

ITALIAN WAY OF LIFE

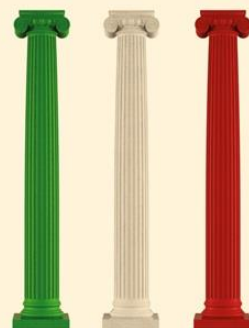
I nuovi ecosistemi che guidano la crescita

**Intervento di
MARCO FORTIS**

(Università Cattolica e Fondazione Edison)

The Innovation Group, Milano, Palazzo Reale, 11 maggio 2017

Marco Fortis
Editor



The Pillars of the Italian Economy

Manufacturing,
Food & Wine, Tourism

 Springer

Marco Fortis *Editor*

The Pillars of the Italian Economy

Manufacturing, Food & Wine, Tourism

This book offers a detailed analysis of the key sectors in the Italian economy, with the focus especially on areas in which the economy excels, such as the automatic packaging machinery sector, pharmaceutical production, the food and wine industry, and tourism. The book explains how, contrary to widespread opinion, Italy is one of the world's most competitive countries in foreign trade, as confirmed by a new index compiled by Fondazione Edison that highlights its strengths and top traded products. The main characteristics of the Italian productive system, which is primarily composed of SMEs, are documented, and a map illustrating the importance of the various industrial districts is proposed, identifying their sectors of specialization, historical roots, and development. The principal steps in Italy's industrialization over the past 150 years are then outlined, in particular for the manufacturing system – the main driver of Italian exports. In-depth analyses of the mechanical industry and the machinery sector follow. In combining meticulous analysis of statistical data with a historical perspective, this book will appeal to all with an interest in the Italian economy.

Business / Economics

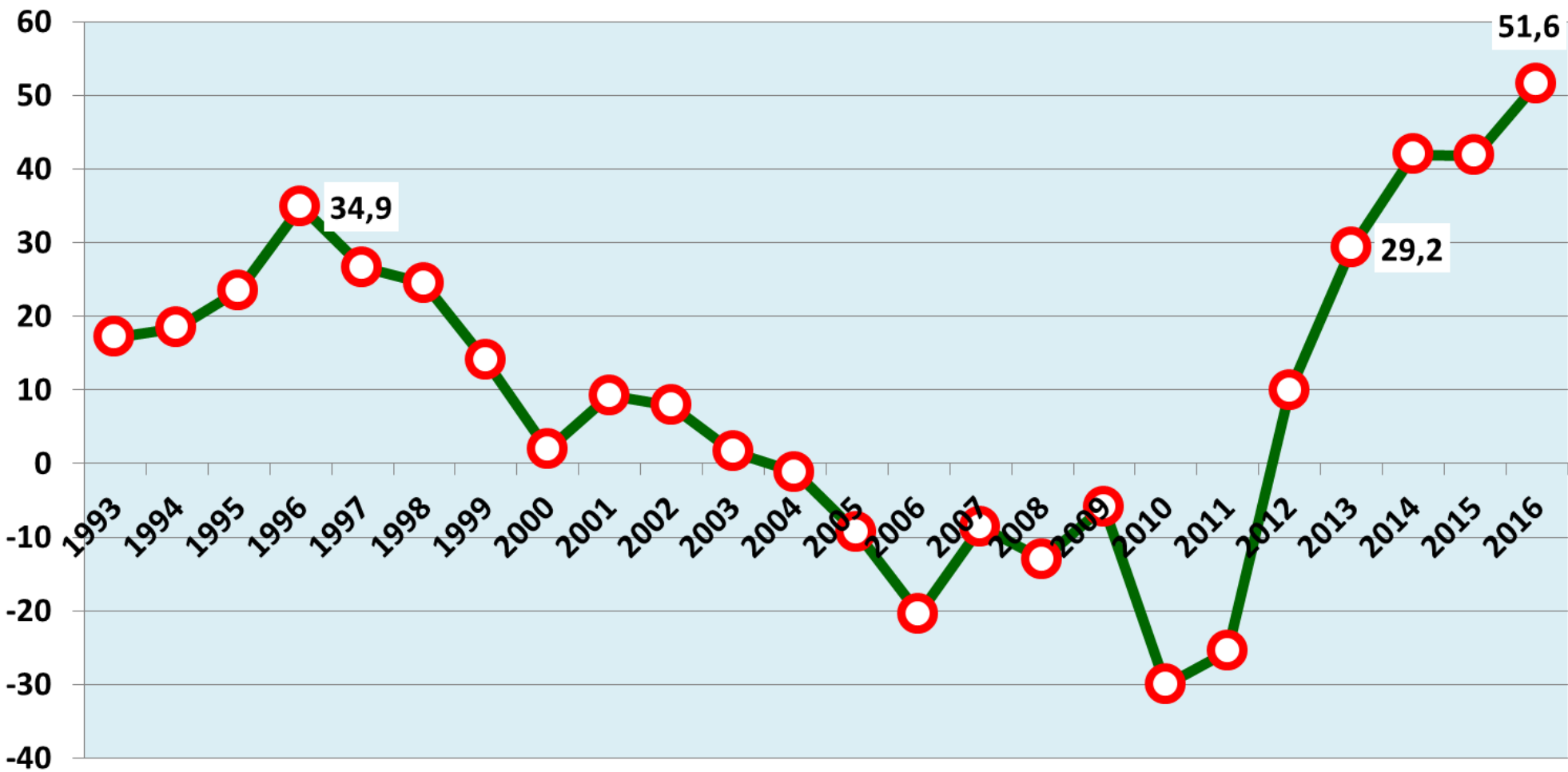
ISBN 978-3-319-40185-0



► springer.com

**LA BILANCIA COMMERCIALE ITALIANA HA RAGGIUNTO
NEL 2016 UN MASSIMO STORICO POSITIVO**
(dati in miliardi di euro)

Fonte: Istat



Position of G-6 Countries, China and South Korea in the ranking of competitiveness of the Trade Performance Index UNCTAD-WTO Year 2015

