



UCIMA

Italian Packaging Machinery Manufacturers Association



The Italian Packaging Industry

**Riccardo Cavanna,
UCIMA Vice-Chairman**



Who's UCIMA

- UCIMA is the Italian Packaging Manufacturers Association
- Founded in 1984, it is a point of reference for the sector, both in Italy and abroad
- UCIMA gathers 140 companies which represent 70% of sector turnover and 80% of export
- It is member of CONFINDUSTRIA, the Italian Industrial Confederation
- UCIMA's end users sectors are Food, Beverage, Pharma, Tobacco, Chemical, Cosmetics, Tissue, ...



The Italian packaging industry

- ~600 companies (~400 industrial-sized + ~200 smaller companies)
- Companies are based mainly in Northern Italy regions:
 - Emilia Romagna (world's highest concentration of sector firms, called the Packaging Valley)
 - Piedmont
 - Veneto



Factors of success

- High production flexibility combined with utmost reliability and technological innovation;
- Combine leading-edge electronic technology and traditional mechanical technology (leadership in mechatronics);
- Follow market trends, offering more frequently integrated packaging lines instead of single machines;
- Invest huge resources in research and development and innovative packaging materials with low environmental impact;



Factors of success

- Strong customer orientation: production tailored to the specific needs of individual companies;
- Great attention to design, testing, quality control and customer analysis;
- Understanding and fully satisfying the "aesthetic" and marketing needs of customers, balancing them with their technical/construction requirements;
- Internationalization, through service centres linked to local branches and agents, assisted by technical experts.



Key sector indicators

	2012
Production	€ 5.5 billion
Domestic sales	€ 941 million
Exports	€ 4.6 billion
Imports	€ 363 million
Export rate	82.9%
Import/Consumption	27.8%
Employees	26,348
Companies	~600

