



EGYPTIAN FURNITURE SECTOR

A LOOK INTO THE FUTURE

EFEC EGYPTIAN
FURNITURE
EXPORT
COUNCIL

cwwfi Chamber of
Woodworking &
Furniture Industry
غرفة صناعة
الخشب وصناعة
الاثاث
٢٠١٤ ٢٠١٥

Prepared by:
**N GAGE
CONSULTING**

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Egyptian Furniture Sector:
A Look into the Future

1

Overview of Furniture Sector

History of Egyptian Furniture



King Tutankhamun's Golden Throne (1332-1322 BC)

Experts trace back the origins of furniture to the ancient Egyptians: the very first chair is said to have been invented by the ancient Egyptians. Around 6000 BC, Ancient Egyptian civilization was organized predominantly around the Nile Valley with advanced housing capabilities. Ancient Egyptian furniture was renowned for being light, durable and easily transportable. Most of the furniture found is constructed out of wood and adorned with ivory, gold, silver and ebony, pointing to a sophistication in furniture design and construction. As time went on, each era left its imprint on the sector, leaving behind one of the most dynamic and diverse industries.

Evolution of Egyptian Furniture

Old Kingdom

- Benches, tables, beds, chairs & tables
- Carpentry & gold sheaths encase furniture
- Introduction of wooden box
- High level of organization in living arrangements

2686 - 2613 BC



New Kingdom

- Emergence of luxurious furniture
- greater woodworking
- Highly prized pieces sent to rulers of neighboring countries

1550 - 1070 BC



Ottoman Empire

- Emergence of Arabesque style
- Introduction of calligraphy
- Greater strides in carpentry and embroidery
- Stronger emphasis on patterns and tiling
- Known for heavy metalwork

1517 - 1914



Modern Era

- Diverse sector
- Emergence of new materials
- Simplified design
- European influence

1960 - Present



2030 - 1640 BC



Middle Kingdom

- Emergence of more sophisticated trends in paint, gilt & veneers as well as design motifs
- Boxes customized to hold cosmetics, perfumes, oils & jewelry

800 BC - 600 AD



Greco-Roman Era

- Quality of furniture deteriorates
- Traditional Egyptian deities mixed with Aegean patterns & Hellenistic traits
- Art of woodturning flourished
- Highly skilled work emanating from Faiyum region

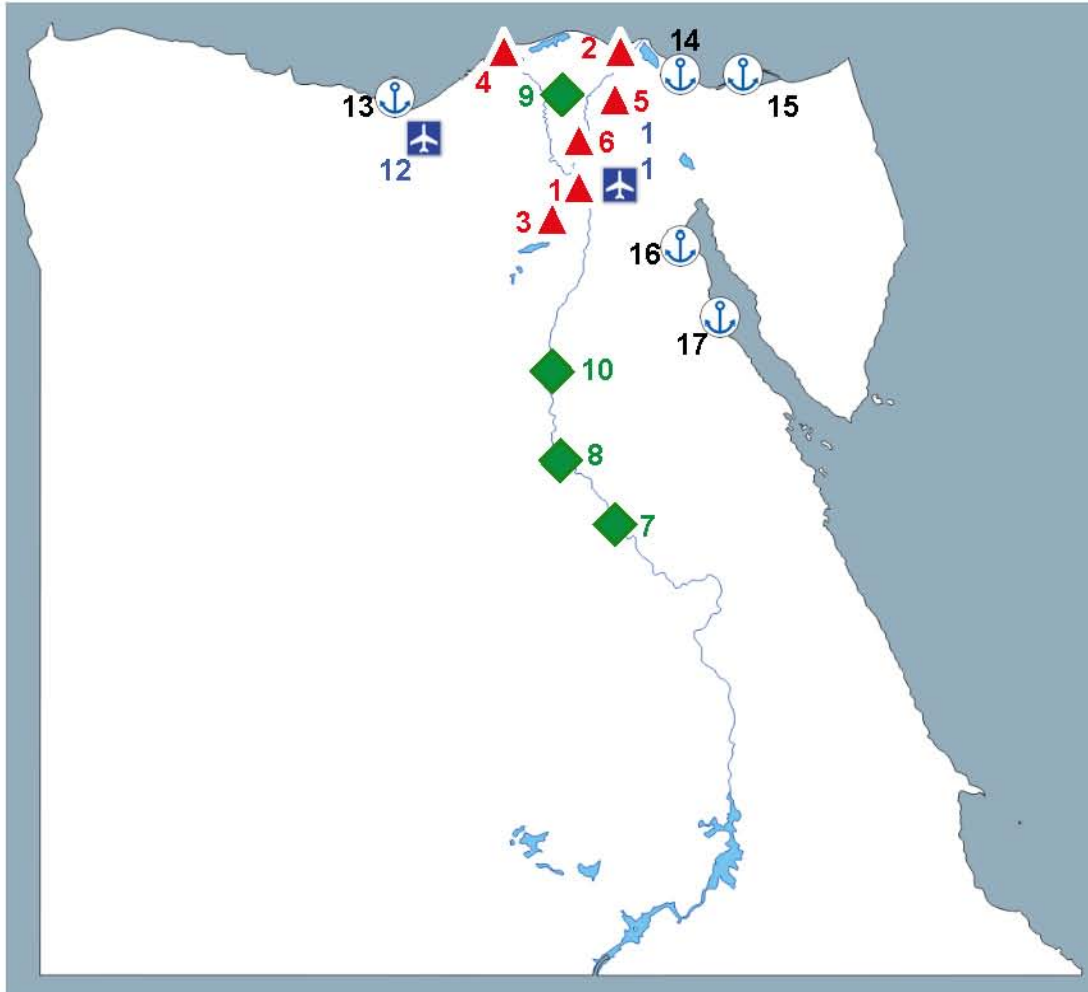
1789 - 1956



European Intrusion

- French Renaissance
- Egyptian Revival Era
- Empire furniture becomes increasingly popular in Europe & America
- Beginning of neoclassical era in furniture design

Production Hubs & Clusters



The furniture industry is one of Egypt's most dynamic sectors, with production and manufacturing clusters located all around the nation to take advantage of the diverse and superior craftsmanship available locally.

