



Deutsche Messe



Press document

**PRODUCTS FOR MATERIALS HANDLING:
ON THE ROAD TO ECONOMIC RECOVERY VIA
INTRALOGISTICA ITALIA 2015**

Vehicles, equipment, installations and systems for continuous transport and lifting, warehouse systems, industrial lifting trucks, wheels and accessories, electric batteries, mechanical and automatic manipulators, machines and packaging and weighing systems, hardware and software management, products and identification systems for automatic management of data and information, installation design and layout services: these are the most important product categories that make up the diverse landscape of industrial handling on display in halls 6 and 10 at Fiera Milano-Rho from May 19 to 23 at the first edition of INTRALOGISTICA ITALIA.

This is a market in Italy estimated to be worth a total of 4 billion euro in relation to the principal areas of forklifts and lifting equipment and which presents different characteristics and problems from one area to another.

The sector has in fact always been among the most exposed to recession phenomena due to its operations in areas of non-primary durable goods and thus is closely linked to and conditioned by reductions in industrial investment before others.





No other manufacturing sector like in-company intralogistics can boast applications and uses in all branches of industry, distribution and services. In this regard, Jan van der Velden, President of FEM -European Federation of Materials Handling- states *"Often we qualify as an expert and omnipresent industry. We are competent because we build equipment that permits the movement, storage, control and care of materials, goods and products. We deliver efficient and sustainable, organizational and technical solutions for materials handling. We are ubiquitous because our equipment is present in almost all production and distribution services, through the whole supply and logistics chain, and during the entire life cycle of products from production to distribution, consumption, and disposal. We can therefore say that our business is absolutely essential in the production and services landscape in Europe."*

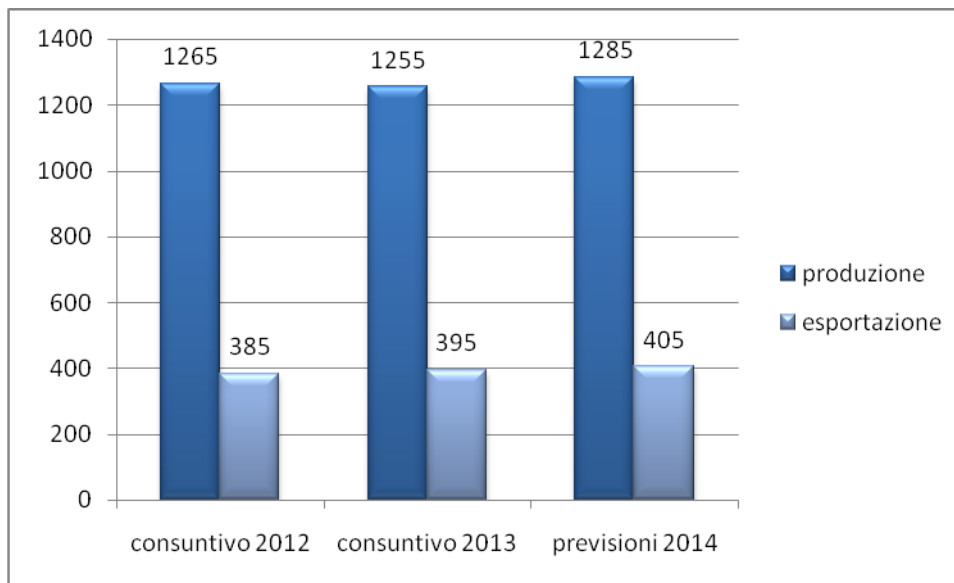
The analysis of statistics published by AISEM (the Italian Association of Lifting, Elevation and Handling Systems) indicates that in the area of vehicles and systems for internal materials handling, self-propelled industrial trucks recorded an increase in the 2014 forecast compared with 2013, both in terms of production (+ 2.4%) and exports (+ 2.5%), while installations and apparatus for lifting and internal transport registered a more modest growth in production (+0.4 %) and in exports (+ 1.1%).

The Italian handling and internal transport industry is among the most important in Europe, both in terms of quality and quantity of production. This role is widely recognised in the declaration by FEM's President. *"Our Italian federation AISEM is a leading member of FEM. Although the crisis has certainly hit Italy hard, Italian materials handling manufacturers remain a significant part of European industry. Furthermore, the Italian materials handling market is still growing. Production has increased slightly in 2014 while exports rose by 3.5%. This growth should be supported so that similar results can be expected in 2015"*. Van der Velden will be present at the fair Wednesday, May 20 as a speaker at the conference *"Materials handling in modern industry"* and will be available to accredited journalists for a brief interview from 9:30am in the Hermes Conference Room (Hall 6).

