FEDERCHIMICA
CONFINDUSTRIA

International Year of
CHEMISTRY
2011

THE CHEMICAL INDUSTRY IN ITALY

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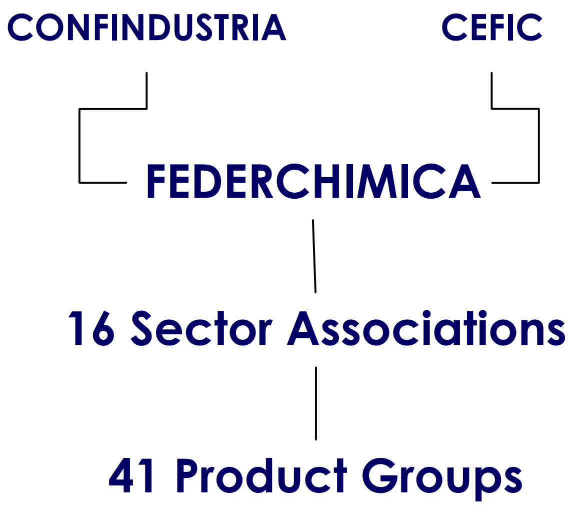
Introduction

This publication aims at providing key elements to describe to an international reader the chemical industry in Italy, its companies and main development trends that characterise its growth.
The Italian chemical industry is represented by Federchimica.
Federchimica is member of Confindustria, the Confederation that groups all the Italian industrial sectors, and of Cefic, the European Chemical Industry Council.
In order to represent in the best way the chemical industry in Italy, 16 Sector Associations operate in Federchimica, which represent 41 Product Groups and nearly 1,300 companies.



The 16 Sector Associations of Federchimica

AGROFARMA
Crop protection products

AISA
Animal health-care products

AISPEC
Abrasives
Additives and auxiliaires for textile, leather, paper-making, tanning industry and water treatment
Additives and auxiliaires for detergents, polymerization and surface-active agents
Additives and auxiliaires for polymers, elastomers, coating and others
Food additives and processing aids
Starches, organic acids and yeasts
Flavors and fragrances
Lubricant manufacturers
Financial service, engineering and research in the chemical industry
Intermediates, active ingredients, catalysts and fine chemicals
Ingredients for dietary supplements and functional food
Raw materials for cosmetic industry and additives for cosmetic and pharmaceutical industry
Photosensitive products
Bitumen sheets for waterproofing
Renewable sources

ANIFA
O.T.C. medicines (self-medication medicines)

ASCHIMFARMA
Pharmaceutical raw materials and Intermediates

ASSOBASE
Organic base chemicals
Inorganic base chemicals
Surfactants and raw materials for detergents

ASSOBIOTEC
Products and processes of biotechnological origin

ASSOCASA
Detergents, maintenance and hygiene products (biocides)

ASSOFERTILIZZANTI
Mineral fertilizers
Organic and organo-mineral fertilizers and soil conditioners
Specialty fertilizers

ASSOFIBRE CIRFS ITALIA
Cellulosic and synthetic continuous filaments for apparel and home furnishing
Synthetic staple, tow and tops for apparel and home furnishing
Cellulosic and synthetic fibres for industrial use

