INTERLIFT 2015

THE GREAT BEAUTY: THE ITALIAN LIFT INDUSTRY

Fabio Liberali

Elevatori – The European Elevator Magazine

Italia

ITALY THE EXTRAORDINARY COMMONPLACE

WOW, ITALY IS SO BEAUTIFUL!!! (Mark Zuckerberg)

LIFTS

A DEEP ROOTED ITALIAN TRADITION

70 AD

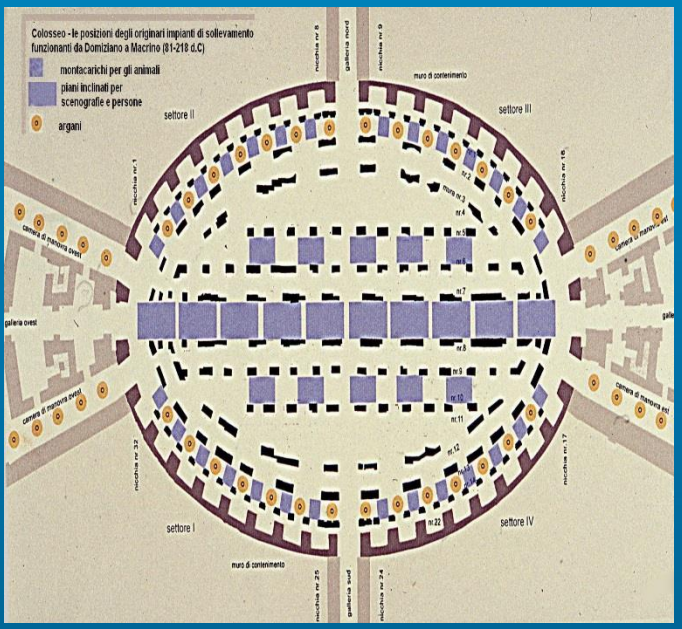
elevatori
THE EUROPEAN ELEVATOR MAGAZINE

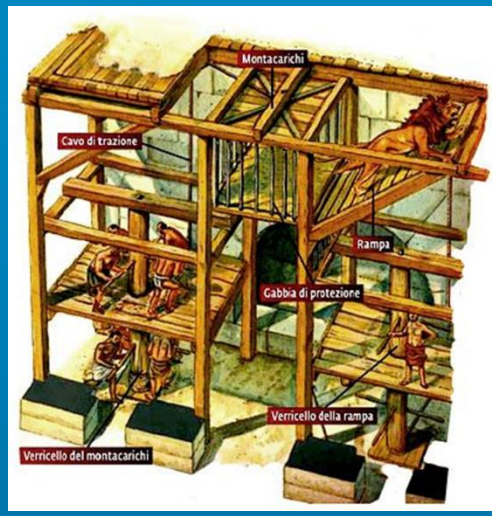
Leading technical magazine in Europe

Fabio Liberali
Editorial manager of Elevatori
www.elevatori.it

COLOSSEUM

Installed - some 2,000 years ago





Passenger/goods lifts: 28

Travel: 8 m

Traction system - 8 men on 2 levels

Rated load – 300 kg

Lead Counterweight – 120 kg

Occupancy: 50/75,000

Speed – Unknown

HOISTWAY

TRACTION

8 men for the lift

plus

3 men to open the trapdoor

HOISTGEAR

WINCH HOUSING

4,10 m tall wooden mast

Italy has the largest number of installed lifts in the world

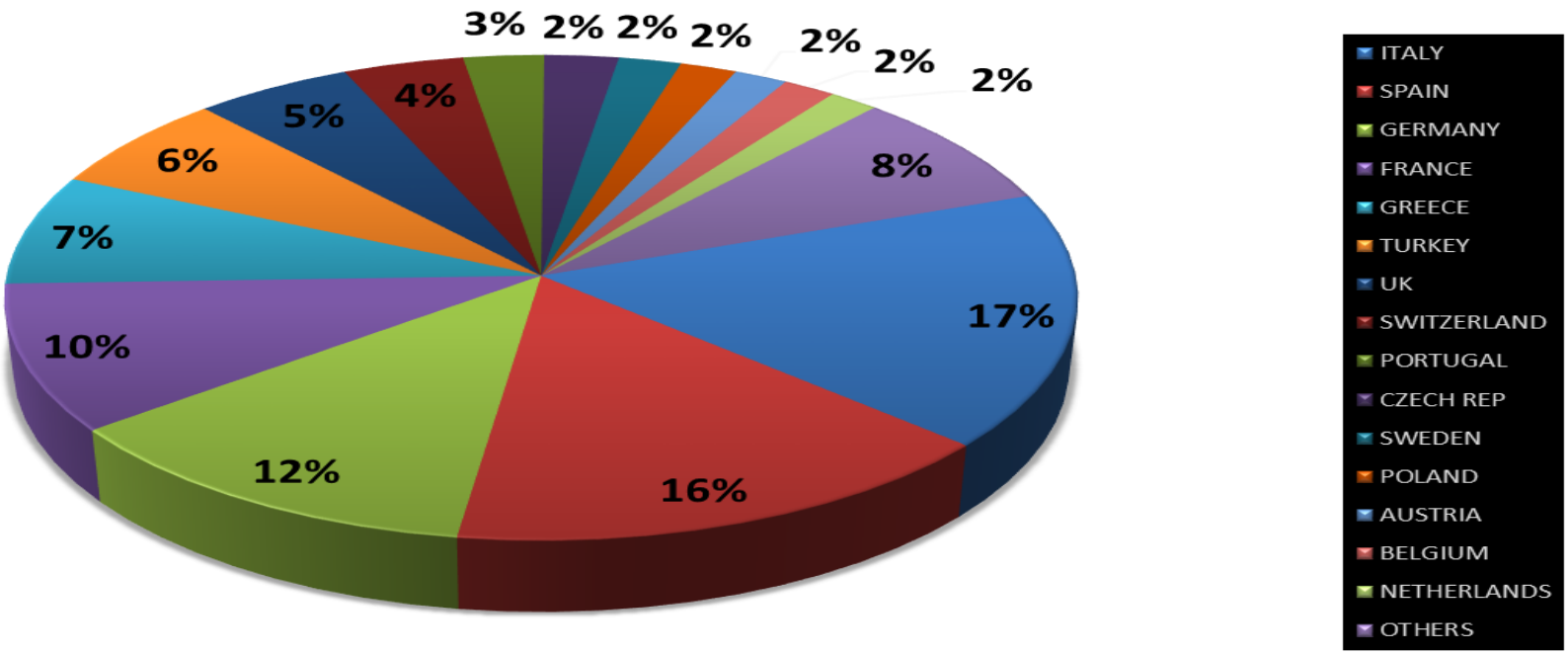
(apart from China)

CHINA ~ 3 million

ITALY

~ 1 million

Italy has the largest number of installed lifts in Europe: some 17% of total



HISTORICAL TURNOVER EVOLUTION

1997/2006

Lift industry aggregate turnover in constant growth:

average + 5,2%

Production + post sales service:

+66%

Total turnover (2006):

over €2,4 billion,

32% from export

NEW INSTALLATIONS

+7,8% average increase in period

1997/2006 - Average 20,000 new installations per year

THE ITALIAN LIFT MARKET - 2014

some 1,000,000 lifts in service

some 10,000 escalators & mw in service

NEW

- about 8/9,000 LIFTS
- about 4,000 home lifts
- about 6/8,000 stairlifts
- about 350 E+MW

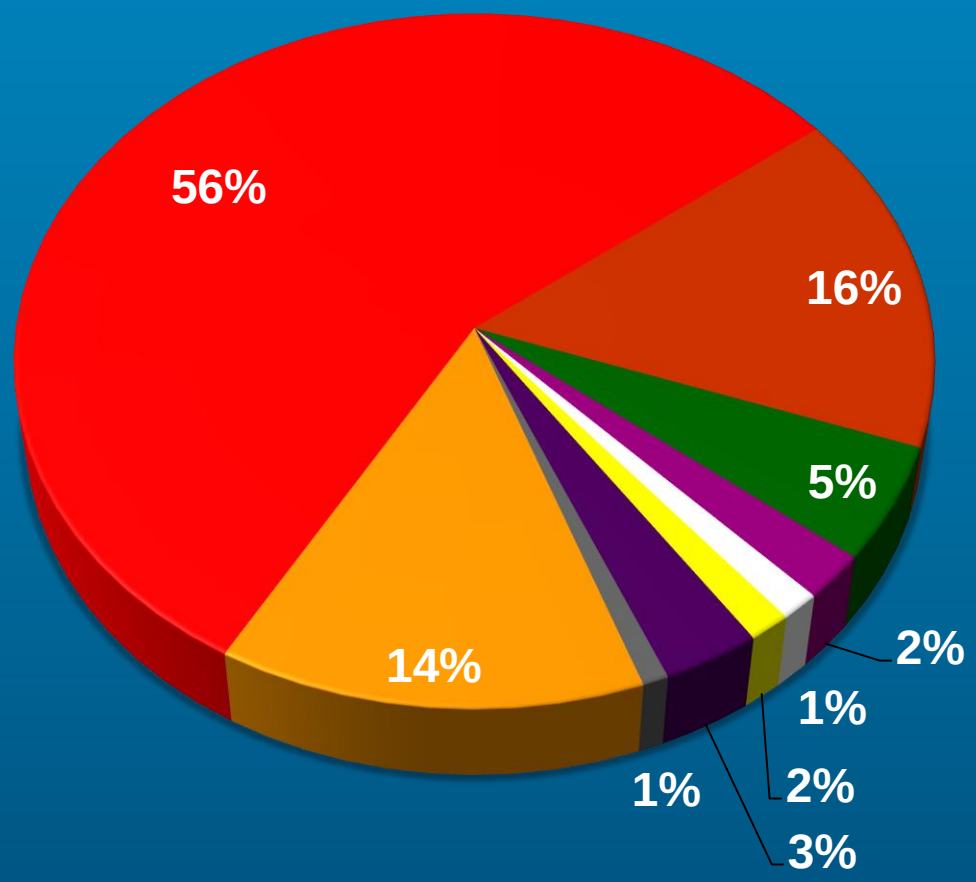
Mod market (2013)