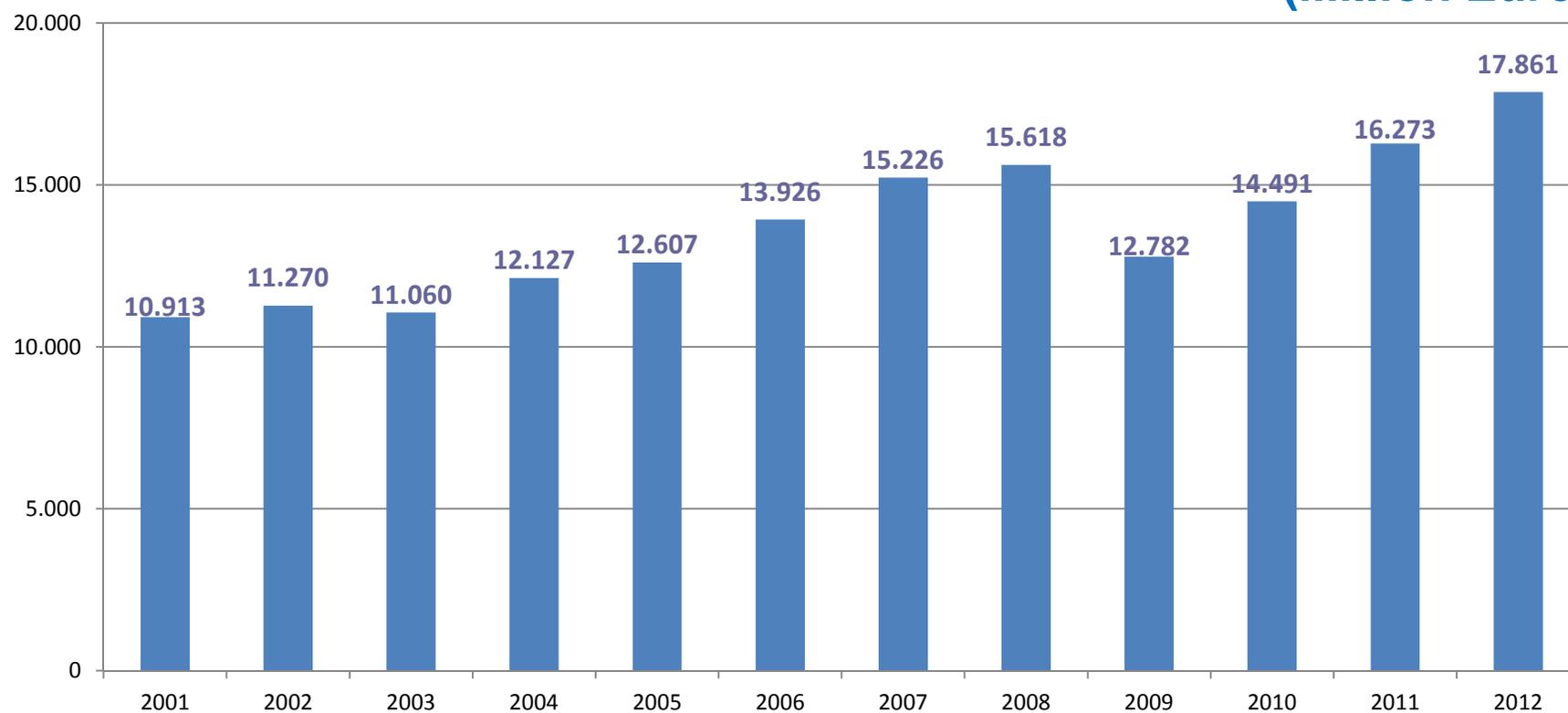
* Data in Euros

Source: UCIMA Economic Dept.

Table 1



World trade of packaging machinery (Million Euros)

