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Italian plastic machinery export drops in 2025

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Amoplast Study Center, a trade association affiliated with CONFINDUSTRIA that brings together over 170 manufacturers, estimates that the **Italian** industry of machinery, equipment, and molds for plastics and rubber closed the year 2025 with a decrease in production on the order of five percentage points, and with a value of EUR 4.4 billion.

Italian exports for the sector, which account for three quarters of production, also recorded a drop of 5%, coming in at just barely over EUR 3.4 billion.

Trade balance drops

Given these dynamics, the balance of trade is significantly reduced: after the record of 2.65 billion reached in 2024, it has slipped back to 2.24 billion.

The international context in 2025 was characterized principally by uncertainties caused by the introduction of tariffs by the Trump administration which, beyond the "reciprocal" component, raise the tariffs on steel and aluminum components in certain types of machinery, components, and molds for plastics and rubber.

The situation was worsened by the progressive devaluation of the dollar with respect to the euro. It deteriorated further with the outbreak of war in the **Middle East**, which has triggered an energy crisis that has already begun to have a strong negative impact on the European plastics and rubber processing industry by increasing the costs of natural gas, petroleum, and raw materials and generating uncertainties about the availability of materials.

This situation is the source of significant concern among Italian manufacturers of plastics and rubber processing machinery, with a host of factors that threaten to compromise the propensity for investment in the domestic market, both the Italian and the European market, and challenges in store with the implementation of the new European **Packaging and Packaging Waste Regulation (PPWR)**.

Exports data by country

Sales to Germany, which has always been Italy's prime trade partner, have fallen for the second consecutive year. Exports to processors in France, another major export destination in the EU, have also fallen off.

Within the top ten destination markets, these negative trends have fortunately been compensated by an increase in sales to Spain, Poland, and Romania.

On the other hand, Italian exports to the US market have increased almost nine percentage points. Reason of this may be that US domestic machinery production only meets a limited share of local demand and therefore, American plastics and rubber processors have continued to turn to Italian and other manufacturers to acquire advanced technology.

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...e continued to increase at a steady pace but those to India rises more, with more than tripling in the past ten years. The growing incentives provided by the Make in India program have generated a strong acceleration of demand by local manufacturers, who require increasingly high quality technological systems.

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Two other important countries in the group of top ten destination markets have produced disappointing results for Italian manufacturers. Sales to Turkey have plunged by one third, breaking a five-year robust growth trend, and those to Brazil also performed worse (-45%).

Technology imports surge

With respect to the weakness in sales abroad, imports of technology recorded a surge of nearly twenty-four percentage points over 2024, confirming robust domestic demand.

This is clearly due partially to the effects of the incentives implemented by the Industry 4.0 and 5.0 Plans, in spite of difficulties in accessing them and delays in the enactment of the various associated implementation decrees. These issues are also critical in this first quarter of 2026 in the implementation of measures regarding the new "hyper-amortization" of investments in capital equipment through September 2028.


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