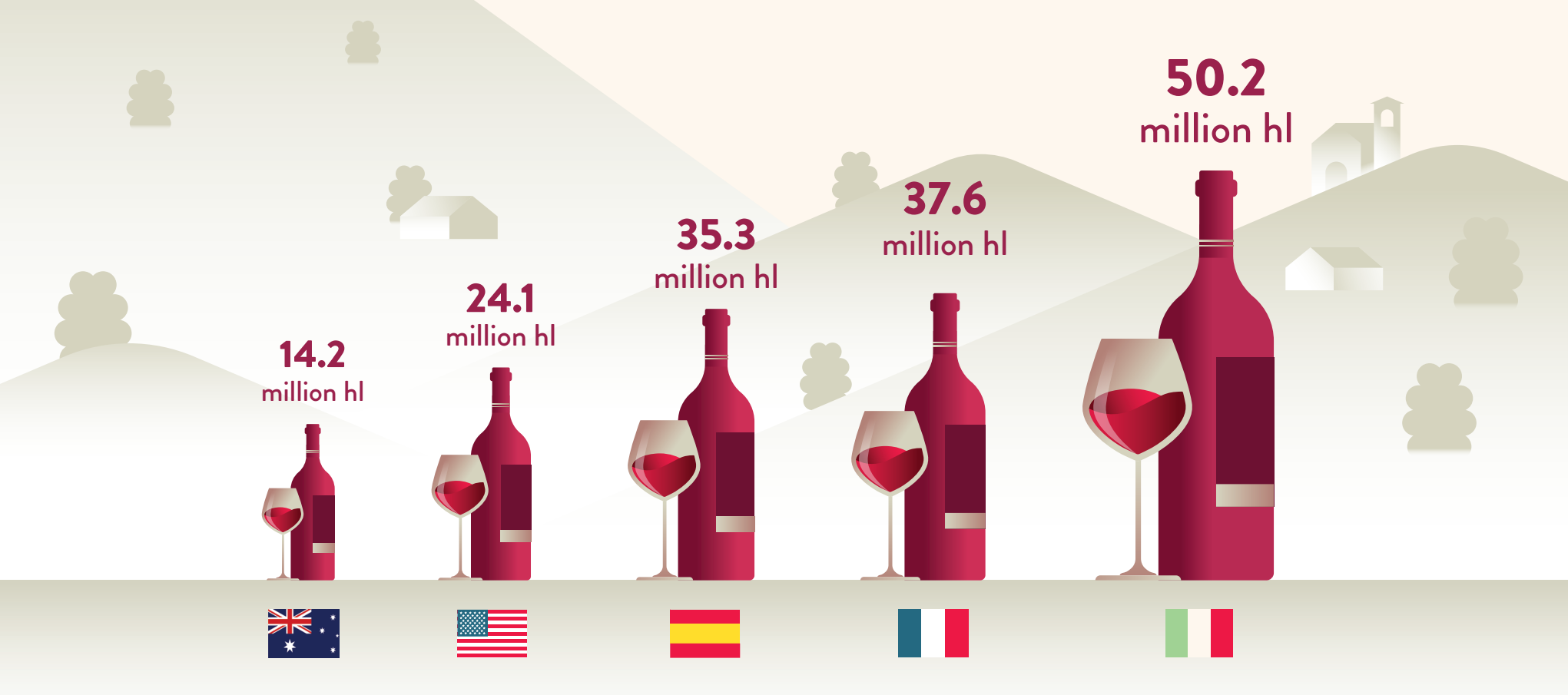
Italy ranks first in the world in terms of the trade balance in the shipbuilding sector worth \$3.1 billion (+\$1 billion since 2020), followed by the Netherlands (\$1.5 billion), Germany (\$1.3 billion), Poland (\$0.9 billion) and the United Kingdom (\$0.7 billion). Italy also takes first place for the balance in the sector of pleasure or sports yachts and vessels with an inboard engine in the amount of \$3.04 billion, followed by the Netherlands (\$1.46 billion).¹ As for the superyacht category, as of December 31, 2022, the volume of orders in Italy amounted to 49.3% of the total number in the world (593 in absolute terms), which is 13% more than in the previous year.²

06.