+4%

TOTAL TURNOVER: some €2,2 billion

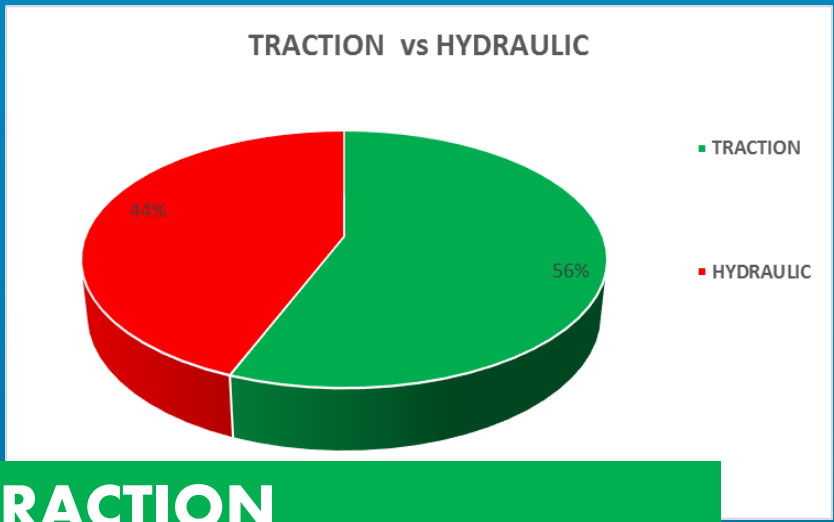
(more than 40% from EXPORT)

THE ITALIAN LIFT MARKET – by application field



- RESIDENTIAL BUILDINGS
- VARIOUS PUBLIC OFFICES, SCHOOLS & MUNICIPALITIES
- OFFICES AND PRIVATE BUILDINGS
- INDUSTRIAL PREMISES
- BANKS AND POST OFFICES
- DEPT.STORES & SUPERMARKETS
- HOTELS
- HOSPITALS
- TRANSPORTS (AIRPORTS, STATIONS & SUBWAYS)

