

NEWSLETTER



Italian Technology Center India



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ABOUT US

ITALIAN TECHNOLOGY CENTER (ITC) is a network of eight Italian capital goods manufacturing companies. This innovative project is promoted by UCIMU-SISTEMI PER PRODURRE (the Italian machine tools, robots and automation manufacturers' Association), AMAPLAST (the Italian plastics and rubber machinery and moulds manufacturers' Association) and ACIMGA (the Italian manufacturers' association of machinery for the graphic, converting and paper industry). The ITC network facilitates a flexible collaboration among leading Italian machinery manufacturers in order to share resources and knowledge with the common aim of strengthening their presence in the Indian market.

Indian companies consider ITC as their first point of reference in India and get an immediate answer/feedback to their queries from the respective Italian companies. Fresh enquiries and technical solutions are also discussed and properly followed-up with the member companies.

The enquiries for other machines/technologies will also be entertained.

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The above office will be presided by Dr. Giancarlo Losma (Immediate Past President of UCIMU - Italian Machine Tool Manufacturers Association) through its Indian SPV (Rare Tech Projects Pvt. Ltd. - Mr. Sandeep Chadha (Director); www.raretech.org).



The Indian “subcontinent”: the import of printing and converting machines

One billion and 400 million euros. This is the value of imports of printing and paper converting machines to India in 2017. A figure that places the Asian country in ninth place in the world ranking of importers and that seems destined to grow: for the next three years a growth rate of 6.5% a year is expected, which would put the volume of imports in 2021 to just under one billion and 800 million euro. An expanding market, in which Italy has for a long time become one of the major global players. It is being driven by two sectors: that of printing machines, for over 900 million euro, and that of converting machines, for more than 300 million euro. These are flanked by the paper converting machine, bookbinding and mould making sectors, which in 2017 reached a volume of between 40 and 67 million euro each, equal to about a tenth of the total.

Italy is growing in the printing press segment

In terms of Indian imports, Italy plays a role that is anything but marginal: last year it provided more than 70 million euros of printing presses (with a market share of 7.5%) and for the next three years this figure is expected to grow at a rate of almost ten points per year (+ 9.9%, +30 million euros). In any case, these are percentages that are lower than in previous years: from 2001 to 2008, the year of the global economic crisis, Italian exports in this sector to India grew by about a quarter every year (+24.6). From the following year and until 2017, the rate of expansion contracted, being reduced to 11 percentage points. To date, Italy is India’s fifth largest supplier of printing presses and, according to estimates, in 2021 the country should be able to overtake the United States and gain the fourth position in the global ranking (with a 8.2% market share), behind Japan, Germany and China. Japan is confirmed as the largest exporter of the sector (269 million euros in 2017, a figure that should grow by more than fifty million euros by 2021), in particular in low price segments: it accounts for almost 30% of the market, though its figure should drop in the next three years. The shares of Germany, China and the United States are also down: a figure that, however, just like for Japan, should not translate into a reduction in turnover. Summing up, in 2021 the value of imports of printing presses in India should break through the billion-dollar limit (thanks to an annual growth rate of 7.4% from 2017, the highest among those considered), allowing Italy to increase the weight of its exports.

The role of the Belpaese in Indian converting

The other driving sector is that of converting machines: India is the eighth importer in the world (311.3 million euros in 2017). A figure reached with growth rates of over one fifth of the annual turnover between 2011 and 2008, that plunged in the subsequent nine years (+ 8.7%) and that are expected to contract further up to 2021 (+ 5%). Imports from Italy (which in 2017 make up 5.8% of the Indian market, for over 18 million euros) have undergone the same trend: heady growth up to 2008 (+ 27.6% per year) and a fierce slowdown until 2017 (+ 4.6% per year). But for the next three years Italian exports should manage to carve out some more space, with annual rates of increase of 9%: the turnover is expected to reach 25 and a half million euros. Italy is (and at least for the next three years should remain) the third largest exporter of converting machines to India. Germany remains the leading exporting country, China is the main competitor in the lowcost segments, while Italy manages to position itself well thanks to its prices and differentiation strategies. Lastly, between 2018 and 2021 estimates for Indian import of paper converting, bookbinding and mould preparation machines are positive (respectively + 5.3%, + 3.3% and + 4% per year starting from 2017): a growing demand to which Italy risks not being able to respond, with an expected annual decrease in the turnover of paper converting machines of 4.5%, limited to just under half a percentage point for the mould preparation sector. On the other hand, the exports of bookbinding machines show growth (+ 3.7% a year).

