FEDERCHIMICA
CONFINDUSTRIA

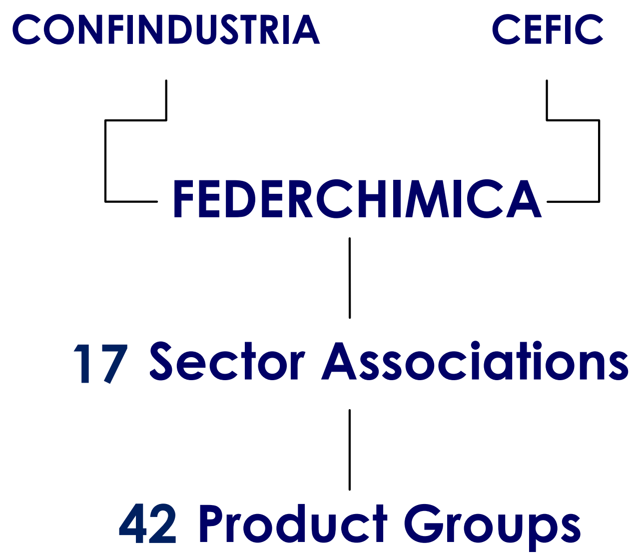
The Chemical Industry in Italy

2017

THE CHEMICAL INDUSTRY IN ITALY

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, 17 Sector Associations operate in Federchimica, which represent 42 Product Groups and nearly 1,400 companies.



The 17 Sector Associations of Federchimica

AGROFARMA
Crop protection products

AIA
Aerosol 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, poly-merization 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
Lubricants
Financial services, 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
Waterproofing products for building (polymer-bitumen membranes)
Renewable sources

ASCHIMFARMA
Pharmaceutical raw materials
and Intermediates

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

ASSOBIOTEC
Biotechnologies

ASSOCASA
Cleaning and maintenance products

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

ASSOFIBRE CIRFS ITALIA
Synthetic fibres for apparel,
home furnishing and industrial use

ASSOGASLIQUIDI
LPG for Combustion
LPG for Traction

ASSOGASTECNICI
Technical and Special gases
Medical gases

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

AVISA
Adhesives and sealants
Paints and varnishes
Printing and screen inks

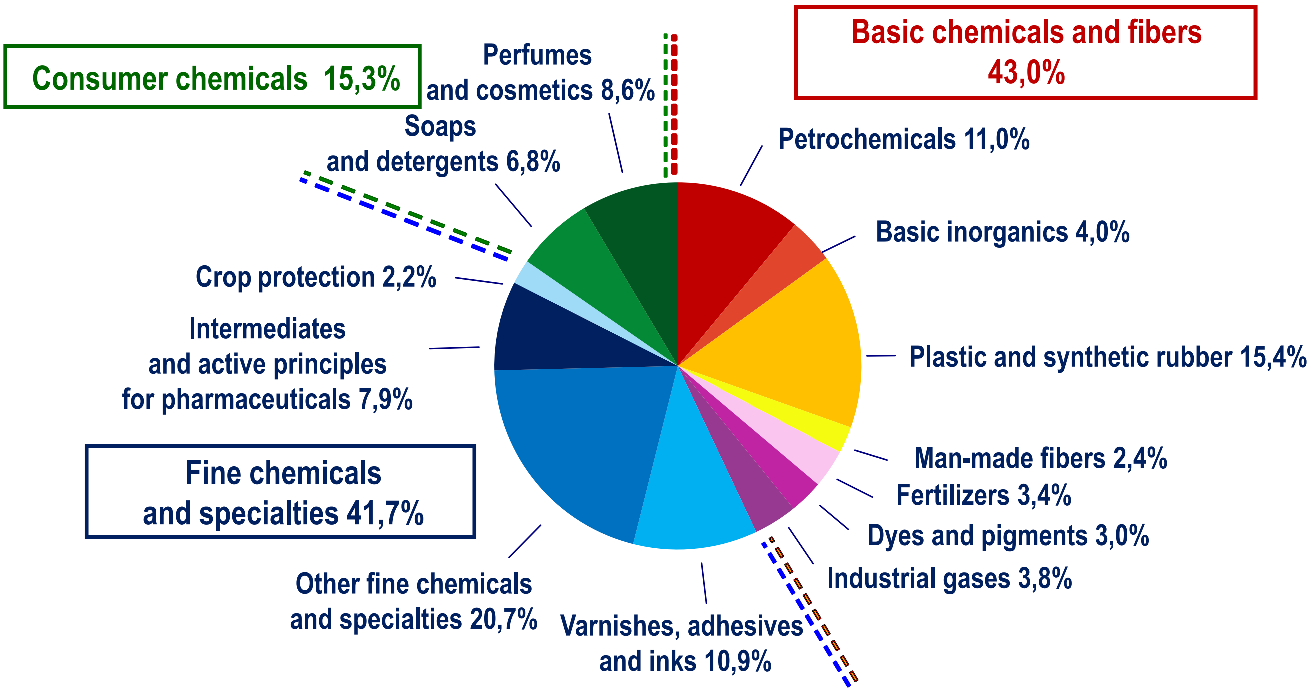
CERAMICOLOR
Ceramic glaze, inorganic pigments
and metal oxides

