



Ministry of Foreign Affairs  
and International Cooperation

#VIVERE **ALL'** ITALIANA

Diplomazia  
Economica  
Italiana



# Excellence

ITALIAN MAIN  
PRODUCTIVE  
SECTORS

QUALITY

CREATIVITY

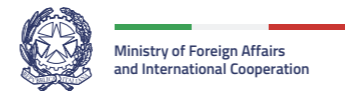
SUSTAINABILITY

TRADITION

CULTURE

INNOVATION





#VIVERE ALL'ITALIANA

Diplomazia Economica Italiana

# Excellence

ITALIAN MAIN PRODUCTIVE SECTORS



*Since the Renaissance, Italy has been renowned worldwide for its creativity and style, distinctive qualities still shaping its reputation at global level.*

*But Italy is much more than a cultural superpower. It is home to widely appreciated fashion brands and exquisite food. It is also a world leader in many other important sectors, such as machineries, wood industry, infrastructure and mobility, industrial design, cosmetics, pharmaceuticals and aerospace technologies, just to name a few.*

*This upgraded edition of "Italian Excellence" comes in the aftermath of the COVID-19 pandemic, which speeded up global processes and trends such as the "twin transitions", green and digital. Also in the fields of renewable energies, recycling, circular economy and sustainability, Italy holds a prominent role worldwide.*

*The unique combination of tradition and innovation, search for quality and excellence, care for human relations and respect for the environment - the "Made in Italy" in its very essence - allows our Country to succeed in the challenges ahead. Italy's excellences spread over many fields and productive sectors, sometimes unknown or underestimated.*

*I am confident that this publication will provide foreign institutions and investors, companies and people interested in our Country, with a better understanding of the widespread array of Italy's capabilities.*

LUIGI DI MAIO  
Minister of Foreign Affairs  
and International Cooperation



COMPETITIVENESS



SUSTAINABILITY AND CIRCULAR ECONOMY



AGRIFOOD



INFRASTRUCTURE AND MOBILITY

# ITALIAN MANUFACTURING EXCELLENCE



ART AND ARCHITECTURAL RESTORATION



ARTS, CULTURE AND TOURISM



AUTOMOTIVE



MACHINERIES



MARINE INDUSTRY



MEDICAL AND PHARMACEUTICAL INDUSTRY



COSMETICS



DESIGN



FASHION



RENEWABLES



UNIVERSITY, INNOVATION AND RESEARCH



WOOD INDUSTRY



# COMPETITIVENESS

Italy is the **world's second most competitive country** in the manufacturing sectors\*

*\* According to the Trade Performance Index 2019*



Italy ranks 4<sup>th</sup> among G20 Countries for its trade surplus (2020).



Source: TDM Trade Data Monitor (July 2021)



Among the **TOP100** luxury goods companies in the world, **24 are based in Italy** (first country worldwide). Over 2/3 out of these 24 companies operate in the «**clothing and footwear**» sectors.



## SUSTAINABILITY AND CIRCULAR ECONOMY

Italy is leader in Europe for its **efficient use of resources in manufacturing processes**



More than 345,000 Italian companies (about a quarter of the total) invest in the **green economy**, that is to say in products and technologies aimed at reducing the environmental impact, saving energy and containing CO<sub>2</sub> emissions.

We are the **1<sup>st</sup> country** in Europe for turnover per-capita in the field of products developed with biological processes (like bioplastics). Italy is, along with Germany, the **leading country** in Europe for secondary raw material recycled in the manufacturing industry.

Italian performance draws its strength from the very essence of the “Made in Italy”, capable of creating economic value from intangible assets such as design, innovation and quality.

Italy ranks **1<sup>st</sup> among the top five EU economies** with the highest percentage of recycled waste (including urban, industrial and mineral) and efficient waste reduction: 43.2 tons per million euros produced. For every kilogram of resource consumed, our country generates (according to the purchasing power) 4€ of GDP.

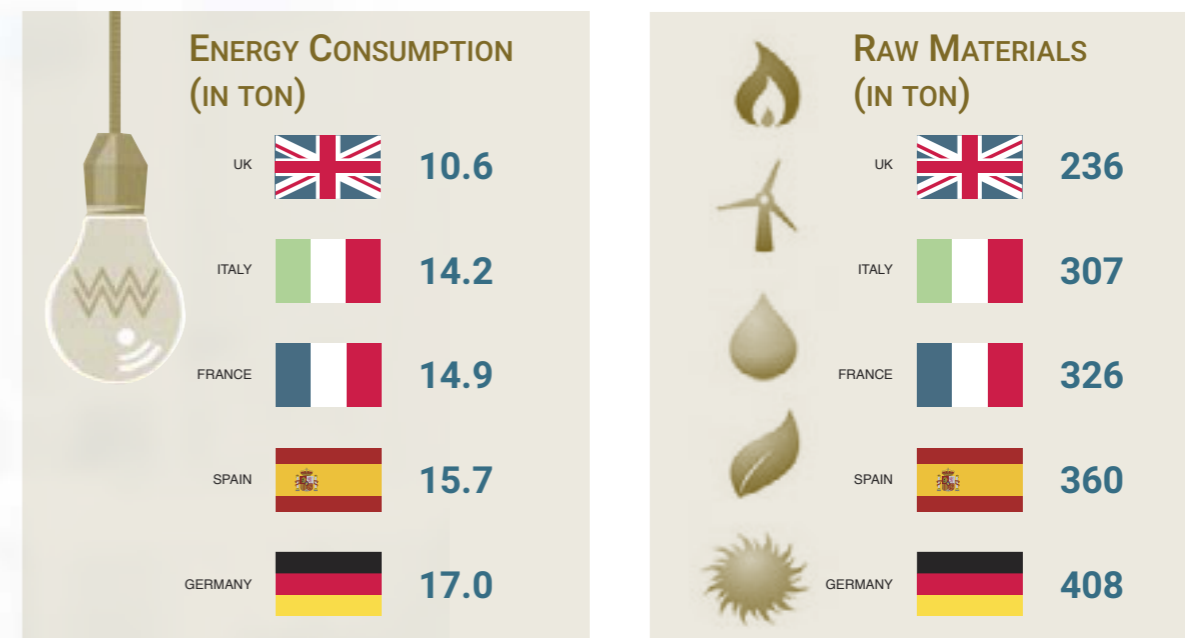
**1<sup>st</sup> in Europe in terms of its rate of circular economy.**

18,5% of the total raw material consumption comes from secondary raw materials which is equivalent to saving 21 tons of oil and 58 tons of CO<sub>2</sub>.

**2<sup>nd</sup> in Europe for efficient use of raw materials.** 307 tons of raw materials for every million euros produced.

**2<sup>nd</sup> in Europe for energy consumption per unit of product.**

Source: “L’Italia in 10 selfie” 2019 edited by Symbola



Source: “Rapporto sull’economia circolare in Italia 2019” edit by Circulation economy Network





## AGRIFOOD

**Italy** is the **most sustainable** country in the agricultural and **the first one in the world** for food quality certification



Italy is among the **first 10 global exporters** in the agri-food sector (first industry/sector of the country) with an added value per hectare higher than the other EU countries.

The food industry is one of the undisputed leading sectors of the Italian economy. The Italian food industry offers the highest standards in terms of safety and quality, combining both innovation and tradition.

The most exported food products are: wines and sparkling wines, fresh and dried fruit and vegetables, pasta, dairy products. Wine is the most exported product, 20% of processed products' exports.

## Key data

**137** bn € turnover (about 9% of GDP)

**385,000** employees

**56,000** companies (over) in the agri-food sector

**8.8** bn € of Italian exports (on a total of 15 bn, 20% of exports)

**55.331** farms managed by under 35

Source: Symbola 2019

With over 200,000 companies, Italy holds almost a third of the Protected Designations of Origin in the world (822 out of approx. 3,000) amounting to €15 billion in production and €8.8 bn in exports.

Italy is the **1<sup>st</sup> European** country for agri-food products recognized by the European Union as Geographical Indications and Designations of Origin\*.

