



Associazione costruttori
italiani macchine
ed accessori
per la lavorazione del legno

*Italian woodworking
machinery and tools
manufacturers' association*

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WOODWORKING MACHINERY: ITALY BETTER THAN EXPORT

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The **first quarter 2014** is showing some tangible, encouraging signs on the domestic market in Italy. The feeling is that it is going to take long still, but we can finally talk about "early signs of structural recovery". Foreign markets, though slightly shrinking, are still playing a key role for Italian companies, that in recent years have maintained their order volumes thanks to export.

This is the key trend emerging from the results of the traditional **market survey**, carried out by the Acimall Studies office on a statistic sample representing the entire industry. **Orders** for the Italian woodworking machinery and tools industry recorded a 0.7 percent increase compared to the same period of last year. A slight drop, as already mentioned, affected orders from abroad (down by 1.5 percent), as opposed to a significant increase in domestic orders, up by 7.9 percent compared to the first quarter 2013.

The **book of orders** is at 2.5 months, while **prices** have been growing by 0.6 percent since the beginning of this year.

Based on the indications of the sample companies, the **quality survey** gave the following results: 50 percent indicated a positive production trend, 32 percent stable and 18 percent decreasing. **Employment** is considered stationary by 68 percent of the sample, falling by 27 percent and increasing by 5 percent. **Available stocks** were stationary according to 59 percent, decreasing according to 18 percent and growing according to the remaining 23 percent.

The **forecast survey** outlines possible short-term industry trends. There is solid optimism for foreign markets, and also on the domestic side, the outlook is more positive in view of improved confidence from the previous period; this attitude may suggest good results in the second half of this year.

Foreign orders will grow according to 50 percent of the sample, while they are expected to stay at the same level according to 46 percent. The remaining 4 percent expects a drop (balance is plus 46). The forecast survey on the domestic market indicates a decline according to 18 percent of the sample, while 50 percent expect domestic sales to remain stable. 32 percent of companies predict short-term growth (balance is plus 14).

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