ASSOGASLIQUIDI
LPG for Combustion
LPG for Traction

ASSOGASTECNICI
Technical and special gases
Medical gases

AVISA
Adhesives and sealants
Paints and varnishes
Printing and silk-screen inks

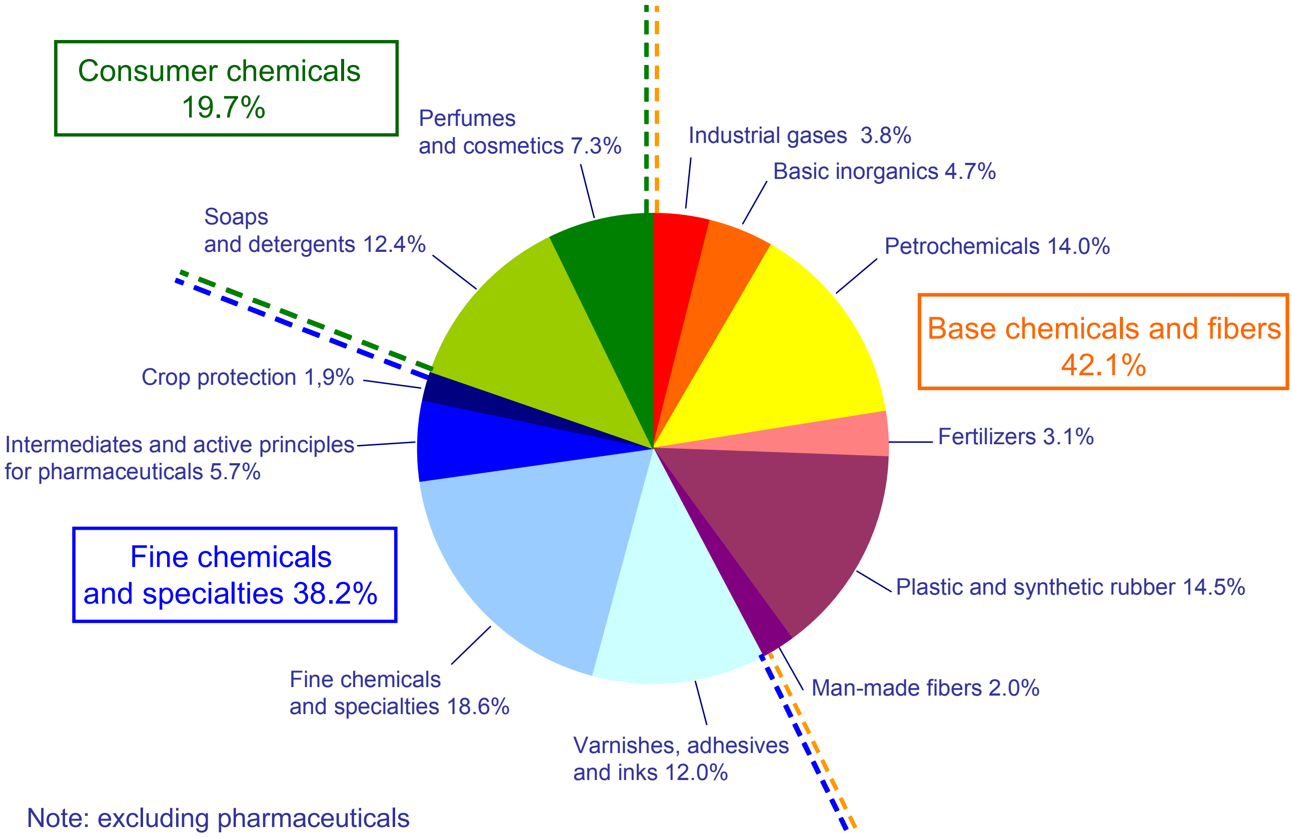
CERAMICOLOR
Ceramic glaze, inorganic pigments and metal oxides

PLASTICS EUROPE ITALIA
Compounds and auxiliaries for plastic, plasticizers and other related products
Advanced materials
Thermosetting resins and system
Thermoplastic resins and system

UNIPRO
Cosmetic products for distribution through mass-market
Distribution through pharmacies
Distribution perfumeries, herbalist's shops
Professional products for hairdressers
Professional products for beauty institutes
Processing for third parties

Italian chemical production by sector

(share on total)



Note: excluding pharmaceuticals

Source: Federchimica on Istat, year 2008

Chemical industry in Italy

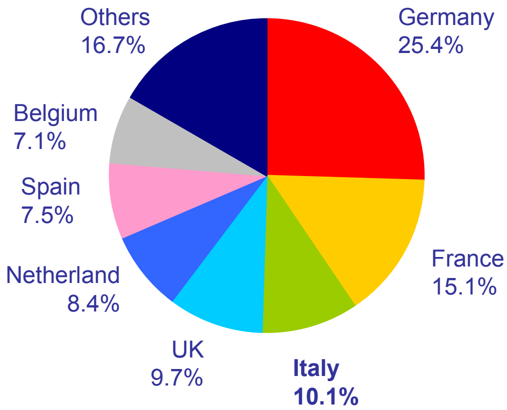
Italy - with a turnover of about 53 billion Euros in 2010 - represents the third main producer of chemicals in Europe. Almost 3 thousand companies are active in the sector employing about 115 thousand people.
Being a country with a strong industrial basis, Italy represents a large market for chemicals accounting for more than 62 billion Euros.
For many products Italian market ranks even second in Europe. The country can take advantage from its positioning in the centre of Mediterranean. Because of these reasons, many chemical foreign owned companies have decided to place here their strategic basis to manage operations in Southern Europe.

