

## OPENING OF LAMIERA: OVER 400 EXHIBITING COMPANIES FOR 40,000 SQUARE METRES OF TOTAL EXHIBITION AREA ITALY SECOND IN THE WORLD FOR PRODUCTION AND EXPORTS OF SHEET METAL FORMING MACHINES

*fieramilano Rho*, 6 May 2025. Today saw the opening of the twenty-third edition of **LAMIERA**, the international exhibition of sheet metal cutting, forming and processing machine tools and related technologies, **on stage at fieramilano Rho until Friday, 9 May**. Promoted by UCIMU-SISTEMI PER PRODURRE, the Italian machine tools, robots and automation systems manufacturers' association, LAMIERA is organised by CEU-CENTRO ESPOSIZIONI UCIMU.

The official opening took place with the Opening Ceremony this morning. The meeting, chaired by **Riccardo Rosa**, president of UCIMU-SISTEMI PER PRODURRE, included speeches by: **Raffaele Cattaneo**, undersecretary to the Presidency of the Lombardy Region; **Carlo Bonomi**, president of Fiera Milano. The meeting also hosted the presentation of the study carried out by CEU in cooperation with PwC, **"The metal forming machine sector: trends, challenges and opportunities"**, whose results were illustrated by **Sandro Bicocchi**, PwC partner, Studies and Institutional Relations Office, and by **Ivan Lavatelli**, PwC partner, Core Operation leader. A roundtable followed on "The point of view of customer sectors", moderated by **Fabrizio Garnero**, editorial director of TecnoLamiera, with **Andrea Bianchi**, head of Manufacturing Engineering - Transmissions & Mechanical Parts, Leonardo; **Fabio Giuliani**, chief operating officer, Mermec; **Riccardo Moretto**, Business Development manager, Moretto Group. The discussion highlighted the state-of-the-art and medium-term plans for some players from the most important destination sectors in the world of metal forming.

With **over 400 exhibiting companies** - including confirmations, important returns and interesting new entries - for **40,000 square metres** of total exhibition area occupied, **LAMIERA's area is sold out in its halls 13-15 completely set up for the event**. With regard to foreign exhibiting companies, **31% are from abroad**. **Twenty-three countries are represented** among the exhibitors: in addition to Italy, Austria, Belgium, Denmark, Finland, France, Germany, Japan, India, Israel, the Netherlands, Poland, Portugal, the United Kingdom, Czech Republic, People's Republic of China, Slovakia, Slovenia, Spain, the United States, Sweden, Switzerland, Turkey.

The comprehensive product offerings on show and the increased presence of international exhibitors will be elements of great appeal to visitors. The **networking among Italian exhibitors and visitors** is also fostered by the initiative promoted by the Association, in cooperation with MAECI-Ministry of Foreign Affairs and International Cooperation and ICE-Italian Trade Agency, which consists in inviting about thirty qualified end-users, selected within the target sectors of the technologies on show, representing Saudi Arabia, Brazil, China, India, Mexico, Serbia, Turkey, Hungary and Vietnam.

For this 23rd edition, the trade show has significant exhibitor attendance for all the sectors included in the repertoire. **Over 500 machines** will be **exhibited in operation**. In particular: sheet metal cutting and forming machines; bar, profile and tube processing machines; presses; welding systems; robotics; software; surface treatments and finishing and, for the first time, also a proposal of **Revamping & Retrofitting** technologies. After all, **LAMIERA 2025 is a sustainable event**, managed and organised according to the principles of environmental, economic and social sustainability, with ICIM ISO 20121:2024.

Beside the wide product offerings on display, LAMIERA combines the exhibition dimension with that of **thematic cultural insight**, thanks to a programme of meetings hosted within the arena of **LAMIALAMIERA** (Hall 13 A00), promoted by **UCIMU FOUNDATION**, with the contribution of the **Lombardy Region**, the sponsorship of **BPER Banca** and the patronage of **TecnoLamiera**.

A remarkable work has also been devoted to encouraging **dialogue between the world of the sector industry and that of education**, which translates into free and guided visits, dedicated to young students. These visits have been organised within **UCIMU Academy** (Hall 13 D00), which is ready to welcome students (over 900 accreditations), with the aim of introducing young people to the world of machine tools.

**Riccardo Rosa**, president of UCIMU-SISTEMI PER PRODURRE, said: "With these figures and this content, LAMIERA is confirmed as one of the most important exhibitions focused on the sector worldwide, a sector in which Italy excels, occupying the top positions in the world sector ranking, where, again in 2024, it ranked second for production and exports and third for consumption".

According to the **data processed by the Economic Studies Department & Business Culture Centre** of UCIMU-SISTEMI PER PRODURRE, despite the downturn recorded over 2023 (-14.5%), the Italian metal forming industry maintained its **second position** in the world ranking of **production in 2024**, with **2.9 billion euro**, after China and ahead of Germany. The same positioning was also highlighted in the **export** ranking. With **1.8 billion euro** (+1.1%) of sales overseas, the Italian

manufacturers of the sector strengthened their second place behind China and before Germany. With regard **to consumption**, with **1.3 billion euro**, despite a 32.7% drop, Italy kept its **third position** behind China and the United States, again ahead of Germany.