(ranking in each sector worldwide; in bold the placements among the top 10 most competitive countries)

Countries	GERMANY	ITALY	CHINA	REP. OF KOREA	JAPAN	FRANCE	UNITED KINGDOM	UNITED STATES
Sectors								
Fresh food	18	43	48	144	160	9	69	4
Processed food	1	5	10	83	114	2	39	30
Wood and paper	1	11	22	47	72	21	56	24
Textiles	3	1	2	6	20	17	24	34
Leather products	16	1	2	63	120	8	34	83
Clothing	17	1	2	71	109	15	31	91
Chemicals	1	16	17	7	6	2	19	8
Basic manufactures	1	2	3	4	5	14	15	43
Non-electronic machinery	1	2	4	7	10	8	12	18
Electronic components	1	2	12	20	4	7	22	24
IT & Consumer electronics	4	30	6	10	33	21	24	29
Transport equipment	1	3	2	4	16	7	22	32
Miscellaneous manufacturing	1	3	5	37	9	17	15	20
Minerals	58	96	126	100	130	47	18	12

Source: compiled by Fondazione Edison on data from International Trade Centre UNCTAD/WTO

KEY FIGURES OF «MADE IN ITALY» SECTORS ACCORDING TO THE TRADE PERFORMANCE INDEX UNCTAD/WTO: YEAR 2015

(Billion dollars)

Sectors	Position of Italy in the World Ranking of Trade Performance Index 2015	Value of Italy's Export 2015	Italy's Trade Balance 2015
CLOTHING	1	21.6	6.0
LEATHER PRODUCTS	1	21.6	10.3
TEXTILES	1	12.1	4.1
NON-ELECTRONIC MACHINERY	2	92.7	59.5
BASIC MANUFACTURES	2	52.5	12.2
ELECTRONIC COMPONENTS	2	21.1	3.1
TRANSPORT EQUIPMENT	3	45.6	5.4
MISCELLANEOUS MANUFACTURING	3	44.8	17.2
PROCESSED FOOD	5	29.7	5.1
TOTAL 9 BEST SECTORS		341.8	123.0

Source: compiled by Fondazione Edison on data from International Trade Centre UNCTAD/WTO.

FOREIGN TRADE BALANCE OF THE G-20 COUNTRIES: YEAR 2015

(billion dollars)

Countries	Total trade balance	Countries	Trade balance excluding energy	Countries	Trade balance excluding energy and vehicles
CHINA	600.2	CHINA	770.9	CHINA	777.9
GERMANY	274.9	GERMANY	345.3	GERMANY	204.2
RUSSIAN FEDERATION	156.2	SOUTH KOREA	160.6	SOUTH KOREA	106.6
SOUTH KOREA	90.3	JAPAN	116.0	ITALY	85.6
ITALY	49.8	ITALY	87.2	BRAZIL	34.8
SAUDI ARABIA	43.4	BRAZIL	30.9	ARGENTINA	4.4
INDONESIA	25.2	ARGENTINA	2.1	RUSSIAN FEDERATION	2.5
BRAZIL	19.7	SOUTH AFRICA	1.3	INDONESIA	1.8
JAPAN	-1.1	INDONESIA	1.2	JAPAN	1.1
ARGENTINA	-3.0	RUSSIAN FEDERATION	-9.8	SOUTH AFRICA	-0.8
SOUTH AFRICA	-4.2	MEXICO	-10.9	FRANCE	-12.6
CANADA	-11.7	FRANCE	-22.9	AUSTRALIA	-15.7
AUSTRALIA	-12.3	TURKEY	-33.3	TURKEY	-29.9
MEXICO	-14.5	AUSTRALIA	-38.1	CANADA	-52.9
TURKEY	-63.3	INDIA	-53.1	INDIA	-62.2
FRANCE	-66.6	CANADA	-59.6	MEXICO	-64.0

Source: compiled by Fondazione Edison on data from International Trade Centre

Bilancia commerciale dei manufatti non alimentari dei paesi dell'Eurozona e del Regno Unito: anno 2016
(dati in miliardi di euro)

