

ANIMA CONFINDUSTRIA MECCANICA VARIA

ITALIAN TECHNOLOGY FOR THE FOOD PROCESSING INDUSTRY

Verona, 12th April 2024

Who is ANIMA?

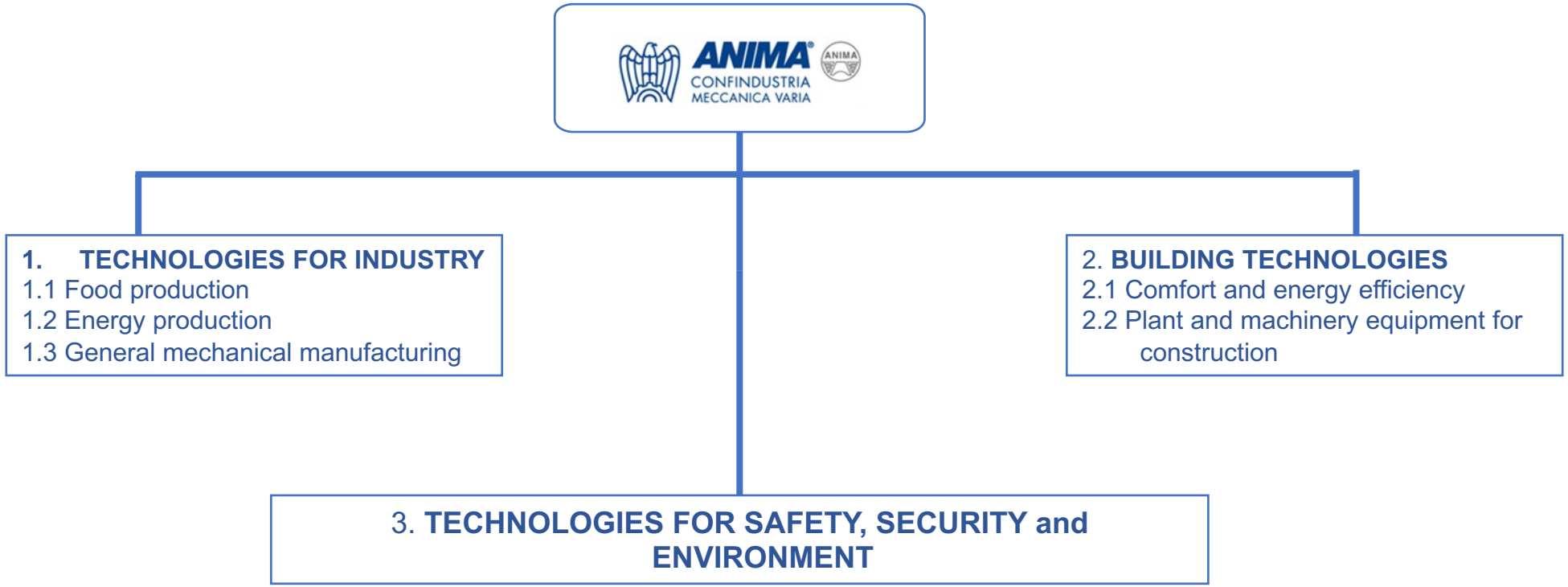
- ANIMA Federation was established in 1914 and represents the **mechanical and engineering industries** within Confindustria (Confederation of Italian Industries).

- **34 trade associations**, **representing 60** manufacturing sectors, join the Federation, and gather in the whole **1,000 member-companies employing about 220.000 units**.

