WOOD2GOOD

www.wood2good.eu

RESTRUCTURING THE WOOD SECTOR

Survey results

With financial support from the EU

In partnership with:

GENERALITAT VALENCIANA CONSELLERIA D'ECONOMIA, INDÚSTRIA, TURISME I OCUPACIÓ

FEVAMA FEDERACION EMPRESARIAL DE LA MADERA Y MUEBLE DE LA COMUNIDAD VALENCIANA

POUR LA SOLIDARITÉ European think & do tank

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VERONA INNOVAZIONE

ÉPÍTŐK ÉFÉDOSZSZ

FCBA INSTITUT TECHNOLOGIQUE

ACKNOWLEDGMENTS

This analisys was prepared on the basis of information provided by a variety of stakeholders from the wood sector and that are established in France, Belgium, Italy, Hungary, the United Kingdom and Spain.

The document was edited by FEVAMA with the results from the survey sent for Wood2Good project partners.

The authors wish to thank all the stakeholders representatives of wood and furniture sector for their time for fill the survey.

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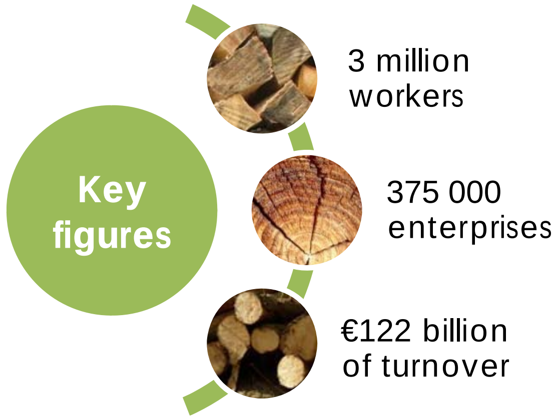
INTRODUCTION

Wood is one of the most important industrial sectors in Europe with close to 3 million workers, and 375 000 enterprises generating an annual turnover of 122 billion euros[1]. However between 2000 and 2012, employment in wood-based industries fell by 17%, the largest losses being recorded in furniture manufacturing (-28.6%). From 2008, the effects of the economic crisis have been felt extremely hard in the timber industry with an acceleration of the labour input reductions at a faster pace than the manufacturing average[2]. The international competition to which the wood sector is submitted can be an element of explanation: the increase of raw material costs in Europe has intensified the already ongoing delocalisation mainly to Asian countries, where sustainable objectives are not as constraining as in Europe.



The EU2020 strategy for a "*smart, sustainable and inclusive growth*" has reoriented Europe towards social, environmental and health standards along with economic and growth targets. However, in view of all the other advantages the wood sector can offer in the fight against climate changes, the recent European decisions such as the agreement on Energy and Climate targets for 2030 may constitute an incentive for decision makers and stakeholders in the sector to develop the use of sustainable wood products. As already mentioned by the European Commission in its 2008 communication[3], even though the wood sector faces new challenges, it also offers opportunities to implement innovative solutions so as to answer the fight against climate change and become the competitive sector it is expected to be in Europe.

Thanks to this survey, the consortium of the Wood2Good project can to improve the comprehension of the current situation of the Wood sector regarding employment, market and opportunities.

[1] SWD(2013) 343 final.
[2] EUROSTAT, Forestry statistics overview, data from September 2013.
[3] COM(2008) final.

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PROJECT PRESENTATION

Wood2Good objectives

The Wood2Good project was developed with the main objective to analyse the current situation of the restructuring in the wood sector and establish recommendations addressed to decision makers so as to ensure a responsible change of wood SMEs towards a green economy.

In order to achieve this aim, the project's specific objectives are to:

1. Improve the comprehension of the situation in the wood sector in terms of employment and sustainable practices;
2. Foster the implementation of a real dialogue between the main stakeholders (social partners, public authorities, technological institutes) and exchanging information on the restructuring of the wood sector through case studies and national workshops;
3. Seek for best practices and innovations to be collected all over Europe;
4. Raise awareness on the restructuration issues in the wood sector and its solutions by sharing the conclusion of the activities led in each country through publications (*Book of recommendations* and *InnoBox Book*) and event organisation (European conferences).

Wood2Good main productions

2 transnational events:

- Launching conference - Brussels, March 2014;
- Final conference - Brussels, December 2014;

1 survey on the perceptions of the wood sector by the stakeholders;
1 report on bibliographical review to better the comprehension of the situation;
4 case studies and workshops in Spain, France, UK, Italy;
1 InnoBox online tool giving access to identified best practices and innovations;
1 InnoBox book presenting a selection of the best practices and innovations;
1 Book of recommendations addressed to decision makers;
1 project website: www.wood2good.eu

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Wood2Good partners

CEITE

Spain (coordinator)

POUR LA SOLIDARITÉ

Belgium

FEVAMA

Spain

FCBA

France

Verona Innovazione

Italy

EFEDOSZSZ

Hungary

Buckinghamshire New University

United-Kingdom

1. SURVEY DESIGN

Improving the comprehension of the current situation of the Wood sector regarding employment, market and opportunities was the main survey´s objective. With the results, we can to perform an analysis of the current situation of the sector in Europe and establish recommendations to ensure a responsible change of the SMEs towards the green economy.

The initial objectives when the survey was designed were:

- To know the opportunities presented by the green economy: The opinion of the sector´s agents about the real situation in the industry, focused on environmental issues.
- To can confront the results of the survey with the bibliographical review: for to detect if companies are rushing responsible changes aiming towards the sustainability, green economy and environmental care, and to identify what are these changes and/or good practices.
- To get answers from all the stakeholders. To have answers from differents company size, differents subsectors and workers from differents funcional area and professional category.

Through the following survey and analyzing the collected data, we wanted to establish the current situation of the sector in Europe.

The results allow us to establish recommendations that will ensure a responsible change of SME practice, which will contribute towards meeting the goals of the green economy. The results also serve us to detect good practices of the enterprises and disseminate recommendations among the stakeholders to reach the competitiveness of the sector in Europe.

The participation to this survey was anonymous and volunteer.

Once filled the identifying data, the survey has four sections:

1º.- Sector situation: With four questions to know the general opinion of the wood sector.

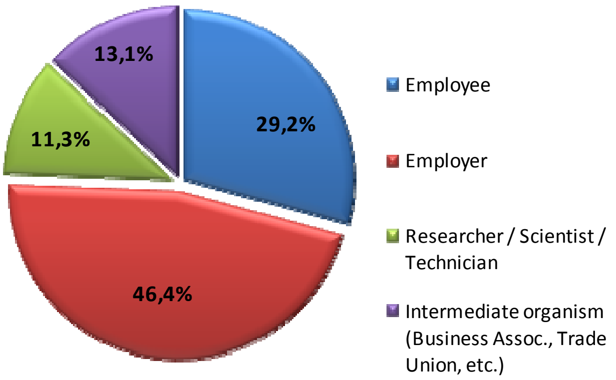
2º.- Actions that companies are carrying out: With four questions about concrete actions about sustainable development, natural resources, furniture finish tasks, …

3º.- Respondent´s Opinion: With two questions to know the individual opinion about the reason for enviromental measures.

4º.- Two questions to know the opinion about the consequences of the responsible changes orienting towards sustainability

The survey was made in five languages: English, French, Italian, Hungarian and Spanish.

2. IDENTIFICATION DATA



The survey was sent to all agents in the sector: Employers, employees, technicians and researchers, scientists, representatives of business associations and trade unions, etc.

Between the surveys completed, we have 46% employers, 29% from employees, 13% from Business Association and Trade Unions and 11% from researcher and technician.

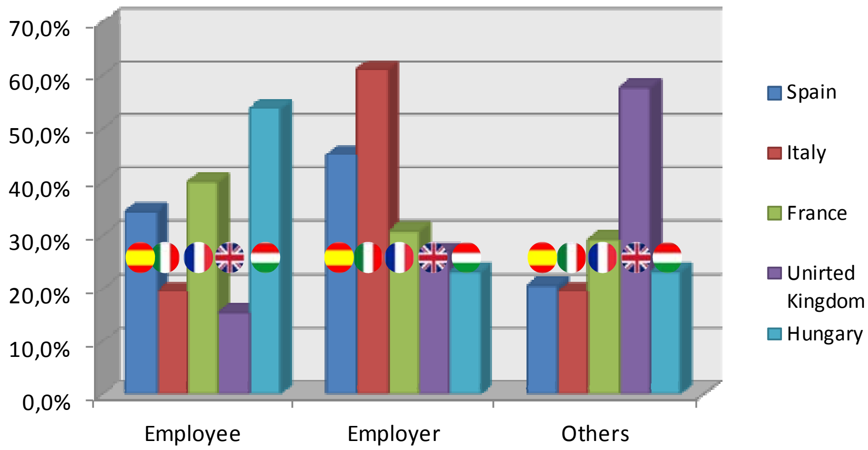
In total we have 76% of responses from people working in SMEs in the Wood sector (employers and employees), and a 24% of stakeholders. This is important, since the survey was made to know the real opinion of the sector.

As we can see in the chart below, in Hungary and France we have more respondents from employees than employers.

In Italy and Spain we have more respondents from employers.

In Italy we have a difference very important between employers (61%) and employees (19%).

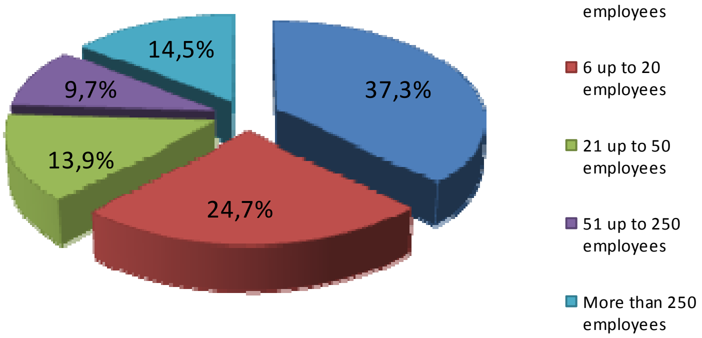
In United Kingdom we have a 58% respondents from intermediate organism, researchers and technicians.



