

Press Release

*Milan, July 6th 2017***Italian Handling and Logistics***The first white paper for the industrial trucks,
lifting, cranes and shelving industry sector*

On July 6th, in Milan, INTRALOGISTICA ITALIA and Aisem allied with Anima, jointly presented their White Paper dealing with an analysis of four important sectors in the handling and logistics sector, an in-depth research project that offers a precise picture of the sector's evolution.

This White Paper identifies the financial statements, sales trends, production and profitability of 54 companies in the **industrial trucks** sector, selected from a panel of 143 entrepreneurial businesses present on the national territory. The highest concentration of the companies is in Emilia-Romagna, followed by Veneto, Lombardy and Piedmont. The principal destination market is Europe and approximately 90% of turnover comes from foreign sales. Italy is ranked among the top five on a global level as a manufacturer and exporter. The strategies adopted by the companies that attract clients' attention include those that demonstrate innovation and technological skills, such as maintenance and fleet distance monitoring and control. An interesting phenomenon discovered in the study is that there is a strong trend towards hiring instead of selling machinery and available technology.

174 companies were evaluated in the **lifting** sector. The USA, the United Kingdom, Germany, France and Austria were the most receptive markets for this type of product in 2015. Italy was the second importing partner in Germany, after China, whose share was double the Italian one. Lombardy is the region where the greatest number of companies studied was located. 80% of the direct market was made up of small-medium sized companies. Production was almost exclusively internal and national-based and accessories were prevalently *tailor-made*. There are many companies specialised exclusively in service and maintenance. The product life cycle is very long and this impacts on the obsolescence in the sector, slowing innovation. The division has the greatest number of companies in the sector represented by Aisem. The study also revealed some critical elements for the division, including the obsolete machinery park, as well as a lack of clear regulations and rules and of attention from Institutions.

The numbers are a little lower for **cranes**, a sector that nevertheless is

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considered fundamental to Italian handling and logistics. Once again, in relation to crane manufacturing, the geographical concentration shows northern Italy as the main player. Italy is ranked fifth among countries exporting to the United States, as illustrated in the White Paper. A scant figure compared to the value of German exports to the USA that amounts to more than 50% of the total. Manufacturers are working to acquire new international clients via attendance at international tradeshows. From the study it can be deduced that the sector's future will see an expansion of the manufacturer's role: he will be not merely a product supplier but also a consultant. The product offer focus is moving consistently towards the services component, passing also here from sales to product hire. Innovation in the crane sector requires investment in used materials and to a lower degree in technical and electronic design, which already boasts a very high level.

The 49 **shelving** manufacturers that were part of the study export to Europe with a market share of 76%, while sales to the United States are only 2%, despite the latter being the market with the highest potential, but that has difficulties related to local regulations. Half of the companies involved in the study operate with a production logic that expands to various product families (light and commercial industrial shelving). Critical elements that emerged from the analysis included lack of brand strength, a high level of bureaucracy oppressing the Italian market and regulation diversity on both local and regional levels. The market offers a very fragmented demand due to the presence of many small-sized companies, a peculiarity that often obliges them to personalise products for each client and consequently rationalise their production and distribution chains.

The White Paper is a project developed through the partnership between the trade association AISEM – the Italian Association of Lifting, Elevation and Handling systems – allied with ANIMA – the Federation of National Associations in Confindustria that represents companies in the Mechanical Industry - and INTRALOGISTICA ITALIA, the event, launched in 2015, dedicated to the most innovative solutions and integrated systems for materials handling, warehouse management, materials storage and picking. The agreement has been signed in the light of the second edition of INTRALOGISTICA ITALIA, organized by the Italian branch of Deutsche Messe AG and part of the international network CeMAT, that will be held from May 29th to June 1st, 2018, in the pavilions of Fiera Milano-Rho. INTRALOGISTICA ITALIA is also taking advantage of the opportunity to be a part of a new exhibition event called "The Innovation Alliance", which brings together five exhibitions dedicated to the same number of capital goods sectors in order to increase the number of specialized visitors



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present at the tradeshow grounds.

Companies or private parties that register at INTRALOGISTICA 2018 by September 29th, 2017 will receive a complimentary copy of this in-depth research project, published in several volumes.

"INTRALOGISTICA ITALIA has signed a partnership agreement with AISEM allied with ANIMA and offers its exhibitors this in-depth study of the sector that up to now was unavailable and needed " explained Andreas Züge, General Manager of Hannover Fairs International, the Italian branch of Deutsche Messe AG, organiser of the event, "demonstrating that we do not wish to limit ourselves to offering only a showcase of international scope where demand and supply can meet. We also want to provide instruments that are useful for evaluation of company strategies and for building better awareness of the socio-economic context of reference."

Interested parties may also purchase the White Paper, from both Hannover Fairs International GmbH and from Aisem allied with ANIMA.

The companies registered at the second edition of INTRALOGISTICA ITALIA to date include important industrial names such as: Automha, A-Safe, Bimat LT, Collini, Crown Lift Trucks, Dematic, Distrisort, DMR, Elsa Solutions, FasThink, Fomir, Go Systems, Heute Maschinenfabrik, Incas, Interroll, LCS, Mecalux Italia, Mlog, Modula, MPM, Omron Electronics, Rite-Hite Italia, SPE Elettronica, SSI Schäfer Systems, Swisslog, Tellure Rôta, Tente Ruote, Vipa and Wubump.

The study was conducted on the basis of publicly available information, obtained through BvD-AIDA in relation to company financial statements, Istat, Eurostat and Un-Comtrade in relation to international sales figures, and the Italian Revenue Agency's "BeOnBusiness" database.

Notes:

INTRALOGISTICA ITALIA is the only exhibition with a comprehensive offer dedicated to the most innovative solutions and integrated systems for industrial handling, warehouse management, materials storage and picking.

Product categories:

- Mechanical handling
- Storage technology, site equipment
- Loading technology
- Complete systems for logistics, materials handling technology
- Traffic organization
- Intralogistics systems and software
- Logistics services for transportation
- Logistics services, outsourcing solutions
- Real estate logistics sector

INTRALOGISTICA ITALIA - International Trade Exhibition for Materials Handling, Logistics and Intralogistics -
May 29 - June 1, 2018 – Fiera Milano, Rho (Milan).





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AISEM - Italian Association of lifting systems, lifting and handling - AISEM groups 8 product categories together, divided into 4 sections, which refer to "lifting and transport" and "self-propelled industrial trucks." The first segment employs 10,300 people in Italy, with a turnover of 2.7 billion Euros and an export/revenue share of 32%, while the industrial trucks sector employs 4,180, with a turnover of 1.36 billion Euros and an export/turnover share of 32%.

ANIMA - Italian Federation of Varied Mechanical and Engineering and Related Industries Associations - is the industrial trade organization which, as a part of Confindustria, represents companies operating in varied mechanical and engineering and related manufacturing, a sector that employs 210,000 with a turnover of 44 billion euro and an export/turnover share of 59% (data referring to pre-closure figures for 2015). The macro-sectors represented by ANIMA are machinery and plants for the production of energy and for the chemical and oil industries - assembly of industrial plants; logistics and freight handling; food technology and equipment; industrial technology and products; systems, machinery products for construction; machines and plants for human and environmental safety; metal construction in general.

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