



UCIMA

Italian Packaging Machinery Manufacturers Association

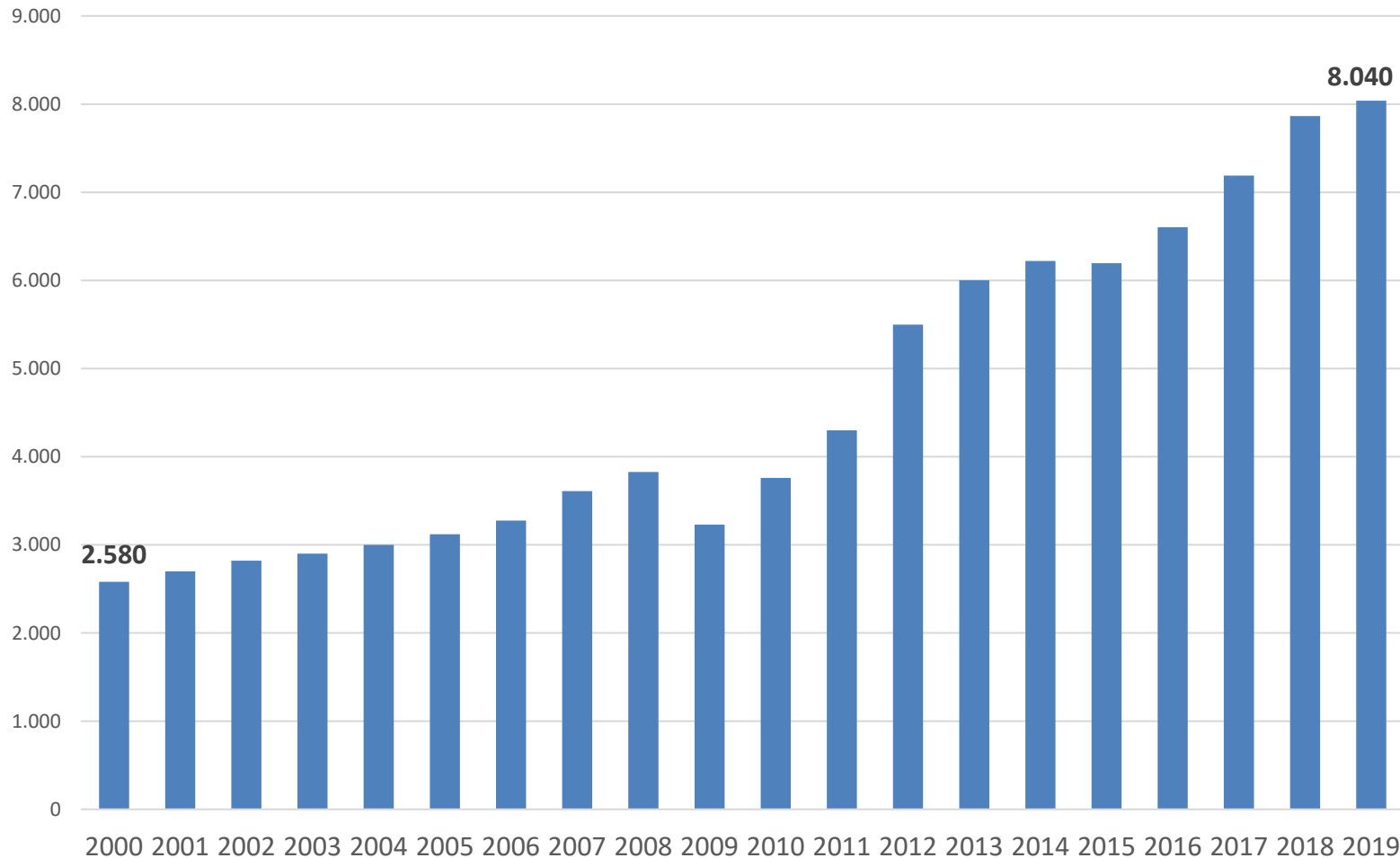


Riccardo Cavanna, Vice President



ITALIAN INDUSTRY

Packaging machinery



2000-2019

From 2,6 to 8,0 bln €

The sector turnover has tripled

CAGR '00/'19:

