



Plastic prices



Industry Panorama



B2B exchange



Radioplastica



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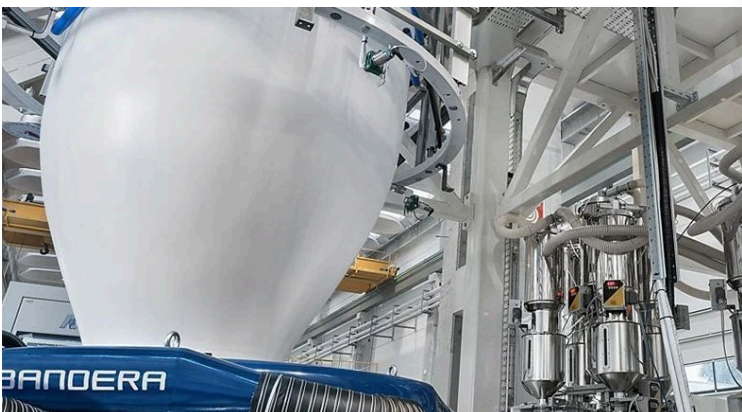


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Amaplast: exports are weakening, Poland is an important destination

AUTHOR: WF / MARCH 30, 2026 / HEADLINE , MACHINES AND EQUIPMENT , ORGANIZATIONS , NEWS / TAGS: AMAPLAST , ITALY

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The Italian sector of machinery, equipment, and molds for plastics and rubber processing ended 2025 with a significant slowdown, which, however—significantly—did not turn into a deep crisis. According to Amaplast data, production value reached approximately €4.4 billion, a decline of nearly 5% year-on-year. At the same time, exports, which account for approximately 75% of total production, declined by a similar amount, reaching just over €3.4 billion. It is worth noting that Italian manufacturers fared relatively well compared to their German competitors, which had already entered a phase of deeper decline,

The Moretto 2026 route will also include Poland

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affecting both orders, sales, and exports.

Of particular note, however, is the strong growth in technology imports to Italy, which increased by a staggering 24%. This is a clear sign of sustained investment demand in the domestic market, fueled in part by support mechanisms under the Industry 4.0 and 5.0 programs. Although access to these instruments remains difficult and legislative processes have been delayed, their impact on the modernization of the machinery fleet is clear. As a result, the sector's trade surplus fell from a record €2.65 billion in 2024 to €2.24 billion a year later.

The international environment in 2025 was exceptionally challenging. The introduction of tariffs by the United States, including those on steel and aluminum used in machinery production, worsened competitive conditions. Furthermore, the weakening dollar against the euro and geopolitical tensions, including the conflict in the Middle East and the associated rise in energy prices, translated into higher operating costs and greater investment uncertainty. In Europe, the decline in activity in Germany – Italy's key trading partner – proved particularly acute, with polymer production falling by 4% in 2025, and manufacturer revenues by 5%.

In this context, the importance of alternative markets is growing. Poland is becoming increasingly prominent among them, with – alongside Spain and Romania – a growing import of Italian processing technologies. For Polish processors, this confirms continued investment activity and the need for further automation and

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PZPTS: EuPC signal confirms market problems

TAGS: EUPC , PZPTS

EUPC: Rising energy prices destabilize the market

TAGS: ENERGY PRICES , EUPC

The EUPC obviously supports the changes to the PPWR regulations.

TAGS: EUPC , PPWR

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improved energy efficiency. This is particularly important given the implementation of EU environmental regulations, including the PPWR regulation, which requires process modernization and the implementation of more advanced processing technologies.

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At the same time, Italian manufacturers are successfully expanding their sales outside Europe. Exports to the United States increased by almost 9%, driven by a shortage of domestic production capacity and high demand for advanced technological solutions. Even greater potential is visible in India, where sales of Italian machinery have more than tripled in a decade, supported by the "Make in India" program. Steady growth is also maintained in China. Conversely, declines in Turkey and Brazil demonstrate the sector's continued dependence on local economic cycles.

Analysis of individual segments indicates that most machine categories experienced declines – particularly extruders, blow molding machines, and molds. The exception is injection molding machines, where sales increased, which can be attributed to relatively stable demand in the packaging and technical industries.

Despite the challenging market environment, Italian companies maintained employment, recording a slight increase of 0.5%. This signals that the industry maintains its solid foundations and ability to adapt to changing conditions. For Polish processors, this means continued access to modern, competitive technologies, which will be crucial in the coming years of the

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