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INTERNATIONAL SCENARIO OF WOODWORKING TECHNOLOGY **A comparison among major competitors in the January-June 2014 period**

What is happening in the wood and wood-based materials processing industry worldwide? The question was answered by the Studies Office of Acimall, the Italian Woodworking Machinery and Tools Manufacturers' Association, member of Confindustria, that represents the companies of this industry.

The survey is based on the latest available figures and, for the January-June 2014 period, shows a positive trend for all major global competitors, namely – from top down – Germany, Italy, China, Taiwan, Austria and the United States.

Once again, **Germany** reaffirmed its role of world's leading exporter, with 788 million Euro, up by 0.44 percent, basically the same percentage that had been measured in the same period of the previous year.

Looking at percent results, the trend of **Italian export** is definitely better, up by 7 percent and close to a total value of 549 million Euro export in the six months under scrutiny.

At number three in absolute value, with 376 million Euro, there is **China**, whose export in the first semester of this year were estimated (we cannot avoid using this verb, as it is really difficult to get consistent data) to have grown by 13.6 percent, more or less twice as strong as Italy.

Export from **Taiwan** decreased by 8.8 percent (at number four with 252 million Euro in value), while at number five we find **Austria** (193.5 million Euro, plus 12.27 percent), and the **United States** at number six, with a woodworking technology export value of 136.4 million Euro in the first six months of 2014, 10.77 less than in the same period of the previous year. Among the top-six competitors, it is worth noticing that only the United States and Taiwan recorded a negative trend.

Obviously, the 7 percent growth of Italian export is a positive result, which we hope will be maintained at the end of the year.

China showed the best trend, one percent point higher than Taiwan, two percent above Austria and, as already mentioned, almost the double of Italy.

EXPORT FROM MAJOR PRODUCING COUNTRIES **January June 2014 (million Euro)**

| <i>Exporting country</i> | <i>Value</i> | <i>Δ% 14/13</i> |
|--------------------------|--------------|-----------------|
| Germany | 788.6 | 0.44 |
| ITALY | 548.9 | 7.06 |
| China | 376.8* | 13.60 |
| Taiwan | 252.2 | -8.80 |
| Austria | 193.5 | 12.27 |
| USA | 136.4 | -10.77 |

* Estimates.

Source: figures processed by Acimall's Studies Office
based on International Trade Center data, November 2014

IMPORT

And who are the best customers, the big spenders in woodworking technology? The analysis by Acimall's Studies Office provides valuable information also on the import side, with a ranking of the top-50 importers worldwide. The top position is taken by the **United States** which, in the first half 2014, imported woodworking machinery for a total value close to 434 million Euro (plus 17.7 percent compared to January-June 2013). At number two **Russia** (219.6 million Euro, plus 3.75 percent), although this result will be affected by the ruble devaluation and international sanctions in the second half. On the third step of the podium, **Germany** imported woodworking technology worth 187.4 million Euro (plus 6.5 percent).

The ranking continues with China (157.6 million Euro, minus 12.4 percent), Canada (115.3 million, minus 6.6 percent), France (107.4 million, plus 2.1 percent), Poland (97.5 million, plus 45.1 percent), Austria (94.9 million, plus 14.2 percent), Malaysia (83.5 million, plus 95.1 percent), United Kingdom (80.7 million, plus 31.5 percent), Belarus (73.4 million, plus 111.6 percent), Turkey (72.5 million, plus 19.3 percent), Switzerland (68.2 million, plus 30.9 percent), Belgium (60.6 million, 11.6 percent).

Down at number fifteen we find **Italy**, which in the first semester 2014 imported machinery (mainly from Germany and China) for a value of "only" 59.4 million Euro, 19.42 percent less than in the same period of 2013. We would love to say that this trend is due to the fact that domestic production fully covers national demand, but the hard truth is that such reduction is caused by the enduring low propensity to invest rather than a growing passion for "made in Italy".

More generally, we can add that in the top-50 ranking by import value, 36 countries recorded an increase of purchases from abroad. The strongest importers include **Poland** (plus 5 percent) and the **United Kingdom** (plus 31.5 percent); good results also for **Switzerland** and **Spain**, the latter probably ready to show tangible signs of recovery.

The greatest "disappointment" for major exporters, including Italian manufacturers, come from **Brazil**, which cut import by a significant 40 percent. Poor satisfaction also from **Thailand** (minus 20.2 percent) and **Mexico** (minus 18.6 percent), while in Europe, **Sweden**, **Norway**, **Ukraine** and **Hungary** stepped back by several positions.

For more information:

Luca Rossetti

+39 329 2197752

press@acimall.com