\* For more details: <https://dopigp.politicheagricole.it/en/home>

### ORGANIC PRODUCERS IN THE EU, FIRST COUNTRIES, 2018 (ABSOLUTE VALUE)



70 THOUSAND

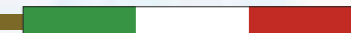


39.5 THOUSAND



36.7 THOUSAND

Source: Fondazione Symbola, Italy in 10 Selfie, 2020



## USEFUL LINKS

### Food & Beverages

[www.federalimentare.it](http://www.federalimentare.it) - **FEDERALIMENTARE**

[www.filieraitalia.it](http://www.filieraitalia.it) - **FILIERA ITALIA**

[www.aiipa.it](http://www.aiipa.it) - **AIIPA** - Associazione Italiana Industrie Prodotti Alimentari

[www.assobibe.it](http://www.assobibe.it) - **ASSOBIBE** - Associazione Italiana Industriali delle Bevande Analcoliche

[www.assobirra.it](http://www.assobirra.it) - **ASSOBIRRA** - Associazione dei Birrari e dei Maltatori

[www.mineracqua.it](http://www.mineracqua.it) - **MINERACQUA** - Federazione delle Industrie delle Acque minerali e delle bevande analcoliche

### Dairy products

[www.assolatte.it](http://www.assolatte.it) - **ASSOLATTE** - Associazione Italiana Lattiero-Casearia

### Meat

[www.assica.it](http://www.assica.it) - **ASSICA** - Associazione Industriali delle Carni e dei Salumi

[www.assocarni.it](http://www.assocarni.it) - **ASSOCARNI** - Associazione Nazionale Industria Commercio Carni e Bestiame

### Fruit and Vegetables

[www.fruitimprese.it](http://www.fruitimprese.it) - **FRUITIMPRESE** - Associazione Nazionale Esportatori Importatori Ortofrutticoli

### Olive oil

[www.assitol.it](http://www.assitol.it) - **ASSITOL** - Associazione Italiana Industria olearia

### Wine

[www.federvini.it](http://www.federvini.it) - **FEDERVINI** - Federazione Italiana Industriali Produttori Esportatori ed Importatori di Vini Liquori e affini

[www.unioneitalianavini.it](http://www.unioneitalianavini.it) - **UNIONE ITALIANA VINI**

### Fisheries

[www.federpesca.it](http://www.federpesca.it) - **FEDERPESCA** - Federazione Nazionale delle Imprese della Pesca

[www.ancit.it](http://www.ancit.it) - **ANCIT** - Associazione Nazionale Conservieri Ittici e delle Tonnare





# ART AND ARCHITECTURAL RESTORATION

**Traditional know-how and  
new technologies for the  
future of our common  
heritage**



Reale tenuta Carditello – Caserta - Italy



Sheik Suleyman Mosque - Istanbul

Italian culture is not only composed by grand museums or famous cultural sites, but **Italian heritage is also multi-faceted** as it comprises of archaeology, landscapes, traditions and historic locations.



Botanical Garden - Palermo - Italy

One of the most prominent aspects of Italian Heritage is **the vast array of hidden gems** around the Country.

**This rich cultural tapestry is managed by Italian professionals and specialists trained in several areas of expertise**, such as engineering, chemistry, arts.

The sub-sector of architecture and restoration

represents 51% of the entire cultural industry in Italy, most of its turnover comes from public investment (90%). **This sector includes activities ranging from the analysis and diagnostics to specific production of compatible material for restoration.**

**New technologies have been developed to preserve and enhance historical and artistic sites.**

Innovative technologies such as digital modeling and augmented reality are used to create new opportunities in historical sites and museums (such as highlighting contrast with the current reality on bringing objects or scenes to life), aimed at enhancing broader public access and improving the experience of cultural heritage sites, **with a goal towards raising the respect and educating the public about the beauty of the past.**





## Key data

- 211,310** Listed historical items and venues
- 4,400** companies specialized in restoration and maintenance of listed architectural sites
- 520** companies dealing with archeology and underground artistic excavation
- 167** bn € the total value of the activities related to cultural heritage recovery

Source: Assorestauro



Spirito Santo Hospital – Lecce - Italy

## USEFUL LINKS

- [www.arpai.org](http://www.arpai.org) - **ARPAI** - Associazione per il Restauro del Patrimonio Artistico Italiano
- [www.ari-restauro.org](http://www.ari-restauro.org) - **ARI-RESTAURO** - Associazione Restauratori d'Italia
- [www.assorestauro.org](http://www.assorestauro.org) - **ASSORESTAURO** - Associazione Italiana per il Restauro Architettonico, Artistico, Urbano
- [www.confartigianato.it/come/categorie/artistico/\(restauro\)](http://www.confartigianato.it/come/categorie/artistico/(restauro)) - **CONFARTIGIANATO IMPRESE**





# ARTS, CULTURE AND TOURISM

**First in the world** for  
**UNESCO** Heritage World  
Sites



# CULTURAL AND HISTORICAL SITES

First in the world for UNESCO Sites



70% of the worldwide **historic heritage** is in Italy.

Italy is the country holding the record for UNESCO World Heritage Sites with **58 sites** in the 2021 list. In 2018, there were 123 million tourist arrivals in Italy with 426 million overnight stays.

Furthermore, Italy is the **2<sup>nd</sup>** European country for number of overnight stays of non-EU tourists. In 2019, the most visited UNESCO Site is the city center of **Matera**. (photo in the previous page: Padua's fourteenth-century fresco cycles).

## USEFUL LINKS

[www.associazioneaicc.it](http://www.associazioneaicc.it) - **AICC** - Associazioni Imprese Culturali e Creative

[www.anica.it](http://www.anica.it) - **ANICA** - Associazione Nazionale Industrie Cinematografiche Audiovisive Multimediali

[www.federculture.it](http://www.federculture.it) - **FEDERCULTURE**

[www.unesco.it](http://www.unesco.it) - **UNESCO ITALIA**

[www.assoturismo.it](http://www.assoturismo.it) - **ASSOTURISMO** - Federazione Italiana del Turismo - Confesercenti  
[www.confindustriaculturaitalia.it](http://www.confindustriaculturaitalia.it) - **CONFINDUSTRIA CULTURA ITALIA** - Federazione italiana dell'industria culturale

[www.enit.it](http://www.enit.it) - **ENIT** - Agenzia Nazionale Italiana del Turismo

[www.federturismo.it](http://www.federturismo.it) - **FEDERTURISMO CONFINDUSTRIA** - Federazione Nazionale dell'Industria dei Viaggi e del Turismo

<https://museimpresa.com> - **MUSEIMPRESA** - Associazione Italiana Archivi e Musei d'Impresa

