



The winds of crisis have not crushed the woodworking machinery and technology industry. The 2010 edition of **Xylexpo** – the biennial exhibition of woodworking technology held at FieraMilano-Rho from 4 to 8 May – proved this. Despite the reduction of exhibition area and exhibitors, and despite the economic indexes of the industry that announced an uncertain recovery of economic trends, from Fieramilano-Rho there came a strong and clear sign of optimism after a season of severe crisis. The opinions we have collected and written in the next pages show clear satisfaction among exhibitors. There were 652 in total, 225 from abroad (led by **Germany** with 70 companies, followed by China with 21, Taiwan with 16, Czech Republic, Spain and Austria (11 each), on a total net surface of 42,500 square meters; at Xylexpo, they met 51,480 visitors, with a 48 percent share of international operators.

The reduction in absolute terms is clear and undisputable: in 2008 there had been 850 exhibitors on 73 thousand square meters and 81 thousand visitors. But how could such levels be preserved in an industry where global business has lost as much as 37.5 percent? For this reason, all in all, Xylexpo 2010 – held concurrently with Bias, Fluidtrans Compomac and Mechanical Power Transmission & Motion Control, organized by Rassegne (a Fiera Milano Group company) dedicated to industrial components – was a positive edition and proved to be a “concrete”

event. Maybe because the decision of some leaders to move to Rimini increased the interest for other companies that were in Milan; maybe because, in times like these, no one visits an exhibition if they are not really interested, so the operators were all motivated, attentive, highly interested...

**Acimall** – the Italian woodworking machinery and tools manufacturers’ association, that organizes the exhibition through Cepra (Centro promozionale Acimall) and also publishes the magazine you are reading – has gone past a critical edition and is looking forward to 2012. But some reflections must be made: *“It was a good exhibition”,* said the Xylexpo General Manager **Paolo Zanibon**. *“We knew we had to tackle with a difficult season, but Xylexpo has held on, proving it still deserves the role it has been playing for 42 years in the global industry exhibition scenario”.* The same opinion was expressed by Acimall president **Ambrogio Delachi**. *“Many exhibitors have told me about their satisfaction and the quality of visitors coming to Milan, who were actually interested in the acquisition of solutions and technology within the next few months. These businessmen did not just walk around the stands, they had a real need to update their production equipment. There were orders signed during the exhibition, something we had not seen for a long time”.*

But Xylexpo was not just an exhibition: in hall 14, in the **“Xylexpo Arena”**, the event offered a rich pro-

gram of conferences and marked the beginning of a new project that will gather all the resources of the wood industry, starting from the Lombardy forests. The project “**Bosco in fiera**” was a real wood created in partnership with Region Lombardy and FieraMilano and in collaboration with Legnoluca from Majano (Udine), to illustrate the relationship between wood and sustainability, the life of forests and those who work in and with the woods. After the positive results of this year, it is now time to work at the next edition, as we said. The next event, to be held at FieraMilano-Rho **from 8 to 12 May 2012**, will require intensive work, especially to “heal the wounds” that have affected not only Xylexpo, but the entire business of “made in Italy” woodworking technology...

## ECONOMIC SITUATION

Xylexpo was the occasion to take a look at the industry's economic situation. According to the figures distributed by the Studies office of Acimall for the **first quarter 2010**, the recovery trend that had started in 2009 has consolidated, with significant growth rates in foreign markets. According to the trend survey, the industry recorded a 41 percent increase in orders, with foreign markets up by 43.8 percent versus 26 percent on the domestic market. Prices are also rallying, up by 0.2 percent from January to May, while the period of ensured production until March 31 was 1.8 months. The quality survey is still casting some



## THE WORD TO AMBROGIO DELACHI

*Certainly, the “future destiny” of Xylexpo is the key topic, as witnessed by the statements we have collected and reported above. In this respect, we find it useful to publish the words by president **Ambrogio Delachi** in his annual report to Acimall member companies.*

“It is not useless saying that we do wish the reasons that have led the three biggest Italian companies to quit **Xylexpo** and join **Technodomus** will be soon removed. While it's true that an exhibition without the leading Italian players cannot represent the full potential of our industry, it is also true that an event without the leading German and international manufacturers will never be an international event! And an exhibition with an international scope is what we all want, small and big ones. Surely we will work hard to achieve this goal.