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Acimga is the association of Italian manufacturers of machinery for the graphic, paper and converting industry



A YEAR OF CONSOLIDATION

for Italian manufacturers of plastics and rubber processing machinery

Amaplast (Italian trade association, member of CONFINDUSTRIA, bringing together about 170 manufacturers of plastics and rubber processing machinery, equipment and moulds), through its Statistical Studies Center, has completed its year-end balance sheet for 2018, incorporating foreign trade data from ISTAT (Italian Institute of Statistics).

Italian market of machinery, equipment and moulds for plastics and rubber (million euros)

	2017	2018	Δ% 2018/2017
production	4,670	4,700	0.6
exports	3,310	3,260	-1.5
imports	970	1,000	3.1
domestic market	2,330	2,440	4.7
trade balance	2,340	2,260	-3.4

After a record-setting 2017 - with double-digit growth in all indicators - the year end results for 2018 continue the positive trend.

While at somewhat more modest levels, production has continued to show growth after the all-time record set the previous year, while exports - which have always been the powerhouse for the sector - show only a slight contraction.

Imports and the domestic market held their ground, the latter probably reaping the last benefits of the investment support measures implemented in the previous Stability Law. It was not by chance that many Italian manufacturers witnessed another increase in their order books in the second half of 2018.

At +3.6%, the increase in revenues for Amaplast member companies (the mainstay of the sector) is greater than the average for the entire sector.

“On the whole, we can say we are happy with the results from the previous year,” stated Amaplast President Alessandro Grassi. “We consolidated our potential and our global position as leader in the provision of advanced technology, now fully within an Industry 4.0 vision.”

Grassi continued, “2018 may turn out to be a transition year. Beyond the normal realm of economic cycles, which leads us to expect an inversion of trend in 2019 after eight years of positive growth, companies are beginning to show signs of concern regarding the effects of the new governmental budget policies and the

general trend in the economy. This is in response both to the reworking of tax incentives and to international upheavals such as Brexit and the United States–China trade war.”

The latest year-end Amaplast member survey shows somewhat less optimism than in the previous survey or perhaps a certain reluctance to go out on a limb, depending on how you look at it - regarding the trend in orders and revenues in the current half-year: fewer members expect an increase (or decrease) while the proportion of those foreseeing stability has increased.

As regards exports, a geographical analysis of destination markets shows stagnation in Europe, historically the main market for Italian manufacturers. The EU markets have lost a small amount of ground to the rest of Europe due to greater sales to various countries - however, this excludes Russia (an important destination), where sales have continued to slip.

In the Americas, the NAFTA countries have performed well, especially Mexico, while South America has lost ground, mainly due to a lacklustre trend in the two principal markets, Brazil and Argentina.

Sales to Asian countries have not been stellar. The Far East has been characterised by modest growth (although the remarkable growth in India, +25% on 2017, was not sufficient to counter-balance the negative trend in China) while the Middle East has shown a sudden slump (all main markets have shrunk, Saudi Arabia and Iran first and foremost).

Africa has shown positive overall performance, but given the great diversity, we must at least distinguish between Mediterranean Africa (with a significant increase in sales especially to Morocco) and the Sub-Saharan countries, which as a whole have contracted significantly, as is the case for South Africa.

**Destination areas
of the Italian plastics and rubber machinery, equipment and moulds exports (%)**

	2017	2018
Europe (UE)	60.7 (51,7)	60.1 (50,4)
North America/NAFTA	13.7	15.1
Asia/Oceania	15.1	14.5
Africa	4.9	5.4
Central/South America	5.6	4.9

