CBI MARKET SURVEY

The Natural Stone and Stone Products Market in Italy

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Report summary
This CBI market survey discusses the following highlights for the natural stone market in Italy:

Italian natural stone sector has been for a long time the global leader both in production and exports of natural stones, but has passed through an extremely difficult year. The level of industrial demand and consumption has been declining for the last decade whereas the world demand has been rising. Still Italy remains the first consumer of natural stones and is struggling with some successes to regain its former position. The imports of natural stones to Italy, which are characterised by a high ratio of intermediate products, are still currently stagnating. But developing countries, as traditional trading partners of the Italian natural stones sector, maintain a large share of the trade, not only in terms of intermediate products but also in terms of finished products.

This survey provides exporters of natural stone with sector-specific market information related to gaining access to Italy. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The Natural Stone and Stone Products market in the EU', which covers the EU market in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from http://www.cbi.eu/marketinfo

Note: In the chapters about consumption and production, we refer to 3 product groups:
- Blocks and Slabs
- Landscape Design
- Monumental and Funeral

The last group (Monumental and Funeral) is an aggregate of 2 sub product groups that will be addressed separately in the Import/ Export section: Flooring and Cladding and Funeral and other arts. For more explanation about the product group segmentation, please refer to the Appendix A of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

1 Market description: consumption and production

Consumption and industrial demand
- In 2004, the Italian consumption of natural stones products represented 39 million tonnes, of which 14 million tonnes of finished products worth € 2.2 billion (note: no value data for Blocks and Slabs)
- Due to a long tradition of stone extraction and processing, the Italian consumption per capita in square meters is the highest in Europe.
- In absolute value, Italy is also the biggest consumer in Europe with more than the half (51%) all natural stones consumed in Europe. It ranks in front of Spain (18%), Germany (9%), Greece (8%) and the UK (4%).
- It also consumes 7% of the natural stones worldwide production of natural stones, and is thereby the 3rd consumer after China and the USA.
- Italy consumes 54% of the Blocks and Slabs used in Europe and respectively 48% and 41% of the Monumental and Funeral stones and Landscape design products.
- The Italian consumption of natural stones can be characterised by a prevalent consumption of Blocks and Slabs (64%), followed by Monumental and Funeral (32%) and to a minor extend Landscape Design (4%). This high industrial demand for intermediate products is due to the importance of the Italian processing industry.

- Over the last five years, the Italian consumption has decreased by about 2%, but is slowly regaining dynamism.
- Since Italy has one of the most dynamic construction sector (+20% since 2000)[1] amongst the mature economies of the EU15, it is expected that the natural stones industrial demand and consumption keeps on slowly regaining vitality.
- The current slow bounce-back of the Italian consumption is mainly due to the increasing consumption of the Blocks and Slabs (+17% over 2002-2004). Still, the impressive growth of this product group hides high yearly fluctuations: +31% over 2002-2003 and +3% over 2003-2004.
- In parallel, the consumption of finished products is still globally on the decline (-3% for the Monumental and Funeral and +3% for Landscape Design), even if the figures are a bit more positive over the more recent period.

Table 1.1 Italian consumption split into product categories 2002 – 2004, Value in € million; volume in 1,000 tonnes.

	2002		2003		2004	
Product category	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Blocks and Slabs	18,725	-	24,489	-	25,321	-
Landscape design	1,469	331	1,500	337	1,573	354
Monumental building stones, funeral and other art	13,326	1,762	12,060	1,752	12,454	1,845

Source: Eurostat (2006)

Market Segmentation

The Italian market can be divided into the following segments of users of natural stone:

- Natural stone processing industry; processes blocks and slabs of natural stone into finished products to supply to the market segments below. Italy has important integrated processing companies of international dimension, even if they are currently heavily challenged by the import of cheap finished products from developing countries (DC).
- Building industry; using natural stone in a wide variety of applications for interior design as well as exterior coverings. The building industry is by far the biggest consumer of natural stone.
- Funeral industry; is a retail sector that sells funerary art as like tombstones, gravestones and urns to the consumer. Natural stone for funeral art is very common in Italy but only consumes a minor share (10-15%) of the natural stones products.
- Other retail (consumer market): include garden centres and interior design sector.

