



Assocomaplast

ITALIAN PLASTICS AND RUBBER PROCESSING MACHINERY
AND MOULDS MANUFACTURERS' ASSOCIATION



June 2004
AV

PRESS RELEASE

THE ITALIAN PLASTICS AND RUBBER MACHINERY INDUSTRY

The Italian manufacturers of plastics and rubber machinery, at the end of 2003, recorded a balance that can be said satisfactory, mainly thanks to the export and in particular to some expanding markets as China, Iran and Russia. On the other hands, perspectives for the running year still remain uncertain, mostly because of the flat national orders and sales.

In short, the summary aggregated data of the sector, represented by the concerned trade association Assocomaplast, for the past business year show that: production value grew by somewhat 3% in respect of 2002, from 3,65 to 3,75 billion euro, whilst export increased by 2%, almost reaching 2,15 billion euro. The sectoral import faced a considerable decrease (7%), stopping at 575 million euro and confirming the poor willingness of the Italian processors to invest.

As a consequence, the domestic market value (production plus import less export) remained practically unchanged, stopping under the value of 2,2 billion euro. The usual and great surplus of the trade balance further increased (almost 7%), thus reaching 1,6 billion euro.

According to the abroad sales and the relevant worldwide distribution it must be observed that, as along the past years, Europe, and EU significantly, still remains the most important trade area. As a matter of fact, in 2003, the Italian export was concentrated here, reaching 1,35 billion euro against 1,25 of December 2002 and the share on the total rose from 58,5 to 62,8%. In this context, as at world level, the first placement within the ranking of the most important outlets is occupied in a stable manner by Germany, where 404 million euro of plastics and rubber machines were shipped from Italy (almost 19% of the total), whilst on 2002 Italian sales were 333 millions. In this respect, it must be also remarked that homologue German manufacturers are both the main competitors and the greatest suppliers of the Italians: their export last year was 226 million euro, in decrease from the 273 recorded by 2002, meaning 44 instead of 39,3% on total sectoral import.

Assocomaplast is coming to underline as well that, according to the downturn in demand of plastics and rubber technologies along the past years, in Italy as in the principal European countries, the industries engaged in the production of machinery for producing semi-finished and plastics items have been interested by companies acquisition and aggregation phenomena never seen before. At the same time, a major engagement has characterised the Italian ones, moving faster to penetrate foreign markets, not only through commercial actions but also starting new deals on site: from China to India, from the States to Brazil.

So far, according to the rising global markets competition, the Italian machinery industry prepares to match with leader competitors and to differ from the new world players, which started similar machines production, being more aggressive under the price policy than in terms of technological levels and by supplying customers to fulfil their own needs.

In such a global context, the "K 2004" will represent for "our" companies an outstanding commitment of comparison on the German market but also and mainly with the huge flow of visitors coming from all over the world, with a desirable basket of new projects and consequent investments, it is to say confirming a real reversal of trend by looking for the purchase of new and more sophisticated plants and equipment for the processing of plastics and rubber.

It is not random that, since ever, the Italian attendance at the K show is the second largest



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one, only behind the local German exhibitors. On next October they will be around 440, over the 16% out of the total participating companies, covering some 30.000 sqm (19% of the entire net exhibiting surface).

Among them, the largest share will be represented by the Italian suppliers of machines, devices, moulds, mechanical components and electrical/electronic parts etc.: more than 250 companies, their booths exceed 20.000 sqm. They will show their most innovative offer to the multitude of international processors who will be ready to catch it for updating and making stronger their own output of plastics and rubber products, looking both to the volumes and the quality, maybe better...

ITALIAN MARKET FOR MACHINERY, EQUIPMENT & MOULDS FOR PLASTICS AND RUBBER PROCESSING

(million euro)	2001	2002	2003
production	3.800	3.650	3.750
export	2.367	2.091	2.141
import	679	617	575
domestic market	2.113	2.176	2.184
trade balance	1.688	1.475	1.566

MAIN DESTINATION MARKETS FOR THE ITALIAN MANUFACTURERS (% out of total export)

	2001		2002		2003
Germany	14,0	Germany	15,9	Germany	18,9
France	9,1	France	8,7	China	7,6
China	8,2	China	7,5	France	7,3
Spain	6,2	Spain	6,6	Spain	6,7
United States	5,9	United States	5,9	United States	6,3
United Kingdom	4,7	United Kingdom	5,5	Russia	4,3
Russia	4,1	Mexico	4,6	United Kingdom	4,2
Mexico	3,6	Russia	3,6	Turkey	3,6
Brazil	3,4	Brazil	2,9	Mexico	3,5
Benelux	2,9	Turkey	2,6	Poland	2,6
others	37,9	others	36,2	others	35,0
total	100,0		100,0		100,0

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