Top ten destination countries of the Italian plastics and rubber machinery, equipment and moulds exports (000 euro)

countries	2017	% out of the total	countries	2018	% out of the total	Δ % 18/17
Germany	481,441	14.5	Germany	470,747	14.5	-2.2
United States	276,034	8.3	United States	293,792	9.0	6.4
France	159,624	4.8	France	163,558	5.0	2.5
Mexico	142,688	4.3	Mexico	159,250	4.9	11.6
Spain	148,125	4.5	Spain	153,707	4.7	3.8
Poland	158,893	4.8	Poland	152,847	4.7	-3.8
United Kingdom	119,370	3.6	United Kingdom	121,659	3.7	1.9
China	134,191	4.1	China	116,719	3.6	-13.0
Czech Rep.	126,717	3.8	Czech Rep.	108,228	3.3	-14.6
Turkey	89,497	2.7	Turkey	92,964	2.9	3.9
total "top 10"	1,836,580	55.5	total "top 10"	1,833,471	56.3	-0.2
other countries	1,472,743	44.5	other countries	1,424,059	43.7	-3.3
world	3,309,323	100.0	world	3,257,530	100.0	-1.6

As regards the composition of exports, core machinery fared better on the average (with the exclusion of plants for foamed products) while auxiliaries and moulds recorded a more negative trend.

Amaplast has organised a number of initiatives for the coming months to promote the Italian plastics and rubber processing industry. As regards tradeshows, after the announcement of the dates for PLAST (Milan, 4–7 May 2021, again in conjunction with The Innovation Alliance), the association assisted its members in major exhibitions, coordinating the national collectives at:

- Plastico Brasil (Sao Paulo, March 25-29)
- Plastimagen (Mexico City, April 2-5). To provide further support for the Made in Italy in a market that has provided very good results for Italian manufacturers in recent years, Amaplast has organised a touring technology seminar (Monterrey, Puebla, Mexico City) on applying the “Industry 4.0” paradigm in an injection-moulding plant and is now preparing for Chinaplas (Guangzhou, May 21-24).

Furthermore, Amaplast had an information stand at PlastPrintPack in Nigeria (Lagos, March 26-28) and in Ethiopia (Addis Abeba, May 9-11). The next information booth will be at Plastpol (Kielce, May 28-31).

In parallel, the association and companies have already begun to focus on the main international event for the sector, K in Düsseldorf (October 16-23), which will witness the presence of nearly 400 Italian exhibitors, including over 300 machinery and equipment manufacturers. The Italian presence will be second only to that of the host country.

www.amaplast.org

**MACHINE TOOL ORDERS / DECREASE IN THE FIRST QUARTER OF 2019 (-8.5%)
(-8.2%) FOREIGN ORDERS. (-9.8%) DOMESTIC ORDERS.**

In the first quarter of 2019, the UCIMU index of machine tool orders showed an 8.5% decrease compared with the same period of the previous year. The absolute value of the index was 127.7 (base 100 in 2015). The overall outcome was due to the reduction registered in the collection of **orders, both in the domestic and in the foreign markets.**

In particular, foreign orders highlighted an 8.2% drop versus the period January-March 2018. The absolute value of the index stood at 124.3.

Even on the domestic front, the Italian machine tool manufacturers registered a downturn in the order collection, down by 9.8%, compared with the first quarter of 2018. The absolute value of the index was 129.1.

Massimo Carboniero, President of UCIMU-SISTEMI PER PRODURRE, stated: “The outcome of the first quarter leads to a careful consideration, because now, in addition to the evident, reduced order collection in the domestic market, started in the first quarter of 2018, there is also a decrease in the orders collected abroad”.

“With reference to the domestic market, the order downturn is not surprising after the exploit in 2017. We expected such reduction and, by observing the results of 2018 and of this first part of 2019, we can affirm that the values are back to the typical levels of the Italian market”.

“This said, however we should consider that the manufacturing industry in our country still needs to invest in new production machinery and technologies. Therefore, it is necessary that the Government authorities confirm the technicalities concerning the reinstatement of Super-Depreciation, as presented in the Growth Decree”.

“Actually, for the SMEs, Super-Depreciation represents the simplest instrument to foster the replacement and upgrade of industrial machinery. For this reason, it matches well with Hyper-Depreciation, which, on the other hand, supports and encourages the spread of innovation with regard to the digital aspect”.

“Some years ago, the Italian manufacturing industry, as well as the whole country, started a progressive process of renewal and transformation, aimed at improving the competitiveness of Made in Italy product offering. It would be risky to interrupt this path halfway, also and mostly considering the employment situation”.