Consumption trends

- In Italy, natural stone is widely consumed. This is due to the fact that on the one side it possesses important local natural resources that have been exploited since the beginning of the 20th century. On the other side, important investment in technology has made natural stones products largely accessible.
- Still even if natural stones are widely consumed in Italy, it is characterised by high quality requirements in terms of stone processing and finishing. The artistic, architectural, and technicality features of natural stones products are important characteristics of the Italian consumption.
- More than 30 of the main players of the Italian stone industry have joined hands to create a trade mark “Pietra Naturale” in order to protect their production against ceramic imitation, to promote the “made in Italy” know-how and tradition against foreign competition and to maintain its share against other floor and wall covering

[1] Source: Stone 2006, World Marketing Handbook'

products. This is the expression of a sector that is trying to overcome a crisis and protect its shares.

Production

- In 2004, Italy produced 40,027 thousand tonnes of natural stones products, of which 16,000 thousand tones of finished products worth € 3,617 millions (note: no value data for Blocks and Slabs).
- Italy is the largest European natural stones producer with 51% of the total EU production, in front of Spain, Greece, Germany and Poland, which produce respectively 19%, 8%, 7% and 5% of the European natural stones.
- Blocks and Slabs account for 60% of the total Italian production, while finished products account for 40% (respectively 36% for Monumental and Funeral and 4% for Landscape Design).
- Italy has since long a central role in the marketing of natural stone, and is home to some of the EU's largest stone wholesalers, who stock enormous ranges of stone colours, styles, and qualities. These marketing giants tend to carry out huge stone inventories, where they buy domestic and imported standard raw blocks, instead of more expensive processed slabs or tiles, in order to reduce operating costs, and retain processing flexibility. Not surprisingly, two of the three major EU industry trade fairs are in Carrara and Verona (the third is held in Nurnberg, Germany). World famous producing areas are located in the Verona districts (Valpolicella and Valpantena), Carrara, Aosta and Rome.
- However, over the last 10 years the Italian production has stagnated, while the world production has more than doubled. The renowned Italian processing industry, severally challenged by the competition of imported low-cost finished products, is indeed undergoing a structural crisis which is symptomatic of a mature market and a struggled long-time leadership, despite the importance of it domestic market and its stone tradition. Foreign competitors have indeed benefited from the Italian technology that has been largely sold abroad: modern factories with the latest Italian technology have been set up in DC or in Europe and especially Spain. This has contributed to the decline of Italian market share. Most of the granite companies in the Carrara area have closed down and many in the Verona area are struggling.
- The safeguard of the processing industry depends on the capacity to reinvest in technology, research and services. The all sector is currently mobilised to restore the Italian stone industry.
- Many Italian companies are trying to invest in competing countries, to gain in competitiveness: closeness to the destination markets, lower production and running costs. The domestic industry continues to process highly technological products which are directed in particular to the domestic and the very demanding EU markets.[2]
- The streamlining resulting from the current crisis, the attempt to valorise the domestic natural resources and know-how, the strong world consumption trend and the increasing support for natural product are positive prospect for the future of the Italian stone industry.[3]
- As an early sign of a slow revival, the Italian production of natural stones has slowly regained dynamism between the years 2002-2004, an evolution that is mainly visible in the positive growth of the Blocks and Slabs industry.

[2] Source: www.stonereport.com
[3] Source: Stone 2006, World Marketing Handbook'

Table 1.2 Italian production split into product categories 2002 – 2004, Value in € million; volume in 1,000 tonnes.

	2002		2003		2004	
Product category	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Blocks and Slabs	17,536	-	23,312	-	24,124	0
Landscape design	1,598	362	1,594	362	1,655	376
Monumental building stones, funeral and other art	15,505	3,369	13,948	3,171	14,249	3,241

Source: Eurostat (2006)

- Some interesting Italian players for exporters in DC are listed below. Those companies do not per se represent the biggest actors in Italy, but illustrate how the Italian market is structured and what its requirements are.
    - **Max Marmi Carrara:** A producer and wholesaler of Italian intermediate natural stones products.
    http://www.maxmarmicarrara.it/index_eng.htm
    - **Stones companies association of Lombardia:** a regional stone association illustrating the range of activities of the Italian industry.
    http://www.assomarmistilombardia.it/eng/index.php
    - **Pareto Marny:** A company specialised on funeral art showing samples of specific Italian funeral art.
    http://www.marbly.net/marblygo.asp?Cod=1810