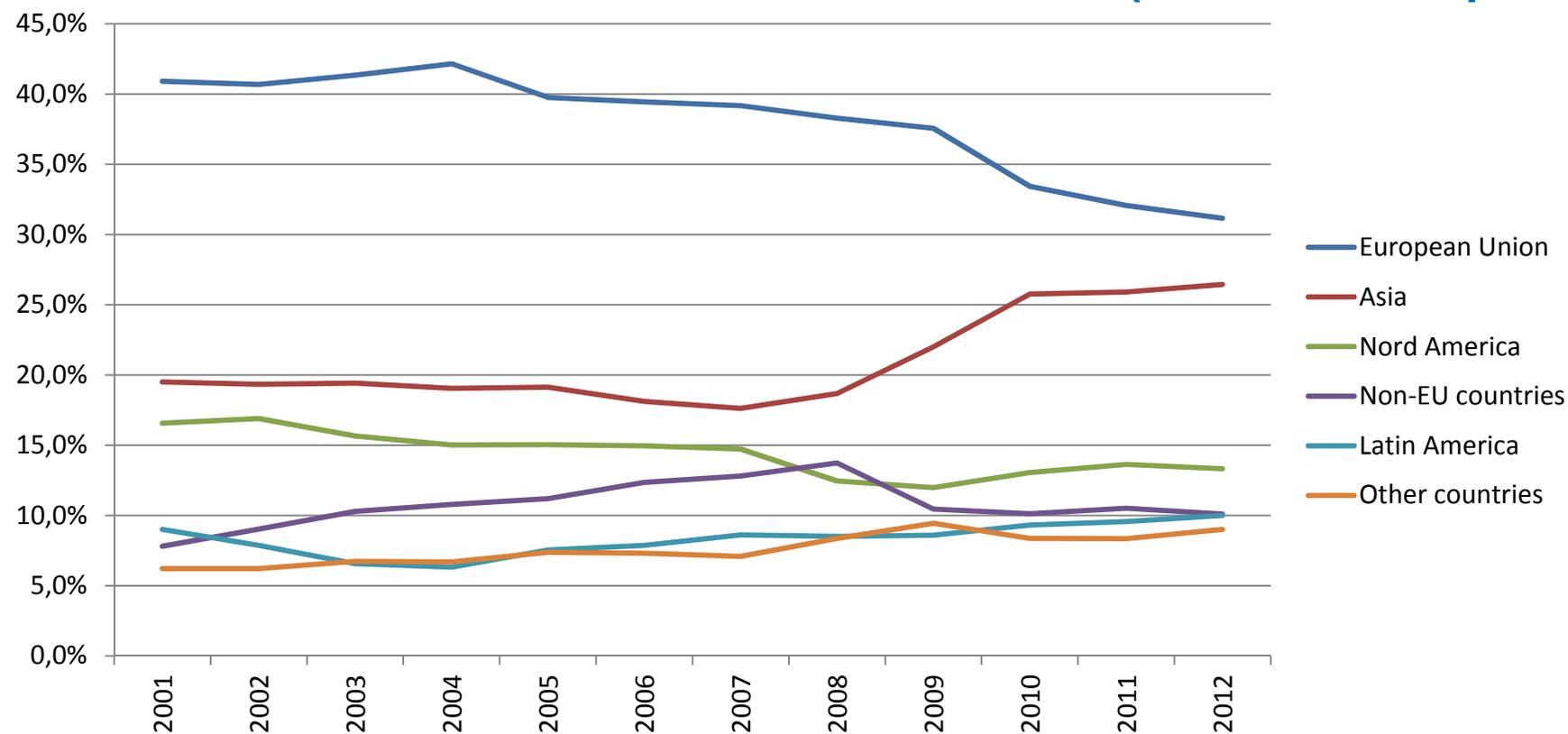


* Data in Euros

Source: UCIMA Economic Dept.

Table 2

The key markets for world manufacturers (% on world imports)



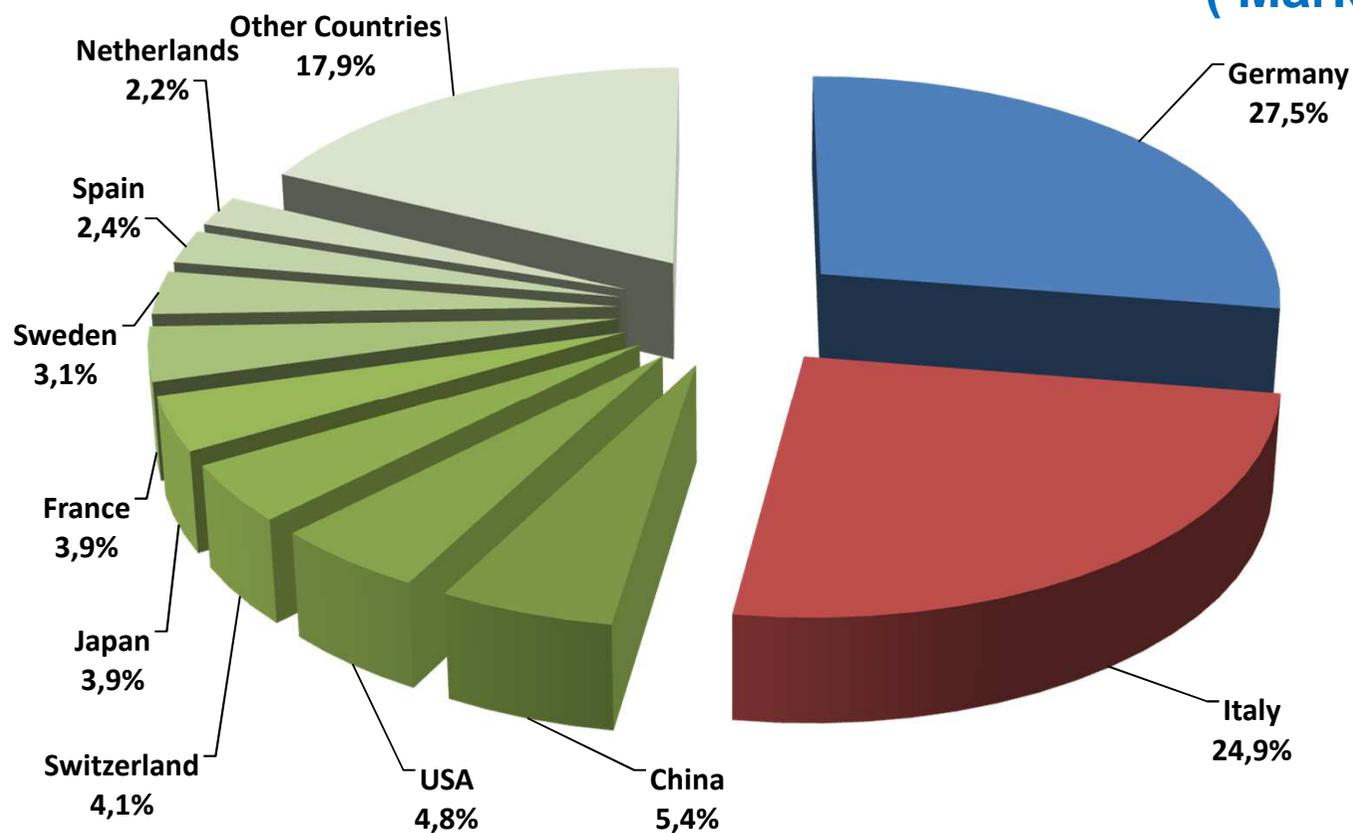
* Data in Euros

Source: UCIMA Economic Dept.

