

Industry figures:

270
companies in Italy

9,400
employees

162
Acimall member
companies

2,057
million euro
(production in 2016)

76%
domestic market
share on apparent
consumption

73%
of Italian production
is exported all over
the world



Industry representative, services to companies
and promotion of "made in Italy"



**Italian
Woodworking
Technology**

The Italian industry of woodworking technology

Woodworking technology production, the "flower in the buttonhole" of Italian industry, boasts a wide and diversified portfolio, from primary operation equipment for raw material to surface finishing systems, up to secondary processing of solid wood and wood-based panels.

Italy exports all over the world and its strong propensity to globalization has been one of the keys to overcome the crisis. Made-in-Italy, a synonym for quality, flexibility and innovation, is known and appreciated in each market, as witnessed by the growth of the industry in recent years.

In 2016, the Italian production of woodworking machinery and tools amounted to 2,057 million euro, with an increase by more than 10 percent compared to the previous year. This is a niche sector with two unique elements and very high added value.

The first peculiarity is the trade balance, which was active by 1,300 million in 2016, equal to 2.5 percent of Italy's entire foreign trade surplus. Such contribution is significant and increases year after year.

The second element is the share on apparent consumption, equal to 76 percent, which is really high: this means that the Italian woodworking industry, world leader for design and quality, prefers to purchase made-in-Italy technology. This is further evidence that Italian machinery manufacturers can respond effectively to all customers, wherever they are.

The year 2017 is a turning point for the domestic market. More than ever, companies have access to incentives for technology acquisition within the framework of the Industria 4.0 national plan, which aims at guiding the country into the fourth industrial revolution, optimizing production processes and their automation and interconnectivity.



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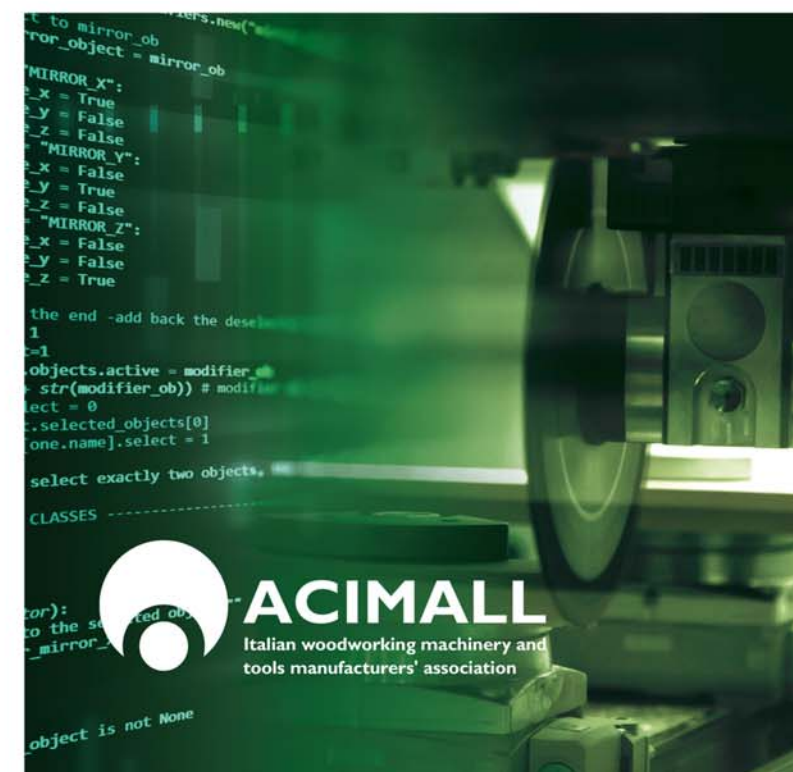
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ACIMALL
Italian woodworking machinery and
tools manufacturers' association

2016 final balance

The year 2016 recorded a positive trend compared to 2015, with 10.4 percent production increase, for a total value of 2,057 million euro. The result was largely supported by export, with a total value of 1,495 million euro representing 73 percent of domestic product.

For the first time since 2008, production has exceeded the 2 billion euro threshold, a trend that confirms last year's forecasts and suggests that 2017 might bring further growth, in view of the favorable international economic situation.

