



Associazione costruttori
italiani macchine
ed accessori
per la lavorazione del legno

*Italian woodworking
machinery and tools
manufacturers' association*

Acimall
Centro Direzionale Milanofiori
1° Strada - Palazzo F3
I-20090 Assago (Milano)
phone +39 02 89210200
fax +39 02 8259009
www.acimall.com
info@acimall.com

press office
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ITALIAN WOODWORKING TECHNOLOGY 2013 BALANCE, TOPICS AND TRENDS

04

THE ECONOMIC SCENARIO OF THE INDUSTRY

2013 was a substantially stable year. According to the preliminary figures processed by the Studies Office of Acimall, **production** amounted to 1,537 million Euro, down by 2.1 percent compared to 2012. **Export** totaled 1,187 million Euro, equal to 77 percent of total production, confirming the strong propensity of “made in Italy” technology to be present all over the world. Acimall analysts estimate that, in 2013, Italian machinery export accounted for **18 percent of global offer**, confirming the international leadership of “made in Italy” products in this industry.

2014 FORECASTS

It is normally very difficult to make short-term forecasts, especially in a difficult economic situation like the current one, with continuous trend changes. It is impossible to venture a percentage, a value: it would be gambling.

Yet, it is possible to identify some trend lines that seem to come out from the latest figures available and ongoing relations with markets and operators of all the world. 2014 could finally bring a **recovery of the domestic market**, although it is unlikely that it will reach a significant percentage. The situation abroad is more complicated— though characterized by partial stability and preservation of the leadership positions of Italian export – with warning signs for some markets. First of all **Russia**, which might experience further developments of the current political situation, with an “involvement” of the economy. In addition, a “quieter” season might open in **Brazil**, after strong growth in recent years that cannot be defined as structural. On the contrary, great satisfaction might come from the **United States** and other mature markets.

RELATIONSHIPS WITH DYNAMIC MARKETS

From January to December 2013, export to the Far East increased by 17 percent. This growth, definitely sustained, was driven by **China**, the largest market in the region (54.5 million Euro, plus 40.6 percent), and by **India** and **Indonesia**, which purchased Italian machines for a value of 12 and 8 million Euro respectively.

North American countries purchased 19.5 percent more from Italy than in the same period of 2012, absorbing 10 percent of Italian export for a total value of 114 million Euro. Within this picture, growing export figures were recorded towards the **United States** (85 million, plus 16 percent) and **Canada** (18 million, plus 29.2 percent).

Among the **Bric Countries**, it is important to notice that **Russia** invested in Italian technology for a total of 60 million Euro, down by 8.8 percent compared to 2012.

BUSINESS RELATIONS WITH MATURE MARKETS

The figures for January-December 2013 clearly show that the **European Union** is still the main destination of Italian woodworking technology, absorbing as much as 43.5 percent of export. **Germany** is still the most attractive market, despite a 13 percent reduction compared to 2012. Among the other markets, a major destination was **France** with a value of 71 million Euro. Mature markets which are recording strong shrinkage also include **Spain** and the **Czech Republic**, losing 19 and 38 percent respectively.