Table 3

World trade of packaging machinery in 2012

(Market shares in %)



Italian Exports by Major Destination Countries

Country	2010	2011	2012	Var.% 12/11
USA	271,664	360,347	388,560	7.8
France	259,760	332,516	368,659	10.9
China	394,153	385,268	297,368	-22.8
Germany	188,021	198,247	279,328	40.9
Russia	142,234	162,435	179,423	10.5
United Kingdom	138,806	135,000	157,800	16.9
Brazil	124,084	131,089	156,961	19.7
Turkey	96,127	128,595	134,262	4.4
Mexico	113,658	107,209	133,350	24.4
Spain	143,941	153,595	125,089	-18.6
Angola	7,821	4,775	11,068	+131.8
Other countries	1,816,117	2,130,329	2,220,030	4.2
Total	3,678,950	4,233,873	4,451,897	5.1

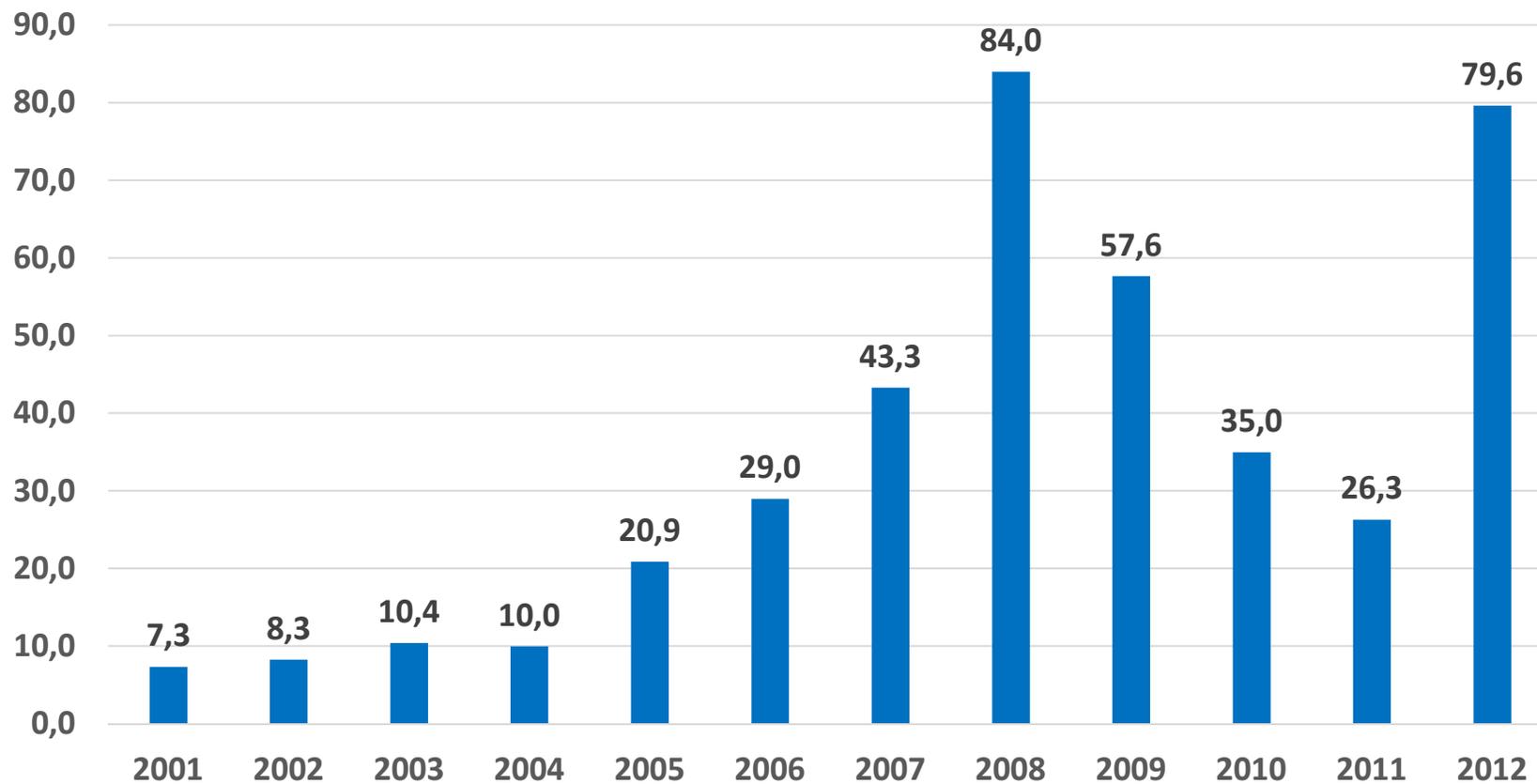
*Values in thousand euros

Source: UCIMA Economic Dept. on ISTAT data

Table 5



Angola Packaging Machinery Imports (million Euros)