Paesi	Meccanica e mezzi di trasporto		Altri manufatti non alimentari		Totale manufatti non alimentari
	Intra-UE	Extra-UE	Intra-UE	Extra-UE	Mondo
Germania	76.0	164.4	25.0	52.6	318.0
Italia	2.8	42.4	17.5	23.4	86.1
Irlanda	-10.7	1.8	24.0	31.5	46.6
Paesi Bassi	58.7	-46.9	58.1	-35.8	34.1
Belgio	2.4	-6.9	42.1	-10.9	26.7
Austria	-3.4	7.1	-5.1	5.5	4.1
Portogallo	-5.0	-0.2	-2.2	2.2	-5.2
Spagna	-6.8	4.3	-9.4	-2.7	-14.6
Grecia	-3.8	-3.3	-6.2	-2.3	-15.6
Francia	-33.7	19.5	-42.8	13.3	-43.6
Regno Unito	-57.6	-7.6	-37.4	-17.7	-120.3

Fonte: elaborazione Fondazione Edison su dati Eurostat

PRODUCTS IN WHICH ITALY HOLDS THE TOP SPOT IN THE WORLD FOR TRADE BALANCE

Index of competitive excellence of Italy in the world export market - Fortis-Corradini Index
(case study on a total sample of 5,117 products internationally traded)

Year 2015

1st
210 products
51 billion of \$



2nd
344 products
68 billion of \$



3rd
290 products
42 billion of \$



Total
844 products
161 billion of \$



"Collecting Medals" (Fortis-Corradini Index)

Top 10 products in which Italy holds the **first place** in the world by trade surplus year 2015



"Collecting Medals" (Fortis-Corradini Index)

Top 10 products in which Italy holds the **second place** in the world by trade surplus year 2015

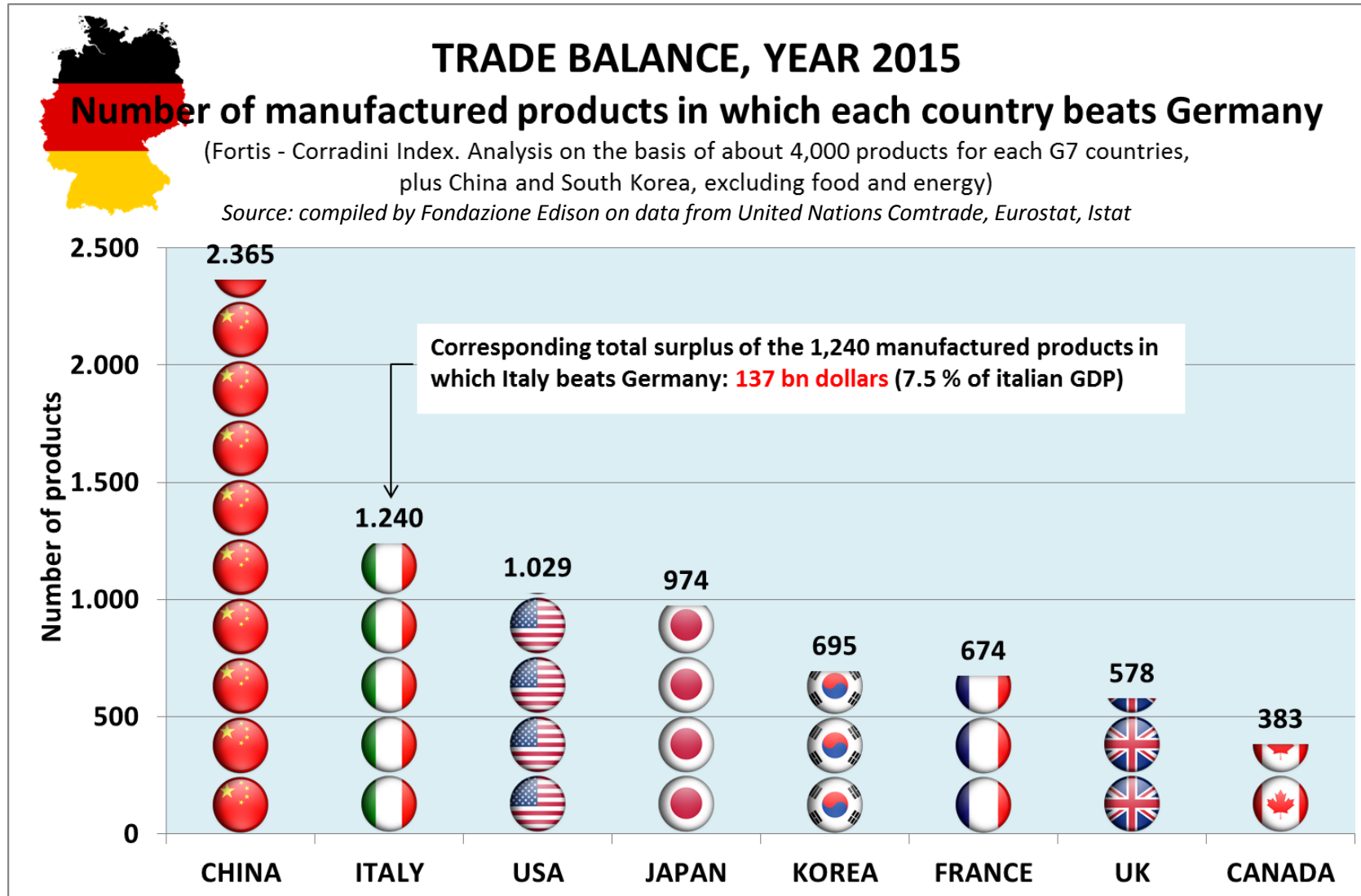


"Collecting Medals" (Fortis-Corradini Index)

