

Italian plastics and rubber machinery: export decline and rising tensions

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The Italian industry of machinery, equipment and moulds for plastics and rubber processing ended 2025 with a clear deterioration in results compared to the previous year. According to estimates by the Amaplast Study Center, a trade association affiliated with Confindustria that brings together over 170 manufacturers, production fell by around five percentage points, reaching a value of 4.4 billion euros. This marks a pronounced slowdown after the limited downturn recorded in 2024. For comparison,

direct competitors in Germany already experienced a sharp drop in orders, sales and exports in 2024. Exports of Italian technology, which account for three quarters of sector production, decreased in 2025 by 5% to just over 3.4 billion euros. At the same time, imports rose strongly, indicating that the domestic market remains highly absorptive, supported by instruments under the Industry 4.0 and 5.0 plans despite implementation issues.

Trade balance under pressure and the impact of investment schemes

With falling exports and a strong increase in foreign purchases, the trade balance of the sector has deteriorated significantly. After a record surplus of 2.65 billion euros in 2024, the figure declined to 2.24 billion euros in 2025.

Compared to the weakening of foreign sales, imports of technology into Italy increased by nearly 24% over 2024, confirming robust domestic demand. This is partly linked to investment incentives under the Industry 4.0 and 5.0 plans. At the same time, the industry reports difficulties in accessing these instruments and delays in the adoption of implementing measures. These problems are also visible in the first quarter of 2026, particularly in the roll-out of new hyper-amortisation mechanisms for investments in capital equipment scheduled through September 2028.

International factors: tariffs, exchange rate and energy crisis

The year 2025 on international markets was marked by growing uncertainty. One of the main factors was the tariffs introduced by the Donald Trump administration. Beyond the reciprocal component, they raise duties on steel and aluminium components in specific groups of machinery, parts and moulds for plastics and rubber.

The situation was further complicated by the progressive depreciation of the dollar against the euro, which reduced the competitiveness of European suppliers outside the euro area. Another shock was the outbreak of armed conflict in the Middle East, which triggered an energy crisis. This led to higher costs of natural gas, crude oil and polymer raw materials, as well as uncertainty

regarding their availability. Already in 2025 this had a negative impact on the European plastics and rubber processing industry.

Italian machinery manufacturers see these developments as a serious threat to investment propensity both in the domestic market and in key export markets in Europe. An additional source of challenges is the implementation of the new European Packaging and Packaging Waste Regulation (PPWR), which will significantly affect technology users and their investment decisions.

Export geography: Europe maintains its dominant role

The geographical structure of Italian exports of machinery, equipment and moulds for plastics and rubber in 2025 remained relatively stable, although shifts between individual regions are visible. The European Union continues to be the most important export destination, with a share above half of total exports.

Region	2024 (% of exports)	2025 (% of exports)
Europe (EU)	52.2 (40.9)	52.3 (43.0)
Asia/Oceania	17.2	19.0
North America/USMCA	17.1	17.1
Africa	6.6	6.2
Central and South America	6.9	5.4

The share of Europe as a whole remains essentially unchanged, while the importance of Asian and Oceania markets is increasing at the expense of Latin America and some African countries. The USMCA region, with the United States in the lead, maintains a stable share in the export structure.

Key destination markets: mixed performance in the top ten

Within the ten most important export markets, both declines and notable increases in sales were recorded. Sales to Germany, traditionally Italy's main trading partner, fell for the second consecutive year. According to estimates by German trade associations, in 2025 polymer production in Germany decreased by 4% in volume terms, production of plastic products by 2%, rubber products by 6%, and revenues of machinery manufacturers by 5%. The weakness of the German industrial sector directly translated into lower orders for Italian equipment.

Exports to processors in France, another major EU market, also fell. However, the negative trends in Germany and France were partly offset by higher sales to Spain, Poland and Romania.

