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THE ITALIAN PACKAGING SECTOR

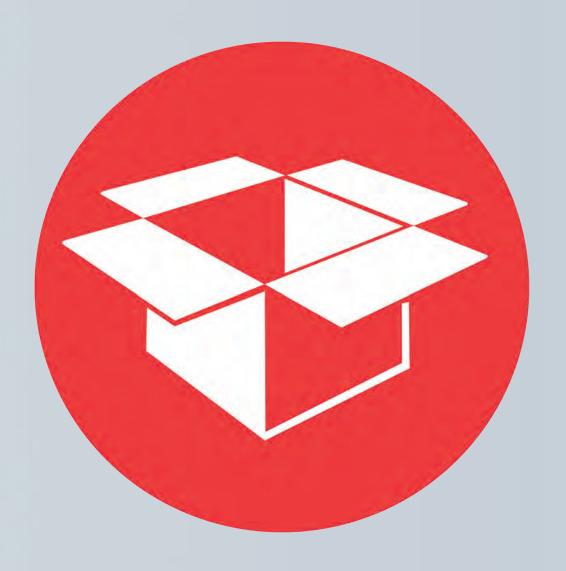
With a turnover of more than 6 billion euro, the Italian automatic packaging machinery sector is one of the most dynamic Italian industries.

It is one of the Italian sectors with the highest **export propensity (more than 80%)** and consists of some **200-250 industrial-sized companies**, along with around 300 production units with artisanal characteristics. It is a world-leading industry that competes with German manufacturers for the international leadership position. More than 50% of all automatic packaging machinery sold worldwide is Italian or German.

The Italian automatic packaging machinery industry's leadership position is based on four essential factors: a high level of technology and product quality; an extremely high level of customization and operating flexibility of machinery; rapid after-sales support in all world markets; and a high degree of competitiveness due to the combination of large integrated groups and highly specialized small and medium-sized enterprises that as a whole offer a full range of machinery for all types of products.

The companies are based prevalently in the regions of Emilia-Romagna (home to the highest concentration of sector companies anywhere in the world), Lombardy, Piedmont and Veneto, together accounting for more than 80% of the sector's companies. The manufacturing center is in the so-called "Packaging Valley" in the province of Bologna.

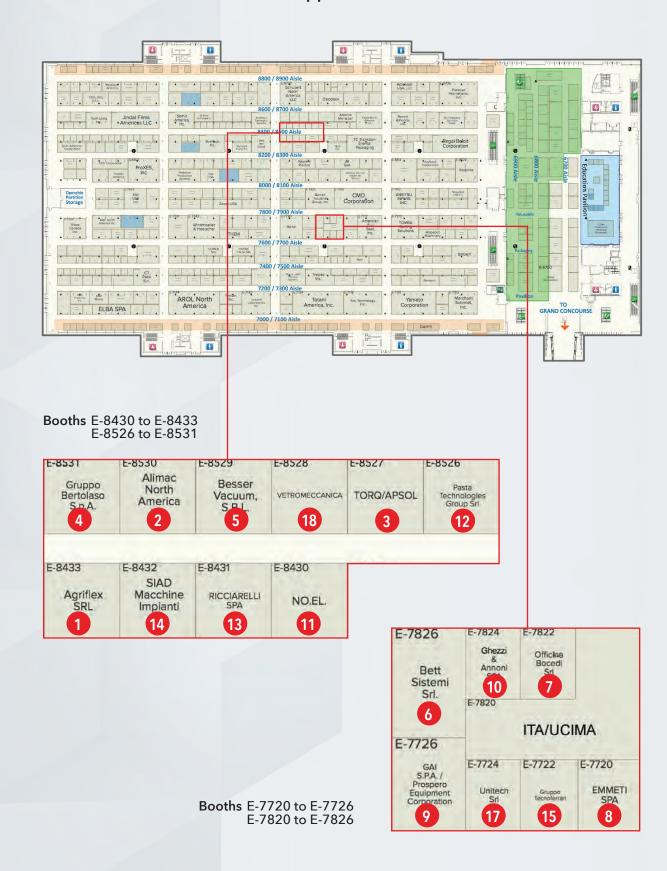
Most of the packaging machinery produced is absorbed by the food sector (which accounts for around 60% of the industry's turnover) and pharmaceutics, cosmetics and toiletries (just under 25%). The rest is used in various sectors, particularly tobacco, where the Italian machinery industry has a long tradition, chemicals/petrochemicals and tissues.



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Packaging Technologies

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The ITALIAN TRADE AGENCY is the Italian Government Agency promoting the internationalization of Italian companies abroad, in line with the strategies of the Ministry of Economic Development.

ITALIAN TRADE AGENCY

ITA works with Italian and foreign companies along with local authorities and businesses via its worldwide network linked to

Italian embassies and consulates. The ITA also facilitates the establishment and development of foreign companies in Italy.

The ITALIAN TRADE AGENCY - *Chicago Office* oversees, among many other programs, the *Machines Italia* project which supports 15 leading Italian machinery manufacturers' associations representing more than 10,000 Italian companies through numerous programs with North American companies, organizations, and academic institutions for multiple machinery sectors, including *packaging and food processing sectors*.

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UCIMA



UCIMA (Italian Packaging Machinery Manufacturers' Association) is the national trade association that represents and supports the Italian packing and packaging machinery manufacturers. It has more than 130 member companies from all over the country, including the industry leaders. UCIMA member companies cover the entire range of packaging machinery production, from the food, confectionery and tobacco industries through to pharmaceuticals, chemicals, petrochemicals, cosmetics and end-of-line technologies.

Italy is one of the world leaders in packaging machinery, with a world market share of 25,5%. In 2017 the sector's turnover totaled more than 7 billion euro. Exports account for around 80% of total turnover with a value of over 5 billion euro.

The largest market area is the European Union. In second place is Asia, next come North America, Central and South America and Extra UE-Europe.

As regards the most important countries of export, United States, France and China are the top export markets.

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