



ERASMUS+ PROGRAMME

**KA2 - Cooperation for Innovation and the Exchange of Good Practices
Strategic Partnerships for vocational education and training**

ERASMUS+ PROGRAMME¹

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**PROJECT TITLE: Furniture and Language innovative integrated learning
for sector Attractiveness and Mobility Enhancement- FLAME
O1/ A1. Occupations and qualifications analyses and selection**

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Employment in the European furniture sector in Europe

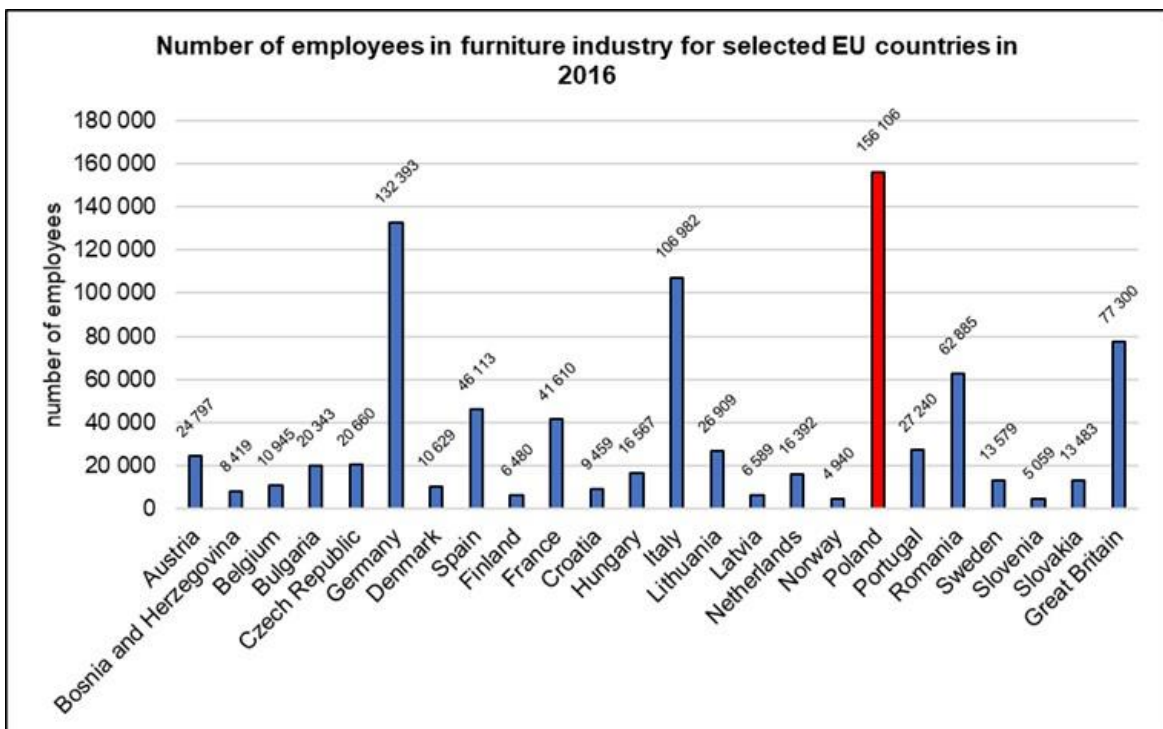
As far as furniture sector is concerned (NACE 31), the total employment volume in Europe (EU 28) was in 2016 almost one million (1.000.000), thus covering about 3% of European manufacturing workers.

Table 1.- Manufacture of furniture, Num. of persons employed (Source: EUROSTAT) / e:estimated

FURNITURE	Persons employed in 2016	% Persons employed furniture / Persons employed in manufacturing
European Union (28 countries)	1.000.000 e	3%

As can be seen in the figure 1, the top 5 countries by number of employees in the Furniture sector are: Poland, Germany, Italy, United Kingdom and Romania.

Figure 1.- Number of employees in the furniture industry for some countries in 2016 (Source: EUROSTAT)



Economic significance and efficiency of the furniture industry

Table 2 shows the economic significance of the furniture industry in EU.

Table 2.- Significance of furniture industry in the EU28 in 2016 and 2017
(Source: B+R Studio calculations based on Eurostat data)

Specification		2016	2017
European Union 28	GDP	14 tln 908 bln 412 mln EUR	15 tln 330 bln 010 mln EUR
	sold furniture production	77 bln 961 mln EUR	78 bln 245 mln EUR
	share of FSP/GDP	0,52%	0,51%

Table 3 shows the economic efficiency of work in the furniture sector for some selected EU countries in 2016.

