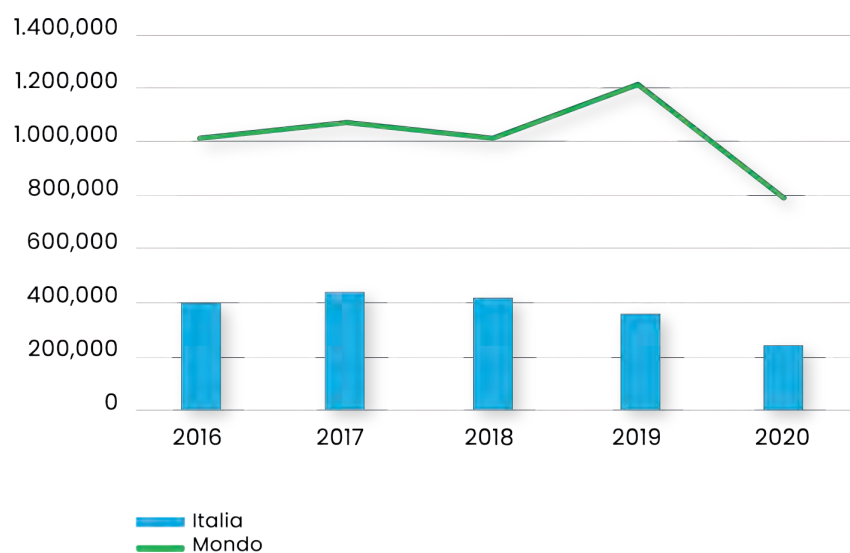


**L'EVOLUZIONE
DELLA FILIERA E
DELLA MECCANICA
STRUMENTALE DI
PELLE, CALZATURE E
PELLETTERIA**

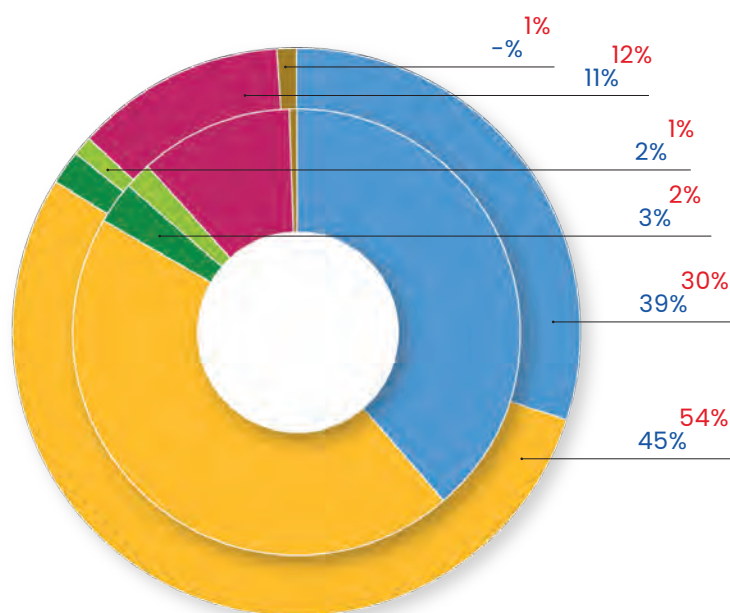
a cura del Centro Studi ASSOMAC

MERCATO MONDIALE DI MACCHINE PELLE, CALZATURE, PELLETTERIA

Trend esportazioni mondiali macchine pelle, calzature, pelletteria - 2016/ 2020



Quota di mercato degli esportatori di macchine pelle, calzature, pelletteria - 2016/ 2020

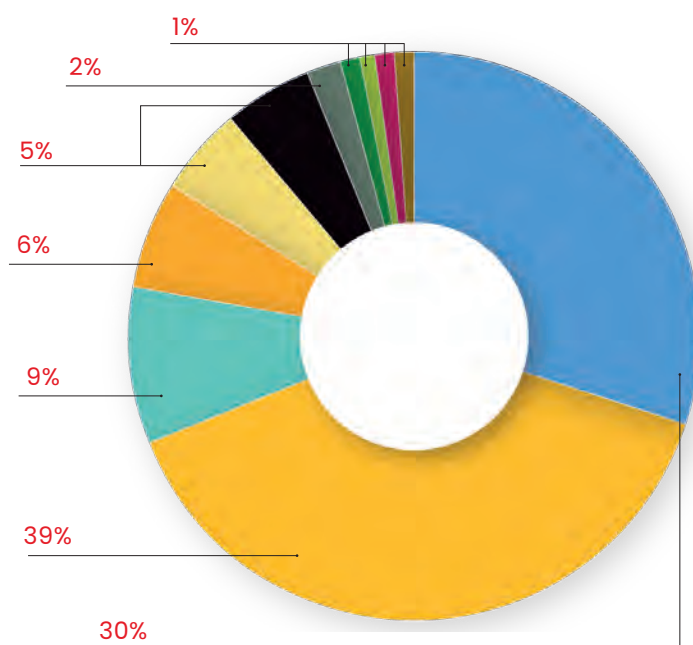


	2016	2020
Italia	39%	30%
Asia	45%	54%
UE (NO Italia)	11%	12%
America	3%	2%
Extra EU	2%	1%
Oceania	-%	1%

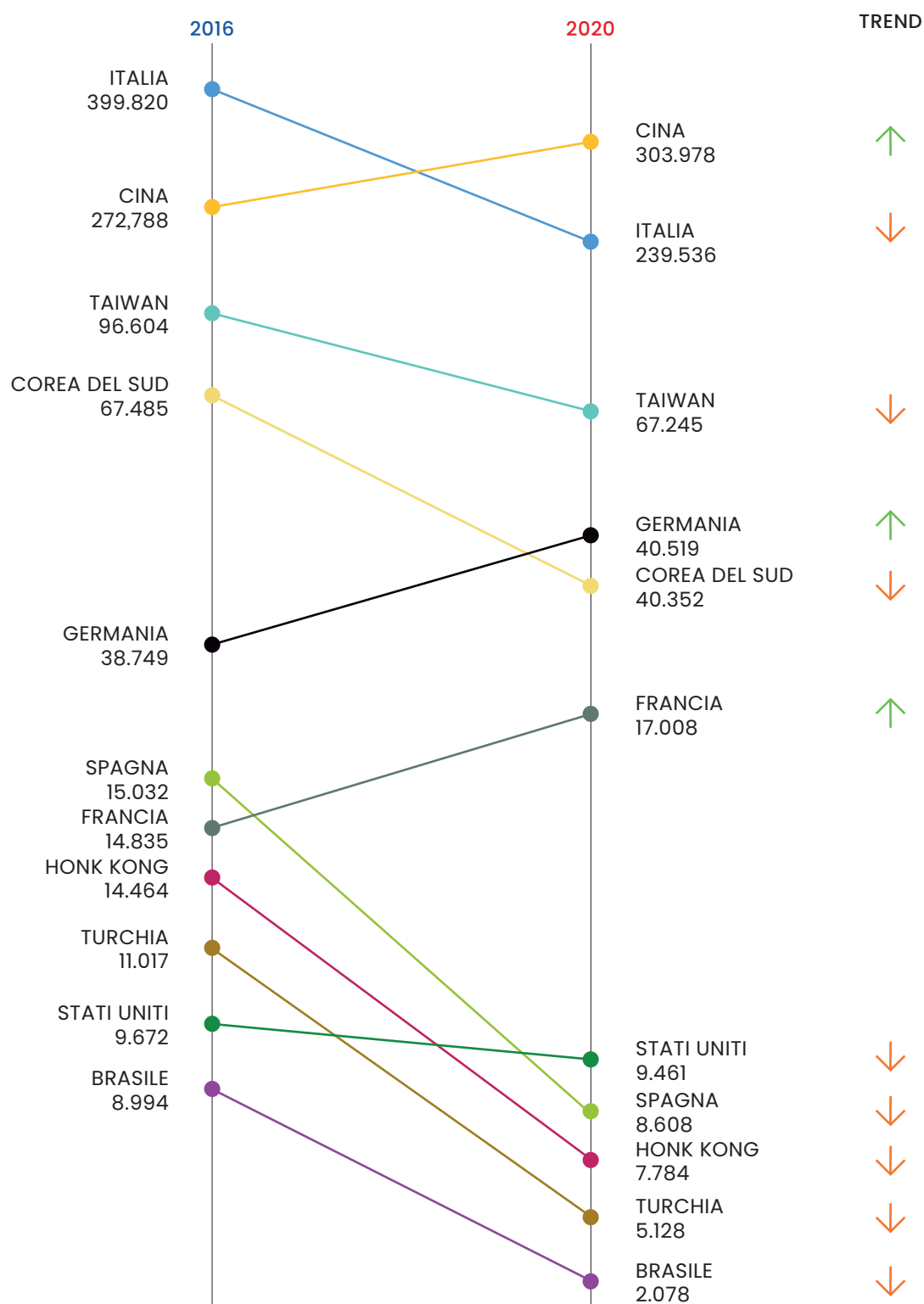


Quota di mercato dei principali esportatori di macchine pelle, calzature, pelletteria - 2020

	2020
Italia	30%
Cina	39%
Taiwan	9%
Altri	6%
Corea del Sud	5%
Germania	5%
Francia	2%
Stati Uniti	1%
Spagna	1%
Hong Kong	1%
Turchia	1%