From these undisputable facts, we will start negotiations to restore harmony within the association and relaunch our exhibition which, like it or not, is still the most important international event in even-numbered years and a reference in the global woodworking machinery scenario.

If the big companies take their smaller colleagues into consideration – respecting the dignity and the role they have acquired through decades of hard work and sacrifice – and the small and medium ones acknowledge the driving force of large groups for the penetration of new markets, we will certainly find a way to solve the problems that certainly do not improve the already dull image of our industrial system and our country in general”.

shadows, due to the psychological factor. According to first quarter 2010 figures, 26 percent of the interviewees indicate a negative trend for production, while 44 percent expect stability and 30 percent expansion. Employment is stationary for 63 percent of the sample, while 37 percent predict a reduction. Available stocks are stable according to 48 percent of the interviewees, decreasing for 37 percent and increasing for 15 percent.

The future development of the industry is illustrated in the forecast survey: the best expectations are abroad, consistently with the natural export vocation of Italian companies, which boast an export share above 70 percent all around the world; 45 percent of the sample predict a 45 percent increase in orders in the next few months; a constant trend is expected by 48 percent, while 7 percent fear shrinkage (the balance is +38). More cautious forecasts on the domestic side, where 15 percent expect possible reduction, 59 stability and only 26 percent see margins for growth (balance +11).



**ITALIAN EXPORT 2009**  
**Trend of major markets by macro areas\***

		<b>09/08 % var.</b>	<b>Share</b>
25-country EU	423	-41.1	51%
Extra-EU Europe	131	-56.0	16%
North America	46	-60.7	5%
South America	58	-2.8	7%
Africa	48	-30.7	6%
Middle East	46	-33.7	6%
Far East	58	-39.5	7%
Oceania	15	-48.8	2%
Total	825	-43.3	100%

\* Tools not included, in million euros.  
 Source: Acimall Studies office, May 2010.

The results of the **final report 2009** and the **forecasts for 2010** are quite clear. 2009 was a very difficult year: production reached 1,228 million euros, down by 42.2 percent compared to 2008; export accounted for 67 percent of total production (874 million euros), with a 42.4 percent decrease. Import also went down by 37.5 percent and stopped at 123 million euros. The domestic market is worth 354 million (-41.4 percent); also apparent consumption decreased to 477 million euros (-40.9 percent). The trade balance lost 43.2 percent, stopping at 751 million euros. 2010 has begun with timid recovery signs, but the industry will not go back quickly to pre-crisis volumes; on the contrary, enduring weak demand will keep causing serious problems.

The survey also focused on market dynamics in the different regions. tools excluded, **Brazil** is the country where "made in Italy" technology grew up to a value of 38 million euros, up by 13.7 percent, versus a 2.8 percent shrinkage in Latin America. Sales dropped also in the **Far East**, which in 2009 purchased 39 percent less products from Italy, absorbing 7 percent of Italian export for a total value of 57 million euros; down China and Hong Kong (27 million, -33.9 percent), Taiwan (2 million, -80 percent) and India (8 million, -40 percent). **Eastern Europe** outside the European Union suffered from 56 percent export drop, with a value of 131 million euros; Russia confirmed its leading role de-

spite a 65.2 percent shrinkage versus 2008. Switzerland is the second market outside the EU with a value of 23 million euros, down by 19.2 percent. Minus sign also for mature markets. In 2009 the European Union confirmed its role of reference market for made-in-Italy technology, despite the negative trend, absorbing 51 percent of export. The ranking is still headed by **France** with 86 million euros (-20.7 percent) followed by Germany with 69 million euros (-34 percent) and Belgium with 42 (-16,9 percent). Spagna lost 60.8 percent with a value of 34 million euros. In **North America** (where 5 percent of Italian export is shipped), the United States lost 62.8 percent, down to 32 million euro in value.

