



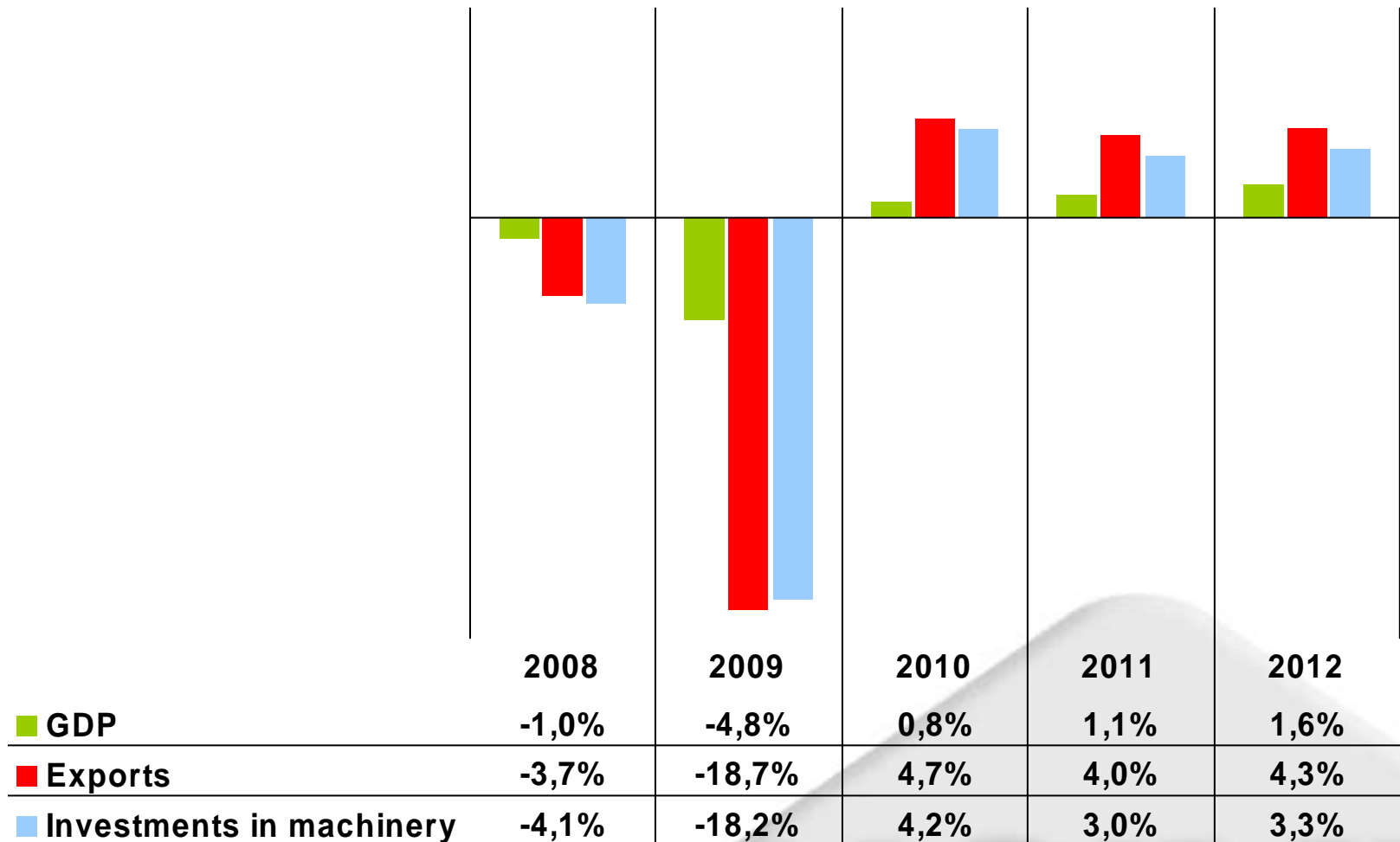
UCIMU-SISTEMI PER PRODURRE

THE MACHINERY INDUSTRY IN ITALY

Milan, 6 May 2010



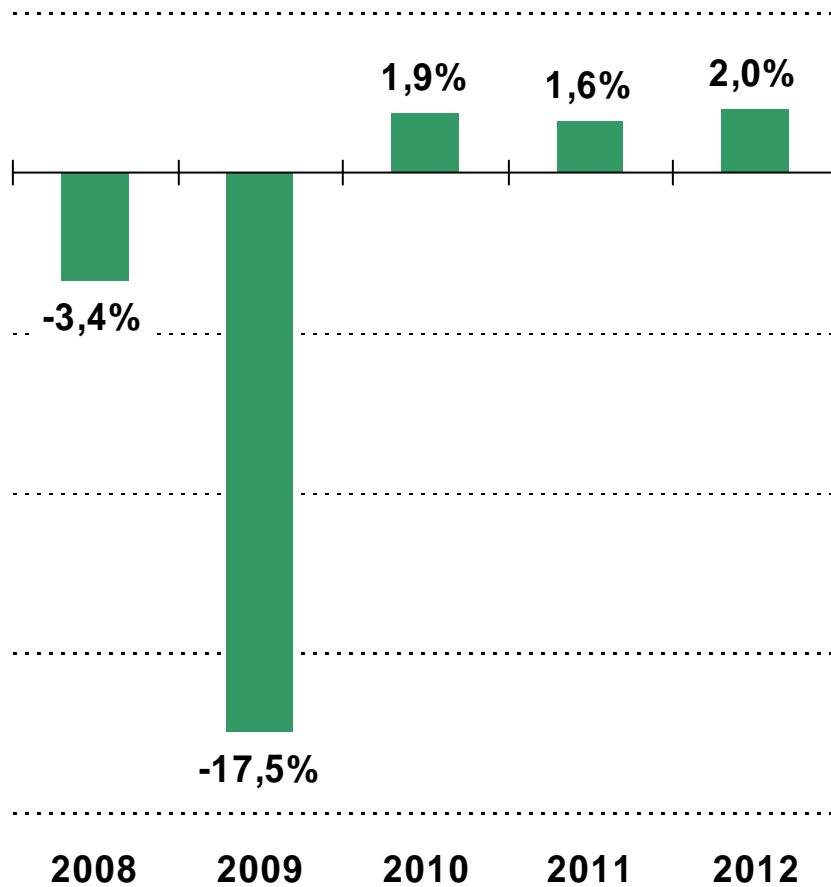
THE WEAK RECOVERY



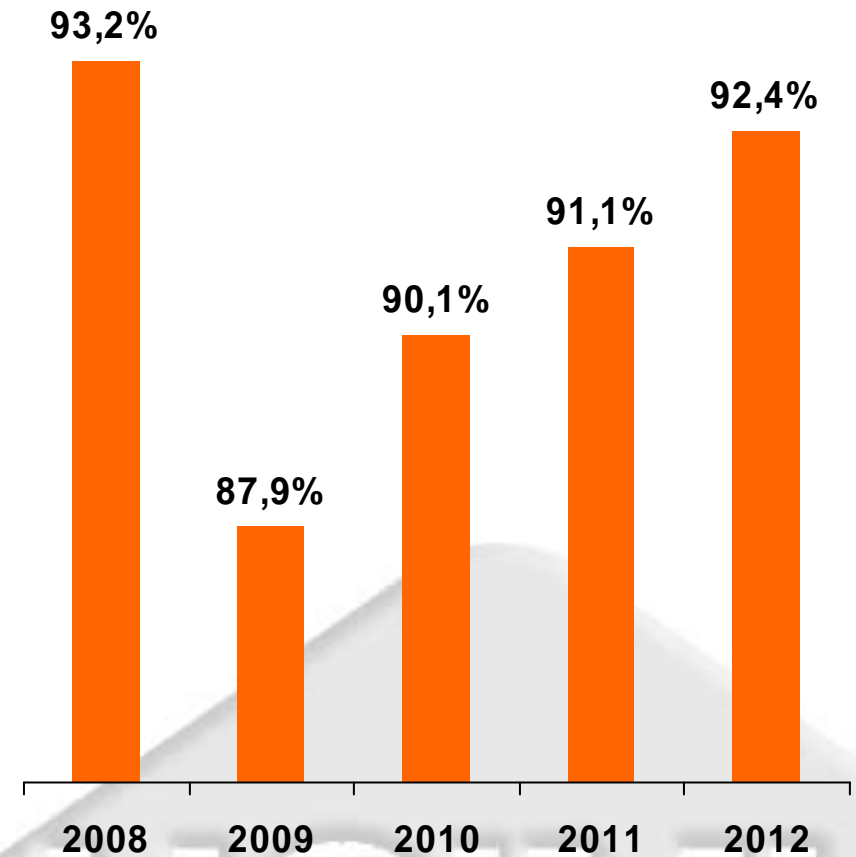
Source: Prometeia, January 2010

THE MANUFACTURING SECTOR

Industrial production



Capacity utilization



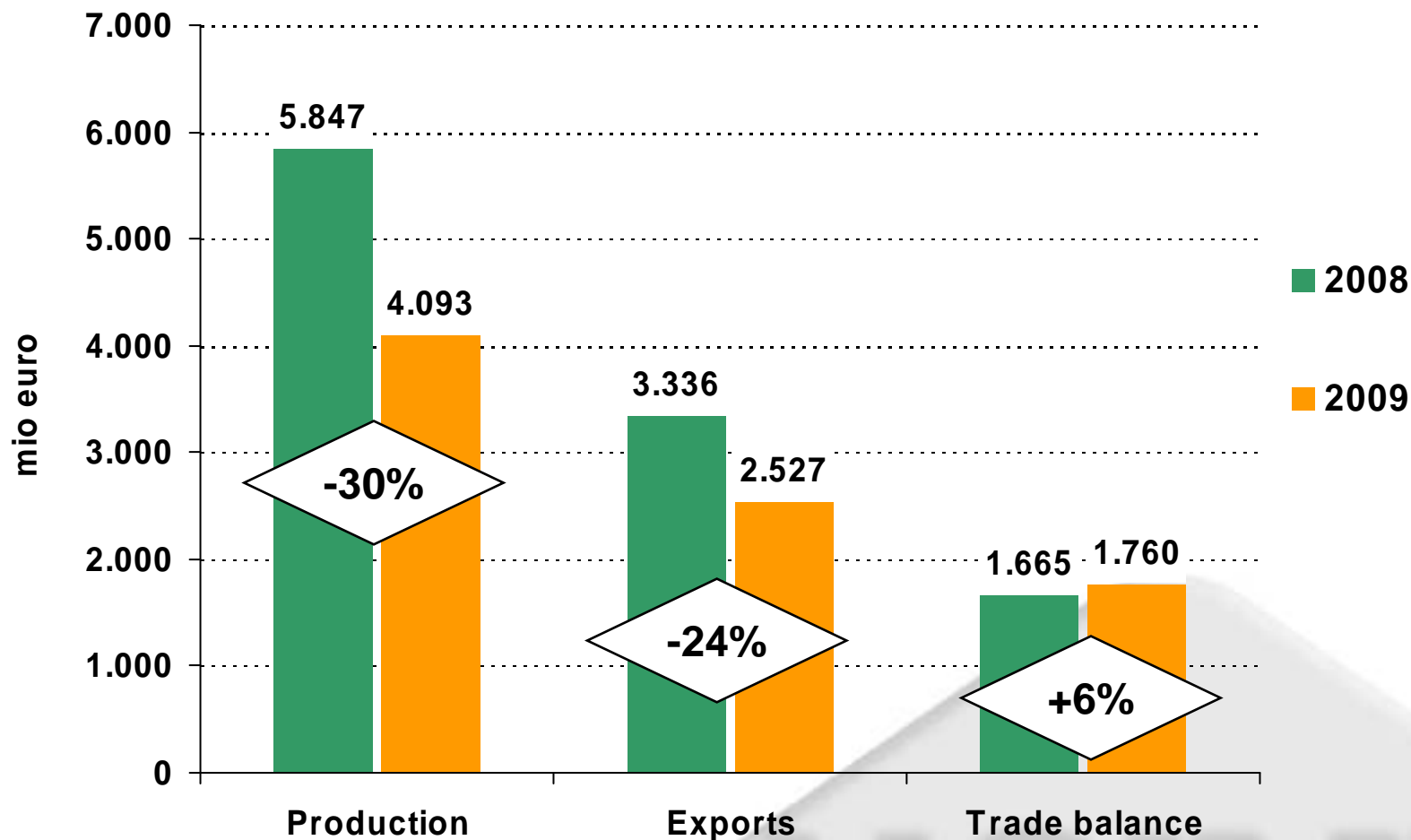
Source: Prometeia, January 2010

UCIMU – SISTEMI PER PRODURRE