Key features of the Italian chemical industry, 2010

Billion Euros (if not differently specified)	Chemical industry	Chemicals and pharmaceuticals
Production value	52.6	79.1
Exports	22.6	36.5
Imports	32.1	49.4
Domestic market	62.1	92.0
Companies (number)	2800	3328
Employees (thousands)	114.5	179.8

Source: Federchimica estimates on Istat

Italy is the third EU chemical producer



Source: Cefic Chemdata International, Federchimica, year 2010

Partnership with Industrial Districts

The most famous feature of Italian economic system is probably represented by Industrial Districts: these may be defined as an agglomerate of small and medium-sized firms, specialised in a single-product business, concentrated in a specific geographic area. Such a productive system makes it possible for companies to face competition maintaining their limited dimension.
There are about 200 Industrial Districts in Italy and most of them show very strict connections with chemicals. Enterprises from Industrial Districts are known around the world for their high quality and innovative products. To do that they often work in partnership with Italian chemical companies, which are able to develop sophisticated intermediate products responding to any specific requirement.
Investing in the chemical industry in Italy means catching the opportunity to find many different customers with high propensity to risk testing together new products.
On the other hand, choosing Italian chemical products means enjoying the secret upon which relies the success of Italian industrial districts.

Chemical products are crucial for the Italian Industrial Districts success

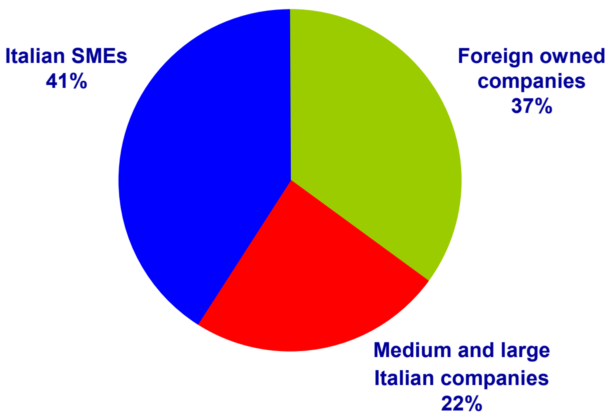
Most important Italian districts for the chemical industry

Biella - Prato	textiles
Como	silk products
Brianza – Alto Livenza	furniture
Premana	scissors
Milan - Varese	plastics processing
Bergamo	buttons
Sassuolo	ceramic tiles
Castel Goffredo	women's hosiery
Vigevano	shoe making
Verona – the Apuan Alps	marble-stones
Rossano Veneto	saddles for bicycles
Cadore	eyewear- frames
Pesaro	kitchen furniture
Arzignano – Santa Croce	tanning
Vicenza - Arezzo	jewellery
Montebelluna	sportshoes
Rimini – Forlì - Pesaro	wood working
Bologna	packaging
Fermo	footwear
Murgia region	couches

Thousands of SMEs and a relevant foreign presence

Chemical industry in Italy is characterised by the well balanced presence of three different actors, all of them playing a very important role: Italian SMEs, Italian medium and large companies and foreign owned companies.
SMEs play a very important role in many European countries but their presence is particularly important in Italy where they account for 41% of the total value of production. Such companies are active especially in fine and specialty chemicals where scale economies are not very relevant and the key of success often consists in offering to customers tailor made products.
Foreign owned companies producing in Italy are more than 200, employ about 34 thousand workers and represent 37% of the whole Italian chemical production value. With a value of 6.6 billion Euros they account for 41% of total exports of the Italian chemical industry testifying that their presence in Italy is not aimed only at serving the domestic market and that Italy is considered as a valuable productive base. Many of them also realize R&D activities in Italy.

