

*Summary based on Istat data drawn up by Marmomacc Observatory and Confindustria Marmomacchine*

## **FIRST QUARTER 2015:**

### **ITALIAN NATURAL STONE AND STONE PROCESSING TECHNOLOGY**

#### **EXPORTS SET OFF AGAIN**

**Double figure increase for overseas orders of processing machinery and equipment (+18.6%). Good sales of unhewn and processed materials (+3.2%). Exports over the three-month period posted turnover of more than 676 million euros. United States and Germany are once again the leading outlet markets for the Italian natural stone industry.**

**Verona, 16 July 2015** – The Italian marble industry has resumed growth on international markets. Following the consolidation of results in 2014, the first quarter of 2015 is hallmarked by a resumption in exports. This upturn is driven by the 18.6% leap in international sales for stone quarrying and processing technologies, improving turnover up to 260 million euros. A positive performance compared to the first three months of the previous year was also posted by exports of marble, granite and natural stone. Between unhewn and processed products, this segment posted an increase of 3.2%, thanks to 416.6 million euros of international orders.

These results emerge from the first statistical survey for 2015 into the Italian stone industry, based on Istat data, carried out by the **Marmomacc Observatory**, the most important international event in the natural stone industry (the 50<sup>th</sup> edition is scheduled at Veronafiere 30 September-3 October 2015), and **Centro Studi Confindustria Marmomacchine**, the National Association for the stone sector and related technologies.

#### **Processed and unhewn stone materials: export/import details for Italy – first quarter 2015**

The total of 416.6 million euros (+3.2%) recorded for stone material exports from January to March 2015 once again highlighted the added value of **processed products** made in Italy in terms of conquering foreign buyers, with turnover coming to 332 million euros (+3.9%). The remaining export quota was covered by **unhewn blocks and stones** worth 84.5 million euros (-2.6%). This is a reassuring signal for the sector, which closed 2014 effectively on a par with 2013 values (+0.2% increase on an annual basis after three years of sustained growth).

Going into more detail as regards **target markets** for processed materials, the first three months of 2015 saw exports to Europe hold steady (133.9 million euros / -0.2%), Germany (31.8 million euros / +7.8%), Switzerland (19.5 million euros / -8.7%) and United Kingdom (17.2 million euros / +14.2%) where most orders originate. In contrast, exports to **Eastern Europe** fell back (28.1 million euros / -10.1%), although Russia went against the trend to confirm its status as the leading buyer in this area (9.6 million euros / +3.9%).

North America is still the best outlet market outside Europe, with the **United States in front** (88.4 million euros / +2.8%), followed by Canada (9.1 million euros / -7.7%), while results were slightly down in the **Middle East** (47.3 million euros / -3.4%), with Saudi Arabia (16.2 million euros) and the United Arab Emirates (12.4 million euros) sustaining demand

**India and China**, in the first quarter of 2015, are once again the main buyers of unhewn stone materials, respectively with 22.6 million euros (+31.2%) and 20.2 million euros (-13.9%) of imports from Italy.

In the first three months of the year, total Italian **imports** also grew by 9.1% to 99.5 million euros: 72.9 million euros for raw materials (+5.7%) and the remaining 26.6 million euros for processed materials (+19.7%).

*"Positive results in this quarter," said the **President of Veronafiere, Ettore Riello**, "are the best preview in the run-up to the 50th anniversary edition of Marmomacc scheduled at Veronafiere 30 September-3 October. As can be seen from these figures, exports are vital for the development of a sector in which Marmomacc is the most important b2b and training platform for all operators. Thanks to incoming buyers from more than 140 countries, initiatives set in motion thanks to the Special Made in Italy Promotion Plan implemented by the Ministry of Economic Development and partnership with Confindustria Marmomacchine, we are sure that the 2015 edition of the event will help Italian companies consolidate these fine results posted at the beginning of the year as well as further enhance the internationality of their business."*

There is equally considerable optimism in the comments by the **Honorary President of Confindustria Marmomacchine, Flavio Marabelli**: *"Overall, the entire Italian natural stone materials and machinery chain is still one of Italy's landmark industrial sectors," he said. This is thanks to a value of exports that in 2014 came close to a total 2.9 billion euros, equal to almost 75% of production, for an annual trade balance surplus of nearly 2.5 billion euros. The trends emerging in the opening months of 2015, especially as regards the good performance by some of the most important markets for the export sector, provide useful indications about the stability of Italy's natural stone and related technology industry, which in recent years has managed to maintain and, in terms of technology, even improve on the export levels achieved prior to the 2008 crash."*

### **Technologies, machinery and equipment for the natural stone industry: export details for Italy – first quarter 2015**

As regards the technology sector, which closed 2014 with a small increase (+1.7%), the first quarter of 2015 saw Italian machinery builders export machinery and equipment for the quarrying and processing stone materials worth in all around 268 million euros, an increase of 18.6% compared to the same period in 2014. The recovery in this important segment of Made in Italy was spearheaded by non-EU markets, with the **United States** again ranking first as the outlet market for exports in this sector, with orders coming to 34 million euros (+86% compared to 2014). Second place is taken by **Turkey** (23 million euros /+1.8%) and third by **Brazil** (21.3 million euros / +88.2%). The first European market is once again **Germany**, ranking fourth in overall terms with 18.2 million euros of imports (+29.3%).

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