- **It is the Association of Italian Manufacturers of Metalworking Machine Tools, Robots and Automation.**
- **UCIMU was established in 1945 to protect the interests of the industry and promote the growth of an entrepreneurial culture.**
- **The more than 200 member companies manufacture 70% of Italian-made products.**
- **In 2009 the Italian industry maintained third place in the world for exports and fourth for production of machine tools.**

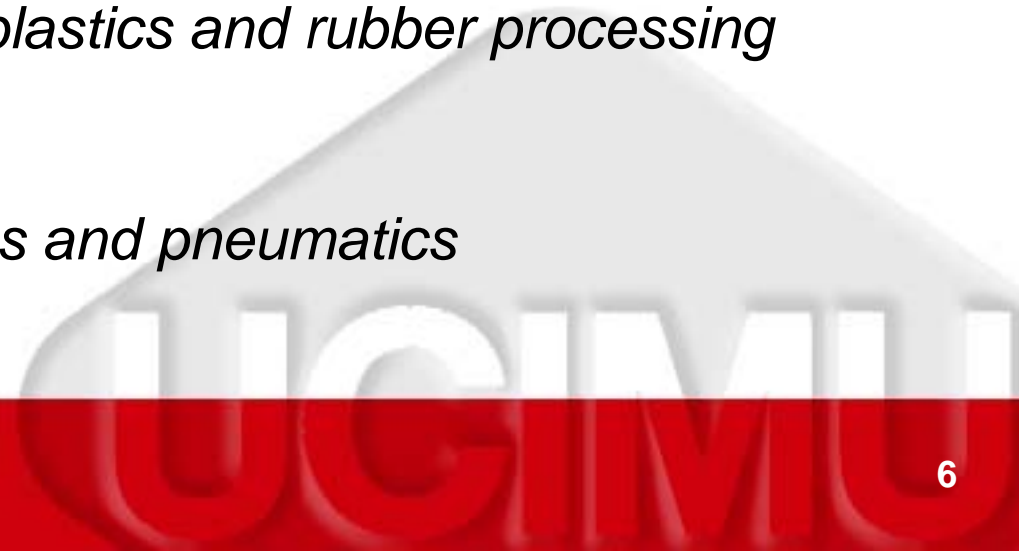


RESULTS IN 2009: THE RECESSION HITS HARD



FEDERMACCHINE: THE FEDERATION OF ITALIAN MACHINERY ASSOCIATIONS

- *ACIMAC: machinery and equipment for ceramics*
- *ACIMALL: woodworking machinery*
- *ACIMGA: machinery for the graphic, converting and paper industry*
- *ACIMIT: textile machinery*
- *ASSOCOMAPLAST: plastics and rubber processing machinery and moulds*
- *ASSOFLUID: hydraulics and pneumatics*