**OPINIONS**

**SPANEVERELLO**

"Beyond expectations" is the opinion of **Paolo Grandotto**, sales manager of Spanevello ([www.spanevello.com](http://www.spanevello.com)). "We feared lower attendance and contact quality, but it was not so: we prepared the exhibition more accurately and I must say virtually all partners who had confirmed their participation actually came to Milan. We also had visitors from unexpected countries, like Australia, Chile and Brazil, who traditionally prefer Ligna or Atlanta, and instead they came to Xylexpo. A good sign, both for the value of the exhibition and for the signals that something is moving..."

Now we have to anticipate future scenarios the best we can: this year we have all been waiting for things to develop, not knowing what would happen and basically sticking to our past decisions. In 2012 we will certainly have to change direction!

First of all, we have to solve problems within the as-



## ITALY: WOODWORKING MACHINERY

Trend of main economic variables in 2005-2009 and industry structure (in million Euros, tools included)

	2005	Δ%'04	2006	Δ%'05	2007	Δ%'06	2008	Δ%'07	2009	Δ%'08
Production	1,814	-1.9	2,105	+16.1	2,159	+2.6	2,123	-1.7	1,228	-42.2
Export	1,290	-2.9	1,492	+15.6	1,532	+2.7	1,519	-0.8	874	-42.4
Import	154	+14.1	178	+15.5	183	+2.8	197	+6.6	123	-37.5
Domestic market	524	+3.0	613	+17.0	627	+2.3	604	-3.7	354	-41.4
Apparent consumption	678	+6.7	791	+16.6	810	+2.4	807	-0.9	477	-40.9
Trade balance	1,136	-4.8	1,314	+15.6	1,349	+2.7	1,322	-1.9	751	-43.2
Export/production	71.1%	-	70.9%	-	71.0%	-	71.6%	-	71.2%	-
Import/apparent consumption	22.7%	-	22.5%	-	22.6%	-	24.4%	-	25.8%	-

sociation. Technodomus has generated confusion and uncertainty among operators and many of them could not understand what was happening. And in Milan, some longstanding references were missing: this year we changed the position of our stand due to the absence of big groups.

We must all work to make things clearer, discussing and solving problems. If we cannot act all together like a system – concludes Grandotto – we will destroy the credibility we have built all around the worlds through several decades of good work and excellent machines”.

### ORMAMACCHINE

Ormamacchine ([www.ormamacchine.it](http://www.ormamacchine.it)) manufactures pressing plants for the woodworking industry, huge and custom-designed plants “to be competitive with emerging countries”, says **Maurizio Nosotti**, sales manager. Is the crisis over? “It is difficult to give a global evaluation of the market, there are tangible signs of recovery in Europe, except Spain, Portugal and Greece, although at Xylexpo we have met customers from these countries as well”. There were very few visitors from the Arabic region, from Maghrib to the Persian Gulf, “who were missing in Milan, maybe also due to air traffic problems caused by the volcano cloud. And also for the huge number of exhibition very close to one another. On the whole, although expectations were affected by the crisis, this edition of Xylexpo was comparable to previous events.

In my opinion, organizers will have to do all they can to bring back to Xylexpo those who decided to move elsewhere, so that visitors can have a complete review of technology for the furniture and wood processing industry”.

### MAKOR

**Claudio Minocci** – area sales manager of Makor Group ([www.makor.it](http://www.makor.it)), specializing in finishing operations with two companies (Makor and Tecnolegno) – has no doubt: about the crisis, “it seems that we have touched bottom, there have been early signals in recent months and the exhibition confirmed that recovery has started”. A comforting picture for a group that exports 90-95 percent of its products, mainly to China, North America and Eastern Europe, with branch offices in the US and China. “The trend curve is slowly pointing upwards, not only for sales, but also for the flows of customers we saw at the fair”.

### WINTERSTEIGER

“We expected the number of visitors to be smaller than in the past”, says **Daniela Pozzan**, Italy manager of the Austrian company Wintersteiger ([www.wintersteiger.at](http://www.wintersteiger.at)). “If we look at the Italian market, the region I am in charge for, I can tell you that there were less visitors than in 2008, but their quality was definitely higher.