COSMETICA ITALIA
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

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

Italian chemical production by sector

(% share on total)



Note: excluding pharmaceuticals

Source: Federchimica on Istat, year 2014

Chemical industry in Italy

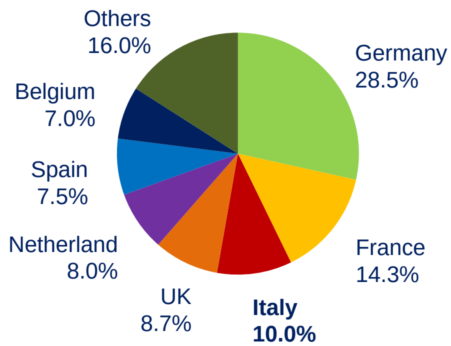
Italy - with a turnover of about 52 billion Euros in 2016 - represents the third main producer of chemicals in Europe. Almost 3 thousand companies are active in the sector employing about 108 thousand people.
Being a country with a strong industrial basis, Italy represents a large market for chemicals accounting for about 59 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.

Main features of the Italian chemical industry, 2016

Billions of Euros (if not differently specified)	Chemical industry	Chemicals and pharmaceuticals
Production value	51,6	81,6
Exports	27,5	48,8
Imports	34,6	57,4
Trade balance	-7,1	-8,6
Domestic market	58,6	90,2
Companies (number)	2.810	3.256
Employees (thousands)	108,1	172,1
Investments	1,7	2,8
R&S expenditures	0,5	1,2
% of manufacturing industry		
Sales	6%	9%
Exports	7%	12%

Note: R&S expenditures and investments, 2014 (last available year)
Source: Federchimica estimates on Istat

Italy is the third EU chemical producer



Source: Cefic Chemdata International, Federchimica, year 2015

Partnership with Industrial Districts

The most famous feature of Italian economic system is probably represented by Industrial Districts (Industrial Clusters): 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 150 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

Firenze - Arezzo - Marche	leather - shoes
Sassuolo	ceramic tiles
Alto Livenza - Brianza - Pesaro	furniture
Cadore	eyewear frames
Arzignano - S. Croce	tanning
Vicenza - Arezzo - Valenza	jewellery
Varese - Torino - Napoli	aeronautics
Fermo - Brenta	shoes
Prato - Vicenza - Biella - Napoli	textiles - cloths
Vicenza	women's hosiery
Treviso - Vicenza - Padova	plastic products
Pordenone - Treviso - Fabriano	domestic appliances
Como	silk products
Montebelluna	sport shoes
Varese - Bergamo	rubber and plastics
Alpi Apuane - Verona	marble
Bologna	motorbikes
Castel Goffredo	women hosiery
Manzano	chairs and tables
Capannori	paper
Murge - Forlì	sofas
Lazio - Milano - Napoli	pharmaceuticals
Padova - Mirandola	biomedicals