Distribution of Italian chemical production



Note: are considering large companies those with world sales above 100 million Euros

Source: Federchimica

Italian leaders at European or global level

Medium and large Italian companies represent 22% of the whole chemical production. There are some big players of basic chemicals, but also several very dynamic medium and medium-large enterprises. Main Italian chemical companies usually focus their activity on very specific families of goods, offering a wide product range in order to satisfy every demand on a particular market. Thanks to high technological content of products and strong service offer, many of them are now market leader in their specific niche at European or even World level. Many are active on foreign markets not only with a commercial presence, but also with production units.

Main Italian chemical companies - 2010

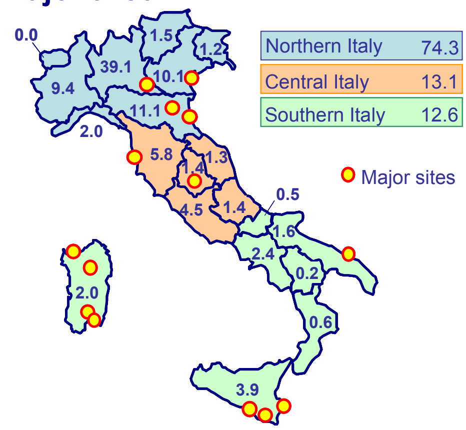
(millions of Euro)	World sales	Production in Italy
Polimeri Europa	6138	4821
Gruppo Mossi & Ghisolfi	1970	383
Gruppo Mapei	1832	744
Radici Group	1161	605
Gruppo Bracco	719	527
Gruppo P & R	692	487
Polynt Group	614	483
Gruppo C.O.I.M	550	327
Gruppo SOL	519	302
Gruppo Colorobbia	470	211
Gruppo SIAD	452	265
Gruppo Acquafil	432	249
Gruppo Sapio	431	414
Gruppo Lamberti	368	253
Dobfar Holding	315	271
Gruppo Sipcam-Oxon	310	142
Intercos Group	267	134
Gruppo Zobele	258	54
Sadepan Chimica	255	185
Gruppo Desa	210	210
Isagro	204	104
Esseco Group	203	104
Montefibre	190	-
F.I.S.- Fabbrica Italiana Sintetici	178	178
FACI	165	80
3V Partecipazioni Industriali	157	93
Reagens	154	81
Indena/Gruppo IdB Holding	145	115
Inver	128	91
ICR – Industrie Cosmetiche Riunite	121	121
Alcea	120	80
Sinterama	117	62
Index	116	116
Zach System	115	77
Silvateam	111	80
Gruppo Bozzetto	110	65
Deborah Group	106	82
Paglieri	104	104
Sabo	103	103
Syndal – Attività diversificate	101	101

Note: companies with a majority of Italian capital share; excluding pharmaceuticals.
Source: Federchimica

The geography of Italian chemical industry

The Italian chemical industry is concentrated in the North of the country, close to downstream European markets and local customer companies. Northern Italy accounts for about 74% of chemical employment. Lombardia, representing more than half of it, has a real vocation for chemicals: it is the first chemical region in Europe in terms of employees and for number of companies.
In the country there are some important chemical sites, also in the South and in Islands. These offer very interesting foreign investment opportunities thank to their logistic feature, availability of highly qualified workforce and investment support schemes.

Distribution of chemical employment and major sites



Note: chemicals and pharmaceuticals
Source : Federchimica, Istat

Lombardia is the first European chemical region

Number of chemical employees

1.LOMBARDIA	78 616
2.Rheinland(DE)	75 915
3.Ile de France (FR)	72 412
4.Bayern (DE)	61 146
5.Cataluña (ES)	60 022
6.Hessen (DE)	59 145
7.Baden-Wuttemberg (DE)	58 732
8.Pfalz (DE)	54 544
9.Vlaams Gewest (BE)	41 917
10.Rhône-Alpes (FR)	31 825
11.Westfalia (DE)	26 642