Table 3.- Work efficiency in furniture industry for some EU countries in 2016
(Source: B+R Studio calculations based on Eurostat data)

Country	Turnovers per one employee <i>EUR k</i>	Average costs per one employee <i>[EUR k]</i>	Return rate (Turnovers vs employees costs) <i>[EUR k]</i>
Belgium	184,6	42,5	4,3
Bulgaria	23,7	4	5,9
Czech Republic	55,1	11,8	4,7
Danmark	184,9	45,5	4,1
Germany	152,6	39,6	3,9
Spain	88,1	26,8	3,3
France	158,6	45,2	3,5
Croatia	43,9	8,8	5
Italy	157,1	34,8	4,5
Latvia	34,7	7,6	4,6
Lithuania	51,2	9,3	5,5
Hungary	41,6	8,2	5,1
Neterlands	148,3	48,1	3,1
Austria	113,1	38,6	2,9
Poland	55,5	9,9	5,6
Portugal	53,1	12,6	4,2
Romania	31,3	5,5	5,7
Slovenia	65,6	18,5	3,5
Slovakia	64,2	13	4,9
Finland	146,8	38,9	3,8
Sweden	183,1	51,3	3,6
Great Britain	137,3	34,8	3,9
Norway	171,3	50,5	3,4
Bosnia and Herzegovina	32,1	5,9	5,4

Furniture companies in EU

SMEs predominantly compose the EU28 furniture sector (NACE 31), 90,5% of SMEs are micro enterprises (less than 10 employees) and another 7% of companies being small (10 to 49 persons employed). Medium-sized companies (from 50 to 249 persons employed) account for 2%. These companies altogether account for over 75% of total sector production (2015 source EUROSTAT). However, while large companies (more than 250 persons employed) may account for less than 0.5% of total enterprises they generate the 32% of the total value of furniture produced in EU28 (2015 source EUROSTAT). The constant closure of companies that happened during the last years looks to slow down.

Table 4.- Number of furniture enterprises by size in EU28 (Source: EUROSTAT) / n/d: not supplied, e: estimated

Enterprise size:	YEAR / number of enterprises in EU28					
	2011	2012	2013	2014	2015	2016
from 0 to 9 persons employed	110,000	108,157	104,606	104,885	n/d	110,000
m 10 to 19 persons employed	8,589	7,933	7,900	7,675	7,555	8,247
from 20 to 49 persons employed	4,839	4,680	4,478	4,282	4,329	4,400
from 50 to 249 persons employed	2,756	2,590	2,510	2,412	2,400	n/d
250 persons employed or more	425	420	410	404	422	n/d
TOTAL:	126,000	123,774	119,921	119,656	120,000 e	120,000 e

Classical organization structure of Furniture companies

In order to understand which are the occupational profiles with more relevant volumes of workers, we looked to a European Commission key study for the sector, TNO, ZSI, SEOR, *Investing in the Future of Jobs and Skills - Scenarios, implications and options in anticipation of future skills and knowledge needs, Furniture* (2009). It presents the main job function categories within the sector companies.

This structure is highly affected by the high number of SMEs that compose the sector, as previously mentioned. The table below provides an overview of the sector jobs functions.

Table 5.- Jobs functions, volumes and link with Professional profiles (Own calculation done in DIGIT-FUR project based on TNO, ZSI, SEOR (2009) study)

Job function categories	Approx. percentage of Workforce (total workforce in 2016: 1.000.000)	Approx. volume of workers in 2016 per function category	Professional profiles targeted by FLAME (ESCO occupational profiles) <i>NOTE: see next section for understanding the proposed profiles targeted by FLAME</i>
Managers	7% (with a decreasing for high-educated managers and an increase in low-educated managers)	70.000	No covered by this study
ICT Professional	1%	10.000	No covered by this study
Designers	Small share (they are mainly outsourced), estimation less than 1%	< 10.000	No covered by this study
Production manager	2%	20.000	1321s Industrial production manager
Sales and marketing staff	2%	20.000	No covered by this study
Supply chain managers	Small share, estimation less than 1%	< 10.000	1324s Supply Chain manager
Administrative support staff	10%	100.000	No covered by this study
Plant and machinery maintenance and repair workers	6%	60.000	2141s Maintenance & repair engineer + additional profiles not covered by this study
Skilled handicraft workers (Cabinet Makers and Upholsterers)	> 50%	500.000	7522 Cabinet-makers and related workers 7534 Upholsterers and related workers 8219s Furniture assembler 7534 Mattress maker and related workers
Machine operators	4%	40.000	7523 Woodworking-machine tool setters and operators 8172 Wood processing plant operators 814 Foam rubber mixer 8153 Sewing machine operators
Labourers	7%	70.000	9329 Manufacturing labourers not elsewhere classified