Principali esportatori di macchine pelle, calzature, pelletteria - 2016/2020







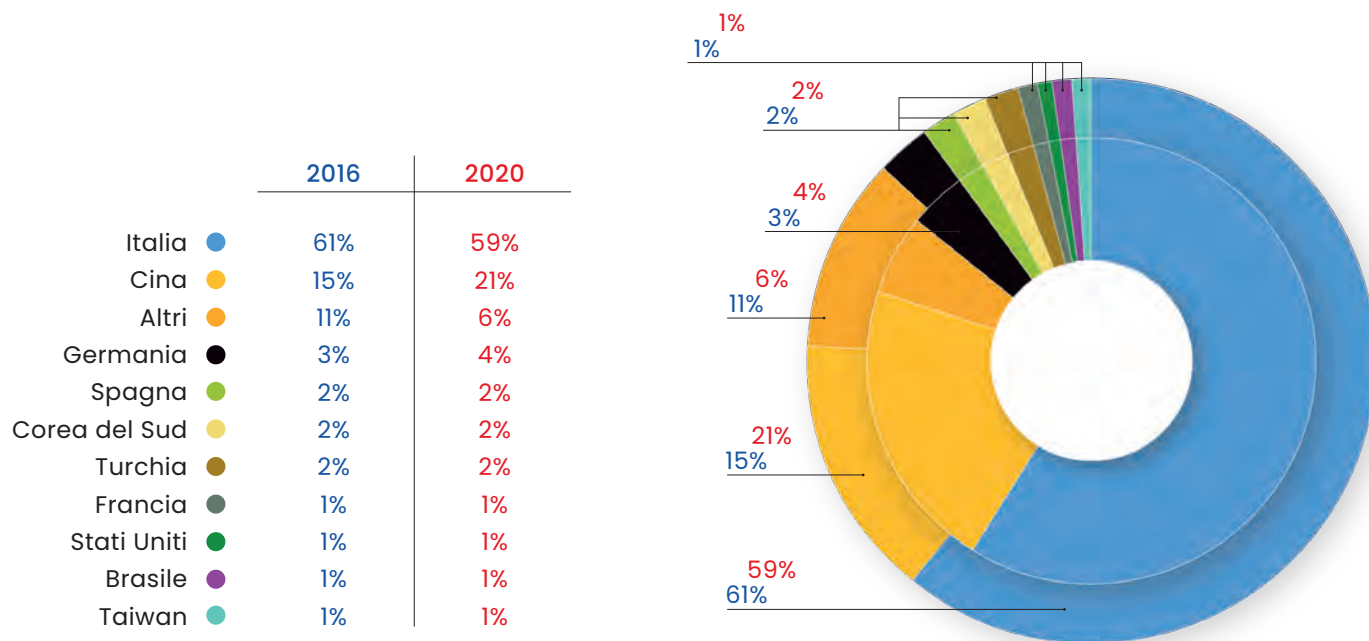
MACCHINE PER CONCERTA



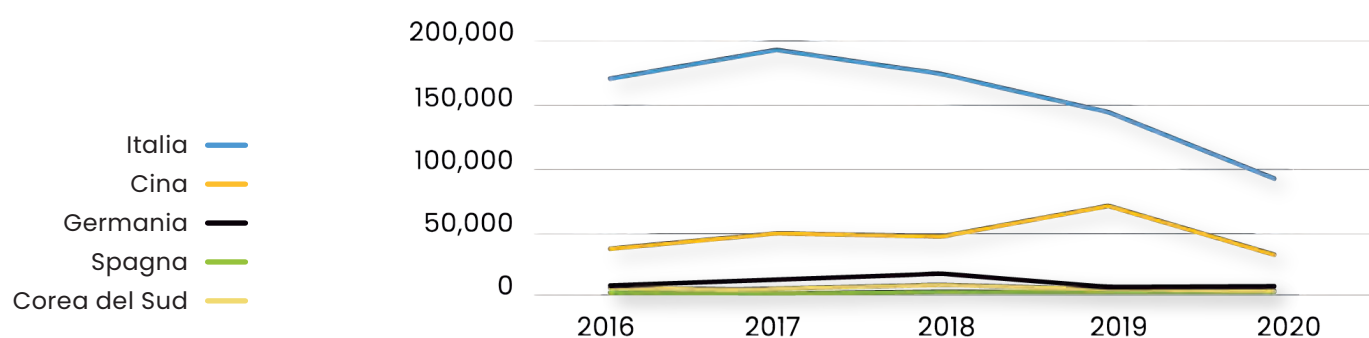
2016 Mercato mondiale Export **256.613**

2020 Mercato mondiale Export **160.329**

Quote di mercato dei principali esportatori di macchine per concerta 2016/ 2020



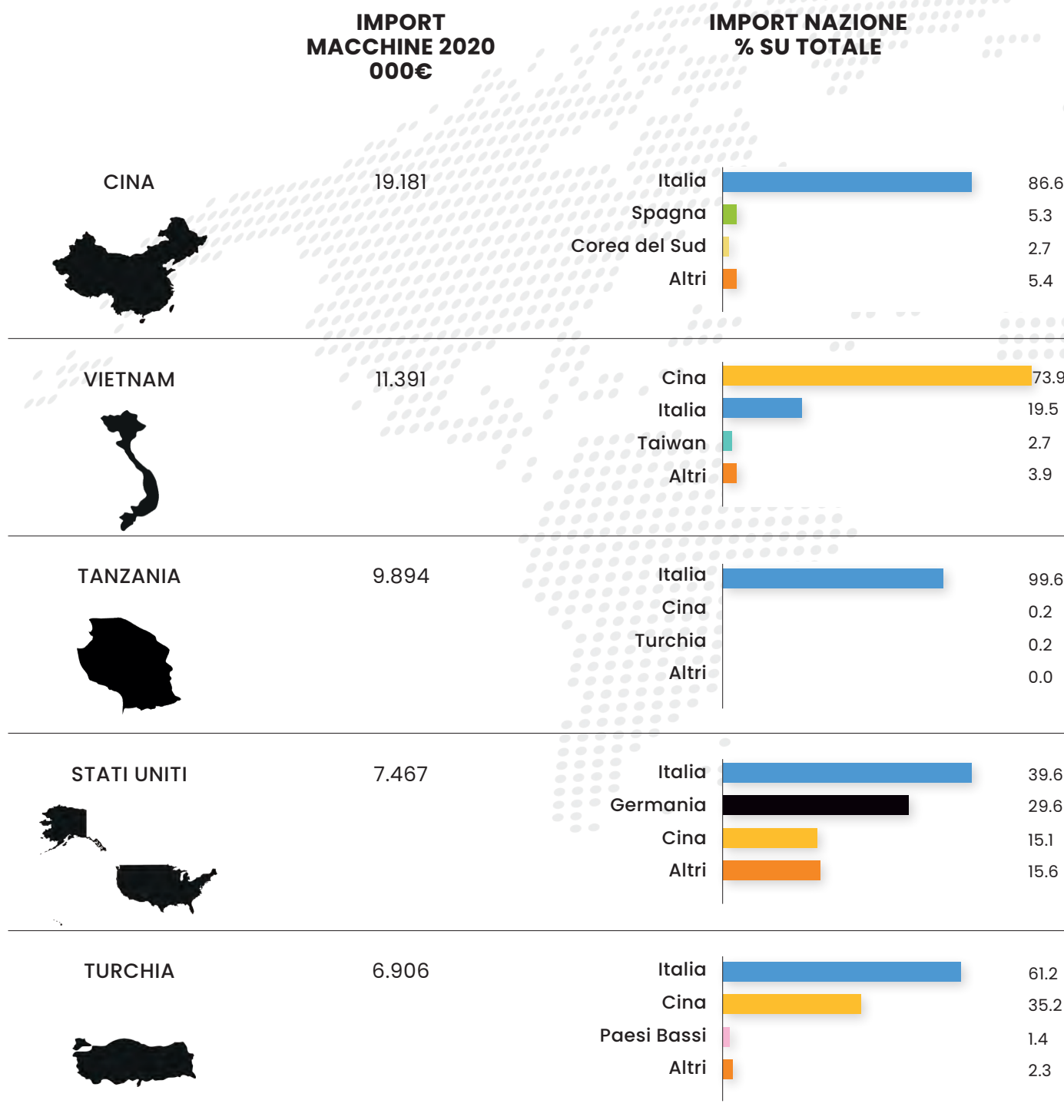
Trend esportazioni di macchine per concerta - 2016/ 2020 (000 €)



		2016	2017	2018	2019	2020
●	Italia	155.896	176.291	159.458	132.794	94.581
●	Cina	37.361	47.952	45.981	67.373	33.301
●	Germania	7.819	11.330	16.136	6.873	7.162
●	Spagna	5.069	5.076	5.244	5.567	3.911
●	Corea del Sud	6.321	4.525	7.784	4.800	3.734