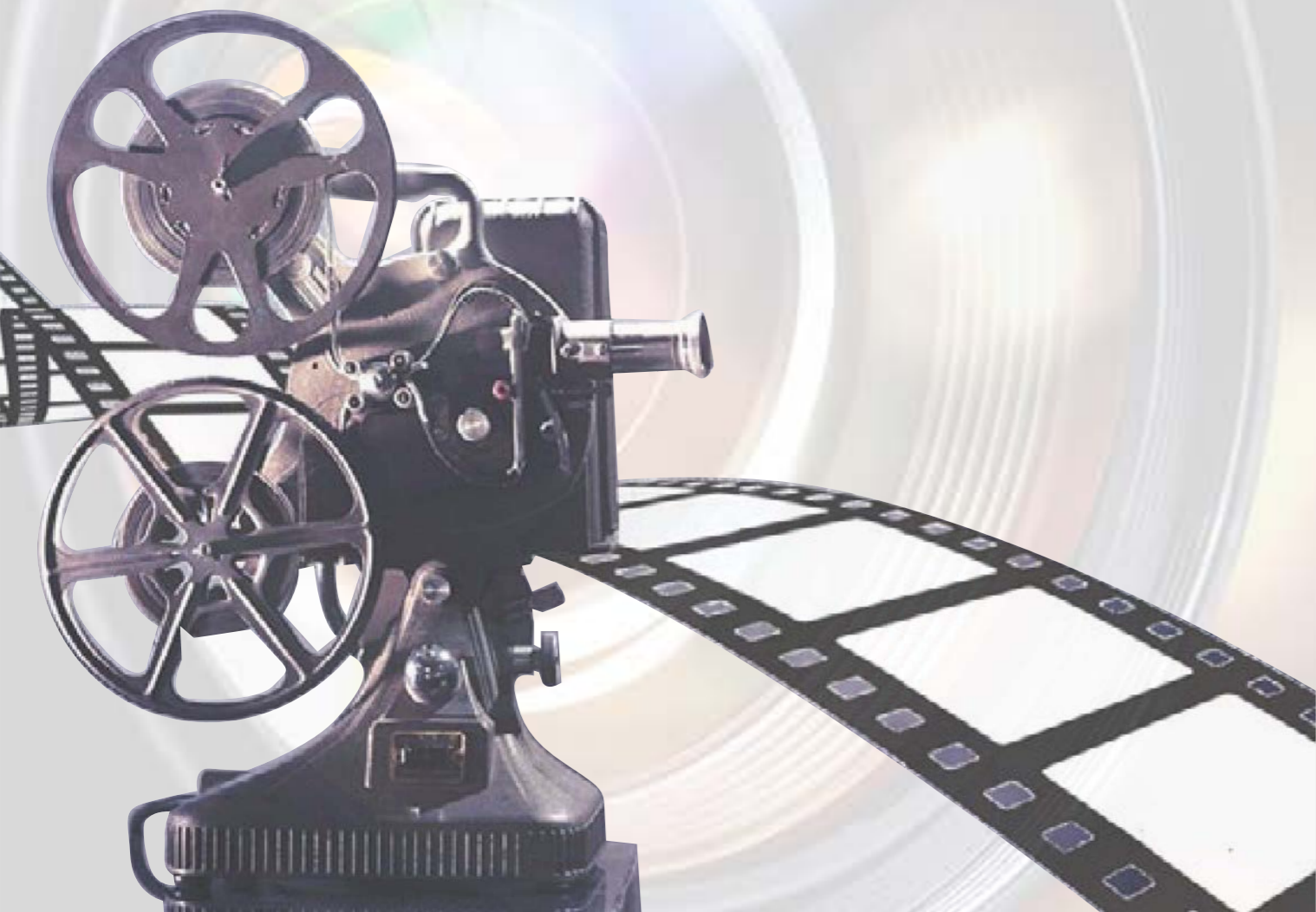






# CULTURAL AND CREATIVE INDUSTRY (CCI)

First in Europe for number of cultural companies

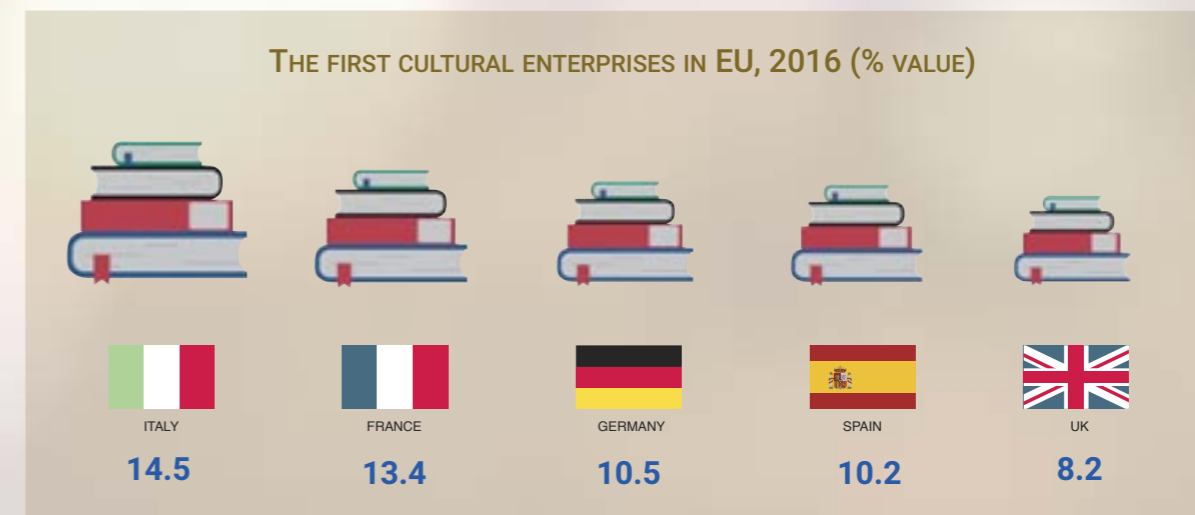


The **Cultural and Creative Industry (CCI)** employs more than 1.55 million workers (6.1% of the total).

CCI exports represent 14% of the total (62 billion euro).

The driving sectors are: **software** (12%), **design** (4.3%), **performing arts** (2.5%), **communication** (1.2%) and **promotion** of the historic and artistic heritage.

**In the audiovisual industry** Italy is: among the top 10 countries in the world for added value and third in Europe for productivity.

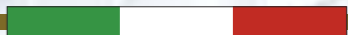


Source: Fondazione Symbola, Italy in 10 Selfie, 2020  
Industria Italiana del Cinema e dell'Audiovisivo edited by Confindustria, 2019



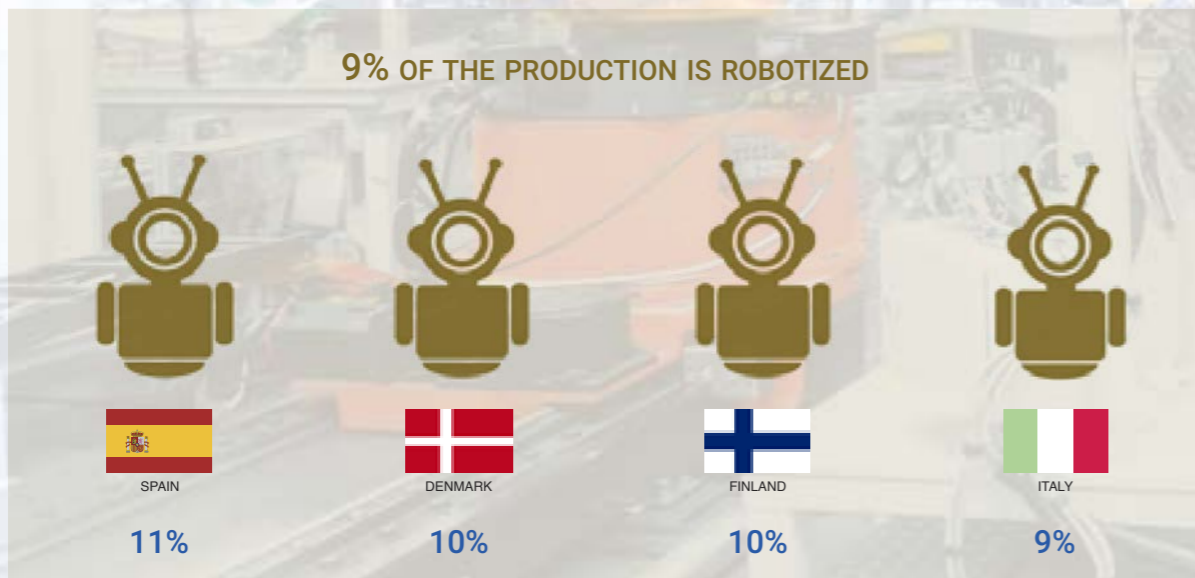
## AUTOMOTIVE

**Italy** is one of the **main**  
**world car producers**



**Italy** ranks among the first countries with the highest percentage of industrial robots used in the automotive industry (9% of companies compared to a 7% European average).

**Italy** is an example of innovation in the sustainable mobility sector (in 2019 rechargeable cars registration accounted for 1.1% of the market).



Source: ANFIA - Associazione Nazionale Filiera Industria - 2019

## Key data

**93** bn € turnover (5,6 of the Italian GDP)

**44** bn € exports

**253,000** employees  
(7% of the entire manufacturing sector)

**5,700** companies

**1.79** bn € in R&D expenditure

Source: Elaborazione Symbola; ANFIA - Associazione Nazionale Filiera Industria 2020

## MAIN INDUSTRIAL DISTRICTS AND ASSOCIATION

Piemonte, Lombardia, Emilia Romagna, Abruzzo, Campania, Basilicata

[www.anfia.it](http://www.anfia.it) - **ANFIA** - Associazione Nazionale filiera industria automobilistica

[www.ancma.it](http://www.ancma.it) - **Confindustria ANCMA** - Associazione nazionale Ciclo motociclo accessori



## COSMETICS

Italian cosmetics industries invest **6% of total turnover** in innovation, research and development



## Key data

- 12** bn € turnover
- 33,2** bn € the cosmetic supply chain turnover
- 2,8** bn € trade balance
- 79,8** bn € cosmetics market in Europe
- 6%** R&D investments on total cosmetics turnover
- 20%** natural, organic, green cosmetics on total cosmetics turnovers

Source: COSMETICA Italia 2021

**55% of make-up** distributed around the world is produced by Italian contract manufactures.

Italian cosmetics industries invest **6% of total turnover in innovation, research and development**, almost twice the national manufacturing industry average, estimated at 3%.