Top 10 products in which Italy holds the **third place** in the world by trade surplus year 2015



Italy is the second country after China for the highest number of non-food manufactured products with a trade balance value higher than of Germany's (taken as a benchmark)



FOOD AND WINE PRODUCTS IN WHICH ITALY HOLDS THE TOP SPOT IN THE WORLD FOR TRADE BALANCE

Index of competitive excellence of Italy in the world export market - Fortis-Corradini Index
(case study of 616 agro-food products out of the 5117 total products that comprise international trade)
Year 2015



SETTORE MODA

NUMERO DI PRODOTTI IN CUI L'ITALIA SI TROVA AI VERTICI MONDIALI PER SALDO COMMERCIALE CON L'ESTERO

Indice delle eccellenze competitive nel commercio internazionale - Indice Fortis-Corradni
(casistica su un totale di 1.046 prodotti in cui è suddiviso il commercio internazionale)

Anno 2015

1^a 65 prodotti
14,8 Mld di \$



2^a 112 prodotti
8,7 Mld di \$



3^a 63 prodotti
8,1 Mld di \$



Totale
240 prodotti
31,6 Mld di \$



PRODUCTS IN WHICH ITALY HOLDS THE TOP SPOTS IN THE WORLD TRADE BALANCE IN THE MACHINERY, MECHANICAL APPLIANCES AND METAL PRODUCTS INDUSTRY

Index of Italy's competitive excellence in world trade - Fortis-Corradini Index
(case study of 633 mechanical products out of the 5117 total products that comprise international trade)
Year 2015



SETTORE ARREDO CASA

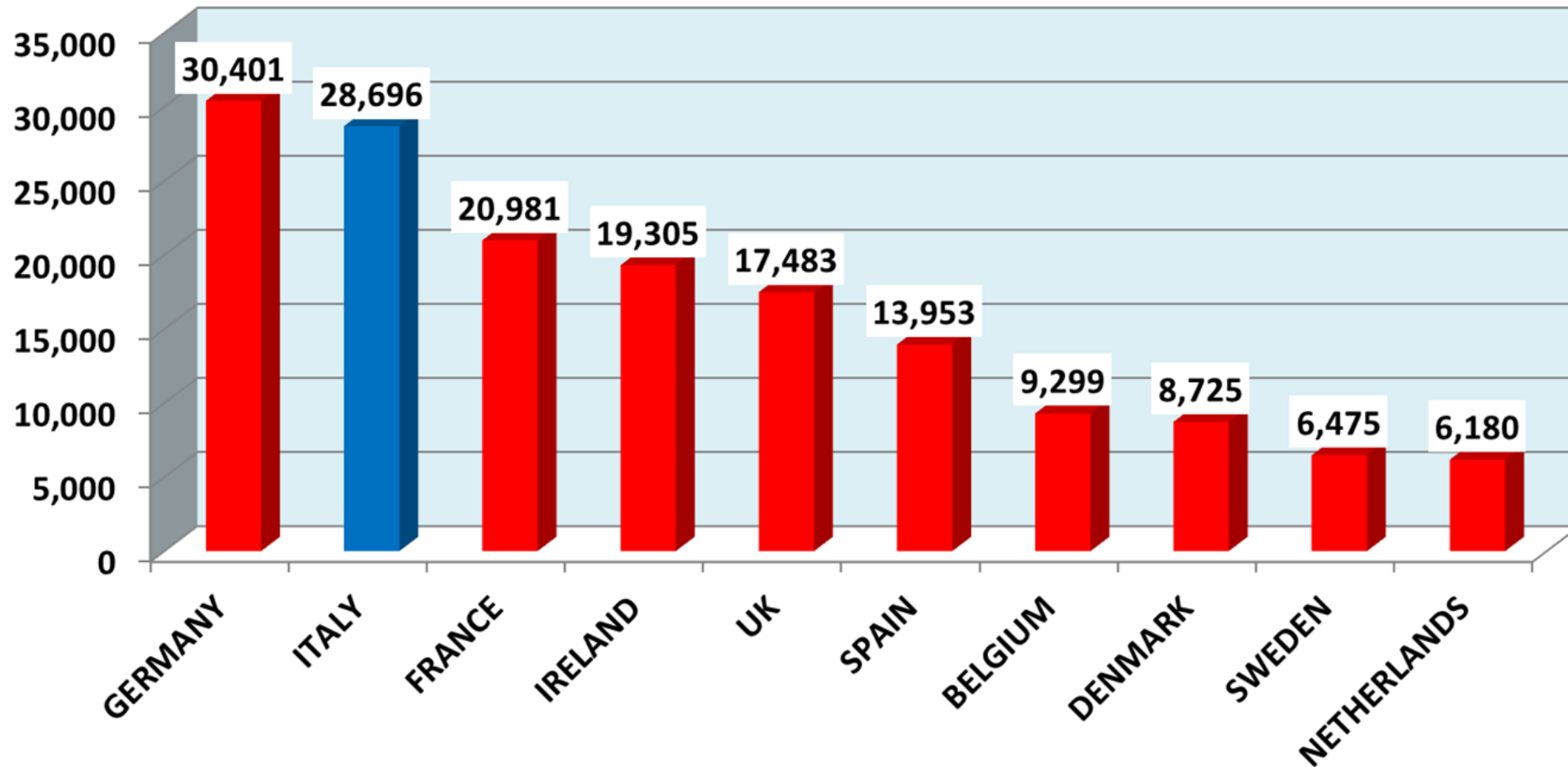
NUMERO DI PRODOTTI IN CUI L'ITALIA SI TROVA AI VERTICI MONDIALI PER SALDO COMMERCIALE CON L'ESTERO