BENCHMARKING MACCHINE CONCIERIA

Sistema Paese Vs competitor export ITA



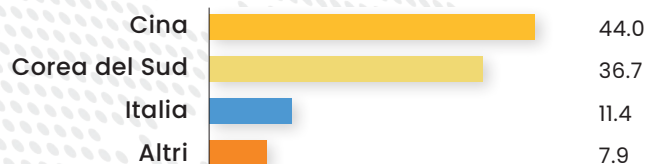


IMPORT MACCHINE 2020 000€

IMPORT NAZIONE % SU TOTALE

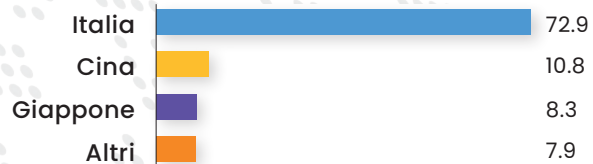
INDONESIA

6.792



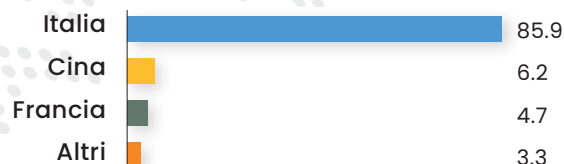
COREA DEL SUD

6.410



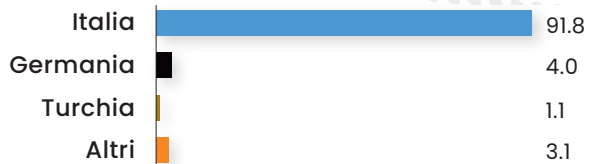
SPAGNA

4.749



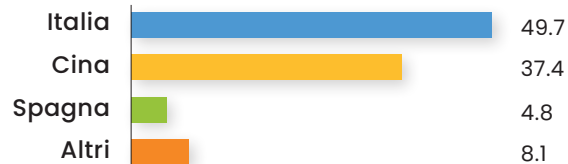
PORTOGALLO

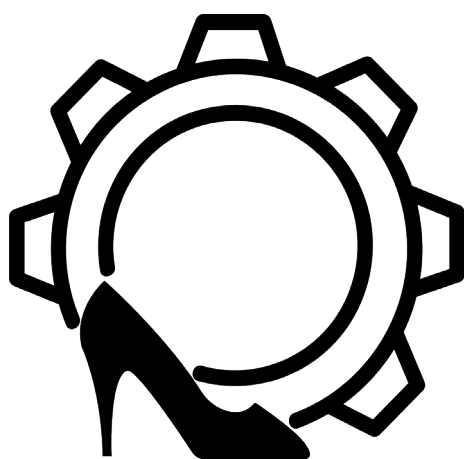
4.696



INDIA

4.518



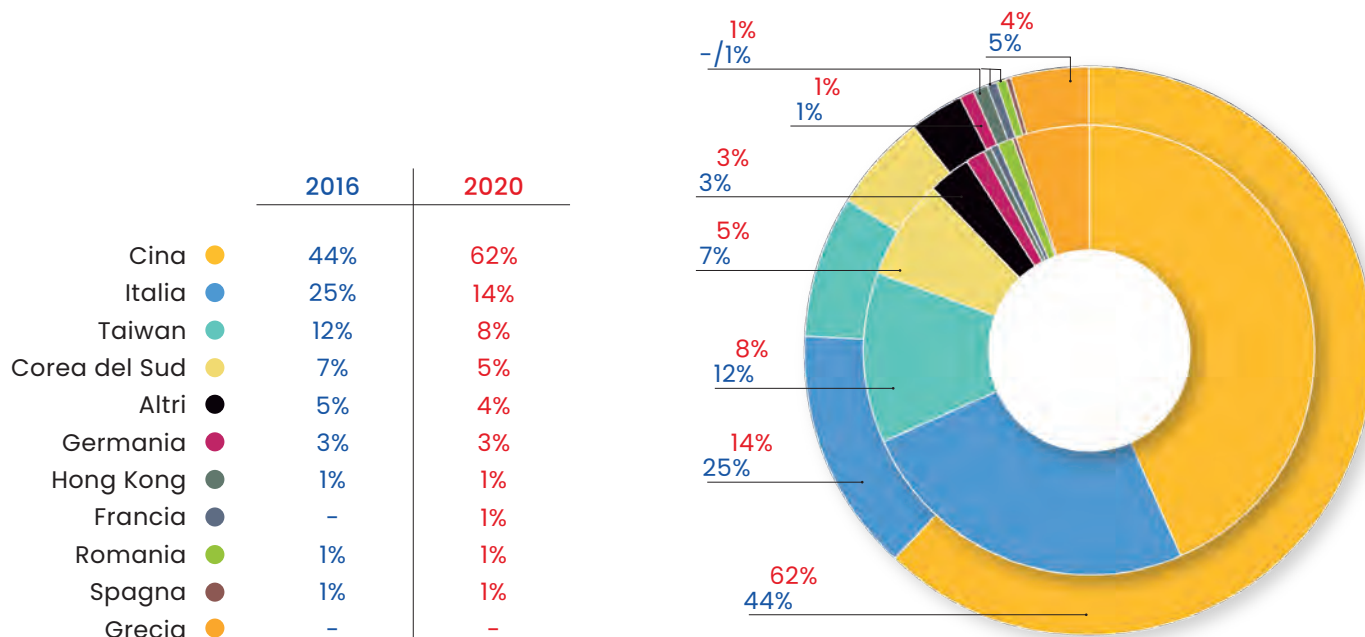


MACCHINE PER CALZATURE

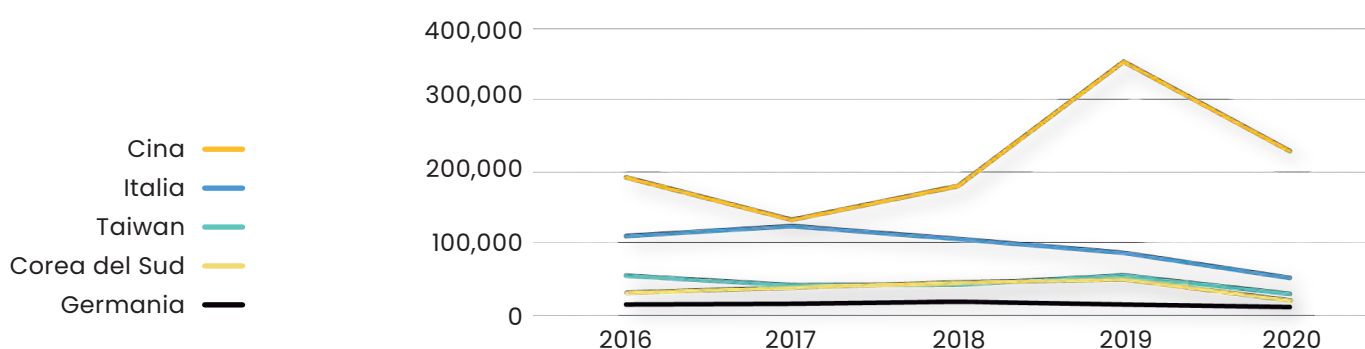


2016 Mercato mondiale Export **440.641**
2020 Mercato mondiale Export **367.627**

Quote di mercato dei principali esportatori di macchine per calzature 2016 -2020



Trend esportazioni di macchine calzature 2016/ 2020
(000 €)



		2016	2017	2018	2019	2020
	Cina	191.894	132.858	180.090	353.389	228.398
	Italia	109.489	123.347	105.947	86.268	51.076
	Taiwan	54.404	41.681	42.026	54.844	29.222
	Corea del Sud	30.998	38.743	44.876	49.688	20.143
	Germania	14.687	16.281	18.742	15.150	11.260

BENCHMARKING MACCHINE CALZATURE

Sistema Paese Vs competitor export ITA



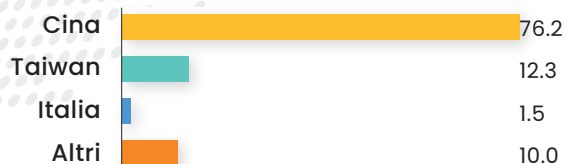
**IMPORT
MACCHINE 2020
000€**

**IMPORT NAZIONE
% SU TOTALE**

VIETNAM



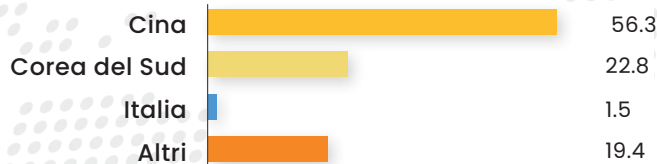
124.950



INDONESIA



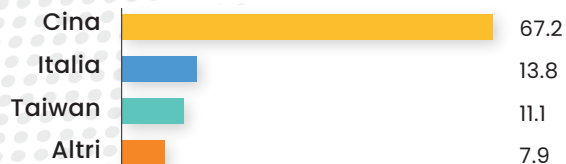
38.007



INDIA



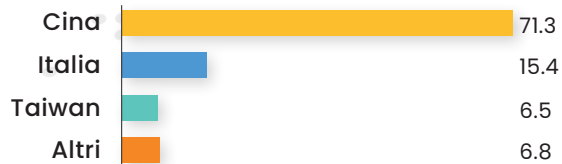
15.053



BANGLADESH



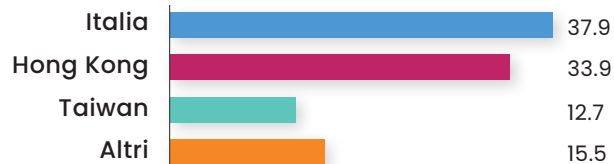
8.907



CINA



8.445





IMPORT MACCHINE 2020 000€

IMPORT NAZIONE % SU TOTALE

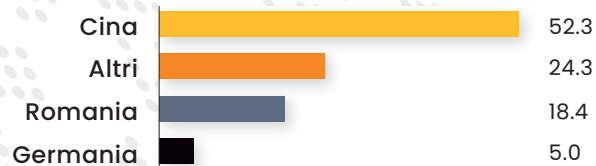
MALESIA

8.359



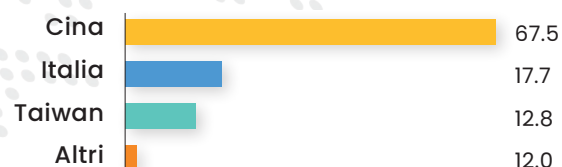
ITALIA

7.408



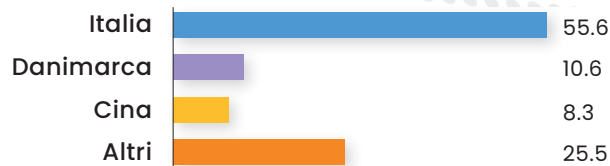
TURCHIA

6.506



PORTOGALLO

6.400



FRANCIA

6.079



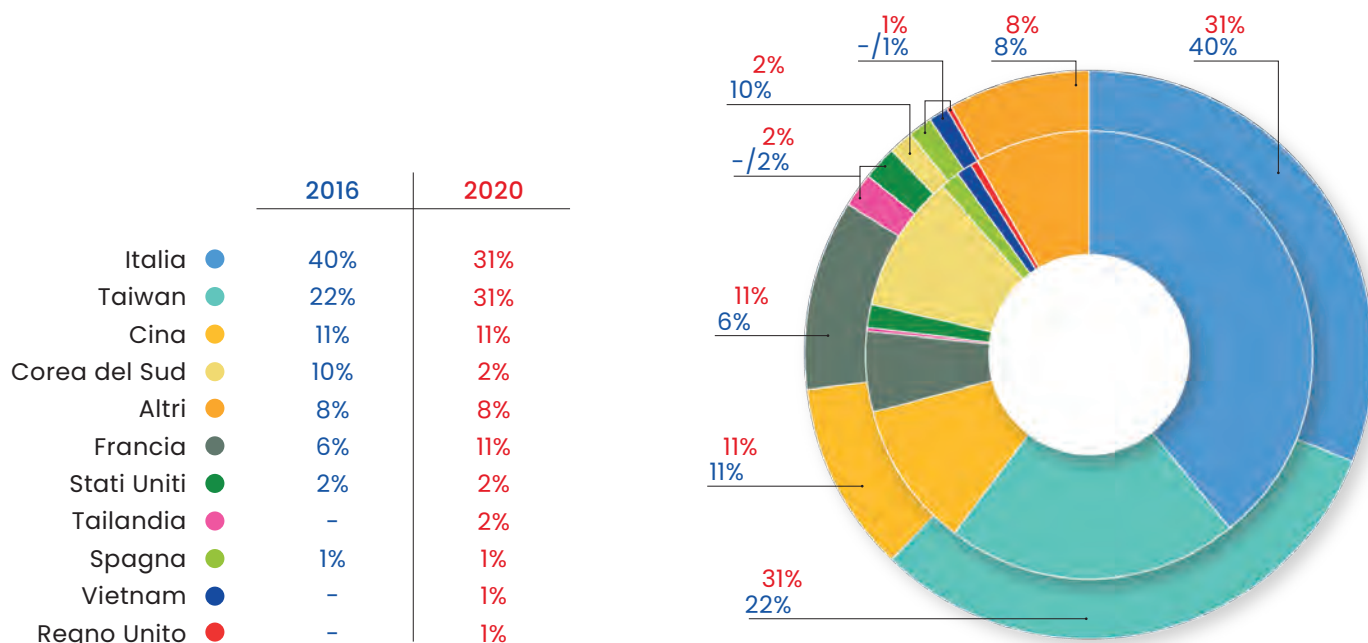


MACCHINE PER PELLETERIA

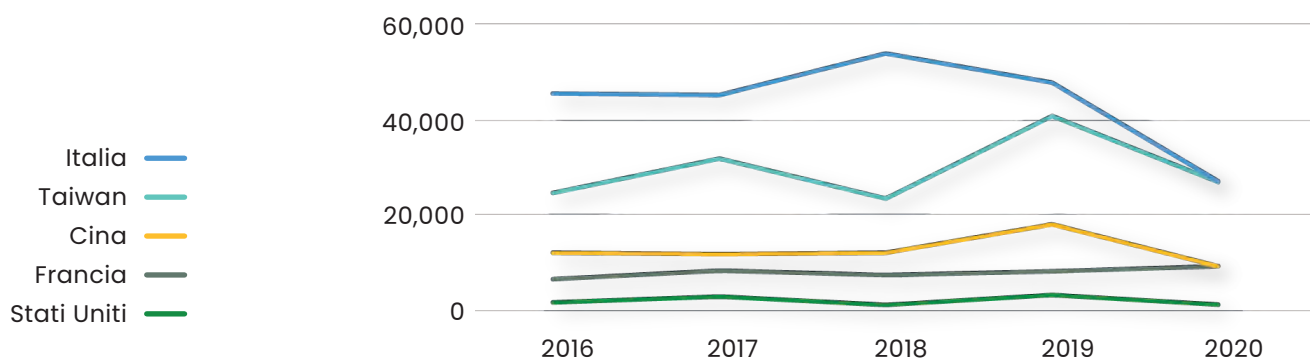


2016 Mercato mondiale Export **113.844**
2020 Mercato mondiale Export **86.147**

Quote di mercato dei principali esportatori di macchine per pelletteria 2016/ 2020