“The year 2024 was really difficult – added the president of UCIMU – but 2025 should be better. This is also confirmed by the index regarding the order intake for machine tools in the first quarter of the year, up by 8.5% compared to the same period last year. However, better does not mean brilliant. Indeed, - went on **Riccardo Rosa** – we are observing an interesting recovery in the domestic market, which regained momentum, also thanks to the clarification concerning the measure 5.0. Nevertheless, an increase of 71.5% in the domestic market is contrasted with a clear slowdown in exports (-18.2%), due to the general instability”.

“The recently obtained simplifications 5.0 have borne fruit and now Italian companies are making numerous requests even for large orders. The problem is that there is very little time to produce and deliver by the currently set deadline of 31 December 2025. Considering the dynamism of domestic demand, - added **Riccardo Rosa** – therefore, we think that the extension of the deadline of the measure by four months to April 2026, which is being discussed over the last weeks, is the appropriate and necessary decision to enable the Italian manufacturing industry to take advantage of the resources made available by the measure linked to the funds of the NRRP (National Recovery and Resilience Plan). We point out to the Government authorities that this is an opportunity that we absolutely must seize in all its potential, in order to ensure an improvement in the competitiveness of the Made in Italy offering compared to our foreign competitors”.

“On the other hand, the uncertainty of the context and the increasing complexity, in which companies are operating, prompted us to carry out the study **“The metal forming machine tool sector: trends, challenges and opportunities” together with PwC**”.

Conducted on a representative sample of companies in the metal forming segment, the study shows that in 2024, the geopolitical context negatively affected the business of about 70% of the enterprises in the sector, whereas in 2025, the share of companies that expects difficulties because of the context is down to 61%. At the same time, 10% of the total (versus 5% in 2024) states that instability might offer interesting competitive advantages, a sign that more and more enterprises are able to integrate the geopolitical factor into their company strategy by defining advanced tools for risk analysis, diversifying destination sectors, target markets and partners and investing in technological solutions to contain the effects of possible economic-political crises.

With reference to **destination sectors**, the survey highlights how the Italian metal forming industry allocates about half of its production to subcontractors (26%) and automotive (24%), followed by infrastructure, HVAC, household appliances, energy and defence. Recent developments and, in particular, however, the crisis in the automotive sector are driving manufacturers of metal forming machines to diversify their customer portfolios by strengthening their offerings for sectors expected to have **great potential** in the near future, such as **energy** and **defence**.

With regard to energy, the research indicates that 24% of the companies surveyed are (also) suppliers of energy players. Possible business developments concern supplies for renewable energy sources (solar and photovoltaic), for nuclear power and for energy distribution infrastructure. As regards the defence sector, which, at the moment, still absorbs a rather limited share of sheet metal forming machines, this is probably the area with the greatest potential for development, also owing to “Readiness 2030”, the plan with which Europe intends to finance the development of tools and means to guarantee the defence of the countries in the Union.

With regard to **export destination markets for the sector**, considering the current ‘super exposure’ of Italian manufacturers of metal forming machines towards **the USA and Germany**, which represent the first and second largest destination area for the Made in Italy products of the sector, companies are working to understand on which areas to focus in the near future. The United States is the first customer market for 43% of the respondents and the second one for a further 14%. Germany is the first purchasing country for 14% of the companies in the sample and the second one for 19% of them (second or third market for 33%). These data show the importance of the two partner countries, but they also force companies to think carefully about increasing their presence in new areas. Among these is certainly **Mexico** which, apart from the recent exploit, remains a rather uncertain market, in tension between the possible difficulties that may arise from the next decisions of the American administration on trade policies and the opportunities for the development of the local manufacturing industry, not only in response to the needs of domestic demand, but also to that expressed by the Central-South American area.

Finally, the study shows the importance of the issue of **technological innovation** and, in particular, of **digital technologies**, which, in this latest historical phase, translates into the application of **artificial intelligence** to the world of machines. Based on the CEU-PwC survey, 48% of the companies in the sample state that they are integrating or have recently started to integrate AI into their processes. In particular, 29% are starting to approach integration and 14% say they are at a partially advanced stage; only 5% confirm that they have a good level of implementation. In the latter case, usage mainly concerns: assisted simulation, design optimisation, assisted engineering and predictive analysis of performances. The remaining 52% justify the non-adoption of AI solutions by linking it to strategic and regulatory factors.

All these elements of change require a careful reflection on the subject of **training**. The survey highlights that, for 48% of the surveyed companies, the availability of qualified personnel ready to work in unusual business contexts and with disruptive technologies represents a critical element, which should become even more critical in the coming years, as 62% of the respondents stated, thus including a share of companies that do not currently experience any particular problems with the issue.

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