Source: Intesa Sanpaolo

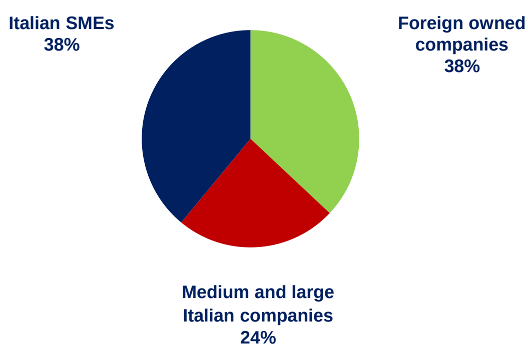
Thousands of SMEs and a relevant foreign presence

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 38% 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 chemical companies in Italy are 270 and employ about 33 thousand workers. They represent 38% of the whole Italian chemical production value and a similar share in terms of export (35%), which demonstrates 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: large companies are those with world sales above 100 million Euros
Source: Federchimica, 2016

Italian leaders at European or global level

Medium and large Italian companies represent 24% 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 supply, many of them are now market leader in their specific niche at European or even World level. Most of them are active on foreign markets not only with a commercial presence, but also with production units: the share of production made outside of Italy has risen from 34% in 2007 to 42%.

Main Italian chemical companies - 2016

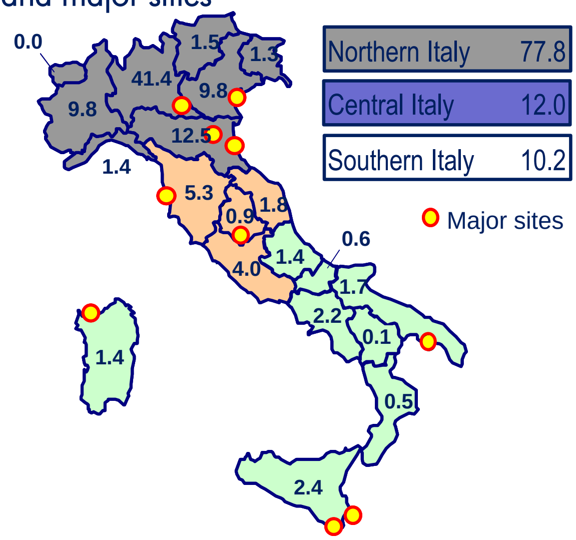
(millions of Euro)	World sales	Production in Italy	(millions of Euro)	World sales	Production in Italy
1. Versalis	4196	3300	26. 3V Partecipaz. Industriali	185	120
2. Gruppo Mapei	2280	485	27. Novamont	176	173
3. Gr. Mossi Ghisolfi	1699	228	28. Mirato Group	169	169
4. Gruppo Bracco	1021	692	29. Sadepan Chimica	167	102
5. Radici Group	946	567	30. Adriatica	165	131
6. COIM Group	737	372	31. Sabo	151	151
7. Gruppo SOL	703	331	32. Gruppo Isagro	150	99
8. P & R Group	675	645	33. Fluorsid Group	144	113
9. Polynt Group	635	499	34. Zach System	142	116
10. Gruppo SIAD	548	434	35. Cosmint	140	136
11. Gruppo Colorobbia	528	198	36. Sinterama Group	130	82
12. Gruppo Sapio	479	446	37. Lechler	127	107
13. Gruppo Aquafil	476	183	38. Silvateam	127	90
14. Gruppo Lamberti	460	253	39. Paglieri	122	122
15. Gr. Sipcam-Oxon	449	227	40. Valagro	118	101
16. Gruppo Intercos	448	239	41. Gruppo Bozzetto	118	60
17. FIS	383	383	42. Gruppo Coswell	117	109
18. ACS DOBFAR	376	371	43. Gruppo SOL.MAR	110	110
19. Esseco Group	333	206	44. Bottega Verde	110	106
20. Italmatch Chemicals	319	118	45. ICAP-SIRA	105	105
21. Gruppo Zobele	306	71	46. Index	96	96
22. Gruppo Desa	232	232	47. Gruppo Sirca	94	91
23. Indena/Gr. IdB Holding	221	185	48. Micys Company	92	79
24. Reagens	218	92	49. Madel	90	90
25. FACI Group	215	84	50. Galstaff Multiresine	85	85