	ES	IT	FR	UK	HU	TOTAL
Employee	34,3%	19,5%	40,0%	15,4%	53,8%	29,2%
Employer	45,1%	61,0%	30,8%	26,9%	23,1%	46,4%
Researcher / Scientist / Technician	13,7%	10,4%	10,8%	19,2%	0,0%	11,3%
Intermediate organism (Business /	6,9%	9,1%	18,5%	38,5%	23,1%	13,1%

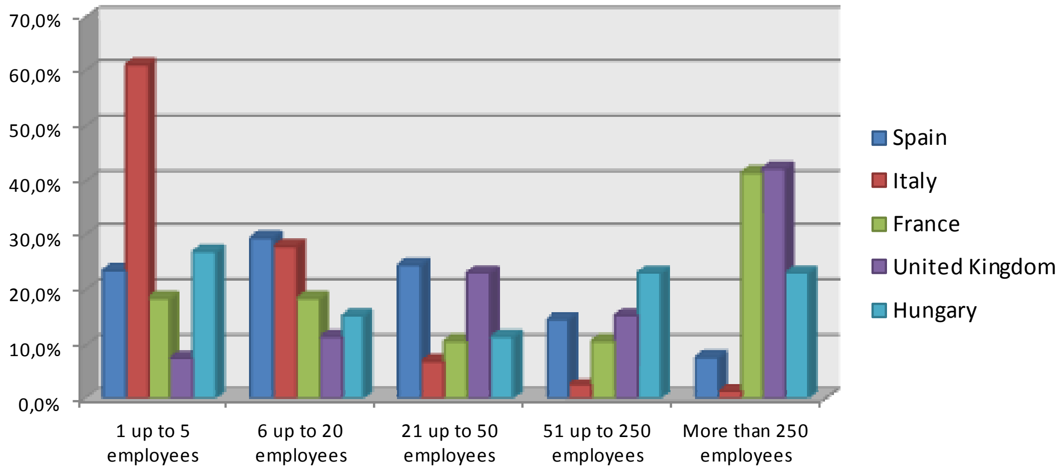
Table response rates in each country

Company size



The 62% are a small companies, to 20 employees (a 37% from 1 to 5 and 25% from 6 to 20 employees).

A 14% from companies 21 to 50 employees. From medium companies, between 50 to 250 we have a 10% and 15% from more than 250 employees.



In Italy, the 90% of respondents are little companies, less than 20 employees (a 89%).

In France a 52% and United Kingdom a 58% companies from more than 51 employees.

In Spain, we have a 53% of respondents less than 20 employees, a 24% from 21 to 50 employees and 23% from companies with more than 51 employees.

	ES	IT	FR	UK	HU	TOTAL
1 up to 5 employees	23,5%	61,0%	18,5%	7,7%	26,9%	37,3%
6 up to 20 employees	29,4%	27,9%	18,5%	11,5%	15,4%	24,7%
21 up to 50 employees	24,5%	7,1%	10,8%	23,1%	11,5%	13,9%
51 up to 250 employees	14,7%	2,6%	10,8%	15,4%	23,1%	9,7%
More than 250 employees	7,8%	1,3%	41,5%	42,3%	23,1%	14,5%

Table response rates in each country taking into account the size of companies

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Through the previous table we can see the different structure of responses in countries like Italy and Spain to France and the UK, so we can lead to differences in survey results.

From 37% of companies of 1-5 employees, 68% are Italian companies, and 32% from other countries surveyed. From 14.5% of companies with more than 250 employees who responded to the survey, 50% are of French companies and 20% of the UK.

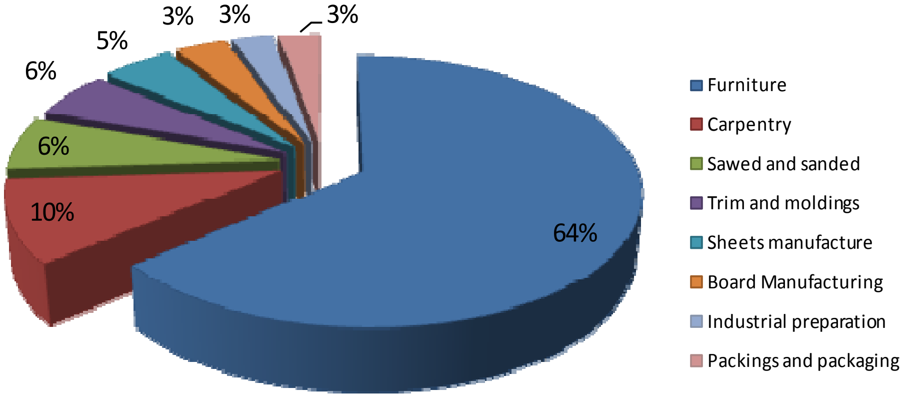
	ES	IT	FR	UK	HU	TOTAL
1 up to 5 employees	17,3%	67,6%	8,6%	1,4%	5,0%	100,0%
6 up to 20 employees	32,6%	46,7%	13,0%	3,3%	4,3%	100,0%
21 up to 50 employees	48,1%	21,2%	13,5%	11,5%	5,8%	100,0%
51 up to 250 employees	41,7%	11,1%	19,4%	11,1%	16,7%	100,0%
More than 250 employees	14,8%	3,7%	50,0%	20,4%	11,1%	100,0%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed, by company size.

In the section of companies to 5 employees, the answers of Italian companies are going to have a pretty high importance, as in the size of firms 6-20 workers, where Italian and Spanish companies are nearly 80% of responses.

Subsector

To 76% of responses were granted to employers and employees of companies belonging to the wood and furniture sector. Among the 76% of responses, we have 64% of companies in the furniture subsector and 36% of companies from other subsectors (carpentry, industrial preparation, manufacture of veneer sheets, manufacture of boards, etc.



In all countries surveyed, furniture subsector is most responses we obtained, being above the middle (64%) Italy and the UK (85% and 88% respectively.

In France also highlights the answers obtained from the subsector of sawed and sanded regard to all the ones obtained in this subsector in all countries, with 33% of responses compared to 6% on average.

	ES	IT	FR	UK	HU	TOTAL
Furniture	62%	85%	33%	88%	30%	64%
Carpentry	13%	4%	13%	0%	20%	10%
Sawed and sanded	0%	0%	33%	0%	10%	6%
Trim and moldings	6%	4%	13%	0%	0%	6%
Sheets manufacture	10%	0%	0%	0%	20%	5%
Board Manufacturing	6%	2%	0%	13%	0%	4%
Industrial preparation	0%	2%	4%	0%	20%	3%
Packings and packaging	4%	2%	4%	0%	0%	3%
	100%	**100%**	**100%**	**100%**	**100%**	**100%**

Table response rates in each country for each subsector

The weight of the responses of the Italian and Spanish companies in the furniture manufacturing subsector represents about 80% of this subsector.

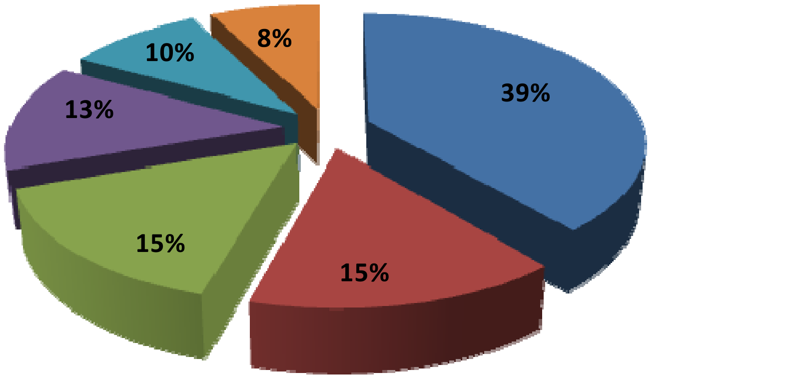
A 50% response from the subsector of carpentry and packing and packaging, 71% sheets manufacture subsector and 60% of board manufacturing subsector come from Spanish companies. The 89% response from sawed and sanded subsector are from France.

	ES	IT	FR	UK	HU	TOTAL
Furniture	35%	45%	9%	8%	3%	100%
Carpentry	50%	14%	21%	0%	14%	100%
Sawed and sanded	0%	0%	89%	0%	11%	100%
Trim and moldings	38%	25%	38%	0%	0%	100%
Sheets manufacture	71%	0%	0%	0%	29%	100%
Board Manufacturing	60%	20%	0%	20%	0%	100%
Industrial preparation	0%	25%	25%	0%	50%	100%
Packings and packaging	50%	25%	25%	0%	0%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed, by subsector.

Funcional Area

When we designed this survey we wanted that the companies management staff were to a greater extent give their opinion about the real sector situation. And it is that we have achieved because we have from direction a 39% respondents.



Furthermore, we also want to get the answers of workers directly involved in the environmental management of companies related to production and technical department, having achieved a 15% response from production workers, and 15% from technical office.

We also have answers from administration (9%) and from commercial department (7,5%).

These percentages achieved with the answers approach the original objectives, validating the results.

	ES	IT	FR	UK	HU	TOTAL
Direction	49%	35%	37%	50%	12%	**38,6%**
Production	8%	20%	11%	8%	35%	**15,3%**
Technical Office	14%	12%	28%	15%	8%	**15,3%**
Others	2%	15%	18%	19%	27%	**13,1%**
Administration	21%	6%	2%	4%	8%	**9,4%**
Commercial	7%	10%	5%	4%	4%	**7,5%**
Maintenance	0%	1%	0%	0%	8%	**0,8%**
	100%	**100%**	**100%**	**100%**	**100%**	**100%**

Table response rates in each country for functional area

Most management staff that answered the survey were from Spain and Italy, reaching between both countries a 73% of total responses among the executives surveyed.

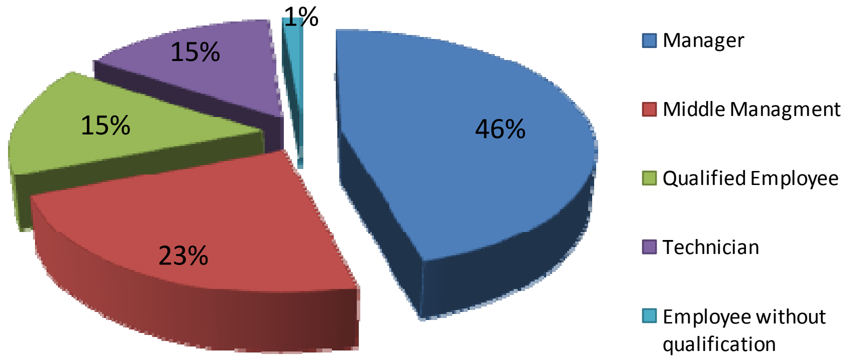
54% of workers in the production department who responded to the survey are Italian, and 89% from responses administration department have been in Italia and Spain, too.

At the commercial department, over 57% from responses came from Italy.

	ES	IT	FR	UK	HU	TOTAL
Direction	35%	38%	17%	9%	2%	100%
Production	14%	54%	12%	4%	16%	100%
Technical Office	25%	33%	32%	7%	4%	100%
Others	4%	47%	24%	10%	14%	100%
Administration	60%	29%	3%	3%	6%	100%
Commercial	25%	57%	11%	4%	4%	100%
Maintenance	0%	33%	0%	0%	67%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed, by functional area.

Professional Category



Relative to professional category, we have a 46% from managers, 23% from middle management, 15% from qualified employees and 14% technicians.

Definitively, 99% from answers come from technical, middle managers, executives and qualified personnel, and only 1% unqualified personnel, which it help us to validate the results obtained with the answers.