“Italy needs to strengthen and increase the value of its manufacturing production, safeguarding its enterprises, its know-how and employment. To do this, we need tools that may incentivise investments in technology. Only in this way, by adding innovation to innovation, we will strengthen our leadership in those fields that are often “niche sectors”, where our product offering is significantly preferred to that of our competitors”.

“Abroad, the data collection regarding our index – added the president of UCIMU-SISTEMI PER PRODURRE – shows a slowdown. The atmosphere of political instability, the concurrence with the European Elections, the stagnation of some markets, such as Germany, and of some sectors of destination that are particularly relevant for Italian machine tools, such as the automotive, as well as the protectionist closure of some important markets, make the activity of Italian manufacturers abroad certainly less easy”.

“For this reason, we ask the Government authorities to consider an increase in tax incentives for the Italian enterprises that take part in leading sector exhibitions held in non-EU countries. Actually, the participation in trade shows, especially in far-way countries, represents the best marketing tool for a SME. Indeed, over 50 Italian companies exhibited their technologies at the most important exhibition organised in China that took place in the middle of April. Their goal was to take advantage of the demand of local users and of neighbouring countries, which is certainly among the most dynamic ones in the international scenario”.

“But all this is not enough – concluded President **Carboniero** –. Therefore, within the internationalisation activity of 2019, UCIMU, together with the Ministry of Economic Development, Embassies, ICE-Italian Trade Agency and the national sector associations, organised a series of bilateral forums in Russia, India and China, conceived to encourage the dialogue between the countries involved in each forum and concerning their respective economic-political-institutional country system and their industrial systems”.

Cinisello Balsamo, 24 April 2019

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3-RUNNER SYSTEM WITH ENHANCED CAPACITY

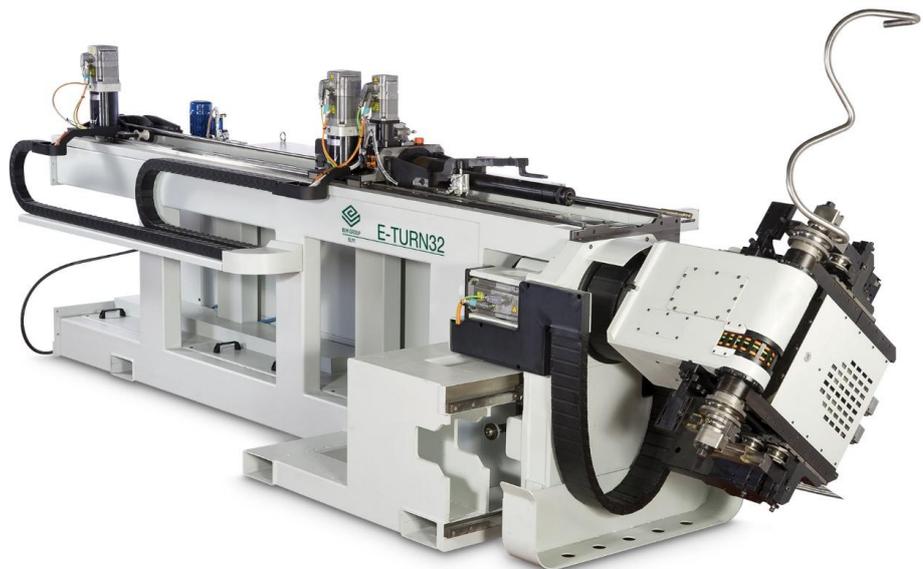
BLM GROUP's 3-RUNNER system integrates multiple processes in one. It takes the tube from a bobbin, straightens it, end-forms it and cuts it to a pre-programmed length delivering it to the successive process – bending, or assembly. Recently a special enhanced capacity version of 3-RUNNER was developed and delivered as part of a flexible manufacturing cell to an overseas Customer.

The standard 3-RUNNER can process Copper and Aluminum tubes up to 25.4 mm diameter. To satisfy the requirement of this Customer a special version



capable of processing tubes up to 35 mm diameter was developed. It has been integrated into a flexible manufacturing cell consisting of an automatic handling system to unload the parts from the 3-RUNNER and load them on to the E-TURN32 bending machine. The E-TURN32 is an All-Electric CNC tube bending machine capable of in-process RHS and LHS bending. The E-TURN32 not only bent the part but also punched a reference dent that would help to correctly orient the tube during the successive assembly.