Indice delle eccellenze competitive nel commercio internazionale - Indice Fortis-Corradni
(casistica su un totale di 295 prodotti in cui è suddiviso il commercio internazionale)
Anno 2015



PHARMACEUTICAL PRODUCTION IN THE EU: TOP 10 COUNTRIES, YEAR 2014 (€ million)

Source: European Federation of Pharmaceutical Industries and Associations



CRESCITA DELLA PRODUZIONE MANIFATTURIERA IN ITALIA E GERMANIA NEL BIENNIO 2015-2016

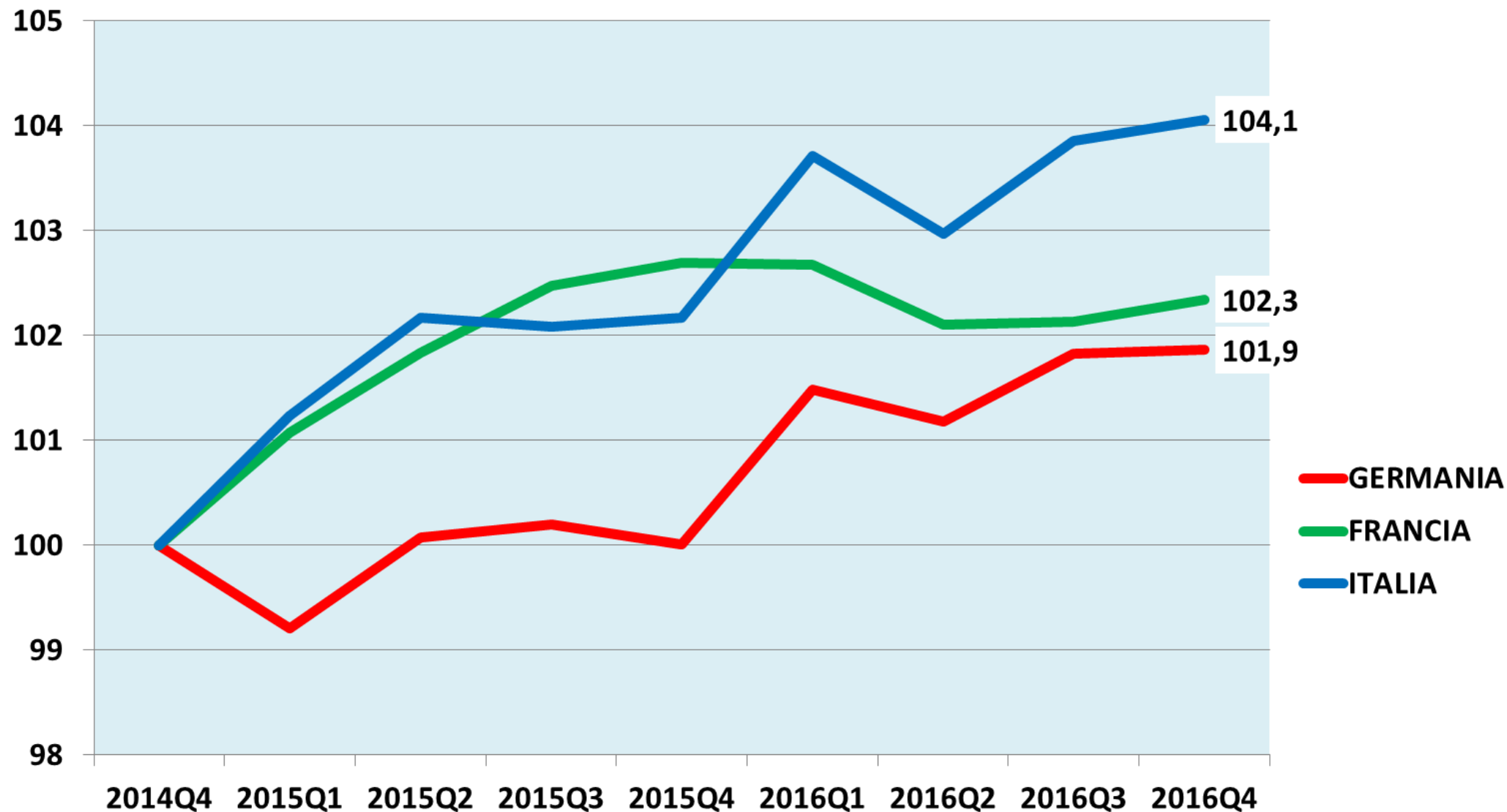
(indici di produzione industriale corretti per il calendario; dati medi annui;
variazioni % cumulate rispetto al 2014)

	ITALIA	GERMANIA
Produzione manifatturiera - Totale	3	1,8
<i>di cui: industrie alimentari, bevande, tabacco</i>	<i>1,1</i>	<i>-0,4</i>
<i>chimica</i>	<i>2,3</i>	<i>-1,2</i>
<i>farmaceutica</i>	<i>7,9</i>	<i>6,2</i>
<i>macchine e apparecchi</i>	<i>3,8</i>	<i>-0,1</i>
<i>mezzi di trasporto</i>	<i>22,7</i>	<i>3,3</i>

