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## PRESS RELEASE

### **A YEAR OF CONSOLIDATION**

#### **for Italian manufacturers of plastics and rubber processing machinery**

Amaplast (Italian trade association, member of CONFINDUSTRIA, bringing together about 170 manufacturers of plastics and rubber processing machinery, equipment and moulds), through its Statistical Studies Center, has completed its year-end balance sheet for 2018, incorporating foreign trade data from ISTAT (Italian Institute of Statistics).

Italian market of machinery, equipment and moulds for plastics and rubber (million euros)			
	2017	2018	Δ% 2018/2017
production	4,670	4,700	0.6
exports	3,310	3,260	-1.5
imports	970	1,000	3.1
domestic market	2,330	2,440	4.7
trade balance	2,340	2,260	-3.4

After a record-setting 2017 - with double-digit growth in all indicators - the year-end results for 2018 continue the positive trend.

While at somewhat more modest levels, production has continued to show growth after the all-time record set the previous year, while exports - which have always been the powerhouse for the sector - show only a slight contraction.

Imports and the domestic market held their ground, the latter probably reaping the last benefits of the investment support measures implemented in the previous Stability Law. It was not by chance that many Italian manufacturers witnessed another increase in their order books in the second half of 2018.

At +3.6%, the increase in revenues for Amaplast member companies (the mainstay of the sector) is greater than the average for the entire sector.

“On the whole, we can say we are happy with the results from the previous year,” stated Amaplast President Alessandro Grassi. “We consolidated our potential and our global position as



2.

leader in the provision of advanced technology, now fully within an Industry 4.0 vision.”

Grassi continued, “2018 may turn out to be a transition year. Beyond the normal realm of economic cycles, which leads us to expect an inversion of trend in 2019 after eight years of positive growth, companies are beginning to show signs of concern regarding the effects of the new governmental budget policies and the general trend in the economy. This is in response both to the reworking of tax incentives and to international upheavals such as Brexit and the United States–China trade war.”

The latest year-end Amaplast member survey shows somewhat less optimism than in the previous survey - or perhaps a certain reluctance to go out on a limb, depending on how you look at it - regarding the trend in orders and revenues in the current half-year: fewer members expect an increase (or decrease) while the proportion of those foreseeing stability has increased.

As regards exports, a geographical analysis of destination markets shows stagnation in Europe, historically the main market for Italian manufacturers. The EU markets have lost a small amount of ground to the rest of Europe due to greater sales to various countries - however, this excludes Russia (an important destination), where sales have continued to slip.

In the Americas, the NAFTA countries have performed well, especially Mexico, while South America has lost ground, mainly due to a lacklustre trend in the two principal markets, Brazil and Argentina.

Sales to Asian countries have not been stellar. The Far East has been characterised by modest growth (although the remarkable growth in India was not sufficient to counterbalance the negative trend in China) while the Middle East has shown a sudden slump (all main markets have shrunk, Saudi Arabia and Iran first and foremost).

Africa has show positive overall performance, but given the great diversity, we must at least distinguish between Mediterranean Africa (with a significant increase in sales especially to Morocco) and the Sub-Saharan countries, which as a whole have contracted significantly, as is the case for South Africa.

Destination areas of the Italian plastics and rubber machinery, equipment and moulds exports (%)		
	2017	2018
Europe (UE)	60.7 (51,7)	60.1 (50,4)
North America/NAFTA	13.7	15.1
Asia/Oceania	15.1	14.5
Africa	4.9	5.4
Central/South America	5.6	4.9



3.

Top ten destination countries of the Italian plastics and rubber machinery, equipment and moulds exports (000 euro)						
countries	2017	% out of the total	countries	2018	% out of the total	Δ % 18/17
Germany	481,441	14.5	Germany	470,747	14.5	-2.2
United States	276,034	8.3	United States	293,792	9.0	6.4
France	159,624	4.8	France	163,558	5.0	2.5
Mexico	142,688	4.3	Mexico	159,250	4.9	11.6
Spain	148,125	4.5	Spain	153,707	4.7	3.8
Poland	158,893	4.8	Poland	152,847	4.7	-3.8
United Kingdom	119,370	3.6	United Kingdom	121,659	3.7	1.9
China	134,191	4.1	China	116,719	3.6	-13.0
Czech Rep.	126,717	3.8	Czech Rep.	108,228	3.3	-14.6
Turkey	89,497	2.7	Turkey	92,964	2.9	3.9
total "top 10"	1,836,580	55.5	total "top 10"	1,833,471	56.3	-0.2
other countries	1,472,743	44.5	other countries	1,424,059	43.7	-3.3
world	3,309,323	100.0	world	3,257,530	100.0	-1.6

As regards the composition of exports, core machinery fared better on the average (with the exclusion of plants for foamed products) while auxiliaries and moulds recorded a more negative trend.

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Amaplast has organised a number of initiatives for the coming months to promote the Italian plastics and rubber processing industry. As regards tradeshow, after the announcement of the dates for PLAST (Milan, 4–7 May 2021, again in conjunction with The Innovation Alliance), the association is preparing to assist its members in major exhibitions, coordinating the national collectives at:

- Plastico Brasil (Sao Paulo, March 25-29)
- Plastimagen (Mexico City, April 2-5). To provide further support for the Made in Italy in a market that has provided very good results for Italian manufacturers in recent years, Amaplast has organised a touring technology seminar (Monterrey, Puebla, Mexico City) on applying the "Industry 4.0" paradigm in an injection-moulding plant
- Chinaplas (Guangzhou, May 21-24).

Furthermore, Amaplast will be present with an information stand at: PlastPrintPack in Nigeria



4.

(Lagos, March 26-28) and in Etiopia (Addis Abeba, May 9-11), Plastpol (Kielce, May 28-31).

In parallel, the association and companies have already begun to focus on the main international event for the sector, K in Düsseldorf (October 16-23), which will witness the presence of nearly 400 Italian exhibitors, including over 300 machinery and equipment manufacturers. The Italian presence will be second only to that of the host country.

**For information and interviews**

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