The bent parts are unloaded onto a conveyor which would take it to the downstream manufacturing process.



For further details contact ITC or vinayak.joshi@blmgroup.it



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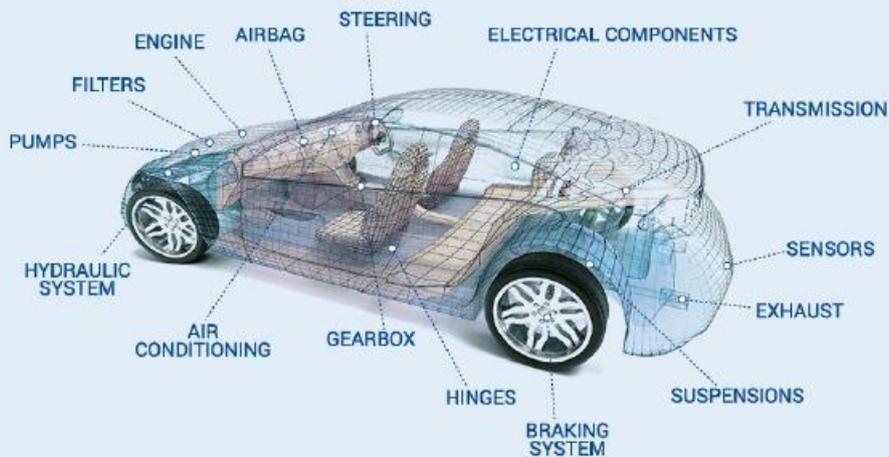
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The month of April 2019 has seen FIMAT achieving some new important goals:

1. FIMAT is now ISO 9001:2015 certified. Following the aim of constant improvement and in order to grant always the highest quality for her customers, FIMAT has successfully undergone the process for achieving the ISO 9001 certification.



2. The first Tripod Grinding Machine ST-3 will go to the PSA group in CAEN, France. FIMAT has already supplied other grinding machines for CV Joint Cages to the important French group



Figure 1 - Tripod Grinding Machine ST-3

that, after the very good results achieved by these machines, has decided to entrust to FIMAT the difficult process of tripod grinding.

3. Another major goal for FIMAT is the supply to Volkswagen of a new WM-TWIN machine for Cage Window Milling. FIMAT had already supplied to the German company 3

Window Grinding machines that will be joined, now, by the 22nd WM-TWIN manufactured since the release in 2014.

4. Last but not least and most important for the Indian market, FIMAT has signed an agreement with RF Machine Tools LLP. Located in Mumbai and lead by Mr. Raman Subramanian, RF Machine Tools will operate as FIMAT sales agent for the whole Indian market but also as technical support for after-sales service to Indian Customers. So for any need, Indian customers may now refer to Mr. Subramanian:

raman.subramanian@rfmachinetools.com



Figure 2 - Cage Window Milling Machine WM-TWIN

ARGOS: the “Made in India” cartridge filtration system

Losma presents its Glocal solution – a mix of Italian design and Indian technology

Losma, leader in design and installation of filtration systems for air and coolants, presents **ARGOS**, its **high efficiency cartridge filtration system** which is designed and produced in India in order to meet local market requirements and offer technologically advanced solutions at competitive costs.

The Argos series filters are designed and produced for the filtration of oil mists (emulsion as well as neat oil), vapors and smokes deriving from a variety of machining processes.

Available in 3 sizes with flow rates ranging from 3.000 to 15.000 m³/h and with increasing filtration efficiency rates to reach 99,97%, this filtration unit has purposely been conceived for the industrial sector, and its important features lie in its sturdiness, reliability and simplicity in conduction and maintenance.



Argos' different models enable to choose a solution which is always relevant to specific requirements without waste in energy caused by oversized systems or, on the contrary, for systems which are not adequately dimensioned.

Argos filtration process consists of three phases:

- Air enters into a calming chamber which can be equipped with a "Twist" pre-blasting system, which facilitates the aggregation of the finer particles by means of a forced centrifugal effect.
- Subsequently air passes through two separate and reusable filtration stages, a PVC drops separator and a metallic G3 filter.
- The next area consists of a chamber which houses the filter elements, cartridges with folds with a **high filtration surface** which withholds the finer impurities.