Packaging machinery: +6,2%



616 companies

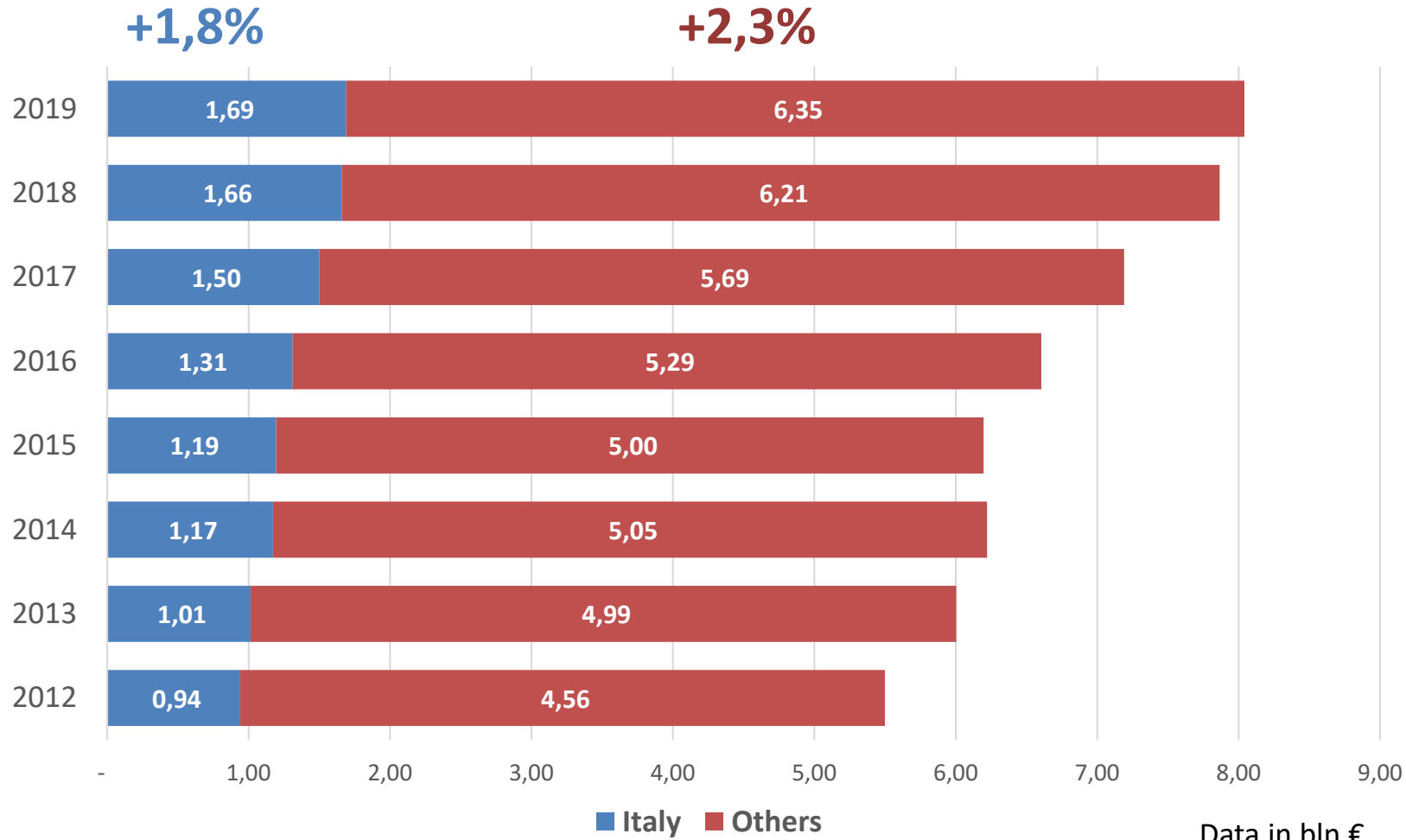


33.3k employees



ITALIAN INDUSTRY

Packaging machinery



+1,8%

+2,3%

CAGR 12/19
Italy: +8,7%
Others: +4,9%

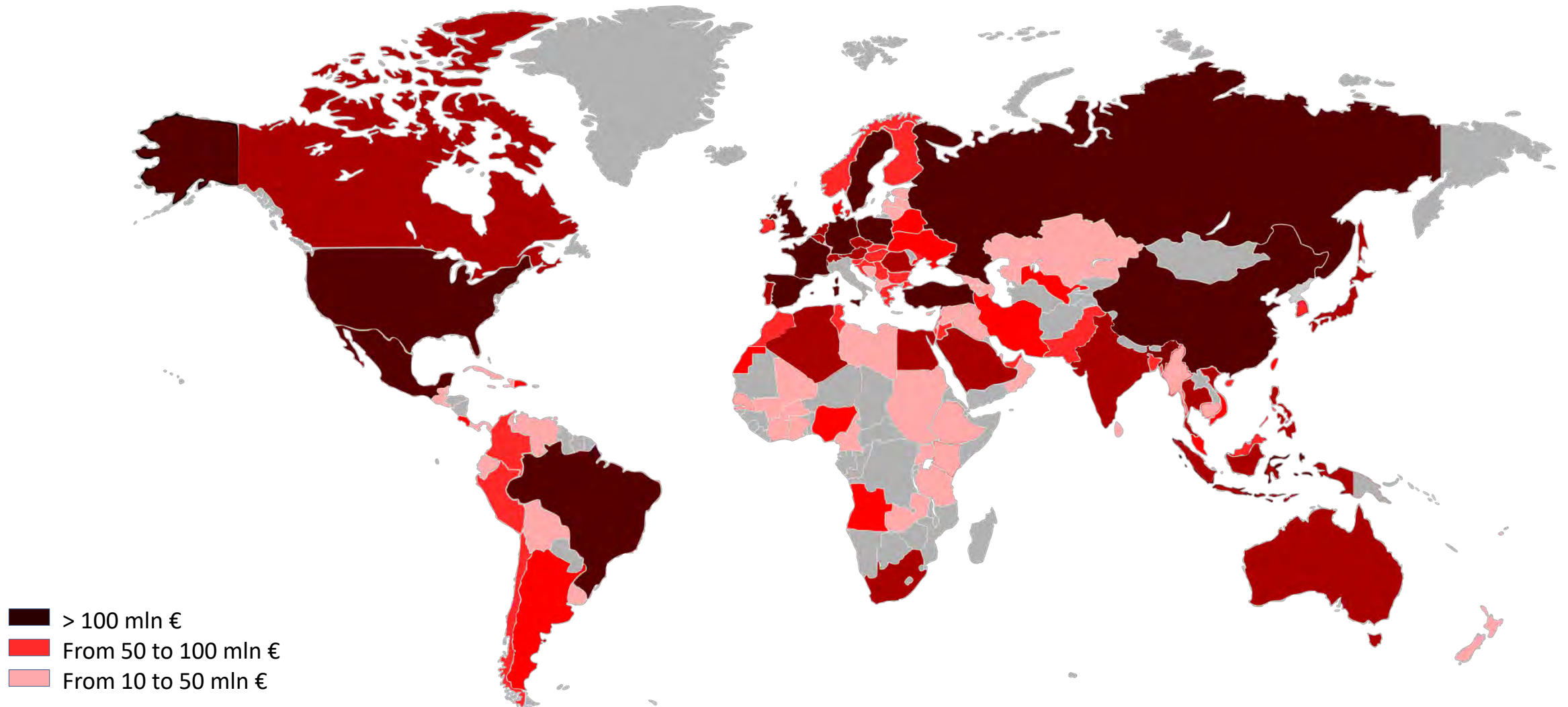
Data in bln €



UCIMA

EXPORT

Countries in which Italy exported at least for 10 mln €



The Italian packaging industry

- 500 industrial-size companies
- 100 other smaller companies
- 8 bill Euro Turnover. 83% of which on International markets

M A D E I N I T A L Y

FACTORS OF SUCCESS

M A D E I N I T A L Y

- High production flexibility combined with utmost reliability and technological innovation;
- Combine leading-edge electronic technology and traditional mechanical technology (leadership in mechatronics);
- Follow market trends, offering more frequently integrated packaging lines instead of single machines;
- Invest huge resources in research and development and innovative packaging materials with low environmental impact;

FACTORS OF SUCCESS

M A D E I N I T A L Y

- Strong customer orientation: production tailored to the specific needs of individual companies;
- Great attention to design, testing, quality control and customer analysis;
- Understanding and fully satisfying the "aesthetic" and marketing needs of customers, balancing them with their technical/construction requirements;
- Internationalization, through service centres linked to local branches and agents, assisted by technical experts.
- Managing across culture



