

NEWSLETTER

Italian
Technology
Center

India



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ABOUT US

ITALIAN TECHNOLOGY CENTER (ITC) is a network of six 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).

Future Factory: a new edition focusing on the fast-changing industrial scenarios

The next edition in June 2021 will have a new innovative format



Print4All Conference - Future Factory in 2020 launched a new approach in the planning and organisation of international events in such a complicated scenario for all industries. Acimga's forward thinking paid off, and was rewarded with over 1300 virtual participants, which gave the association the strength to keep working on the path towards the Print4All exhibition in 2022, building new opportunities and creating important moments of discussion on the key Future Factory themes, sustainability, and industry 4.0, through international partnerships.

Even more so, this new year brings important transformations. A transformation in business models from a product-centric perspective to a human-centric perspective, in which service is the main fundamental component. A product is never sold on its own, but always combined with a high level of customization, based on the needs of each different subject. This mindset of human centrality spreads throughout the production chain: from factory employees, to the means of production, to the satisfaction of the end consumer, who takes with him not a simple product, but above all a dedicated service with added value. Communication is also key, putting a more human idea at the centre, with the enhancement of interpersonal exchanges.



These are the assumptions from which the new Future Factory 2021 edition was born: an event designed to have a high innovative and technological connotation, but in which humanism will incorporate the core of all communication and the main touchpoints: with Future Factory, the future is at human service.

An immersive, engaging, interactive and impacting experience, with *phigital* spaces designed to meet and expand the network of each participant and at the same time reach a wide international audience. The event is in line with all the previous editions since 2015 during Expo but takes a step further to be even more engaging and appealing.

“We are in a transition phase in which the world is suspended, and our industrial sector needs concrete guidelines to act with confidence - explains Andrea Briganti General Manager of Acimga and Federazione Carta e Grafica -. The changing context, in the international post-Covid scenarios, moves along four main directives: business organization, industrial production, socio-economic context, and legislation. Acimga aims to portray a tangible future through the voice and experience of important international speakers, acting as spokes figure for the demands of whole the supply chain, especially regarding the major topics at issue, sustainability, industry 4.0, but also servitisation and human resources; topics that are vertical within the sector, and at the same time embrace a different and broader economic approach. This is the reason why, in our next Future Factory edition in June 2021 we will deliver both a broad vision and focus on concrete industrial insights which can be a tool for all participants.”

Future Factory is organized by Acimga with the support of ITA – Italian Trade Agency, the Governmental agency that supports the business development of Italian companies abroad and promotes the attraction of foreign investment in Italy; the event takes place every year and acts as a tow and bridge to the Print4All fair, scheduled on 3-6 May 2022.

Acimga is the association inside Confindustria representing all printing, packaging, and converting technologies, uniting 84 companies for an industrial sector worth about 3 billion in turnover, 60% of which from exports. Italy is in the top 3 manufacturers for these machines globally (along with Germany and China) with its strengths being mechanical technologies, combined with the latest electronic technologies.

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DIFFICULT YEAR

for Italian manufacturers of plastics and rubber processing machinery

The double-digit dip in the import-export markets for the entire period January-September 2020 and the complex economic context due to the world health crisis prompt the trade association AMAPLAST to predict **a rather negative year-end result** for the Italian plastics and rubber processing machinery, equipment, and moulds industry.

ISTAT foreign trade data for the first nine months of last year, compared to the same period in 2019, show **imports and exports falling by 17% and 14% respectively**. The balance of trade, while still amply positive at over 1.3 billion euros, has shrunk by thirteen points.

While improving somewhat after the trough in May, these indicators - combined with the drop in orders among member companies, especially in the first half of the year and particularly in the domestic market - lead the AMAPLAST Statistical Studies Centre to estimate **total production for 2020 at 3.6 billion euros**, representing approximately -18% with respect to the 4.4 billion in 2019. An analogous result is expected in the consolidated year-end results for foreign trade.

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

	2019	2020*	Δ% 2020/2019
production	4,400	3,600	-18.2
exports	3,060	2,500	-18.3
imports	920	750	-18.5
domestic market	2,260	1,850	-18.1
trade balance	2,140	1,750	-18.2

An analysis of export markets by macro-area in the three quarters in question shows strengthening in Europe, especially in extra-EU markets, while Asia and North America have lost ground.

Destination areas of the Italian plastics and rubber machinery, equipment and moulds exports (% - January-September)		
	2019	2020
Europe (UE)	57.6 (49.8)	59.5 (48.9)
Asia/Oceania	16.6	15.9
North America/NAFTA	15.5	14.3
Africa	5.4	5.3
Central/South America	4.9	4.8

Naturally, these numbers are not surprising given the global economic impact of the pandemic, which does not appear likely to cease in the short term. The new wave of Covid-19 infections in the autumn and winter has incited machinery manufacturers to develop and implement **new operating modalities**: many Italian companies have successfully introduced complex remote installation and maintenance procedures, ensuring their customers **production continuity**, particularly in sectors - such as packaging and medical - that have suffered less from the crisis. Moreover, the cost savings deriving from reduced in-person technical service may be an important innovation for the future.