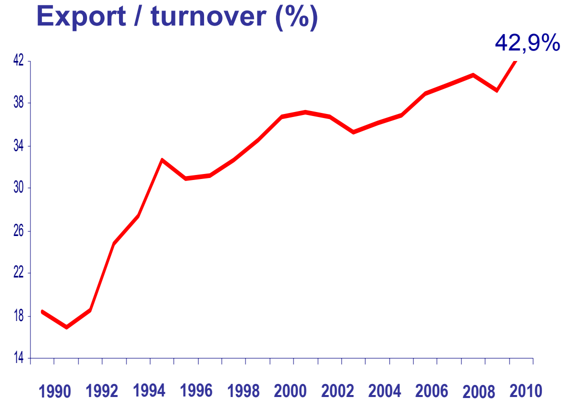
Note: chemicals and pharmaceuticals
Source: Eurostat, year 2007

An increasing international attitude

Italian chemical companies are taking advantage of globalization by offering their international customers the same solutions enforcing partnership with domestic clients: innovation, customization, flexibility, just-in-time and fulfilment to requirements. Exports to turnover ratio has grown from 18 to 43% in 20 years. Not only large firms, but also SMEs are strongly oriented to international markets.
Other EU countries are Italian main trade partners but Asia and Eastern Europe are gaining importance. Extra EU surplus is more than 700 million Euros (in 2010). Export performance has been positive especially in downstream chemicals. Italy is world leader in producing active pharmaceuticals ingredients for generics and enjoys significant trade surpluses in detergents and cosmetics (1.2 billion Euros in 2010) and varnishes and adhesives (707 million).

Increasing propensity to export

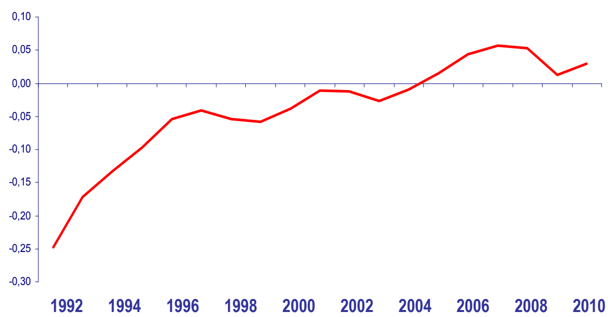
Export / turnover (%)



Source: Istat

Very good performance in downstream chemicals

Trade balance / (exports + imports)



Source: Istat

Innovation in the Italian chemical industry

For Italian chemical enterprises R&D represents a key activity in order to be considered valuable partners from customers.
Actually, in Europe Italy is second only to Germany for number of innovative chemical companies (nearly 1200) and also for number of companies with R&D activity.
The possibility for downstream sectors to offer innovative products often stems from the developing of new chemical intermediates with specific properties.
Chemical companies constantly innovate also to improve processes as well as environmental standards. Not only major companies, but also smaller ones are strongly engaged in innovation. In the last years, according to a recent survey of Federchimica on innovation, more than 70% of chemical firms has been strengthening R&D as it is considered critical for facing increasing international competition.
In Italy a good number of graduates in chemistry and chemical engineering is available. The quality of Universities is excellent as proved by the considerable number of scientific publications obtained.
For chemical companies making research means more and more entertaining strong relationship with Universities and Research Institutes. In particular, there are important opportunities to cooperate with the National Research Council (CNR), whose activity regards base research as well as technology transfer and the developing of new applications. Federchimica has signed an agreement with CNR in order to promote such cooperation. Moreover, in Italy are located 27 Scientific and Technological Parks with specific competencies on chemicals and bio-medicals.

Italy is the second EU Country for number of innovative chemical companies

	Germany	Italy	France	Spain
Innovative companies	1508	1172	820	985
Companies with intra-muros R&D	1323	834	714	675

Note: companies with more than 10 employees
Source: Eurostat, Community Innovation Survey, 2000-2008

Advanced industrial relations and competitiveness

High quality employees, competitive labour costs and industrial relations with strong innovative content and collaborative bargaining attitude with Trade Unions: this is probably one of the best asset of the Italian chemical industry. With the objective of pursuing the necessary flexibility of labour in the awareness and continuous respect of the importance of human resources, Italian chemical companies may benefit of a wide flexibility as regard to:

- opening clauses allowing firms and Trade Unions to define at company level different and less expensive rules than the national collective bargaining;
- daily and weekly working time which may be defined at company level respecting the average yearly working time;
- wages through the "Participation premium" (implemented at company level as a variable part of an annual salary and linked to productivity and economic performance).