SPECIAL FOCUS ON DAMIETTA:

- The the largest of 6 hubs that make up the majority of the furniture sector in Egypt.
- Large cluster of workshops with highly skilled carvers who produce inlay and marquetry.
- Houses both wholesale and retail venues and is considered to be the entry point for wood imports.

Map Legend

▲ Production Hubs	◆ Clusters	✈ Main Airports	⚓ Main Ports
1. Cairo	7. Sohag	11. Cairo Airport	13. Alexandria Port
2. Damietta	8. Assyut	12. Al-Nozha Airport	14. Damietta Port
3. Giza	9. Gharbia		15. Port Said Port
4. Alexandria	10. Minya		16. Suez Port
5. Sharqiya			17. Ain Sokhna Port
6. Qalyubia			

Competitive Advantage

The Egyptian furniture sector is by far one of the oldest sectors and most promising sectors in Egypt. It continues to be a lucrative business opportunity and a solid investment due to the various advantages it enjoys.

- A **highly skilled labor force**, due to the historical and cultural significance of the craft, comprising **13% of the total work force of the manufacturing sector** in Egypt at **internationally competitive wages**.
- Immense comparative advantage due to its **strategic location**.
- Backed by a **solid foundation** of industries within its **supply chain**, creating **one of the largest and most cohesive value chains** in the Egyptian industry, including the production and manufacturing of chemical products and metal parts, wood, glue, foam, painting, fittings, machinery and the general development of craftsmanship across various sectors.



420,000 direct workers

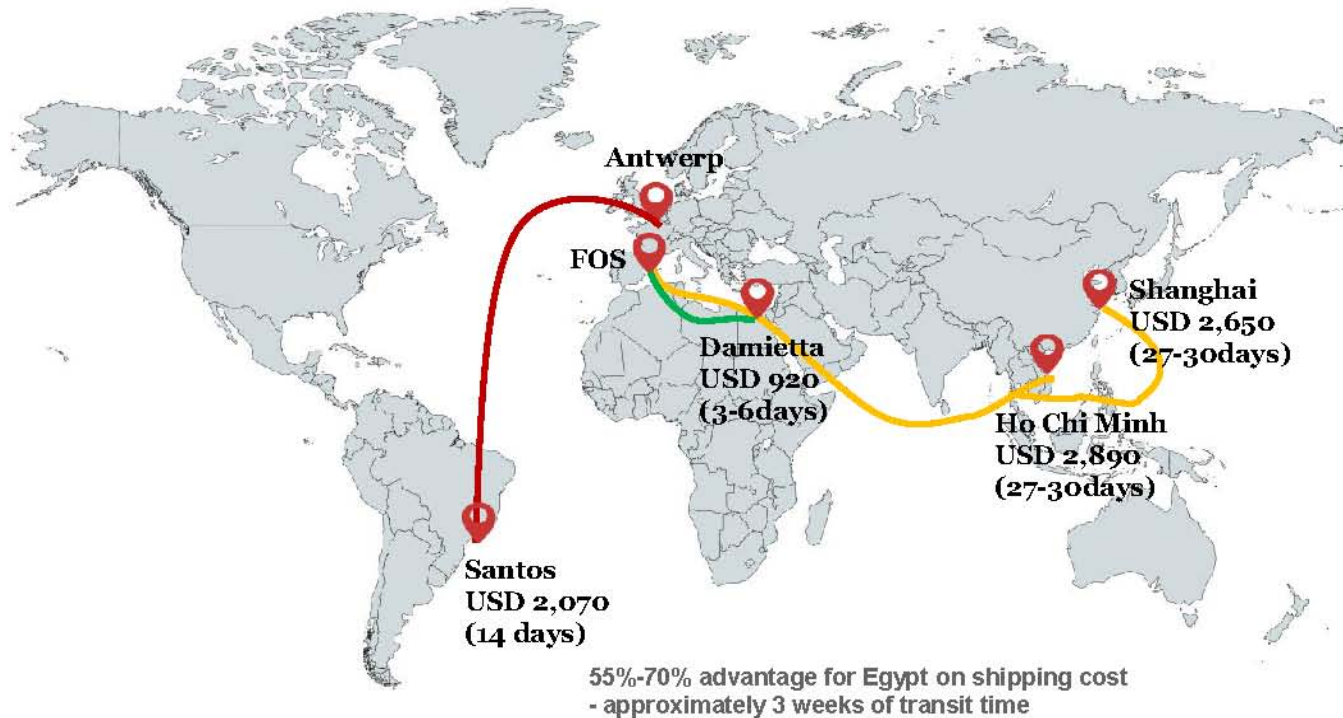


Average wage \$171/Month



120,000 Industrial
& Commercial Institutions

Competitive Advantage



Egypt's strategic location as well as its business culture, which is largely influenced by European business models, has played a great role in facilitating business transactions across the globe.

The fast-growing infrastructural landscape of the main industrial hubs, mainly comprised of highways, freight rail lines and airports, has greatly facilitated the trade due to its strategic location, giving the market a comparative advantage due to shipping cost and time.

Styles of Furniture

CLASSIC FURNITURE

This style of furniture features luxurious pieces in sophisticated designs. It requires highly skilled workers with an eye for details.



