Italy. Not everything that glistens in the Italian plastics industry is now gold. But the raw data do at least suggest that the land south of the Alps is again experiencing an upswing. Perhaps Plast 2012 in early May will provide an indication of how long the current high will last.

Upswing in the South

According to preliminary figures from Assocomaplast, an Italian industry association with some 170 member companies, Italian manufacturers of machinery, ancillary equipment and molds for plastics and rubber processing are gradually returning to their former strengths. Data released in mid-March for the year 2011 reveal hefty increases in production and sales – for both exports and imports (see **Table 1**). Production value rose by 11.1 %, compared with 2010, to a total volume of EUR 4.0 billion. While exports increased by 20.9 % to EUR 2.4 billion, imports grew by a comparatively modest 6.1 % to EUR 605 million.

Almost Half of Exports Go to the EU

In theory, therefore, the domestic Italian market is virtually unchanged in size (production plus imports minus exports = +0.9 %). The trade surplus (exports minus imports), however, rose by 26.7 % to EUR 1.8 billion. Although the dizzy heights of peak year 2007 have not yet been regained, the huge decline of 2009 is likely now all but forgotten. Of course, the Italian manufacturers are in good company, as most of the industrialized nations are sharing the fate of a dramatic crash followed by a glorious recovery within two years.

An Istat (Italian Statistics Office) analysis of the major markets shows that Europe – and especially the EU – remains the focus of Italian exports of machinery and tooling for plastics processing. These were distributed across the various regions as follows in 2011:

- Europe 58.8 % (EU 46.4 %)
- Asia and Oceania 19.2 %
- North America 9.1 %
- Central and South America 8.7 %
- Africa 4.2 %.

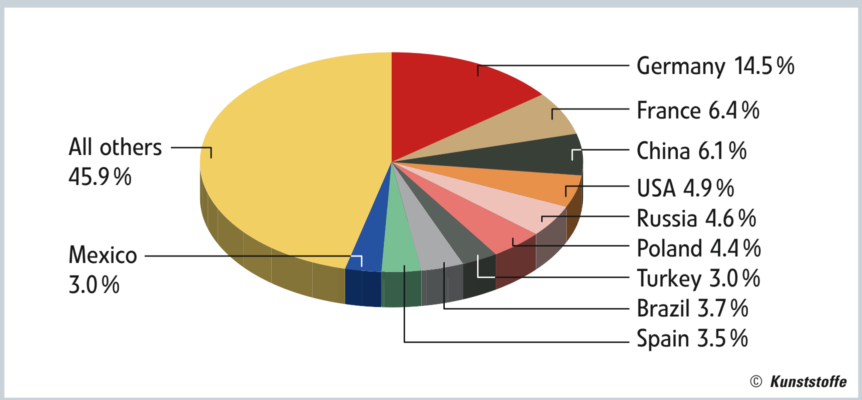

Fig. 1. By a substantial margin, Germany leads the 2011 list of the most important sales markets for Italian manufacturers of machines and tools for the plastics processing industry (figure: Assocomaplast)

A look at the individual markets reveals one seemingly incontrovertible constant: Germany is by far the most important target market for Italian machinery exports **(Fig. 1)**, with a share of 14.5 %, equivalent to a volume of EUR 351 million. It is followed by France, China and the United States. The highest growth rates posted by Italian companies from 2010 to 2011 were in Russia and Poland. The leader group also includes Brazil and Spain, two countries with declining sales figures. The top ten markets cover at least 54 %, or EUR 1.3 billion, of exports by Italian manufacturers.

A Particularly Close Relationship

Conversely, Germany leads the statistics for countries which exported plastics and rubber machinery to Italy. This, too, highlights the close ties between the two nations. Imports from the Federal Republic

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(without tooling) make up far more than a third of the total volume **(Fig. 2)**. Next in order come Italy's neighbors France, Switzerland, and Austria, with the United States in fifth position.

However, as a sales market for German manufacturers, Italy ranks well behind China, USA, India and Russia in the VDMA statistics for 2010. But even so, the land between South Tyrol and Sicily is an important purchaser of machines "Made in Germany": exports last year amounted to EUR 117 million. Just over a third of this was earned by manufacturers of injection molding machines, who also recorded the largest increase from 2010 to 2011, namely 44 %. By contrast, suppliers of extruders and blow molding machines suffered declines. Producers of thermoforming machines and presses managed to double their exports to Italy within one year **(Table 2)**.

