



**ACIMALL**

Associazione costruttori  
italiani macchine  
ed accessori  
per la lavorazione del legno

*Italian woodworking  
machinery and tools  
manufacturers' association*

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**ACIMALL: THIRD QUARTER 2014**

The periodical survey about the **third quarter 2014** clearly shows a **significant growth in orders** of woodworking technology. The mood of industry representatives is still dominated by uncertainty, but results in different world regions are basically positive. In detail, we can say that euphoria in few markets (the **United States** and **Australia** above all) is offset by the difficult situation of **Russia** and its neighbor countries. Still below expectations the positive **rally of demand in the domestic market**. But let's take a look at figures: on the whole, orders have increased by 11.3 percent compared to the same period of 2013. Up by 11.8 percent also orders from foreign countries, while demand in the domestic market expanded by 9 percent.

Unfortunately, we are still far from the huge 28.7 percent increase in orders in the second quarter of this year compared to the April-June period in 2013; nevertheless, there is a positive sign to support a climate of confidence among industry actors and the supply chain.

The **orders book** currently covers a period of 2.6 months (versus 2.9 in April-June 2014), and since the beginning of the year, **prices** have increased by an estimated 1.3 percent, much better than the 0.8 percent increase recorded at the end of June.

According to the **quality survey**, 25 percent of the interviewed companies indicate a positive production trend, 50 percent stable and 25 percent decreasing (the latter were 11 percent in the previous quarter). **Employment** is considered stationary by 90 percent of the sample (versus 84 percent in the previous quarter) and growing by the remaining 10 percent. For the second quarter in a row, nobody is expecting a further reduction of employment. **Available stocks** are stationary according to 75 percent, decreasing according to 15 percent and growing according to the remaining 10 percent.

The **forecast survey** unfortunately shows a negative trend of confidence in the domestic market, compensated by enduring optimism for **export** sales. A bit less than half of the sample – 45 percent to be accurate – expects an increase in foreign orders in the short term, while 50 percent think there will be no variation. Only 5 percent expect a drop (balance is plus 40).

The **domestic market** is going to drop according to 15 percent of the sample, stable for 85 percent. None of the interviewed company owners and managers predicted expansion (balance is minus 15).

*"We can say that Italian technology for wood and wood-based materials is still in a positive area", said the Acimall director **Dario Corbetta**. "It is getting harder and harder to accept that the domestic market has such a low propensity to invest. However, in this situation of widespread dissatisfaction, the most proactive and innovative actors are expanding their market share abroad, as a result of strong commitment and continuous investments. In this respect, we hope that the extraordinary plan to support export devised by the Italian Ministry of Economic Development will soon receive the necessary resources to be deployed".*

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