Fonti: Eurostat e Istat

VALORE AGGIUNTO MANIFATTURIERO DEI 3 MAGGIORI PAESI DELL'UEM (dati destagionalizzati, indici 3° trimestre 2014=100)

Fonte: elaborazione su dati Eurostat



Crescita del valore aggiunto dei settori dell'economia italiana: 2013-2016

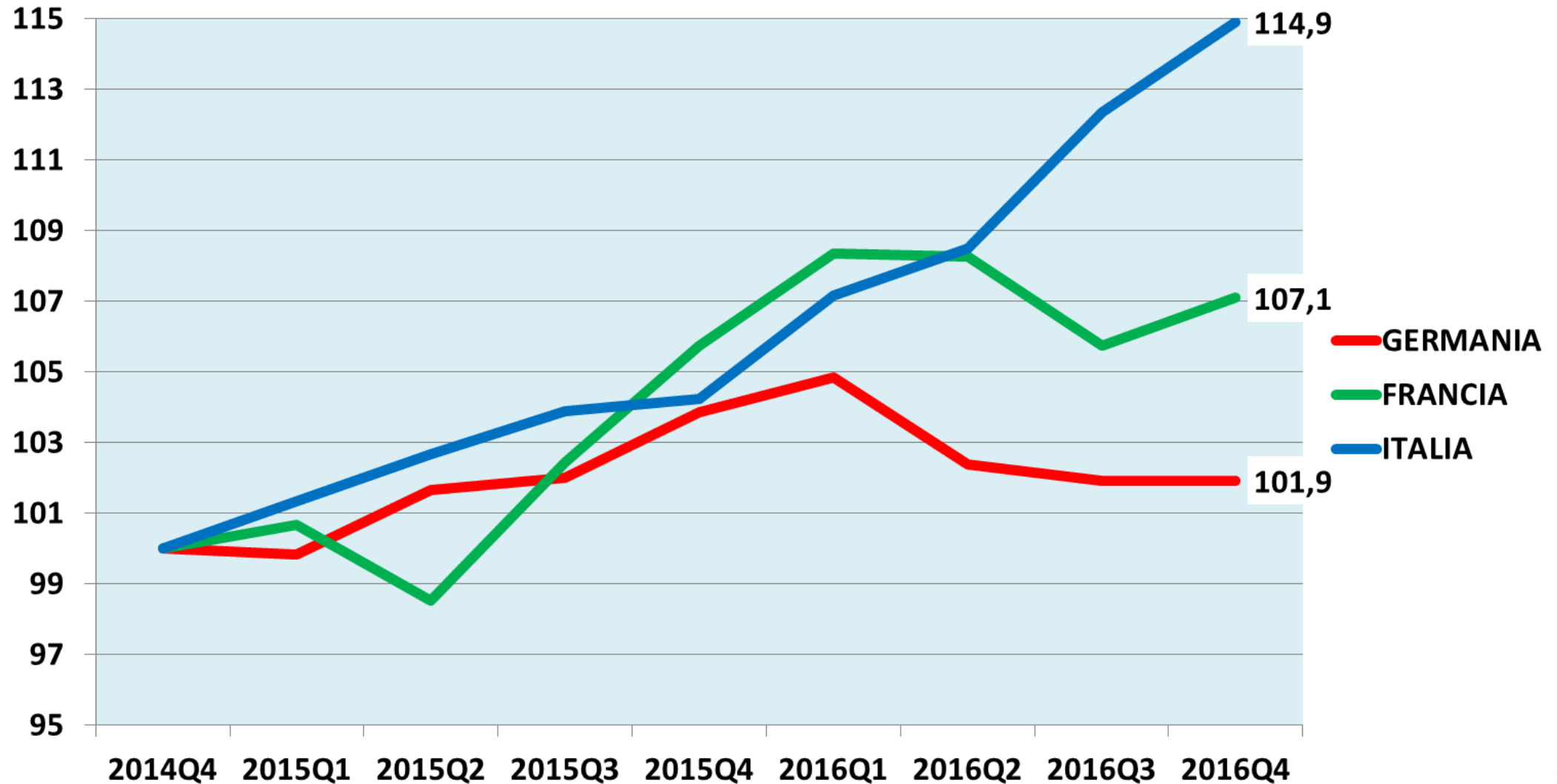
(valori concatenati, anno 2010, miliardi di euro e variazioni % cumulate)