- The mechanical and engineering sectors represented by ANIMA have a turnover of **56 billion euro, 58% of which from export.**

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ANIMA System



ANIMA ASSOCIATIONS

ANIMA sicurezza — Solutions and services for the secure storage of goods and values

ACISM — Italian Association of Meter Manufacturers

AISEM — Italian Association of Lifting, Elevation and Handling System Manufacturers

ANASTA — Italian Association of Welding, Cutting and Related Technology Companies

AQUA ITALIA — Italian Association of Water Treatment Equipment and Product Manufacturers

ASSOCATENE — Italian Association of manufacturers of vehicle chains

ASSOCLIMA — Italian Association of Air Treatment Equipment Manufacturers

ASSOFERMA — Italian Association of Lock, Hardware and Handle Manufacturers

ASSO FOOD TEC — Italian Association of Machinery and Plant Manufacturers for Food Production, Processing & Preservation

ASSOGRIGLIATI — Italian Association of Electro-welded and Pressed Steel Grating and Fencing Manufacturers

ASSOPOMPE — Italian Association of Pump Manufacturers

ASSO SEGNALETICA — Italian Association of Road Traffic Sign Manufacturers and Distributors

Assotermica — Heating System, Component and Equipment Manufacturers' Association

AVR — Italian Association of Valve and Fittings Manufacturers

CIADI — Italian Association of Noise Reduction Material and Equipment Manufacturer

CICOF — Italian committee of industrial furnace manufacturers

CLIMGAS — Gas-fired Air Conditioning Appliance Manufacturers' and Distributors' Association

COMPO — Italian Association of Compressor, Pump and Compressed Air Treatment Equipment Manufacturers

FIAC — Italian Association of Cutlery, Flatware, Hollowware and Cookware Manufacturers

GENERAZIONE DISTRIBUITA — Italian Association of Manufactures and Distributors of Engines, Components and Generating Sets

ITALCOGEN — Italian Association of Manufacturers and Distributors of Cogeneration Systems

UAMI — Italian Association of Industrial Plant Erection and Maintenance Contractors