	ES	IT	FR	UK	HU	TOTAL
Manager	53%	40%	48%	62%	31%	**45,8%**
Middle Managment	16%	13%	51%	31%	38%	**23,3%**
Qualified Employee	14%	23%	0%	4%	19%	**15,0%**
Technician	18%	20%	2%	4%	12%	**14,5%**
Employee without qualification	0%	3%	0%	0%	0%	**1,3%**
	100%	**100%**	**100%**	**100%**	**100%**	**100,0%**

Table response rates in each country for professional category

	ES	IT	FR	UK	HU	TOTAL
Manager	32%	36%	18%	9%	5%	100%
Middle Managment	18%	23%	38%	9%	11%	100%
Qualified Employee	25%	64%	0%	2%	9%	100%
Technician	33%	57%	2%	2%	6%	100%
Employee without qualification	0%	100%	0%	0%	0%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed, by professional country.

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3. SECTOR FEELING

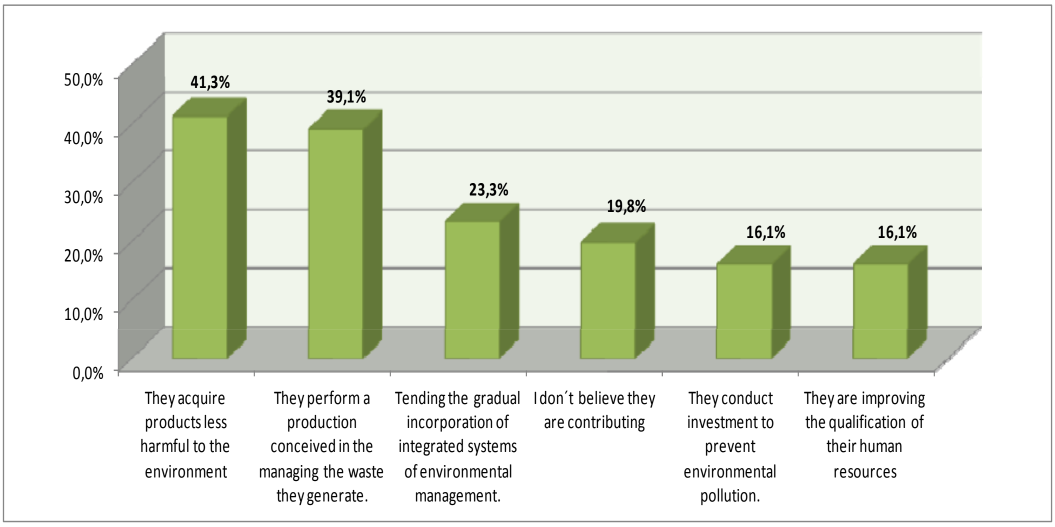
The first question at the survey was:

"In your opinion and in general terms, the companies in the wood and furniture sector contribute to the protection and improvement of the environment because ..."

Choose as many as you like

- A • They acquire products less harmful to the environment and induce their suppliers to provide these.
- B • They conduct investment to prevent enviromental production
- C • They perform a production conceived in the maximisation of the "3Rs", Reduce, Recycle and Reuse, managing the waste they generate, both inert and dangerous.
- D • Tending the gradual incorporation of integrated systems of environmental management.
- E • They are improving the qualification of their human resources with respect to environmental management.
- F • I don´t believe they are contributing to the protection of the environment.

Almost a 42% have pointed they acquire products less harmful to the environment and 39% they perform a production conceived in the managing the waste they generate. These are the two most pointed responses.



Take off a 20% people pointed these two responses together, almost a 70% people responding the survey that they think the companies are producing managing the waste generated or acquiring products less harmful.

But a 20% believe the companies are not contributing to the protection and improvement of the environment. In Italy this percentage is a 29%. In UK only a 4%. In companies with 1 to 5 employees this percentage is 25%, while in companies with more than 250 employees is only a 13%.

Respondents valued in last place that companies are making improvements in the qualification of human resources regard environmental management, because only 16% of respondents think their company or companies in the sector are undertaking.

	ES	IT	FR	UK	HU
They acquire products less harmful to the environment	43%	36%	52%	46%	35%
They perform a production conceived in the managing the waste they generate.	45%	33%	45%	38%	38%
Tending the gradual incorporation of integrated systems of environmental management.	33%	11%	28%	31%	38%
I don´t believe they are contributing	11%	29%	17%	4%	23%
They conduct investment to prevent environmental pollution.	25%	9%	23%	12%	12%
They are improving the qualification of their human resources	20%	16%	14%	12%	12%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

If we analyze the results of this first question in more detail, we highlight the following:

- Regarding 16% from responses obtained in making investments to prevent environmental pollution, respondents from SMEs (fewer than 20 employees) only answer 12% of cases yes they are doing it. In large companies this percentage rises to 25%. In this sense, business and technical respondents think that if they are investing (18-26% respectively), while only 10% of employees in companies think investments are made to prevent environmental protection.

- In Hungary, Spain and the UK, for example, respondents have answered us by 38%, 33% and 31% respectively, that companies are beginning to incorporate integrated environmental management systems, which in Italian companies understand that is not being performed, with only 11% of responses. The average of all responses was 23%.

Highlights that 61% of respondents think that companies are not contributing to environmental protection are from Italy. Respondents in Italy are, with 28% of responses, most believe that it is not doing anything.

Both employers and employees believe, with 22% of responses, that companies are not doing anything, while the remaining respondents seem more optimistic.

	ES	IT	FR	UK	HU	TOTAL
They acquire products less harmful to the environment	29%	36%	22%	8%	6%	**100%**
They perform a production conceived in the managing the waste they generate.	32%	35%	20%	7%	7%	**100%**
Tending the gradual incorporation of integrated systems of environmental management.	39%	20%	21%	9%	11%	**100%**
I don´t believe they are contributing	15%	61%	15%	1%	8%	**100%**
They conduct investment to prevent environmental pollution.	42%	23%	25%	5%	5%	**100%**
They are improving the qualification of their human resources	33%	42%	15%	5%	5%	**100%**

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

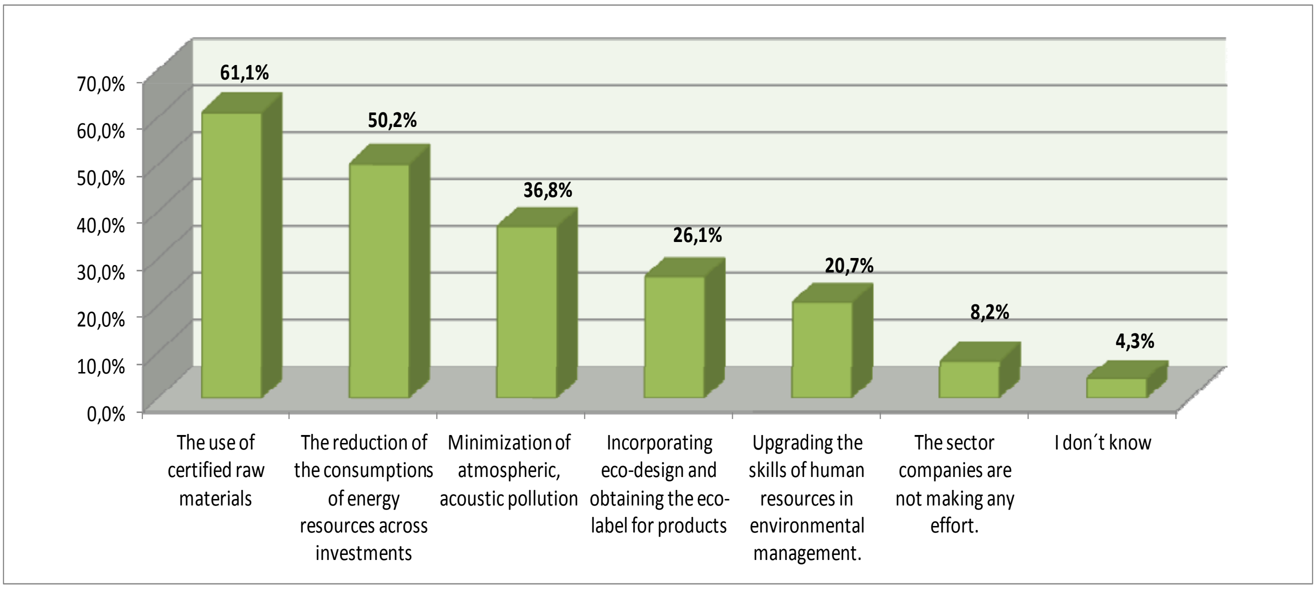
The second question at the survey was:

"There are sector companies which are making environmental efforts, however towards what kind of specific actions do you think they are heading"

Choose as many as you like

- A • The reduction of the consumptions of energy resources across investments in productive processes and rationalisation of the consumption of raw material.
- B • The use of certified raw materials, wood monitoring and trace responsibility and certifying the custody line.
- C • Minimization of atmospheric, acoustic pollution and discharges with a decrease in the volume of waste generated, increasing recycling.
- D • Upgrading the skills of human resources in environmental management. Information and training.
- E • Incorporating eco-design and obtaining the eco-label for products, as an instrument for improving consumer information.
- F • In my opinion, the sector companies are not making any effort.
- G • I don´t know

Another opinion that we asked respondents was what kind of specifics actions they think the companies are heading.



More than half of respondents (61%) scored that companies are using certified raw materials, wood monitoring and trace responsability and certifying the custody line. Also half of respondents (50%) believe that companies are making changes in production processes aimed to the reduction of the consumptions of energy resources across investments in productive processes and rationalisation of the consumption of raw material.

On the contrary, only 20% of respondents thinks that companies are making the improvement of qualification of human resources in environmental management through training and information, upgrading their skills. Fortunately, only 8% think that companies are not making any effort.

As usual, we get higher percentages of respondents from large companies (50 or more employees), except the option that companies are not making any effort on environmental issues where are SMEs that believe in a higher percentage than they aren´t doing it (14.5% in companies of 1-5 employees).

