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The Italian Composites Market

DEVELOPMENT & STATISTICS

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ITALY AND HER COMPOSITES MARKET

- Involved in the research, production and application of composites materials since the early 50's of last century.
- Estimated 1200+ companies in the sector
- More than 40 big companies responsible for the 85% of activity.
- Nonetheless, **micro** and **small** companies produce both for international and home markets
- Italian indicators evidence Italy is slowly, but steadily, recovering from recession.
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THE ITALIAN MARKET



Wind energy



Construction

Automotive



SIZE SEGMENTS: demand, supply & development

- **Carbon fibre** and **glass fibre materials**.
- **Ceramic matrix composites** (aerospace industry. expected to grow in the future).
- **Carbon fibre** composites (big demand, commercial and military aerospace programmes)
- **Composites component manufacturing** processes addressing higher production and cost reduction.



GRP PRODUCTION IN ITALY



Despite the different trends in the markets for the various manufacturing processes, the proportions of GRP used by the major application industries in Italy did not much change from last year.



ITALIAN COMPOSITES INDUSTRY

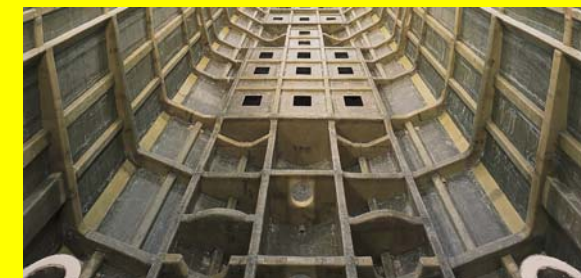
**Mostly focused on Aerospace,
Automotive, Transportation,
Industrial sectors.**

Automotive: quite strong market,
(sector of premium performance cars)
Characterized by many small
companies.

Recently, new sectors are showing a
positive trend:

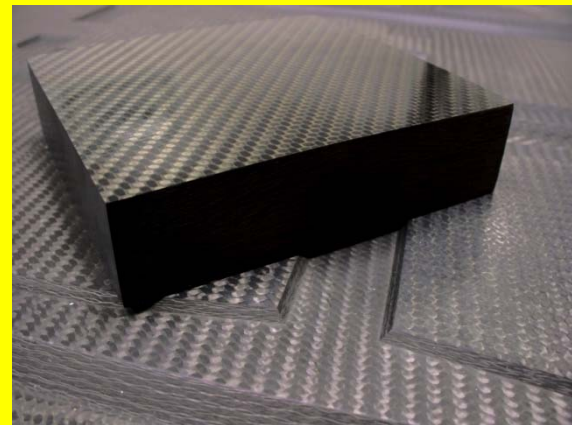
Building & Construction

Renovation, consolidation of existing
buildings, infrastructures – e.g.
reconstructions after earthquakes,



STRUCTURE OF ITALIAN COMPOSITES MARKET

- Most dynamic sectors:
mainly located in the Northern and Central regions.
- Very dynamic SMEs from Southern Italy progressively making their way onto the high-tech application scene (public financing).
- SMEs playing increasingly leading role in innovation (aerospace activities)



STRUCTURE OF ITALIAN COMPOSITES MARKET

Increasing demand:

lightweight materials from the transportation industry,
wind energy as clean energy.

Increasing use:

glass fiber-reinforced composite pipes in sewage & water management and oil & gas industry

composites in the construction & infrastructure applications.



THE STRUCTURE OF ITALIAN COMPOSITES MARKET

Aerospace sector currently leading the way in innovation for the use of carbon-fibre reinforced composites.

Italian companies:
also leaders in the fabrication of composite profiles and body parts for trains

also top manufacturers of high performance carbon and ceramic composite brakes



Most important Italian districts located in North Italy, offering avant-garde products based on an industrial tradition of great prestige and quality.

The Varese district perhaps the most important with 30% of the national export (almost all of the export from Lombardy accounting 33% national exports).

Piedmont poles of Avio Aero, Rivalta and Cameri, specialized in engine components, 40m will be allocated to encourage the development of efficient and eco-friendly propulsion technologies.



EMILIA ROMAGNA

Ingredients to take off an aerospace district able to carve out a strategic role in Europe are also all there.

Current business structure (about eighty companies for 4,500 employees and 850 million euros in turnover) is the small dimension and strong fragmentation.

Starting with the new Mollola-Predappio technopole in Forlì, equipped with a unique infrastructure in the world to test air friction on aircraft (the Ciclope laboratory)

Soon the site of an International Academy dedicated to aerospace technologies.



LAZIO

Aerospace district having the structure of a technology park, consisting mainly in SMEs working as subcontractors for locally based international companies:

Telespazio, Leonardo (formerly Alenia Aeronautica, formerly Selex Sistemi Integrati and already Galileo Avionica), **Thales Alenia Space, Elsig and Mbd Italia.**



Cars and aerospace in Campania

- The fourth industrial revolution is on the way.
- Case of companies having adopted high automation processes or massively using digital tools in management.
- Good propensity for innovation by southern companies: according to a Swg study, the goal is clear for 83% in the South.



Apulian district

Similar to the Campania one.

Aeronautical sector leading the way with 70+ companies and *ca.* 4,200 direct employes.

Mostly in Leonardo-Finmeccanica, such as;

Helicopters Division in Brindisi, producing components and systems with more than 500 employes, and

Aerostructures Division in Grottaglie and Foggia, specialized in the production of components in composites materials for aircraft with about 1,500 employes.

The Avio plant in Brindisi, on the other hand, specializes in the production and overhaul of aeronautical and naval engines.



Institutional funding

100m will go to Bari and Brindisi (development of "a control system for aeronautical and aero-derivative engines" and the R&D of "mechanical transmissions for aeronautical engines and innovative additive technologies"),

60m will be allocated in Campania both for industrial research activities and for innovations in production processes.



CONCLUSIONS-1

- Strong growth expected in the foreseeable future
- Companies are driven by innovations and will maintain and gain market share
- In the next years the demand is expected to grow in the aerospace, wind and automotive sectors.



CONCLUSIONS-2

- Transportation is the second-fastest growing application segment.
- Owing to light weight, increased fuel efficiency and stringent eco-friendly regulations, the use of composites in transport is expected to rise.

This is a general survey of the Italian composites industry.

I thank you for your attention, do not hesitate to contact me should you need targeted informations