MODERN FURNITURE

This particular style of furniture is largely known for its simplicity. It is usually easy to dismantle and reassemble, making it easy to transport and ship.



ETHNIC FURNITURE

This style of furniture is inspired by the heritage and culture of the corresponding community. It includes but is not limited to Arabesque, Nubian and Ottoman-inspired furniture.



CONTEMPORARY FURNITURE

This style of furniture achieves a perfect balance between simplicity and elegance. It combines the luxury of the classic style with the functionality of the modern style.





Egyptian Furniture Sector:
A Look into the Future

2

Overview of Furniture
Companies' Projects

Residential

Government

Educational

Cultural

Hospitality

Commercial

Retail

Medical



Private Residence, UAE



Residential Palace, KSA



Kempinski Hotel, Egypt



Nile Cruise, Egypt



Restaurant, Belgium



National Family Allowance Office Paris, France



Bibliotheca Alexandrina, Egypt



Marriott Renaissance, Egypt



Arab Organization Headquarters, Kuwait





Presidential Theater, Turkmenistan



Malvern College, Egypt



Mercedes Benz Headquarters, Egypt



The Chocolate Gate, Kuwait



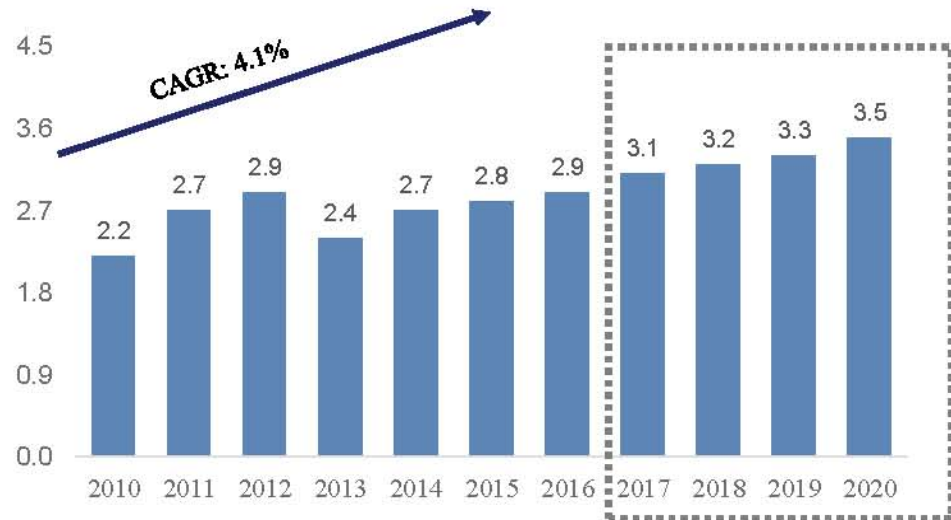
Egyptian Furniture Sector:
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Contribution To The Egyptian Economy

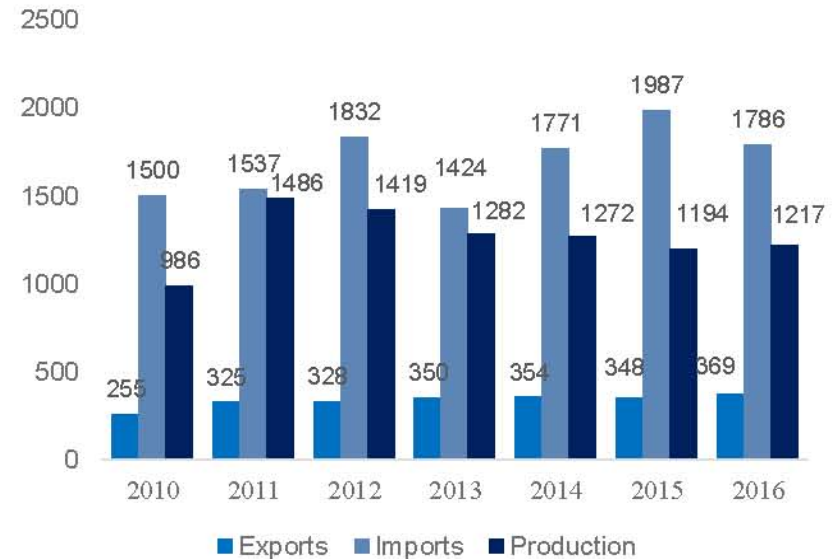
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Facts and Figures

Furniture Market Size | USD Million



Production, Import and Export | USD Million

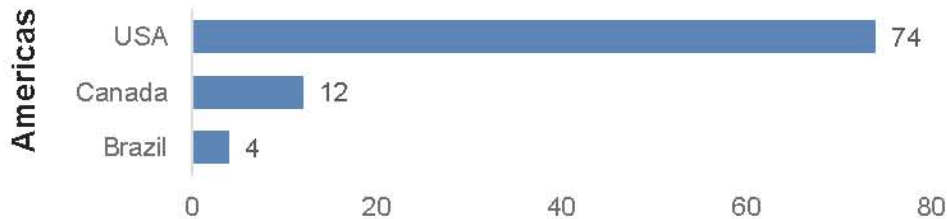
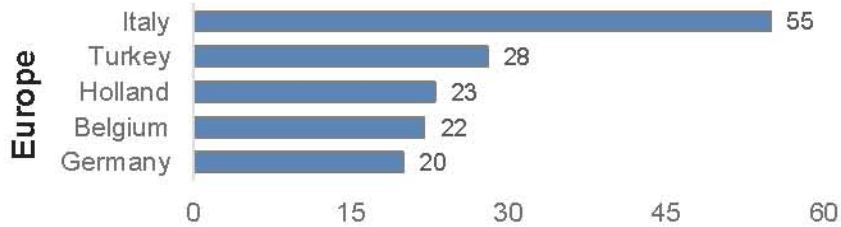
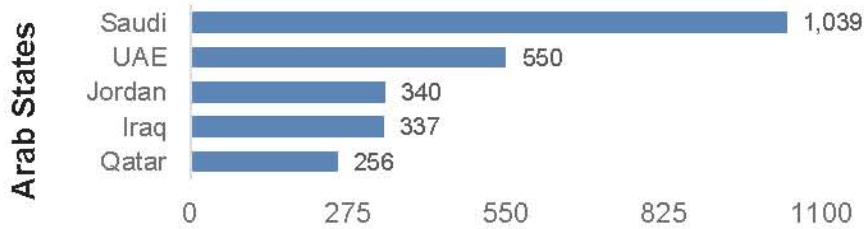


