

SATISFACTORY BALANCE SHEET

Assocomplast (Italian trade association, member of CONFINDUSTRIA, bringing together over 160 manufacturers of plastics and rubber processing machinery, equipment and moulds), through its Statistical Studies Center, has completed its year-end balance sheet for 2016, incorporating foreign trade data from ISTAT (Italian Institute of Statistics).

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

	2015	2016	Δ% 2016/2015
production	4,150	4,230	1.9
exports	2,920	2,970	1.7
imports	755	850	12.2
domestic market	1,985	2,110	6.3
trade balance	2,165	2,120	-2.1

"In making a comparison with 2015 one immediately notes a new historical record for exports," states a satisfied Alessandro Grassi, President of Assocomplast. "They are approaching three billion euros, racking up an increase of 1.7%."

There was even greater progress in imports, exceeding 12%, the outcome of a trend that continued to increase all along the year, reaching a total of 850 million euros. "Here too," underscores Grassi, "we are looking at levels we have never seen before, confirming signs that the domestic market is regaining altitude after many – too many – years of stagnation."

Robust growth was seen in purchases of injection moulding machines (+37%, much from Germany, Austria and Japan), extrusion machines (+39%, from Austria, Belgium and Germany) and blow-moulding machines (+118%, from France and Germany).

This positive climate is also reflected in participation in the tradeshow PLAST 2018 (Milan, 29 May–1 June 2018), which had already passed the threshold of 600 exhibitors by the end of January 2017.

As regards production, in the absence of official data, Assocomplast estimates that revenues for the sector in 2016 had returned to pre-crisis levels, exceeding 4.2 billion euros.

Returning to exports, which absorb over 70% of production, sales of the following categories have been particularly significant: injection moulding machines (+18%), extruders (+5%) and thermoforming machines (+10%), just to cite some of the main types of systems for primary processing.

In terms of macro regions, an analysis of the geography of exports reveals the following:

- a decrease in share to European markets, dragged down principally by less-than-stellar sales to countries outside of the EU
- an increase of share to Asia, with Iran and Saudi Arabia ensuring sales to the Middle East, and China, India and South Korea driving those to the Far East
- overall progress in exports to North America thanks to +70% to Mexico, since as we shall see below, the U.S. market, after years of growth, did not reward Italian manufacturers last year.

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

	2015	2016
Europe (UE)	60.2 (49.7)	58.5 (49.3)
Asia/Oceania	15.6	16.7
North America/NAFTA	13.7	14.5
Central/South America	6.0	5.5
Africa	4.5	4.8

In greater detail, in the top ten destination markets, we record double-digit growth in sales of Italian technology to Mexico (leaping from eighth to third place, +71%), Poland (fourth, +13%), China (fifth, +12%) and Spain (sixth, +18%).

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

countries	2015	% out of the total	countries	2016	% out of the total	Δ % 16/15
Germany	395,459	13.6	Germany	401,950	13.5	1.6
United States	260,206	8.9	United States	230,315	7.8	-11.5
Mexico	101,415	3.5	Mexico	172,950	5.8	70.5
Poland	145,085	5.0	Poland	164,286	5.5	13.2
China	123,365	4.2	China	138,113	4.6	12.0
Spain	116,322	4.0	Spain	136,868	4.6	17.7
France	130,319	4.5	France	131,274	4.4	0.7
United Kingdom	112,031	3.8	United Kingdom	117,981	4.0	5.3
Czech Rep.	94,731	3.3	Czech Rep.	100,497	3.4	6.1
Turkey	94,416	3.2	Turkey	98,671	3.3	4.5
total "top 10"	1,573,349	54.0	total "top 10"	1,692,905	56.9	7.6
other countries	1,344,764	46.0	other countries	1,275,619	43.1	-5.1
world	2,918,113	100.0	world	2,968,524	100.0	1.7

In reference to other destinations of particular interest, we report the following dynamics:

- the German market, historically Italy's number one trading arena, maintains its value (+2% over 2015)
- -11% for the United States, where a slowdown in exports began around the middle of last year
- a 45% increase for India, now in eleventh position, which is particularly significant if we consider the complexity of this market
- a persistent negative sign for Russia, shrinking by eighteen percentage points
- and a collapse (-38%) was also recorded for Brazil, where the plastics industry has not been left unscathed by the general decline of the domestic market.