Country	2024 (thousand euros)	2024 share (%)	Country	2025 (thousand euros)	2025 share (%)	Change 25/24 (%)
Germany	395,498	11.0	Germany	380,918	11.2	-3.7
United States	350,078	9.7	United States	380,575	11.2	8.7
China	186,721	5.2	China	200,999	5.9	7.6
France	205,602	5.7	France	181,629	5.3	-11.7
Spain	148,753	4.1	Spain	164,915	4.8	10.9

Mexico	226,698	6.3	Mexico	155,210	4.5	-31.5
Poland	134,368	3.7	Poland	151,166	4.4	12.5
India	108,081	3.0	India	150,841	4.4	39.6
Romania	89,902	2.5	Romania	106,564	3.1	18.5
United Kingdom	103,637	2.9	United Kingdom	95,645	2.8	-7.7
Total "top 10"	1,949,338	54.1	Total "top 10"	1,968,462	57.6	1.0
Rest of the world	1,647,079	45.9	Rest of the world	1,440,107	42.4	-12.6
World	3,596,417	100.0	World	3,408,569	100.0	-5.2

United States and Asia: growth despite trade tensions

By the end of December 2025, fears of a sharp collapse in exports to the United States, linked to the new tariffs, had not materialised. On the contrary, sales of Italian machinery to the US market increased by almost 9%. Domestic machinery production in the United States covers only a limited share of local demand, so plastics and rubber processors continue to turn to Italian and other foreign suppliers to acquire advanced production systems.

Sales to China also continued to grow, while exports to India expanded even more strongly. Over the past decade, exports of Italian machinery to India have more than tripled. The Make in India programme, with its expanding range of investment incentives, is generating a clear acceleration in demand from local manufacturers, who require increasingly advanced technologies. This market is described as having significant, largely untapped potential. The recently signed free trade agreement should further facilitate its development.

At the same time, disappointing results were recorded in two important countries that recently rejoined the top ten export destinations. Sales to Turkey fell by one third, breaking a five-year period of strong growth. The decline in Brazil was even steeper at 45%, although this is interpreted as a return to average levels seen in previous years after an exceptionally high peak in 2024. The industry looks forward to the entry into force of the EU–Mercosur trade agreement, which could bring new dynamism to trade with Brazil and, more broadly, with South America.

Product structure of exports: weakness in major segments

Analysis by product group shows weak or declining sales in most of the segments with the largest share of total exports. This applies primarily to extruders, where export value fell from nearly 400 to 350 million euros, blow moulding machines, from 212 to 198 million euros, flexographic printing machines, from 181 to 164 million euros, and moulds, from 752 to 721 million euros.

Against this background, the injection moulding machine segment stands out as the only one to buck the downward trend. In 2025, exports of injection moulding machines increased from 194 to 199 million euros. This indicates relatively stable demand for injection moulding technologies despite the deterioration in the overall investment climate.

Amaplast member performance and outlook for the coming months

Companies affiliated with Amaplast ended 2025 with a revenue decline of around five percentage points. At the same time, they managed to maintain employment, which increased marginally by 0.5%. Within this group, 54% of enterprises closed the year with lower sales, confirming that the downturn is widespread but unevenly distributed.

The industry regards forecasting for the coming months as particularly difficult. Market conditions are shaped by numerous factors with uncertain trajectories, from geopolitical and trade tensions to exchange rate movements and the adaptation of industry to new EU regulations. Many traditional export markets, previously perceived as stable and predictable, are becoming more difficult to access in terms of costs and regulatory barriers.

Plast 2026 as a platform for industry dialogue

In this challenging economic environment, one of the key forums for information exchange and networking for international operators in the plastics and rubber sector will be the Plast 2026 trade fair in Milan, scheduled for 9–12 June. The event is organised by Promaplast, the service company of Amaplast.

Preparations for the exhibition are at an advanced stage. Compared to the previous edition, more than 160 new exhibitors have already registered, 30% of which are foreign companies. In parallel, the organisation of associated events and the reception of hundreds of selected foreign buyers is underway, in cooperation with the ICE Agency and leading foreign manufacturers' associations.



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