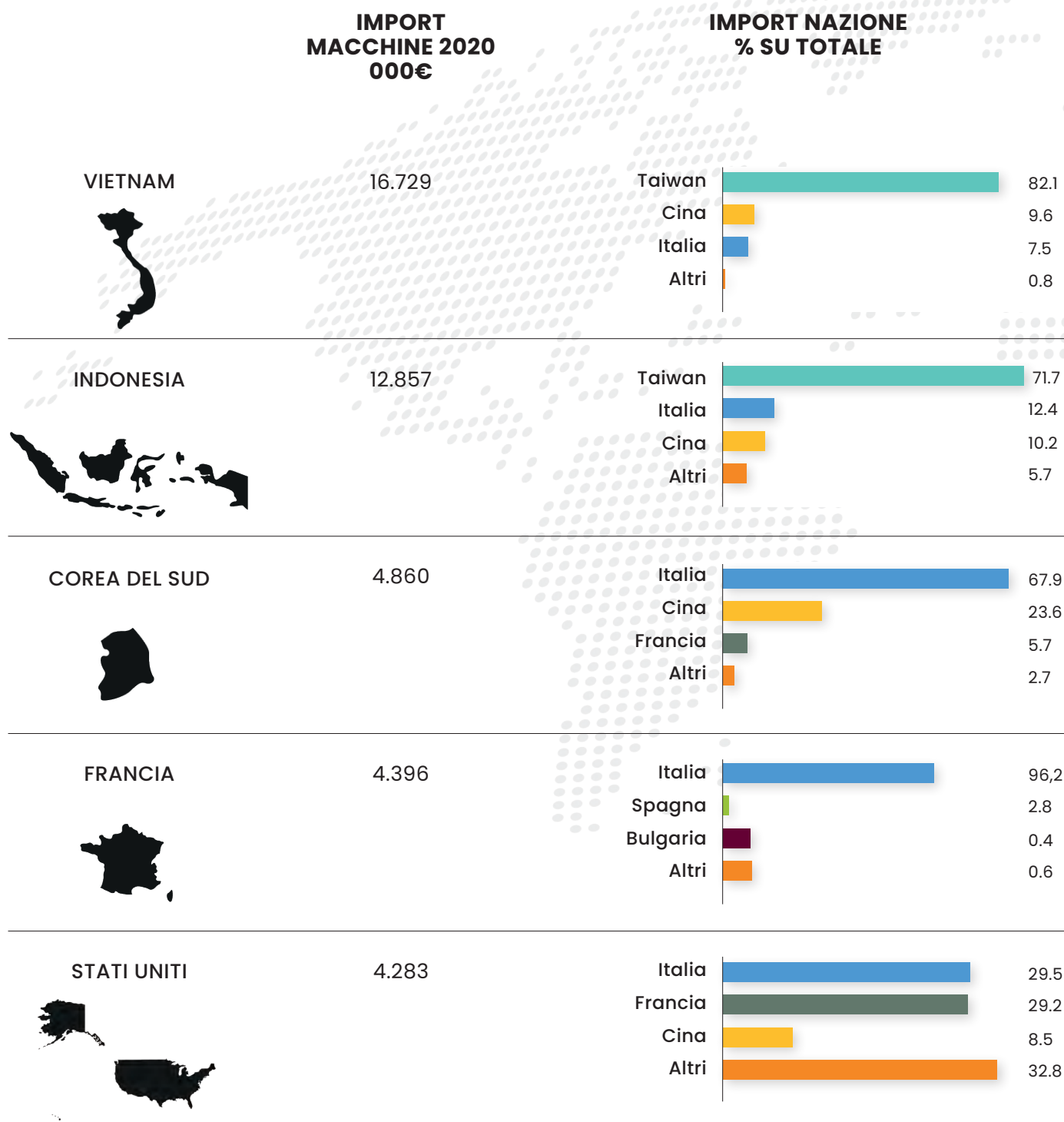
Trend esportazioni di macchine pelletteria 2016/ 2020
(000 €)



		2016	2017	2018	2019	2020
●	Italia	45.242	44.944	53.704	47.548	27.006
●	Taiwan	24.574	31.644	23.352	40.616	26.751
●	Cina	12.082	11.916	12.165	18.074	9.330
●	Francia	6.552	8.362	7.401	8.242	9.251
●	Stati Uniti	2.029	3.218	1.554	3.614	1.567