ucc — Italian Association of Boiler and Pressure Vessel Manufacturers

UCIF — Italian surface treatment equipment manufacturers association

UCIR — Italian Association of Castor and Wheel Manufactures

UCoMESA — Italian Association of Construction Equipment Manufacturers

UCRS — Italian Association of Gas Regulators Manufacturers

UCT — Turbine Manufacturers Association

UIDA — Italian Association of Environmental Technology Suppliers

UMAN — Italian Association of Firefighting Equipment Manufacturers

UNAC — Power-operated gate and door automatic entry and system manufacturers

ANIMA is part of ORGALIM

National Associations

Austria
FEEI
FMMI

Belgium
AGORIA

Bulgaria
BASSEL

Croatia
Croatian Chamber of Economy
HUP

Denmark
DI

Finland
Federation of Finnish Technology Industries

France
FIEEC
FIM

Germany
VDMA
WSM
ZVEI

Great Britain
BEAMA
EAMA
GAMBICA

Hungary
MAGEOSZ

Ireland
IEEF

Italy
ANIE
ANIMA

Latvia
MASOC

Lithuania
LINPRA

Luxembourg
ILTM

The Netherlands
FME
METAALUNIE

Norway
Norsk Industri

Poland
PIGE

Portugal
AIMMAP
ANEME

Slovenia
GZS-MPIA

Spain
CONFEMETAL
SERCOBE

Switzerland
SWISSMEM

Sweden
TEKNIKFÖRETAGEN

Sector Associations

AFECOR
CEIR
EFCEM
EGMF
EURALARM
EUROPUMP
PNEUROP



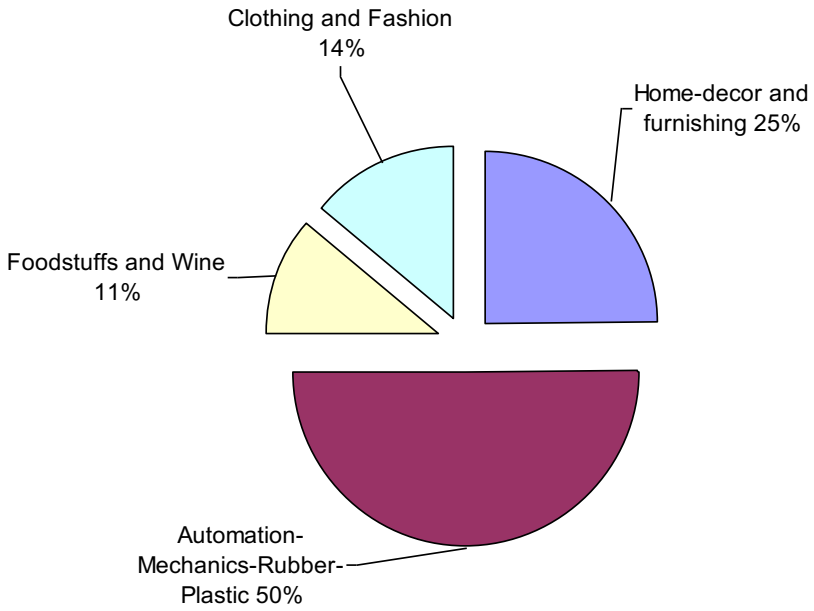
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THE BEST OF THE MADE IN ITALY

- The Made in Italy is renowned world-wide. The Italian export takes advantage from some well reputed food, fashion and furniture products that first succeeded in imposing themselves on the international market.

- Nowadays, among the Italian world famous industries we should put the mechanical and engineering sectors which includes metal products, machineries and mechanical devices mostly represented by Anima Federation.

EXPORT MADE IN ITALY



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Performance 2022 - Forecast 2023

- Export is a key element for ANIMA technologies' growth, representing more than 58% of the 2023 turnover by ANIMA Confidnustria.
- Investment in new technologies and Industry 4.0 solutions have been strongly increased starting from 2016 and 2017 (double digit per year) up to 2023 thanks to dedicated Government incentives to renovate Factories' plants with more efficient and interconnected production technologies.

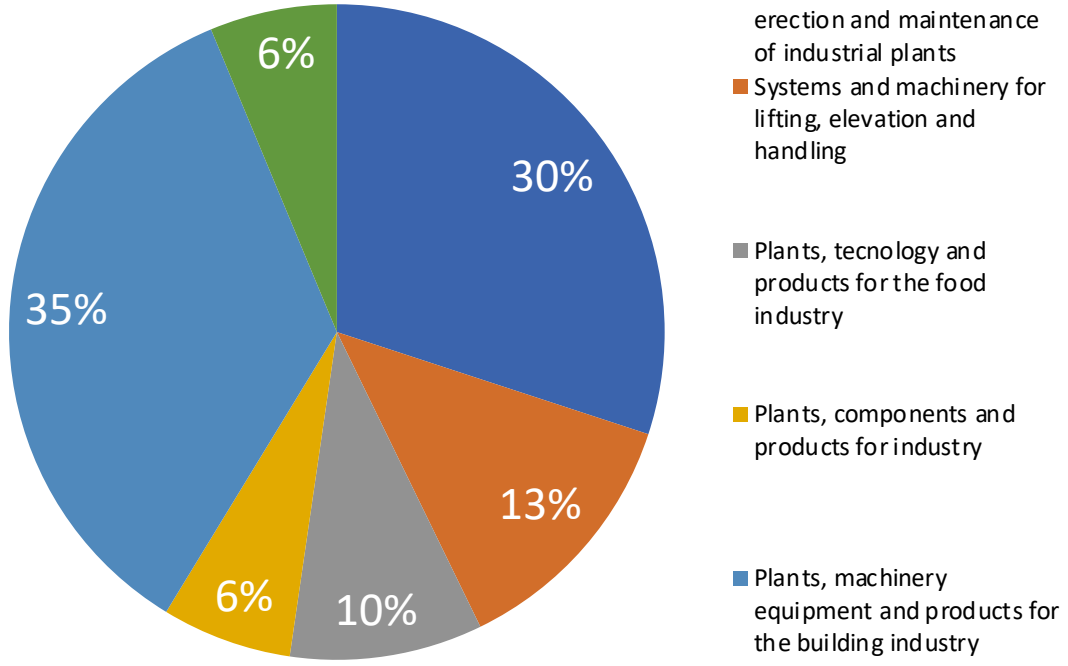
PRODUCTION	**56,1 Bn €**	**55,5 Bn €**	**+5,8%**	**-1,0%**
EXPORT	**32,2 Bn €**	**32,1 Bn €**	**+7,0%**	**-0,2%**
INVESTMENTS	**1,3 Bn €**	**1,3 Bn €**	**+3,5%**	**+0.2%**
EMPLOYMENT	**221,626**	**221,720**	**+0.6%**	**+0.0%**

