

State Of The Industry Report 2020: Acimall: The Third Quarter Of 2020 ^[1]



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The figures for July-September 2020 clearly reflect what's happening in this key segment of the Italian mechanical engineering industry. In general, the orders of machinery and tools for wood and furniture are recording a decreasing trend below expectations, which indicates a partial improvement of the economic situation compared to the previous quarters, strongly impacted by the *lockdown*.

This trend indicates that the industry's production system has identified the necessary countermeasures to carry on, within a context where the role of digital communication tools to support business is getting stronger and stronger; the effectiveness of these tools is directly proportional to the skills available in each company and developed in recent years, as well as the investments made in this area. Webinars, online demos and "digital conversations" are helping companies keep their business relations on global markets alive, reaffirming their competitiveness to customers around the world, traditionally sensitive to "made in Italy" quality. Digital tools are also valuable in the domestic market, where demand is clearly shrinking and - as requested by the entire Confindustria system and beyond - the effects cannot be mitigated by the incentives to companies that the whole system is calling out loud.

Looking at figures, wood-furniture technology recorded a decrease of orders by 10.1 percent compared to the same quarter of 2019, in line with the trend of the entire machine tools industry. Orders on the domestic market decreased by 32.3 percent, as opposed to a better trend of international demand, which decreased by 1 percent only. This general trend is mitigated by the fact that orders increased by more than 40 percent compared to the terrible period of April-June 2020.

The quarterly survey by the Studies Office of Acimall - the Confindustria member association that represents the industry - on a statistic sample of companies indicates that the orders book is equal to 3.1 months (versus 2.4 in the previous quarter), with a price increase by 0.6 percent since the beginning of 2020. The decrease in revenues, compared to the same quarter of 2019, amounted to 9.5

percent, another “reassuring” figure if compared to minus 29.8 percent in the previous quarter.

According to the quality survey, 47 percent of the interviewed companies indicate a positive production trend, 18 percent decreasing and 35 percent stable. Employment will be stationary according to 65 percent of the sample, while 29 percent expects a reduction and only 6 percent believes it can increase.

Available stocks are stable according to 65 percent of the interviewees, increasing for 6 percent and decreasing for 29 percent.

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