Argos can be equipped with the **Absolute Filter H13** (optional) to obtain a very **high filtration level, 99,97%** according to norm EN 1822. Particularly suitable for micro mists and smokes.

Argos is standard-equipped with a manometer to monitor the clogging of the filter elements. Upon request it can also be provided with a digital display to visualize the main functions and the exclusive system “LED Up”, which signals the clogging of the filter elements by means of three different colors.

Access to the filtration chamber is possible through a hinged door, the horizontal positioning of the cartridges allows quick and easy access and maintenance. Removal of the filters is simple, fast and clean because the two chambers of filtration system are separated by a panel which also serves as a support structure for the filter elements.

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New OMERÁ Mechanical Press 630 tons (soft blanking)

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Here, we present our 630 tons mechanical press with 4000x1500 movable table, able to ensure a thrust of 630 tons at 12.7 mm from the bottom dead center.



Fig. Mechanical Press 630 R2C2P8-SB-HY

- R2 = *double reduction gear*
- C2 = *composite structure*
- P8 = *plunger thrust unit*
- SB = *soft blanking*
- HY = *hydraulic clutch*

The press reaches 32 rpm. The high productivity is obtained also thanks to the slow-motion kinematics (Soft Blanking) with 400 mm stroke.

The movable table (front-rear) is equipped with a rapid die change system, thus allowing a considerable reduction in set-up times.

The process functions are controlled by state-of-the-art PLCs. The press is integrated into various data acquisition activities, which allows it to be classified as "*Industry 4.0*" product.

This press is characterized by some technical features such as a motor with closed-loop speed control that optimizes energy demands and a hydraulic clutch that guarantees reduced braking angles.

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Let's start from Origins: Uteco Flexo Range

Uteco Group, global partner in printing technologies (flexo, roto, roto-offset, digital) as well as converting ones (coating, laminating and high performance tailor-made special machines), is pleased to present in deep its flexographic range.

Investing in a **Uteco Flexographic Press** means a choice in reliability, technology, quality and innovation. The wide range of Uteco Flexographic printing machines gives a great choice between different models: Topaz, Onyx Xs, Onyx, Crystal and Diamond Hp.

These all offer the same high technological level in quality and performances, following Customer needs. (<https://www.uteco.com/eng/products/flexographic-presses/>)



Flexography, which has always been the best choice for flexible packaging especially in food, has seen a strong growth in orders compared to a reduction in print runs, a large increase in safety standards with even more automation in the printing process.

Flexography is always under development, starting from the machine manufacturers to the suppliers of materials and accessories.

Besides the quality of the printed products, Uteco innovations are taking care about the needs to maintain print consistency, increasing the printing speed and reducing unproductive times: in other words the efficiency of the printing process, never forget Sustainability and the Environment!

All Uteco flexographic printing machines are equipped by innovative technical solutions such as Touch&Go®, the Kiss&Go®, the SprintWash® and the Direct Drive Evo® of central impression Drum, on which we would like to draw your attention.

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Company Names	Details of Machineries	Companies logo
BLM SPA	Tube processing machines (CNC tube bending, end forming, sawing, laser cutting, tube and bar end machines)	 BLM GROUP
BUFFOLI TRANSFER SPA	Multi Spindle Mill- turn machines, Precision transfer machines, Flexible machining systems.	 BUFFOLI INDUSTRIES
FIMAT SRL	WM-TWIN CVJ Cage Milling Machine, ST-2 Tripod Grinding Machine and the RM Series of Spline Rolling Machines.	
LOSMA SPA	Air filtration systems and coolant filtration systems for machine tool	 WORKING CLEAN, BREATHING HEALTHY
MILLUTENSIL SRL	Die & Mould spotting presses, dies splitters for splitting, equipment for presses, coil lines, cut to length line, strip cutting line for sheet metal	
OMERA SRL	Hydraulic and Mechanical presses, Trimming and Beading machines, Semi-automatic and automatic production lines	 Since 1951
SIMEC GROUP	Rollers and sleeve mechanically engraved through a tool; rollers and sleeves laser engraved on ceramic; rollers for embossing in all its different applications; In-Line, Off-Line, In-Hole and Vertical Cleaning Machines/Systems for rollers and sleeves.	 MORE THAN ENGRAVINGS
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