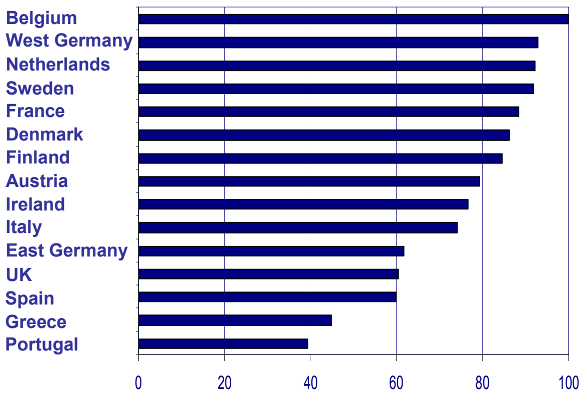
Other Italian feature affect

- participation of employees to the costs of their lifelong learning;
- new rules concerning apprenticeship which led to significant labour cost savings.

Finally, the strong commitment in strengthening both workers' and firms' interests has led to the creation of Fonchim and FASCHIM, the sectorial pension and medical funds.

In Italy qualified employees and competitive labour costs

Hourly average labour cost in the chemical industry
(index Belgium = 100)



Source: BAVC, year 2008

What foreign companies managers appreciate of chemicals in Italy

Recently a survey conducted by Federchimica among the top managers of major foreign chemical companies producing in Italy, indentified the strength points of the Italian chemical industry.

- *Quality of human resources*

Italian employees are generally appreciated for their creativity and flexibility. Creativity is recognised as a real professional skill as it turns into innovation propensity and problem solving capability. Flexibility mixed up with creativity, generates high responsiveness to changes, orientation to continuous improvement and capability to work under pressure. Moreover high level technical and scientific skills are available in Italy.

- *Market size and quality of its customers*

Italy, given its relevant manufacturing base, represents one of the largest markets in Europe for chemical products. Another point of strength derives from the distinctive features of Italian chemical customers. The typical Italian customer is very demanding, as a cons-quence a product developed for Italy con easily be sold all over the World. In addition in Italy there are many customers, in particular SMEs belonging to the traditional sectors of the Made in Italy, which are world trend setter, very open to innovation and always ready for testing and developing new products.

- *Quality and reliability of equipment suppliers*

Creativity, flexibility and high level of technical and scientific skills do not regard only the chemical sector but all the value chain. In particular the quality and reliability of equipment suppliers make it possible to carry out quick changes at low costs with personalised and innovative solutions.

- *Innovation and research*

Multinational companies often carry out R&D in "centres" which are generally located in one Country and work for the whole group by defining research strategies and by coordinating all the research projects related with a particular business line. In many relevant cases Italy has been selected as an "R&D centre" for a well defined business segment.

Italy is a suitable location for doing R&D.

- Italian chemical graduates are well prepared, have a strong theoretical background and are also very motivated;
- a specific know how, sometimes even considered unique, is available in different areas (fluorine chemicals, woven and non-woven polyester, polyurethanes, special polymers, leather chemicals, adhesives, pharmaceuticals active principles, cleaning additives);
- research groups are competitive in terms of costs and results, in particular they are able to understand and anticipate market needs.