These new work modalities are possible thanks also to the **ongoing research and development** by the Italian manufacturers in an Industry 4.0 perspective, which makes it possible to offer interconnected machinery for increasingly sophisticated, custom-fitted production systems. Additionally, increasing computerization makes it possible to collect an enormous quantity of data that will contribute significantly to optimizing production line performance.

While the pandemic has temporarily distracted public opinion and softened negative criticism of plastics, technology suppliers have continued their research into **energy-saving solutions** for efficient processing of recycled materials within a vision of circular economy. At the same time, the enactment of the so-called “plastic tax”, which has been so worrisome for businesses in the sector, has not been abrogated but only postponed to 1 July 2021.

It is difficult to make forecasts for the new year, mainly because of the uncertainty that continues to surround the pandemic, which conditions markets and companies’ investment planning. **A rebound is likely**, once again thanks to the impulse from exports, which have always been the mainstay of the Italian plastics and rubber industry, but it is not likely that it will be of such magnitude that we will soon see figures similar to those in the pre-crisis period.

www.amaplast.org

**UCIMU-SISTEMI PER PRODURRE: AFTER THE COLLAPSE OF 2020,
THE ITALIAN MACHINE TOOL, ROBOT AND AUTOMATION INDUSTRY ENVISAGES
A RECOVERY ALREADY IN 2021.**

The pandemic that broke out almost one year ago strongly affected the results of the Italian industry of the sector, which registered double-digit decreases for all main economic indicators in 2020. However, the trend of the year 2021 should be completely different and, even if the ground lost over the last twelve months cannot be fully recovered, the forecasts are really positive.

This is in brief what was reported by **Barbara Colombo**, president of UCIMU-SISTEMI PER PRODURRE, the Italian machine tools, robots and automation systems manufacturers' association, during the usual end-of-year press conference.

As highlighted by the **preliminary year's data** processed by the Studies Dept. & Business Culture of UCIMU-SISTEMI PER PRODURRE, **in 2020, production** dropped to **4,970 million euro**, showing a **23.7% fall** compared with the previous year.

The outcome was due to **the reduction in the deliveries by Italian manufacturers on the domestic market, decreased by 28.2% to 2,090 million euro**, as well as to the **negative trend of exports, fallen by 20% to 2,880 million euro**.

Based on the ISTAT data processing by UCIMU, in the first nine months of the year (latest available survey), the export downturn of machine tools only was strong and generalised. The sales to the United States, first destination market for the *Made in Italy* products of the sector, went down to 229 million euro (-21.4%). The other main destination countries were Germany, 185 million euro (-31.2%); China, 162 million euro (-28.2%); France, 115 million euro (-34.3%) and Poland 92 million euro (-30.8%).

The health emergency had an even stronger impact on the domestic market. In 2020, machine tool, robot and automation **consumption in Italy fell by 30.3% to 3,385 million euro**, penalising both the deliveries of Italian manufacturers and imports, decreased by 33.4% to 1,295 million euro.

The significant reduction of domestic machine tool consumption determined an increase in the export/production ratio, changing from 55.3% in 2019 to 57.9% in 2020.

On the contrary, the year 2021 should have a completely different trend for the Italian machine tool, robot and automation manufacturing industry, bringing about a recovery of business activities.

According to the forecasts developed by the Studies Dept. & Business Culture of UCIMU, **production should grow to 5,795 million euro (+16.6% versus 2020), driven by the recovery of exports**, which should amount to **3,220 million euro (+11.8%), and by the increase in the deliveries of Italian manufacturers on the domestic market, which should go up to 2,575 million euro (+23.2%).**

Consumption should regain its dynamism, registering a 23.3% upturn and reaching 4,175 million euro. Imports will also start to grow, attaining 1,600 million euro, corresponding to 23.6% more than in the previous year. The export/production ratio will return to 55.6% due to the balancing of Italian manufacturers' activity between domestic and foreign markets.

Barbara Colombo, president of UCIMU-SISTEMI PER PRODURRE, commented: "What happened in 2020 has deeply affected the expectations of the Italian industry of the sector, which experienced a particularly difficult situation last spring and, starting from July, reported some feeble, positive signs of market recovery, also confirmed in the autumn months".

"We are certainly far away from coming back to the pre-emergency activity level, but the forecasts for 2021 are positive and raise hopes for the near future. The availability and gradual dissemination of vaccines will significantly contribute to the activity recovery also abroad, while facilitating a return to a normal mobility of people, necessary for the business of our enterprises that have always been engaged in foreign markets.