Note: companies with a majority of Italian capital share; excluding pharmaceuticals, statistic based on companies - associated and not- which took part in Federchimica survey.

The geography of Italian chemical industry

The Italian chemical industry is concentrated in the North of the country, close to down-stream European markets and local customer companies. Northern Italy accounts for about 78% of chemical employment. Lombardia, representing more than half of it, has a real vocation for chemicals: it is among the top five chemical regions 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 sities



Note: chemicals excluding pharmaceuticals

Source : Federchimica, Istat 2014

Lombardia: a region with a strong chemical vocation

Number of chemical and pharmaceuticals employees

1.	Nordrhein-Westfalen (DE)	121.884
2.	Hessen (DE)	68.914
3.	Bayern (DE)	68.563
4.	**Lombardia (IT)**	**67.667**
5.	Rheinland-Pfalz (DE)	67.366
6.	Baden-Württemberg (DE)	65.416
7.	Cataluña (ES)	49.878
8.	Île de France (FR)	43.470
9.	Vlaams Gewest (BE)	40.475
10.	Rhône-Alpes (FR)	36.004

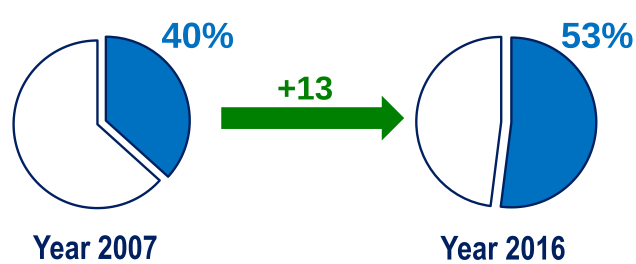
Source: calculations on Eurostat, Istat, INSEE 2014

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.
Since 2007 exports to turnover ratio has increased by 13 percentage points. 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. Export performance is positive especially in downstream chemicals. Italy is world leader in producing active pharmaceuticals ingredients for generics and enjoys significant trade surpluses in home care (584 millions Euros in 2016), cosmetics (2209 millions), paints and varnishes (1253 millions) and in many other specialty chemicals.

Increasing propensity to export

Evolution of export share on turnover in the chemical industry



Very good performance in downstream chemicals sectors

Micro-sectors of specialization of fine and specialty chemicals
(trade balances, year 2016, millions of euro)

COSMETICS = 2.209

DETERGENTS = 584

PAINTS, VARNISHES, ADHESIVES AND INKS
Paints and varnishes = 841
Glues and adhesives = 194
Glazes and ceramic dyes = 57
Mastics and sealants= 64
Solvents and thinners = 59
Inks and Others = 38

SPECIALTIES
Additives for lubricating oils = 519
Catalyst = 202
Plasticizers and stabilizers for rubber and plastics = 139
Products for the treatment of textile and leather = 92
Descaling and similar preparations = 70
Additives for cements = 67

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 chemical companies (nearly 700) 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. According to a survey of Federchimica, about 80% of chemical firms has been strengthening R&D also during the crisis.

In Italy a good number of graduates in chemistry and chemical engineering is available.

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. Moreover, in Italy are located about 30 Scientific and Technological Parks with specific competencies on chemicals and bio-medicals.