Opportunities and threats

\+ Italy is the biggest EU market for natural stones; finished stone products and more specifically for Blocks and Slabs.
\+ A very strong consumption tradition of natural stones products, sustained by a world-class processing industry on the one hand and by accessible high-quality finished products on the other side.
\+ The consumption of intermediate products has been affected by the crisis of the Italian stone sector to a lesser extent than finished products.
\- Consumption has been on the decline for the last decade whereas the world demand has been rising.
\- Local standard of finished products are very high in terms of technology, finish and design.
\- In order to recover from the local industry crisis, the sector is much more defensive towards foreign exporters than it used to be.

Note that the above mentioned opportunities and threats do not necessarily apply to your situation. Therefore, please use the developments and trends discussed in the previous chapters to make your own analyses. Let that determine whether the above mentioned opportunities and threats apply to your situation. For an example of such an analysis, please refer to chapter 7 of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

Useful sources

- **Marble From Italy**

http://www.marblefromitaly.com/
This site by the Italian Trade Commission Government Agency and provides information about the natural stones markets, industry standards and main Italian players.

- **Business stone**

http://www.bstone.it/
This site provides information on the Italian market of natural stones, with a review of worldwide news.

- **L'informatore del marmista**
http://www.zusieditore.it/index.asp
This professional magazine provides technical and application information relevant to the Italian market.

- **Giorgio Zusi Editore**
http://www.zusieditore.it/chisiamo.asp
A publishing house with a focus on cultural and promotional initiatives in the natural stone industry. Includes a list of publications on or related to the Italian natural stone sector.

2 Trade channels for market entry

For a precise description of the trade channel in the natural stones sector, please refer to chapter 3 of the CBI market survey 'The Natural Stone and Stone Products Market in the EU'.

Trade channels

The most important trade channels in Italy are:

- **Wholesaler/importers or distributors:** buy their natural stone directly from supplying countries. The market, shared by small to medium sized companies, that can be divided into two types; the ones catering to the building sector and the ones catering to the funeral industry.
    - **RED Graniti:** a company that imports and distributes at a European level.
    http://www.redgraniti.com/en/
    - **Block & Rock:** an importer of intermediate stone material from Asia and Africa
    http://www.blockrock.com/default.htm
    - **Marni bruno Zanet:** a company that imports, processes and distributes natural stones.
    http://www.brunozanet.com/
    - **Eastern Granit:** an importer of block that also owns several quarries and has exclusive supplying contracts.
    http://www.easterngranit.it/index.html

- **Natural stone processing industry:** buys from wholesalers/importers or distributors or depending on the size of the company directly from supplying countries. After processing these companies mainly supply to distributors and retailers.
    - **Pedretti Graniti:** processor of construction and decoration granite products according to Italian quality and design standards.
    http://www.pedrettigraniti.it/
    - **Fontanili:** a processor of natural stones products for the construction sector.
    http://www.fontanili.it/

- **Retailers**: mainly buy from wholesaler/importers or distributors; however large retailers are also known to buy from supplying countries directly.
    - **Omnia Marble:** a retailer of natural stones (imported or locally produced)
    http://www.omniamarble.com/
    - **MM group:** an example of large retailer that also import stones.
    http://www.mmgroupsrl.com/index.php

Price structure

Throughout the various trade channels, different prices and margins apply. The different prices per trade channel in the EU are almost identical in the different EU Member States. Therefore, please refer to chapter 3 of the CBI survey 'The Natural Stone and Stone Products Market in the EU' for an overview of prices and margins.

Selecting a suitable trading partner

- Wholesalers/importers and other importing parties in Italy either deal directly with producers in the supplying country or import through agents from the supplying country.
- The importer/wholesalers or processing industries that establish a direct relationship with producers are often bigger importing parties that can afford the extra costs of a direct relation (travel costs, translators etc.).
- The list below indicates internet sites where exporters can search for prospects in Italy in order to establish a direct contact with Italian importers.
    - **Italian directories**

      Marble From Italy: http://www.marblefromitaly.com/search.asp

      Marbly: http://www.marbly.net/
    - **International directories**

      Euro pages: http://energy-raw-materials.europages.net/en/

      Marble in The World: http://www.marbleintheworld.com/
- In numerous cases, Italian importing parties also use agents in the supplying country. These agents find producers and compare the quality and prices of the product keeping in mind what is requested by the importers in Italy. Therefore it is also sensible for producers from DC to get in contact with the agents in their own country in order to access the Italian market.
- Since the Italian natural stones sector is one of the leading in the world, a significant number of Italian companies also directly invest in foreign production countries.

