



ACIMAC

Association of Italian Manufacturers of
Machinery and Equipment for Ceramics



**MAIN RESULTS FROM THE
24th NATIONAL STATISTICAL SURVEY
ON THE ITALIAN CERAMIC MACHINERY MANUFACTURING INDUSTRY**

Modena, 24th June 2016

Data released by Centro Studi ACIMAC



The Italian ceramic machinery industry

	2015	2014	Var. 2015/2014
<i>Number of companies</i>	148	152	-4 units
<i>Number of employees</i>	6.229	6.203	+ 0,4%
<i>Total turnover (million €)</i>	1.982,8	1.836,2	+ 8,0%
- <i>Italian Turnover (million €)</i>	460,8	441,7	+ 4,3%
<i>% on total turnover</i>	23,2%	24,1%	
- <i>Exports (million €)</i>	1.522,0	1.394,6	+ 9,1%
<i>% on total turnover</i>	76,8%	75,9%	



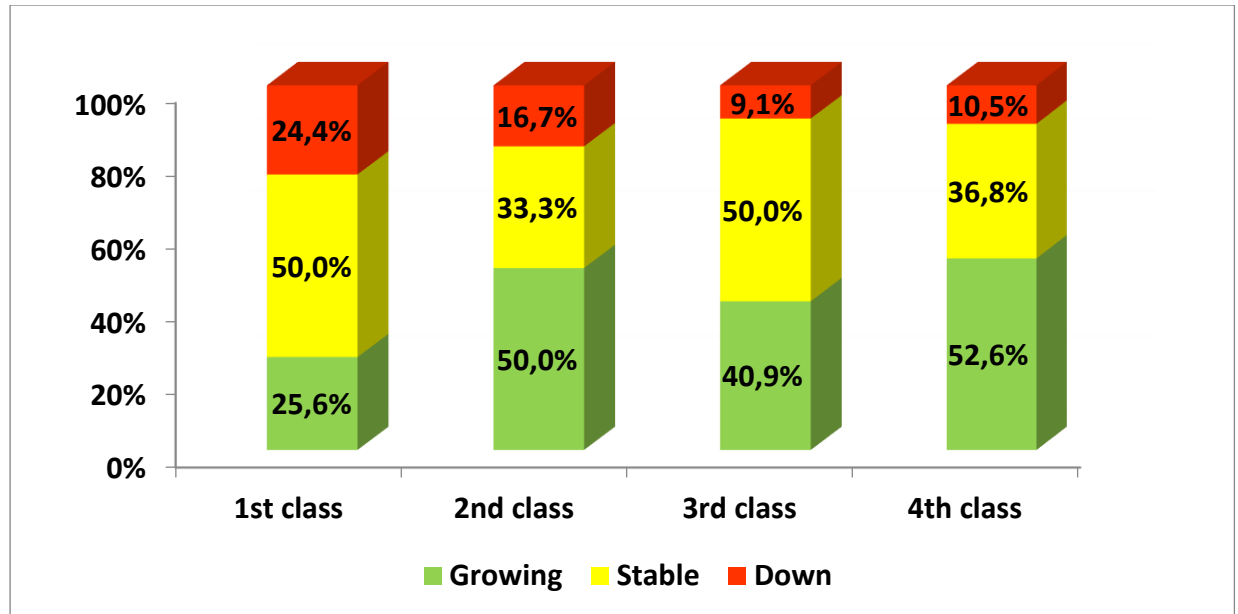
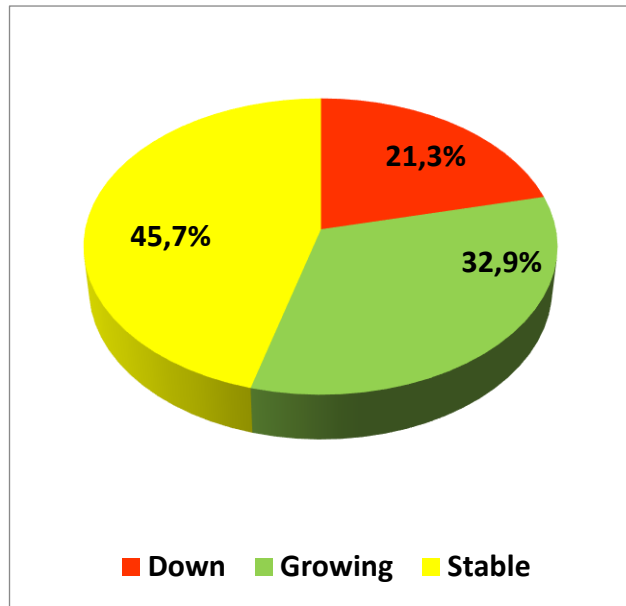
Turnover analysis related to business range classification – period 2015-2014