Strengths of the Italy-based chemical industry

Human resources

Creativity
Flexibility
Capability to adapt and quickly react to changes
Orientation to continuous improvement
Capability to work under stress
Know how in specific chemical areas

Features of Italian market

Third European market (about 70 billion Euros)
Demanding and high quality customers
Customers being trend setter
Great number of SMEs
Widespread entrepreneurship
Willingness to collaborate for developing and testing new products

R&D

High quality graduates
Know how in specific chemical areas
Competitiveness in terms of costs and results
Capability to understand markets needs
Creativity and problem solving attitude
Applied research and product development

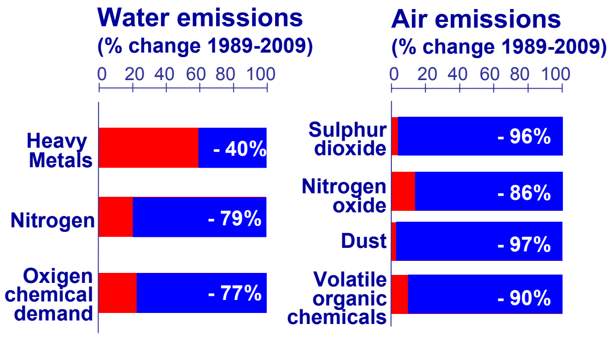
Quality and reliability of equipment suppliers

Technical and scientific skills
Personalized and innovative solutions

A strong commitment for safety and environment

Italian chemical companies are strongly engaged in Sustainable Development. Such a commitment requires significant investments (about 1,3 billion Euros in 2009) and has produced concrete results.
In fact, all main environmental indicators register a very significant performance and the chemical industry is now one of the safety sectors in Italy.
In Italy Federchimica has been managing the worldwide Responsible Care Program together with its member companies for more than 15 years.

Social responsibility produces concrete results



Source: Federchimica - XVI Rapporto Responsible Care®, 2010

Injures
(numbers per million of hours worked)*

Metals	44,0
Non-metallic mineral products	25,9
Wood	25,8
Rubber and plastic	24,1
Food products	20,5
Transport equipment	20,2
Machinery and equipment	18,5
Paper	13,7
Electrical equipment	10,8
Leather	10,6
Textiles	10,3
Chemicals	9,1
- Responsible Care®	8,5
Coke and petroleum products	6,3

*average 2007-2009
Source: Federchimica - XVI Rapporto Responsible Care®, 2010

REACH regulation implementation

The REACH Regulation, entered into force in European countries on 1st June 2007, represents a great innovation in the assessment and management of risks posed by chemicals to the health and the environment. Based on the principle "no data, no market", it shifted the responsibility to provide data and to demonstrate the safety of chemicals to the Industry.
In this new system, manufacturers and importers have to provide information for all substances produced or imported in quantities of 1 ton or more per year, through a registration dossier to be submitted to the new European Chemicals Agency. Federchimica and Assolombarda (Regional Lombardy Industrial Association) – together with other institutions in representation of operators in all production sectors in the country – in 2007 founded Centro Reach, a company with limited liability (Ltd). The mission of Centro Reach is to support chemical companies involved in production in Italy or in other countries as well as in importing from non-EU countries, and over more than 100,000 downstream users in numerous sectors how to apply the REACH Regulation.
This support is specifically oriented towards SMEs, the most typical company size in the Italian production system.
Centro Reach provides advisory and consultancy services in mainly 4 areas, ie.:

- Company Consultancy
  - analysis of product portfolio and assistance for decision - action plans ;
  - preparation of the technical dossier for registration, late pre-registration, inquiries
  - connection with ECHA and national competent authorities, for the assessment procedures, authorisations or restrictions;
  - updating of safety, classification and labelling procedures, safety data sheets.
- SIEF (Substance Information Exchange Forum) and Consortia
  - support in sharing of information for chemical substances within the SIEF;
  - assistance in preparation and involvement in registration consortia;
  - representation of companies in consortia.
- Training courses
- R&D and Methods