Commentary

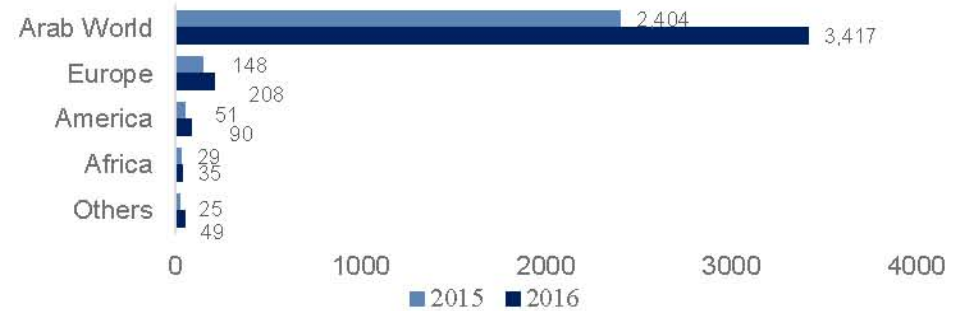
- Strong demand for Egyptian furniture from MENA countries has largely fueled the sector's growth since 2010 and enabled the sector to weather the turbulent times since the January 25th revolution.
- Prior to 2009, the Sector registered the highest CAGR globally, experiencing a 7-fold growth thereby validating its competitive advantage and highlighting the extent of its potential to substantially contribute to Egypt's economy. (2004: USD 45 mn - 2009: USD 300 mn)
- In 2015, the furniture sector market size grew by 27% since 2010.
- Due to the high potential of the Egyptian furniture sector, it was projected that the market size will reach to USD 3.5 billion using CAGR of 4.1%. This is a safe assumption given the current political & socio-economic climate.

Facts and Figures

Top Export Destinations 2016 | EGP Million



Exports 2015 & 2016 | EGP Million

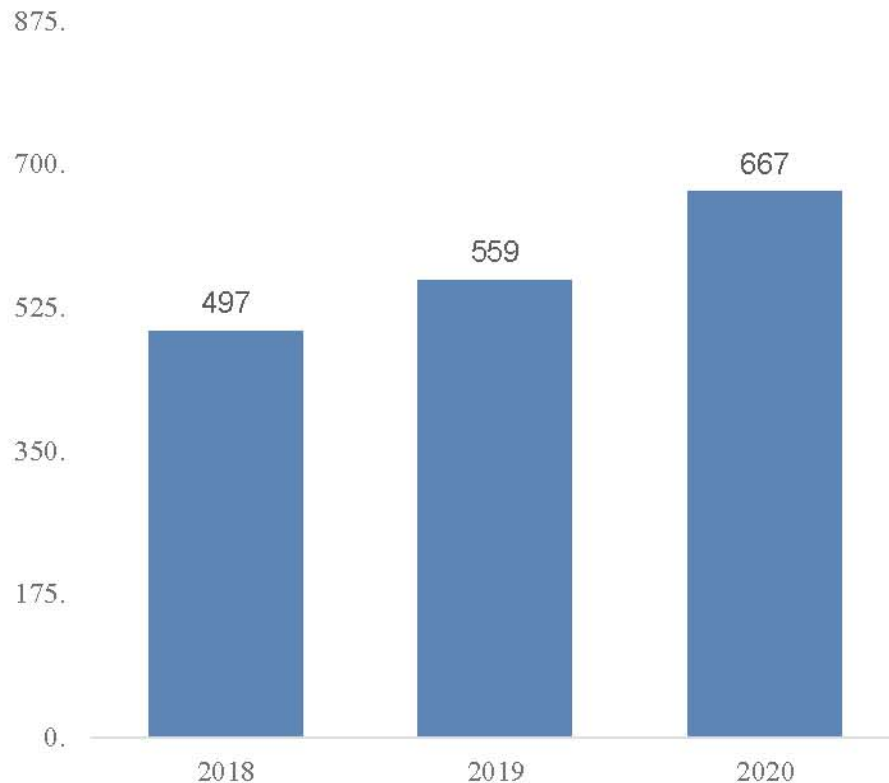


Commentary for 2016 Numbers:

- In 2016, exports grew by 43% from 2010.
- Saudi Arabia is the top Arab export destination, comprising 29% of total exports. The USA is the top non-Arab export destination, comprising 2% of total exports.
- In 2016, exports to European nations rose by 37%, to African nations by 5%, to the Americas by 75% and to the rest of the world by 96%.
- Exports to several destinations have exponentially increased: Iran by 240%, Sudan by 206%, Yemen by 197%, USA by 97% amongst others.