TRACTION vs HYDRAULIC



HYDRAULIC

Large diffusion in '80/'90s

- **some 80% of new**

Easier installation & maintenance

Easier to be installed in historical buildings

TRACTION

Large diffusion in '60/'70s

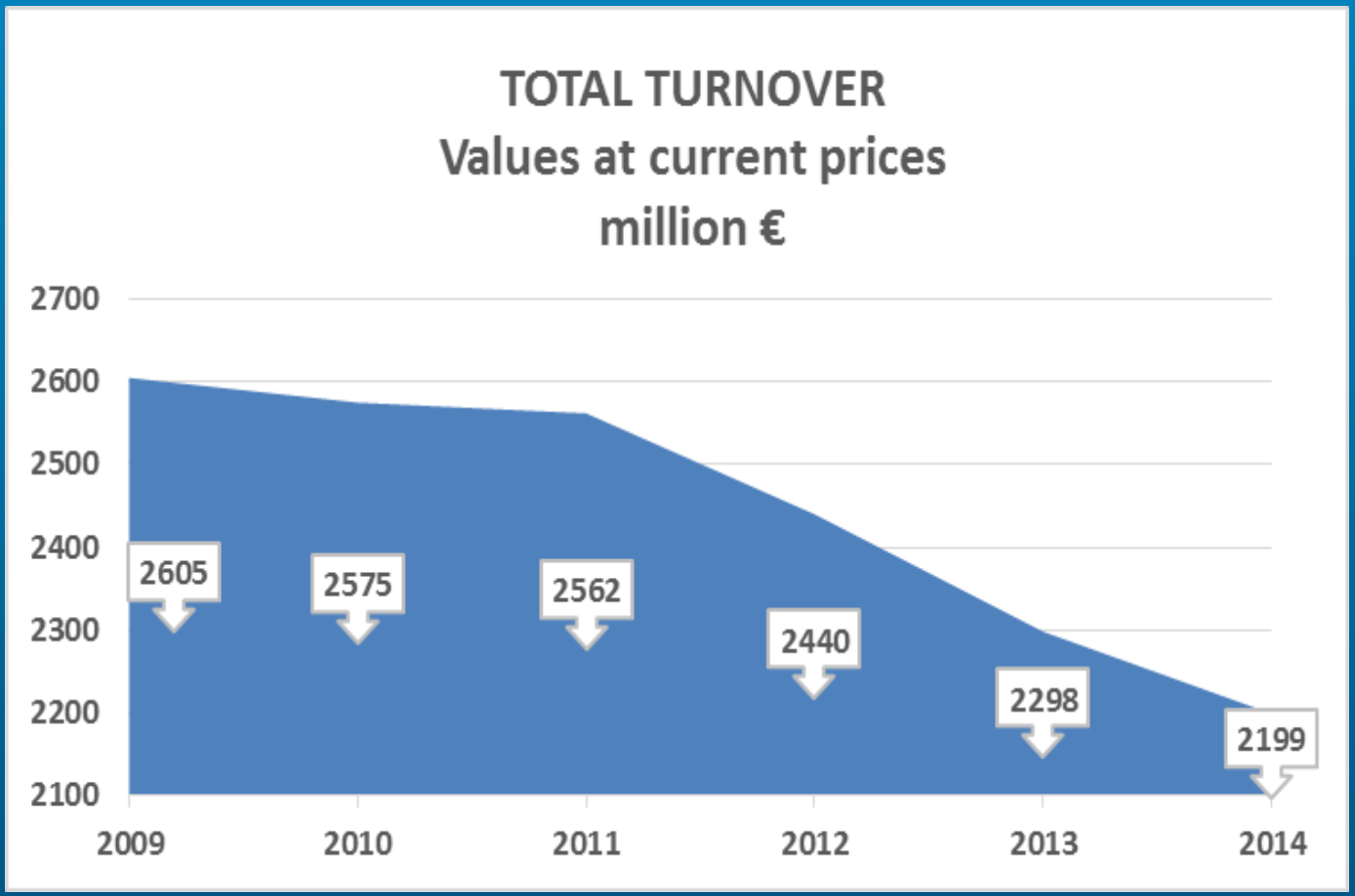
- **over 350,000**

MRL boosted market in late '90s

Lower power / Lower Consuption

THE ITALIAN LIFT & ESCALATOR MARKET TRENDS

2009 – 2014



- 2013/2012

-6,2%

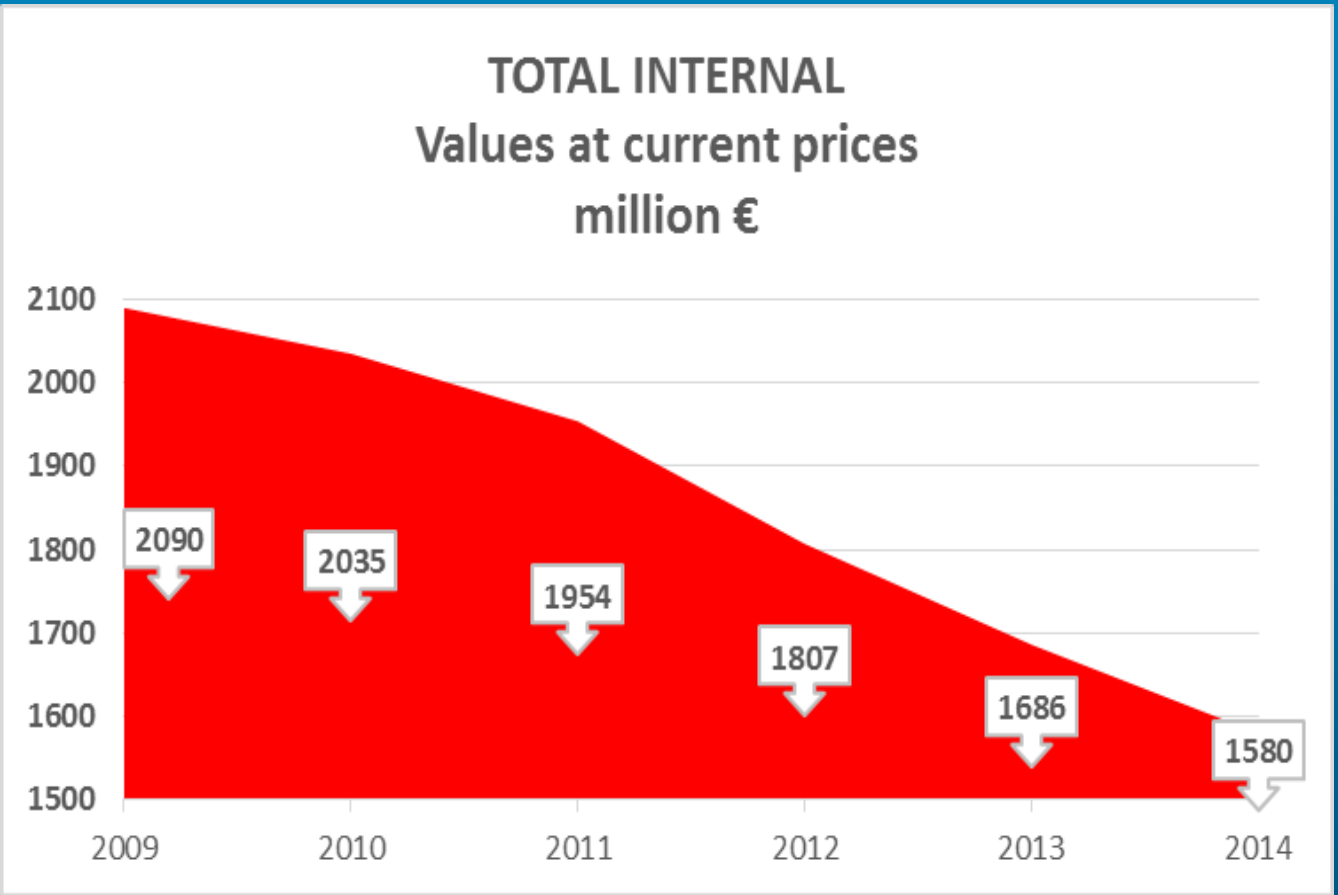
- 2014/2013

-4,3%

(Source AssoAscensori – Report)

THE ITALIAN LIFT & ESCALATOR MARKET TRENDS

2009 – 2014



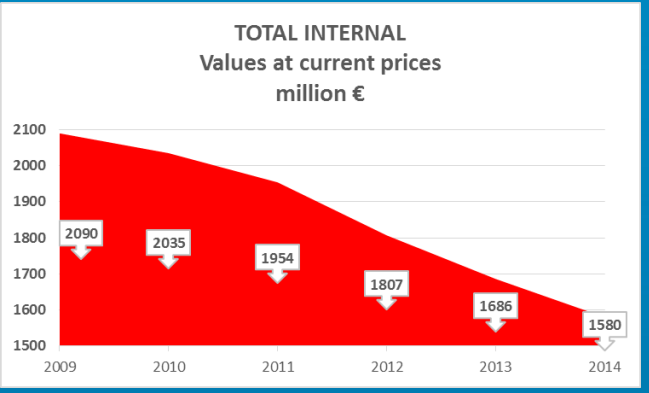
- **2013/2012**

-6,7%

- **2014/2013**

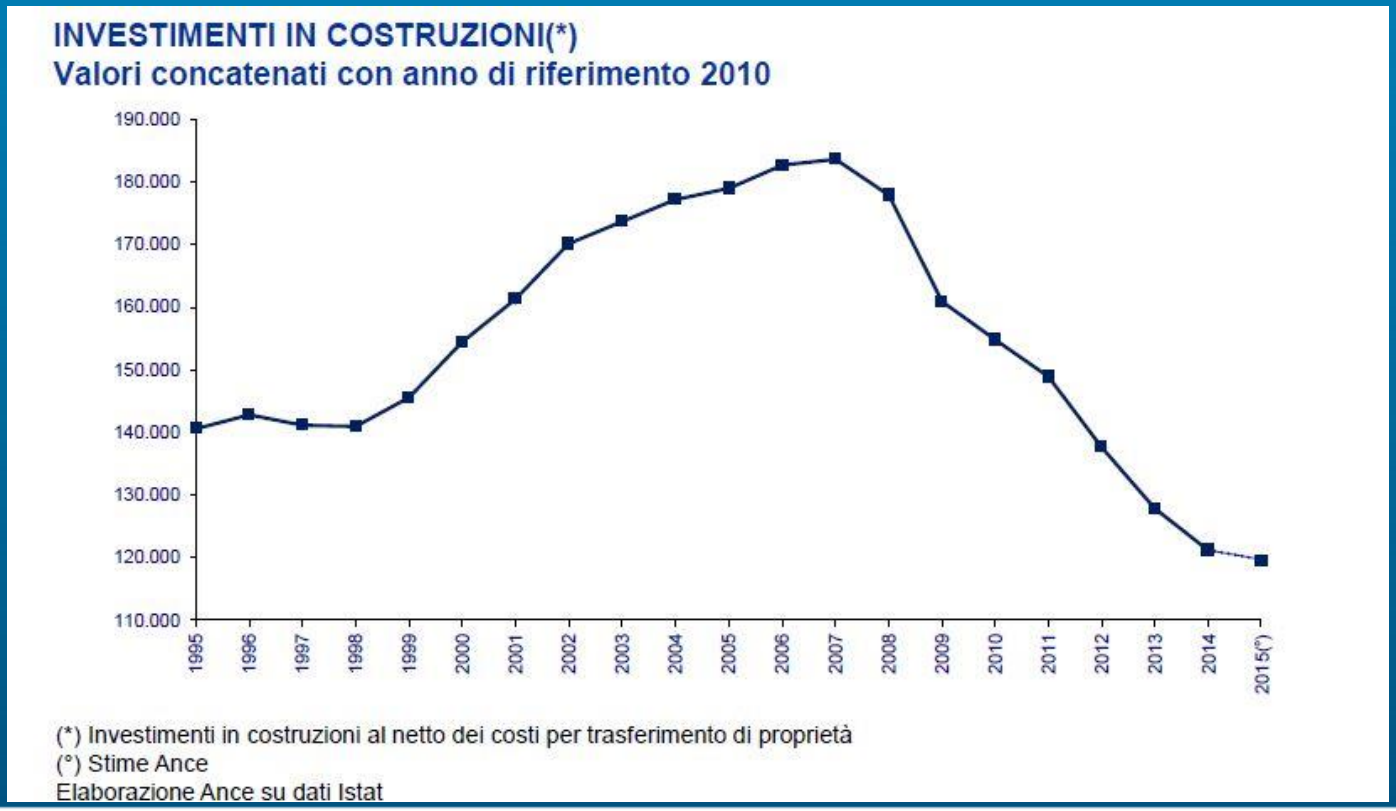
-6,3%

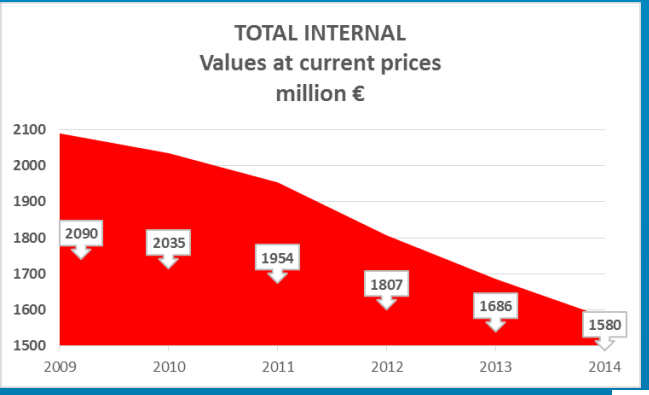
(Source AssoAscensori – Report)