	ES	IT	FR	UK	HU
The use of certified raw materials	64%	42%	78%	50%	31%
The reduction of the consumptions of energy resources across investments	42%	35%	71%	27%	58%
Minimization of atmospheric, acoustic pollution	44%	18%	31%	38%	69%
Incorporating eco-design and obtaining the eco-label for products	15%	24%	38%	27%	8%
Upgrading the skills of human resources in environmental management.	20%	15%	12%	19%	46%
The sector companies are not making any effort.	5%	9%	5%	4%	15%
I don´t know	2%	7%	2%	0%	0%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
The use of certified raw materials	32%	32%	25%	6%	4%	100%
The reduction of the consumptions of energy resources across investments	26%	33%	28%	4%	9%	100%
Minimization of atmospheric, acoustic pollution	37%	23%	17%	8%	15%	100%
Incorporating eco-design and obtaining the eco-label for products	17%	43%	29%	8%	2%	100%
Upgrading the skills of human resources in environmental management.	29%	34%	12%	7%	18%	100%
The sector companies are not making any effort.	19%	52%	11%	4%	15%	100%
I don´t know	14%	79%	7%	0%	0%	100%

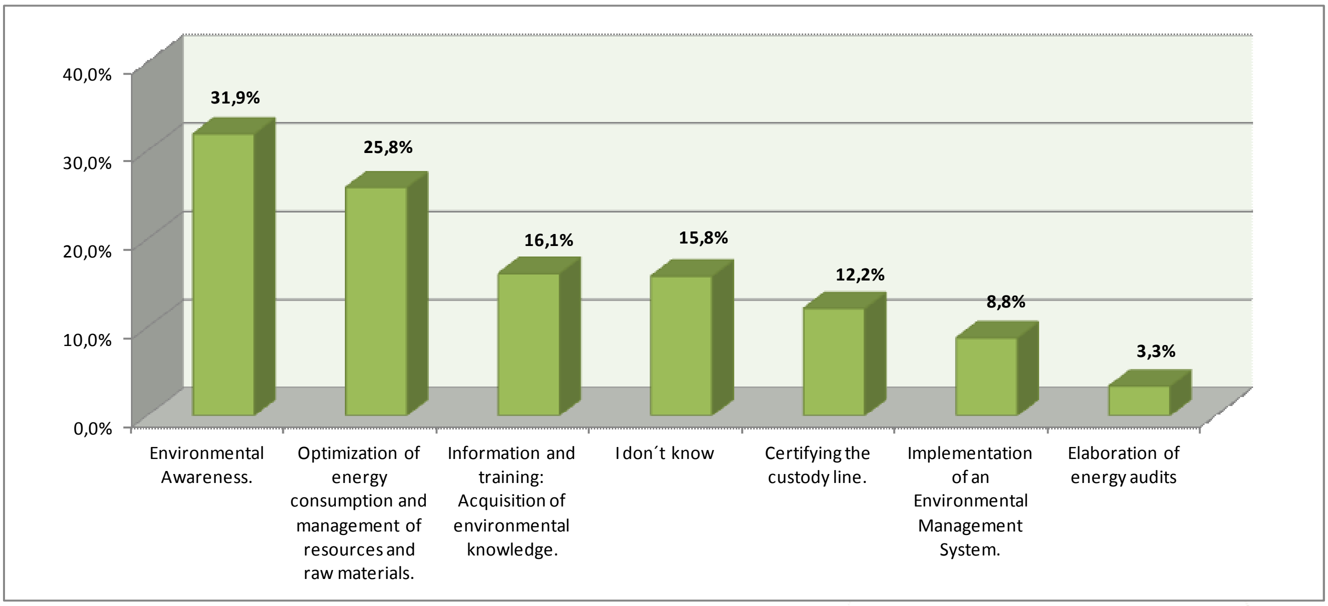
Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

The third question at the survey was:

"In your opinion the companies in the wood and furniture sector, regarding sustainability and respect to the environment, have reached the following point"

- A • Information and training: Acquisition of environmental knowledge.
- B • Environmental Awareness.
- C • Implementation of an Environmental Management System.
- D • Optimisation of energy comsumption and management of resources and raw materials
- E • Certifying the custody line.
- F • Elaboration of energy audits.
- G • I don´t know

The third question about the respondent's view, we tried to establish, if it were possible, the level of "commitment" of companies to sustainability and the environment. It was the only question that was allowed only one answer, to try to establish the "environmental level" where most European companies in our industry are located.



The levels we had established was, from lowest to highest commitment: Information and training, environmental awareness, implementation of an environmental management system, optimisation of energy consumption, certifying the custody line and elaboration of energy audits.

By responses respondents, 32% believe that companies are environmentally awareness and 26% who are trying to optimize their energy consumption and management of resources and raw materials.

About 12% believe that companies in the sector are certifying the custody line, 8.8% implementing of an environmental management system and 3% only elaboration of energy audits.

	ES	IT	FR	UK	HU
Environmental Awareness.	26%	28%	28%	41%	23%
Optimization of energy consumption and management of resources and raw materials.	25%	22%	20%	15%	31%
Information and training: Acquisition of environmental knowledge.	17%	14%	12%	15%	12%
I don´t know	3%	23%	12%	0%	19%
Certifying the custody line.	16%	8%	15%	7%	0%
Implementation of an Environmental Management System.	10%	3%	11%	15%	12%
Elaboration of energy audits	3%	3%	2%	7%	4%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

Viewing the previous results by country, we can see how in most countries the most answers regarding what level they have reached sector companies is environmental awareness and the optimization of energy consumption.

Below in almost all countries are the following "levels", which would be certified the custody line and information and training human resources in environmental knowledge. In Italy highlights for 23% of responses from I don´t know.

Lower are the implementation of an environmental management system and the elaboration of energy audits.

The results are quite similar in all countries, with little differences. If anything could highlight that for a higher percentage of respondents in Spain and France sector companies are working with the Certification the custody line.

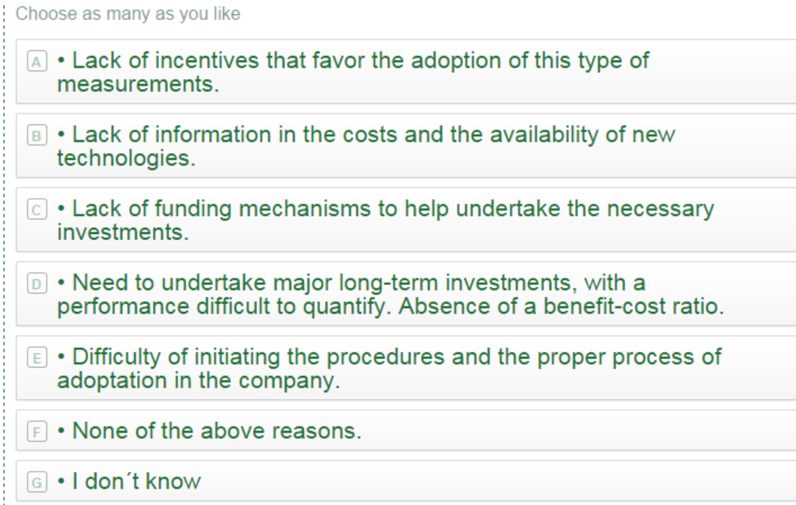
	ES	IT	FR	UK	HU	TOTAL
Environmental Awareness.	26%	41%	17%	10%	6%	**100%**
Optimization of energy consumption and management of resources and raw materials.	31%	40%	15%	5%	9%	**100%**
Information and training: Acquisition of environmental knowledge.	32%	40%	15%	8%	6%	**100%**
I don´t know	6%	69%	15%	0%	10%	**100%**
Certifying the custody line.	40%	30%	25%	5%	0%	**100%**
Implementation of an Environmental Management System.	34%	17%	24%	14%	10%	**100%**
Elaboration of energy audits	27%	36%	9%	18%	9%	**100%**

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

We can see that in companies with more than 50 employees there are small differences in the percentages of certification of custody line, implementation of an environmental management system or the elaboration of energy audits compared to other small companies.

The fourth question at the survey was:

"What could the motivation be for companies to not adopt any specific measures for energy savings yet?"


Choose as many as you like

A • Lack of incentives that favor the adoption of this type of measurements.

B • Lack of information in the costs and the availability of new technologies.

C • Lack of funding mechanisms to help undertake the necessary investments.

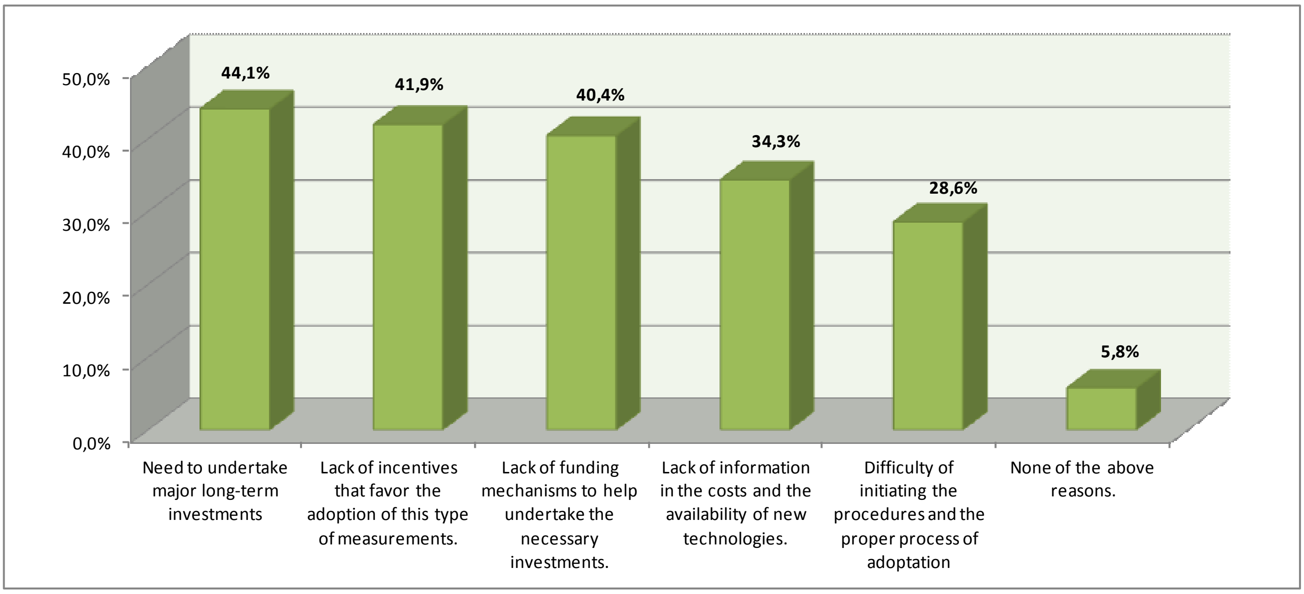
D • Need to undertake major long-term investments, with a performance difficult to quantify. Absence of a benefit-cost ratio.

E • Difficulty of initiating the procedures and the proper process of adoption in the company.

F • None of the above reasons.

G • I don´t know

The last question of opinion we did to respondents was to know the reason why they understood that some companies in the sector had not yet started any concrete action for energy savings.



The need to undertake investments, with a lack of cost-benefit (44% of responses), lack of funding mechanisms (40%) and lack of incentives (41,9%) are the three most prominent responses.

The reason which seems to be the least important for not to have begun any action for energy saving is to be internal difficulties to undertake adaptation processes, with only 28,6% of responses.

In this question "multi-choice" respondents have marked an average of over 2 replies each, which implies that exist for most various reasons for not out energy saving actions are carried in the sector companies and that we also check in the percentages of responses, being pretty even at 5 answers they had to dial.

	ES	IT	FR	UK	HU
Need to undertake major long-term investments	45%	29%	42%	37%	65%
Lack of incentives that favor the adoption of this type of measurements.	40%	37%	31%	30%	42%
Lack of funding mechanisms to help undertake the necessary investments.	44%	28%	31%	48%	46%
Lack of information in the costs and the availability of new technologies.	37%	26%	37%	22%	15%
Difficulty of initiating the procedures and the proper process of adoptation	25%	26%	32%	15%	12%
None of the above reasons.	1%	8%	3%	7%	4%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

For spanish and french respondents the most prominent reason is need to undertake major long-term investments, with a 45% and 42% respectively. But for the italian is lack of incentives that favor the adoptation of this type of measures, with 37% of responses.