Export is the driving force behind the **beauty industry**: made in Italy cosmetics are increasingly renowned all over the world and constantly gain new market shares, as they are **synonymous of quality, technology, safety and creativity**.



### USEFUL LINKS

[www.cosmeticaitalia.it](http://www.cosmeticaitalia.it) - **COSMETICA ITALIA** - The personal care association (member of Federchimica and partner of Cosmoprof Worldwide Bologna)





## DESIGN

**Italy** ranks **second** in Europe for turnover to GDP ratio in the **design sector**

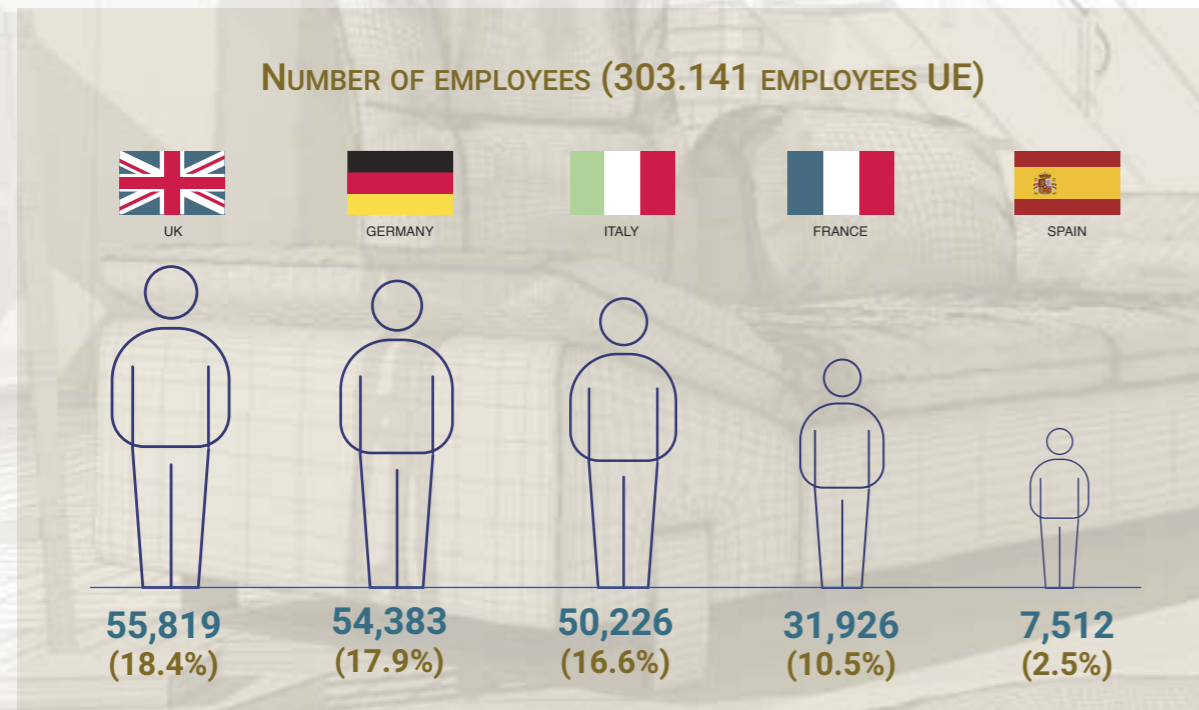


Italy shows remarkable competitive skills in the design field compared to the other main EU countries.

In Italy the design industry employs over 50,000 people, 16.6% of total number of design workers in Europe.

Milan has one of the highest concentrations of design schools in the world and more than 25% of companies working in the field of design.

In Italy 30,828 companies work actively in the design field (15,5% of the total in the EU). Italy is the leading country in terms of business density at national level.



### USEFUL LINKS

- [www.adi-design.org](http://www.adi-design.org) - **Adi** - Associazione per il disegno industriale
- [www.aipi.it](http://www.aipi.it) - **AiPI** - Associazione italiana progettisti d'interni
- [www.confindustriaceramica.it/site/en/home.html](http://www.confindustriaceramica.it/site/en/home.html) - **CONFINDUSTRIA CERAMICA**
- [www.assomarmomacchine.com/en/](http://www.assomarmomacchine.com/en/) - **CONFINDUSTRIA MARMOMACCHINE**
- <https://www.assorestauro.org/en> - **ASSORESTAURO** - Italian association for architecture, art and urban restoration
- <https://www.assoimmobiliare.it/> - **CONFINDUSTRIA ASSOIMMOBILIARE**



Source: Design economy 2019 edited by Symbola. Deloitte



## FASHION

The **fashion industry** (textile, clothing, footwear) generates an **added value of 24.2 billion** euros





The fashion industry represents 10% of the Italian manufacturing.

The fashion segment (textile, clothing, footwear) produces an added value of 24.2 billion euros.

“Made in Italy” is a fashion industry leader in Europe, both in terms of productions and of generated added value: 33.9% of the added value generated by the fashion industry comes from Italy.

About 70% of Italian fashion exports (about 51 billion euros) come from ‘haute couture’, holding significant market shares: 16% in footwear and 21% in leather goods.



Source: Fondazione Symbola, Italy in 10 Selfie, 2020



## MAIN INDUSTRIAL DISTRICTS AND ASSOCIATIONS

### Clothing and Textile

Bari, Napoli, Empoli, Rimini, Brescia, Marche, Abruzzo, Gallarate, Carpi, Perugia, Montefeltro, Castel Goffredo, Salento, Como, Val Seriana, Biella, Arezzo, Prato, Schio-Thiene-Valdagno, Treviso

[www.sistemamodaitalia.com](http://www.sistemamodaitalia.com) - **SISTEMA MODA ITALIA** - Federazione tessile e moda

[www.confindustriamoda.it](http://www.confindustriamoda.it) - **CONFINDUSTRIA MODA** - Federazione imprese e associazioni del settore tessile moda e accessorio

<https://www.confartigianato.it/come/categorie/moda/> (per calzaturieri) - **CONFARTIGIANATO IMPRESE**

### Leather

Arzignano, Solofra, Santa Croce sull'Arno, Tolentino, Arezzo, Firenze

[www.unic.it](http://www.unic.it) - **UNIC** - Unione Nazionale industria conciaria

[www.assopellettieri.it](http://www.assopellettieri.it) - **ASSOPELLETTERI** - Associazione italiana manifatturieri pelli-cuoio e succedanei

### Footwear

Montebelluna, Verona, Brenta, Bari, Casarano, Fermo, Lamporecchio, Lucca, San Mauro Pascoli, Vigevano, Napoli

[www.assocalzurifici.it](http://www.assocalzurifici.it) - **ASSOCALZATURIFICI** - Associazione calzaturifici italiani

### Jewelry

Arezzo, Valenza, Vicenza

[www.federorafai.it](http://www.federorafai.it) - **CONFINDUSTRIA FEDERORAFI** - Federazione Nazionale Orafi Argentieri Gioiellieri Fabbricanti

### Eyewear

Belluno

[www.anfao.it](http://www.anfao.it) - **ANFAO** - Associazione nazionale fabbricanti articoli ottici

[www.assottica.it](http://www.assottica.it) - **ASSOTTICA** - Associazione nazionale industria dell'ottica, meccanica fine e di precisione

# INFRASTRUCTURE AND MOBILITY

The Italian infrastructure industry is **one of the most important and advanced in the world**, in terms of technology, design, execution and management skills

Genoa "San Giorgio" Bridge - Italy



# CONSTRUCTION

First in Europe for number of construction companies abroad



A3 Salerno – Reggio Calabria Highway - Italy



Stavros Niarchos Foundation Cultural Center - Athens Greece

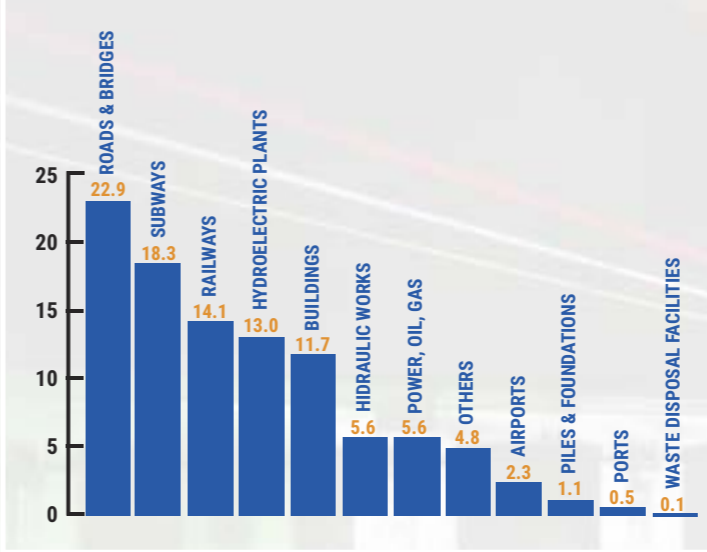


Monte Ceneri Base Tunnel - Switzerland



Third Bosphorus Bridge - Turkey

Amount of Contracts per Sector (% on Total Revenues)