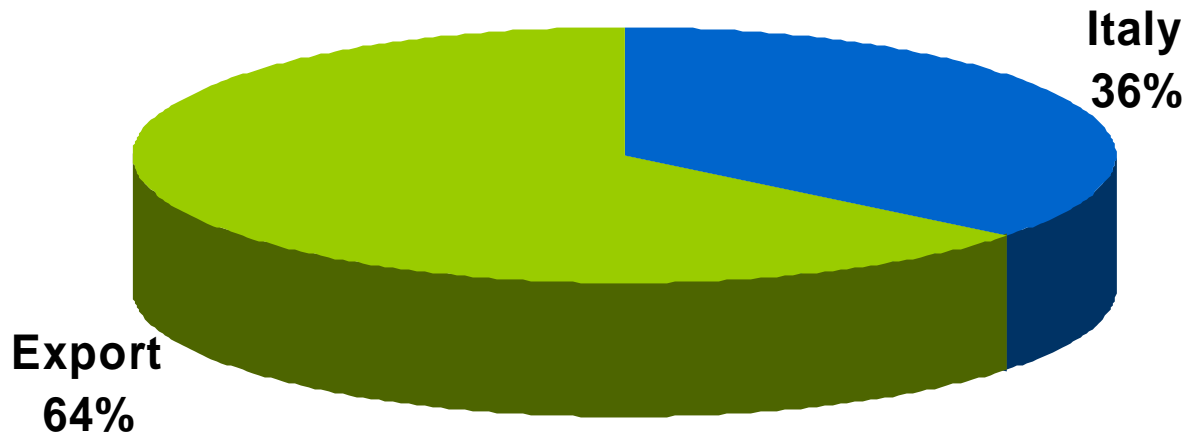
FEDERMACCHINE: THE FEDERATION OF ITALIAN MACHINERY ASSOCIATIONS

- ASSOMAC: *footwear, leathersgoods and tannery machinery*
- CONFINDUSTRIA MARMOMACCHINE: *machinery and equipment for natural stone processing*
- GIMAV: *glass processing machinery, accessories and special products*
- UCIMA: *automatic packing and packaging machinery*
- UCIMU – SISTEMI PER PRODURRE: *machine tools, robots and automation*
- UNACOMA: *agricultural machines*

THE MACHINERY INDUSTRY IN ITALY

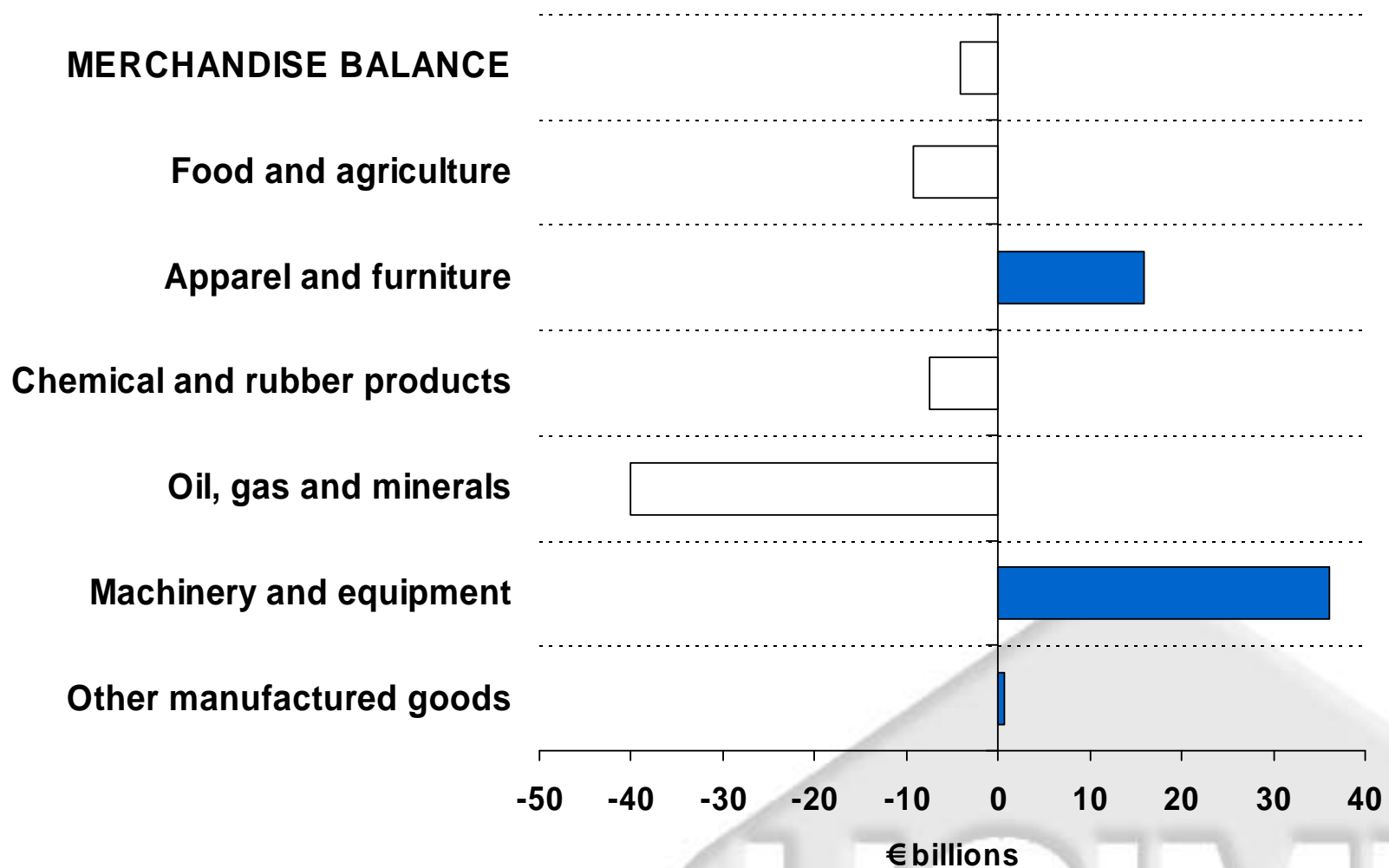
- ***Production:*** **€28.9 billions**
- ***Exports:*** **€18.6 billions**
- ***Companies:*** **about 6,600**
- ***Employment:*** **181,000 employees**