ITALIAN INDUSTRY

Top players



MARCHESINI
— GROUP —



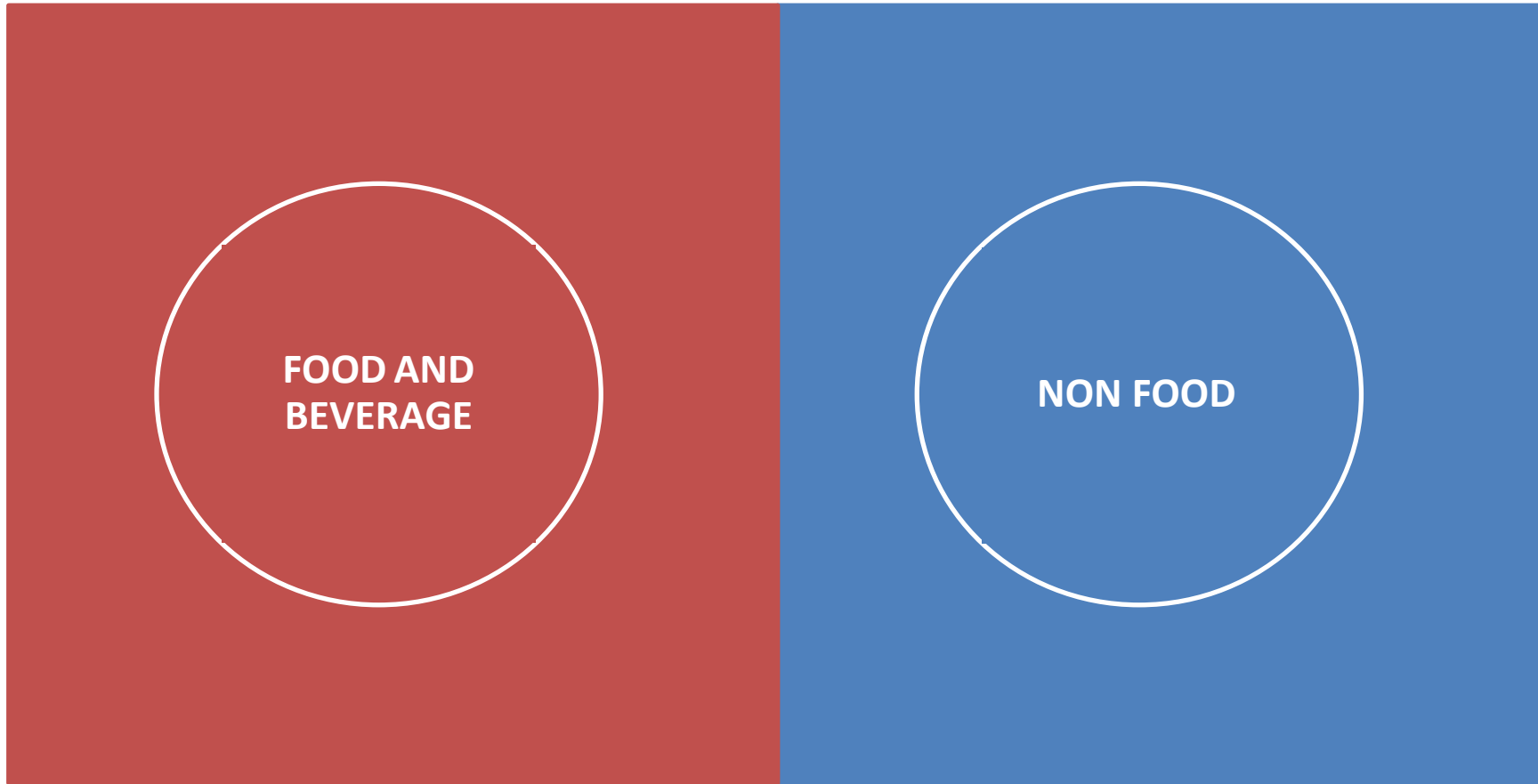
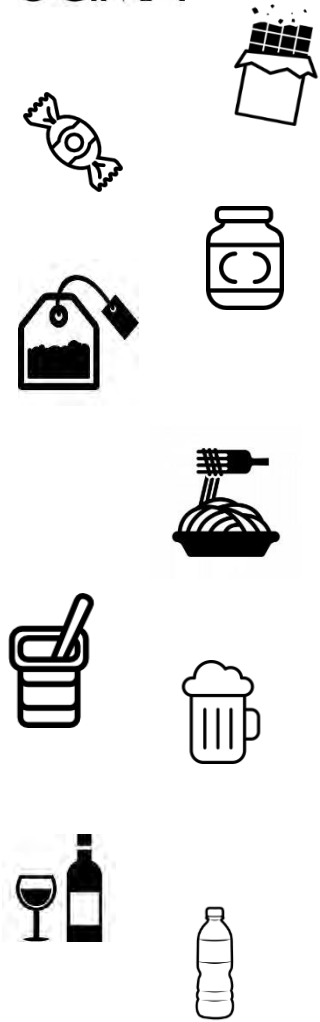