Trade balance of the leading countries in the field of shipbuilding for 2021 (billions of US dollars)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023

SOURCE | ¹ Elaborations of Fondazione Edison on UN Comtrade data; ² Elaborations of Confindustria nautica on Boat International data



ITALY IS **THE WORLD LEADER** IN THE PRODUCTION OF **WINE AND CERTIFIED PRODUCTS**

In 2021, Italy upholds world leadership in wine production (50.2 million hl), ahead of France (37.6) and Spain (35.3); the result is also achieved thanks to 526 categories of PDO (Protected Designation of Origin) and PGI (Protected Geographical Indication), which account for 55% of production. 2021 was a record year for the export of Italian wine with a turnover of 7.1 billion euros (+12.4% since 2020), which is 14% of exports of agri-food products.¹ In Italy, 109,423 hectares (2019) of agricultural land are intended for vineyards, 98% of which are vineyards for wine.² The country is the first in Europe and the world in terms of the number of certified products included in the categories PDO, PGI, TSG (Traditional Speciality Guaranteed): 881 geographical indications, including 526 wines, 320 products and 35 alcoholic beverages.³

07.

Wine production, 2021, (millions of hectoliters)

FONDAZIONE SYMBOLA, *ITALY IN 10 SELFIES. 2023*
SOURCE | ¹ Ismea and OIV; ² LA FILIERA VITIVINICOLA BIOLOGICA, Ismea; ³ Qualivita Observatory data