BENCHMARKING MACCHINE PELLETTERIA

Sistema Paese Vs competitor export ITA



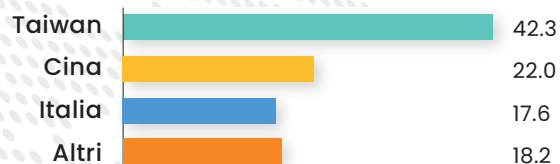


IMPORT MACCHINE 2020 000€

IMPORT NAZIONE % SU TOTALE

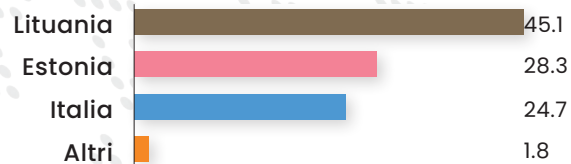
INDIA

3.302



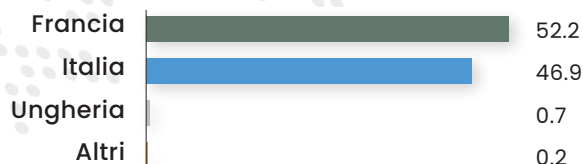
RUSSIA

2.001



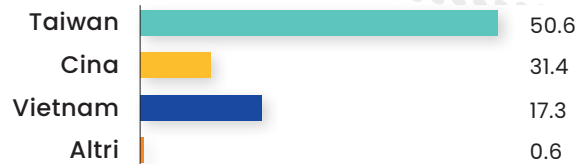
SLOVACCHIA

1.531



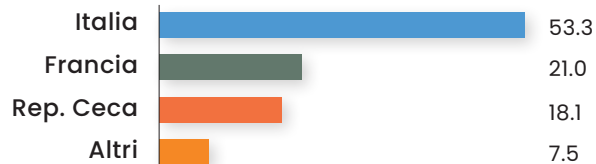
CAMBOGIA

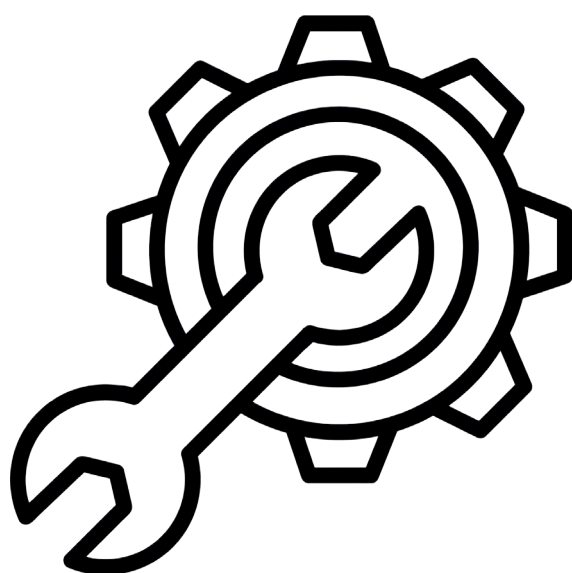
1.126



POLONIA

1.061



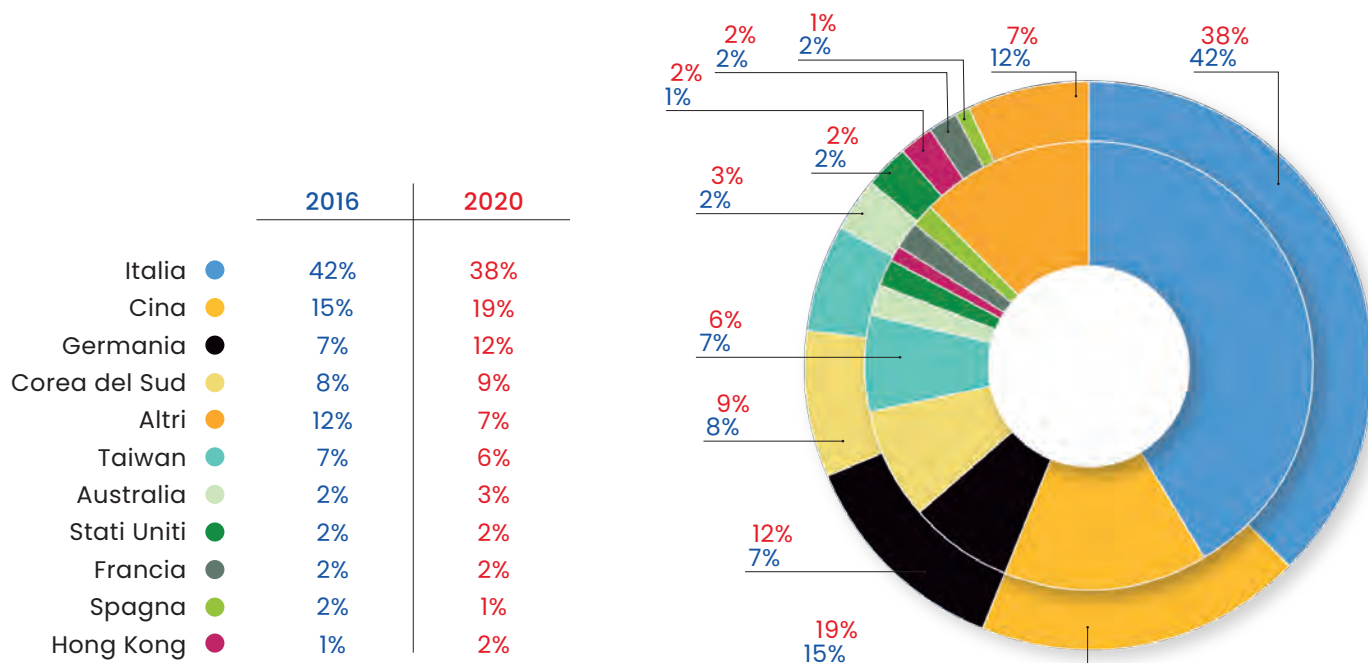


RICAMBI E MANUTENZIONE

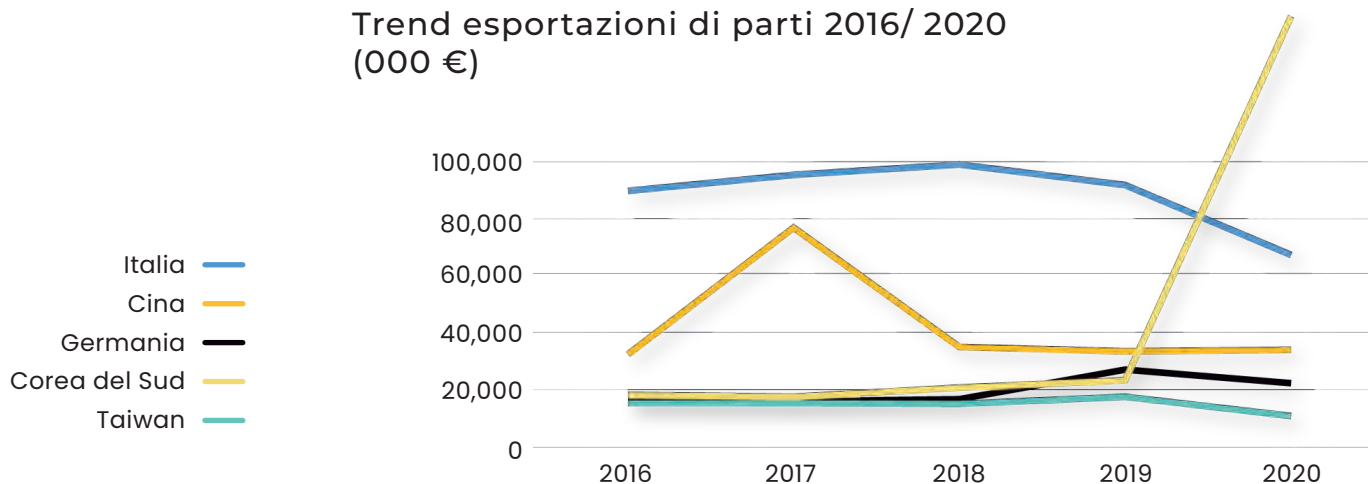


2016 Mercato mondiale Export **214.765**
2020 Mercato mondiale Export **177.127**

Quote di mercato dei principali esportatori di parti
2016/ 2020



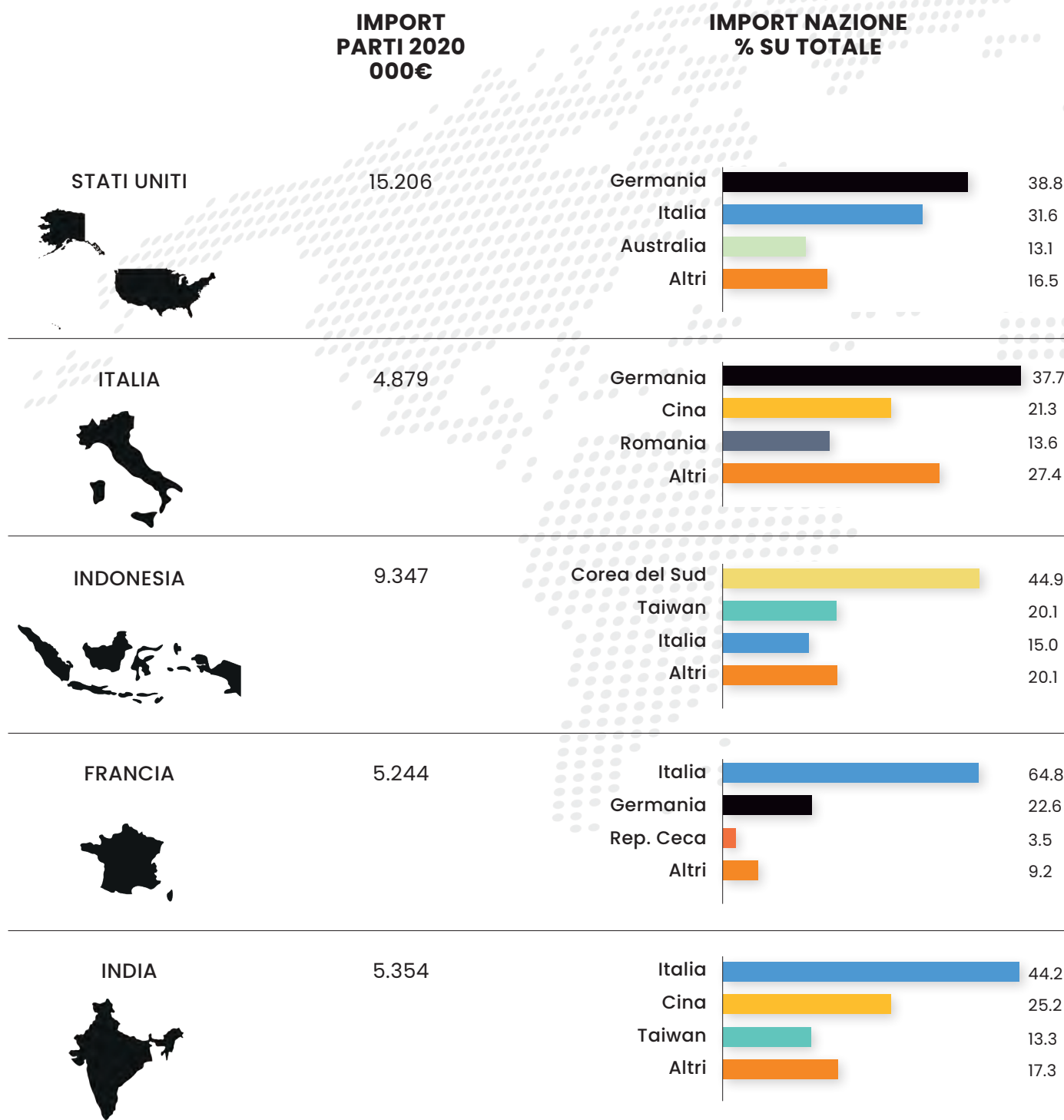
Trend esportazioni di parti 2016/ 2020
(000 €)



		2016	2017	2018	2019	2020
●	Italia	89.192	94.864	98.512	91.421	66.873
●	Cina	31.451	75.743	34.043	32.489	32.948
●	Germania	15.973	15.473	16.099	26.533	21.823
●	Corea del Sud	17.682	17.051	20.191	22.829	150.108
●	Taiwan	15.120	15.196	14.889	17.397	10.675

