AMAPLAST

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PRESS RELEASE

EXPORTS SLOWING, DOMESTIC MARKET HOLDING
for Italian manufacturers of plastics and rubber processing machinery

The full-year forecast for 2025 developed by the **Mecs-Amaplast Statistics Centre** paints a somewhat checkered picture of the Italian plastics and rubber processing machinery industry, also on the basis of the trend in foreign trade (data from ISTAT).

The drop in exports – on the order of -6% for January-September 2025 compared to the same period in 2024 – produces an **estimated downturn for the entire year of five percentage points** in production, three quarters of which, on average, is exported to foreign markets.

It thus appears that the **positive performance of the domestic market** – which maintained a high level of imports, grown by sixteen points with respect to the first nine months of 2024 – will not be sufficient to counterbalance the lacklustre performance of exports when the consolidated year-end result is issued.

Once again we observe a four-year cycle for exports in the sector. After the robust post-pandemic recovery they have recorded a setback this year, influenced by **persisting turbulence in the markets**. While the contraction of exports lessened progressively to some extent over the year – raising hopes for further improvement in the final quarter – the weak global macroeconomic trend, trade tensions, and ongoing wars have all had an influence on the propensity for investment in many markets.

We observe a **slowdown in sales to all geographic areas**, with the exception of Asia, powered by the two major destinations in the Far East: sales to Chinese converters have increased by 22% and those to Indian converters by 53%.

On the other hand, negative signs are recorded in Europe, with a drop of seven percentage points with respect to January-September 2024, with fewer deliveries to Germany, France, Turkey, the Czech Republic, Switzerland, and Austria, just to name a few markets in the top twenty.

As regards North America, there is a split between the two major countries: while **sales are holding steady to the United States** – despite the great uncertainty caused by the introduction of tariffs – with a reassuring +5%, those to Mexico have collapsed (-41%) after four years of strong growth.

In South America, sales to Brazil have slowed abruptly (-37%) but have increased to other countries that have a fairly large plastics and rubber processing industry such as Argentina (+61%) and Chile (+75%).

Regarding the principal markets on the African continent, good performance among the Mediterranean countries is seen only in Egypt (+19%); in Sub-Saharan Africa, Kenya, and Nigeria closed out a positive third quarter while South Africa's purchases have dropped by half.

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Export destination areas for Italian plastics and rubber processing machinery, equipment, and moulds (January-September – percentage of total and Δ% 2024-2025)			
	2024	2025	Δ% 2024-2025
Europe (EU)	52.6 (41.1)	52.4 (42.9)	-7.0 (-2.6)
North America/USMCA	17.4	16.2	-13.0
Asia/Oceania	16.9	19.6	8.7
Africa	6.7	5.7	-20.5
Central/South America	6.4	6.1	-12.0
total	100.0	100.0	-6.6

"Although the full-year forecast for the domestic market is positive – partly as a consequence of governmental incentives, despite difficulties in reaping the benefits of the Transizione 5.0 measure and the sudden depletion of Industria 4.0 funds – Italian manufacturers of plastics and rubber processing machinery," stated Amaplast president Massimo Margaglione, "are concerned about the geopolitical situation, especially as a result of the **climate of uncertainty** that obliges companies to move cautiously in planning investments."

"The hope," continued Margaglione, "is that governments and supranational institutions quickly implement **rebalancing policies and corrective measures** to mitigate commercial tensions and, naturally, put an end to the wars that continue to threaten global stability."

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Amaplast's promotional activities to support Italian-made products in the sector continue unabated, with particular emphasis on maintaining a presence at trade fairs.

The first quarter of 2026 opens with coordination of the Italian collective, composed of 15 companies, at **Plastex (Cairo, 9-12 January)**, with further public relations initiatives handled by ICE-Agenzia.

This will be followed by a presence at **Plastindia (New Delhi, 5-10 February)** where, in addition to the Punto Italia, a reference point for the nearly 40 Italian direct exhibitors, an Italian Technology Day will be organized (again in collaboration with ICE-Agenzia), an event that will allow Italian companies to present themselves to local operators and network with potential customers.

Lastly, a Punto Italia will be set up also at **Expo Plasticos (Guadalajara, 24-26 March)**, where the supervisor of the Amaplast Desk in Mexico City will review the local industry.

These fairs will also be opportunities to promote **PLAST 2026 (Milan, 9-12 June)**, organized by the Amaplast service company.

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