The current economic situation certainly affected the overall figures – adds Pozzan – but we saw some signs of recovery in the weeks before the exhibition, and maybe we were expecting to see a positive effect on arrivals, because it is essential for operators to understand what's going on. And what's better than visiting an exhibition?

I think the massive promotion carried out by Fiera di Rimini for Technodomus had a strong effect and certainly helped attract many visitors. We should consider that many international operators might not have been clearly informed about these Italian stories, and so, when they received an invitation from big actors



*that had always been in the forefront at Xylexpo... Not to mention the fact that the visitors who came in April surely did not come back in May!*

*At Xylexpo, however, visitors could find the solutions of international suppliers within a global context; many exhibitors actually benefited from the absence of big competitors, as they could more easily draw the attention of visitors.*

*I would like to stress the good quality of visitors, at least half of them were unknown to us. Meeting new prospects is one of the key goals when we attend an exhibition, and we achieved this at Xylexpo.*

*We are still curious to know what will happen in the future: what are the intentions of Xylexpo? And Technodomus?"*

## ESSETRE

The point of view of **Gianni Sella**, president of Essetre ([www.essetre.com](http://www.essetre.com)), is dual: the company manufactures working centers for panel processing for the kitchen industry and for the prefab construction industry. Two stands, two exhibition sites in the fair, two different market trends. *"There were more visitors at the stand of construction machinery than furniture, this is an emerging trend. We started to work in the construction industry 5 years ago, and now we offer about one hundred machines"*.

The crisis was heavy (*"Flexibility in production saved the company in difficult months: no forecasts, investing in the essential, production and innovation speed"*, said Sella), but it is not just an impression that recovery is very close, for a company that supplies 90 percent of Italian kitchen makers and exports 30 percent of products. *"To meet market demand, we have employed two more salespersons – adds Sel-*

*la – we want to preserve our position and expand our foothold"*.

## BIGONDRI

Compared to 2009, also in Italy there are timid signs of recovery after the crisis, especially in the packaging industry; abroad, there are "sparks" of light in primary operations, although the general situation is still characterized by shrinkage all over Europe, including Russia. That's **Bruno Bigon**, president of BigonDry ([www.bigondry.com](http://www.bigondry.com)). *"At Xylexpo we promoted the new business area for heat treatment, which is arousing*

*increasing attention"*, said Bigon. And he added: *"An international exhibition is essential to attract visitors from all around the world, although they are less willing to move now, due to the proliferation of exhibitions in Italy and worldwide. Companies are in trouble and these costs can hardly be charged on products"*. A suggestion: *"Better less fairs, but important"*.

## HOMAG GROUP

A strong supporter of Xylexpo's effectiveness is **Jürgen Koepfel**, managing director of Group Homag ([www.homag.de](http://www.homag.de)). *"In even-numbered years – he says – Xylexpo has always been a reference event, the place where we presented our new products. The fact that Biesse, Scm and Cefla decided not to attend this year makes any direct comparison impossible. And the fact that German companies decided to stay in Milan basically creates the same problem for Rimini, which is just a bit more than an open house. Thus, inevitably, Ligna must be considered the only complete event, the only European show at international level.*

*I add that we are very satisfied that the German industry of woodworking technology has decided to stay with Xylexpo, confirming its role of reference exhibition in Italy.*

*And it went well: during the exhibition, we had the opportunity to exchange ideas with the managers of other companies within our group, as well as with friends/competitors, and we shared the same vision. Xylexpo 2010 was like an opera by Verdi, with a quiet start and a relentless crescendo. There were few visitors on the first day, then they increased on the second, further on the third, and so on until Saturday. Many contacts, an excellent percentage of real*



business, and as much as 20 percent of the visitors we met were unknown to us, and they might soon become our customers.

As further evidence, let me add that we have been positively impressed by the number of journalists attending our press conference on the 5th of May. There were more than 50 from all over the world, proving that the industry is very keen on Milan.

We hope – continues Koepfel – that in 2012 the whole industry will come back to Milan: it is vital that Cefla, Scm and Biesse change their minds. No exhibition can be successful if it doesn't provide prospects with a full and comprehensive review of products and solutions. There are things you cannot do with the Web and open houses, although we cannot deny that may we should all revise the function and calendar of the biggest exhibitions worldwide. I think we can achieve a situation where we have one big show each in Europe, Asia and the United States. Xylexpo may not be in a favorable position, but it would still be prominent in even-numbered years, alternating with Ligna”.