Italy is the second EU Country for number of chemical companies with R&D activity

Number of companies with in-house R&D in the European chemical industry

Germany	1.278
Italy	683
Spain	548
France	541
Netherlands	224

Note: companies with 10 employees or more, UK not available

Source: Eurostat - Community Innovation Survey, year 2014

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 efficiency 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:

- daily and weekly working time which may be defined at company level respecting the average yearly working time;
- a job classification system which takes into account the specific organizational needs of enterprises, with simplified rules for SME;
- wages implemented at company level, through collective performance-related pay, linked to productivity and economic performance;
- possibility to temporarily change NCA rules, through company agreement.

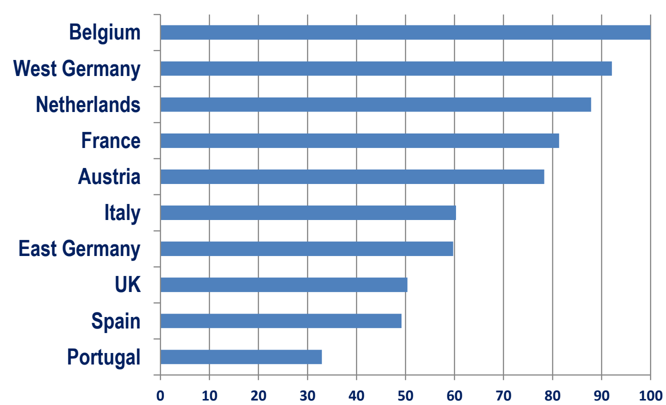
In order to assure an enterprise bargaining functional to competitiveness , NCA provide joint training for Social Parts at company level, planned and manged jointly with Trade Unions.

Finally, the strong commitment in strengthening both workers' and firms' interests has led to the creation of Fonchim and FASCHIM, the sectorial funds for supplementary pension and health insurance, as well as the formalization of a joint commitment at all levels towards the development of shared choices of Social Responsibility.

In Italy qualified employees and competitive labour costs

Hourly average labour cost in the chemical and pharmaceuticals industry

(index Belgium = 100)



Source: BAVC, year 2014

What foreign companies managers appreciate of chemicals in Italy

Among the top managers of major foreign chemical companies producing in Italy, identified the strength points of the Italian chemical industry.

- *Quality of human resources*

Italian employees are generally appreciated for their creativity and flexibility. Creativity is recognized 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 consequence a product developed for 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 63 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

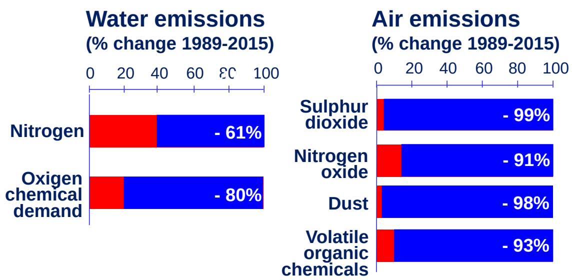
Quality and reliability of equipment suppliers

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 billion Euros in 2015) 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 safest sectors in Italy.
In Italy Federchimica has been managing the worldwide Responsible Care Program together with its member companies for more than 20 years.
From 2006, INAIL (the National Institute for Insurance against Injuries at Work), has signed an agreement with Federchimica. It provides discounted rates for firms participating in the Responsible Care ® program, recognizing their efforts in prevention and safety promotion in the workplace. That agreement has been renoved in 2013 and 2016.

Social responsibility produces concrete results



Injuries

(numbers per million of hours worked)*

Basic metals	24,3
Wood	20,0
Metal products	19,6
Non-metallic mineral products	18,2
Rubber and plastics	17,7
Food	16,6
Paper	16,2
Maintenance	15,9
Furniture	15,5
Other means of transport	14,0
Machinery	13,7
Auto-vehicles	11,9
MANUFACTURING INDUSTRY	**11,9**
Beverages	11,9
Electrical equipment	11,6
Printing	11,4
Textile	10,1
Tobacco	9,9
Chemicals and basic pharma	**9,5**
Other manufacturing industries	8,8
Leather	8,5
Electronics	6,0
Pharmaceuticals	5,8
Wearing apparel	5,6
Coke	4,2