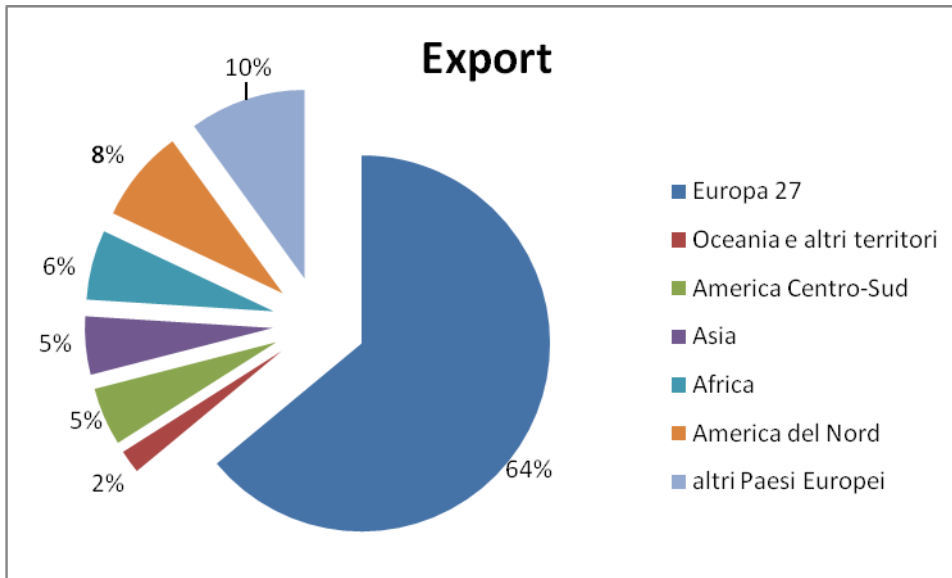




In the semi-propelled industrial trucks sector the final figure for 2013 showed a slight decrease in production (-0.8%) compared to 2012; while awaiting definitive results, a recovery (+2,4%) in production levels equalling 1.285 billion euro is expected for 2014. Exports, destined mainly to European markets, grew in 2013 compared to 2012 (+ 2.6%) and are expected to increase also in 2014, to a total estimated value of 405 million euro. The exports / production ratio is equal to 32%, up by one point on 2013 and up two points on 2012.



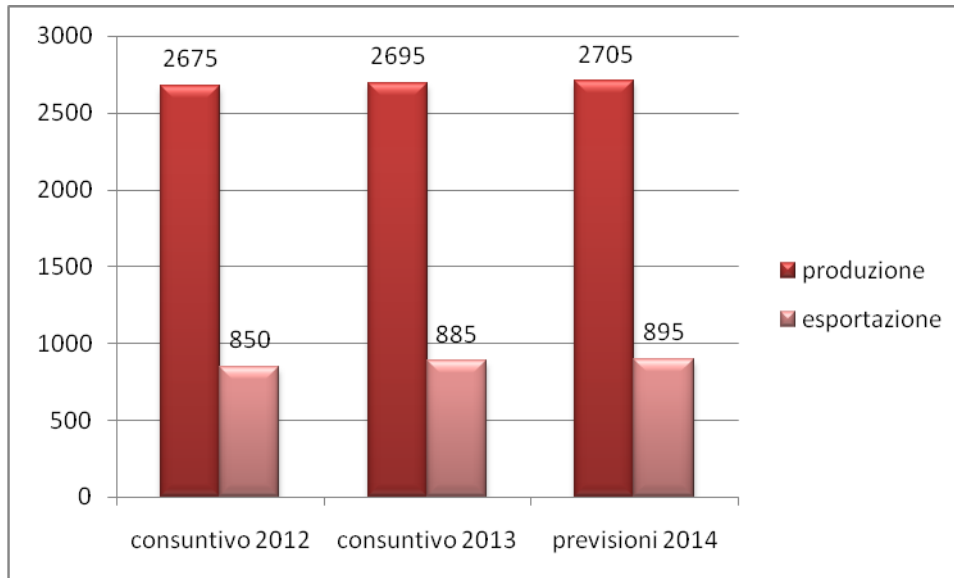
The countries representing the best markets for our products are France and Germany, each of which imports forklifts for a total close to 100 million euro. The UK follows with over 32 million euro, while the US imports forklifts worth 33 million euro. In contrast, for the first nine months of 2013 imports recorded figures of 226.5 million euro; over the years the German industry has shown itself to be the most reliable partner for Italian manufacturers. In 2013, imports by Germany exceeded 130 million euro.