## MAURI MACCHINE

**Giampiero Mauri** is the owner of Mauri Macchine ([www.maurimacchine.com](http://www.maurimacchine.com)) and president of Giardina ([www.giardinagroup.com](http://www.giardinagroup.com)). So, he attended Xylexpo with a double role: “It was successful. We were very busy every day and, frankly speaking, we did not expect such result, both for Maurimacchine and for Giardina. We received many visitors, most of whom showing strong interest, we closed deals that were already open and we signed new contracts there and then!

Most operators in Milan came from Europe; there was a good flow of Italians, although their interest was much less tangible and concrete. I must say that, all in all, we did not notice the reduction of visitors recorded by Xylexpo. Our stand was always very busy and we are 100 percent satisfied... one of the best exhibitions we have ever been at. Maybe because the absence of some big actors helped us attract more interest, but I really have to say that this is not enough to explain how things went. But now we have to think about 2012 and the organizers must work to bring back those who moved to other exhibitions, besides looking for ways to reduce costs, which are actually still high. But there is no

doubt that the future will almost entirely depend on how things will go in the different markets. Xylexpo has certainly contributed to set things in motion, but now there will be a key period and we hope we can restart in September with a minimum of production planning...”.

## BALESTRINI

“Xylexpo really surprised us”. There is no hesitation in the statement of **Elio Balestrini**, co-owner of Balestrini ([www.balestrini.com](http://www.balestrini.com)) from Seveso, Milan. “We were more than satisfied, even amazed at the way things have gone. I must say we had low, very low expectations, due to a difficult economic situation which discouraged many to come to Milan. If we add the decision by Fiera di Rimini to organize Technodomus a few days before Xylexpo and the confusion this decision created, you can easily imagine the scenario we were ready to face. Also for this reason we decided to attend Xylexpo with a much smaller stand than in the past, in order to cut costs and avoid investments that are not profitable in times like these... However, the final result was positive, also thanks to accurate preparation and planning; we contacted and informed our customers and we organized specific meetings to present our machines and new applications. We focused on new solutions and in-depth analysis, and this has proved to be an optimal approach, so it will become a new standard for us in the future, starting from next Ligna in Hannover. The visitor flow was smaller than in the past, but I must say that things went quite well for us: we had not sold



*machines during the exhibition for years, but we did at Xylexpo. And the orders we finalized in the following weeks were the result of our decision to be in Milan. It's not mere chance that we are seeing a slight improvement after Xylexpo. Now we have to go back thinking positively, and work all together to solve the divisions that have pushed some big actors away from Milan. An exhibition without the big Italian groups is not complete, although the participation of global leaders preserved its value".*

## VOLPATO

*"In my opinion Xylexpo was excellent", said **Gian-ni Volpato** of Volpato ([www.lasm.it](http://www.lasm.it)). "Certainly the number of visitors has decreased, but those who came were highly motivated: during the fair we closed orders that have improved our situation in the post-exhibition weeks. We did not have great expectations before the event, in view of the dispute with the big groups and the difficult economic situation, even dramatic in some countries.*

*Unfortunately, in the past few weeks we have seen a new slowdown, which we hope is due to the upcoming summer holidays or the alarms launched by media, which inevitably have negative effects on investment decisions.*

*It would not have been bad to have the benefits of a Tremonti Ter law for a while longer, but it really seems unlikely that this law might be extended beyond June 30.*

*Going back to the exhibition, the evaluation is positive, an opinion shared by many colleagues I have talked to in Milan. We met a lot of people from the Middle East, the Mediterranean and the Southern hemisphere. Probably, these are the areas to look at with greater attention in the near future".*

## INCOMAC

*"There was a good flow of visitors", states **Roberto de Joannon** of Incomac ([www.incomac.com](http://www.incomac.com)). "If there was a drop due to the absence of some exhibitors, we were not affected, as our target audiences are the solid wood and primary operation segments, rather than panels.*