Facts and Figures

Forecast Exports Growth | USD Million

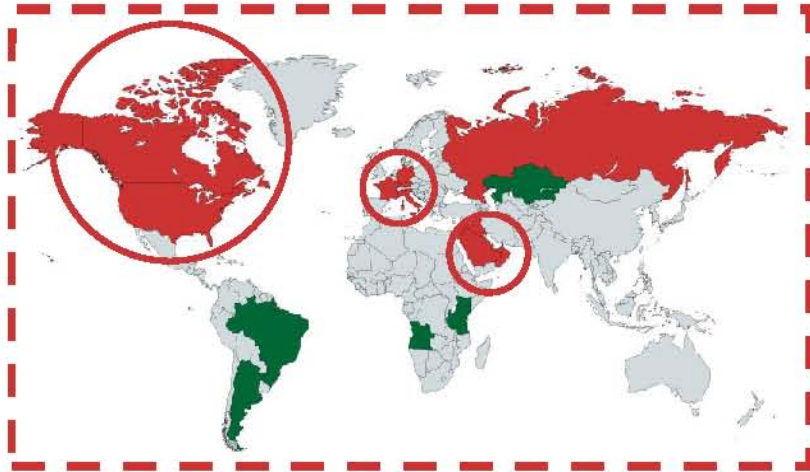


Commentary

- In 2017, export numbers are comparatively 48% higher for the month of January, 7% lower in February and 11% lower in March than for the same months in 2016.
- In line with Egypt's export strategy, which aims to enhance the capabilities of the manufacturing and production industries in effort to both development the industrial capacity of Egypt and alleviate the foreign currency crunch, the furniture sector aims to raise its exports to USD 667 mn by 2020; almost double its exports' volume in 2010.
- By leveraging the various trade agreements Egypt is party to, the furniture sector is looking to expanding its existing markets is has access to and entering new markets to fulfill their respective export targets.

Existing Export Markets

The Egyptian Furniture Sector has the potential to grow its footprint in the 11 major existing export markets



Europe

Russia
Germany
France
Italy



North America

USA
Canada



Middle East

Iraq
Qatar
Jordan
Saudi
UAE
Oman

Future Export Markets

The Egyptian Furniture Sector is targeting to expand to other promising market touching new regions



Latin America

Brazil
Argentina



Asia

Kazakhstan



Africa

Tanzania
Angola
Kenya
Nigeria

Trade Agreements

Common Market for Eastern and Southern Africa (COMESA)

✓ Provides access to around
380 million consumers.

European Union Partnership

✓ Provides access to more
than **500 million
consumers.**

European Free Trade Agreement (EFTA)

✓ Provides access to around
14 million consumers.

Greater Arab Free Trade Agreement (GAFTA)

✓ Provides access to
approximately **400 million
consumers.**

Aghadir

✓ Provides access to more
than **50 million consumers.**

Turkey

✓ Provides access to
approximately **77 million
consumers.**

Qualifying Industrial Zones (QIZ)

✓ Provides access to
approximately **96 million
consumers.**

Tripartite Free Trade Agreement (TFTA)

✓ Provides access to almost **1
billion consumers.**

Mercosur Agreement

✓ Provides access to around
262 million consumers.

Damietta Furniture City

Project objectives:

- Developing and enhancing the furniture industry through trainings, design, consulting expertise and enhancing the technical capabilities of the working forces.
- Establishing the city of Damietta as an integrated and comprehensive city **specialized in manufacturing furniture** and all related and complementary crafts as well as small and medium industries.
- Provide more (direct and indirect) **employment opportunities for youth** in all activities associated with the furniture industry complex.
- Enhance **marketing and promotion strategies** as well as offering marketing series for small and medium-sized enterprises (local and international), through permanent exhibitions of products for the local market as well as locating export opportunities
- Reduce the cost of production through the joint use of services and the presence of **a center for suppliers of raw materials**, which will serve to reduce the cost of raw materials, maintenance and operation.
- Provide **a network to act as a solid foundation** necessary for the development of the furniture industry and ensure the safety and security of the workers as well as inhabitants of the city.



Damietta Furniture City

Industrial Zone	Investment Zone	Services Zone
Small & medium-sized workshops (50-500 meters)	Financial and banking institutions	Clinics
Complementary industries zones	Restaurants and cafeterias	Security
Large Factories	restaurants and cafeterias for workshops	Public facilities
Storage facilities & warehouses	exhibitions, hotels and conference rooms	Religious facilities
		Public transportation





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Chamber of Wood Working & Furniture Industries

4

Introduction



The Chamber of Wood Working and Furniture Industries was established by Presidential Decree No. 453 of 1958 establishing industrial chambers

CWWFI is one of the industrial chambers affiliated to the Federation of Egyptian Industries Since its inception, The Chamber Of Wood Working & Furniture Industry [CWWFI] has been carrying out its responsibilities towards defending and supporting Egyptian Furniture industry, firmly believing that the industry is a vital and integral part of the sustainable development of Egypt.

Role

To this end, CWWFI effectively advocates the common interests of its members and coordinate their inquiries to change, reform and create new legislations and procedures with the governmental and legislative bodies, as well as coordinating several activities related to the development of the industry with local and international institutions, related to manufacturing facilities, industrial land allocation and industry development, training, industrial Design and R&D, Technology center, local and international trading and Exhibitions, quality assurance and material sourcing, customs regulations, tax regulations, labor force laws and enhancing SMEs activities and benefits.