Source: ANCE Foreign Report 2018

1,000 construction sites in 92 countries in 5 Continents

## USEFUL LINKS

[www.ance.it](http://www.ance.it) - ANCE - Associazione Nazionale Costruttori Edili

[www.confartigianato.it/come/categorie/edilizia/](http://www.confartigianato.it/come/categorie/edilizia/) - CONFARTIGIANATO IMPRESE

[www.federcepicostruzioni.it](http://www.federcepicostruzioni.it) - FEDERCEPICOSTRUZIONI





# ENGINEERING, ARCHITECTURE, CONSULTANCY

Third in the world, after US and China, for number of firms with projects abroad



Genoa Saint George Bridge - Italy



Odense University Hospital - Denmark



Rome Tiburtina Station - Italy



Strategic Ports - Kuwait

Over 60% of the total turnover is made outside Italy. Present in over 180 countries and in all 5 continents.



## USEFUL LINKS

[www.oice.it](http://www.oice.it) - **OICE** - Associazione delle Organizzazioni di Ingegneria e Consulenza





# SUSTAINABLE MOBILITY

Italy is recognized worldwide as a reliable and competent partner in the field of mobility



FS Frecciarossa 1000 in FS HS Reggio Emilia Railway Station

### MILESTONE

- Safety
- Sustainability
- Efficiency
- Technological development
- Digitalization
- Education/training
- Environmentally friendly approach

### MAIN ACHIEVEMENTS

*ERTMS/ETCS level 2 signaling system*: highest level of safety up to 300 km/h

*Train Frecciarossa 1000*: 360 km/h and almost 100% recyclable

*Smart Stations*: innovative way of rethinking mobility hub and services

*Diagnostic train*: High Speed train at 300 km/h for maintenance measures of the line

*Smart Road and Pavement Management System*: safety systems for roads & highways.

## Key data

**29,000** km - railway tracks (of which 1,500 high speed), with 9,000 train per day managed

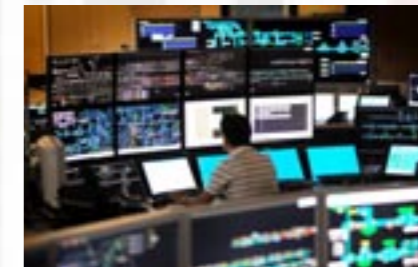
**235,000** km (about) - road network (roads & highways)

**1,1** billion tons (about) - freight transported (2019)

Source: CNIT 2018-2019, ISTAT 2019, FS reports 2020



FS Naples HS Railway Station



FS High Speed Command and Control Room, Bologna Railway Station

## USEFUL LINKS

- [www.agens.it](http://www.agens.it) - Agenzia Confederale dei Trasporti e Servizi
- [www.anav.it](http://www.anav.it) - Associazione Nazionale Autotrasporto Viaggiatori
- [www.federturismo.it](http://www.federturismo.it) - Federazione Nazionale dell'Industria dei Viaggi e del Turismo



# MACHINERIES

Among the **top world leaders** for trade surplus and for technological standards



**Italy** is among the top world leaders in trade surplus and for its high technological standards.

**Italy** is the fifth country in the world for machineries' exports.

Machineries is the first sector of Italian export (18% of total exports - 2019).

## Key data

**5,150** companies in the machineries sector  
**193,750** global employment  
**48.3** bn € turnover  
**67%** of the total production exported  
**80** bn € exports  
**50** bn € trade surplus

Source: Osservatorio Economico - Federmacchine 2020

## MAIN INDUSTRIAL DISTRICTS AND ASSOCIATIONS



Brescia, Bergamo, Varese, Vicenza, Lecco, Mantova, Bari, Trentino Alto Adige, Padova, Verona (THERMO-MECHANICAL), Parma (FOOD), Reggio Emilia, Modena (AGRI), Vigevano (LEATHER), Rimini, Pesaro (WOOD), Bologna (PACKAGING), Biella (TEXTILE), Piacenza (TOOLS), Udine, Pordenone

[www.anima.it](http://www.anima.it) - **ANIMA** - Confindustria meccanica varia

[www.federmeccanica.it](http://www.federmeccanica.it) - **FEDERMECCANICA** - Federazione Sindacale dell'Industria Metalmeccanica Italiana

[www.federmacchine.it](http://www.federmacchine.it) - **FEDERMACCHINE** - Federazione Nazionale delle Associazioni dei Produttori di Beni Strumentali

[www.aidam.it](http://www.aidam.it) - **AIDAM** - Associazione italiana di automazione meccatronica

[www.acimall.it](http://www.acimall.it) - **ACIMALL** - Associazione costruttori italiani macchine e accessori per lavorazione legno

[www.acimga.it](http://www.acimga.it) - **ACIMGA** - Associazione costruttori italiani macchine per l'industria grafica e cartaria

[www.acimit.it](http://www.acimit.it) - **ACIMIT** - Associazione costruttori italiani macchinari per l'industria tessile

[www.amaplast.org/it](http://www.amaplast.org/it) - **AMAPLAST** - Associazione nazionale costruttori di macchine e stampi per materia plastiche e gomma

[www.assomac.it](http://www.assomac.it) - **ASSOMAC** - Associazione nazionale dei costruttori italiani di macchine ed accessori per calzature, pelletteria e conceria

[www.assomarmomacchine.com](http://www.assomarmomacchine.com) - **CONFINDUSTRIA MARMOMACCHINE** - Associazione italiana marmomacchine

[www.confartigianato.it/come/categorie/meccanica/](http://www.confartigianato.it/come/categorie/meccanica/) - **CONFARTIGIANATO IMPRESE**

[www.federunacoma.it](http://www.federunacoma.it) - **FEDERUNACOMA** - Federazione nazionale costruttori macchine per l'agricoltura

[www.gimav.it](http://www.gimav.it) - **GIMAV** - Associazione italiana fornitori di macchine ed accessori per la lavorazione del vetro

[www.ucima.it](http://www.ucima.it) - **UCIMA** - Unione costruttori italiani macchine automatiche per il confezionamento e imballaggio

[www.ucimu.it](http://www.ucimu.it) - **UCIMU SISTEMI PER PRODURRE** - Associazione costruttori italiani macchine utensili, robot e automazione



# PRESSURE EQUIPMENT INDUSTRY

for Oil & Gas, Chemical, Petrochemical and Energy generation plants



Italy is among the **top five exporting countries in the world**, following China, USA, South Korea and Germany.

The pressure equipment sector is a heavy industry branch, which activities are related to the design and manufacturing of process equipment such as tanks, machines, heat exchangers, boilers, pressure vessels, reactors for chemical, petrochemical, Oil&Gas and Energy industries.

Over the years, the companies in the sector have acquired the **highest level of complex technological knowledge** to fabricate high quality products for the international market.

## Key data

**10** bn € turnover

**7** bn € supply chain turnover

**80%** products export

**23,000** people employed

**30,000** people employed in the **supply chain**

Source: AIPE - The Italian Association of Pressure Equipment's manufacturers - 2021

It is therefore a vital sector and a source of sustainability for the Italian system, since it significantly contributes to the trade balance.

## USEFUL LINKS

[www.aipe.it](http://www.aipe.it) - **AIPE** - The Italian Association of Pressure Equipment's manufacturers







# MARINE INDUSTRY

**Italy is leader** of the  
shipbuilding sector.



# NAUTICAL INDUSTRY

Italy ranks **1<sup>st</sup> in the world** for superyachts production (49,6% of the superyachts' world orders) with 407 boats under construction in 2021 out of a total of 821 globally.

In pleasure boating, Italy is unrivaled: in terms of trade balance, with revenues reaching almost two billion dollars (1.9), ahead of

The Netherlands (1.7 billion), the United Kingdom (831 million), Germany (792 million) and Mexico (689).