SOURCE: ANIMA Economic Department –Istat data processing
*estimates 2023

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TOTAL TURNOVER ACCORDING TO PRODUCT DIVISION

- Value of the production considered in the previous slide divided into the macro-areas represented by ANIMA.



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Food Technology Sector: ASSOFOODTEC/ANIMA

Assofoodtec is **the national trade association** that represents and supports the Machinery and Plant Manufacturers for Food Production, Processing and Preservation.

Food Slicers, Mincing Machines and Similar Equipment Manufacturers
ASSOCOLD – Refrigeration Technologies Manufacturers
UCIMAC – Espresso Coffee Machines Manufacturers
COMACA – Meat Processing Equipment Manufacturers
UCMA – Food Processing Equipment Manufacturers
Vending Technologies Manufacturers

ASSOFOODTEC counts more than **120 member companies** from all over the country, including the industry leaders. The highest concentration of members lies in the Emilia Romagna, Lombardy, Veneto regions.

The association represents an industrial branch with a turnover of around **5 Billion euro**, of which 66% is destined for foreign markets. Thanks to the above estimate, Italy is indeed in the first place among exporting countries worldwide.

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FOOD TECHNOLOGIES:
Plants, technology and products for food industry

- Milling machines, bakery, confectionery and pizza making machines, pasta and extruded foodstuff machines
- Espresso coffee machines and bar equipment
- Slicers, meat slicers and other equipment for restaurants and hotels
- Industrial and commercial refrigeration equipment
- Meat processing equipment
- Flatware & Cookware

PRODUCTION
2022
5.3BN€
+3,2%

EXPORT 2022
3.5BN€
+4,3%

EMPLOYMENT 2022
23k
+0.2%

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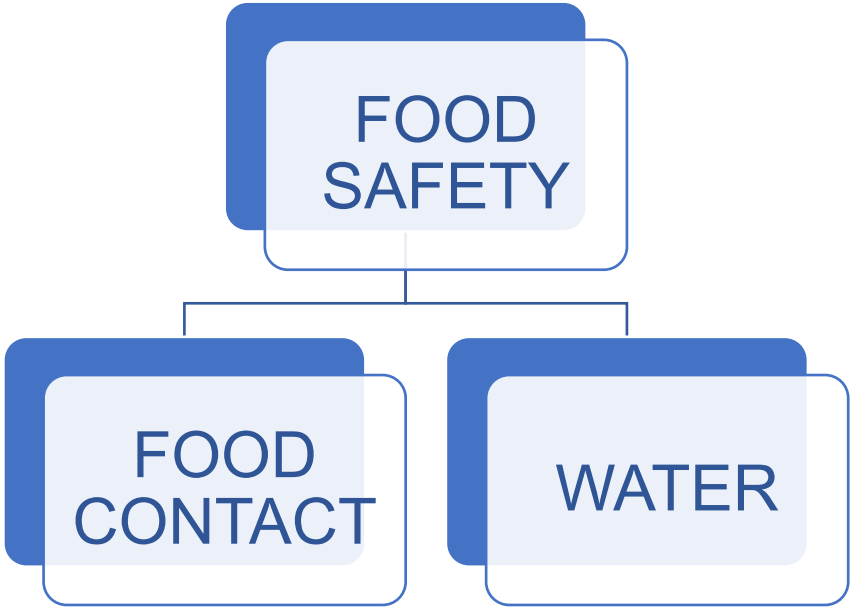
Export of ANIMA products to CHINA 2018-2023