	2007	2008	2009	2010	2011
Production	4,250	4,200	3,300	3,600	4,000
Export	2,753	2,451	1,833	2,010	2,430
Import	634	589	484	570	605
Domestic market	2,132	2,338	1,951	2,160	2,180
Trade balance	2,118	1,862	1,349	1,440	1,825
	(All data in EUR million)				

Table 1. Following the crisis of 2009, the Italian market for machinery and tools for plastics and rubber processing is clearly trending up again on a macroeconomic level (figure: Assocomaplast)

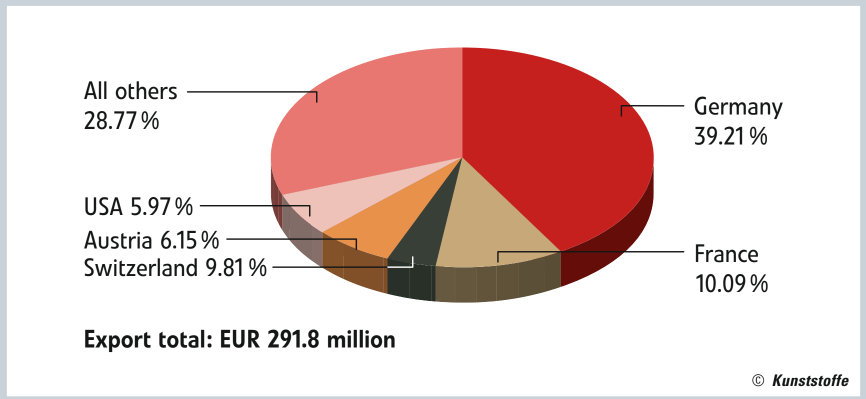

Fig. 2. Conversely, Germany also takes top position among the countries that export to Italy. The data relate to trade in plastics and rubber machinery in 2010 (figure: VDMA, foreign trade data from 48 reporting countries)

Holding their Own on the World Market

On the world market, Italian manufacturers of plastics machinery have defended their position. Although their share of world production (total volume: EUR 23 billion) shrank from 12.1 to 9.6 % according to the VDMA's 2010 annual statistics, they are safely in third place behind the Chinese (29.3 %) and Germany (21.0 %). In terms of world exports (total volume: EUR 14 billion), Italy (9.6 %) has dropped from second to fourth place – behind Germany (23.7 %), Japan (13.1 %) and China (10.6 %).

In the other two areas, the Italian plastics industry continues to be a major player as well. Of the 46.4 million metric tons of plastics estimated by PlasticsEurope to have been processed in Europe in 2010, Italy accounts for about 7 million tons. Only in Germany was demand with almost 12 million tons greater. Thus, the two countries together account for around 40 % of plastics consumption in Europe. At 57 million tons, European plastics production amounts to more than a fifth of the world's annual production of 265 million tons. In the ranks of the largest producers on the old continent, Italy (2 %) trails Germany (7 %), the Benelux region (3.5 %) and France (3 %).

	2007	2008	2009	2010	2011
Total, of which	185,757	144,382	95,714	114,387	117,447
Injection molding machines	44,144	32,790	14,433	26,296	37,796
Extruders	43,481	17,401	7,526	7,832	3,748
Blow-molding machines	12,047	9,372	3,513	6,384	3,946
Thermoforming machines	3,799	5,928	1,752	450	1,104
Presses	162	594	319	516	1,038
Other machines	3,066	1,123	1,039	1,939	1,546
Machines for processing reaction resins	111	2,523	173	226	713
Crushing machines	1,337	2,772	1,281	2,607	1,133
Cutting, cleaving and peeling machines	5,294	6,369	3,387	6,358	2,531
	(All data in EUR 1,000)				

Table 2. Injection molding machines are the undisputed number one German export to Italy. Most process areas have recovered after the severe decline of 2009 (figure: VDMA)

Waiting for the Plast

Economic observers in Italy have noticed that the economy has been flagging somewhat of late. The experts disagree, however, as to whether this is due to the global economy or a reluctance to buy ahead of the plastics fair "Plast" in Milan in May, which, the organizers say, will be dominated by the sustainability, energy efficiency and recycling. The answer will be revealed in the weeks ahead. ■

Clemens Doriat, editor