



Assocomaplast

ITALIAN PLASTICS AND RUBBER PROCESSING MACHINERY
AND MOULDS MANUFACTURERS' ASSOCIATION

Associated with:
CONFINDUSTRIA, FEDERMACCHINE, EUROMAP



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THE ITALIAN INDUSTRY: 2003-2005 SYNTHESIS

The 2005 final balance, worked out by ASSOCOMAPLAST, shows negative results for the five considered indexes, referred to the Italian market for the plastics and rubber processing machines and equipment.

It must be remarked that, among the machinery manufacturers companies, members of the trade association, really not few ones – on the contrary and despite the extreme fluidity and difficulties of the market, domestic as the foreign ones – have recorded a turnover upturn, even significant in some cases, which means a 2% decrease, on average, for the whole membership (the workforce, likewise, suffered a cut of 1.3%). The better commercial performance of those companies, besides reflecting a good collection of orders in Italy and mainly abroad, it seems to be the outcome of a focused strategy aimed at offering the best quality/price ratio with respect to the competitors (an attitude which has always been a distinctive factor of the Italian sectoral industry).

In synthesis, matching the results of 2005 over 2003, it can be seen that trade balance shows the best index, having increased on average in the three-year period by 2.6%; slightly up the production appears as well – even if by a mere 0.5% – and the Italian machinery and moulds export too (+0.8%). In connection with the definitely weak demand of new machines coming from the Italian plastics and rubber processors, the import stream decreased 4 percentage points on average along 2003-2005. Consequently, the domestic market trend has been hit, showing almost an average drop of 1%.

2003-2005 evolution for the Italian market for plastics and rubber processing machinery (million euros)

	2003	2004	2005
production	3,750	3,870	3,700
export	2,192	2,274	2,145
import	597	634	552
domestic market	2,155	2,230	2,107
trade balance	1,595	1,640	1,593

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Italian import-export of plastics and rubber machinery and equipment (000 euro)

	IMPORT			EXPORT		
	2003	2004	2005	2003	2004	2005
calenders and laminators	646	56	476	56,207	42,602	43,021
flexographic printing machines	14,133	23,146	14,433	109,165	108,345	135,628
plants for mono and multifilaments	6,045	6,056	5,501	56,343	49,294	60,156
injection moulding machines	64,964	64,257	57,095	271,746	247,493	214,888
extruders	32,680	26,589	33,374	231,219	230,591	210,265
blow moulding machines	15,169	24,644	11,315	109,085	114,278	101,009
thermoforming machines	7,929	9,508	6,903	27,726	26,408	28,872
presses for tyres and inner tubes	10,065	4,031	4,548	18,751	20,434	18,740
presses	22,026	21,816	19,287	31,441	28,660	36,703
machinery for moulding or forming	22,013	8,386	11,506	77,862	73,351	90,763
machines for reactive resins	809	1,407	1,705	25,344	31,246	26,426
machines for foamed products	3,483	3,967	2,517	17,367	31,500	20,463
equipment for size reduction	4,134	3,189	2,441	25,796	17,988	28,428
mixers	990	2,056	829	12,420	13,148	14,688
cutting, splitting and peeling machines	1,471	2,918	6,199	5,922	5,757	4,842
other machines	40,405	51,135	45,088	222,309	270,326	306,119
parts and components	119,344	120,164	129,913	308,391	326,670	312,857
moulds	230,805	260,480	198,545	584,430	636,249	490,829
total	597,112	633,805	551,675	2,191,523	2,274,340	2,144,697

Top 10 destination markets for the Italian machines manufacturers (ranking and shares on the total)

	2003		2004		2005		▲ % 2005/2004	▲ % on the three years
	ranking	% out of total	ranking	% out of total	ranking	% out of total		
China	3°	7.4	5°	5.3	3°	6.8	21.5	-2.2
France	2°	7.5	2°	7.7	6°	5.6	-32.1	-13.1
Germany	1°	19.4	1°	18.8	1°	13.0	-35.0	-5.8
Mexico	9°	3.4	nc	2.3	9°	3.6	49.2	-6.7
Poland	10°	2.5	9°	3.2	10°	3.1	-10.5	31.7
United Kingdom	6°	4.4	7°	4.4	7°	4.0	-14.2	-9.3
Spain	4°	6.8	3°	6.2	5°	6.0	-9.2	-2.7
United States	5°	6.1	6°	5.2	2°	7.7	41.2	10.4
Switzerland	nc	1.8	10°	3.0	nc	2.4	-22.3	7.2
Turkey	8°	3.5	8°	4.1	8°	3.7	-14.0	14.1
CIS (Russia)	7°	4.2	4°	6.2	4°	6.2	-4.9	21.5
other countries	--	32.9	--	33.7	--	37.9	6.0	2.8
total export (000 euro)	2,191,523		2,274,342		2,144,695		-5.7	0.8

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