The movement impossibility of goods and people, as well as the almost total absence of trade fairs, have severely tested our work. However - added **Barbara Colombo** – 2021 will be the year of **EMO MILANO 2021**, which will take place in Italy again after six years and after the success of the 2015 edition. It will be hosted at fieramilano from 4 to 9 October and will actually be the first international exhibition after one year and a half. Also for this reason, we believe that EMO MILANO, which has always acted as a multiplier of machine tool demand, will have an even more boosting effect on the investments in production systems and technologies 4.0".

"Moreover, on the domestic front – continued the president of UCIMU-SISTEMI PER PRODURRE – the industry of the sector will start again to work at high pace, supported also by the incentive measures of the **Transition Plan 4.0** included in the Budget Law 2021."

"With the confirmation of the Transition Plan 4.0, the Government authorities demonstrated that they have well understood the value of this programme, also because they provided for the strengthening of the measures included in the Plan, increasing deduction rates and maximum limit

of expenditure and extending the applicability until the end of 2022. This said, the plan is certainly perfectible”.

“In particular, while appreciating the extension of the measure validity until 2022, we think that a two-year period is still too short to ensure its full efficacy. As already repeatedly mentioned, it would be necessary to transform the tax credit for investments in both traditional and interconnected/4.0 machinery into structural measures or at least extend it to five years, in order to really enable the enterprises to properly plan their investments over time”.

“With reference to the choice of the provisions at the enterprises’ disposal - continued **Barbara Colombo** –we think that tax credit is the most appropriate measure, because of its simple use and possibility of application also for the enterprises that have no profits. Nevertheless, we would have preferred that the plan could envisage a double possibility, including, besides tax credit, the already known provisions of Super- and Hyper-Depreciation, (which guarantee a tax benefit similar to that of tax credit), so that the companies could be free to choose the most appropriate measure for their situation”.

“We are very satisfied with the decision of the Government authorities to include also the cost for trainers in the calculation of the tax credit on professional training, - as we kept asking for a long time - besides the cost for the hours that the employees spend in update activity. The cost for the teacher is undoubtedly the heaviest expense for carrying out this activity, especially for the SMEs. This measure will not only stimulate the enterprises to start professional education and training, but it will incentivise them to choose the most qualified teachers”.

“Apart from these adjustment observations - concluded **Barbara Colombo - the Transition Plan 4.0 shows a big gap that, in our opinion, must be filled as soon as possible**. To be a real plan of industrial policy, it should consider not only the aspects regarding process and product innovation. Indeed, there is another issue, which is also important for the development of the manufacturing industry in Italy and the maintenance of competitiveness in comparison with foreign competitors: **growth in size**. In this new, competitive international scenario, the strengthening of companies, also through mergers and/or takeovers, becomes a necessity that cannot be deferred. The difficulty in carrying out these operations is not only psychological, as mentioned time ago, but, on the contrary, it is also related to the value that should be paid for the surplus values resulting from mergers or takeovers. In order to incentivise these operations, the economic results of mergers and/or takeovers must be made neutral in relation to taxation”.

Cinisello Balsamo, 17 December 2020

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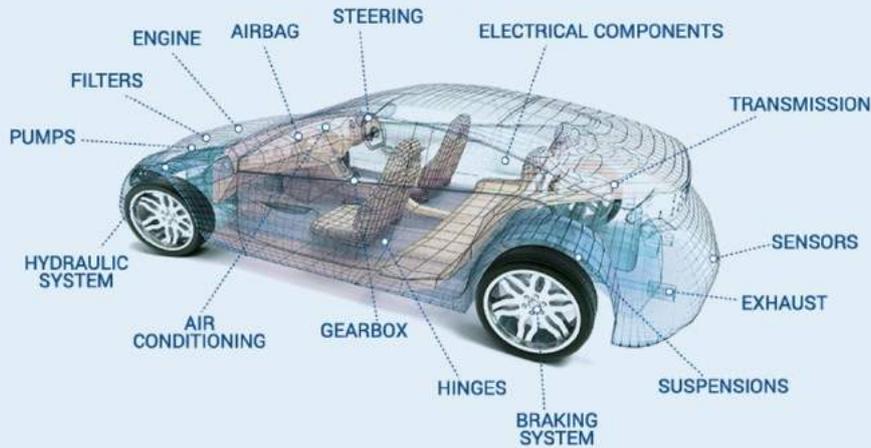
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Fig. 1 – Trimming Beading Machines mod. RA700 for gas bottles

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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)	
BUFFOLI TRANSFER SPA	Multi Spindle Mill- turn machines, Precision transfer machines, Flexible machining systems.	
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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	
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.	