WHAT TO PACK?



UCIMA

WHAT TO PACK?



55.3%

44.7%





WHAT TO PACK?

FOOD

**How do companies
classify the
different types of
food?**





WHAT TO PACK?

BAKERY AND GRAIN BASED FOOD





WHAT TO PACK?

CONFECTIONERY





WHAT TO PACK?

DAIRY





WHAT TO PACK?

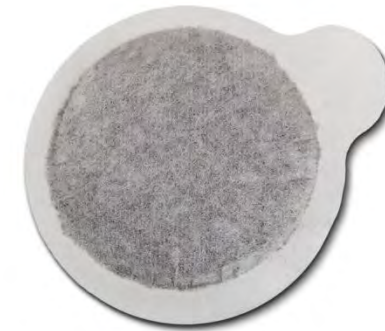
FRESH FOOD





WHAT TO PACK?

TEA AND COFFEE





WHAT TO PACK?

CONVENIENCE FOOD





WHAT TO PACK?

BEVERAGE





WHAT TO PACK?

BEVERAGE

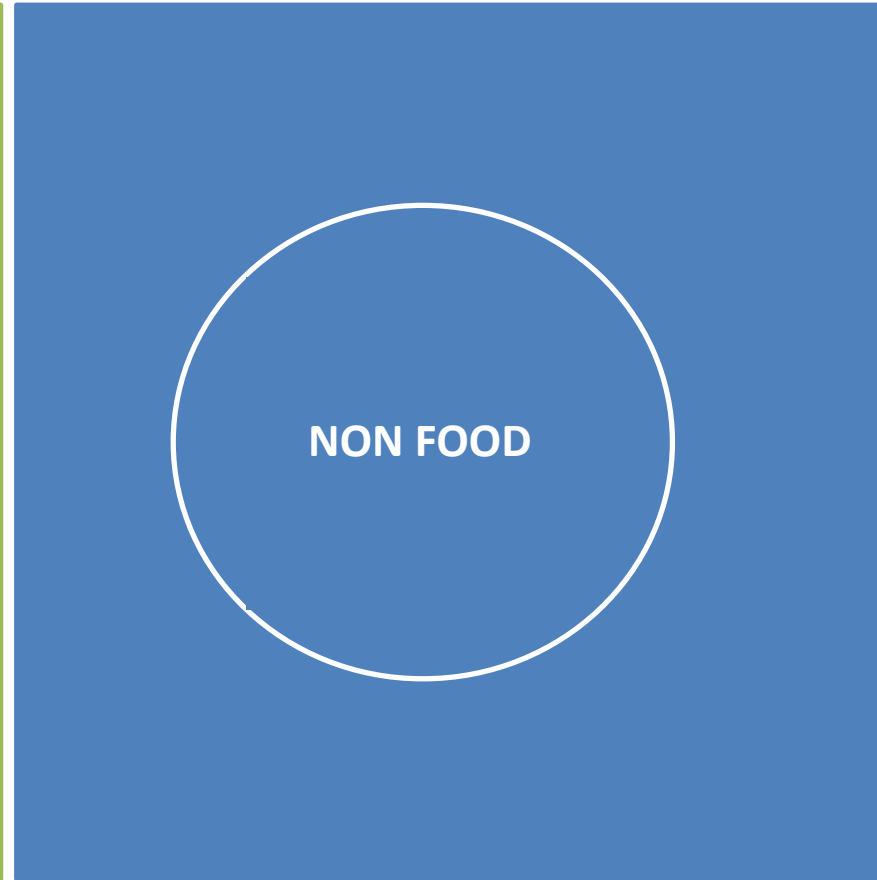




WHAT TO PACK?