		2013	2016	var %
	TOTALE ATTIVITA' ECONOMICHE	1,395.0	1,417.1	1.6%
A	Made in Italy	782.5	813.8	4.0%
a1	agricoltura e pesca	28.6	29.0	1.3%
a2	industria manifatturiera	221.3	230.4	4.1%
a3	commercio	158.1	169.2	7.0%
a4	alloggio e ristorazione	49.7	53.1	6.8%
a5	attività e proprietà immobiliari	189.9	193.8	2.1%
a6	attività legali, contabili, ingegneria e architettura	62.3	63.5	2.1%
a7	pubblicità e altre attività professionali	16.6	17.2	3.3%
a8	noleggi, leasing, ricerca di personale, viaggi	40.8	42.2	3.6%
a9	attività artistiche e di intrattenimento	15.2	15.4	1.1%
B	Sistema Italia	612.9	604.0	-1.4%
b1	industria estrattiva	6.2	6.7	7.5%
b2	energia elettrica e gas	23.0	22.6	-1.7%
b3	acqua e rifiuti	10.3	10.0	-2.3%
b3	trasporti e magazzinaggio	72.2	70.3	-2.7%
b5	costruzioni	68.0	63.5	-6.6%
b5	informazione e comunicazione	59.3	57.9	-2.3%
b7	banche e assicurazioni	76.6	75.8	-1.0%
b8	ricerca scientifica	8.9	8.9	-0.7%
b9	amministrazioni pubbliche	100.2	98.7	-1.5%
b10	istruzione	62.9	63.5	1.0%
b11	sanità e assistenza sociale	84.8	86.0	1.4%
b12	altre attività di servizi e di famiglie	40.5	40.1	-1.0%

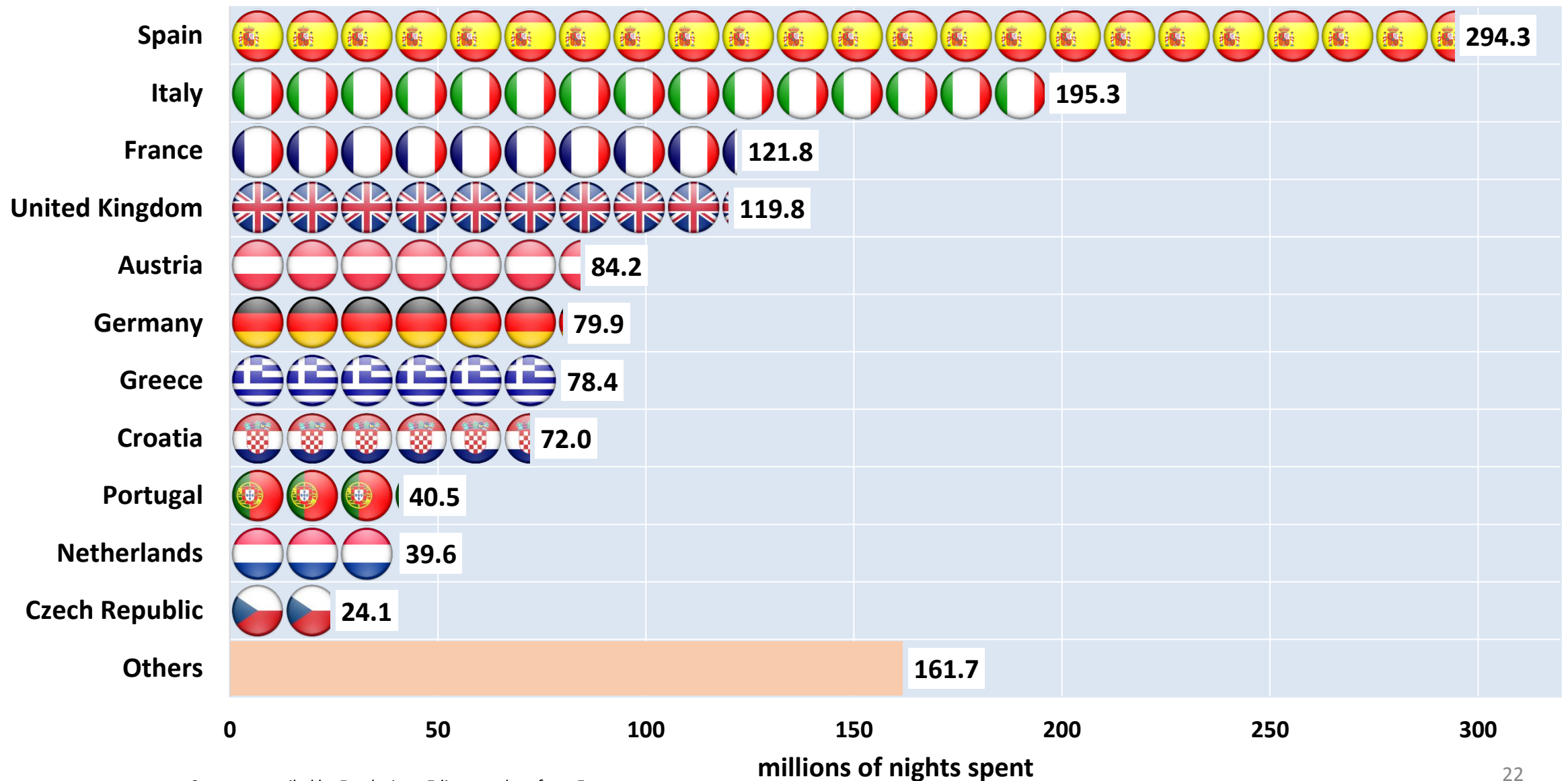
Fonte: elaborazione Fondazione Edison su dati Istat

**INVESTIMENTI IN MACCHINARI E MEZZI DI TRASPORTO
DEI 3 MAGGIORI PAESI DELL'UEM
(dati destagionalizzati, indici 3° trimestre 2014=100)**