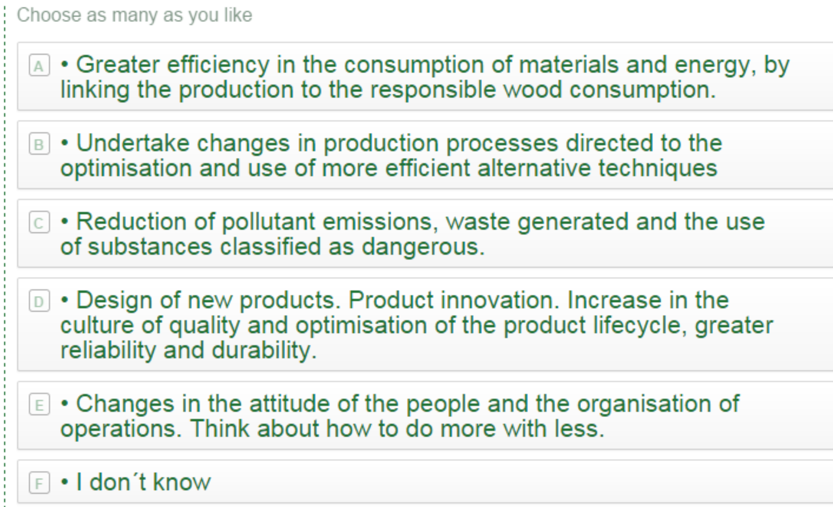
	ES	IT	FR	UK	HU	TOTAL
Need to undertake major long-term investments	32%	31%	19%	7%	12%	100%
Lack of incentives that favor the adoption of this type of measurements.	30%	42%	14%	6%	8%	100%
Lack of funding mechanisms to help undertake the necessary investments.	34%	32%	15%	10%	9%	100%
Lack of information in the costs and the availability of new technologies.	34%	36%	21%	5%	4%	100%
Difficulty of initiating the procedures and the proper process of adoptation	28%	43%	22%	4%	3%	100%
None of the above reasons.	5%	68%	11%	11%	5%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

4. ACTIONS

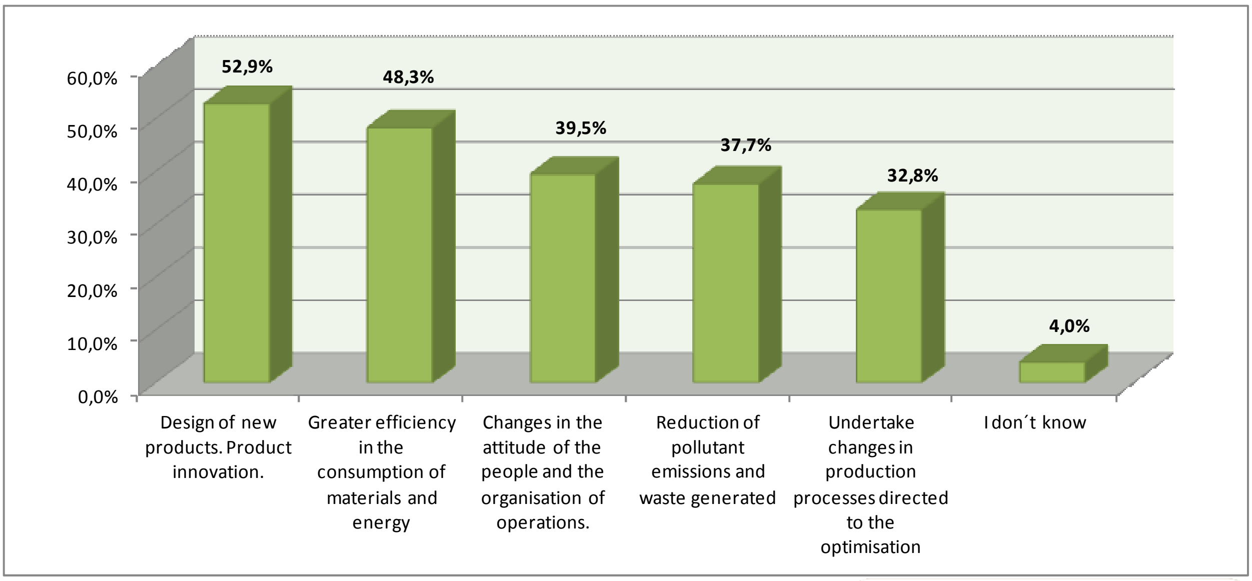
The fifth question at the survey was:

"What specific actions do you think sector companies should carry to be truly involved in sustainable development"


Choose as many as you like

- A • Greater efficiency in the consumption of materials and energy, by linking the production to the responsible wood consumption.
- B • Undertake changes in production processes directed to the optimisation and use of more efficient alternative techniques
- C • Reduction of pollutant emissions, waste generated and the use of substances classified as dangerous.
- D • Design of new products. Product innovation. Increase in the culture of quality and optimisation of the product lifecycle, greater reliability and durability.
- E • Changes in the attitude of the people and the organisation of operations. Think about how to do more with less.
- F • I don´t know

In this question we started wanting to know opinions about what concrete actions respondents think should conduct companies to be truly involved in sustainable development.



The design of new products, product innovation (53%) and greater efficiency in the consumption of materials and energy (48%) are the two actions that a greater percentage of respondents think that should carry to by companies to be truly involved in sustainable development.

Noted that more than half of respondents indicates as the most outstanding performance that should carry product innovation through design, an increase in the cultura of quality and optimization of the product lifecycle (greater reliability and durability).

Again, being a multiple-choice question, respondents answered, on average, more than 2 options each one, giving us understand the need to make different performances, not just one, to be truly environmentally involved.

	ES	IT	FR	UK	HU
Design of new products. Product innovation.	49%	46%	46%	48%	38%
Greater efficiency in the consumption of materials and energy	51%	29%	54%	37%	65%
Changes in the attitude of the people and the organisation of operations.	40%	27%	37%	33%	54%
Reduction of pollutant emissions and waste generated	42%	29%	26%	19%	54%
Undertake changes in production processes directed to the optimisation	34%	23%	35%	30%	23%
I don´t know	2%	7%	0%	0%	0%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
Design of new products. Product innovation.	29%	41%	17%	7%	6%	100%
Greater efficiency in the consumption of materials and energy	33%	28%	22%	6%	11%	100%
Changes in the attitude of the people and the organisation of operations.	32%	32%	18%	7%	11%	100%
Reduction of pollutant emissions and waste generated	35%	36%	14%	4%	11%	100%
Undertake changes in production processes directed to the optimisation	32%	33%	21%	7%	6%	100%
I don´t know	15%	85%	0%	0%	0%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

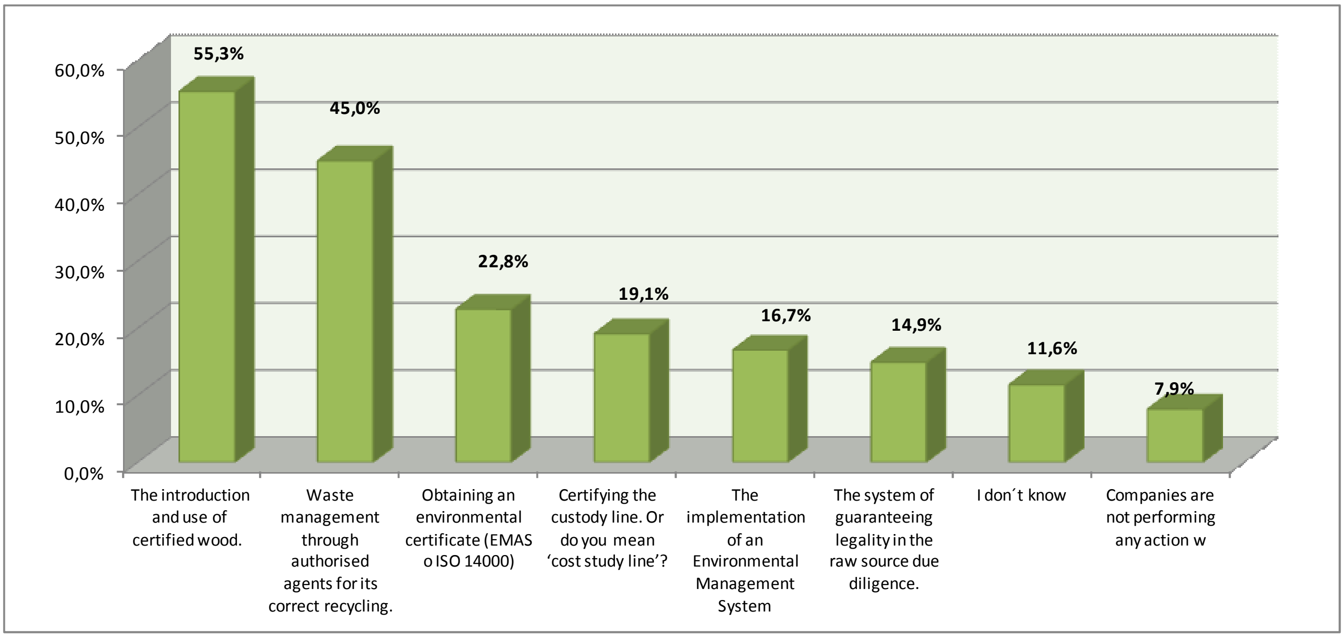
The sixth question at the survey was:

"In your opinion, which action/s made by the sector companies are/is more prominent, in terms of management of natural resources?"

Choose as many as you like

- A • The introduction and use of certified wood.
- B • Waste management through authorised agents for its correct recycling.
- C • Obtaining an environmental certificate (EMAS o ISO 14000)
- D • The implementation of an Environmental Management System
- E • Certifying the custody line. Or do you mean 'cost study line'?
- F • The system of guaranteeing legality in the raw source due diligence.
- G • Companies are not performing any action with respect to the management of resources.
- H • I don´t know

We also want to know the opinion of respondents about companies are doing in relation to the management of natural resources.



With 55% of responses, the introduction and use of certified wood is the most important action the companies are performing companies in the sector, and the waste management through authorized agents for its correct recycling, with 45%.

The other answers are at a lower level, highlighting this 11.6% of responses "do not know" and 7.3% of companies “companies are not performing any action“, which means that almost 19%, 2 from each 10 respondents, believes that companies in the sector or is not performing anything regarding the management of natural resources or don´t know what they are doing.

