



National balance sheet and regional focus drawn up by the Marmomacc Observatory based on Istat data

EXPORTS DRIVE ITALIAN MARBLE: FIRST QUARTER 2013 - MARKETS GROWING IN USA, RUSSIA, MIDDLE EAST, NORTH AFRICA, MEXICO AND INDIA

Marmomacc - the world's leading natural stone industry exhibition scheduled next 25-28 September at VeronaFiere - confirms its role as the international trade hub for the industry. While waiting for an upturn at home, foreign markets continue to sustain the Italian stone sector that in the first three months of the year shipped processed and unhewn materials abroad worth almost 387 million euros - an increase of 9.2%. The CEO and Director General of Veronafiere, Giovanni Mantovani: *"For the 2013 edition of Marmomacc, in addition to United States, Canada and the United Kingdom, as important as ever as regards demand for products, target countries on which we will focus include Russia, China, South-East Asia and Central America. As regards machinery and technology, on the other hand, we will focus on Russia, North Africa, Iran, Iraq and Brazil."*

Verona, 27 June 2013 - The first quarter of 2013 saw continued positive export performances by processed Italian marble and granite products: markets were consolidated in the United States markets (+44.5%), Canada (+3%), Russia (+16%) and the Middle East (+8%), while Mexico (+50%), North Africa (+42.7%) and India (+45%) were up, while Europe lost a few positions (-4.9%). This is the scenario outlined on the basis of Istat data by the Marmomacc Observatory, the most important international event dedicated to natural stone, design and processing technologies scheduled at Veronafiere 25-28 September 2013 with its 48th edition (www.marmomacc.com).

Italian stone exports in the first three months of the year came to 386.8 million euros, with overall growth of 9.2% over the same period in 2012. The lion's share was taken by processed products, worth 307.4 million euros (+9.7%); there was also a "plus" sign for exports of rough blocks, up to 79.4 million euros (+7.2%).

These figures are in stark contrast to the generalised setbacks affecting many other areas of Italian exports since the start of the year; they reflect a field that is very successful abroad, thanks to the added value of excellent manufacturing and design, but still awaiting the recovery of the domestic market still blocked by the crisis in building and major works.

International development consequently confirms its vital role for the Italian stone industry that finds in **Marmomacc** its main trade hub.

"This is why," explained the CEO & Director General of Veronafiere, Giovanni Mantovani, "the 2013 edition of Marmomacc, alongside traditional markets in the United States, Canada and the United Kingdom, as important as ever as regards demand for products, target countries on which we will focus include Russia, China, South-East Asia and Central America. As regards machinery and technology, on the other hand, we will focus on Russia, North Africa, Iran, Iraq and Brazil."

The aim, therefore, is to select qualified buyers such as importers and distributors of machinery and products, construction and processing companies, purchase managers for materials used in large projects (contractor) who during the exhibition will follow up specific programmes of B2B meetings with exhibitors.

In the run-up to Marmomacc 2013, attendance has already been confirmed by **international delegations** from Angola, Australia, Belgium, Cameroon, Canada, China, Congo, France, Germany, Japan, Great Britain, India, Iran, Iraq, Mediterranean countries, Balkan Countries, Gulf countries, Portugal, Romania, Russia, Spain, United States, South Africa, South East Asia, South-Central America, Sweden and Switzerland.

There follow boxes with national and regional focuses on exports in the Italian natural stone sector.

National Focus 1st quarter 2013: export/import - finished and semi-finished products

Italian marble re-stated its international leadership, especially in finished and semi-finished product segments. There was a slight downturn on the main outlet market for this range of products: **Europe**, in fact, posted -4.9% for imports, with 124.1 million euros compared to 130.5 million in 2012.

In this case, the economic slow-down was caused by locomotive **Germany** putting on the brakes to fall back to 28.4 million euros (-13.4%). In the European context, exports remained stable only towards **France, the United Kingdom and Austria**.

In other reference areas, the American continent stood out: the **United States** imported materials worth 72.2 million euros (+44.5%), **Canada** for 11.7 millions (+3%) and **Mexico** for 2.4 millions (+50%).

The first quarter also saw growth for Italian companies in **Eastern Europe** and the **Balkans**, where exports came to more than 25 million euros (+6%): **Russia** stood out from other countries, with 9.6 million euros (+16.5%).

There was also an increase in exports to the **Middle East**, for a total of 45 million euros (+8%): whereas exports fell to **Saudi Arabia** (from 22.8 to 20.3 million euros), they increased to the **United Arab Emirates** to 9.5 million euros (+19%).

There are also good prospects in **North Africa** (Morocco, Tunisia, Algeria, Egypt and Libya), closing the quarter at 12 million euros (+42.7%), as well as in **India**, where orders came to more than 4 million euros (+45%).