Valori in milioni di euro	2018	2019	2020	2021	2022	2023	Δ% 23/22
Total	**1.018,4**	**1.093,5**	**1.217,5**	**1.639,5**	**1.217,8**	**1.277,3**	**4,9%**
Valves and taps	182,6	266,9	301,8	390,8	348,9	364,2	4,4%
Gas turbines	66,6	177,0	215,4	388,4	183,4	222,5	21,3%
Hydraulic pumps	171,3	135,7	159,2	195,9	148,9	163,3	9,7%
Aeraulic plants	47,4	48,7	54,4	125,8	41,0	72,2	75,9%
Boilers	38,2	47,6	57,8	67,1	41,3	70,3	70,1%
Equipment for thermal plants	125,9	95,2	75,8	76,4	71,7	54,8	-23,5%
Espresso coffee machines professional use	26,2	23,3	24,5	54,2	69,0	51,5	-25,4%
Machines and plants for lifting and transportation	96,4	71,5	67,3	80,0	56,1	44,9	-20,0%
Industrial furnaces	37,5	34,1	41,7	46,9	34,2	41,2	20,5%
Locks and hardware	29,2	32,3	40,3	61,9	53,3	40,8	-23,6%
Steam turbines	1,9	0,6	1,7	1,3	25,8	23,0	-11,0%
Internal combustion engines	20,9	12,0	41,3	29,1	12,6	18,9	50,4%
Welding automation and laser cut	31,0	22,4	24,5	22,8	30,0	16,4	-45,3%
Building, road, mining and similar machines	60,7	38,8	25,1	24,0	10,0	16,1	60,2%
Air compressors	15,9	24,2	15,6	18,2	16,5	15,6	-5,4%
Refrigerated compressors	12,1	8,1	9,4	10,0	11,8	12,5	6,7%
Housewares	10,8	9,7	9,1	10,2	18,1	10,0	-45,0%
Plants for surface finishing	11,5	10,5	12,9	8,4	8,7	9,8	12,2%
Machines and ovens for bakeries	5,9	5,9	4,5	7,6	7,1	9,1	28,9%
Safes	3,7	4,2	7,0	6,1	7,2	6,3	-13,4%
Machines and plants for pasta factories	0,9	2,9	8,6	2,6	4,6	3,3	-28,1%
Machines and plants for mills, feed mills and silos	1,6	3,5	1,7	1,9	3,6	2,6	[illegible]
Machines and plants for confectionery industry	1,0	5,5	1,0	1,3	1,7	2,1	24,6%
Meters	2,5	1,7	2,8	2,0	1,9	1,6	[illegible]
Machines and plants for fruit processing	9,1	3,3	6,2	0,5	1,7	1,2	[illegible]
Refrigerated display cabinets	0,8	0,5	0,9	1,0	0,6	1,1	78,4%
Trucks	5,2	4,8	5,3	3,6	4,4	1,0	[illegible]
Meat processing machines	1,0	1,8	0,8	1,1	0,7	0,6	-15,6%
Industrial shelvings	0,3	0,2	0,6	0,3	0,4	0,5	10,8%
Hydraulic turbines	0,1	0,5	0,1	0,0	2,4	0,0	-99,2%