BENCHMARKING RICAMBI E MANUTENZIONE

Sistema Paese Vs competitor export ITA



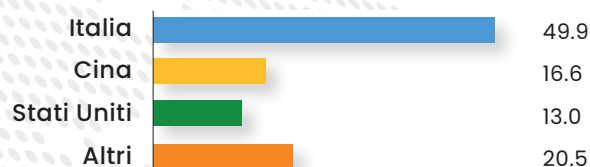


IMPORT MACCHINE 2020 000€

IMPORT NAZIONE % SU TOTALE

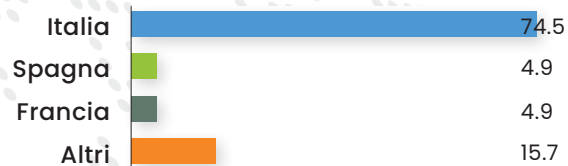
REP. DOMINICANA

621



PORTOGALLO

2.383



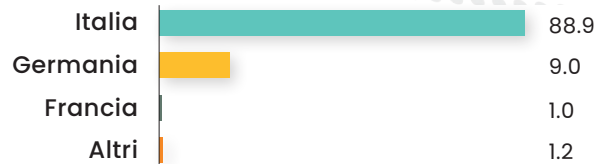
MESSICO

8.971



TUNISIA

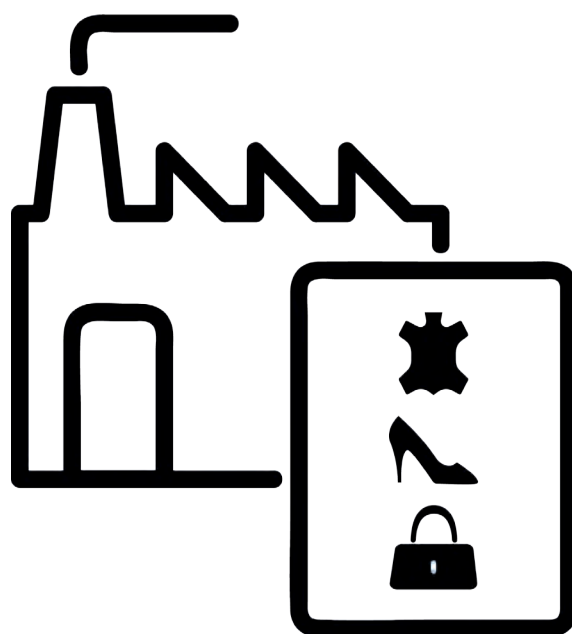
4.759



CINA

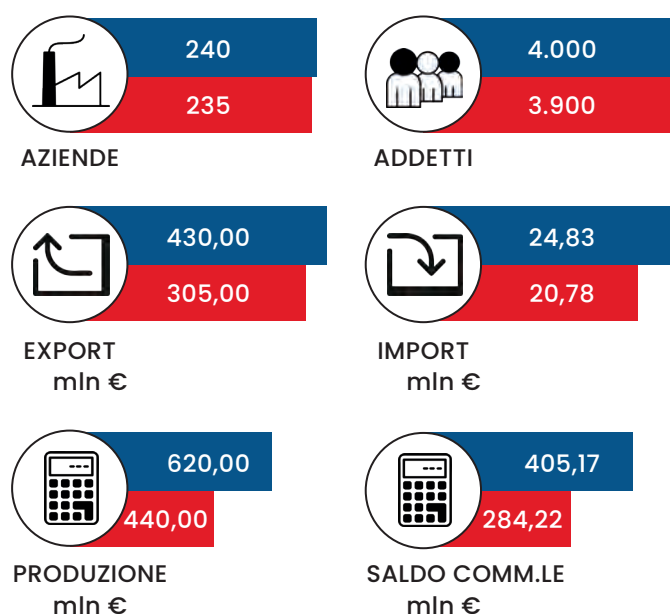
13.639



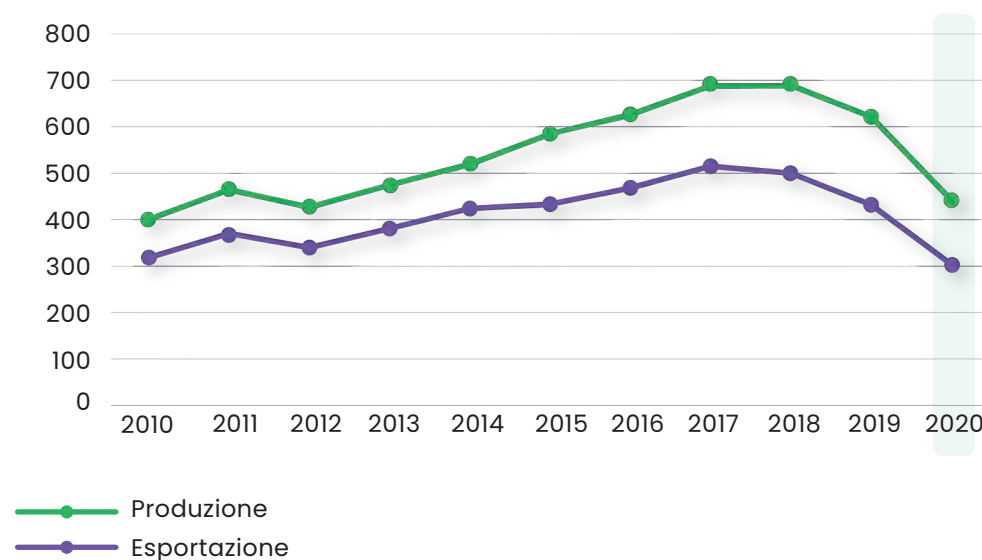


L'INDUSTRIA ITALIANA DELLE MACCHINE PER CONCERIA, CALZATURE E PELLETTERIA

2019 ● 2020 ●



Andamento settore italiano macchine per conceria, calzature, pelletteria e ricambi (€)



EXPORT MACCHINE PER CONCERIA	-28,94%
EXPORT MACCHINE PER CALZATURE	-40,93%
EXPORT MACCHINE PER PELLETTERIA	-43,33%
EXPORT PARTI DI RICAMBIO	-27,02%



EXPORT MACCHINE PER CONCIERIA -28,94%

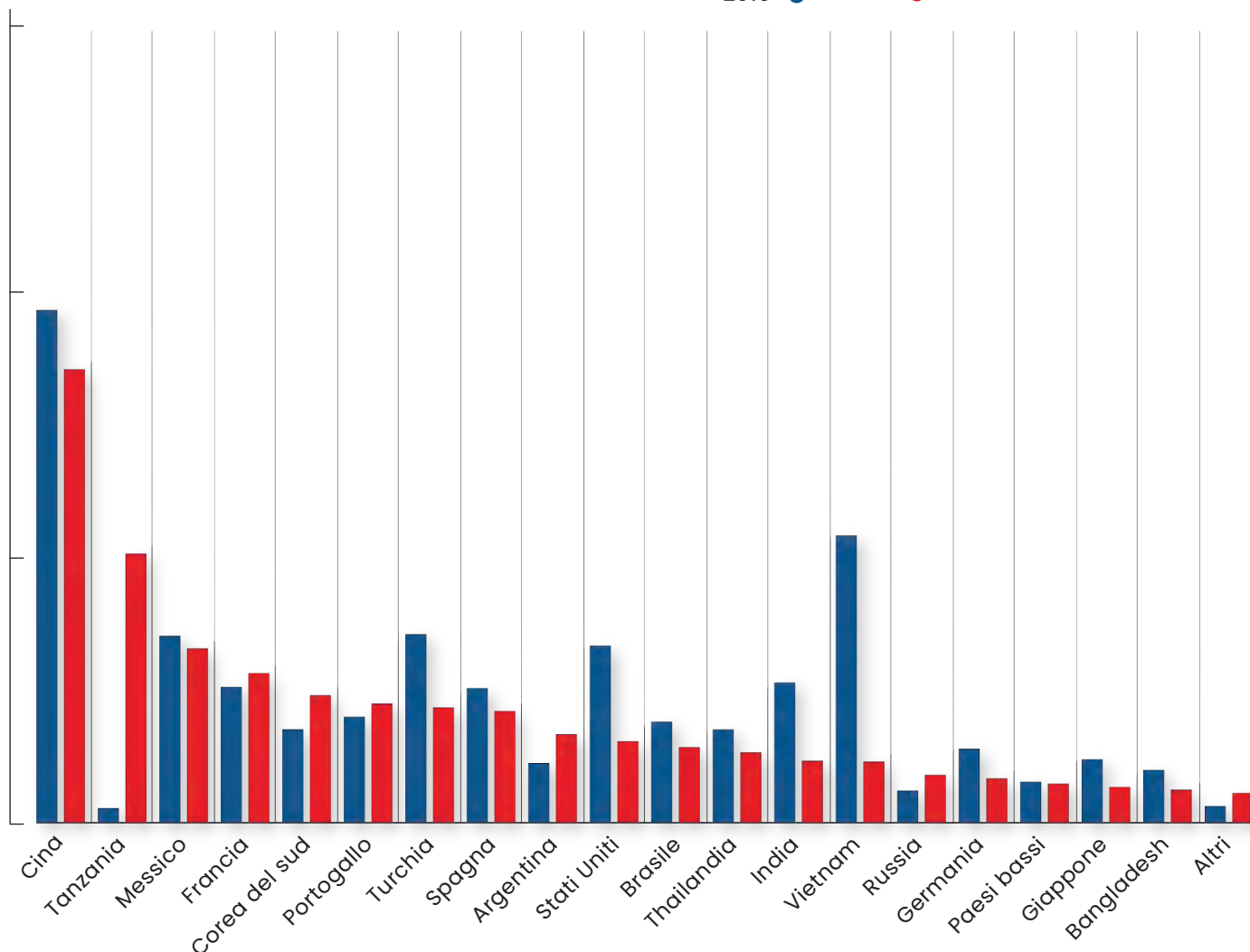
Destinazione dell'export di macchine per conceria

	Valore (mln €)	%	Variazione % Gennaio-Dicembre 2020/2019
Asia	34,65	36,72	-41,89
Europa	29,05	30,79	-20,71
Africa	12,56	13,31	+15,54
C.N. America	9,3	9,93	-32,19
Sud America	7,79	8,25	-15,93
Oceania	0,94	1,00	-63,22
TOTALE	94,36	100,00	-28,94

TOP 20 mercati

Max valore 20 mln€

2019 ● 2020 ●





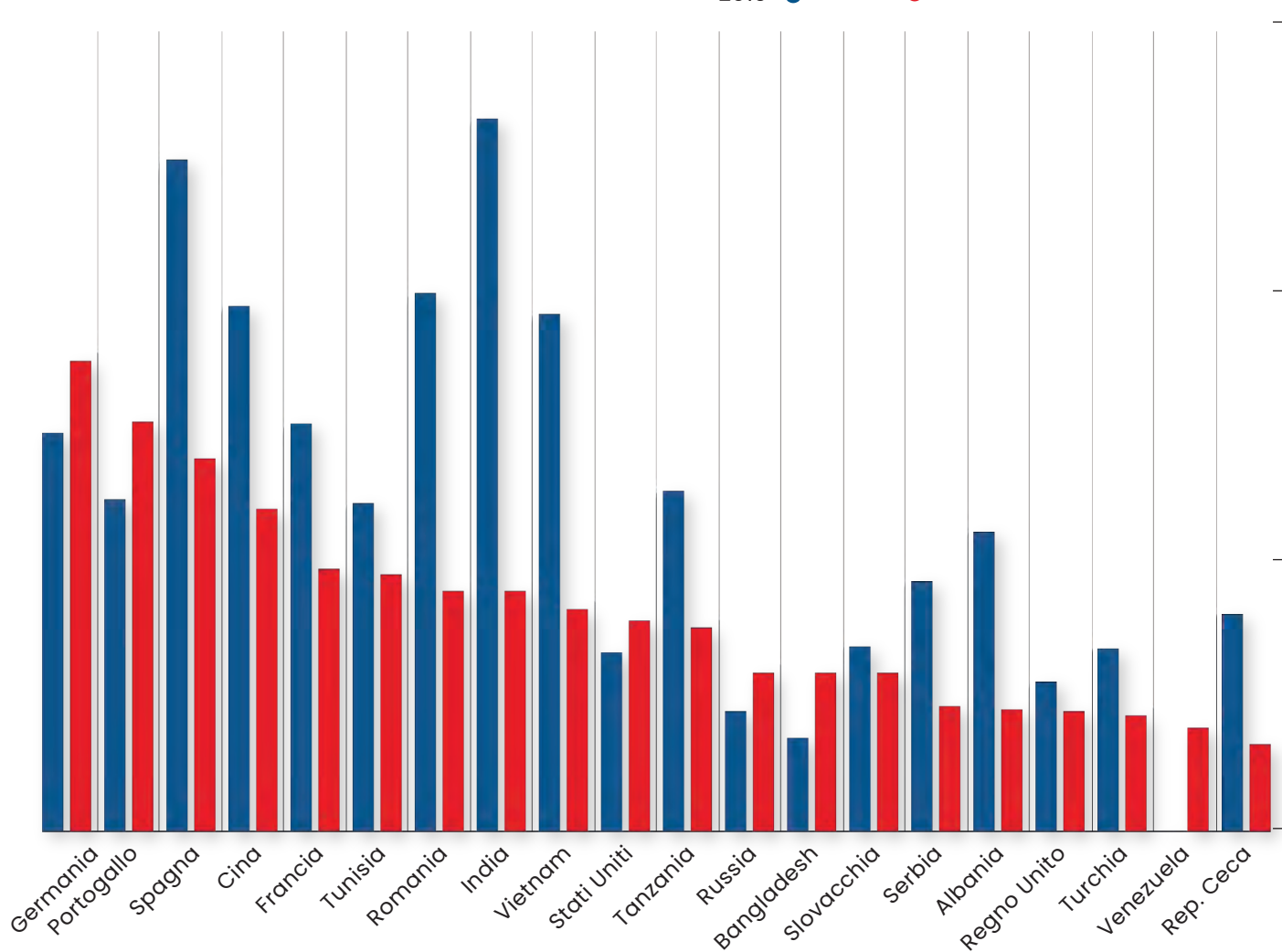
EXPORT MACCHINE PER CALZATURE -40,93%

Destinazione dell'export di macchine per calzature tradizionali

	Valore (mln €)	%	Variazione % Gennaio-Dicembre 2020/2019
Asia	11,76	23,08	-54,02
Europa	27,47	53,91	-38,43
Africa	6,27	12,30	- 22,55
C. N. America	2,84	5,57	-31,72
Sud America	1,92	3,77	-13,29
Oceania	0,70	1,37	-56,52
TOTALE	50,96	100,00	-40,93