Services

- Enhancing the Industrial Environment
- SMEs Development
- Deepening the industry and increase value-added
- Championing Productivity and Quality
- Environmental Protection and Management
- Sector TNA
- National Labor skills Development
- Technical Education and Skills Development
- Representation in Government Policy-Making Bodies
- Address sector issues and concern through CWWFI strategic Standing Committees
- Changing and formulating Industrial and Investments laws



Egyptian Furniture Sector:
A Look into the Future

5

Egyptian Furniture Export Council

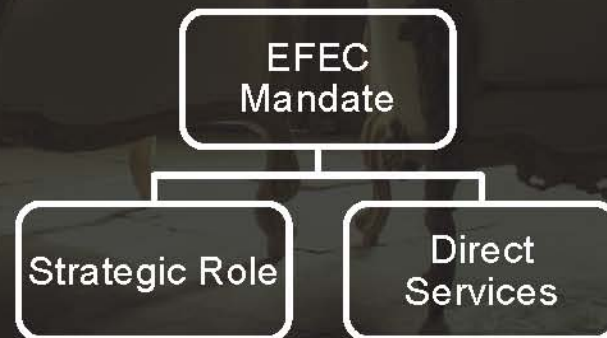
About EFEC

The Egyptian Furniture Export Council (EFEC) is an independent entity established by Ministerial decree from the Egyptian Ministry of Industry and Foreign Trade to support one of the fastest developing industrial sectors in Egypt. The established council, EFEC, would then serve as a supporting arm to producers through various capacity-building mechanisms in order to exponentially increase their productions capabilities thereby maximizing Egypt's ability to compete worldwide in the global market.

EFEC acts as an advisory board that proposes strategies and development plans to be implemented by the ministry to achieve the development of the industry and increase exports

In addition to the aforementioned mandate stipulated in the Ministerial Decree, aims to enhance the competitiveness of the Egyptian furniture industry through various services and activities including - but not limited to - offering business strategy consultancy, export opportunities, matchmaking services, updates on export-related regulations and trade agreements, assistance in locating and joining international exhibitions, in addition to organizing conferences, training seminars and workshops in collaboration with different local and international experts.

The multi-layered role of the EFEC includes both its responsibilities pertaining to the strategic planning of the industry as well as towards the business community operating in it.



EFEC Mandate

Strategic Role

Direct Services

EFEC Strategic Role

- The Council would represent the corresponding industry & business community vis-a-vis all local and international entities.
- Propose a clear strategy for the exports growth and set export goals with reasonable timeframes for the furniture sector.
- Propose and lobby for necessary regulations for the sector.
- Prepare studies and propose relevant plans, initiatives and programs, including a technical support arm.
- Study all current challenges and propose as well as lobby for sustainable solutions.
- Search for and obtain lucrative funding opportunities and technical support services for producers.
- Set up and operate a promotion division to create opportunities abroad and study new markets for Egyptian exports and determine the targeted markets.
- Pushing design as an important and strategic element for the industry development.

EFEC Mandate

Strategic Role

Direct Services

Export Services

Promotional Services

Research & Marketing
Intelligence

Export Services

- Identify target markets for exports and provide updated market studies on regular basis.
- Provide updates on export-related regulations, trade agreements and news.
- Prepare bi annual exports and imports reports for the furniture sector.
- Provide a step by step export manual for members and potential exporters.
- Provide one to one advice and consultancy services for members for selecting target markets, potential products, service providers and exports activities.
- Revise and approve the required documents which allow companies to benefit from the exports supporting system and help companies with any obstacles with EDF.
- Solve EFEC members direct problems with the different governmental entities such as – but not limited to - Customs, GOEIC, EDF and IDA.

EFEC Mandate

Strategic Role

Direct Services

Export Services

Promotional Services

Research & Marketing
Intelligence

Promotional Services

- Provide exports opportunities and circulate them among EFEC members.
- Organize inward buyers' missions and provide matchmaking services.
- Propose the annual exhibitions and trade missions plan according to the targeted markets and monitor the execution of this plan and evaluate the results.
- Prepare companies to be eligible to participate in international exhibitions and assist them in their participations and prepare reports about these exhibitions.
- Organize an annual exhibition (Furnex) on an international level that serves as a B2B forum and a hub for Egyptian exporters and manufacturers, also it qualifies companies and prepare them for international exhibitions.
- Provide international exposure for Furnex participants through inviting a number of selected international buyers and media.
- EFEC members benefits from the financial support system granted on the international exhibitions participation.
- Promote for EFEC member companies through various online and offline MarCom channels including- but not limited to - social media, printed and digital sector catalogues, international partner organizations and international ads specialized magazines.
- Provide special rates for members from different service providers such as banks, local and international magazines, shipping companies, photographers, designers and booth builders.
- EFEC website work as a marketing tool making all members' data and contacts accessible to buyers and international community.