	ES	IT	FR	UK	HU
The introduction and use of certified wood.	44%	40%	85%	41%	35%
Waste management through authorised agents for its correct recycling.	51%	28%	58%	19%	38%
Obtaining an environmental certificate (EMAS o ISO 14000)	22%	13%	12%	44%	50%
Certifying the custody line. Or do you mean ‘cost study line’?	32%	8%	22%	15%	0%
The implementation of an Environmental Management System	16%	12%	14%	22%	23%
The system of guaranteeing legality in the raw source due diligence.	20%	9%	11%	15%	15%
I don´t know	8%	17%	0%	0%	15%
Companies are not performing any action w	6%	10%	5%	4%	4%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
The introduction and use of certified wood.	25%	34%	30%	6%	5%	100%
Waste management through authorised agents for its correct recycling.	35%	29%	26%	3%	7%	100%
Obtaining an environmental certificate (EMAS o ISO 14000)	29%	27%	11%	16%	17%	100%
Certifying the custody line. Or do you mean 'cost study line'?	52%	19%	22%	6%	0%	100%
The implementation of an Environmental Management System	29%	33%	16%	11%	11%	100%
The system of guaranteeing legality in the raw source due diligence.	41%	29%	14%	8%	8%	100%
I don´t know	21%	68%	0%	0%	11%	100%
Companies are not performing any action w	23%	58%	12%	4%	4%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

The seventh question at the survey was:

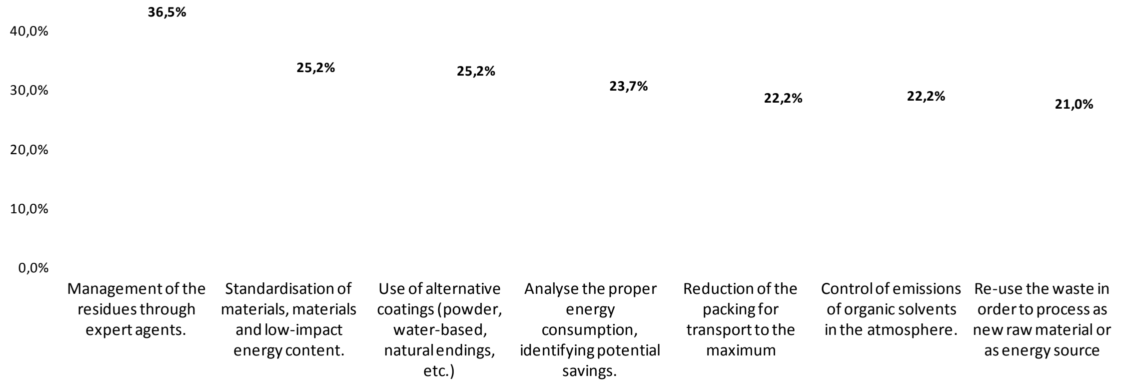
"In your opinion, which action/s made by the sector companies are/is more prominent?"

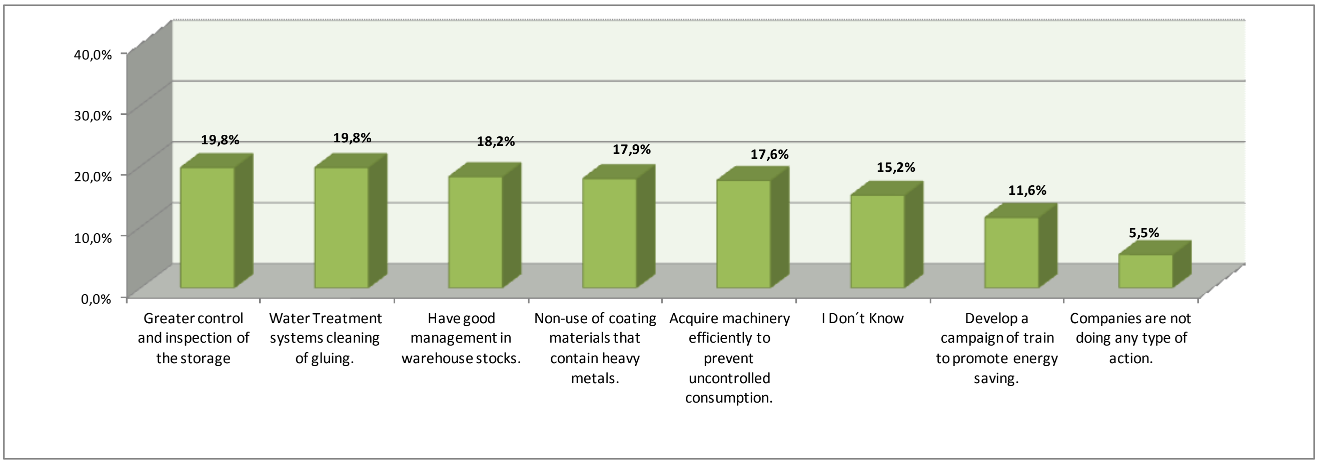
Choose as many as you like

- A • Standardisation of materials and selection of materials and low-impact energy content.
- B • Greater control and inspection of the storage and correct labeling of dangerous substances.
- C • Management of the poisonous and dangerous residues through expert agents.
- D • Water Treatment systems cleaning of gluing.
- E • Control of emissions of organic solvents in the atmosphere.
- F • Non-use of coating materials that contain heavy metals.
- G • Use of alternative coatings (powder, water-based, natural endings, etc.)
- H • Reduction of the packing for transport to the maximum, to generate less waste.
- I • Analyse the proper energy consumption, identifying potential savings.
- J • Acquire machinery efficiently and to prevent uncontrolled consumption.
- K • Re-use the waste in order to process as new raw material or as energy source.
- L • Have good management in warehouse stocks.
- M • Develop a campaign of information and train employees to promote energy saving.
- N • Companies are not doing any type of action.
- O • I don´t know

In question 12 we were looking for "order" by relevance the main "green" actions which, in the opinion of respondents, being more prominent in companies.

The most notable response was management of the poisonous and dangerous residues through authorized agents, with 36% of responses. Respondents consider, in general terms as the main action they are doing the companies.





Below are all the others, such as the use of alternative coatings (powder, water-based, natural endings, etc.) (25%), Standardization of materials materials low impact energy content (with another 25%) or analysis the proper energy consumption, identifying potential savings (with 23.7%).

On the bottom of the table, only 11% of respondents think that companies are developing a campaign of information and train employees to promote energy saving.

	ES	IT	FR	UK	HU
Management of the residues through expert agents.	52%	19%	28%	30%	42%
Standardisation of materials, materials and low-impact energy content.	18%	21%	35%	19%	15%
Use of alternative coatings (powder, water-based, natural endings, etc.)	19%	24%	25%	33%	8%
Analyse the proper energy consumption, identifying potential savings.	28%	15%	14%	22%	42%
Reduction of the packing for transport to the maximum	18%	13%	26%	22%	46%
Control of emissions of organic solvents in the atmosphere.	25%	14%	18%	30%	23%
Re-use the waste in order to process as new raw material or as energy source	15%	15%	26%	26%	23%
Greater control and inspection of the storage	23%	12%	14%	22%	35%
Water Treatment systems cleaning of gluing.	22%	8%	25%	44%	12%
Have good management in warehouse stocks.	28%	10%	12%	4%	23%
Non-use of coating materials that contain heavy metals.	16%	10%	31%	26%	4%
Acquire machinery efficiently to prevent uncontrolled consumption.	11%	14%	20%	15%	31%
I Don´t Know	8%	18%	17%	4%	8%
Develop a campaign of train to promote energy saving.	12%	7%	11%	19%	12%
Companies are not doing any type of action.	3%	6%	5%	0%	12%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
Management of the residues through expert agents.	44%	25%	15%	7%	9%	100%
Standardisation of materials, materials and low-impact energy content.	22%	40%	28%	6%	5%	100%
Use of alternative coatings (powder, water-based, natural endings, etc.)	23%	45%	19%	11%	2%	100%
Analyse the proper energy consumption, identifying potential savings.	37%	29%	12%	8%	14%	100%
Reduction of the packing for transport to the maximum	25%	27%	23%	8%	16%	100%
Control of emissions of organic solvents in the atmosphere.	34%	30%	16%	11%	8%	100%
Re-use the waste in order to process as new raw material or as energy source	22%	35%	25%	10%	9%	100%
Greater control and inspection of the storage	35%	28%	14%	9%	14%	100%
Water Treatment systems cleaning of gluing.	34%	18%	25%	18%	5%	100%
Have good management in warehouse stocks.	48%	27%	13%	2%	10%	100%
Non-use of coating materials that contain heavy metals.	27%	25%	34%	12%	2%	100%
Acquire machinery efficiently to prevent uncontrolled consumption.	19%	38%	22%	7%	14%	100%
I Don´t Know	16%	56%	22%	2%	4%	100%
Develop a campaign of train to promote energy saving.	32%	29%	18%	13%	8%	100%
Companies are not doing any type of action.	17%	50%	17%	0%	17%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

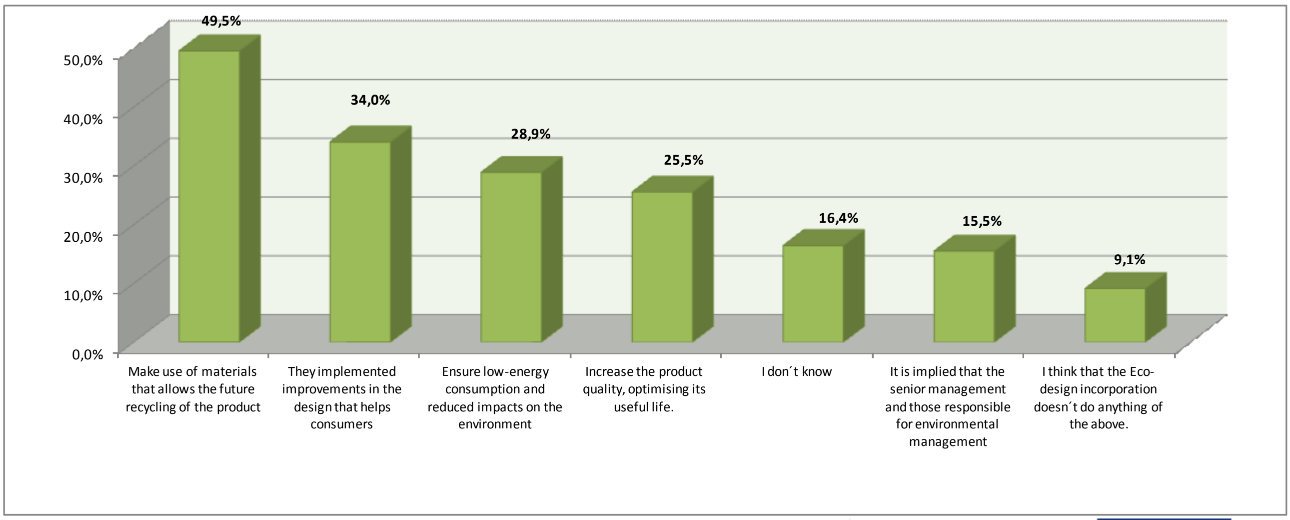
The eighth question at the survey was:

"There are companies that incorporate eco-design in their products, what do you think they may be assuming?"

Choose as many as you like

- A • They implemented improvements in the design that helps consumers to assess their buying decision.
- B • Make use of materials and substances that allows the future recycling of the product, by selecting materials of low environmental impact.
- C • Increase the product quality, optimising its useful life.
- D • It is implied that the senior management and those responsible for environmental management, production and marketing.
- E • Ensure low-energy consumption and reduced impacts on the environment during production and use of the product.
- F • I think that the Eco-design incorporation doesn´t do anything of the above.
- G • I don´t know

We had enough interested in the respondent's view about what may involve the incorporation of Ecodesign in their products, the most prominent response was that companies are making use of materials and substances that allows the future recycling of the product, by selecting materials of lower environmental impact, with 49.5%.



