



UCIMA

Unione Costruttori Italiani Macchine Automatiche
per il Confezionamento e l'Imballaggio



PRESS RELEASE

Modena, 22 June 2016

Packaging machinery: 2015 turnover close to 6.2 billion euros.

The sector's turnover totalled 6,197 million euros, slightly down (-0.4%) on 2014.

80.7% of turnover was generated by exports, mainly to the European Union, Asia and non-EU Europe. The top five target markets are the United States, France, Germany, China and Turkey.

Technology for the beverage industry was the top client sector with 29.1% of the total, closely followed by food industry technology at 28.5%.

The Italian market grew by 2% to reach 1.2 billion euros.

The Italian packaging machinery industry is made up of **588 companies** employing **27,906 people** and generating a turnover of **6,197 million euros**, of which **80.7%** is earned in **international markets (5,003 million euros)** and **19.3% (1,194 million euros)** in the **domestic market**.

This is the picture that emerges from the fourth National Statistical Survey of the Italian packaging machinery manufacturing sector conducted by the Research Department of Ucima, the Italian national trade association.

In 2015 the industry maintained the previous year's turnover levels and confirmed its position as one of the most dynamic Italian sectors and the top capital goods industry in terms of total turnover and above all its contribution to total exports.

Results in international markets

In 2015, sales in international markets saw a slight fall in volumes (-0.9%), mainly due to the slowdowns in a number of important markets such as Brazil, China and Russia.

However, this trend was offset by strong performances in other markets and the final result remained above 5 billion euros.

The top geographical areas of destination for exports were: the European Union, which accounted for 35.6% of total turnover (1,667.8 million euros), Asia in second place with a

UFFICIO MARKETING & COMUNICAZIONE

GIAN PAOLO CRASTA comunicazione@ucima.it, +39 334 6649 534 - Tel. +39 059 512 146 Fax +39 059 512175

www.ucima.it - info@ucima.it

ufficio stampa e comunicazione a cura di

INTONOCOMUNICAZIONE
UFFICIO STAMPA & PUBBLICHE RELAZIONI

value of 1,071.9 million euros (22.7% of the total), and non-EU Europe in third place with 549.2 million euros (11.6%). Next come North America (509 million euros; 10.8%), Africa and Oceania (454.5 million euros; 9.6%), and Central and South America (452.1 million euros; 9.6%).

The United States, France and Germany remain the top three individual countries, followed by China, Turkey, UK, Spain, Switzerland, Saudi Arabia and Brazil.

In export markets, the best performances were achieved by the *Others* client sector, which consists mainly of technologies for the tobacco and tissue industries (+13.5%), followed by the cosmetics industry (+10.2%) and the pharmaceutical industry (+8.4%).

The leading client sector in absolute terms is *Beverages* with sales of 1,525 million euros, followed by *Food* with 1,334 million euros and *Others* with 913 million euros. Next come sales to the pharmaceuticals industry (851 million euros), cosmetics (227 million euros) and the chemicals and home care industry (153 million euros).

The domestic market

Domestic Italian sales continue to show a positive trend, amounting to 1,194 million euros in 2015, 1.9% up on 2014.

In the domestic market, the highest growth was in sales to the pharmaceutical industry (+23.3%), to the *Others* sector (+7.6%), and to the food industry, which however grew by a modest 0.4%.

In absolute terms, food remained the leading sector with a turnover of 434 million euros, followed by beverages with 276 million euros and pharmaceuticals with 196 million euros. The fourth largest market was *Others* (157 million euros). At the bottom of the rankings were sales to the cosmetics industry (73 million euros) and to the *Chemicals & Home Care* industries (57 million euros).

Client sectors

Overall, sales to the *beverages* sector made up the biggest volumes at 1,801 million euros, pushing sales to the *food* sector into second place at 1,768 million euros. The *Others* sector was in third place with 1,069 million euros.

These were followed by pharmaceuticals (1,047 million euros), cosmetics (300 million euros) and *Chemicals & Home Care* (210 million euros).

Company size and geographical location

UFFICIO MARKETING & COMUNICAZIONE

GIAN PAOLO CRASTA comunicazione@ucima.it, +39 334 6649 534 - Tel. +39 059 512 146 Fax +39 059 512175
www.ucima.it – info@ucima.it

The analysis of the sector by turnover size class reveals a clear preponderance of small companies. Companies **with turnovers below 5 million euros** accounted for **66% of the total**, but generated **just 9.9% to the sector's total turnover**.

Companies with turnovers **above 25 million euros made up just 7.8%** of the total but generated the **largest share (65.7%) of total turnover**.

Most companies are located in the **Emilia Romagna region** (36.2%), accounting for 62.8% of total turnover. Next come **Lombardy** (28.1% of companies and 16.8% of turnover), **Veneto** (12.6% of companies and 9.7% of turnover) and **Piedmont** (10.5% of companies and 5.6% of turnover).

Company size appears to have a major impact on export propensity, with the **smallest companies** (up to 2.5 million euro) generating **more than half of their turnover (55.6%) in the domestic Italian market**.

The percentage of domestic sales decreases steadily with company size, reaching **just 9.8% of turnover** for the **largest companies** (more than 50 million euros).

2016 forecasts

“The slowdown in a number of key markets for our technologies continued in the first three months of 2016,” said Ucima Chairman, **Enrico Aureli**. “These widespread downturns, only partly offset by strong performances in other countries, resulted in a 10% fall in our exports.”

“However, orders rose during the first four months of the year,” continued Aureli. “We are therefore confident that we will succeed in improving on the results achieved at the end of 2015.”

According to the Ucima Research Department's forecast of world demand for packaging machinery (Cube), the world market will grow at an estimated 5.4% annually over the next three years to a total value of 42.7 billion euros.

UFFICIO MARKETING & COMUNICAZIONE

GIAN PAOLO CRASTA comunicazione@ucima.it, +39 334 6649 534 - Tel. +39 059 512 146 Fax +39 059 512175

www.ucima.it – info@ucima.it