FOOD SAFETY







AGRIFOOD ENERGY

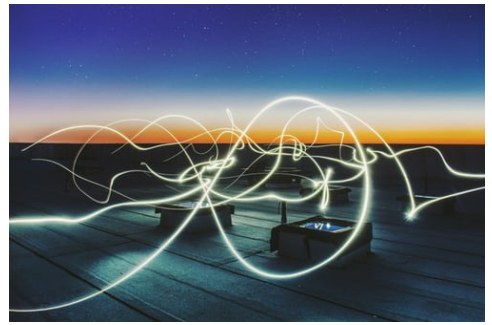
FARM

AGRICOLTURE COMPANY

ENERGY

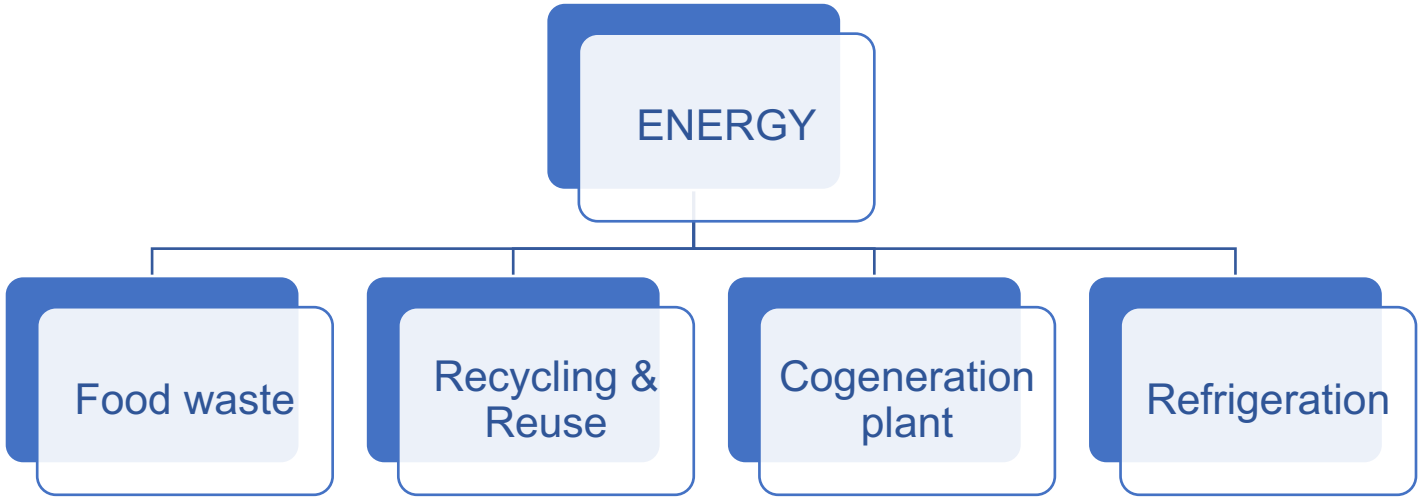






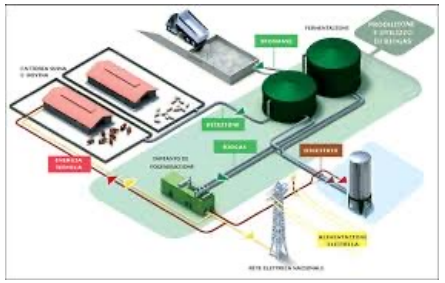
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AGRIFOOD ENERGY