Also highlights the response, with 34%, which may mean ecodesign implementes improvements in the design that hepls consumers to assess their buying decision.

On the negative side we see a 16.4% of respondents who said that he does not know what to assume ecodesign in the company. This fact remains the same until the companies up to 50 employees. From that company size, the percentage of respondents who answered that they do not know is much lower, at only 8%.

	ES	IT	FR	UK	HU
Make use of materials and substances that allows the future recycling of the product	52%	41%	42%	37%	38%
They implemented improvements in the design that helps consumers to assess their buying decision.	30%	25%	38%	44%	23%
Ensure low-energy consumption and reduced impacts on the environment	34%	18%	29%	19%	31%
Increase the product quality, optimising its useful life.	23%	22%	25%	22%	19%
I don´t know	10%	17%	18%	0%	19%
It is implied that the senior management and those responsible for environmental management,	25%	6%	11%	7%	27%
I think that the Eco-design incorporation doesn´t do anything of the above.	7%	10%	5%	11%	8%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
Make use of materials and substances that allows the future recycling of the product	33%	39%	17%	6%	6%	100%
They implemented improvements in the design that helps consumers to assess their buying decision.	28%	34%	22%	11%	5%	100%
Ensure low-energy consumption and reduced impacts on the environment	37%	29%	20%	5%	8%	100%
Increase the product quality, optimising its useful life.	27%	40%	19%	7%	6%	100%
I don´t know	19%	50%	22%	0%	9%	100%
It is implied that the senior management and those responsible for environmental management,	49%	20%	14%	4%	14%	100%
I think that the Eco-design incorporation doesn´t do anything of the above.	23%	50%	10%	10%	7%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

5. OPINION

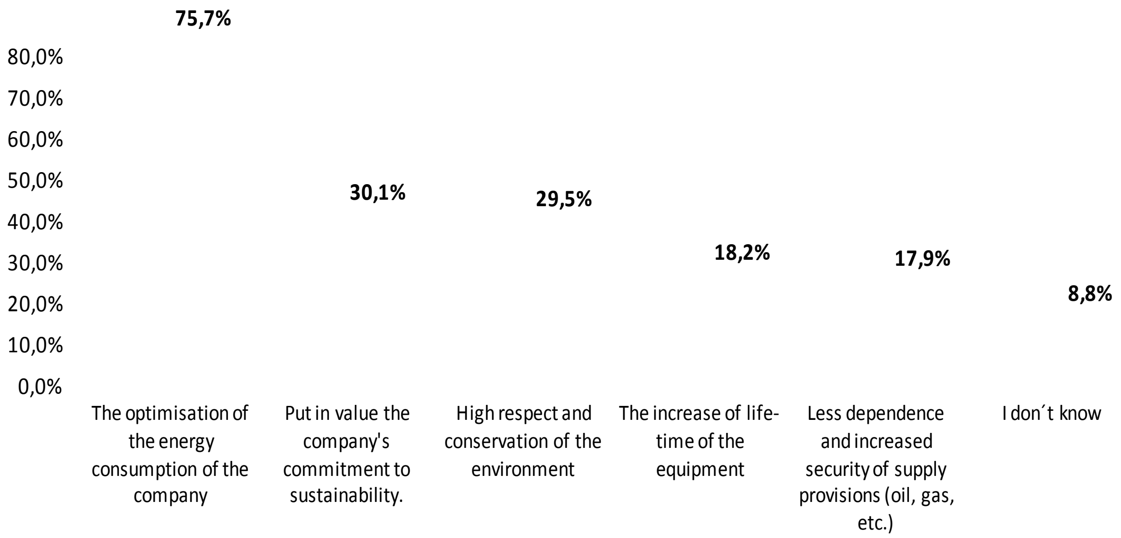
The ninth question at the survey was:

"In your point of view, the objective/s that sector companies are looking to reach, with the implementation of energy efficiency measures, are:"

Choose as many as you like

- [A] • High respect and conservation of the environment, since, they did not consume more energy than necessary, CO2 emissions have decreased.
- [B] • The optimisation of the energy consumption of the company, which translates into a reduction in costs and greater competitiveness of the companies.
- [C] • Less dependence and increased security of supply provisions (oil, gas, etc.)
- [D] • The increase of life-time of the equipment ensuring that it works under the best conditions, avoiding over sizing.
- [E] • Put in value the company's commitment to sustainability.
- [F] • I don´t know

This question was to know the opinion of respondents on the specific objective of the companies in the wood and furniture sector to implement specific measures savings or energy efficiency.



For many respondants, more than 7 in 10, specifically 75.7%, believes that energy efficiency measures implemented by the sector companies seek to optimize energy consumption, which means lower costs and increased competitiveness.

The following responses we have received, less prominent have been the put it value the company's commitment to sustainability, with 30%, and greater respect for the environment and contributing to the improvement of global warming, since not consume more energy than needed CO_2 emissions are reduced, with 29.5%.

	ES	IT	FR	UK	HU
The optimisation of the energy consumption of the company	78%	52%	78%	74%	65%
Put in value the company's commitment to sustainability.	30%	17%	46%	30%	15%
High respect and conservation of the environment	36%	24%	20%	7%	31%
The increase of life-time of the equipment	19%	13%	14%	11%	35%
Less dependence and increased security of supply provisions (oil, gas, etc.)	17%	11%	17%	26%	27%
I don´t know	3%	15%	2%	0%	4%

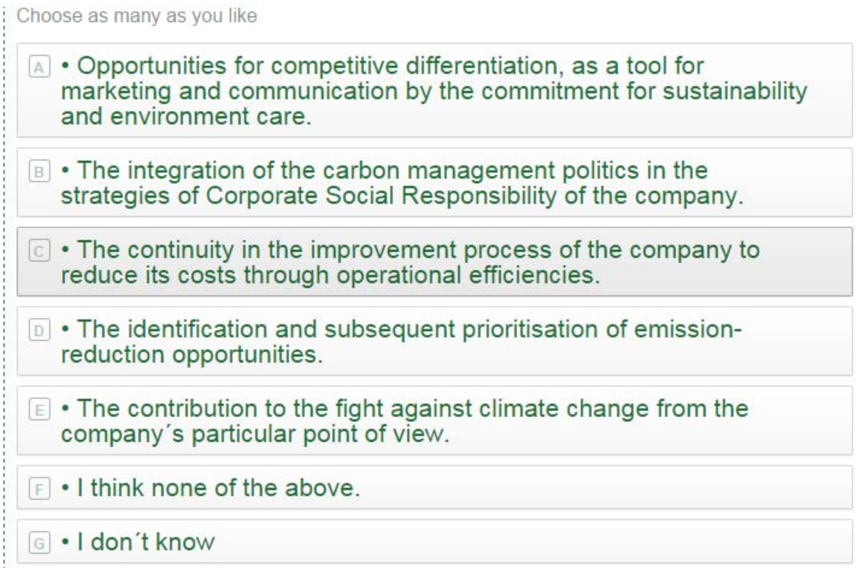
Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
The optimisation of the energy consumption of the company	32%	33%	20%	8%	7%	100%
Put in value the company's commitment to sustainability.	31%	26%	30%	8%	4%	100%
High respect and conservation of the environment	38%	38%	13%	2%	8%	100%
The increase of life-time of the equipment	32%	33%	15%	5%	15%	100%
Less dependence and increased security of supply provisions (oil, gas, etc.)	29%	29%	19%	12%	12%	100%
I don´t know	10%	83%	3%	0%	3%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

The tenth question at the survey was:

"The sector companies started to desire more knowledge on carbon footprint (measure of greenhouse gas emissions). Which, do you think, is/are the purpose/s they want to know more about it?"


Choose as many as you like

A • Opportunities for competitive differentiation, as a tool for marketing and communication by the commitment for sustainability and environment care.

B • The integration of the carbon management politics in the strategies of Corporate Social Responsibility of the company.

C • The continuity in the improvement process of the company to reduce its costs through operational efficiencies.

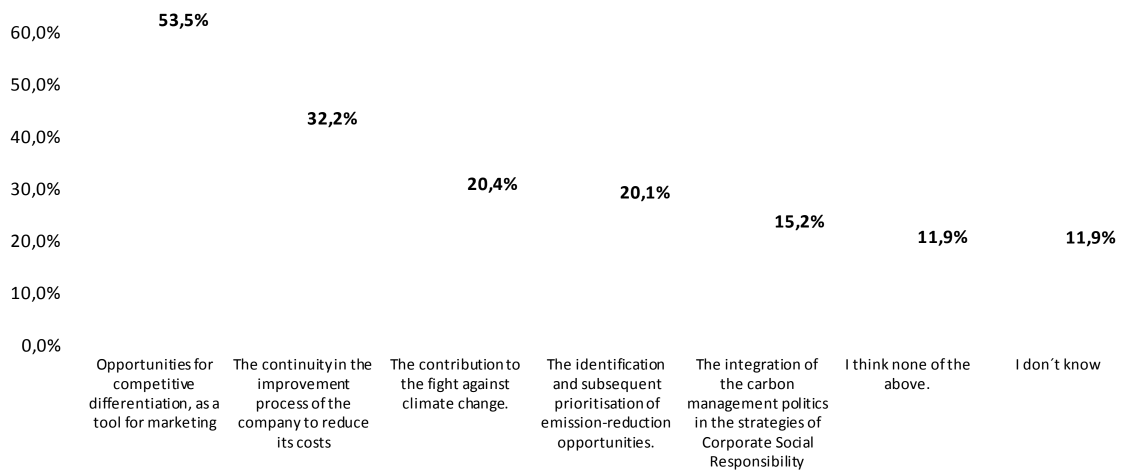
D • The identification and subsequent prioritisation of emission-reduction opportunities.

E • The contribution to the fight against climate change from the company´s particular point of view.

F • I think none of the above.

G • I don´t know

We did a question about why companies want to know their carbon footprint, measure of greenhouse emissions.



53% of responses that are directed to quantifying the carbon footprint is an opportunity for competitive differentiation as a tool for marketing and communications company, by the commitment for sustainability and environment care.

We also note that almost a third of respondents, specifically 32%, think about your carbon footprint is a further step in the process of continuity in the improvement process of the company to reduce its costs through operational efficiencies.

In contrast to other previous multiple choice questions in this question respondents have just answered, on average, one answer, which gives us think that they have not very clear the reasons, if any, of wanting to know footprint carbon in the company.

