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**INTRA
LOGISTICA
ITALIA**

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Press Release n. 1

INTRALOGISTICA ITALIA (19 – 23 May 2015)

LIGHT AND SHADOWS

IN THE MATERIALS HANDLING AND LOGISTICS ECONOMY

Exports are the drivers in the materials handling and transportation sectors which will be exhibited at INTRALOGISTICA ITALIA 19 - 23 May, 2015 Fiera Milano Rho

Milan, June 25, 2014 – There are those (a few) on the rise and those who are falling. This is what sums up the economic performance in the production sectors that make up the varied landscape of products for internal handling, logistics and freight transport that will be on show at the first edition of Intralogistica Italia, the new specialized exhibition scheduled from 19 to 23 May 2015 at Fiera Milano. The statistics that follow were compiled by the leading associations in the sector.

According to the Memo on the economic situation issued annually by Confetra (the General Italian Confederation of Transport and Logistics), data shows that in 2013 traffic of goods registered a halt in the downward trend experienced in previous years. This positive trend nevertheless is at minimum levels and can be attributed to an improvement in trade with foreign countries, while domestic demand remains weak. The expectations for the current year remain bleak for 15% of operators, 44% expect growth in traffic and 41% stable conditions.

The sector registering the best performance, both in terms of traffic (+4%) and turnover (+3.6%) continues to be courier services. Plus figures were also registered by national carriers (+0.5% in net sales, +1.5% in deliveries) and for road (+3.4% in traffic), air and sea



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haulers. In contrast, a decrease was registered (-5.2%) in the use of railroads as freight carriers.

Analysis of statistics developed by AISEM (The Italian Association of Lifting, Elevation and Handling Systems) indicates that the sector of vehicles and systems for internal handling of materials and self-propelled industrial trucks recorded an increase on the forecast for 2014 compared with 2013, both in terms of production values (+2.4%) and exports (+2.5%), while results in equipment and apparatus dedicated to internal transportation and lifting have been more modest in manufacturing (+0.4 %) and in exports (+1.1%) areas.

The final results for 2013 in the field of self-propelled industrial trucks showed a slight decrease in the production figures (-0.8%) compared to 2012, while a recovery is expected (+2.4%) for the current year in production levels worth an expected value of 1,285 billion euros. Exports, mostly destined to European markets, were up (+2.6%) compared to 2012 and are expected to increase again in 2014, by a total estimated value of 405 million euros. The exports/production ratio equals 32%, two points higher than in 2012.

The countries that are the best markets for our products are France and Germany, each of which imports trucks worth a figure close to 100 million euros. The UK ranks second with over 32 million euros, while the United States registered imports worth € 33 million. In contrast, in the first nine months of 2013, imports were registered at 226.5 million euros and German industry has for years proven to be the most reliable partner for Italian construction firms. In 2013, imports from Germany exceeded 130 million Euros.

Employment figures in 2013 fell slightly (-0.4%); a total of 4,170 employees in the sector is confirmed for 2014. Investments are expected to increase to a total amount of 8.50 million euros.

The systems and equipment for lifting and transport sector registered a final result in 2013 that signaled minimal growth in production (+0.7%), which is expected to increase by a further 0.4% this year, for a total sum of 2,705 billion euros. Exports in 2013 were up (+4.1%) and are expected to continue positively once again in 2014 reaching a figure of around 900 million euros.

The exports/production ratio equaled 33%, consistent with the previous year.

Again in this sector France and Germany are the European countries that import most of our products. Very significant results were also generated in the first nine months of 2013 in relation to exports to the United States (+27% for a total figure of approximately €105





million). 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 record a partial recovery (+0.3%) and stabilize at 10,280 employees. Investments remained invariable and stable at around 20 million euros.

Minus figures were registered in the storage facilities market (shelving, warehouses and automated systems) which has shown a steady decrease of between 20% and 30% since 2009 (source: Databank). Production figures in 2011 equaled 545 million euros and 536 million euros the following year, divided 60% and 40% between shelving and automated systems respectively. Distribution demand was attributed by 54% to industry, 23% to retail chains, (16%) to logistics operators, 6% to PA and 1% to construction. Employment involved approximately 1,700 direct employees, excluding therefore satellite workers.

Another area of interest for "business to business" market is machinery and equipment rental sector. According to estimates made by Assodimi (The Association of Instrumental Machinery Distributors and Renters) the rental market for construction, industrial production and logistics (forklifts, cranes and hoists) amply exceeds 2.5 billion euros.

The complete overview of the entire production levels of these and other sectors that compile the segments of the material handling, logistics and transport sectors will be presented at Intralogistica Italia, the exhibition that fills a long noted gap in the landscape of national trade fairs.

The sector is characterized by enormous diversity in product categories related to the typical functions of internal transport and storage of goods. In fact in addition to traditional means, a variety of other products will also be exhibited such as storage systems, electric accumulators, packaging and order picking systems, weighing and metering devices, management hardware and software, identification technology and auto ID systems for Intralogistics that has long been part of the varied landscape of materials handling. They will be flanked by traffic control technology and systems for improvement in use of logistical infrastructures and real estate.

Intralogistica Italia will provide an opportunity for Italian industry to measure its competitive levels against major manufacturers in Europe and worldwide and to evaluate the needs of users, operators and technicians who are asking the logistics and transport sectors to support the attempts at recovery, which albeit slowly, are surfacing in the



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country and also to provide added value that companies need to increase the potential in offering services.

Intralogistica Italia is organized by Deutsche Messe AG and boasts the claim "powered by CeMat", an enormously prestigious hallmark that emphasizes the authority and know-how acquired in the field by the German international leading fair. Intralogistica Italia is also partnering with Ipack-Ima SpA, which with its historic trade fair Ipack-ima is the most important Italian exhibition organizer in the field of mechanical engineering for the processing and packaging.

For further information

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