3 Trade: imports and exports

Note: Because of unavailable data, this chapter does not take into account the possible impacts of re-export on the imports and exports flows to and within Europe.

Imports

Total imports

- In 2005, Italy imported 2,454 thousand tones of natural stones, worth € 524 million.
- Italy is the largest EU importer of natural stones (17% of all EU imports). It is closely followed by Germany (16%), the UK (15%), France (13%) and Spain (9%).
- Whereas the import growth rate of the above-mentioned EU Top 5 importers has increase by 7.5% over the 2002-2004 period, the Italian imports have been stagnating (+0.5%), and even decreased by 10% between 2002-2003, the most difficult years for the entire European natural stone sector.
- There is currently no indication of a strong improvement trend for the imports to Italy, even if the slow recovery of the Italian stone sector might pull the demand of imported products.
- A large share (74%) of the stones imported to Italy comes from DC. Italy is the largest European importer of natural stones from DC, thereby consuming 25% of DC supply.
- The share of DC in the Italian market has barely increased over 2002-2005, following the progression of imports from other partners.
- The DC India (18% of the imported value), Brazil (14%), South Africa (8%) China (8%) and Turkey (3%) are the most significant suppliers (See table 3.1 below).
- The importance of Brazil and other African partners, which supply on average higher value per tonne, seem to slightly increase to the detriment of Italy's traditional partner India.

Imports by product group

- As mentioned above, Italy mainly imports intermediate products (77%):
    - Blocks and Slabs: 77%, of which most of it comes from India, Brazil, South Africa and Norway. Those intermediates products are supplied mainly by DC (76%).

- Funeral and Other Arts: 10%. Here, China (32% of all Funeral and other arts imports to Italy), the USA (14%) India (12%) and are the most important providers.
- Flooring and Cladding: 8%. China, the UK, Brazil and India account respectively for 20%, 19%, 16%, 11% of the exports of DC to Italy.
- Landscape Design: 5%. DC provide the large majority (91%) those natural stones products to Italy, with China and Argentina sharing more then 72% or the whole Italian imports.

- Over the last decade, Italy has seen its imports of Blocks and Slabs declining whereas the import of finished products has increased significantly (up to 4.5 times). Italy, more than other European country, has suffered from the fierce competition of low-cost countries (mainly China, India, Brazil and Turkey) that now supply considerable amounts to the Italian construction industry.

Table 3.1 Imports by and leading suppliers to Italy 2002 - 2005, share in % of value

	2002 € mln	2003 € mln	2004 € mln	2005 € mln	Leading suppliers in 2005 Share in %	Share (%)
Total natural stones	521	338	411	524		
Intra EU25	79	204	197	72	Spain (3%), Portugal (2%), Findland (2%), UK (2%), France (1%)	14
Extra EU and DC	71	22	27	66	Norway (6%), USA (3%), Switzerland (1%), Canada (1%), Israel (0.4%)	13
From DC's	371	112	186	387	India (18%), Brazil (14%), South Africa (8%), China (8%), Turkey (3%), Egypt (3%), Zimbabwe (3%), Iran (2%), Argentina (2%), Saudi Arabia (2%)	74
Blocks and Slabs	452	94	121	404		
Intra EU25	58	42	47	43	Spain (3%), Finland (2%), Portugal (2%), Germany (1%), France (1%)	11
Extra EU and DC	66	13	18	55	Norway (8%), Switzerland (2%), USA (1%), Canada (1%), Australia (0.5%)	14
From DC's	328	39	57	306	India (21%), Brazil (16%), South Africa (10%), Zimbabwe (4%), Egypt (4%), Turkey (3%), Iran (3%), Saudi Arabia (2%), Angola (2%), Croatia (2%)	76
Funeral and Other Arts	35	120	128	52		
Intra EU25	13	80	74	11	Spain (8%), Portugal (3%), NDL (2%), Greece (2%), Fr Germany (2%)	22
Extra EU and DC	3	3	3	9	USA (14%), Switzerland (1%), Romania (1%), Taiwan (0.8%), U.A. Emirates (0.2%)	18
From DC's	20	37	51	32	China (32%), India (12%), Brazil (3%), Turkey (3%), Mauritius (2%), Tunisia (2%), Croatia (1%), Egypt (0,8%), Philippines (0.7%), Iran (0.5%)	60
Flooring and Cladding	20	105	129	42		

