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PRESS RELEASE

MOMENTARY SETBACK **for Italian plastics and rubber machinery manufacturers**

The 2024 full-year forecast developed by the MECS Study Centre of the trade association Amaplast indicates a drop of approximately nine percentage points in Italian production of plastics and rubber processing machinery to an estimated value of 4.35 billion euros. These figures reflect those expected for exports – the historical engine for the industry, which have exhibited a downward trend over the course of the year, although at a lower rate than other industrial sectors and other international competitors – which are expected to come in at 3.25 billion euros.

Imports, on the other hand, appear set to close the year with a bigger drop, on the order of -15%, feeling the effect of truly weak domestic demand. Of course, the post-pandemic recovery, which grew progressively in the three years 2021-2023, partly thanks to tax incentives, was never expected to continue indefinitely. Additionally, the protracted process of determining how to implement the measures provided in the Transition 5.0 plan has led to a pause in investments by Italian customers. Slowdowns in the automotive industry are also no small source of concern for businesses, especially because they are having a heavy impact on various European markets: Germany – Italy's long-term trading partner – first and foremost. International economic and geopolitical uncertainties are felt not only in nearby markets but also in others that are farther afield but still of prime importance to Italian plastics and rubber processing systems manufacturers.

ISTAT analyses of export flows for the period January-September 2024 show that Europe, while again representing the prime sales area for Italian-made products in the sector, has lost five percentage points in total value, a result that mirrors the trend in the EU, burdened by setbacks in important markets such as Spain and Poland (whereas, oddly, Italian sales to German converters have remained steady overall). The drop is even bigger in sales to the CIS, which have been halved mainly due to a collapse in sales to Russia. With the continuing embargo on sales of processing equipment in this market, Chinese competitors are commandeering a greater share of this market. On the other hand, exports have increased to various non-EU destinations, most notably to Turkey and the United Kingdom.

The average trend in exports to the Americas has shown little dynamism: in the north, sales to Mexico continue to go well while those to the United States are slowing down; Brazil still leads in the south but not strongly enough to counterbalance a drop in sales to historical partners such as Argentina, Peru, and Chile. To confirm the interest in the Mexican market, which also represents a bridge to other markets in the area, a new trade promotion unit, the Oficina Italiana de Promoción México, which will provide support to businesses in their trade activities, was recently instituted in collaboration with the machine tool association Ucim.



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The Asian area shows a clearly positive trend, especially the Far East, characterized by the noteworthy acceleration in sales to China (although the value is well below than the average reached by Germany), in spite of the local economic difficulties, as well as to India, Thailand, and Indonesia, just to name the most notable markets.

Sales are also accelerating in the Middle East boosted by strong demand from the Emirates and Israel (although Saudi Arabia has tended to apply the brakes).

As regards Africa, there is a considerable discrepancy between the two main geographical areas: a strong increase in flows to the sub-Saharan region (sales have more than doubled to South Africa and there are peaks in Cameroon, Angola, and Tanzania), contrasting with the poor performance of the Mediterranean countries, with the only positive result coming from Morocco: along with Algeria (which, however, has other problems), it is the only country that did not experience the upheavals of the Arab Spring.

“As regards 2025, it is not easy to make predictions,” stated Massimo Margaglione, President of Amaplast. “The ability of Italian manufacturers of technology for plastics and rubber processing to adapt to changing markets and propose technologically advanced and flexible solutions has to be balanced against the growing complexity of global scenarios. As things stand now, we can rule out a modest rebound, with a return to positive growth in the principal indicators for the industry on the order of one or two percentage points. The hope is for a more robust recovery in the domestic market, thanks to the effective introduction of the provisions in Transition 5.0, with the adoption of all the measures provided by European directives for sustainability and energy savings in production processes. However, we can not delineate a more precise outlook until after the first few months of the year have passed.”

Sustainability and energy savings will represent the core of the second edition of the exhibition-convention GreenPlast, organized by the Amaplast services company (Promaplast srl) for 27–30 May 2025 at the Fiera Milano fairgrounds in Rho-Pero. Complementing the exhibition section – with companies representing the full breadth of the plastics and rubber industry, from materials to machines, from processes to services – the conferences coordinated by AMI-Applied Market Information will address the key aspects such as the management of plastic waste, mechanical and chemical recycling, energy efficiency of machinery and processes, bioplastics, and much more.

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ASSOCIAZIONE NAZIONALE COSTRUTTORI DI MACCHINE
E STAMPI PER MATERIE PLASTICHE E GOMMA

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