BOATING TRADE BALANCE, TOP FIVE COUNTRIES IN THE WORLD, 2018 (MILLIONS OF DOLLARS)



Source: Fondazione Symbola, Italy in 10 Selfie, 2021

# CRUISE SHIPS

Italian cruise shipbuilding is a world leader, serving the biggest operators of the sector. The industry counts **20,000 workers** and creates around **180,000 jobs worldwide**

More **than 100 cruise ships** delivered since 1990

1 in 3 cruise passengers sails on ships built in Italy

Next achievements:

- the contribution to the global cruise industry will **reach 144 ships**.
- a transport potential of **over 14 million passengers** per year.
- **40 vessels** to be delivered.



## MAIN INDUSTRIAL DISTRICTS AND ASSOCIATIONS

- Liguria, Veneto, Friuli Venezia Giulia, Toscana, Campania
- [www.assonave.it](http://www.assonave.it) - **ASSONAVE** - Associazione nazionale industria navalmeccanica
- [www.assonautica.it](http://www.assonautica.it) - **ASSONAUTICA ITALIANA**
- [www.confitarma.it](http://www.confitarma.it) - **CONFITARMA** - Confederazione italiana armatori
- [www.assarmatori.eu](http://www.assarmatori.eu) - **ASSARMATORI**
- [www.confindustrianautica.net/en/](http://www.confindustrianautica.net/en/) - **CONFINDUSTRIA NAUTICA** – Italian Marine Industry Association





# MEDICAL AND PHARMACEUTICAL INDUSTRY

**Italy** is the second **healthiest**  
country in the world\*

*\* According to the Bloomberg Global Health Index 2021*



Italy is leader in the EU for pharmaceutical production and first for export growth in the last 5 years.

Despite the pandemic crisis, in 2020, Italian export in pharmaceutical articles increased by + 3,8 %

## Key data

**58** bn € turnover in the **life sciences industry**

**+17%** **patent applications** (european patent office) for pharmaceutical, biotechnologies and medical technologies (+6%the world average)

**R&D** **4° in the world** for scientific publications on Covid-19 in 2020 (first among EU countries)

Source: Farmindustria 2021

### PHARMACEUTICAL EXPORT: CUMULATIVE GROWTH 2020-2015



Source: Assolombarda, European Patent Office, OECD, Eurostat

### MAIN INDUSTRIAL DISTRICTS AND ASSOCIATIONS

Toscana, Lazio, Lombardia, Emilia Romagna, Veneto, Catania, Napoli (PHARMACEUTICALS); Bologna, Milano, Mirandola, Veneto (BIOMEDICAL DISTRICTS)

[www.farmindustria.it](http://www.farmindustria.it) - **FARMINDUSTRIA** - Associazione delle imprese del farmaco

[www.egualia.it](http://www.egualia.it) - **EGUALIA** - Industrie farmaci accessibili

[www.confindustriadm.it](http://www.confindustriadm.it) - **CONFINDUSTRIA DISPOSITIVI MEDICI** - Federazione Nazionale imprese operanti nei settori dei Dispositivi Medici e delle Tecnologie Biomediche

[www.assobiotec.federchimica.it](http://www.assobiotec.federchimica.it) - **ASSOBIOTEC** - Associazione nazionale per lo sviluppo delle biotecnologie



# RENEWABLES

**Italy** holds a **prominent role** worldwide in the field of renewable energy



Italy ranks **1<sup>st</sup>** in Europe for share of renewable energy in the gross domestic consumption (17.4%), ahead of Spain (17.3%), France (16%), Germany (14.8%).

According to the University of Oxford, Italy ranks **2<sup>nd</sup>** in the world for the export of green products.

## Key data

**290.1** bn € of turnover  
**185,600** employees of energy companies

Italian records in the production of **technologies applied for renewables:**

**23** bn € total turnover  
**60,000** employees  
**6<sup>th</sup>** in the **world** for export of renewable technologies  
**4,7** bn € the **Italian export** in the last 5 years  
**120** companies from hydrogen supply chain with **7 bn € of turnover**

Source: Fonte Centro Studi CoMar - Intesa San Paolo, 2021



Source: Fondazione Symbola, Italy in 10 Selfie, 2021

## USEFUL LINKS

- [www.anigas.it](http://www.anigas.it) - **ANIGAS** - Associazione Nazionale industriali gas
- [www.assistal.it](http://www.assistal.it) - **ASSISTAL** - Associazione nazionale costruttori impianti e servizi di efficienza energetica e facility management
- [www.elettricitafutura.it](http://www.elettricitafutura.it) - **ELETTRICITÀ FUTURA** - Unione imprese elettriche italiane
- [www.anierinnovabili.anie.it](http://www.anierinnovabili.anie.it) - **ANIE** - Rinnovabili
- [www.greeneconomynetwork.it](http://www.greeneconomynetwork.it) - **GREEN ECONOMY NETWORK** - Assolombarda
- [www.fiper.it](http://www.fiper.it) - **FIPER** - Federazione italiana produttori di energia da fonti rinnovabili



A satellite with large solar panels is shown in space, orbiting Earth. The satellite is gold and white with blue solar panels. The Earth is visible below, showing clouds and the blue atmosphere. The background is a starry space.

## UNIVERSITY, INNOVATION AND RESEARCH

**Italy's skilled workforce** offers a better cost performance compared to other European countries

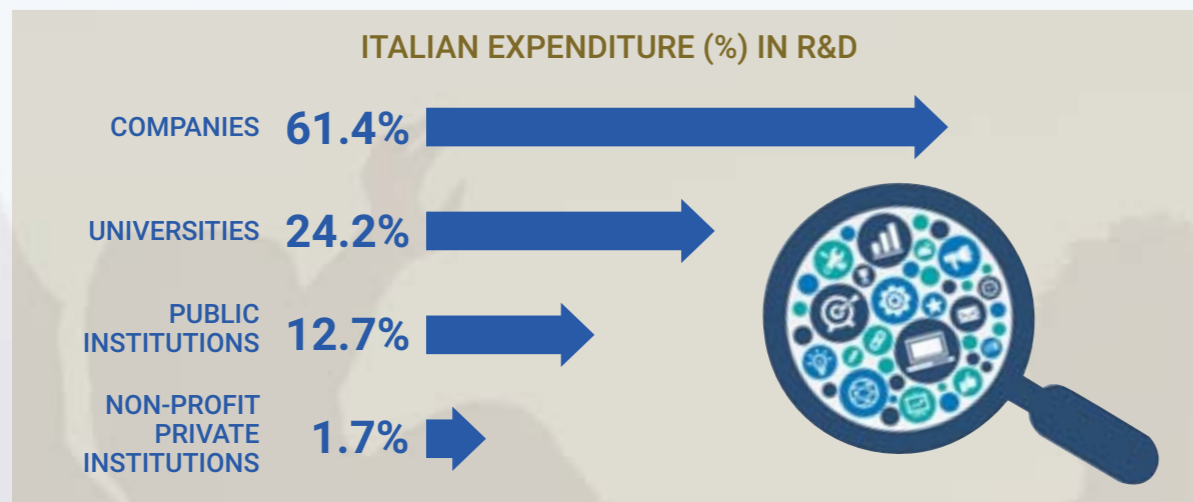


**36 Italian universities** are among the top 1,000 world universities (2020). **Italy** is the 7<sup>th</sup> most represented country in the world and 3<sup>rd</sup> in Europe according to the QS World University Rankings.

Italian universities are constantly increasing their position in the ranking among the top world best universities and Italy remains a well-established center of absolute excellence for advanced studies and quality teaching.

**Fourth in Europe** for its public University System and **fifth in the world** for **most quoted academic publications**.

Source: World University Rankings 2020 Report by Quacquarelli Symonds (QS)



Source: "Quaderni Symbola 2019" edited by Symbola

The **University of Bologna** is the most appreciated by the international academic community, followed by **Sapienza University**. The **Politecnico of Milan** is the highest valued by international recruiters.

**Bicocca University** in Milan is the first in Italy and 115th in the world for citations per Faculty, the indicator measuring the influence of the research produced, followed by the **University Federico II** of Naples. The **University Vita-Salute San Raffaele** is the first in Italy and thirty-seventh in the world in terms of teachers-students ratio, followed by the **University Cattolica del Sacro Cuore**. The **Libera Università di Bolzano** ranks first in Italy for number of international professors and, finally, the Politecnico of Milan for the percentage of international students.