THE PROPENSITY TO EXPORT



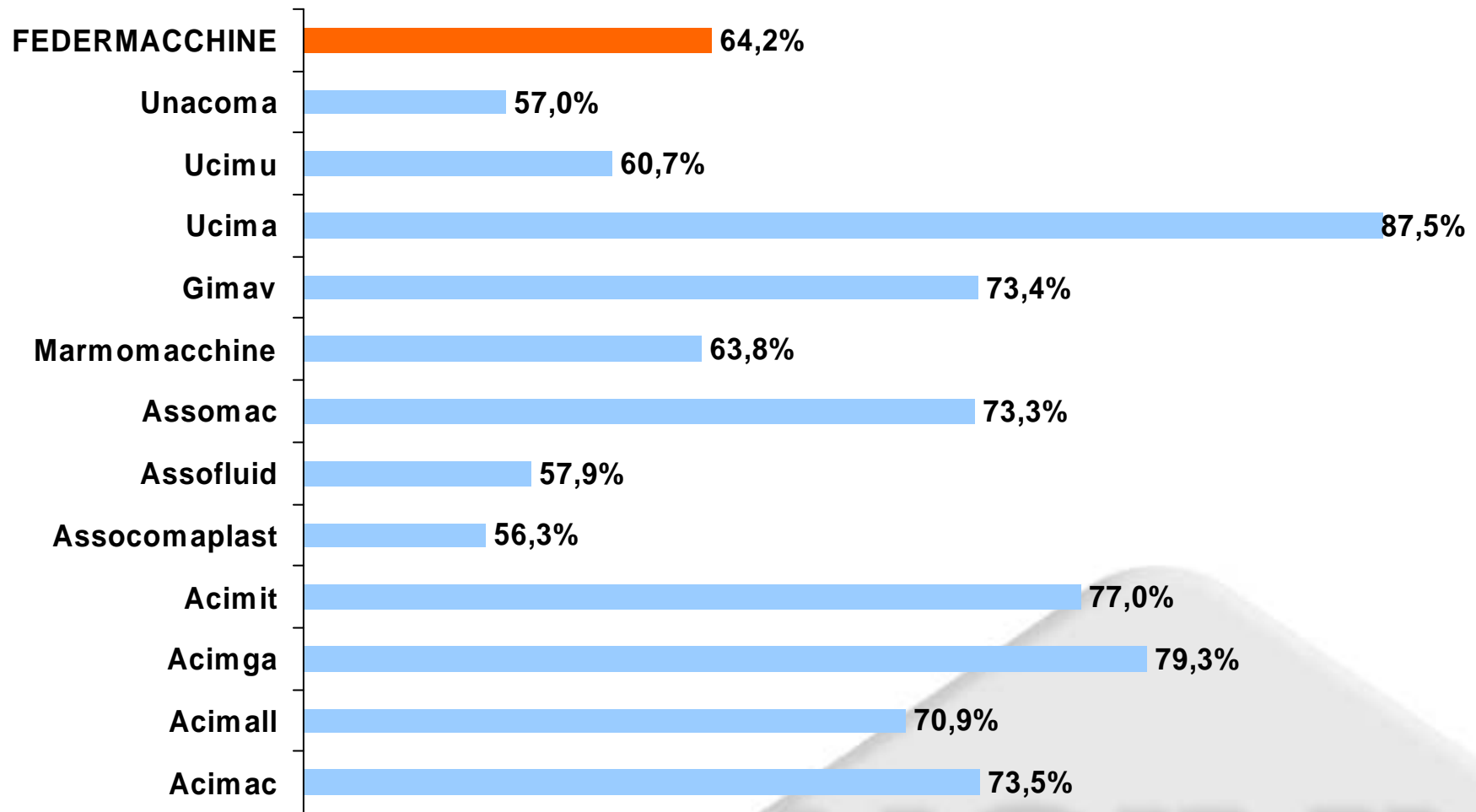
Trade balance 2009: +14.2 € billions

THE CONTRIBUTION TO MERCHANDISE TRADE