THE ITALIAN LIFT & ESCALATOR MARKET TRENDS

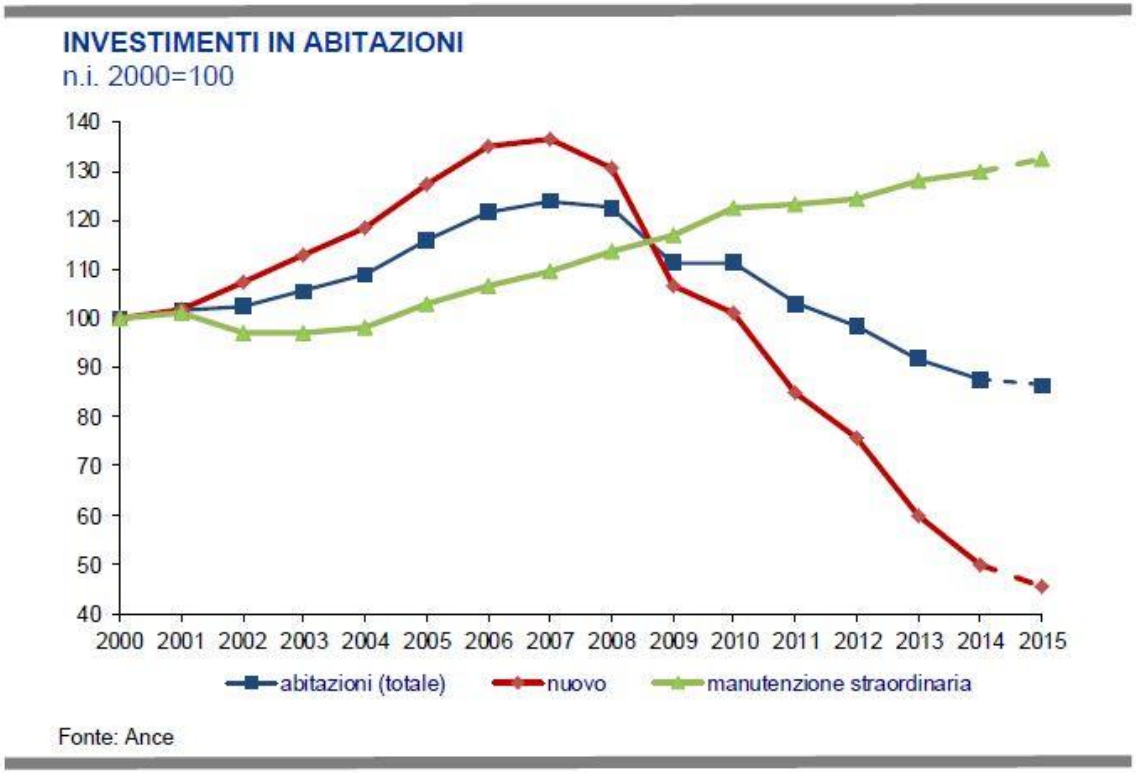
2009 – 2014





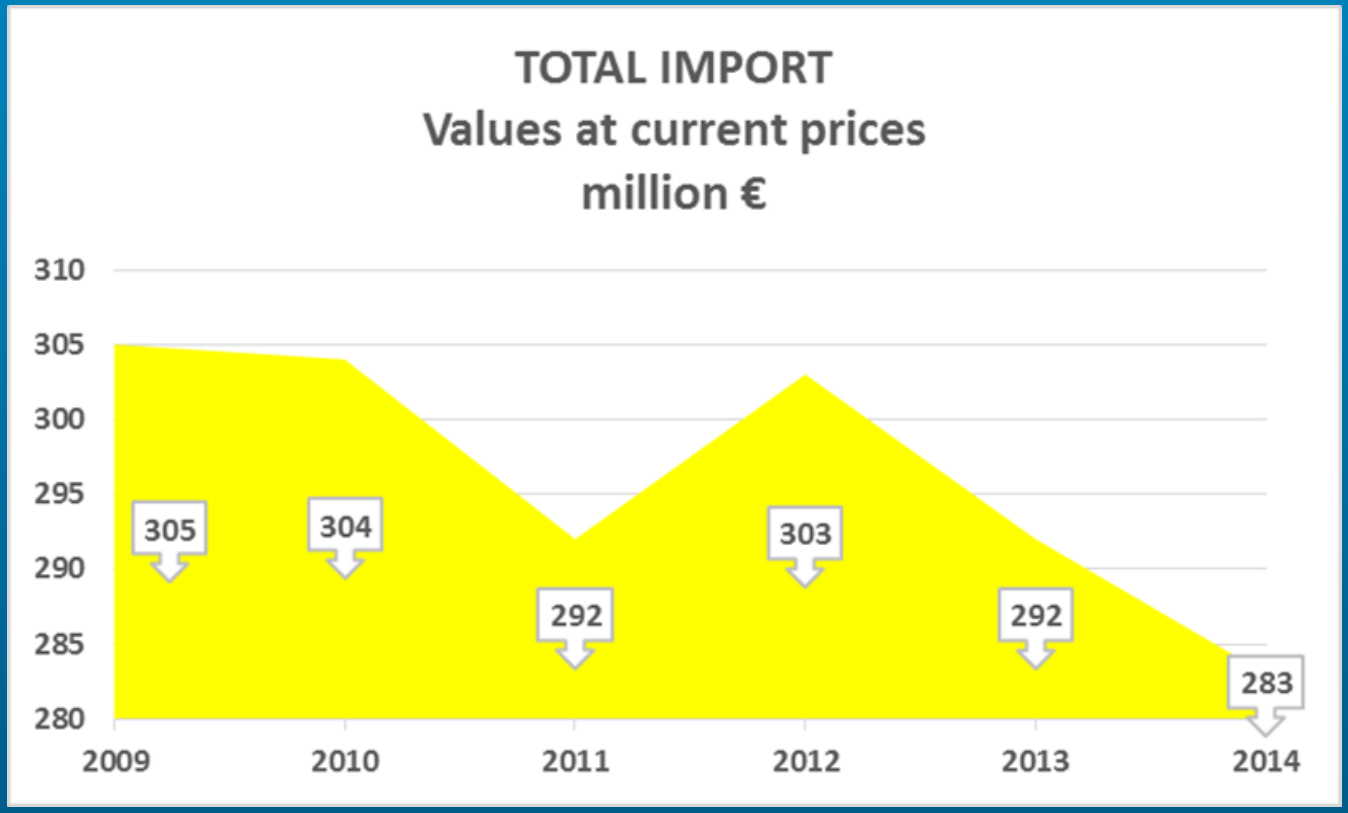
THE ITALIAN LIFT & ESCALATOR MARKET TRENDS

2009 – 2014



THE ITALIAN LIFT & ESCALATOR MARKET TRENDS

2009 – 2014



- 2013/2012

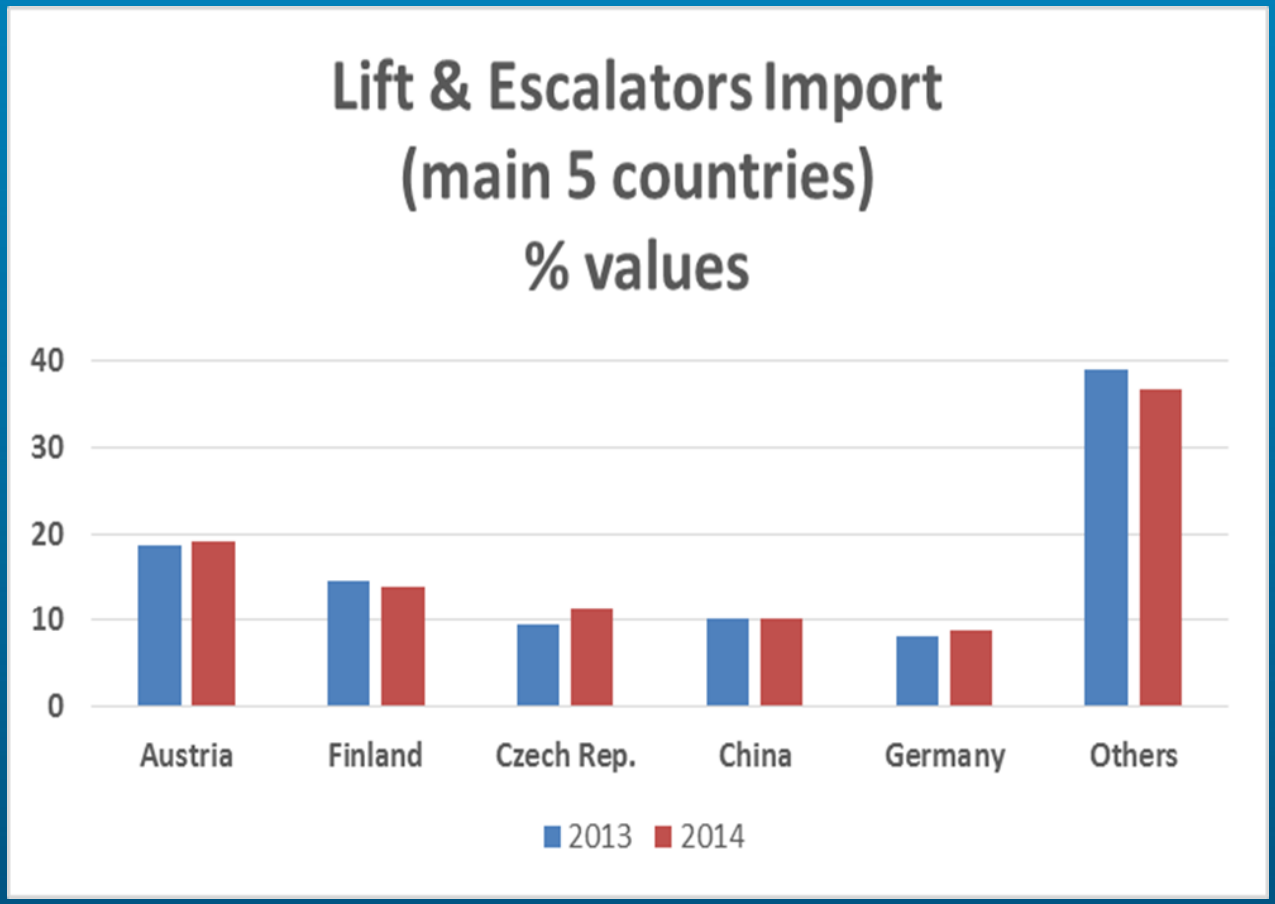
-3.6%

- 2014/2013

-3.2%

(Source AssoAscensori – Report)