300,000 students graduate from Italian universities every year.

Taking into account 10% of the most quoted academic publications, Italy ranks third in Europe and fifth in the world (Istat- Italian Statistical Data Institute).





## USEFUL LINKS

### Universities (\*)

[www.cruai.it](http://www.cruai.it) - **CRUI** - Conferenza dei Rettori delle Università Italiane

[www.polimi.it/en/](http://www.polimi.it/en/) - **Politecnico di Milano**

[www.santannapisa.it/en](http://www.santannapisa.it/en) - **Sant'Anna School of Advanced Studies** - Pisa

[www.unibo.it/en/homepage](http://www.unibo.it/en/homepage) - **Alma Mater Studiorum** - Università di Bologna

[www.uniroma1.it/en/pagina-strutturale/home](http://www.uniroma1.it/en/pagina-strutturale/home) - **Sapienza Università di Roma**

[www.sns.it/en](http://www.sns.it/en) - **Scuola Normale Superiore di Pisa**

[www.unipd.it/en/](http://www.unipd.it/en/) - **Università degli Studi di Padova**

[www.unimi.it/en](http://www.unimi.it/en) - **Università degli Studi di Milano** - La Statale

[www.polito.it/index.php?lang=en](http://www.polito.it/index.php?lang=en) - **Politecnico di Torino**

[www.unitn.it/en](http://www.unitn.it/en) - **University of Trento**

[www.unipi.it/index.php/english](http://www.unipi.it/index.php/english) - **Università di Pisa**

[www.unina.it/en\\_GB/home](http://www.unina.it/en_GB/home) - **Università di Napoli** - Federico II

[www.unifi.it/changelang-eng.html](http://www.unifi.it/changelang-eng.html) - **Università di Firenze**

[www.ucsc.it/](http://www.ucsc.it/) - **Università Cattolica del Sacro Cuore** - Milano

<https://en.uniroma2.it/> - **University of Rome Tor Vergata**

<https://en.unito.it/> - **University of Turin**

[wcm-3.unipv.it/site/en/home.html](http://wcm-3.unipv.it/site/en/home.html) - **Università degli Studi di Pavia**

<https://en.unimib.it/> - **University of Milano** - Bicocca

<https://unige.it/en> - **Università di Genova**

<https://en.unisi.it/> - **Università di Siena**

[www.units.it/en](http://www.units.it/en) - **University of Trieste**

[www.unive.it/pag/13526/](http://www.unive.it/pag/13526/) - **Ca' Foscari University of Venice**

[www.international.unimore.it/](http://www.international.unimore.it/) - **Università degli Studi di Modena e Reggio Emilia**

[www.unipg.it/en/](http://www.unipg.it/en/) - **Università degli Studi di Perugia**

<https://en.unibs.it/> - **Università degli Studi di Brescia**

[www.en.poliba.it/](http://www.en.poliba.it/) - **Politecnico di Bari**

[www.unict.it/en](http://www.unict.it/en) - **Università degli Studi di Catania**

[www.unife.it/it/internazionale](http://www.unife.it/it/internazionale) - **Università degli Studi di Ferrara**

<https://web.unisa.it/en/home> - **Università degli Studi di Salerno**

[www.uniud.it/en/uniud-international?set\\_language=en](http://www.uniud.it/en/uniud-international?set_language=en) - **Università degli Studi di Udine**

[www.uniroma3.it/en/](http://www.uniroma3.it/en/) - **Roma Tre University**

[www.unipa.it/mobilita/en/](http://www.unipa.it/mobilita/en/) - **Università degli Studi di Palermo**

[www.uniba.it/english-version/university-of-bari-aldo-moro](http://www.uniba.it/english-version/university-of-bari-aldo-moro) - **Università degli Studi di Bari Aldo Moro**

<https://en.unipr.it/> - **Università di Parma**

[www.univr.it/en/home](http://www.univr.it/en/home) - **Università di Verona**

(\*) best ranking according to the QS World University Rankings 2020



**Italy** is among the **most automated Countries** in the world and sixth in the world **exports of industrial robots**.

According to the International Federation of Robotics chart, Italy ranks 8<sup>th</sup> among the **most automated Countries in the world**, with 185 robots every 10 thousand employees. It accounts for more than double the global average (74 units every 10 thousand employees).

In 2018 **Italy** ranked 7<sup>th</sup> for number of **robots produced annually** with 8,300 units.

**Italian cyber security industry** is worth 1,37 bn Euro. From 2017 to 2019 Italian companies producing **cyber security solutions increased by 300%**. In 2020 the sector counts counts **2.800 unities** and employs **23.300 workers**.



## USEFUL LINKS

### Innovation and Research

[www.cnr.it/en](http://www.cnr.it/en) - **Consiglio Nazionale delle Ricerche**

<https://home.infn.it/en/> - **INFN - National Institute for Nuclear Physics**

[www.inaf.it/en?set\\_language=en](http://www.inaf.it/en?set_language=en) - **INAF** - National Institute for Astrophysics

<https://iit.it/> - **IIT** - Istituto Italiano di Tecnologia

[www.fbk.eu/en/](http://www.fbk.eu/en/) - **Fondazione Bruno Kessler**

[www.humantechnopole.it/en\\_GB/home](http://www.humantechnopole.it/en_GB/home) - **Human Technopole**

[www.confindustriasi.it](http://www.confindustriasi.it) - **Confindustria Servizi Innovativi e Tecnologici**

[www.cdpventurecapital.it](http://www.cdpventurecapital.it) - **CDP Venture Capital Sgr** - Fondo Nazionale Innovazione

### Business Incubators - Digital Innovation HUB

[www.i3p.it/en/](http://www.i3p.it/en/) - **I3P** - Incubatore Politecnico di Torino

[www.polihub.it/en/](http://www.polihub.it/en/) - **POLIHUB** - Innovation Districts & Startup Accelerator

[www.torinowireless.it/?lang=en](http://www.torinowireless.it/?lang=en) - **TorinoWireless**

<http://preparatialfuturo.confindustria.it/digital-innovation-hub/cosa-sono/> - **DIH** - Digital Innovation Hub

<https://nastartup.it/nastartup/> - **Startup Ecosystem Accelerator** - Napoli

<https://startup.enel.com/it/innovation-hub/catania.html> - **Enel Innovation Hub & Lab Catania**

<https://startup.enel.com/it/innovation-hub/milano.html> - **Enel Innovation Hub & Lab Milano**

<https://startup.enel.com/it/innovation-hub/pisa.html> - **Enel Innovation Hub & Lab Pisa**

[www.intesanpaoloinnovationcenter.com/en](http://www.intesanpaoloinnovationcenter.com/en) - **Intesa Sanpaolo Innovation Center**



Italy has been the second country in the world launching a civil satellite into the orbit.

Third contributing country to the European Space Agency (2019 ESA Budget).

Italy contributes to more than 40% of the International Space Station's budget through the Agenzia Spaziale Italiana - ASI and companies from the private sector.

Among Italian artificial satellites, *Prisma* deserves particular mention: it is one of the most advanced ever built so far for its instrumental features. Italian radar *Marsis* identified a large saltwater lake 1.5 km underneath the red planet's South Pole. It is the first discovery of water ever found on the Red Planet.