EFEC Mandate

Strategic Role

Direct Services

Export Services

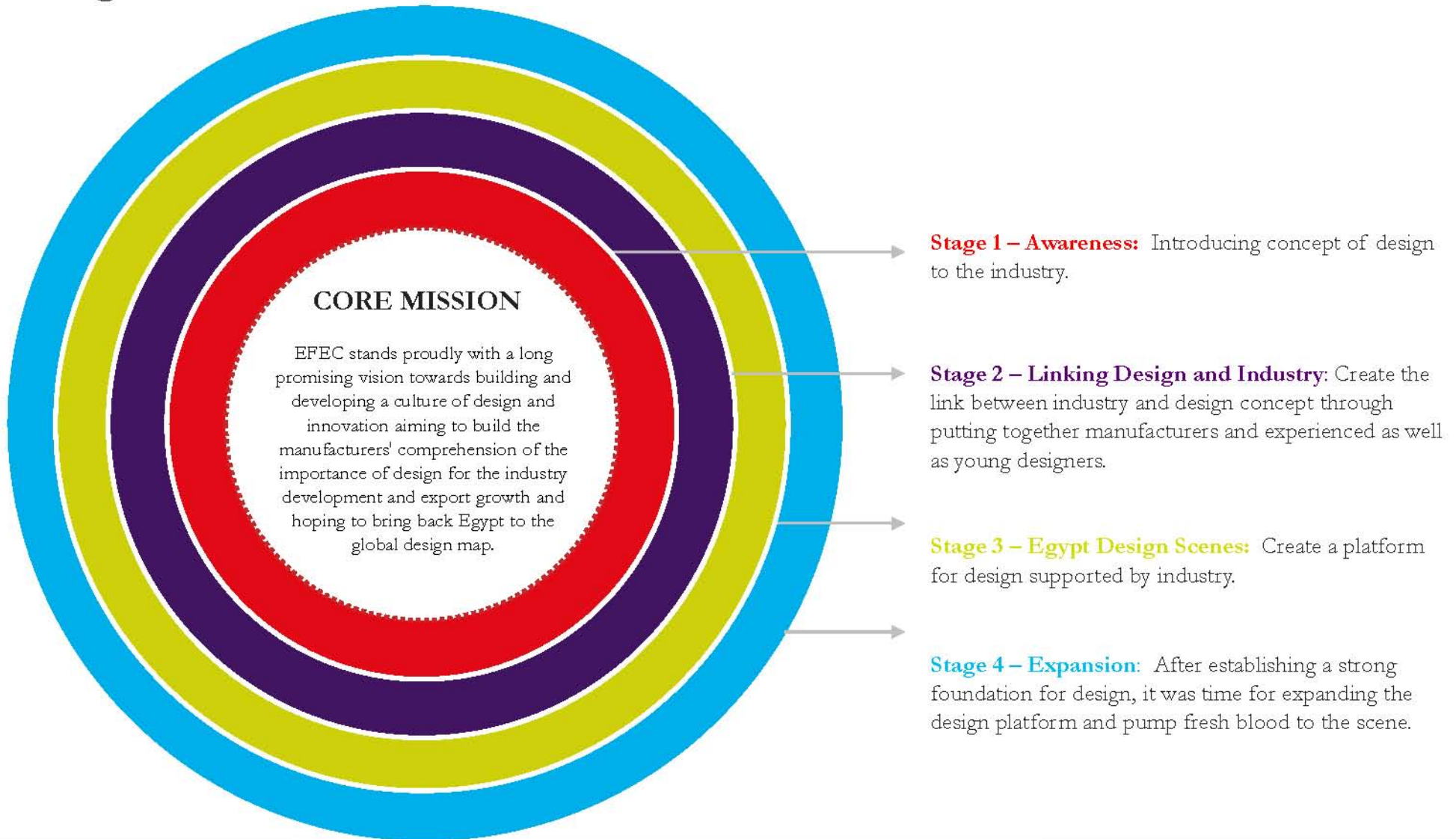
Promotional Services

Research & Marketing
Intelligence

Research & Marketing Intelligence

- Identify target markets for the furniture sector and the best practices to penetrate each market.
- Find, study and circulate new rules, regulations and official decrees related to the industry.
- Prepare a complete and updated database for all governmental entities, service providers, exporters, products, markets, regulations, exports opportunities, young and professional designers and any other related aspects available for EFEC members.
- Promote the importance of design for the industry development and export growth by organizing different initiatives such as workshops and design competitions with high profile figures in the design community both locally and internationally.
- Provide training programs and seminars technical and non-technical in collaboration with different local and international experts.
- Study EFEC new members and define their needs and capabilities in order to develop it and help them start exporting or increase their current exports if any.

Design Initiatives



Awareness

The Core

2006

This first project in 2006 aimed to highlight the diversity of local manufacturers as they began their collaborations with local designers. The output was featured in Furnex 2006.



The Platform

2007

“The Platform” was featured in FURNEX 2007. The design emphasis was taken to another level through projects with international designers like **Christophe Pillet**, who worked on several projects with local companies.



Karim Rashid Event

2007-2008

The year 2007 saw a high profile project with the internationally renowned designer Karim Rashid as he saw Egypt’s furniture industry “at a turning point”. He created a collection of products for five major manufacturers, which were featured in a special booth at the **Salone Internazionale del Mobile** in April of 2007.



Timeless Stories

2007-2008

The following year, “**Timeless Stories**” was in many ways a continuation of the work done in “the Core” and “the Platform”. It was the result of collaboration with **Alchemy studio** in Egypt and was featured at the **Salone Internazionale del Mobile** in April 2008



Linking Design and Industry

1st Design + Industry Workshop

2008 – 2009

In 2008, EFEC and CWWFI collaborated with Rhimal Design and the European institute of Design (IED) to organize the first International Design + Industry workshop in Cairo. The Workshop was led by a group of eight renowned international designers from Japan, USA, Europe and Egypt. They worked with a selected group of twenty young Egyptian designers together with twenty Egyptian furniture manufacturers to come up with innovative product lines.



Zaha Hadid

2009

With the title "Design with an Eye on the Future", a seminar for the late international designer Zaha Hadid was conducted in Cairo May 2009.



Launch of Kyme

2009

Kyme was the output of the first "Design + Industry Workshop. It is an Egyptian brand that was promoted during Salone Internazionale Del Mobile 2009 with a 300sqm stand designed by Karim Mekhtigian. The exhibition featured 38 prototypes realised by Egyptian and international designers - Lita Albuquerque, Daniel Dendra, Harry & Camila, Karim Mekhtigian, Tarek Naga, Shinichiro Ogata and Frans Schrofer - who developed seven different approaches to Egyptian design highlighting different aspects of the country.



Linking Design and Industry

Design Management Course

2010

Building on the Design+Industry workshop the design management courses tackled several design related modules. The modules were presented by experts from the IED and students were entitled to receive certificates from the IED upon completion of each module.



2nd Design + Industry Workshop

2009 – 2010

After the great success of the first Egyptian Design + Industry workshop; EFEC and CWWFI in collaboration with **Rhimal Design** and international experts from the **Istituto Europeo di Design Centro Ricerche (CRIED)** supported by the Industrial Modernization Centre (IMC) organized a second workshop that started early in 2010. The products/prototypes coming out were exhibited during **+20 Egypt design** in Cairo, June 2010.



