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## PRESS RELEASE

### **POSITIVE 2021 BALANCE SHEET AND ENCOURAGING OUTLOOK FOR 2022, ALTHOUGH NOT WITHOUT SOME UNCERTAINTY** for Italian manufacturers of plastics and rubber processing machinery

With outcomes in some cases exceeding the forecast year-end results, the Italian industry of plastics and rubber processing machinery, equipment, and moulds closed the year 2021 with **double-digit growth** in production (+14%, with value exceeding pre-pandemic level) and equally encouraging results in foreign trade.

According to data from the MECS-AMAPLAST Statistical Studies Centre (the national trade association in Confindustria) combined with ISTAT data, the **strongly positive final balance** was driven in particular by excellent performance in the domestic market, close to +30% over 2020.

The share of exports is in line with previous years and close to 70% of production. Foreign sales also recorded a significant rebound (+9%) while not making it past the peak of 3 billion euros, which was abundantly exceeded in the three years preceding the crisis.

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Italian market of machinery, equipment and moulds for plastics and rubber  
(million euros)

	2020	2021	Δ% 2021/2020
production	3,900	4,450	14.1
export	2,730	2,980	9.2
import	770	1,050	36.4
domestic market	1,940	2,520	29.9
trade balance	+1,960	+1,930	-1.5

The main destination region is **Europe**, albeit with a slight decrease with respect to 2020. On the other hand, Italian companies in the sector benefited from transatlantic sales, a significant portion in **North America**, where the strongly growing U.S. economy expressed healthy demand, albeit with some contradictions. In parallel, strong increases in supply to priority markets such as China and India have strengthened the importance of the **Asian continent**.

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Destination areas of the Italian plastics and rubber machinery,  
equipment and moulds exports (%)

	2020	2021
Europe (UE)	58.6 (45.3)	57.4 (44.8)
North America/USMCA	14.5	16.8
Asia/Oceania	16.5	15.8
Africa	5.5	5.1
Central/South America	4.9	4.9



2.

Top ten destination countries of the Italian plastics and rubber machinery, equipment and moulds exports (000 euros – 2021 ranking)

Countries	2020	% out of total	Countries	2021	% out of total	Δ % 21/20
Germany	343,723	12.6	Germany	376,484	12.6	9.5
United States	269,788	9.9	United States	359,032	12.1	33.1
China	143,938	5.3	China	160,565	5.4	11.5
France	151,250	5.5	France	157,107	5.3	3.9
Poland	153,010	5.6	Poland	134,876	4.5	-11.8
United Kingdom	97,294	3.6	United Kingdom	105,088	3.5	8.0
Mexico	97,708	3.6	Mexico	104,580	3.5	7.0
Spain	138,577	5.1	Spain	99,735	3.3	-28.0
Turkey	77,410	2.8	Turkey	90,038	3.0	16.3
India	65,596	2.4	India	86,899	2.9	32.5
total "top 10"	1,538,294	56.4	total "top 10"	1,674,404	56.1	8.8
other countries	1,194,735	43.6	other countries	1,305,140	43.9	9.2
world	2,733,029	100.0	world	2,979,544	100.0	9.0

As for **Russia** - a key market that has shown notable oscillations over the years - already in 2021, as if anticipating recent, dramatic developments, Italian machinery exports witnessed a decrease of 16%, barely exceeding 80 million euros. (Exports to Ukraine, historically more limited, did not exceed 7.5 million euros, -39% with respect to 2020)

In terms of product categories, after losses registered for various types of machinery in 2020, recovery was recorded in 2021 across most categories, **from core machinery to auxiliaries and moulds**. For example, foreign sales grew by 29% for injection and blow-moulding machines, by 18% for plants for mono- and multifilament, and by 6% for moulds (representing nearly a fourth of the total).

**AMAPLAST member companies outperformed** other firms in the sector, with an average increase in revenues of sixteen points over 2020. For approximately half of the companies that closed the year boasting positive growth, these increases were equal to or greater than +20%. And given this positive performance, it is not surprising that the number of employees of member companies also increased (+8% over 2020, with one third of the sample showing even more impressive hiring figures).

It is quite difficult to venture **forecasts for the coming months**: there are many factors that may influence the global economic context that are difficult to quantify and may accumulate or overlap over time. Shortages in raw materials and components and the resulting increase in prices that companies have been lamenting for over a year could get even worse due to the recent closure of the port of Shanghai as part of China's drastic measures to combat Covid. This will probably affect logistics and distribution chains. Essential materials for various manufacturing processes are produced in areas affected by the Russian-Ukraine conflict, which has also caused energy prices to skyrocket to **levels that are unsustainable** for many production chains.



3.

Companies thus find themselves operating in an **exceedingly complicated and also paradoxical situation**: in spite of the above issues, orders continue to accumulate and it may become complicated for many companies to fulfil them.

Indeed, the latest survey by AMAPLAST among its members regarding the first quarter of 2022 shows that demand for plastics and rubber processing machinery, equipment, and moulds continues to grow, particularly in foreign markets (+28% with respect to January-March 2021). **Outlooks for the second quarter** are also characterized by optimism, at least as strictly regards incoming orders, expected to grow by another 6-7%.

This trend will naturally be conditioned to some extent with the issues mentioned above. Not surprisingly, AMAPLAST has urged policymakers to draw up another **Industrial New Deal** to protect European manufacturing with immediate measures and also long-term programmes regarding raw materials, energy, and logistics.

And energy efficiency is one of the key themes at the exhibition-convention **GREENPLAST 2022**, taking place at Fiera Milano's Rho-Però fairgrounds on 3-6 May, organized by Promaplast srl (AMAPLAST service company). It will be an important moment for discussions and updates for the plastics and rubber industry, with a particular focus on **environmental sustainability, recycling, and the circular economy**.

Producers of raw materials, products, and production machinery, service providers, opinion leaders, and researchers will propose their ideas and innovative solutions both at their stands and in the rich convention programme during the four-day event in Milan, which will also feature the third edition of **PACKAGING SPEAKS GREEN**, an international forum dedicated to the development of a culture of sustainability in packaging.

**GREENPLAST** will be held in parallel with Ipack-Ima, international exhibition for the packaging industry (together with the specialized Pharmintech), Print4All (dedicated to commercial and industrial printing), Intralogistica Italia (systems for industrial materials handling, warehouse management, materials storage, and picking) and, for the first time in Milan. These events embody the logic of an integrated supply chain and are an important component of "The Innovation Alliance".

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

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