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INTERNATIONAL SCENARIO OF WOODWORKING TECHNOLOGY
A comparison among key competitors in 2014

We are back to the question that periodically comes out in the agenda of the Studies Office of Acimall, the Italian woodworking machinery and tools manufacturers' association. The question is very important: what is happening in the wood and wood-based materials processing industry worldwide? Who are the major competitors and what's their export trend? To update the situation − thus having a clear view of the trends of global technology markets in our industry − Acimall analysts have processed the latest available figures, as usual, drawing a detailed map of major "global flows" in the January-December 2014 timeframe.

The first evidence is that last year, as shown in the table below, five top competitors − Germany, Italy, China, Taiwan and Austria in decreasing order − recorded a **positive trend**. Only the **United States** closed 2014 with a negative result, minus 0.7 percent, which however should be considered a sign of substantial stability and stronger attention to the domestic market, which in the past two years was the liveliest on a global scale.

EXPORT FROM MAJOR PRODUCING COUNTRIES
January-December 2014 (million euro)

Exporting country	*Value*	*∆% 14/13*
Germany	1,786.1	23
ITALY	1,169.8	5.3
China*	964.0	22.0
Taiwan	517.0	13.5
Austria	397.8	11.9
Usa	281.74	-0.7

* Estimated.
Source: figures processed by Acimall's Studies Office based on International Trade Center data, May 2015.

The first place in the ranking of global exporters is still held by **Germany**, a leadership that can be hardly challenged. Germany closed the year with much better results than could be expected after the first six months of the year: after plus 0.44 percent in the January-June period, a much stronger 2.3 percent increase over 2013 was achieved in the second half, with an export value close to 1.8 billion euro.
Italy remains the runner-up, proving its capacity not only to face all the global markets, but also to offer high-level technology in all application domains. Made-in-Italy export amounted to 1,169.8 million euro, which means a final result of plus 5.3 percent compared to 2013. Unfortunately, the

annual growth rate was not in line with the more positive 7 percent result achieved in the first half of 2014, which means that Italian export in the second half was less “lively”.
The third place by value was taken by **China**, with 964 million euro export and 22 percent growth over 2013. These are actually estimates, as economic data from this country are not always consistent and comparable. Notice that that things went better for Chinese technology in the second half than in the first one. In the January-June period, export amounted to 376 million euro, 13.6 percent more than in the first six months of 2013.
When we presented our six-month report, we pointed out that the growth rate of Chinese export was virtually twice bigger than Italy’s, and now the proportion has changed further to 4:1 (plus 22 percent for China, plus 2.3 percent for Italy). In absolute value, the gap has shrunk to just 200 million euro approximately (1,169 versus 964 million). However, “made in Italy” can be satisfied with an export growth rate in 2014 that was double than its German competitors.
Taiwan, at number four in the ranking with 517 million euro, recorded a satisfactory 13.5 percent growth compared to 2013 export; place number five went to **Austria**, close to 400 million (plus 11.9 percent from the previous year).
The last position in the ranking was taken by the **United States**, with an export value of 281.7 million euro, as the only competitor that lost shares from 2013, as already mentioned.
More generally, it can be stated that the health conditions of wood and wood-based materials processing are not arousing worries on a global level, with widespread export expansion that − despite all caution − suggests a constant growth of global demand.

IMPORT
Let’s take a look at the opposite face of the coin: who are the biggest users, the best customers for wood technology suppliers? Every six months, the Acimall Studies Office publishes a list of the **top-fifty destination countries**, based on Uno statistics (www.intracen.org).
A quick glimpse at the document immediately reveals that the **United States** are the world’s biggest market: in 2014 they purchased woodworking technology from abroad for a total value just below one billion euro (987.6 million), up by 18.1 percent from 2013. The runner-up has not changed either: despite the well-known economic and political troubles, **Russia** closed 2014 at plus 4.5 percent, with import worth 554.3 million euro.
Germany remains the third biggest "consumer country" (401.3 million, plus 5.8 percent), followed by **China** (331.6 million euro), with imports down by 6.2 percent from 2013. Slight decrease (minus 0.14 percent) also for **Canada**, which bought foreign technology for 249.7 million euro. **France** is growing (247 million, plus 9.1 percent) and **Belarus** even more, scoring an amazing 143.2 percent growth with a total value slightly below 221 million euro.
In decreasing order of value, the ranking continues with the United Kingdom, Poland, Austria, Malaysia, Turkey, Switzerland and − at number fourteen − **Italy**, with 126.3 million euro import, i.e. 13.2 percent less than in 2013. The vast majority comes from Germany and China, with the former addressing the medium-high end of the Italian market, and the latter focused on "facilities", equipment with low-tech content.

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