Egypt Design Scene

+20 Egypt Design

2010

Coinciding with Furnex 2010, EFEC launched its new project **+20 Egypt Design**. It was an expositional urban design event in the historical atmosphere of El Muiz Street. The very best of Egypt's design talents along with the Egyptian manufacturers were on display generating a strong impact on the Egyptian business and culture scene. The interaction between designers, architects, manufacturers and international visitors helped to produce a multi-cultural concept that is the heart of furniture design.



Expansion

Design + Industry Competition 1

June 2012

All designers below the age of 35 were invited to participate with their product design ideas. They competed for the opportunity to have their ideas prototyped by reputable manufacturers and to be exhibited in the high profile Fumex fair 2012. Furthermore EFEC sponsored the presentation of 5 gold award winners to exhibit their prototypes in Milan's Salone Internazionale del Mobile in the **SaloneSatellite** section April 2013.



Design + Industry Competition 2

June 2013

Following the success of the First Design + Industry Competition in 2012, it was important to maintain the momentum by launching the second round of the competition. The output was featured in "The Furniture Show" event organized at CityStars. And for the second time, EFEC sponsored the presentation of 5 winners to exhibit their prototypes the **SaloneSatellite** 2014.



Expansion

Design + Industry Competition 3

December 2014

This competition had a different theme, allowing young entrepreneurs, designers and innovators with ideas for products, materials and techniques to be featured and have the opportunity to be tested in a high profile setting to get the right market feedback, and possibly the investment opportunities they are looking for. With forward thinking and innovation in mind, EFEC organized this competition with a special focus on 4 main themes with tremendous effect on the market for the coming years: **Green Thinking is the Future – Innovation in Technology & Materials – Promising Startup Ideas – Design Hub Incubatees**



Design + Industry Competition 4

June 2016

With the slogan “The Egyptian way to design” comes the Competition to stress on the Egyptian identity and to seek authenticity. This year’s competition was under the direction of **Giulio Cappellini** and **Luca Fois** who were part of the international board of Jury members.





One of the highlights of EFEC services is Furnex: an annual exhibition that has a great impact on the Egyptian furniture sector development. It is considered a meeting point for both local and overseas buyers together with the biggest Egyptian furniture manufacturers. The exhibition has occurred annually since 2004 and is held at the Cairo International Convention Center (CICC) with approximately 25,000 sqm dedicated to the event.

EFEC invites international buyers through the International Visitors Program (IVP) that sponsor buyers' visits to Furnex and offers assistance with all of their respective travel needs.

FURNEX has collaborated in 2017 with The Home to create the biggest exhibition in Egypt in the field.

Features:

- Wide range of furniture and furnishings
- Top manufactures and designers in the region.
- Special emphasis on contract furniture, design & objects.
- Over 200,000 visitors
- More than 200 exhibitors annually from Egyptian manufacturers from different sectors: Furniture, home textile, lighting, marble, flooring, utensils and handicrafts



For more information about Furnex please visit www.furnexegypt.com and for more information about the foreign buyers program please contact IVP@furnexegypt.com



Salone del Mobile, Italy



Equip' Hotel, France



Interiors Birmingham, UK



Ildex, Canada



Orgatec, Germany

International Participation: A Closer Look at the Egyptian Pavilion



Deco Fair, KSA



HD Vegas, USA



Mebel, Russia



Index Dubai, UAE



Maison & Objet, France



Maison & Objet, France

CLASSIC LOBBY

FURNEX
EGYPT 2009
WHERE IT ALL BEGAN
4-8 JUNE 2009
WWW.FURNEXEGYPT.COM

CRÉATIVITÉS
HAUTE
TECHNOLOGIE
ARTISANAT
MILLÉNAIRE

Equip' Hotel, France



Equip'Hotel, France

EGYPT
Fashioning the World

EGYPT
Fashioning the World

5A205

Sahara Shabira Fancy

Sahara Shabira Fancy

EGYPT
Fashioning the World

EGYPT
Fashioning the World



Index Dubai, UAE



EGYPTE

Meuble Paris, France

MEUBLES
D'EGYPTE
Salon A-1 (Paris)

E
GYP
T

LE TEMPLE DU CLASSIQUE

E
G
Y
P
T
E

E
G
Y
P
T
E



Meuble Paris, France



Orgatec, Germany



Salone Internazionale de Mobile, Italy



Salone Internazionale de Mobile, Italy

EGYPT

S29

S32

S30

S35

S37

S31

S36

S38

Salone Internazionale de Mobile, Italy

The Nile
floods once more
to *enrich* the land
with *creative energy*

The Egypt Design + Industry
Workshop was initiated by the
Egyptian Furniture Export Council
in December 2008.
This is the first step of an
extended process
towards establishing a relevant
and strong identity
for furniture and design
from Egypt for the world.

kyme
Rising from Egypt

Stage 1:
the brainstorm
Cairo 2008
Stage 2:
the identification
Milan 2009
Stage 3:
the realisation
Milan 2010

Kyme, the original name of Egypt
means the "Black Land"
and represents the rich soil of the Nile
valley. It is a metaphor for the "kyme"
to be formed from Egypt (2008),
which allowed designers to
contract and expand,
contrasting to the idea of flood
during the Nile River Flood.

chaos, pressure,
energy, choosing,
emergence, rising
design from Egypt
for the world

7 international designers
420 young designers
in a capital of modernity
= Kyme
rising from Egypt
with a new energy

sicea
THE EGYPTIAN DESIGN

si
HOT-01

Salone Internazionale de Mobile, Italy

MEUBLE EL CHARK

100 1944



Ildex, Canada



Thank You!

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