The value of domestic sales largely exceeded 500 million euro, up by 24.8 percent. Such variation indicates the potential that Italy can express as equipment buyer market. Also in 2017 a positive double-digit trend is expected.

2016 final figures:

	Value (million Euro)	Var.% 16/15
Production	2,057	10.4
Export	1,495	5.8
Import	181	19.4
Trade balance	1,314	4.1
Domestic market	562	24.8
Apparent consumption	743	23.4

Trends

The woodworking technology industry, following the trend of Italian and international economy, has suffered from an enduring period of crisis since 2008. The Acimall Studies Office calculates the order index of Italian companies at quarterly intervals, indicating the periods of expansion or recession of the industry.

The chart below illustrates the past five years, showing the gradual recovery as of 2011. Such gradual recovery accelerated in 2015 and gained momentum in 2016, driven by the Italian and global markets in general, so recovery can be considered structural.

The index of total orders was at 137 at the end of 2016, compared to the 100 base value of 2015, without considering inflation.



Italian export

Export is strategic for the woodworking machinery industry. The export propensity of the entire industry amounts to 73 percent of total production. Looking at each continent, most sales are shipped to Europe, with Germany and France in the top positions. Poland and the United Kingdom have recorded the strongest growth in recent years.

The second continent by share is America, headed by the United States, which stands at number one in the ranking of Italian export destinations. Then comes Asia, with a 16 percent share and China as the top destination market.

Italian export of woodworking machinery, 2016 Top 10 markets:

Country	Value (million Euro)	Var.% 16/15
United States	158	6.2
United Kingdom	103	55.1
France	97	25.3
Germany	97	3
Poland	83	8.7
China	67	33.3
Belgium	61	2.3
Spain	53	1.1
Turkey	42	-5.3
Russia	35	8.7

International competitors

With no figures available for the domestic market of many countries, the analysis of international competition is based on the export flows of the world's major woodworking machinery manufacturers. The analysis does not include tools, which are not identified by a unique customs code. Furthermore, it is not possible to identify triangulation and export of machinery manufactured offshore.

Germany preserves its historical leadership with over 2 billion euro worth of equipment exported in 2016, mainly due to the lack of competitors in specific segments, especially upstream the supply chain.

Italy remains at number two, close to one and a half billion euro of exported goods, with an extensive market coverage as a result of globalization policies that range from direct export, to reseller sales, up to foreign offices and sometimes even manufacturing sites abroad. According to tradition, the Italian offer is mostly concentrated in secondary wood processing, especially panel processing, although there are leaders also in other sectors.

China has strengthened the third position and has become an established manufacturing actor all over the world. Product prices, very affordable, have always been the key strength of Asian industries, but in recent years the technological standards of machinery have improved, which will inevitably lead to an adjustment of consumer prices. The most important business is still traditional machines.

The ranking of the top-six global exporting countries is completed by Taiwan, Austria and the United States.

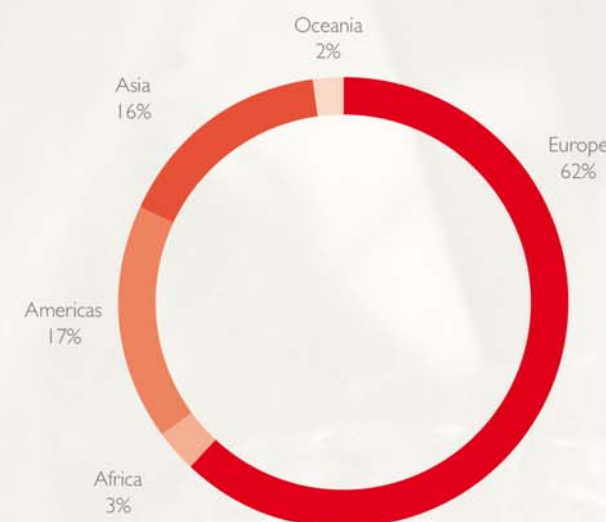
Production and export (historical series, million euro)



Index of Italian orders of woodworking machinery and tools (historical series, 2005=100)



Destination of Italian export of woodworking machinery (2016, share)



Woodworking machinery: export of the main manufacturers countries (2016, million euro)