TOP 20 mercati

2019 ● 2020 ● Max valore 4 mln€





EXPORT MACCHINE PER PELLETTERIA -43,33%

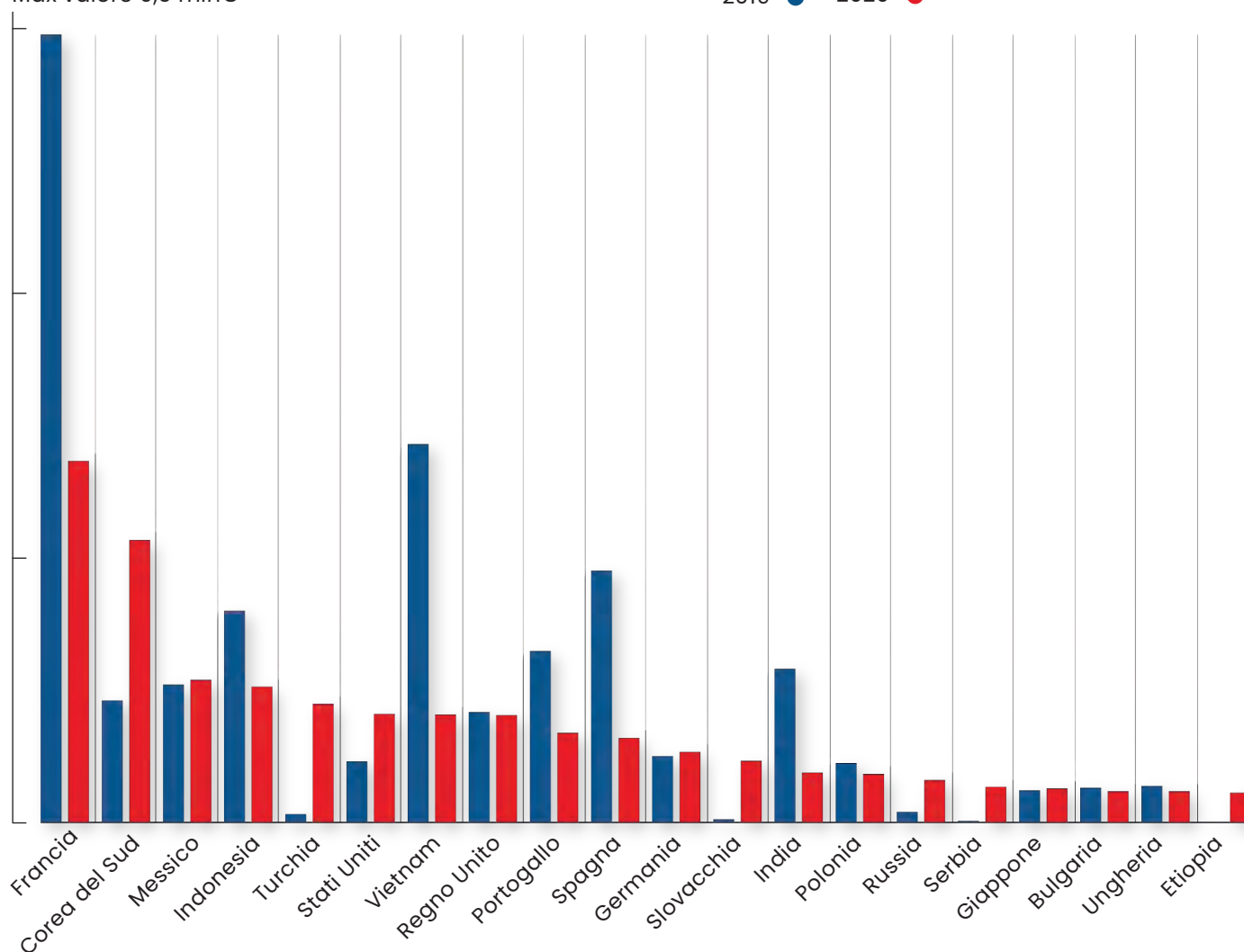
Destinazione dell'export di macchine per pelletteria

	Valore (mln €)	%	Variazione % Gennaio-Dicembre 2020/2019
Europa	14,36	53,30	-41,89
Asia	7,91	29,36	-46,77
Africa	0,68	2,52	- 82,24
Sud America	0,85	3,16	-71,37
C. N. America	3,03	11,25	18,33
Oceania	0,11	0,41	n. d.
TOTALE	26,94	100,00	-43,33

TOP 20 mercati

Max valore 9,5 mln€

2019 ● 2020 ●





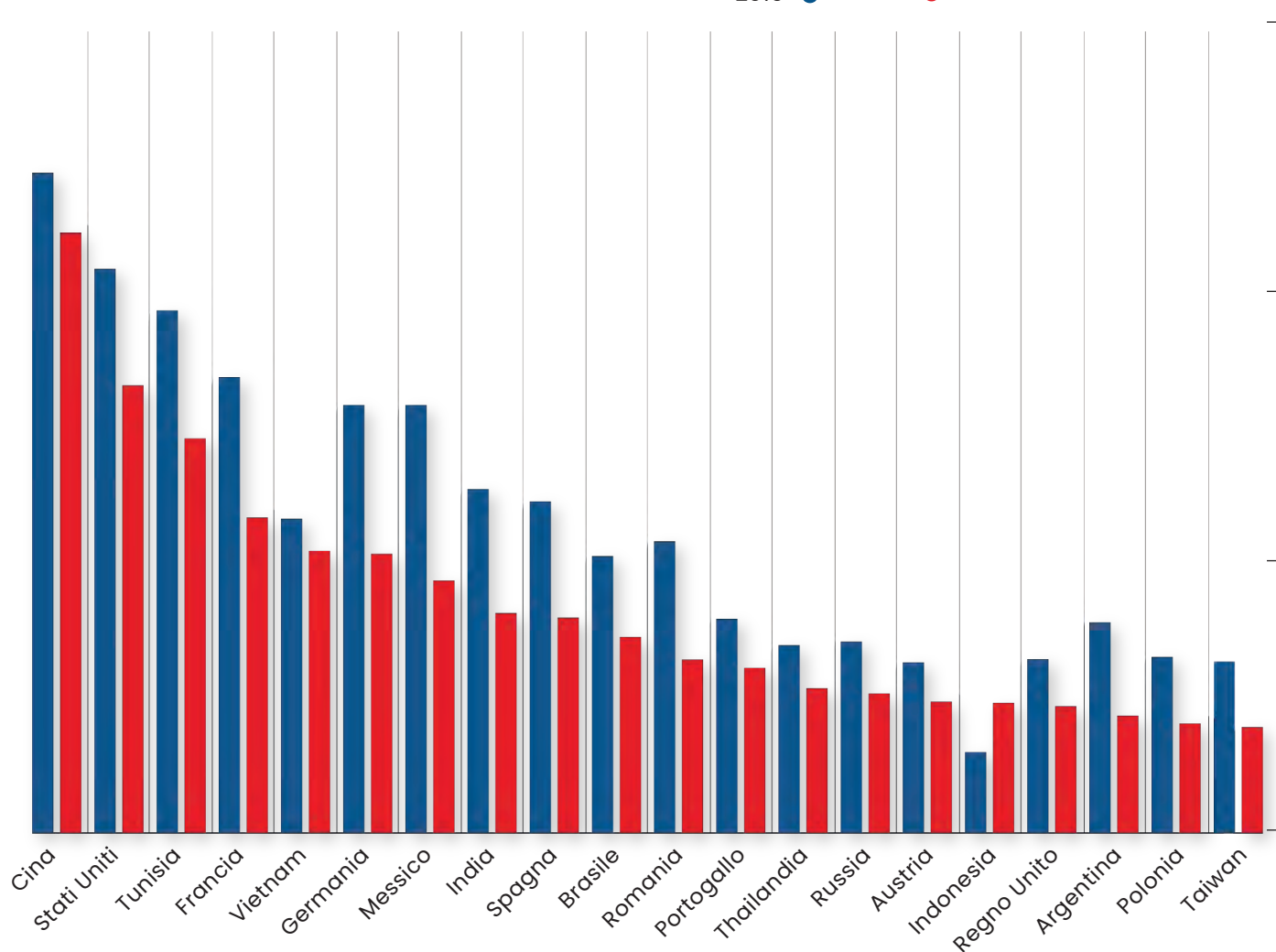
EXPORT PARTI DI RICAMBIO -27,02%

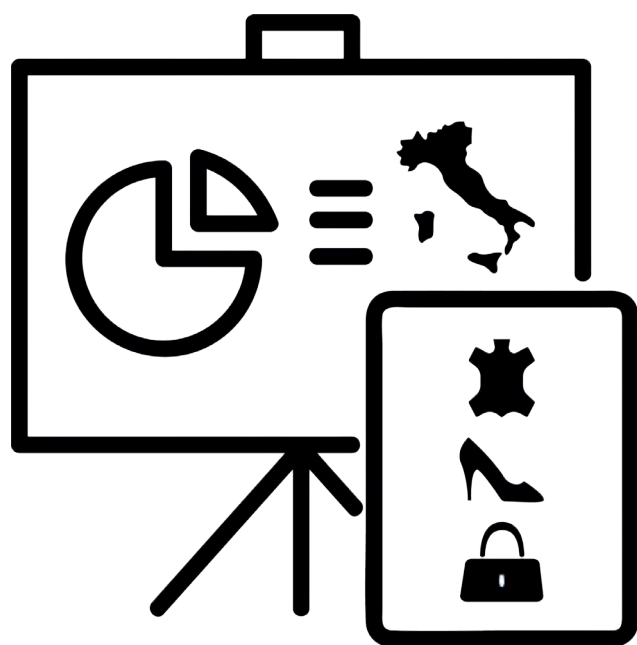
Destinazione dell'export di parti di ricambio

