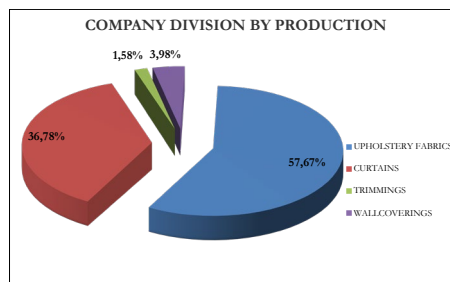




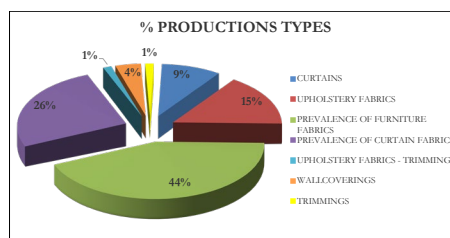
## THE ECONOMIC IMPACT OF PROPOSTE 2024

The **79** exhibitors participating at Proposte 2024 are broken down as follows: 31 Italian and 48 international, namely: 14 Belgian, 7 British, 7 Turkish, 6 Spanish, 4 French, 4 Indian, 2 German, 1 Austrian, 1 Swiss, 1 American and 1 Moroccan. They are all manufacturers of high-quality upholstery fabrics, curtains, trimmings and wallcoverings.

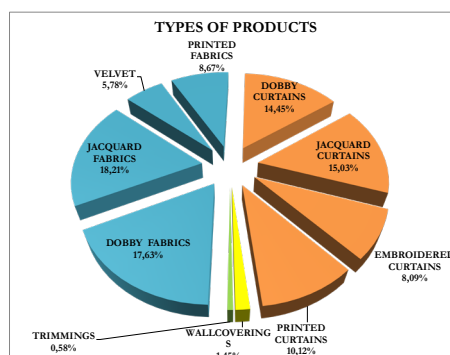
The 79 exhibitors make for total sales of more than **Euro 1.2 billion**.



Producers can be divided into two basic macro-groups: those who produce only **upholstery fabrics** (15%) and exclusive producers of **curtains** (9%). There are also other sub-groups that manufacture both types: **companies producing mainly upholstery** (44%), and **companies manufacturing mainly curtains** (26%). Last but not least, the new **wallcoverings** segment (4%) is represented by both manufacturers of **trimmings** (1%), and manufacturers of **upholstery and trimmings** (1%).



The **product range** includes typical textiles for furnishing and home design, and curtains; jacquard and upholstery fabrics for furnishings, jacquard and upholstery fabrics for curtains, velvets and embroidered fabrics. Finally, there are trimmings, ribbons, cords and wallcoverings.



Important data: **44%** of the companies market **flame retardant** fabrics, both for upholstery and curtains. In addition, as many as **63%** produce fabrics for **outdoors**, confirming the growing trend for this segment.



An analysis concentrating on the **qualitative features** of the textiles shows that high-end products are constantly gaining weight. More than **32%** of the products are high-end, and approximately **23%** are in the "luxury" category. The average quality range makes for **20%** of the total, while the extra-luxury segment (together with unique creations) increased to nearly **14%**. The remaining **11%** refers to plain fabrics in an endless range of colors and types for large-scale distribution, still in demand by a share of the furnishing market.

The average export percentage of Proposte producers stands at **63.74%**. The top **export market for Proposte** exhibitors is the United States (**14.82%**), followed by the UK, Germany, France, Italy, Belgium, the Netherlands and Spain.

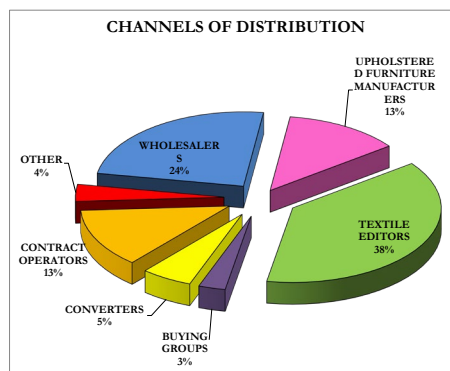


An analysis was carried out to consider the main processing techniques used by exhibitors, including the relevant percentages of in-house vs outsourced processing with proprietary machinery.

Exhibitors are mainly **textile mills (95%)** and in the majority of the cases they have proprietary looms (**98%**). The same holds for finishing (**81%**) and dyeing (**76%**). These steps are largely performed in-house.

Despite the trend in recent decades, some companies are verticalized and have in-house **spinning** and **twisting**.

In terms of **distribution channels**, **textile designers** play an important role (**38%**), followed by **wholesalers (24%)**, the **contract** sector also accounts for a significant market share (**13%**), on par with that of **upholstered furniture** manufacturers. The remaining **12%** is divided between **distribution chains**, **converters** and others.



**72%** of the fabrics presented at Proposte each year are used in the **home decoration** sector. The **contract sector (28%)** makes for a significant, steadily growing share. The hotellerie and yachting segments in particular use the technological textiles and curtains showcased at Proposte, in addition to restaurants, offices, theaters/cinemas, stores and means of transportation. In this regard, it should be noted that direct relationships with design studios/architects have been growing in recent years.