Intra EU25	6	77	74	15	United Kingdom (19%), France (6%), Spain (6%), Fr Germany (3%), Portugal (0.7%)	36
Extra EU and DC	2	4	5	1	USA (0.9%), Switzerland (0.7%), Romania (0.7%), Israel (0.6%), Bulgaria (03%)	3
From DC's	11	23	49	26	China (20%), Brazil (16%), India (11%), Turkey (6%), Iran (2%), Turkey (6%), Iran (2%), Egypt (2%), Tunisia (1%), Indonesia (0.4%), South Africa (0.3%), Morocco (0.2%)	61
Landscape Design	14	19	32	26		
Intra EU25	1	5	3	2	France (3%), Portugal (2%), Greece (1%), Utd Kingdom (1%), Germany (0.7%)	9
Extra EU and DC	0	2	1	0	Romania (0.2%), Bulgaria (0.1%), Switzerland (0.04%), Kuwait (0.03%), Canary (0.01%)	0
From DC's	13	13	28	24	China (40%), Argentina (32%), India (6%), Brazil (5%), Turkey (3%), Vietnam (3%), Mexico (1%), Croatia (0.2%), Ukraine (0.1%), Peru (0.04%)	91

Source: Eurostat (2006)
*Developing Countries

Exports

Table 3.2 Italian export of natural stone 2002 – 2005, Value in € million; volume in 1,000 tonnes.

2002		2003		2004		2005		Value '05/'00
Volume	Value	Volume	Value	Volume	Value	Volume	Value	
3,451	1,928	3,123	1,718	3,177	1,723	3,121	1,706	-11%

Source: Eurostat (2006)

- In 2005, Italy exported 3,121 thousand tones of natural stones, worth € 1,706 million.
- In this sense, Italy is the largest European exporter of natural stones at the EU level, representing 46% of total EU exports. Spain is the second largest exporter of natural stones with 24%, followed by smaller exporting countries such as Portugal (6%), Belgium (5%), Germany, France and Greece (each 3%).
- Between 2002 and 2005, the Italian exports have decreased by 11%. Over a decade, this trend has led to a drop (-21%) in the worldwide shares of Italian stones, a severe decline that has been especially visible in one of the Italian core business: finished stones. Significant traditional partners such as the USA or the Middle East have reduced the share of the Italian imports drastically, while the 25 EU countries continue to remain by far the most important sales market for Italy, of which the 12 new European member states[4] are the most dynamic.
- This drop has mainly affected the marble business while the granite trade has remained the same.
- Even if in 2004 and 2005 the national production seems to have regained dynamism, it has still not been translated into a recovery of its export potential. The Italian exports are indeed still suffering from the increased international competition and a struggling production sector, in need for streamlining.

[4] Bulgaria, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovenia, Slovakia.

Opportunities and threats

+ Italy is the most important EU importer of natural stones and depends on DC for about 75% of its supply of natural stones.
+ Italy imports significant amounts of intermediate products and mainly trades with DC. Moreover, it is has also shown a huge penetrability to lower-cost finished products from this area.
+ In order to restore its legitimacy of former worldwide stone leader, Italy is betting on higher quality products and therefore is inclined to increase highly-priced stones imports (and therefore more quality material) rather than cheaper material.
- Italian imports of natural stones are stagnating. It is difficult to judge how the current slow recovery of the Italian stone sector will pull the import in the near future.
- The share of DC in the Italian import is stable, whereas the European trend shows an increasing share of the supply coming from this area.
- For more technical finished product (namely Flooring and Cladding and funeral arts), DC are directly competing with traditional countries.

Note that the above mentioned opportunities and threats do not necessarily apply to your situation. Therefore, please use the developments and trends discussed in the previous chapters to make your own analyses. Let that determine whether the above mentioned opportunities and threats apply to your situation. For an example of such an analysis, please refer to chapter 7 of the CBI market survey ‘The Natural Stone and Stone Products Market in the EU’.