LIFT & ESCALATOR IMPORT by country



In 2014

- EU 80.5%
- Asia 10.4%
- (China 10,2%)

(Source AssoAscensori – Report)

THE ITALIAN LIFT & ESCALATOR MARKET TRENDS

2009 – 2014

- 2013/2012

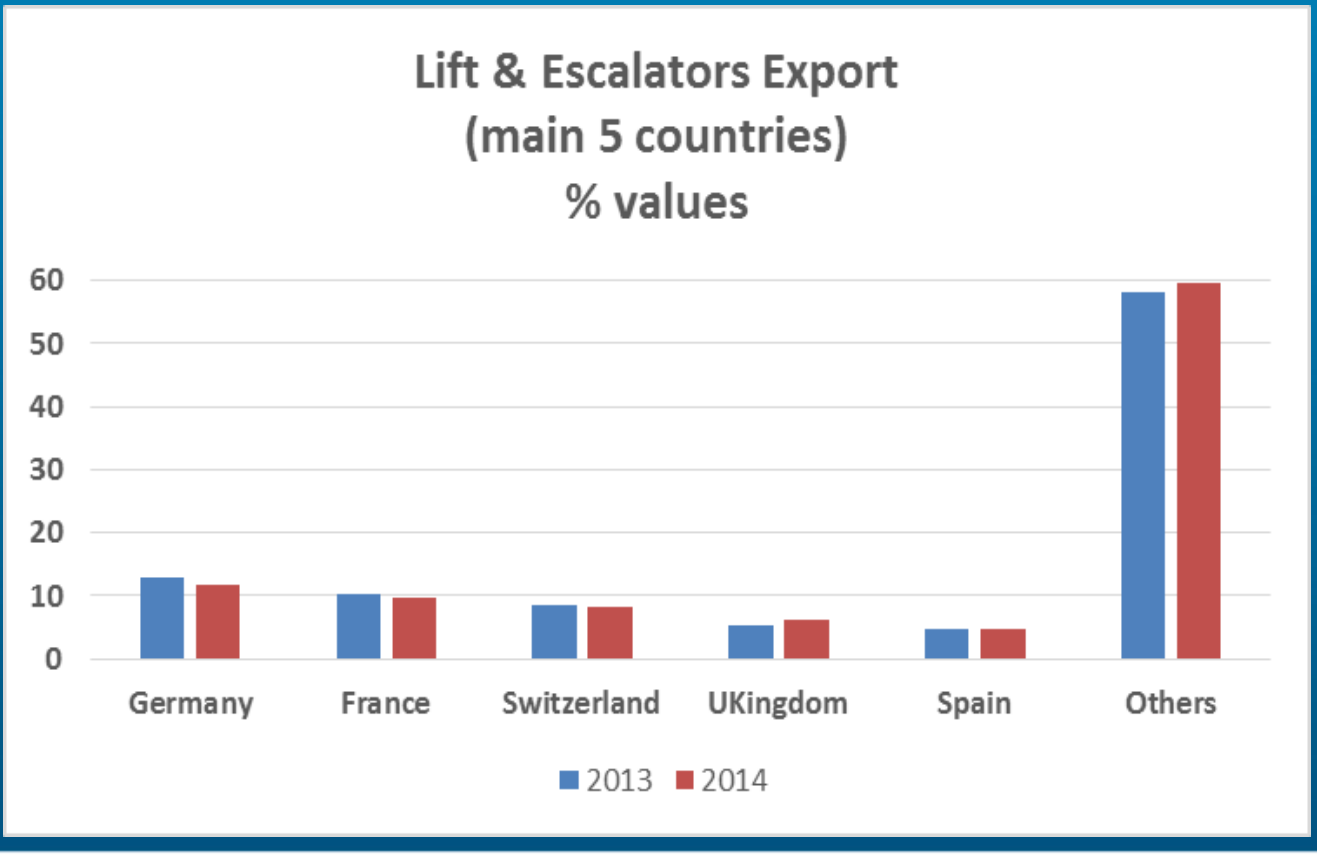
-4.4%

- 2014/2013

-0.2%

(Source AssoAscensori – Report)

LIFT & ESCALATOR EXPORT
by destination country



In 2014

- **EU 55,2%**
- **Asia 19,7%**
- **(ME 14,5%)**

(Source AssoAscensori – Report)

WHAT'S NEXT

Oct 2015

IMF certified a slight economic improvement is underway in Italy

Thomas Helbling
IMF Research Department

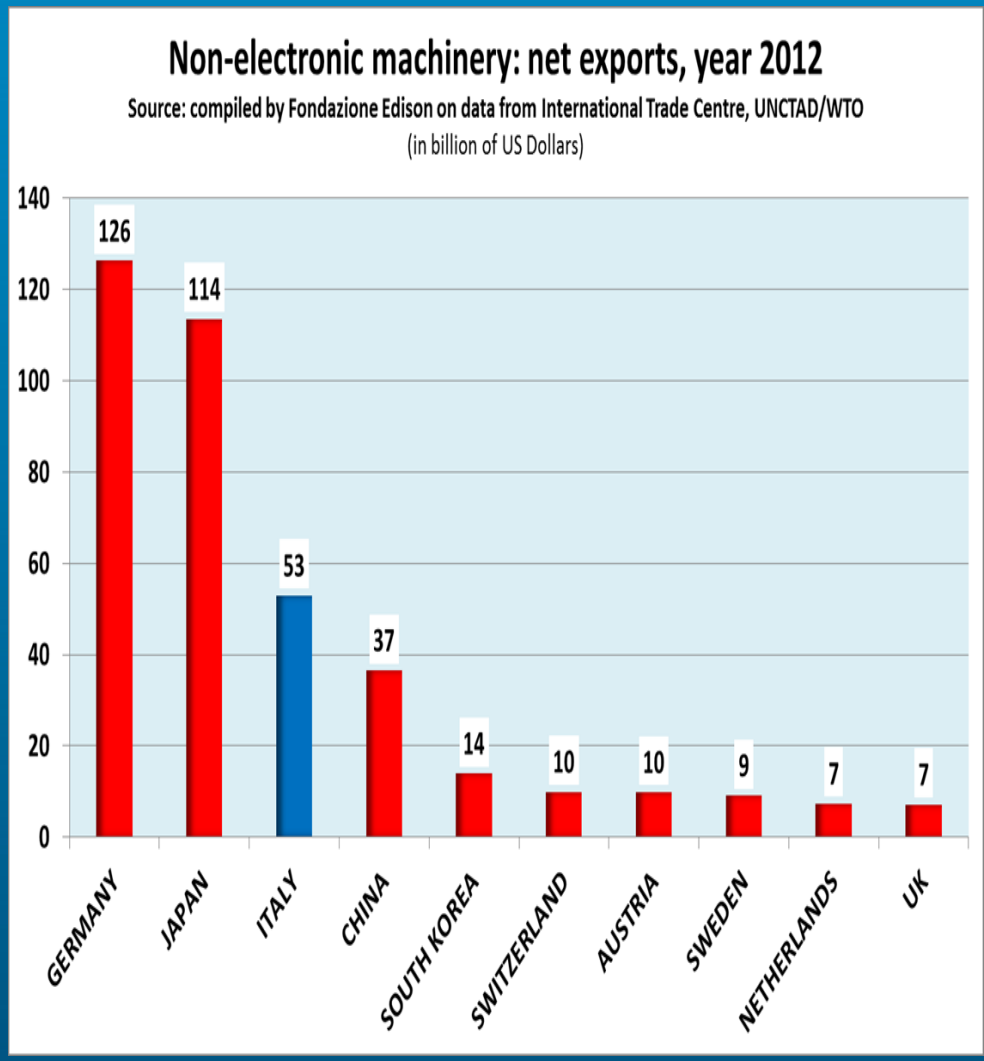
"Italy can do more"

"It's certainly possible that it can do better than Germany under the current economic conditions"