55.3%



44.7%





WHAT TO PACK?

PHARMACEUTICAL





WHAT TO PACK?

COSMETIC and PERSONAL CARE





WHAT TO PACK?

CHEMICAL and PETROCHEMICAL





WHAT TO PACK?

OTHER GOODS





WHAT TO PACK?

OTHER GOODS



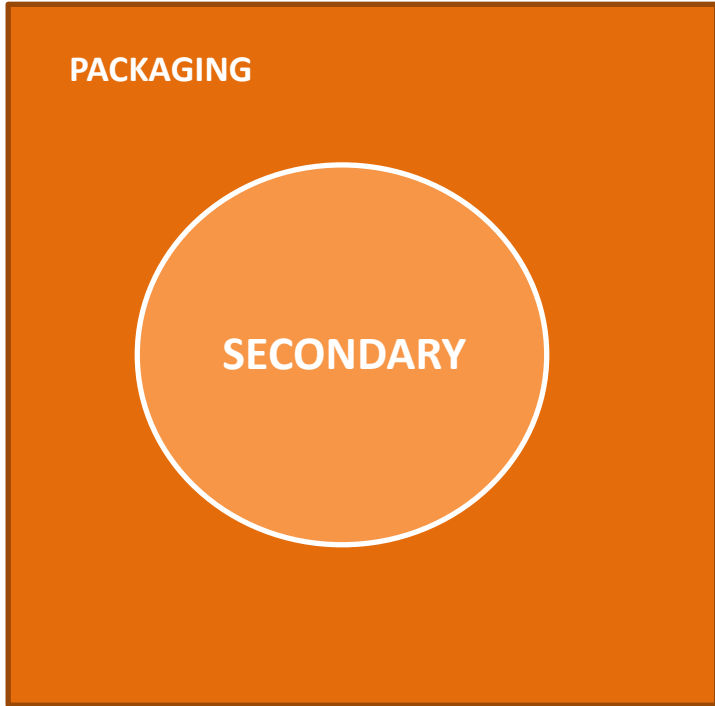


HOW TO PACK?

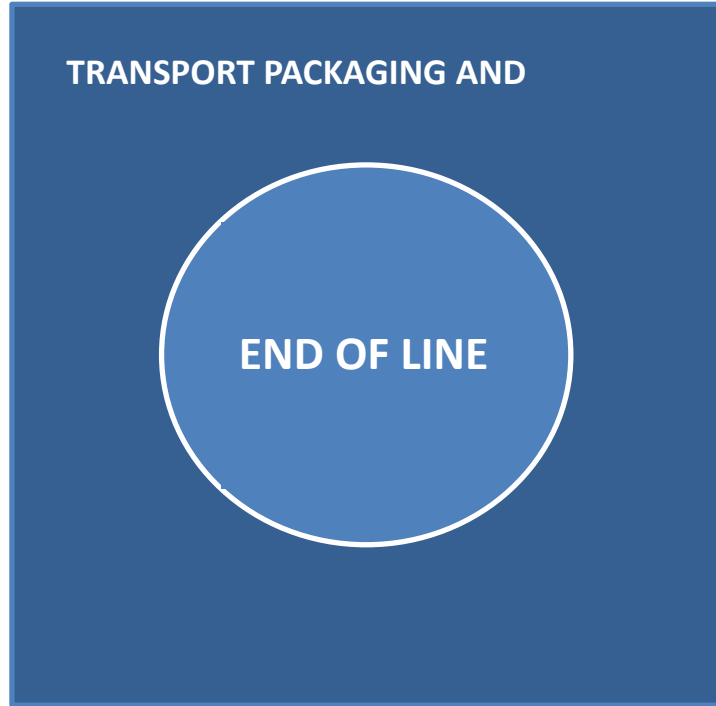
WHAT ARE THE TECHNOLOGIES FOR PACKAGING?



From the bulk product to the primary package



From the primary package to the secondary package



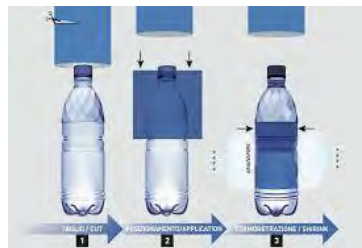
From the secondary package to the pallet





HOW TO PACK?

LABELLING AND AUXILIARY EQUIPMENT





THANK YOU!