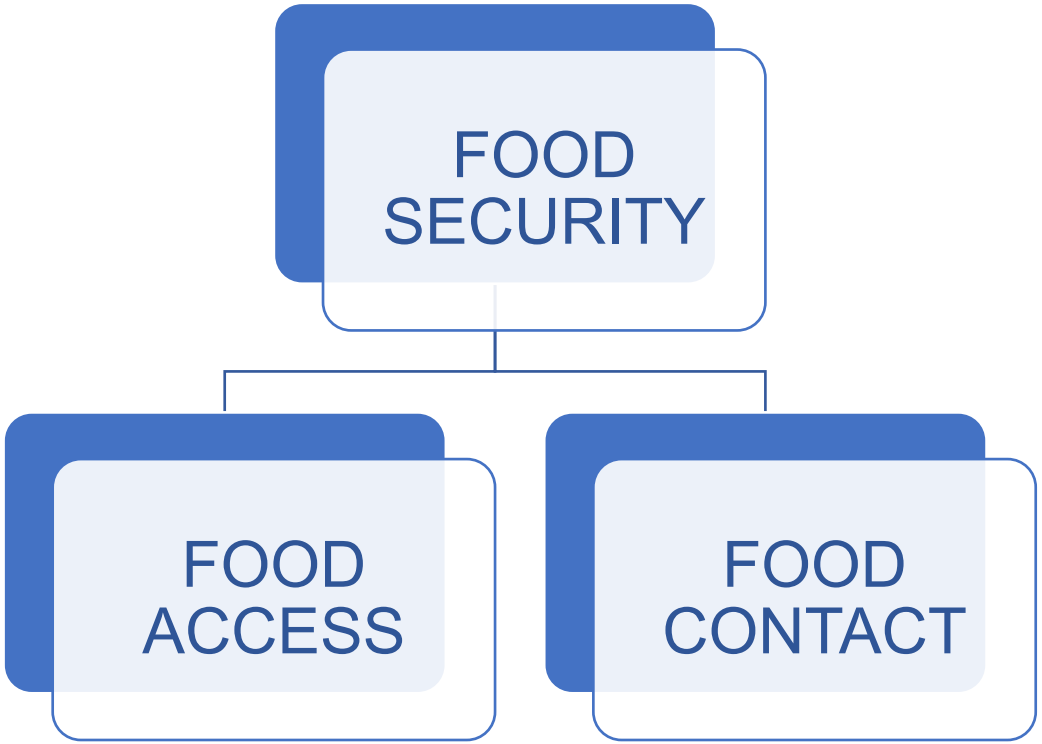


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FOOD SECURITY







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AGRIFOOD INNOVATION

From farm to farming company







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AGRIFOOD INNOVATION



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AGRIFOOD INNOVATION

ENERGY SELF-PRODUCTION AND INTRODUCTION OF TECHNOLOGIES IN FARMS

FOOD SAFETY

FOOD SECURITY

CAN BREAK THE FORCED CONDITION OF WORKING JUST FOR A «SELF-SUFFICIENCY FOOD OUTPUT» OFTEN COMMON IN COUNTRYSIDE COMMUNITIES

ECCESS OF PRODUCTION CAN BE TRANSFORMED INTO **HIGH VALUABLE FOOD SPECIALTIES GOOD FOR EXPORT**

FOOD WASTE REDUCTION

ALSO GOOD TO…

REDUCE INTOXICATIONS AND DISEASES THANKS TO A LOWER RISK OF FOOD CONTAMINATION OR DETERIORATION

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Refrigeration sector - Innovation case study 1

Digital processing and future farm 4.0

- Robotic lines for **the highest quality standards.**
- SAP HANA database for **real time big data management.**
- Digital printer on sheet metal for customization of **high quality printing.**
- Predictive algorithms for **advanced and efficient remote surveillance service.**



Espresso coffee machines sector - Innovation case study 2

Innovation product:

- Improvement of the coffee's extraction quality and improvement of the customer service.
- Care to ergonomics in order to simplify the barista's work by automating routine functions that do not add value to the service.
- Reduction of environmental impact: the Italian companies are acting on the choice of materials in order to reduce the carbon footprint of the product, both during production and end-of-life, and on energy consumption reduction. Four years ago, Ucimac was promoter and the association is now coordinating an European standardization working group on the energy consumption of espresso coffee machines.



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Food processing machines - Innovation case study 3

Innovation product:

- Improvement of the quality and safety standard's.
- Attention to ergonomics to simplify the operator's work by simplyfing the machines.
- Use of refrigerated machines to improve the cold chain and reduce waste of food.
- Use of Wi-Fi transmitters on machines, to have in real time control of correct functioning and, with proprietary algorithm, predictive manutention and immediate warning in case of fault.
- Reduction of environmental impact: the Italian companies are acting on the choice of materials (like high efficiency motors) to reduce the carbon foot print of the product, during production, the use itself and at the end of its life, and on energy consumption reduction.



GRAZIE PER L'ATTENZIONE!

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ANIMA Confindustria
The Federation of the Italian Associations
of Mechanical and Engineering Industries