As regards exports of unprocessed material, blocks of stone from Italian quarries continue to be popular, especially in the East, India and South-East Asia: in the first quarter, exports to **China** grew to 21.3 million euros (+28%); quantities were stable as regards **India** (16.5 million euros) and up by 45% for **Indonesia** (2.9 million euros).

Imports are a separate topic, coming to 88.3 million euros and posting over the first three months of 2013 an overall downturn between processed materials (-15%) and unprocessed materials (-8.2%) of 10.3%. **Brazil** continues to be the largest supplier of blocks to Italian companies, with imports from the South American country up by 20% to 13.8 million euros.

Regional Focus 1st quarter 2013: export - finished products and semi-finished products

Veneto. The Veneto Region, in the first three months of 2013, exported finished stone products worth 97 million euros compared to 90.4 million euros for the same period in 2012 (+7.2%). The region is headed by the natural stone districts in the province of Verona (+2.8% in the first quarter of 2013, for an export value of 76.8 million euros) and the province of Vicenza (+37.5%, for 14.5 million euros in exports). The reference markets once again are the United States and Germany.

Tuscany. Tuscany, through its stone districts in Massa-Carrara and Lucca, shares national leadership with the Veneto as regards in exports of marble, granite and agglomerates. Tuscan finished and semi-finished stone product exports, in the first three months of 2013, came to 105.7 million euros, compared to 90.8 millions for the same period in 2012 (+16.4%). Growth was achieved in the province of Massa-Carrara (+21.3% in the first quarter of the year, with exports worth 69.8 million euros) as well as Lucca (+8.4%, with exports totalling 29.7 million euros). Reference markets especially include the United States, Russia and the Middle East.

Lombardy. In the first quarter of 2013, exports of finished stone products from Lombardy came to 26 million euros, with a slight decrease compared to the same period in 2012 (-0.4%). There was growth in the province of Bergamo, to 8.9 million euros from 7.6 million euros in the previous year (+15.9%). Exports by companies in Brescia were also positive (+9.7%, for a total value of 4.8 million euros) but saw a downturn in Milan (-28.4%, to 4.2 million euros). Markets include the United States, the Middle East, India and China.

Sicily. Exports of marble and granite also improved in Sicily in the first three months of 2013, coming to a value of 22.6 million euros against 19.6 millions in the same period 2012 (+15.4%). The Trapani district continues to expand as the driving force for the sector in Sicily: companies based in Trapani exported finished stone products worth 13.3 million euros, compared to 10.8 millions in 2012 (+23.7%). Ragusa suffered a setback, from 5.9 million euros to 5.1 millions (-15.8%). Prominent markets include Saudi Arabia and the United Arab Emirates.

Trentino Alto Adige. Exports of stone materials held steady in Trentino Alto Adige: in the first quarter of 2013, the total value of finished goods came to 11.8 million euros, compared to 12.1 million euros in the previous year (-2.5%).

Specifically, Bolzano exported materials worth 4.8 million euros against 5.2 millions (-7.9%) and Trento for 7.0 millions (+1.5%). The reference markets for Trento and Bolzano alike are still Germany, Switzerland and France.

Friuli Venezia Giulia. Friuli Venezia Giulia, headed by the province of Udine, in the first three months of 2013 exported finished stone products worth 6.1 million euros against 5.8 millions in the same period of 2012 (+4.5%). Udine stands out, despite a downturn, with exports coming to 3.8 million euros against 3.9 millions (-4.5%).

Piedmont, Valle d'Aosta, Liguria. Piedmont and Valle d'Aosta, guided by the provinces of Verbano-Cusio-Ossola and Turin in the first three months of 2013 exported finished stone products worth 8.2 million euros against 7.1 millions for an increase of 14.9%. In particular, the province of Verbano-Cusio-Ossola, despite a setback, exported goods worth 3.3 million euros (-4.8%). Liguria in the first three months of 2013 exported processed materials worth 4.9 million euros compared to 3.6 millions in 2012 (+33.9%). Export also improved in La Spezia for a total of 2.6 million euros. Reference markets for this area of are Switzerland and France.

Emilia Romagna. Emilia Romagna, guided by the province of Modena, in the first three months of 2013 exported finished stone products worth 7.6 million euros over 6.1 million euros, an increase of 24.4% compared to 2012. In this region, the Modena area increased its exports: 4.2 million euros in the first quarter compared to 2.7 millions in the same period 2012 (+53.9%). Major markets for the area include France and the USA.

Latium. Growth in exports of finished stone products also for Latium in the first three months of 2013, coming to a total of 7.8 millions (+16.5%). Exports by Rome-based companies improved slightly to 5.7 million euros against 5.4 millions in 2012 (+5.3%). Major markets include the United States and the Middle East.

Apulia. Apulia saw a downturn in the first three months of 2013, exporting finished stone products worth 3.2 million euros against 4.9 millions (-35.3%). Companies from Foggia suffered a setback, with total exports coming to no more than 1.3 millions.

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