Rumania, with a share of 1,91% (valued 56.670 million euro) out of the total, ranks 14th in the 2016 Italian plastics and rubber machinery export.

The most recent survey conducted by Assocomplast among its members reveals a good trend in orders, with 43% of respondents foreseeing improvements in the current half year over July-December 2016, and a similar proportion expecting also to see an upturn in revenues.

Expectations in the industry for 2017 are thus rather positive, further buoyed by the measures to support investment in capital equipment – super-amortization, hyper-amortization, the new Sabatini law, tax deductions for R&D – implemented also as part of the National Plan Industry 4.0.

"It bears mentioning," continues Grassi, "that Italian manufacturers of plastics and rubber processing machinery, equipment and moulds are traditionally at the technological cutting edge and thus already prepared to provide their customers with advanced and innovative production systems within an "Industry 4.0" vision. In any case, this objective will represent a further stimulus for companies to increase investments in designing machinery that is increasingly high performance and competitive."

www.assocomplast.org

WINDING PIPES WITHOUT OVALIZATION



The completely automatic dual coiler TR1400, by FB Balzanelli, is designed to coil flexible PE and XPE-Al-XPE pipes and copper tubing with diameters ranging from 10 to 50 mm. Each unit is automatically adjusted thanks to sophisticated software that makes it possible to program the management of different production lots and achieve precision pipe cutting on point zero. The technology developed by FB Balzanelli also reduces pipe ovalization during winding.

TR is the first series of automatic coilers developed in house by FB Balzanelli and it incorporates all the know-how acquired by the manufacturer in this field.

Famous as one the first on the market to feature an automatic coiler configuration with two opposing reels, the TR series of coilers is distinctive for the various configurations and customization options it offers processors.

Equipped with brushless motors, planetary gear units and a fourth-generation fast strapper, the TR series is aimed at customers who are particularly interested in automated solutions and need high outputs without compromising on coil quality. Including over 650 models, The TR series is now one of the best and most advanced products of its kind available on the market.

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BANDERA ENDS 2016 WITH A HAT TRICK



The bubble film extrusion lines produced by Bandera are currently doing well. In a press release, the company has reported an increase in orders for these lines, especially the kind destined to be used in the production of agricultural film, of which Bandera is now one of the world's leading manufacturers. The agricultural applications market is currently interested in systems able to produce film with up to 7 layers, in widths of up to 18 metres. Bandera ended 2016 with three orders for innovative systems destined for this particular sector.

According to the news released by the company, the three lines in question have been ordered by processors in Mexico, Italy and the UK, which have chosen Bandera for its high process performance and reliability and excellent after sales service. The three lines, equipped with heads designed to produce bubbles with diameters of over 2,500 mm, will be able to reach outputs of over 2,000 kg/hour and can be used to produce 3-, 5- or 7-layer films with thicknesses ranging from 30 to 220 micron and widths of up to 24 metres. The lines can be supplied with semi-automatic or fully automatic winders.

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PASSAGE TO INDIA



During the three days of PU Tech 2017 (held from March 8 to 10 at the India Expo Centre, Greater Noida), the Italian manufacturer of polyurethane foam machinery and equipment SAIP exhibited its technologies developed for various application sectors. First of all, the high pressure mixing heads of the third generation, covered by international patent, allowing the mixing of a third blowing agent in any kind of foaming unit. This technical solution makes it possible to introduce the third component directly in the mixing head for high quality mixing and homogeneity to the advantage of the machine and material performance.

Among the other innovations from SAIP:

- Contitech and Ditech, continuous and discontinuous production lines for the manufacturing of PU (or rockwool) insulated sandwich panels for roof, wall, covering, civil and industrial doors, air conditioning ducts
- Reftech foaming lines
- the new DRY system
- foaming moulds and masks for the insulation of industrial and domestic cabinets and doors.

SAIP patented a technology which allows the use of the same equipment for the production of different kind of cabinet models, reducing time and energy consumption.

Finally, SAIP displayed a range of solutions based on pentane and other hydrocarbons in continuous and discontinuous foaming processes, as well as high and low-pressure foam dosing units for various applications in the building, automotive, interior design, medical and sport industries.

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