(Values in million Euros)

CLASS	Nr. Companies			Domestic sales			Exports			Total Turnover		
	2015	2014	Unit var	2015	2014	Var. %	2015	2014	Var. %	2015	2014	Var. %
1st class from 0 to 2.5 mil €	76	86	-10	45,5	53,3	-14,6	44,5	47,5	-6,3	90,0	100,8	-10,7
2nd class from 2,5 to 5 mil €	31	25	+6	47,3	31,9	48,4	55,9	57,8	-3,3	103,2	89,7	15,1
3rd class from 5 to 10 mil €	22	24	-2	60,8	58,3	4,3	88,2	104,2	-15,3	149,0	162,5	-8,3
4th class over 10 mil €	19	17	+2	307,1	298,2	3,0	1.333,4	1185,1	12,5	1.640,5	1.483,2	10,6
Total	148	152	-4	460,8	441,7	4,3	1.522,0	1394,6	9,1	1.982,8	1.836,2	8,0



Performance of companies in 2015



Growing: more than +10% on 2014 turnover

Stable: from +10% to -10%

Down: less than -10%



Turnover breakdown by “Client Sectors” (period 2015-2014)

(Values in million Euros)

	Domestic Sales			Exports			Total Turnover		
	2015	2014	Var. %	2015	2014	Var. %	2015	2014	Var. %
Ceramic Tiles (% value)	413,2 (89,7)	399,6 (90,5)	3,4	1.222,4 (80,3)	1.142,2 (81,9)	7,0	1.635,6 (82,5)	1.541,8 (84,0)	6,1
Heavy Clay (% value)	16,5 (3,6)	15,1 (3,4)	9,2	139,6 (9,2)	97,7 (7,0)	42,8	156,1 (7,9)	112,8 (6,1)	38,3
Tableware (% value)	1,1 (0,2)	2,2 (0,5)	-52,8	16,9 (1,1)	6,6 (0,5)	156,3	18,0 (0,9)	8,8 (0,5)	103,1
Sanitaryware (% value)	22,7 (4,9)	12,7 (2,9)	78,6	104,2 (6,8)	88,1 (6,3)	18,4	126,9 (6,4)	100,8 (5,5)	25,9
Refractories (% value)	3,8 (0,8)	7,4 (1,7)	-48,3	35,5 (2,3)	39,1 (2,8)	-9,3	39,3 (2,0)	46,5 (2,5)	-15,5
Other ceramics (% value)	3,5 (0,8)	4,7 (1,1)	-25,2	3,4 (0,2)	20,8 (1,5)	-83,5	6,9 (0,3)	25,4 (1,4)	-72,8
Total (% value)	460,8 (100)	441,7 (100)	4,3	1.522,0 (100)	1.394,6 (100)	9,1	1.982,8 (100)	1.836,2 (100)	8,0