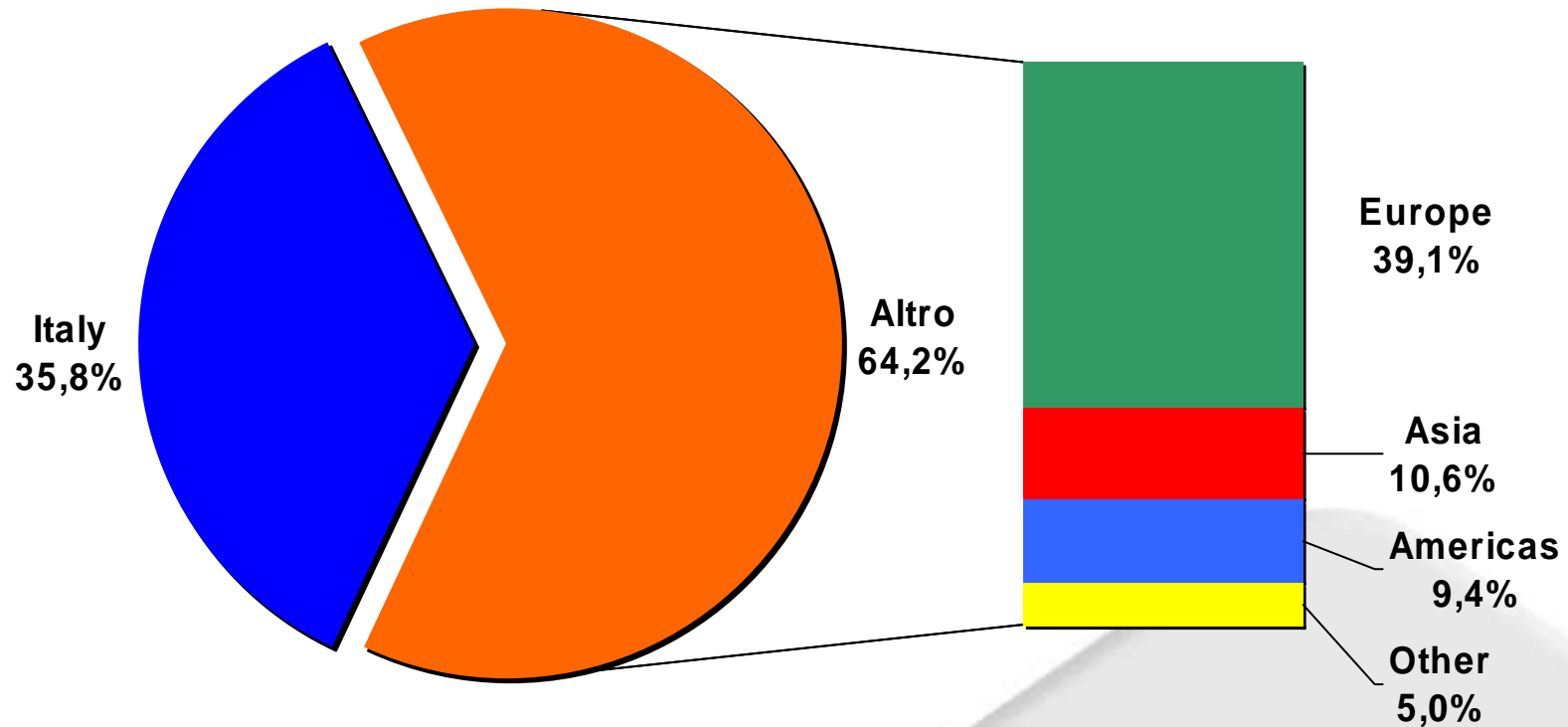


Source: elaborations on ICE data

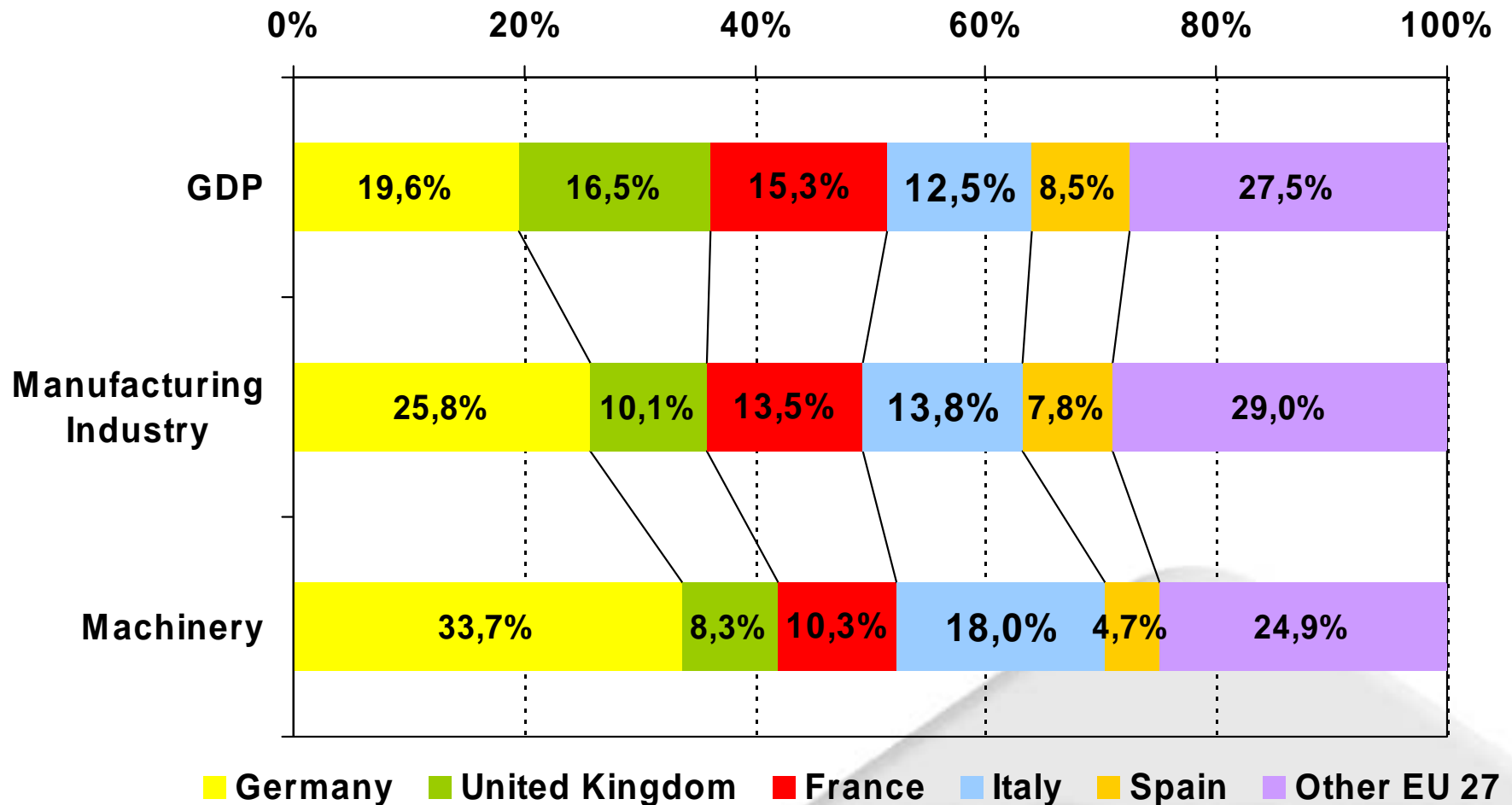
EXPORT RATIOS OF FEDERMACCHINE SECTORS



DESTINATION MARKETS

