Interview

2018 will be positive for the Italian machine tool industry

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Massimo Carboniero, President of UCIMU-SISTEMI PER PRODURRE (Source: UCIMU-SISTEMI PER PRODURRE)

Massimo Carboniero, President of UCIMU-SISTEMI PER PRODURRE shares his views on the Italian machine tool industry along with statistics on the country's import-export sceanrio.

What is the current market scenario of the Italian machine tool industry?

Massimo Carboniero: With over 400 enterprises, 32,000 employees and a turnover that exceeded 8 billion euro in 2017, the Italian machine tool industry plays a primary role in the international scenario. The country occupies the fifth position in the global rankings of manufacturing countries and secures the third spot among exporters.

2017 was positive for the Italian machine tool, robotics and automation industry reporting double-digit increases for all main economic indicators. 2018 will be just as positive, confirming the excellent situation that the Italian industry of the sector has been experiencing, rewarded not only by a re-strengthened domestic market but also by exports that started to record strong rises again.

Indeed, after an unsatisfactory 2016, the 'Made in Italy' exports of the sector are growing again, recovering all ground lost in the previous year. The trend will also be positive in 2018, according to the latest collection of data processed by the Studies Department & Business Culture of UCIMU.

The Italian Government has undertaken the 'Industry 4.0' initiative for boosting the sector. How has this helped the industry?

After a period of difficulties since 2014 Italy has restarted to invest in manufacturing systems and, in the last year, the demand increase reached

record-breaking levels. The trend was supported by two important government measures: Super-and Hyper-Depreciation, at 140 % and at 250 % respectively.

The effectiveness of these instruments, pillars of the Government Plan 'Industry 4.0', is measured according to the trend of orders collected by manufacturers in the four quarters of 2017. The detail of the quarterly situation in the domestic market is +22 % in the first quarter, + 28.5 % in the second, +68 % in the third and +86 % in the fourth quarter. Although the increases have been calculated compared with the same period of 2016, it is clear that, in the second part of the year, after banishing some doubts about technicalities and methods of use with regard to the mentioned incentives, the manufacturing companies increased their investment plans, acquiring machine tools and technologies with Industry 4.0 content.

If we consider the latest data (concerning the period October-December 2017), the collected orders will have a direct impact on production and on the GDP of 2018, as this year the incentives of Super-and Hyper-Depreciation are still active. All this makes us say that the current year will be positive, as actually confirmed by the data regarding the collection of applications to exhibit at BI-MU, one of the most important international trade shows for the manufacturing industry, taking place from October 9–13, 2018.

Indeed, 9 months before the event, 600 companies have already registered as exhibitors and booked an exhibition area that is three times as big as that of the past edition (2014). In addition to the favourable market, the next edition of BI-MU will rely on a new concept, which implies a wider, updated technological product range and a lot of novelties: not only metal drilling and cutting machine tools, automation, robotics, auxiliary technologies, but also manufacturing and digital enabling technologies. This is the core of the new BI-MU that will present 'The digital era of machine tools'. The new interpretation of BI-MU is enjoying great appreciation by Italian and foreign enterprises that have already booked many large-sized exhibition stands. We are sure that this event will be of great appeal to the operators of the sector.

Which are the important markets you are targeting for growth in the machine tool sector? Kindly elaborate on this.

Export is a very important part in the turnover of our enterprises. It is enough to consider that even today, despite a really lively and receptive Italian market, more than half of 'Made in Italy' production of the sector is exported. China, Germany, United States, France, Poland, Spain, Mexico, Turkey, Russia and the United Kingdom turned out to be the first ten destination countries of our exports in the first ten months of 2017 (latest available data). These are very heterogeneous countries from a geographical and cultural point of view, as a testimony to the capacity of Italian machine tool manufacturers to interpret the demand requirements and propose customised solutions. If we look to the future, in 2018, exports should start to grow again. The top destinations of our sales will be, as usual, the established markets, such as Germany, United States, China, France, Poland and Spain.

However, there are several interesting emerging areas that are monitored by UCIMU such as India, Iran and the ASEAN countries. These countries have

involved in a process of industrialisation and development, which has registered a strong acceleration over the last few years.

What is the current import-export market scenario of the Italian machine tool industry?

High qualitative standards, marked customization of product offering according to customers' requirements and special care for the after-sale service: these are the main features of the sector's 'Made in Italy' strategy. Thanks to this special combination, Italy has always been among the leading countries with regard to metal machining. Again this year its third position was confirmed in the ranking of machine tool exporting countries, only behind Germany and Japan, but ahead of China, Taiwan, Switzerland and South Korea.

In 2017, a share of 55 % of the global Italian output was sold abroad, for a total amount of 3,440 million euro. Italy imported 1,720 million euro of machine tools, corresponding to 39.2 % of the total consumption of the country in 2017, (preliminary year's data, Studies Department & Business Culture of UCIMU). In the first 10 months of 2017, the countries that sold more machine tools in Italy were Germany 304 million euro, Belgium 106 million euro and Japan 92 million euro.

In the future, Italy intends to go on competing in the international scenario.

Thank you for the interview.

Italy: Tailor-made solutions

10/05/2017 - The Italian industry has been growing for several years now. Massimo Carboniero, President of Ucimu, has given us an insight into the most important target markets of Italy, the global challenges Italy has to face, and how the Italian government managed to support the industry to assure a solid growth over the last few years. read...

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