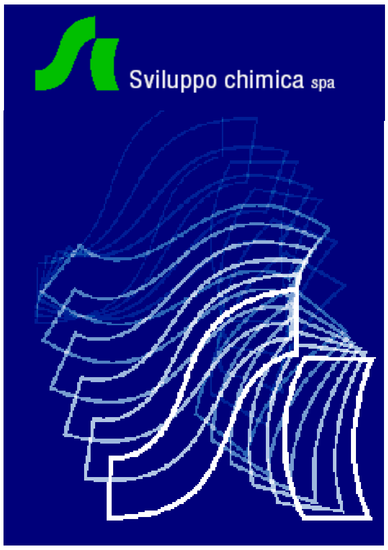
centroReach

Quality and certifications

Italian chemical companies consider that care for quality products and processes as well as commitment to responsible production – which means preserving workers and consumers health and the environment – represent a crucial competitiveness factor.
During the last years, Certification of Quality, Environment and Safety has been growing significantly. As a consequence, compared to other sectors, the chemical industry shows the best performances with respect to process certification according to ISO 9000, ISO 14001 and EMAS standards.
Such a result has been obtained thanks to the contribution of Certiquality, the certification body founded by Federchimica in order to provide a highly qualified certification service to its member companies. Certiquality covers a very central position in the certification scenario, with more than 10 thousand certifications issued in Europe and in many other extra European countries. Within the chemical sector, it represents the specialised partner both for Italian and foreign companies.
More info can be obtained at the following link www.certiquality.com

SC Sviluppo Chimica, Federchimica service company

SC Sviluppo Chimica, a service company fully owned by Federchimica, offers support to chemical companies operating in Italy by providing professional advise over a broad range of areas such as research and innovation, management, training, logistics, product safety and protection of employees, consumers and environment.
SC offers as well services focused over territory development in close cooperation with private investors, public institutions and their agencies responsible for investment attraction.
SC pursues the strengthening of chemical companies financial structure working with venture and development capital funds, public and private financial institutions in order to achieve the most suitable strategy for spin off, start-up and first-expansion businesses in the chemical sector.



How to get in touch
and gather more information

Federchimica
English version of the official website of Federchimica, industrial association of chemical companies in Italy.
www.federchimica.it/EnglishVersion.aspx

Cheminitaly
Complete information about locations and products of Italian chemical companies.
www.cheminitaly.it

Federchimica data and analysis
Features and statistics, short term outlook and studies on Italian chemical industry.
www.federchimica.it/DATIEANALISI.aspx
aei@federchimica.it

Italian Institute for Foreign Trade (ICE)
With 115 offices around the world, ICE can be easily contacted to get punctual information about Italian chemical companies.
www.italtrade.com

SC Sviluppo Chimica
Professional services at 360 degrees to the chemical sector in order to support its competitiveness, foster innovation and environmental performances.
http://www.federchimica.it/Federchimica/SocietaControllate/SviluppoChimica.aspx

Centro Reach
Provides professional consultancies to let SMEs of the chemical industry and Downstream Users accomplish to the REACH Regulation and to the related regulations for the responsible management of the chemicals and of the safety at work.
www.centroreach.it

InvestInItaly
A single interlocutor for foreign investors interested at evaluating location opportunities in Italy, able to provide financial services combined with valuable information.
www.investinitaly.it
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FEDERCHIMICA

Federchimica - the Italian Federation of chemical industry - was founded as the Italian Federation of Chemical Industry Associations in 1920, it became Assochimici in 1945 and was transformed into Federchimica in 1984.

At present more than 1,300 companies, with a total of about 90.000 employees, are part of Federchimica. They are grouped into 16 Associations, which in their turn are divided into 41 product groups.

Federchimica is a member of Confindustria (General Confederation of the Italian Industry) and of Cefic (European Chemical Industry Council).

Federchimica, whose primary objectives are the co-ordination and support of the role of Italian chemical industry as well as the promotion of its development capacity, has the following main goals:

- to produce guidelines in economic, industrial and labour matters and in the areas of environment, innovation and energy policies;
- to promote these policies with Public Authorities, national economic organisations, other entrepreneurial organisations, international organisations to whom the Federation belongs, Trade Unions, environmental and consumer organisations;
- to contribute to the diffusion of a proper image of the chemical industry in the public opinion;
- to carry out studies and projects which inspire and legitimise entrepreneurial choice;
- to contribute to the constant promotion of the quality of member companies, with a particular attention to the organisation of initiatives in the field of innovation.

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ASSOFIBRE CIRFS ITALIA
Synthetic fibres, continuous filament, staple, tow and top

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ASSOGASTECNICI
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OTC Medicines (self-medication)

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ASCHIMFARMA
Pharmaceutical active principles
and intermediates

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ASSOBASE
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and raw materials for detergents

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ASSOBIOTEC
Development of biotechnology

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AVISA
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