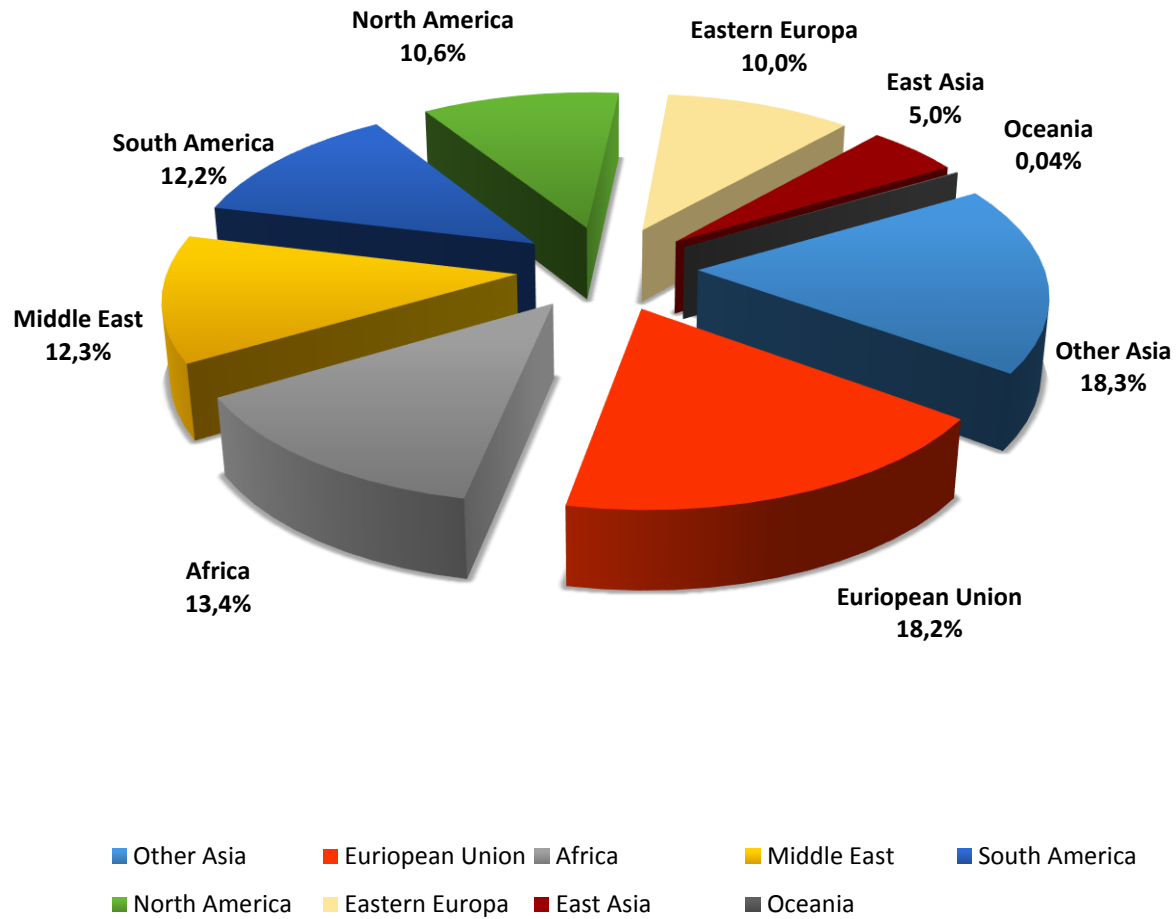
Turnover breakdown by “machinery families” (period 2015-2014)

(Values in million Euros)

	Domestic Sales			Exports			Total Turnover		
	2015	2014	Var. %	2015	2014	Var. %	2015	2014	Var. %
Earth Preparation (% value)	40,3 (8,7)	31,7 (7,2)	27,1	199,6 (13,1)	189,5 (13,6)	5,3	239,9 (12,1)	221,2 (12,0)	8,5
Forming (% value)	58,6 (12,7)	68,9 (15,6)	-14,9	420,3 (27,6)	407,2 (29,2)	3,2	478,9 (24,2)	476,1 (25,9)	0,6
Dies (% value)	44,7 (9,7)	43,7 (9,9)	2,3	53,1 (3,5)	53,4 (3,8)	-0,6	97,8 (4,9)	97,1 (5,3)	0,7
Drying (% value)	13,3 (2,9)	12,3 (2,8)	7,8	80,1 (5,3)	63,6 (4,6)	25,8	93,4 (4,7)	76,0 (4,1)	22,9
Glazing and decoration (% value)	31,2 (6,8)	28,2 (6,4)	10,6	84,7 (5,6)	75,3 (5,4)	12,5	115,9 (5,8)	103,5 (5,6)	12,0
Digital decoration (% value)	53,6 (11,6)	51,9 (11,8)	3,1	139,6 (9,2)	134,9 (9,7)	3,5	193,2 (9,7)	186,9 (10,2)	3,4
Storage and handling (% value)	47,5 (10,3)	47,7 (10,8)	-0,4	138,6 (9,1)	124,6 (8,9)	11,2	186,1 (9,4)	172,3 (9,4)	8,0
Firing (% value)	31,2 (6,8)	31,5 (7,1)	-1,0	194,8 (12,8)	160,3 (11,5)	21,9	226,0 (11,4)	191,8 (10,4)	17,8
Finishing machines (% value)	84,0 (18,2)	69,4 (15,7)	21,0	94,9 (6,2)	81,5 (5,8)	16,5	178,9 (9,0)	150,9 (8,2)	18,6
Sorting, Packaging and Palletizing (% value)	34,8 (7,6)	36,1 (8,2)	-3,4	84,0 (5,5)	78,2 (5,6)	7,4	118,8 (6,0)	114,3 (6,2)	3,9
Purification systems (% value)	10,6 (2,3)	9,5 (2,2)	11,1	7,5 (0,5)	8,4 (0,6)	-10,7	18,1 (0,9)	17,9 (1,0)	1,1
Quality and process control (% value)	3,1 (0,7)	2,6 (0,8)	21,8	5,7 (0,4)	5,7 (0,4)	0,0	8,9 (0,4)	8,3 (0,5)	7,2
Engineering (% value)	4,6 (1,0)	5,2 (1,2)	-12,6	14,8 (1,0)	7,3 (0,5)	102,0	19,3 (1,0)	12,5 (0,7)	54,4
Laboratory instruments (% value)	3,3 (0,7)	3,0 (0,7)	11,3	4,4 (0,3)	4,5 (0,3)	-1,1	7,7 (0,4)	7,5 (0,4)	2,7
Total	460,8 (100)	441,7 (100)	4,3	1.522,0 (100)	1.394,6 (100)	9,1	1.982,8 (100)	1.836,2 (100)	8,0