WHAT'S NEXT

Italy is the second largest manufacturer in Europe behind Germany

Italian companies are globalising



WHAT'S NEXT – Construction trend

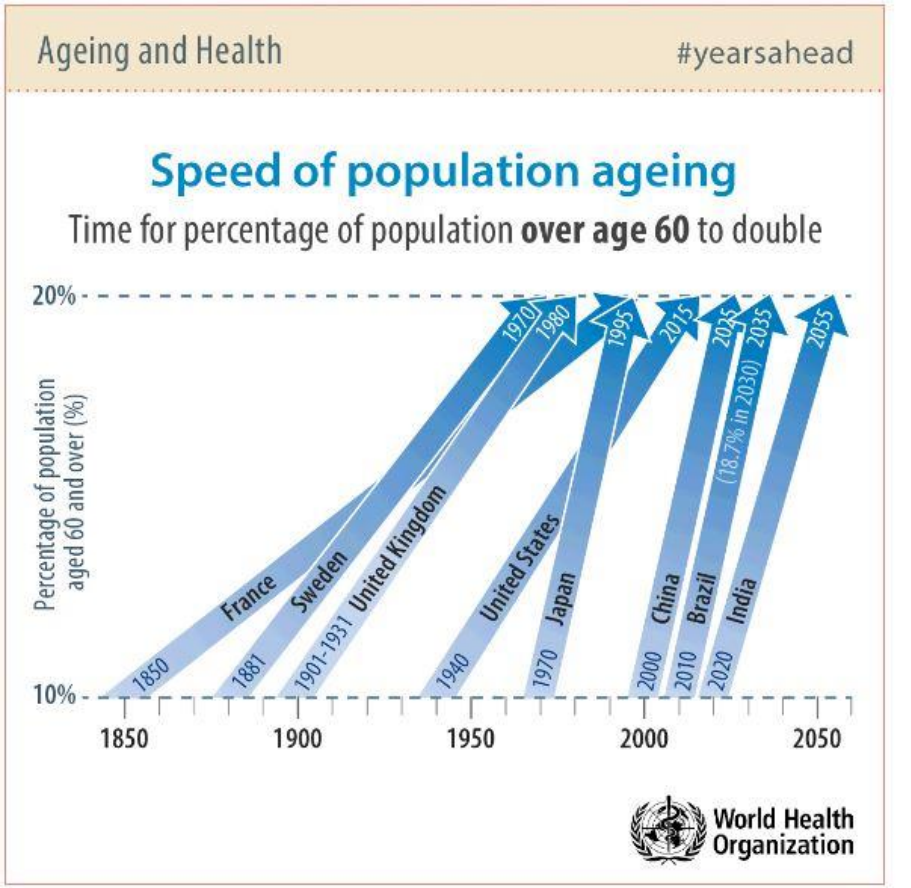
Previsioni 2016: ancora un calo o si avvia la ripresa?

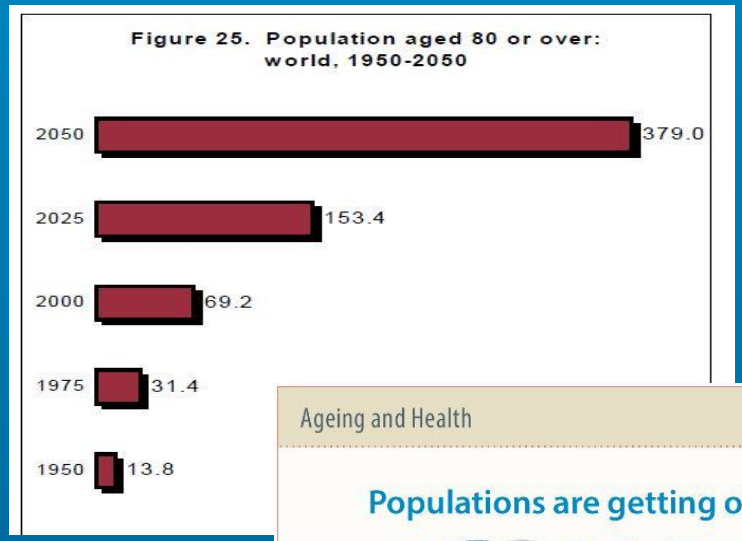
INVESTIMENTI IN COSTRUZIONI*

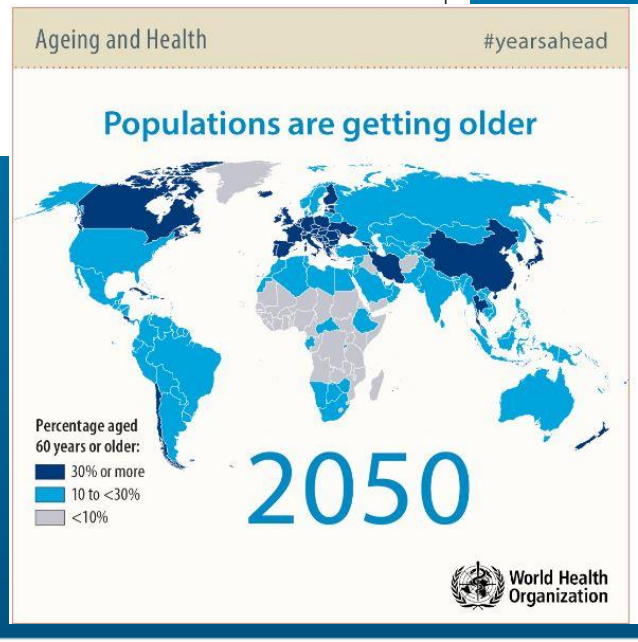
	2015(°) Milioni di euro	2015(°)	2016(°)	2016(°°)
		Variazioni % in quantità		
COSTRUZIONI	128.836	-1,3%	-0,5%	3,2%
.abitazioni	66.572	-1,3%	-1,1%	0,2%
- nuove (°)	*18.677*	*-8,8%*	*-4,1%*	*-3,1%*
- manutenzione straordinaria(°)	*47.895*	*2,0%*	*0,1%*	*1,5%*
.non residenziali	62.265	-1,2%	0,1%	6,4%
- private (°)	*37.981*	*-1,2%*	*-0,4%*	*-0,4%*
- pubbliche (°)	*24.283*	*-1,3%*	*0,8%*	*16,9%*

(*) Investimenti in costruzioni al netto dei costi per trasferimento di proprietà
(°) Stime Ance
(°°) Scenario con proposta Ance che tiene conto dell'impatto sui livelli produttivi della proroga del potenziamento degli incentivi fiscali (50% e 65%) relativi agli interventi di ristrutturazione edilizia e di riqualificazione energetica, di una parziale detassazione degli acquisti di abitazioni nuove in classe energetica elevata e di un rapido avvio di nuove iniziative nei lavori pubblici