	ES	IT	FR	UK	HU
Opportunities for competitive differentiation, as a tool for marketing	54%	36%	69%	41%	35%
The continuity in the improvement process of the company to reduce its costs	33%	26%	26%	26%	31%
The contribution to the fight against climate change.	25%	11%	23%	15%	19%
The identification and subsequent prioritisation of emission-reduction opportunities.	17%	9%	26%	26%	42%
The integration of the carbon management politics in the strategies of Corporate Social Responsibility	20%	10%	11%	15%	12%
I think none of the above.	13%	9%	6%	11%	19%
I don´t know	8%	18%	0%	4%	8%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
Opportunities for competitive differentiation, as a tool for marketing	31%	32%	26%	6%	5%	100%
The continuity in the improvement process of the company to reduce its costs	32%	38%	16%	7%	8%	100%
The contribution to the fight against climate change.	39%	25%	22%	6%	7%	100%
The identification and subsequent prioritisation of emission-reduction opportunities.	26%	21%	26%	11%	17%	100%
The integration of the carbon management politics in the strategies of Corporate Social Responsibility	40%	32%	14%	8%	6%	100%
I think none of the above.	33%	36%	10%	8%	13%	100%
I don´t know	21%	72%	0%	3%	5%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

6. CONSEQUENCES

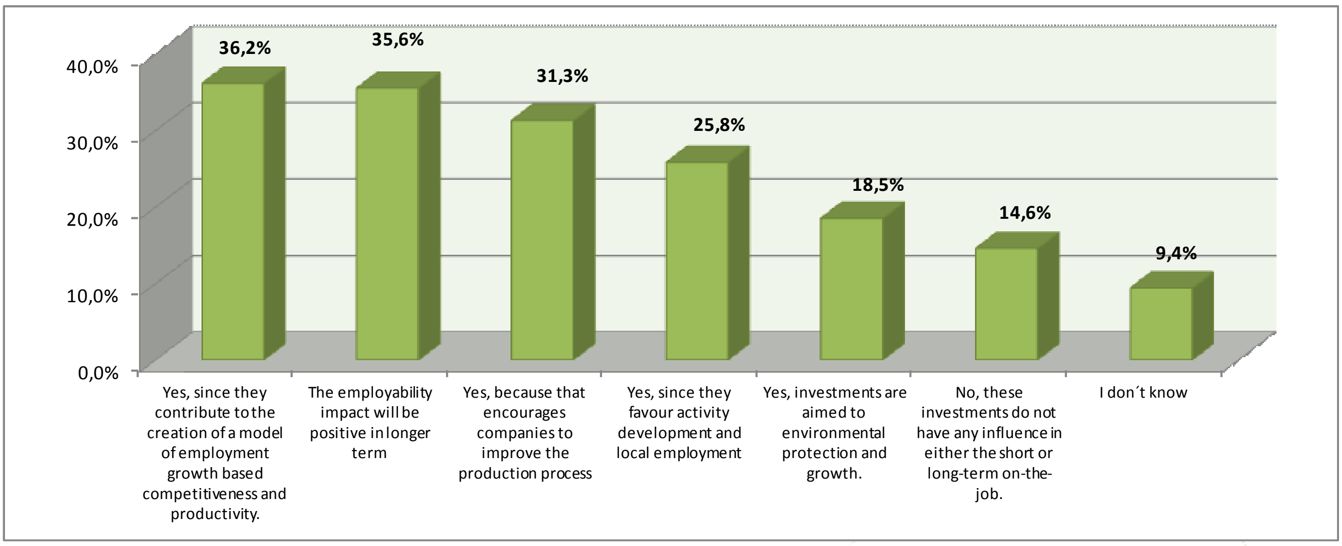
The eleventh question at the survey was:

"Do you think that the investments of the companies directed to the protection and progress of the environment might influence the employment of the sector?"

Choose as many as you like

- A. Yes, since they contribute to the creation of a model of employment growth based on companies competitiveness and productivity.
- B. Yes, investments aim to create enviromental protection and growth.
- C. Yes, because that encourages companies to improve the production process, increasing productivily.
- D. Yes, since they favour activity development and local employment, revaluing the own resources against imported goods.
- E. The employability impact will be positive in longer term, as a result of technological change, economic restructuring, etc.
- F. No, these investments do not have any influence in either the short or long-term on-the-job.
- G. I don´t know

One of the most important questions of the survey was to want know the opinion of respondents regarding whether the performance of environmental actions can have repercussions on employment and how it does.



If you look at the negative response of no influence on the use of making improvements aimed at protecting the environment, only 1 in 10 respondents (exactly 14.6%) has opined that the environmental investments NO influence short or long in employment.

By contrast 1 in 3, exactly 36%, think that these investments have a positive effect on employment because they contribute to the creation of a model of employment growth based on companies competitiveness and productivity.

Furthermore, 35% of respondents think that the impact on employment will be positive in the long term as a result of technological change or economic restructuring, and 31% think it will also influence Yes, because companies are encouraged to improve the production process, increasing productivity.

	ES	IT	FR	UK	HU
Yes, since they contribute to the creation of a model of employment growth based on companies competitiveness and	29%	30%	37%	44%	23%
The employability impact will be positive in longer term	39%	28%	25%	26%	38%
Yes, because that encourages companies to improve the production process	19%	33%	23%	44%	23%
Yes, since they favour activity development and local employment	20%	20%	35%	26%	15%
Yes, investments are aimed to environmental protection and growth.	15%	16%	14%	19%	27%
No, these investments do not have any influence in either the short or long-term on-the-job.	20%	5%	14%	11%	31%
I don´t know	7%	10%	14%	0%	0%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
Yes, since they contribute to the creation of a model of employment growth based on companies competitiveness and	25%	39%	20%	10%	5%	100%
The employability impact will be positive in longer term	34%	38%	14%	6%	9%	100%
Yes, because that encourages companies to improve the production process	18%	50%	15%	12%	6%	100%
Yes, since they favour activity development and local employment	24%	36%	27%	8%	5%	100%
Yes, investments are aimed to environmental protection and growth.	25%	41%	15%	8%	11%	100%
No, these investments do not have any influence in either the short or long-term on-the-job.	42%	17%	19%	6%	17%	100%
I don´t know	23%	48%	29%	0%	0%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

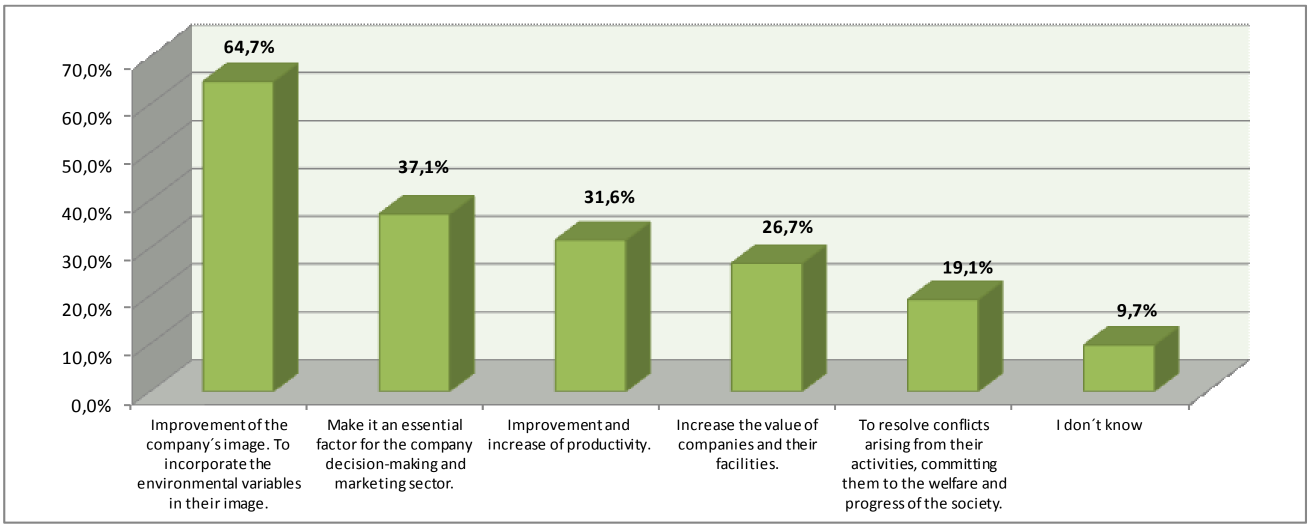
The twelfth question at the survey was:

"In your opinion, the sector companies that have adopted progress and protection of the environment in their managerial strategy targets have achieved:"

Choose as many as you like

- A Improvement and have seen an increase in productivity.
- B Make it an essential factor for the company decision-making and marketing sector.
- C Increase the value of companies and their facilities.
- D To resolve conflicts arising from their activities, committing them to the welfare and progress of the society.
- E Improvement of the company´s image. To incorporate the environmental variables in their image.
- F I don´t know

Finally we try to obtain the final opinion of respondents about what the companies have achieved that have committed to be more "green".



For most of them, in particular 64%, the main achievement of the companies in the wood and furniture sector have adopted into their business strategy aimed at improving environmental protection is improvement of the company´s image, incorporating environmental variables in their image.

But it also highlights with 37% companies have able to turn the objective of improve and protect the environment as an essential for decision-making and marketing the company factor.

	ES	IT	FR	UK	HU
Improvement of the company´s image. To incorporate the environmental variables in their image	66%	43%	74%	52%	69%
Make it an essential factor for the company decision-making and marketing sector.	30%	31%	43%	26%	31%
Improvement and increase of productivity.	23%	31%	20%	37%	38%
Increase the value of companies and their facilities.	22%	19%	35%	44%	4%
To resolve conflicts arising from their activities, committing them to the welfare and ... of the society	25%	8%	18%	19%	27%
I don´t know	6%	14%	3%	4%	4%

Table of the percentage of answers obtained in each country respect to the total responses from each country surveyed,

	ES	IT	FR	UK	HU	TOTAL
Improvement of the company´s image. To incorporate the environmental variables in	31%	31%	23%	7%	8%	100%
Make it an essential factor for the company decision-making and marketing sector.	25%	39%	23%	6%	7%	100%
Improvement and increase of productivity.	22%	46%	13%	10%	10%	100%
Increase the value of companies and their facilities.	25%	34%	26%	14%	1%	100%
To resolve conflicts arising from their activities, committing them to the welfare and	41%	21%	19%	8%	11%	100%
I don´t know	19%	69%	6%	3%	3%	100%

Table of the percentage of answers obtained in each country respect to the total responses from the five countries surveyed,

7. CONCLUSIONS

In conclusion we draw from the analysis of the survey results is that the improvements in companies aimed at protecting the environment contribute to the creation of a model of employment growth, based on competitiveness and productivity.

The companies believe, in general terms, they are contributing to the protection of the environment. The most important actions to carry out the management of waste and the use of certified wood, but obviously they can and must advance much more because they have a long way to go still, from being implemented in their production processes real measures of environmental improvement and energy saving, perhaps for lack of funding to undertake investments, need for staff training or absence incentive.

The investments of the companies to the protection of the environment contribute to the creation of a model of employment growth. Most companies comply with legal requirements on environmental issues, one of the aspects that improve sectorial qualification of human resources through training. The lack of information and training of human resources is an issue that has been repeated several times in the survey, so we can turn it into an opportunity where start working.