Export by areas in 2015





Breakdown of exports by geographical areas

(Values in million euros)

	2015		2014		Var.% 2015/14
	Export	% value	Export	% value	
Other Asia*	277,9	18,3	249,1	17,9	29,3%
European Union	277,3	18,2	226,2	16,2	22,6%
Africa	203,8	13,4	214,9	15,4	22,8%
Middle East**	186,6	12,3	172,1	12,3	-25,1%
South America	185,9	12,2	166,1	11,9	8,0%
North America***	160,9	10,6	166,0	11,9	92,8%
Eastern Europa	152,9	10,0	115,9	8,3	-7,9%
East Asia****	75,5	5,0	83,4	6,0	-34,9%
Oceania	1,2	0,1	0,9	0,1	31,9%
TOTAL	1.522,0	100	1.394,6	100	9,1%

(*) **OTHERS ASIA:** Afghanistan, Bangladesh, Bhutan, Myanmar, Brunei, Burkina Faso, Cambodia, Korea, Philippines, Japan, India, Indonesia, Laos, Malaysia, Mongolia, Nepal, Pakistan, Singapore, Sri Lanka, Thailand, Vietnam.

(**) **MIDDLE EAST:** Saudi Arabia, Bahrain, UAE, Jordan, Iraq, Iran, Israel, Kuwait, Lebanon, Qatar, Oman, Syria, Turkey, Yemen.

(***) **NORTH AMERICA:** NAFTA area

(****) **EAST ASIA:** China, Hong Kong, Taiwan



Exports and export propensity of each size class for a single geographic area in 2015

(Values in million Euros)

	1st class (0 - 2,5 mil.)	2nd class (2,5 - 5 mil.)	3rd class (5 - 10 mil.)	4th class (oltre 10 mil.)	TOTAL
European Union	19.053	7.941	26.627	223.713	277.333
<i>Export propensity</i>	22,8%	17,4%	30,5%	17,1%	18,2%
Eastern Europe	7.768	5.017	6.919	133.219	152.922
<i>Export propensity</i>	9,3%	11,0%	7,9%	10,2%	10,0%
North America	11.968	5.833	9.395	133.673	160.868
<i>Export propensity</i>	14,3%	12,8%	10,8%	10,2%	10,6%
South America	8.980	4.083	9.291	163.568	185.922
<i>Export propensity</i>	10,8%	9,0%	10,6%	12,5%	12,2%
Middle East	8.746	9.514	20.411	147.939	186.609
<i>Export propensity</i>	10,5%	20,9%	23,4%	11,3%	12,3%
East Asia	228	880	1.061	73.295	75.463
<i>Export propensity</i>	0,3%	1,9%	1,2%	5,6%	5,0%
Other Asia	10.767	4.805	7.073	255.282	277.927
<i>Export propensity</i>	12,9%	10,5%	8,1%	19,6%	18,3%
Africa	15.983	7.441	6.450	173.931	203.806
<i>Export propensity</i>	19,1%	16,3%	7,4%	13,3%	13,4%
Oceania	20	53	112	1.007	1.193
<i>Export propensity</i>	0,0%	0,1%	0,1%	0,08%	0,1%
Total	83.512	45.566	87.340	1.305.626	1.522.044



**The next edition of the survey will be available
in June 2017**