WHAT'S NEXT – Ageing population

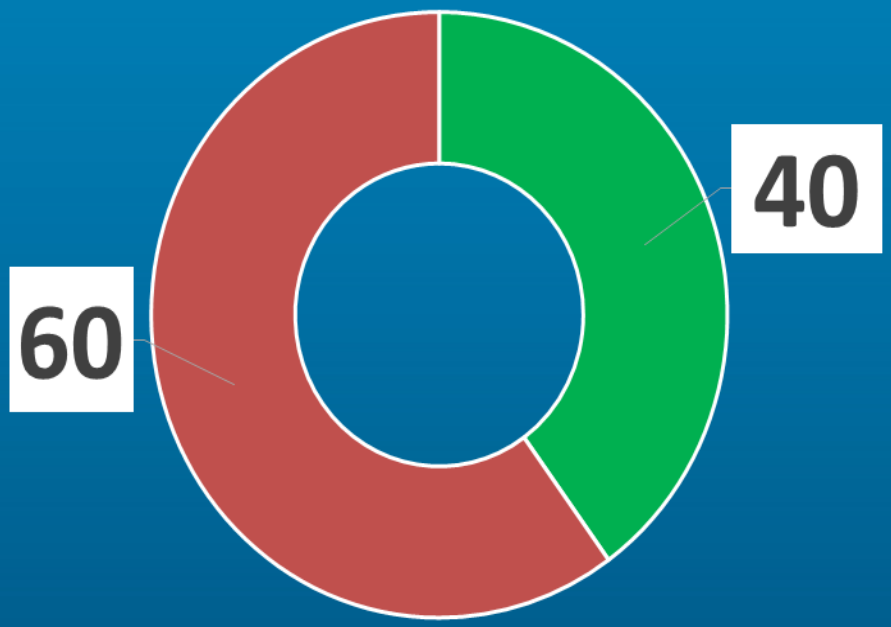






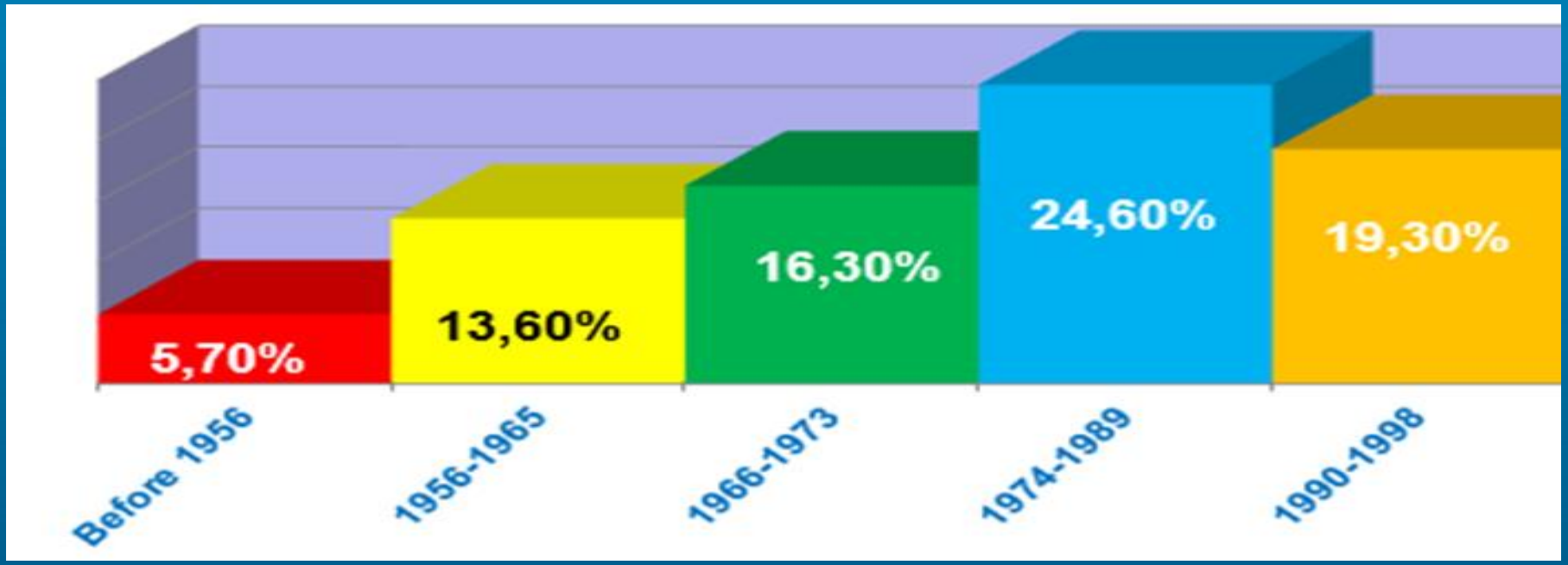
WHAT'S NEXT – Mod market

About 1 million lifts in service



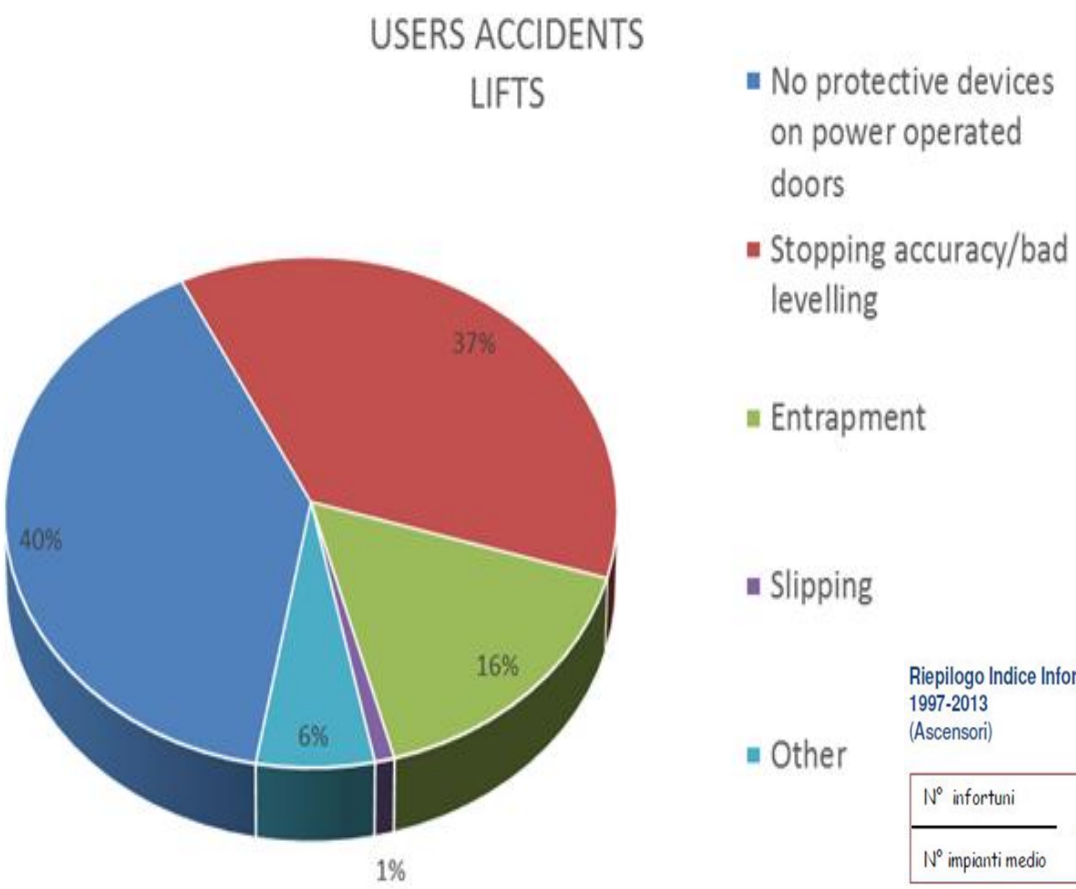
Some 40% has been in service for more than 30 years

WHAT'S NEXT – Mod market
About 1 million lifts in service



Some 60% not equipped with modern technologies

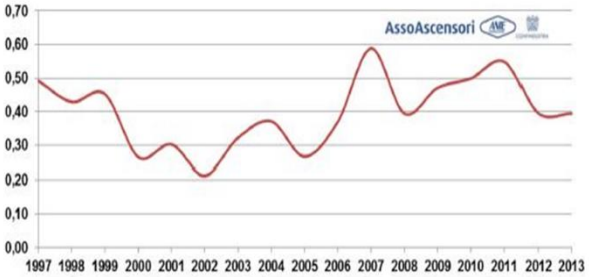
WHAT'S NEXT – Mod & Safety



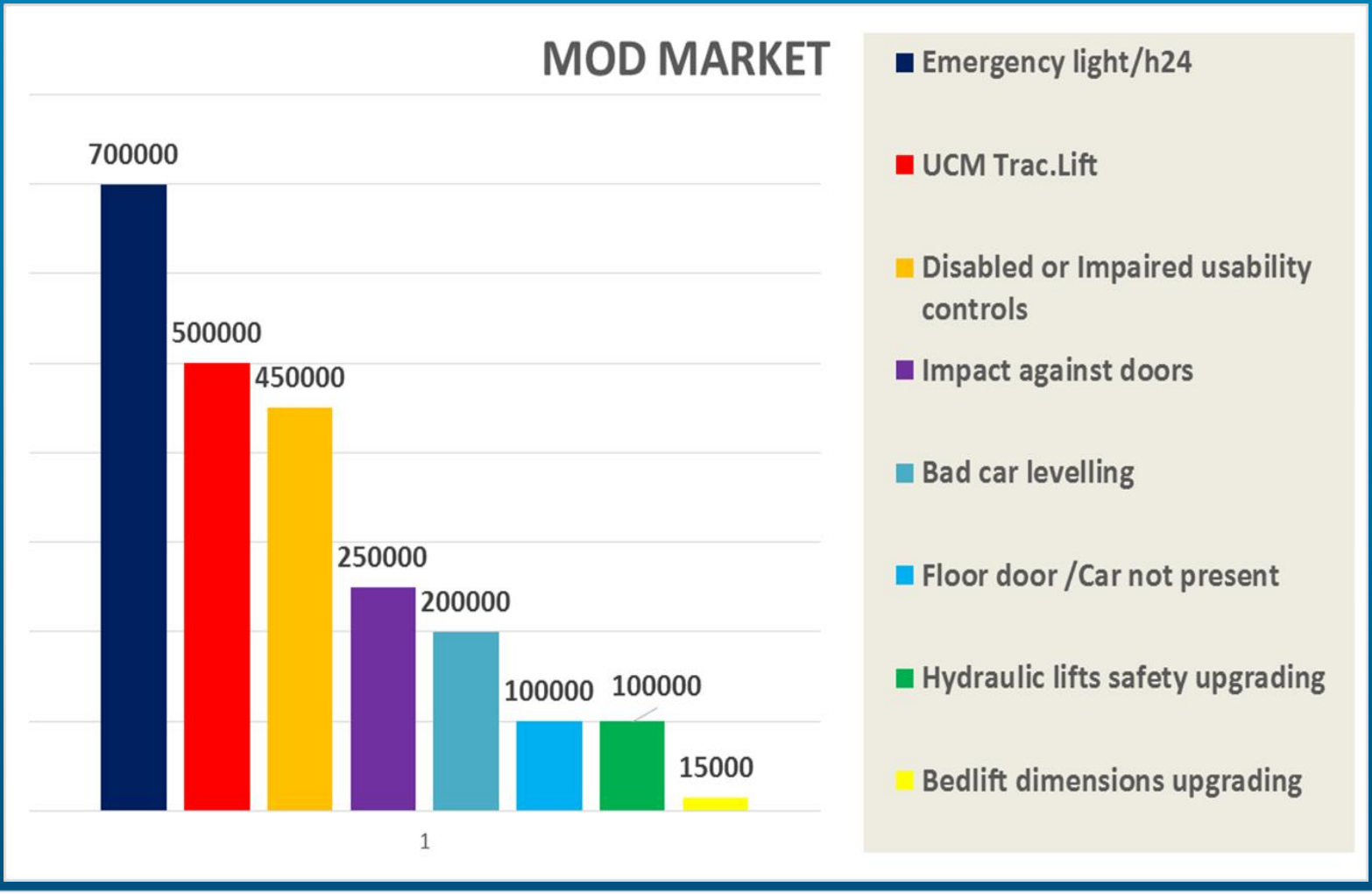
Most accident to users are strictly related to the ageing of lifts or to the fact they are not equipped with modern technologies