Proposal of the occupational profiles to be analyzed by FLAME project

We suggest to analyse the following twelve occupational profiles in the framework of the FLAME project.

Table 6.- List of the proposed occupational profiles to be analysed in the Flame project

ID ISCO-08	Occupational profile	Description	Link to ESCO
7522	Cabinet-makers and related workers	Cabinet-makers and related workers make, decorate and repair wooden furniture, parts, fittings, patterns, models and other wooden products using woodworking machines, machine tools and specialized hand tools.	Link
7523	Woodworking-machine tool setters and operators	Woodworking machine tool setters and operators set-up, operate and monitor automatic or semi-automatic woodworking machines such as precision sawing, shaping, planing, boring, turning and woodcarving machines to fabricate or repair wooden parts for furniture, fixtures and other wooden products.	Link
7534	Upholsterers and related workers	Upholsterers and related workers install, repair and replace upholstery of furniture, fixtures, seats, panels, convertible and vinyl tops and other furnishings of automobiles, railway coaches, aircraft, ships and similar items with fabric, leather, rexine or other upholstery material. They also make and repair cushions, quilts and mattresses.	Link
8172	Wood processing plant operators	Wood processing plant operators monitor, operate and control lumber mill equipment for sawing timber logs into rough lumber, cutting veneer, making plywood and particle board, and otherwise preparing wood for further use.	Link
1321s	Industrial production manager	Industrial production managers oversee the operations and the resources needed in industrial plants and manufacturing sites for a smooth running of the operations. They prepare the production schedule by combining the requirements of clients with the resources of the production plant. They organise the journey of incoming raw materials or semi-finished products in the plant until a final product is delivered by coordinating inventories, warehouses, distribution, and support activities.	Link
1324s	Supply Chain manager (Supply, distribution and related managers)	Supply chain managers plan, manage and coordinate all activities related to the sourcing and procurement of supplies needed to run manufacturing operations from the acquisition of raw materials to the distribution of finished products. The supplies can be raw materials or finished products, and it can be for internal or external use. Moreover, they plan and	Link

		commission all the activities needed to be performed in manufacturing plants and adjust operations to changing levels of demand for a company's products.	
2141s	Maintenance & repair engineer (machinery maintenance and repair workers)	Maintenance and repair engineers focus on the optimization of equipment, procedures, machineries and infrastructure. They ensure their maximum availability at minimum costs.	Link
8219s	Furniture assembler	Furniture assemblers place together all parts of furniture and auxiliary items such as furniture legs and cushions. They may also fit springs or special mechanisms. Furniture assemblers follow instructions or blueprints to assemble the furniture, and use hand tools and power tools.	Link
9329	Factory hands - Manufacturing labourers not elsewhere classified	Factory hands assist machine operators and product assemblers. They clean the machines and the working areas. Factory hands make sure supplies and materials are replenished.	Link
814	Foam rubber mixer	Foam rubber mixers tend the machine that mixes foam rubber particles with liquid latex. They weigh the right amount of ingredients and pour mixtures into moulds to make cushions and mattresses.	Link
8153	Sewing machine operators	Sewing machine operators tend specific sewing machines in the industrial production chain of wearing apparel. They perform operations such as joining, assembling, reinforcing, repairing, and altering of wearing apparel.	Link
7534	Mattress maker and related workers	Mattress makers form mattresses by creating pads and coverings. They tuft mattresses by hand and cut, spread and attach the padding and cover material over the innerspring assemblies.	Link

These occupational profiles are not directly related to each of all identified job functions, only for some of them, meaning they could cover just part of the volume suggested in the table for each of the job functions.

According to our calculation they represent approximately 700.000 workers, representing around 70% of the sector workforce.

This means that the FLAME project would be able to provide useful training opportunities to a huge number of workers of the EU furniture sector.