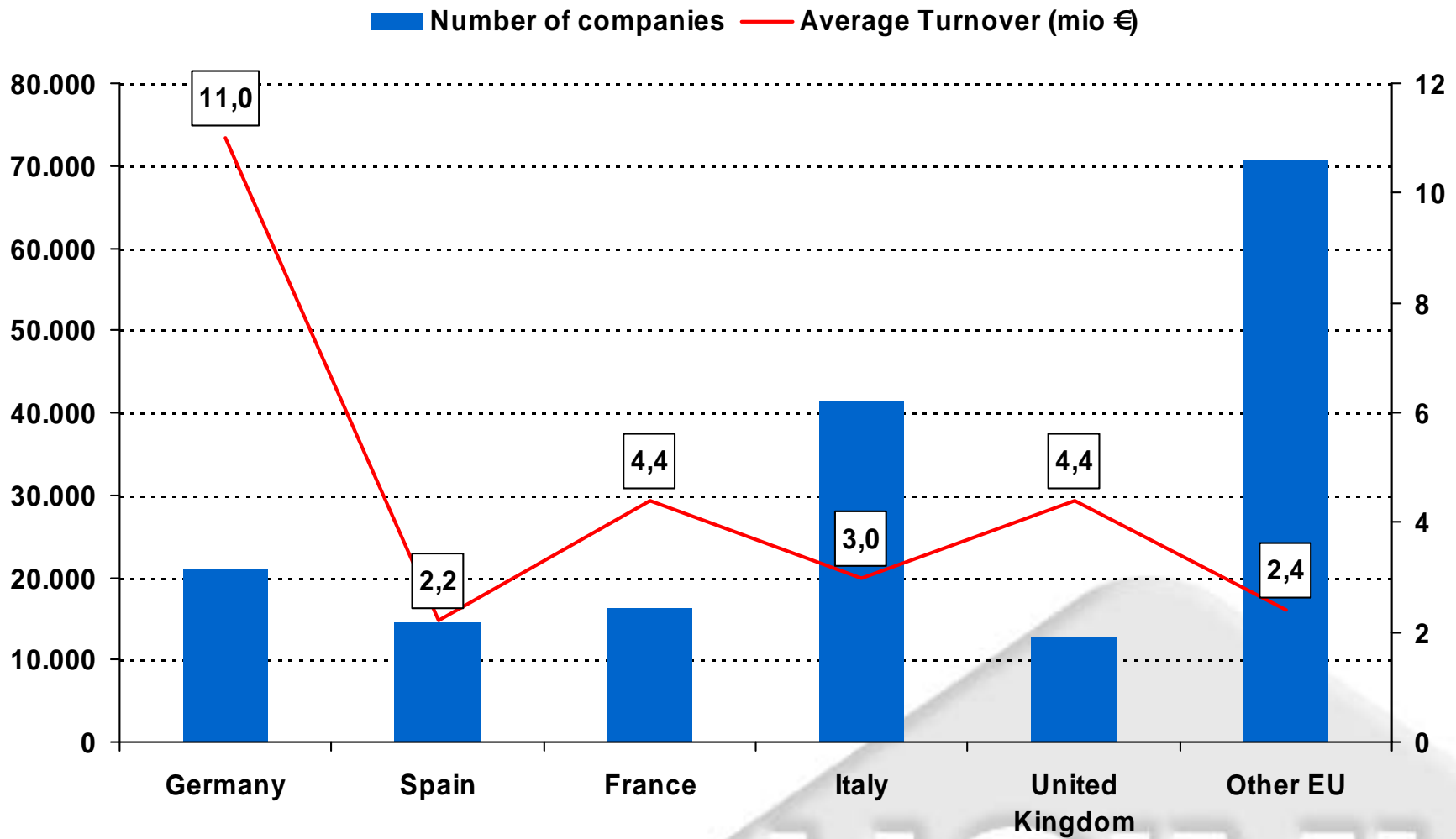


THE ITALIAN MACHINERY INDUSTRY IN EUROPE: A GIANT



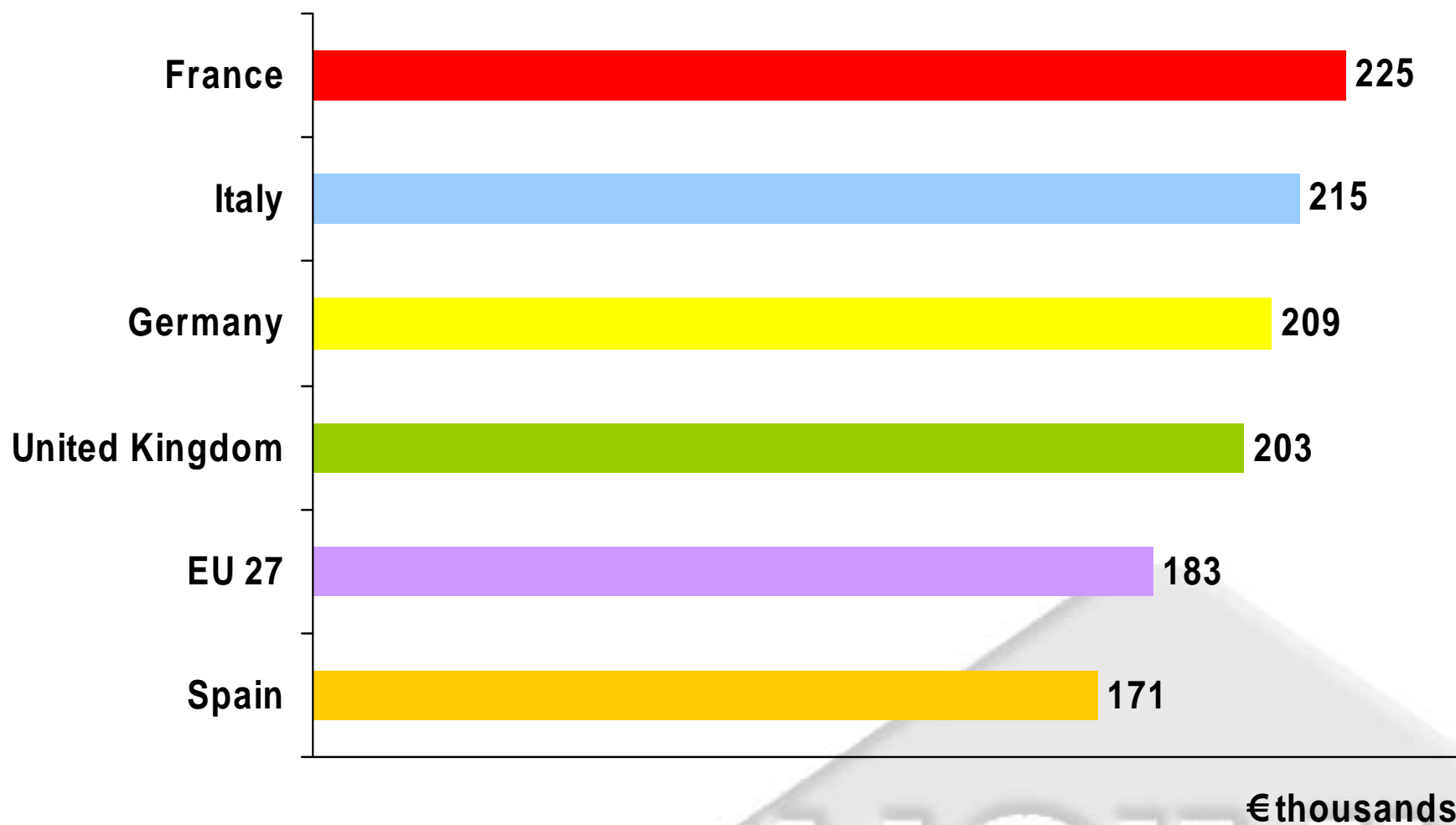
Source: elaborations on Eurostat data

... MADE OF MANY SMALL COMPANIES



Source: elaborations on Eurostat data

SMALL IS BEAUTIFUL: TURNOVER PER HEAD



Source: elaborations on Eurostat data