



ACIMAC

Association of Italian Manufacturers of
Machinery and Equipment for Ceramics



PRESS RELEASE

Modena, 1 July 2019

Slowdown in ceramic machinery sales

The decline in investments in the construction sector in many countries worldwide has also affected manufacturers of capital goods for the ceramic industry.

The industry's revenue has fallen by 3.5% to 2.1 billion euros. Exports have been the worst hit with a 4.3% decline.

After five years of growth culminating in the record results achieved in 2017, the total revenues generated by the manufacturers of machinery and equipment for ceramic and heavy clay suffered a **3.5% decline** in 2018 to a total value of **2.158 billion euros**.

According to figures published by the research department of Acimac (the industry's national trade association affiliated to Confindustria), this result was driven by a slight fall in domestic Italian sales (-1.3%) to **573.1 million euros** and a bigger contraction in **exports (-4.3%) to 1,585.1 million euros**.

There were slight falls in the number of companies, 143 compared to the 148 of 2017, and employees, which dropped by 5.1% to 6,905 following the strong growth of 2017.

"We've seen a slowdown in many countries' economies since the middle of last year, including widespread stagnation in construction, a sector we are closely allied to," said Acimac's Chairman **Paolo Sassi**. "Over the last five years, our customers had made significant investments in renovating their production plants so a falloff in revenue was only to be expected," continued Sassi.

Exports

The best performances were in the markets that had been least dynamic in the past. The Russian Federation, Ukraine and other Eastern European countries saw 77% growth with respect to 2017 to a value of 238.4 million euros, becoming the second largest market after the EU.

Excellent results were achieved for the second year running in China and Taiwan, where the ceramic machinery manufacturers' sales grew by 25% to 129.7 million euros.

Sales performed strongly in Africa and particularly in Algeria where local customers invested 186 million euros in Italian technologies.

Conversely, the biggest contractions occurred in North America (-23.7%), where the Tennessee manufacturing district reached the end of its positive growth cycle, and in the Middle East.

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Client sectors

As for client sectors, **the tile sector** continued to dominate in 2018, accounting for 86.5% of total revenue with a value of 1.867 billion euros despite a 3.1% year-on-year contraction.

By contrast, sales to Italian tile manufacturers grew by 1.8% over the previous year.

The **sanitaryware** sector likewise saw a contraction, dropping from 115.5 to 106.7 million euros (-7.6%), but climbed to second place in the rankings of sectors served by the machinery manufacturers.

The **brick and roof tile** machinery sector was hit by the sharp contraction in exports (-29.2%) and dropped to third position, down from 125.1 to 90.5 million euros (-27.6%).

In fourth place came sales to producers of **refractory materials** with revenue of 55.1 million euros, 37.3% up on last year's 40.1 million euros.

2019 forecasts

Several important markets continued to stagnate in the first few months of the year, so the outlook for 2019 is very cautious. "We expect the situation in some markets to remain critical, while in others we are beginning to see a slight recovery," commented Sassi. "We are therefore expecting our revenues to remain stable at above 2 billion euros in line with the figures for the previous two years," concluded Sassi.

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