## USEFUL LINKS

### Space, Aerospace and Defense

[www.asi.it/en/](http://www.asi.it/en/) - ASI - Agenzia Spaziale Italiana

[https:// aiad.it](https://aiad.it) - AIAD - Federazione Aziende Italiane per l'Aerospazio, la Difesa e la Sicurezza

### Italian Technological Parks

[www.apsti.it/en/home-2/](http://www.apsti.it/en/home-2/) - The Italian Scientific and Technological Parks Network

[www.sardegna.ricerche.it/attivita/parcotecnologico](http://www.sardegna.ricerche.it/attivita/parcotecnologico) - Parco Scientifico e Tecnologico della Sardegna

[www.comonext.it/en/](http://www.comonext.it/en/) - ComoNExT Innovation Hub - Lombardia

[www.carniaindustrialpark.it/en/](http://www.carniaindustrialpark.it/en/) - Carnia Industrial Park - Friuli Venezia Giulia

[www.great-campus.it/en/](http://www.great-campus.it/en/) - GREAT Campus - Genoa Research & Advanced Technology - Liguria

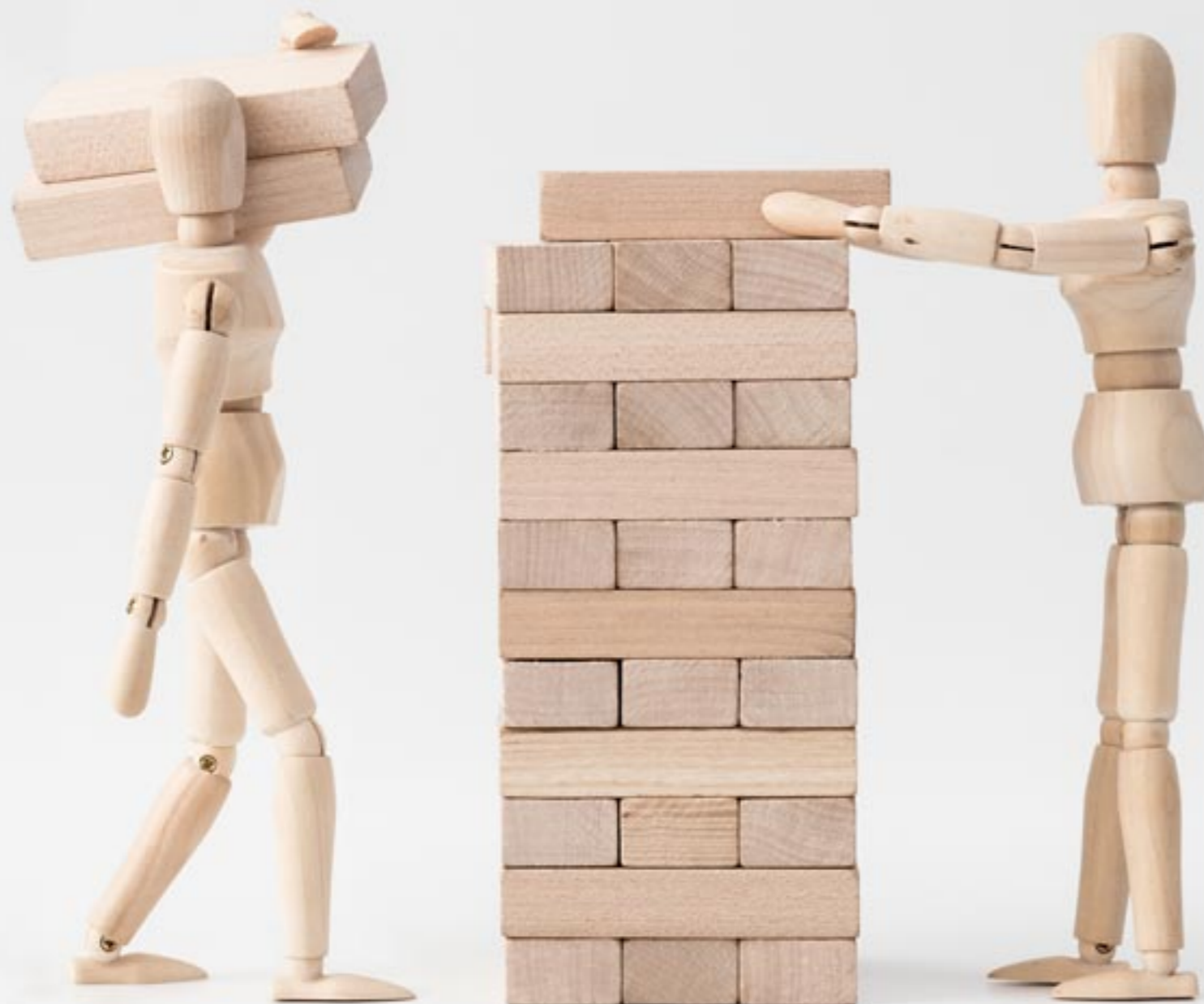
<https://polomeccatronica.it/en> - The Mechatronic Industry in Rovereto - Trentino Alto Adige

[www.kilometrorosso.com/en/](http://www.kilometrorosso.com/en/) - Kilometro Rosso Innovation District Bergamo - Lombardia

[www.tecnopolo.it/tecnopolo-tiburtino-2/](http://www.tecnopolo.it/tecnopolo-tiburtino-2/) - Tecnopolo Tiburtino - Lazio

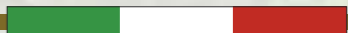
[www.tecnopolo.it/tecnopolo-castel-romano-2/](http://www.tecnopolo.it/tecnopolo-castel-romano-2/) - Tecnopolo Castel Romano - Lazio





## WOOD INDUSTRY

**Italy** is **second in the world** for trade surplus and **first** for exports in this sector among **European countries**

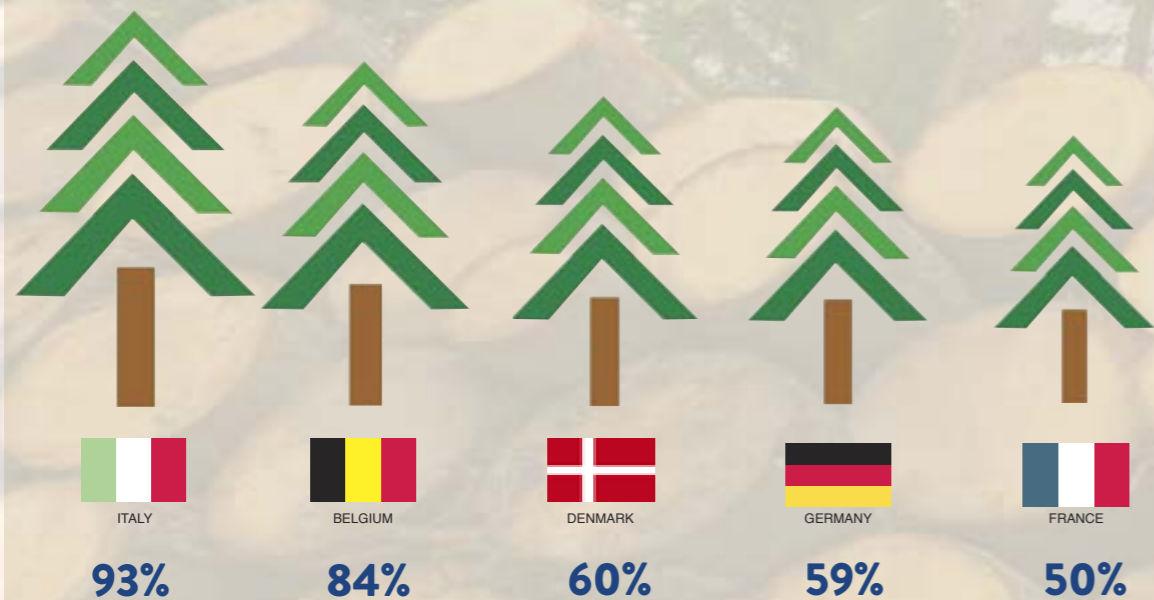


Italy is 2<sup>nd</sup> in the world for trade surplus: about 10 bn preceded only by China (85.3 billion) but ahead of Poland (9.7 billion), Mexico (6.8 billion), Vietnam (5.2 billion) and Germany (-3.5 billion).

First European exporting country in this sector: 30% of the total EU exports.



SHARE OF RECYCLED WOOD CHIPBOARDS OUT OF THE TOTAL, FIRST EU COUNTRIES, 2018 (% VALUES)



Source: Fondazione Symbola, Italy in 10 Selfie, 2020

### MAIN INDUSTRIAL DISTRICTS AND ASSOCIATIONS

Fabriano, Pesaro, Casalasco-Biadanese, Brianza, Alto Adige, Bassano, Livenza e Quartier del Piave, Alta Valle del Tevere, Quarrata, Burgia, Forlì, Bovolone, Abruzzo, Manzano, Treviso, Venezia, Calangianus

[www.federlegnoarredo.it](http://www.federlegnoarredo.it) – **FEDERLEGNOARREDO**

[www.confartigianato.it/come/categorie/legno-e-arredo/](http://www.confartigianato.it/come/categorie/legno-e-arredo/) - **CONFARTIGIANATO IMPRESE**

[www.acimall.com/en/](http://www.acimall.com/en/) - **ACIMALL** - Italian Woodworking Technology Association

[www.salonemilano.it/en/exhibitions/salone-internazionale-del-mobile](http://www.salonemilano.it/en/exhibitions/salone-internazionale-del-mobile) - **SALONE DEL MOBILE. MILAN**





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