Employment levels in 2013 decreased slightly (-0.4%); for 2014 a number of 4170 employees has been confirmed. Investments are expected to increase to a total of 8.5 million euro, slightly up (+ 3.7%) compared to 2013 (8.2 million). Prices in 2014 remained stable compared to the previous year and registered a decrease of 2 percentage points compared to 2012.

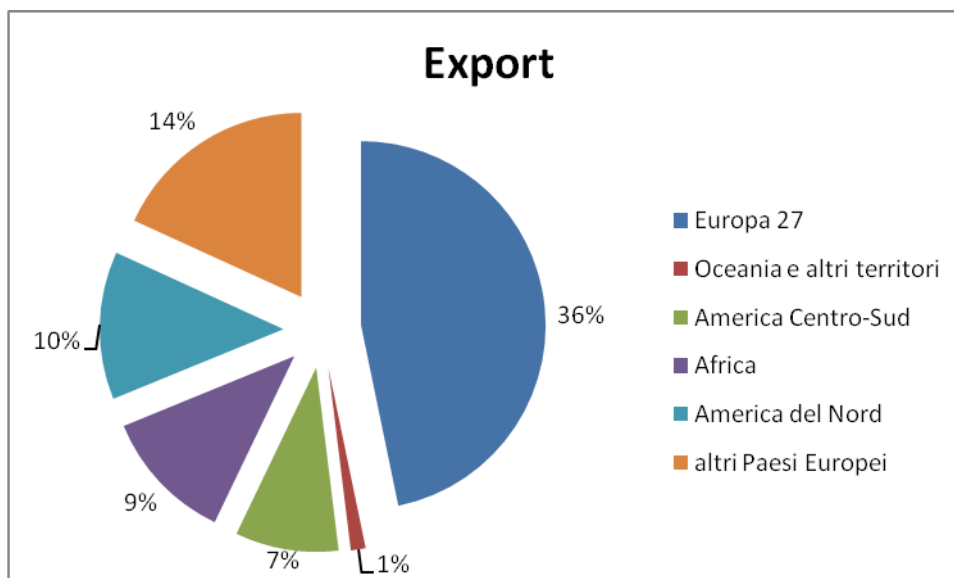
The installations and equipment for lifting and transportation sector closed with a minimum growth in production (+ 0.7%) in 2013 compared to 2012. Estimates for 2014 show further growth (+0, 4%) to a total of 2,705 billion euro. Exports during 2013 were up (+ 4.1%) and, awaiting official figures, are expected to be positive again also in 2014 at a total of around 900 million euro.





The exports/production ratio remained at 33%, showing consistency for two consecutive years.

Also in this area France and Germany are the European countries that import our products most. Furthermore, results for the first nine months of 2013 in relation to exports to the United States were highly significant (+ 27% for a total of approx. 105 million euro). Exports to Russia also increased (+ 49%) as well as those to China (+ 57%) and Iran (+ 140%).





Employment in the sector decreased slightly in 2013 and is expected to register a partial recovery (+ 0.3%) and stabilize at 10,280 employees. Investments have remained unvaried and stable at around 20 million euro. Prices have remained stable for the second consecutive year.

A decrease was registered in the storage facilities market (shelves, warehouses, automated systems), which since 2009 has been showing a steady decrease between 20% and 30% (source Databank). Production in 2011 was worth 545 million euro and 536 million the following year, with a breakdown between shelving and automated plants of 60% and 40% respectively. The distribution of demand in this sector was industry 54%, large-scale distribution (23%), logistics operators (16%), Public Administration (6%), construction (1%). Employment comprises about 1,700 direct employees, excluding therefore linked industries.

INTRALOGISTICA ITALIA will thus be an opportunity for Italian industry to measure its competitiveness with major European and worldwide manufacturers and learn more about the needs of users, operators and technicians who are asking the logistics and handling sectors to support the recovery that, albeit slowly, is surfacing in the country and to provide the added value that companies need to increase their potential in providing services.

INTRALOGISTICA ITALIA is organized by Deutsche Messe AG and boasts the claim "powered by CeMat", a term of great prestige that highlights the authority and know-how acquired in the sector by the German company and will take place in partnership with Ipack-ima SpA, the most important Italian exhibition organizer in the field of mechanical engineering for processing and packaging, and four other related exhibitions (Dairytech, Fruitinnovation, Meat-Tech, Converflex).

INTRALOGISTICA ITALIA will take place under the patronage of the Italian Ministry for Economic Development and of VDMA, the largest association for Industrial Engineering companies in Europe.

Note: Data source for self-propelled industrial trucks and installations and lifting equipment: Anima Research





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