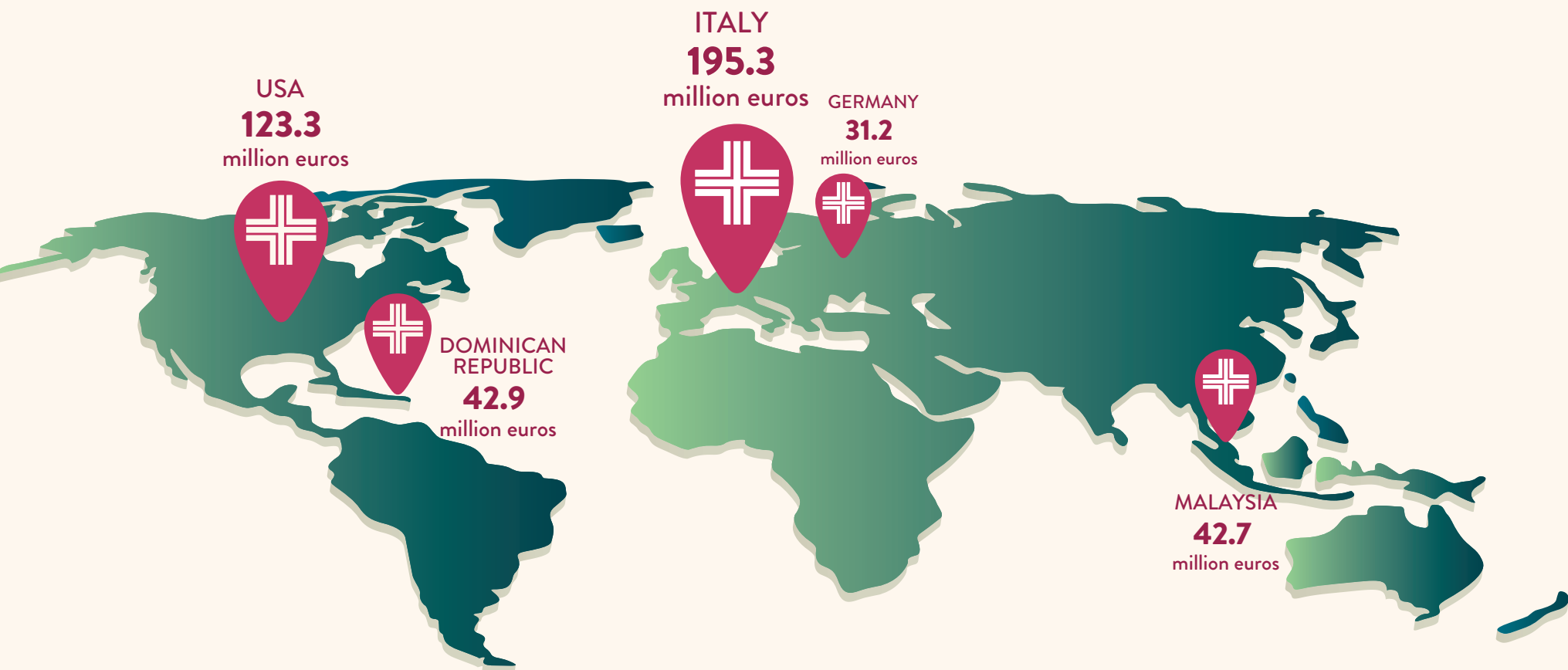


WORLD RECORD IN THE **EXPORT** OF DEVICES FOR THE PREPARATION OF **HOT DRINKS** AND COOKING

Italy ranks first in the world in terms of exports of professional appliances and devices for the preparation of hot drinks, for cooking or heating products (\$1.2 billion), followed by Germany (\$974 million), the United States (\$650 million), Switzerland (\$627 million) and China (\$520 million).¹ This category includes professional coffee machines, a sector in which Italy boasts a production volume of 500 million euros, of which 75% is exported (375 million euros).² There are more than 1000 Italian enterprises operating in coffee roasting and selling in the world.

08.

The value of exports of the main countries exporting appliances and devices for the preparation of hot drinks, cooking or heating products, 2021 (millions of US dollars)



ULTRAVIOLET AND INFRARED TECHNOLOGIES IN MEDICINE: ITALY LEADS GLOBAL EXPORTS

Italy with 195.3 million euros is the world's leading exporter of ultraviolet and infrared equipment for medical and surgical use, followed by the USA (123.3 million euros), the Dominican Republic (42.9 million euros), Malaysia (42.7 million euros) and Germany (31.2 million euros). This record strengthened during the pandemic - an increase of 44.0% was recorded between 2019 and 2021, and this category accounts for 31.8% of the world's exports of medical and surgical equipment.¹ Overall, Italy ranks second in Europe in terms of the number of employees in the medical equipment sector (118,837), behind Germany (235,000), and ahead of the UK (106,500), France (88,000), and Switzerland (63,000).² 15.1% of those employed in the sector on the continent work in our country.³

09.

Export value of the main countries exporting ultraviolet and infrared equipment for medical and surgical use, 2021 (millions of euros)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023

SOURCE | ¹ Elaboration of Confindustria Dispositivi Medici based on UN Comtrade data; ² Facts and figures 2022, Medtech Europe; ³ Il settore in numeri 2022, Confindustria Dispositivi Medici



+894.1 million euros

-1,086.8 million euros

-1,205.6 million euros

-1,791.1 million euros

THE FIRST PLACE IN THE TRADE BALANCE OF **SPORTING GOODS** AMONG THE MAJOR EU COUNTRIES AND THE **LEADER** IN THE EXPORT OF SNOWSPORTS CLOTHING

Italy is the leading player in the European sports system, a unique case among large European countries with a trade surplus of 894.1 million euros in sporting goods. The volume of Italian exports is 3,264 million euros (fourth in Europe), of which about a quarter is related to sports shoes, 20% – to equipment for gymnastics, athletics and swimming, and 15.8% – to equipment for boats and water sports.¹ With \$217.3 million, Italy is the world's first exporter of winter sports shoes, namely ski boots and snowboard shoes, as well as cross-country skis. The country is followed by Austria (\$113.3 million), Romania (\$112.5 million), China (\$68.8 million) and France (\$57.3 million). Italy ranks second in Europe and fourth in the world in the export of ski suits.² The 2026 Winter Olympics will be held between Milan and Cortina.

10.

Trade balance of sporting goods of major EU countries, 2021 (millions of euros)

FONDAZIONE SYMBOLA, ITALY IN 10 SELFIES. 2023

SOURCE | ¹ International trade in sporting goods 2016 and 2021, Eurostat; ² Elaborations of Symbola Foundation developments based on data from UNComtrade 2021



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SYMBOLA – FONDAZIONE PER LE QUALITÀ ITALIANE

“Symbola” – the word that in ancient Greek means “to unite” – was founded to unite and promote a quality-oriented development model: soft economy, which combines traditions, territory, technological innovation and research, which combines competitiveness and enhancement of human capital, economic development and respect for the environment and human rights. A development model focused on sustainability and based on a green economy, the role of culture and creativity, social cohesion and a closed-loop economy. Symbola – Fondazione per le qualità italiane is a cultural movement that unites personalities of the economic and business world, people with an active civic position, representatives of territorial and state organizations, cultural figures and representative offices. Symbola speaks to society, economics, institutions and politics, including through intensive analytical and research activities. All the published reports, the main of which are GreenItaly, Io sono Cultura, Coesione e Competizione, I.T.A.L.I.A. Geografie del nuovo Made in Italy, are available online and can be downloaded for free from the website.

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