Note: average 2013-2015
Manufacturing industry = median

Source: Federchimica - Responsible Care®

REACH regulation implementation

The REACH Regulation, entered into force in European countries on 1st June 2007, represented 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 European Chemicals Agency (ECHA).
The first two REACH registration deadlines, 30 November 2010 and 31 May 2013, covering 'phase-in' substances (so-called existing substances) manufactured or imported in the EU at tonnages over 100 ton per year brought to a result of registered phase-in substances of around 6.500 out of total number of 25.000 substances which are expected to go through this regulatory process by May 2018.
In 2007 Federchimica, together with other associations, founded the service company Centro Reach Ltd. The mission of Centro Reach is to support chemical companies and users of chemical substances in Italy and in other countries as well as importers of substances from extra-EU countries. More than 100,000 downstream users in numerous sectors are impacted by Reach Regulation and Centro Reach is prepared to help those companies how to apply REACH.
This support is specifically oriented towards SMEs, the most typical company size in the Italian production system. Up to now just a small share of the registrations have been submitted by Italian SMEs but they will be heavily involved in the outstanding 15.000 – 20.000 substances to be registered at the next deadline in May 2018.
Centro Reach provides advisory and consultancy services in several areas, i.e.:

- 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.

- Assistance Safety Data sheets
- Training courses (eventually also at company site)
- R&D and Methods (f.i. QSAR, in-silico)
- Support for Biocides Regulation applications.

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 1400/EMAS and BS OHSAS 18001standards.
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 20 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's service company

SC Sviluppo chimica S.p.a., a service company fully owned by Federchimica, supports chemical companies by offering professional services in several areas: Safety, Product Management, and Industrial Hygiene; Transport and Logistics; Energy and Sustainable Development; R&D and Venture Capital, IT Support, Industrial Relation and National Collective Labour Contract, outsourcing of administrative services.
In order to realize its services, SC Sviluppo chimica S.p.a. acts through:

- monitoring calls of proposal made by European Commission and other international organization and setting up proposal with chemical companies, in particular SMEs.
- organizing training courses for managers and public officers
- identifying suitable financial resources at disposal of Chemical Companies' investments in R&D (risky funds such as venture capital) and energy efficiency (public support mechanism and grants).

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/en

Directory
Complete information about locations and products of Italian chemical companies.
www.federchimica.it/en/federchimica/repertorio-en

Data and analysis
Features and statistics, short term outlook and studies on Italian chemical industry.
www.federchimica.it/dati-e-analisi/conoscere-l'industria-chimica

ICE
The ICE-Italian Trade Promotion Agency is the government organisation which promotes the internationalisation of the Italian companies, in line with the strategies of the Ministry for Economic Development. ICE provides information, support and advice to Italian and foreign 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.
www.sviluppochimica.federchimica.it

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.com/en
info@investinitaly.com

FEDERCHIMICA

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

Associates

At present more than 1,400 companies, with a total of about 90.000 employees, are part of Federchimica. They are grouped into 17 Associations, articulated into 42 product groups. Federchimica is a member of Confindustria (General Confederation of the Italian Industry) and of Cefic (European Chemical Industry Council).

Targets

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

- to elaborate guidelines in economic, industrial and trade union topics and also 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 establishment of an accurate 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.

Management Departments

Federchimica's activity is managed by the General Management Department and four Central Departments:

- Industrial Relations,
- Internal Relations,
- Institutional Relations,
- Technical and Scientific Affairs.

Sector Associations

The activities of Sector Associations are implemented in close coordination with the Central Departments and hierarchically refer to the General Management Department.

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AISA
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ASCHIMFARMA
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ASSOBASE
National Association of Organic and Inorganic
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ASSOBIOTEC
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ASSOCASA
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ASSOGASLIQUIDI
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CERAMICOLOR
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COSMETICA ITALIA
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