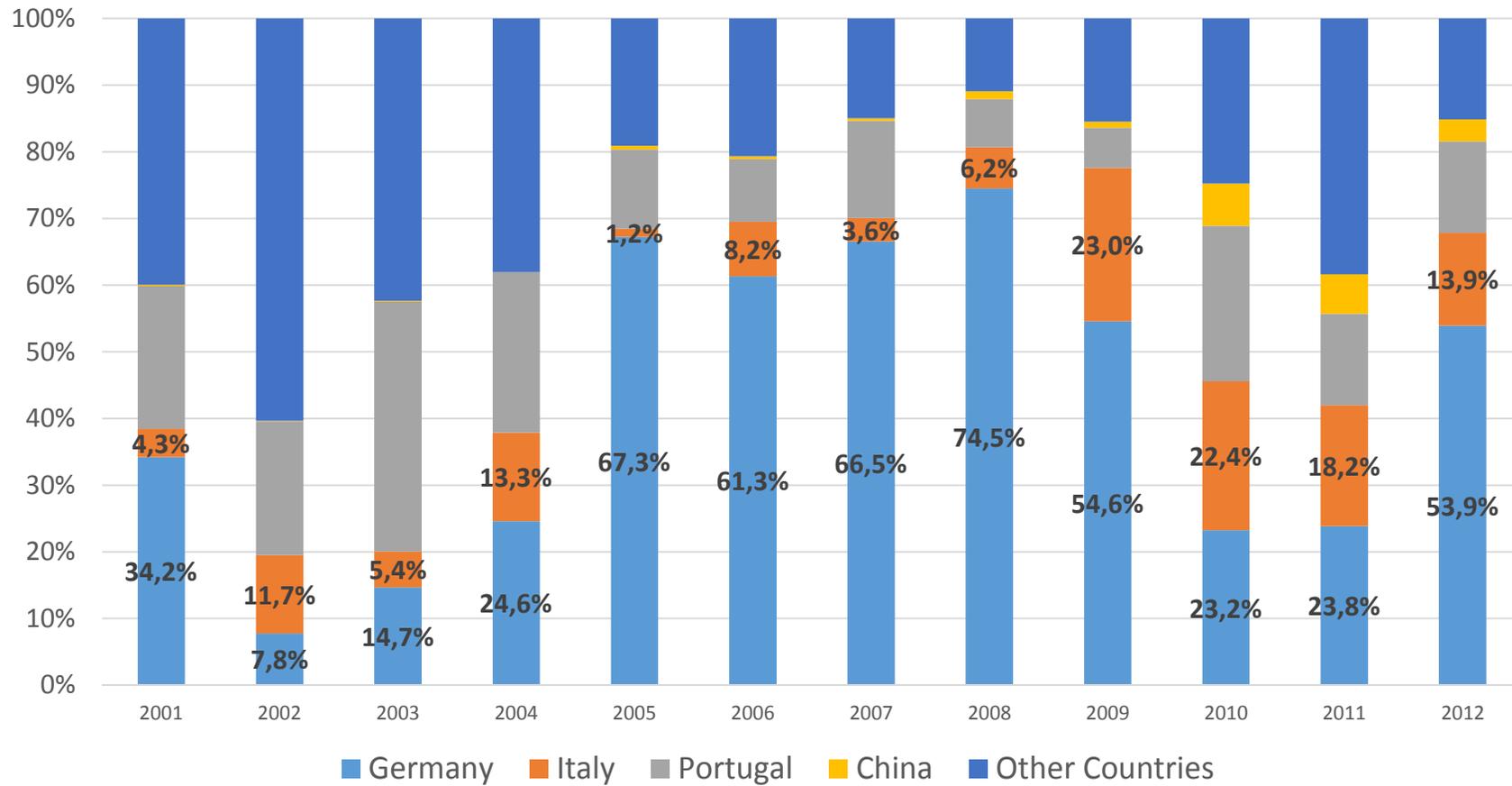


Source: UCIMA Economic Dept. on ITC data

Table 6



Export to Angola: Market shares

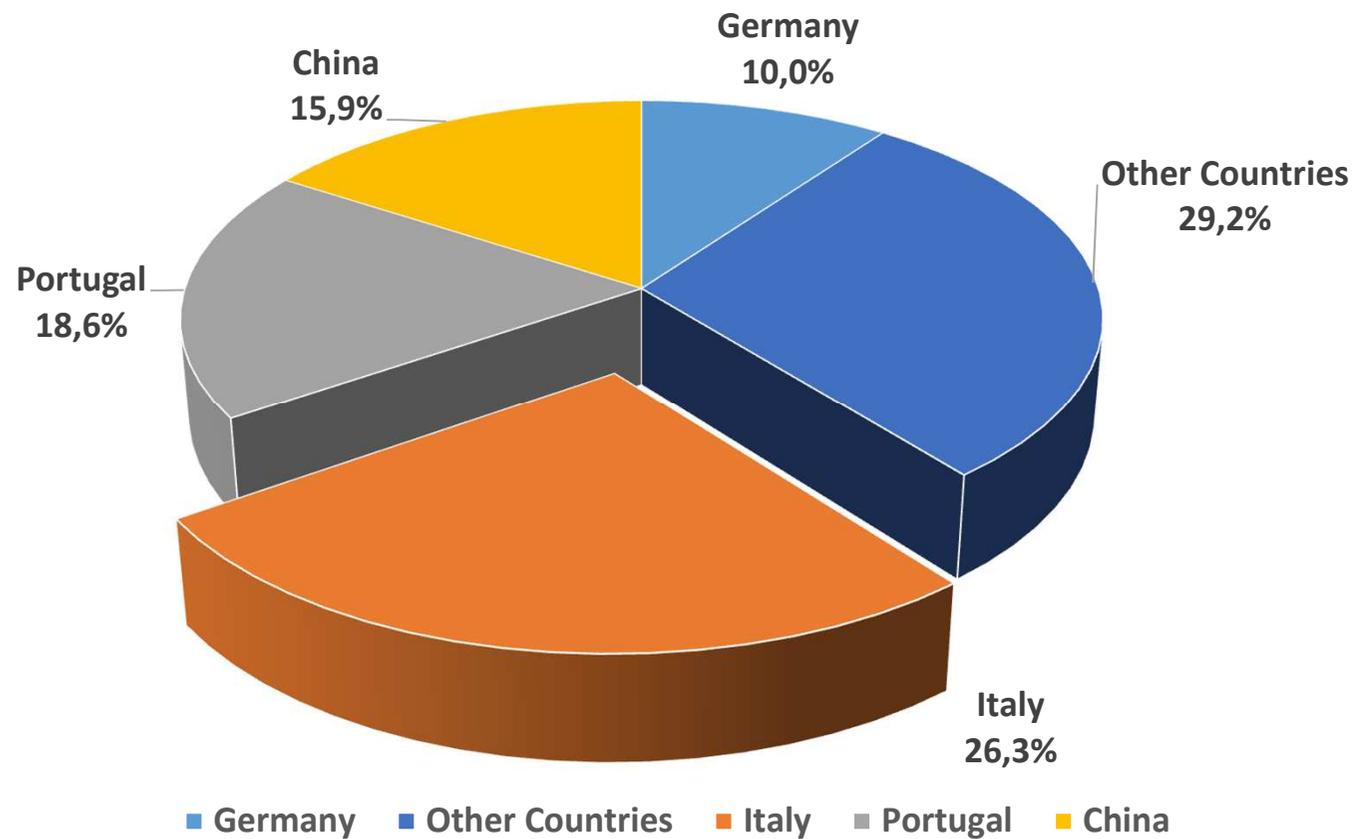


Source: UCIMA Economic Dept. on ITC data

Table 7



Export to Angola in 2013 – Jan/Jun



Source: UCIMA Economic Dept. on ITC data

Table 8



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**Thanks for your
attention**

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