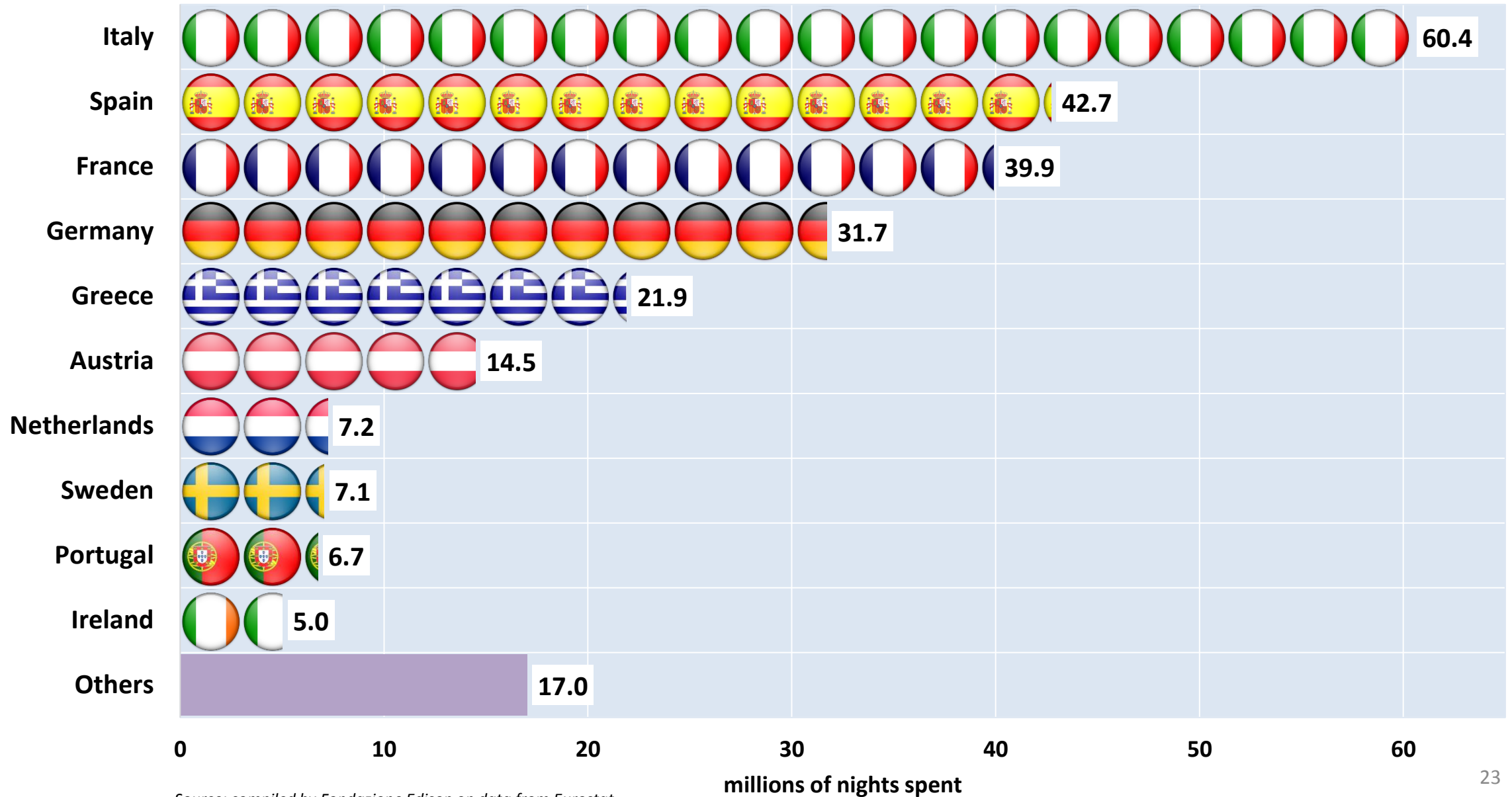
Fonte: elaborazione su dati Eurostat



Ranking of EU-28 countries for number of nights spent by non resident (year 2016)



Ranking of Eurozone Member States for number of nights spent by extra-EU tourists (year 2015)



Italian regions e provinces in the rank of Eurozone countries: total nights spent by non-residents (2015)

	Territory	Nights (bn)
1	SPAIN	269.4
2	ITALY	192.6
3	FRANCE	130.5
4	AUSTRIA	80.3
5	GERMANY	78.8
6	GREECE	78.3
7	Veneto	42.2
8	PORTUGAL	38.9
9	NETHERLANDS	37.3
10	Trentino Alto Adige	26.8
11	Venice	24.8
12	Tuscany	23.9
13	Lombardy	21.7
14	Bolzano	20.1
15	Lazio	19.7

	Territory	Nights (bn)
16	Rome	18.9
17	BELGIUM	18.9
18	IRELAND	13.5
19	CYPRUS	12.6
20	Verona	11.7
21	Florence	10.0
22	Emilia-Romagna	9.6
23	Milan	8.8
24	Campania	8.7
25	MALTA	8.5
26	Sicily	7.0
27	Trento	6.7
28	SLOVENIA	6.5
29	Naples	6.5
30	Brescia	6.4

Source: compiled by Fondazione Edison using data from Eurostat and Istat