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PRESS RELEASE

MADE IN ITALY ON DISPLAY AT K

In keeping with tradition, Italy will once again be out in force at the coming edition of the triennial K trade fair in Düsseldorf from 8 to 15 October 2025.

Nearly **400 Italian companies in the plastics and rubber supply chain** have registered for the world's leading event in the sector. After the German hosts, Italy will again have the strongest presence among European nations and third overall, behind China.

More than **300 Italian businesses in the machinery, equipment, auxiliaries, and moulds sector** will be exhibiting their latest solutions, covering all plastics and rubber processing technologies with an increasingly keen eye on energy savings and generally on sustainability, digitalization, customization, and process efficiency. More than half of these companies are members of the trade association Amaplast, which will participate in the fair at its institutional stand (Hall 16, n. A56) to provide visitors with information on the sector, hand out the **MacPlas** magazine, and promote the 20th edition of **PLAST (Milan, 9-12 June 2026)**, whose organizational machinery will kick into high gear immediately following the German event. More than 450 exhibitors are already registered for the specialized Milan fair, outstripping the figures for the same period three years ago and destined to grow further, boosted partly by a 10% discount on participation fees for those signing up before 31 October. Former and potential PLAST exhibitors are invited to a **cocktail party** hosted by the organizer, Promaplast, on 12 October at the Messe Düsseldorf fairgrounds.

The current geopolitical situation is certainly complicated and there are many factors inhibiting **investments by manufacturers and process technologies**, both in the Italian market and in the principal export markets. Historically first and foremost among the latter is Germany.

In 2024, Italian manufacturers sold plastics and rubber processing machinery to K host worth a total of **415 million euros**, representing a 2-point drop with respect to 2023. Sales for the first half of 2025 amount to 183 million, evidencing persistent weakness.

A significant share of these sales consists of auxiliaries, components, and moulds not destined for end-users but to be integrated into production lines built by German manufacturers. The strong drop in demand the Germans have witnessed over the past three years has inevitably affected their Italian partners. Some signs of a **turnaround** have emerged in recent months but the latest challenges induced by the tariff policies adopted by the U.S. administration are the source of considerable concern for the industry. For both German and Italy, **the United States represent the second-largest export market** and the reciprocal 15% tariffs, compounded by new 50% duties on the steel and aluminium components for machinery, equipment, and moulds for plastics and rubber processing, represent a serious threat to European suppliers and are also a destabilizing factor for

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ITALIAN PLASTICS AND RUBBER PROCESSING MACHINERY AND MOULDS MANUFACTURERS' ASSOCIATION

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American processors, who cannot rely wholly on local manufacturers to meet their technology demand.

In 2024, Italian exports for the sector to the United States amounted to some 350 million euros, slightly lower than in 2023. In the first six months of 2025 the variation moved into positive territory, but we will have to wait to see what effects the new duties will have in the next few months.

This performance must be viewed within the broader **context of a slowdown in Italian exports** of plastics and rubber processing machinery, which overall – according to ISTAT data – fell by 8% compared to January-June 2024.

Sales have fallen, to greater or lesser degrees, across almost all geographical areas, with the sole exception of Asia, thanks to excellent performance in the Far East, driven principally by **Chinese (+54%) and Indian (+9%) demand**. These two destinations have returned encouraging results in recent months, and it is understandable that Italian manufacturers are focusing their commercial strategies on markets that are less affected by the current economic turbulence.

While, as mentioned above, exports to the United States remain fairly strong, those to Mexico (another key market in the region) have witnessed a sharp downturn (-42%). Italy's intra-European exports have contracted by ten points, weighed down by the -13% to Germany and negative results for other major markets such as France, Spain, and Turkey. The Middle East (-23%) and Sub-Saharan Africa (-48%) have fared particularly badly and declines are recorded also in Central and South America (-9%) and North Africa (-7%).

Imports, on the other hand, continue to show strong growth, at an average of +11%.

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