*I noticed a significant increase in the quality of contacts at the exhibition. We used to have 400 visits with 50 interested prospects, now maybe we have only 300, but potential buyers are 60... Xylexpo is becoming more concrete and specialized, you see fewer curious people around who don't even know what kind of machine they are looking at.*

*We are also satisfied with the origin of visitors. Knowing that some countries would not be there due to the difficult period they are going through, we met lots of visitors from the Mediterranean region, countries that may be small and complicated, but certainly offer excellent growth trends.*

*Many visitors also came from Latin America... a concrete exhibition, with a good internationality level, which we closed with a better result – let me tell you – than we had last year at Ligna. We are also satisfied with Italian visitors, although Technodomus has probably caught lots of visitors from Central and Southern Italy. Unfortunately, Spain, Portugal, Hungary, Greece and Poland are all frozen markets, while visitors from Scandinavia and the United States have never been numerous".*

## OMGATECH

*"We expected little, we got more. Final mark: 7. This is what I heard from many exhibitors and that's what I think", says **Gianni Ghizzoni** of Omgatech ([www.omga.it](http://www.omga.it)). "Considering the market situation and what happened with exhibitions in Italy, we can say that Xylexpo was a success. There were positive comments from several actors: our German colleagues – who did not ride the wave of confusion and just exploited the situation to their own benefit – seemed to be fully satisfied as well.*





A reduction of visitors was inevitable, as many of them had no need for new technology due to stagnating business, and we should also consider that those who went to Rimini could not extend their visit until Xylexpo.

This takes us straight to the most critical issue: for 2012 we must do all we can to explain that we must join our forces again, and define a new exhibition calendar without divisions and fights. I don't know if this is possible, but I'm sure everyone will do their best. An exhibition is successful when it attracts visitors, and visitors are attracted by interesting offer, by the awareness that they will find what they are looking for and they can compare solutions, systems, aggregates...".

## IMA ITALIA

**Umberto Rivolta** is the manager of Ima Italia ([www.ima-service.it](http://www.ima-service.it)), subsidiary of the German company. "The starting point was not good", he says. "The crisis we all know and the absence of some big Italian organizations announced an event with little satisfaction. But it was not so. We had many visitors interested in our machines and therefore we can say we are more than satisfied with the results achieved at Xylexpo.

Certainly, our decision to focus on quality and technological innovation was rewarding, it is a strategy

that has always distinguished Ima and brought results. Our target consists of companies that are searching for quality and high-level production, and therefore appreciate the distinctive features of our plants. 2009 was a profitable year for us in Italy in terms of sales, and for 2010 we are confident we can repeat this success.

At Xylexpo we exhibited some innovative products like the first numerical control working center for laser-based edgebanding, and an absolute novelty like plasma edgebanding technology. The massive flow of visitors at our stand showed the interest of companies for the innovation and quality of our products and once again confirmed Ima's winning strategy".

## FINITURE

The owner of Finiture ([www.finiture.it](http://www.finiture.it)), **Giovanni Sedino**, is pretty satisfied with the results of Xylexpo. "It is difficult to measure the direct return of this kind of technical exhibitions, because we are not retailers and it is more complicated to draw a final balance. What I can say is we were never hanging out at our stand. Overall attendance was certainly lower, but it could not be otherwise, considering the period and the competition from Rimini. But nevertheless, attendance rates were good and Xylexpo confirmed to be an exhibition where it is worth participating.

It is obvious that the topic of exhibition must be tackled with a new approach. Our company is defining a more standardized approach, based on "modules" to present what is really innovative within our offer. On one side, there is a stronger and stronger need to attend exhibitions with fixed and reliable costs, on the other, there is no use exhibiting solutions or machines that have become commodities, products you can buy as black boxes.

"Now we have to work on the 2012 event", concludes Sedino. "It is essential to focus the promotion activity on operators and industry professionals, trying to communicate something more, something different to make the event more attractive... without forgetting that, as we talk about change, people still wants to see things with their own eyes, touch with their own hands, and compare.

And most of all, let's work to be all together again, getting rid of harmful divisions that only damage the prestige of "made in Italy", which is something we really don't need!". ■