	Valore (mln €)	%	Variazione % Gennaio-Dicembre 2020/2019
Asia	19,62	29,41	-17,19
Europa	25,54	32,28	-31,37
C. N. America	7,96	11,93	- 30,64
Africa	7,19	10,77	-27,11
Sud America	5,49	8,23	-34,30
Oceania	0,96	1,38	13,27
TOTALE	66,72	100,00	-27,02

TOP 20 mercati

2019 ● 2020 ● Max valore 10 mln€

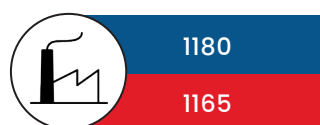




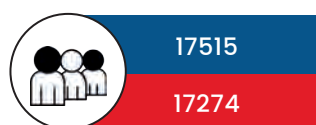


QUADRO DELL'INDUSTRIA CONCIARIA ITALIANA

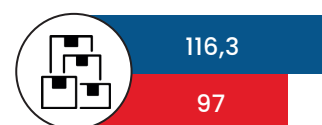
2019 ● 2020 ●



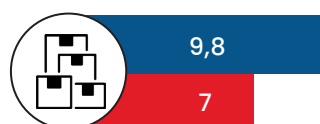
AZIENDE



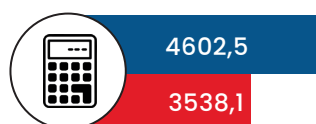
ADDETTI



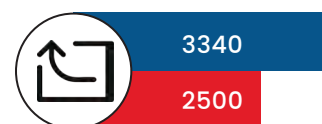
PRODUZIONE (volume)
mln mq pelli finite



PRODUZIONE (volume)
tonnellate cuoio da suola



PRODUZIONE (valore)
mln €



EXPORT (volume)
mln €

Produzione italiana per tipologia

Volume (mln mq) Valore (mln €)



BOVINE



VITELLINE



OVINE

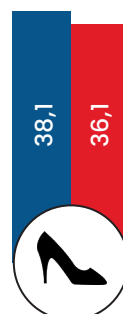


CAPRINE

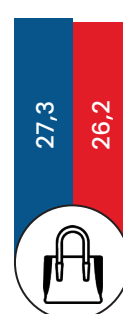


ALTRI ANIMALI

Produzione italiana per destinazione d'uso %



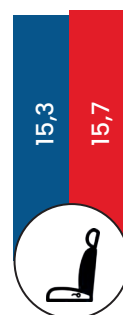
CALZATURA



PELLETTERIA



ARREDAMENTO



SELLERIA



ABBIGLIAMENTO
E GUANTI

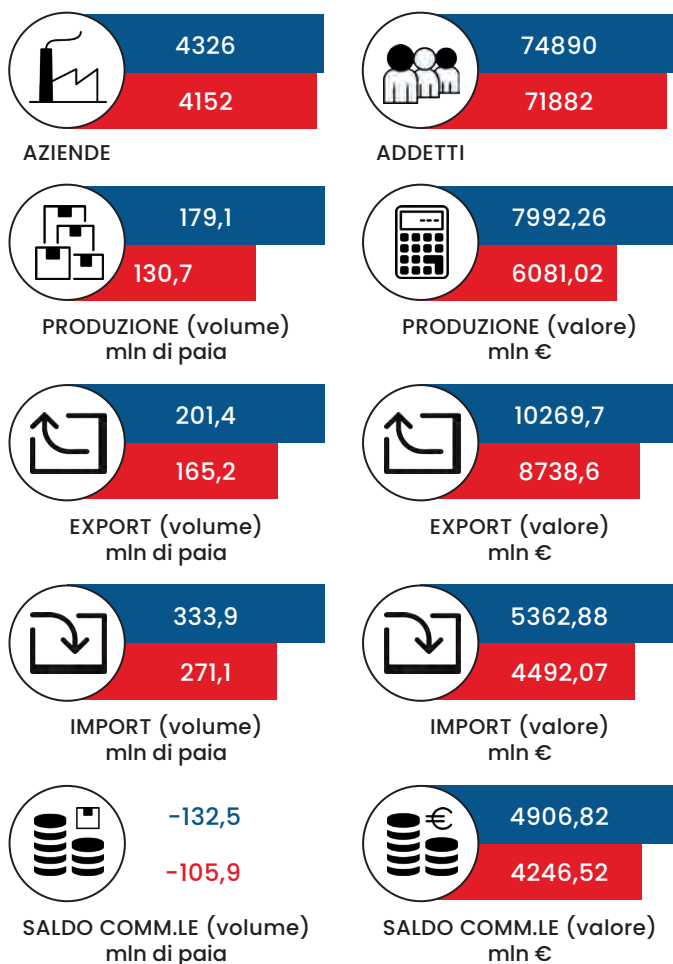


ALTRO

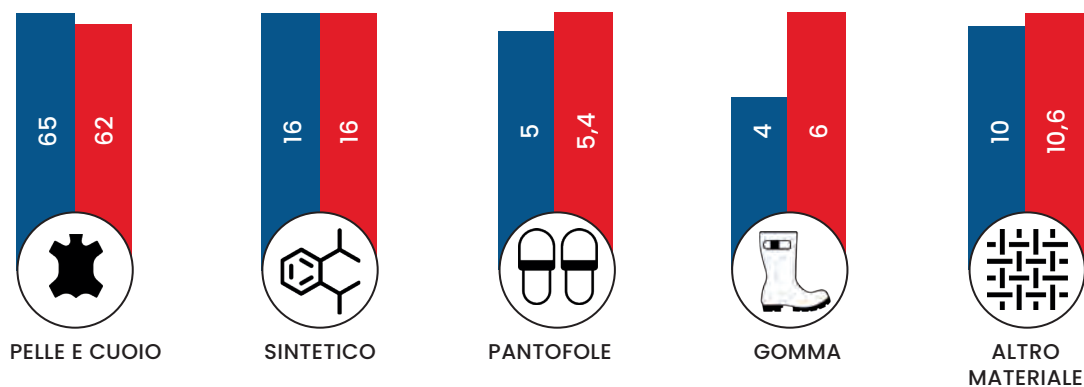


QUADRO DELL'INDUSTRIA CALZATURIERA ITALIANA

2019 ● 2020 ●



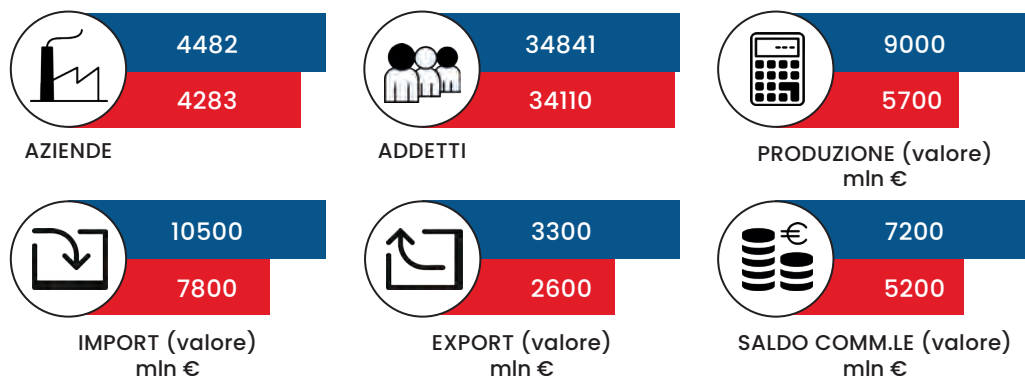
Produzione italiana per destinazione d'uso %



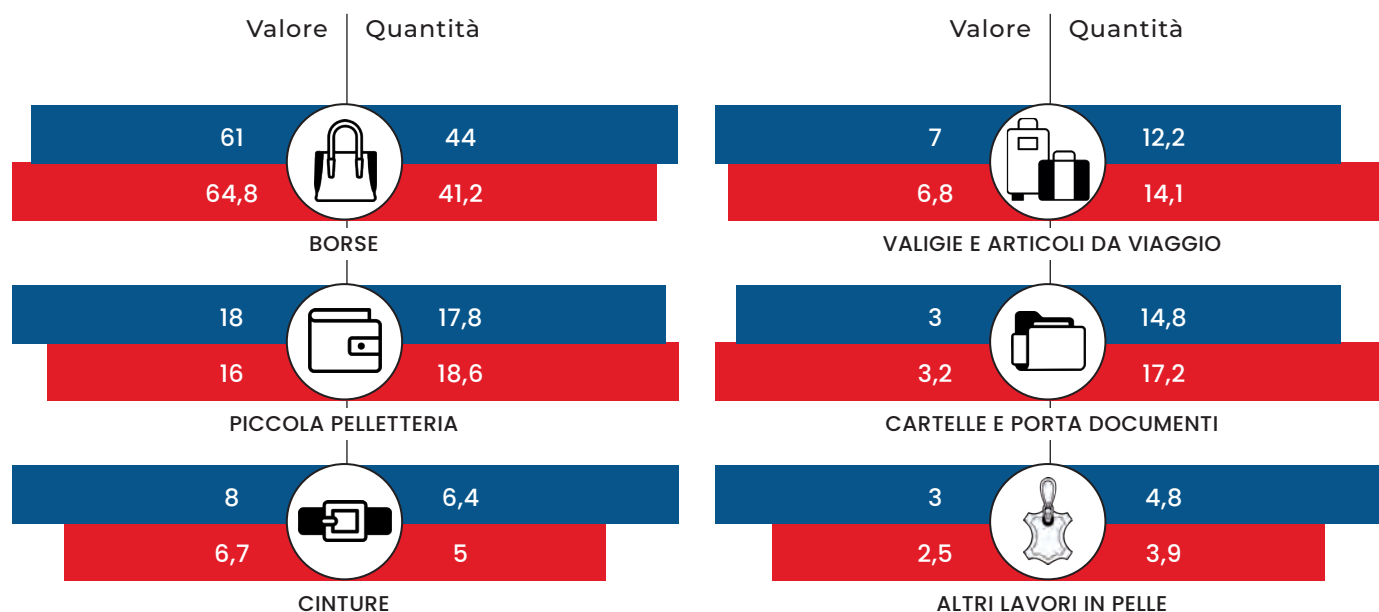


QUADRO DELL'INDUSTRIA PELETTIERA ITALIANA

2019 ● 2020 ●



Export italiano di pelletteria suddiviso per tipologia di prodotto (%)



Export italiano di pelletteria suddiviso per materiale d'uso (%)