Useful sources

- Business Stone on Line

http://www.bstone.it/➔ go to `Statistiche´

- EU Expanding Exports Helpdesk

http://export-help.cec.eu.int/ ➔ go to: trade statistics

- Eurostat – official statistical office of the EU

http://epp.eurostat.cec.eu.int ➔ go to ‘themes’ on the left side of the home page ➔ go to ‘external trade’ ➔ go to ‘data – full view’ ➔ go to ‘external trade - detailed data

4 Prices developments

In most EU countries, the average unit price level of natural stone and natural stone products has been falling over the last 10 years. In Italy, this declining trend is valid for the export prices of raw material and especially for calcareous Blocks and Slabs, while the export prices of Italian finished products are stable.

The prices of natural stones imported to Italy are also globally on the decline: the prices of imported finished products has dropped by half in the last decade, the prices of calcareous Blocks and Slabs was also at its lowest level in 2005, while the price of imported siliceous Blocks and Slabs is 15% higher than its level 10 years ago.

Still this trend should be put into perspective with the fact that on the shorter term natural stones prices are fluctuating depending on the type of stones products (intermediate or finished), the stones nature, the product quality, the production costs, and exchange rates. Therefore is recommended to regularly check current prices of natural stones in Italy through direct contact with importers. Some indication of prices can be found on the following sites:

- http://www.findstone.com/
  ➔ go to ‘Price List´ in the `For buyers´ section
  ➔ Select the type of material, then scroll down to Italy.
- http://www.stonesource.com/
  ➔ go to ‘stone selector’ in the left side
  ➔ make a selection per material, price range or other criteria.

5 Market access requirements

As a manufacturer in a developing country preparing to access Italy, you should be aware of the market access requirements of your trading partners and the Italy government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns. You need to comply with EU legislation and have to be aware of the additional non-legislative requirements that your trading partners in the EU might request.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at http://www.cbi.eu/marketinfo, select natural stone products and Italy in the category search, click on the search button and click on market access requirements.

Additional information on packaging can be found at the website of ITC on export packaging: http://www.intracen.org/ep/packaging/packit.htm

Information on tariffs and quota can be found at http://export-help.cec.eu.int/
Information on eco-labelling and packaging legislation is included in the CBI market information database.

6 Doing business

General information on doing business like approaching potential business partners, building up a relationship, drawing up an offer, handling the contract (methods of payment, and terms of delivery) can be found in CBI's export manuals 'Export Planner' and 'Your image builder'. Furthermore cultural awareness is a critical skill in securing success as an exporter. Information on cultural differences in the EU can be found in chapter 3 of CBI's export manual 'Exporting to the EU'. These manuals can be downloaded from http://www.cbi.eu/marketinfo - go to search publications.

The international orientation of the Italian industry facilitates the approach of an Italian trading partner for exporters from developing countries. But it also means that high competitiveness is required. Also, since communicating issues are renowned to be a crucial aspect of a successful trading relation in the natural stones industry, it is recommended to pay a high attention to building a relationship based on trust and a high degree of professionalism.

Moreover, in a market where competition is fierce and margins are small, it is becoming increasingly important to be a reliable partner. Respecting delivery and quality conditions are crucial for your trading partner and necessary for developing a long-term business relationship.

Establishing a first contact with players of the Italian natural stones sector can be done through the numerous regional sector associations, but those could demonstrate a defensive attitude because of the critical situation of the Italian industry and because most of them exist to defend the interest of local producers.

Therefore, it is mostly recommended to visit Italian trade fairs or go for an individual approach after an internet search (Italian business directories or Italian or international specialised stones websites). One can also decide to go through an agent in his/her country, who will represent the products of his/her clientele at trade fairs.

Useful sources

- **Marble From Italy**
  http://www.marblefromitaly.com/
  This site by the Italian Trade Commission Government Agency and provides information about the natural stones markets, industry standards and main players.

- **CarraraMarmotec**
  http://www.carraramarmotec.com/eng-site/
  Site of one of the worldwide Italian famous stone fair trades.
- **Marmomacc**
  http://www.marmomacc.it/index.asp
  Italian international exhibition of stone, design and technology.

This survey was compiled for CBI by CREM.