Riepilogo Indice Infortuni Utenti 1997-2013 (Ascensori)

$$\frac{\text{N° infortuni}}{\text{N° impianti medio}} \times 1.000$$



WHAT'S NEXT – Mod & Safety



Most accident to users are strictly related to the ageing of lifts or to the fact they are not equipped with modern technologies

WHAT'S NEXT – Accessible tourism

ENAT – Euroepean Network for Accessible Tourism

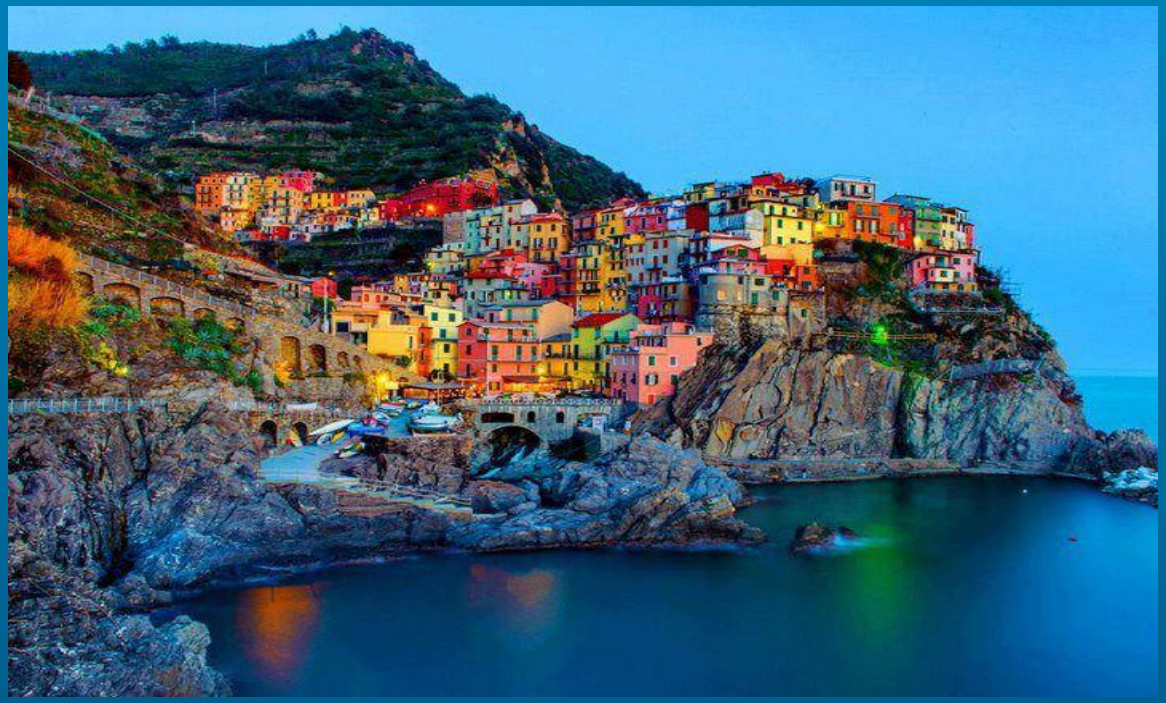
Over 3 million tourism businesses are not prepared to cater adequately to the accessibility market.

By 2020, an additional 1.2 million enterprises need to provide accessible services in order to accommodate the lowest forecasted demand.

WHAT'S NEXT – Accessible tourism

ENAT – Euroepean Network for Accessible Tourism

Only an estimated 9.2% of Europe's tourism services already have some level of provision for travellers with specific access needs.

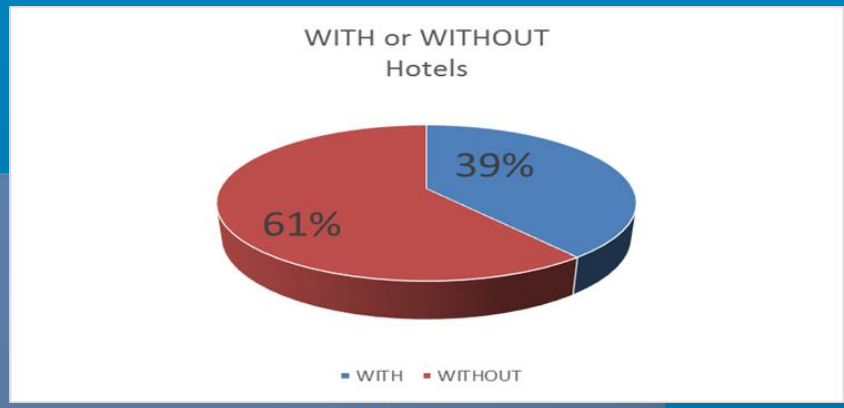


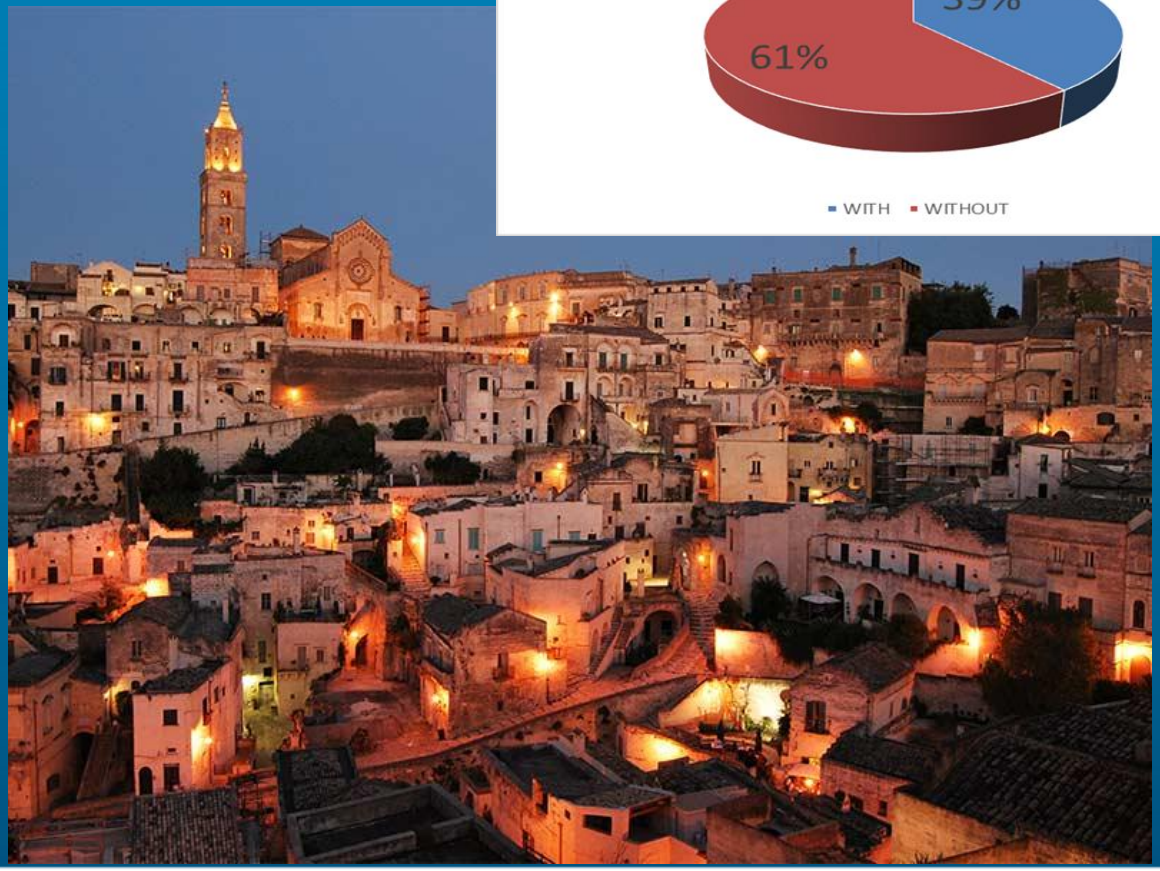
The "front-runner" countries, with the greatest numbers of accessible services, are France, Spain, the UK & Italy.

WHAT'S NEXT – Accessible tourism

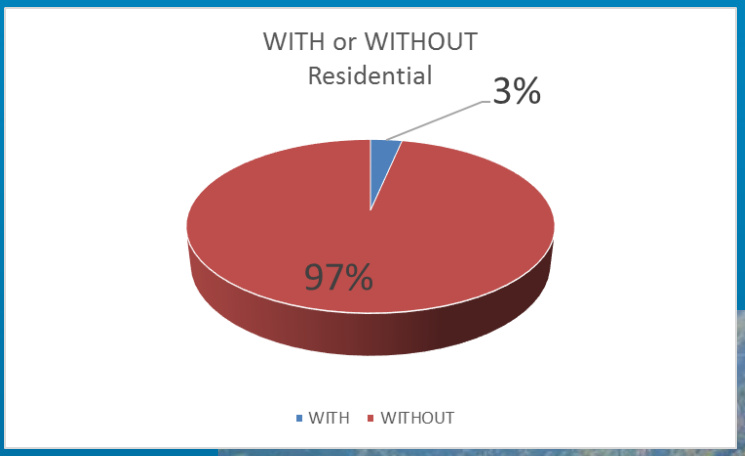
Still a lot to do:

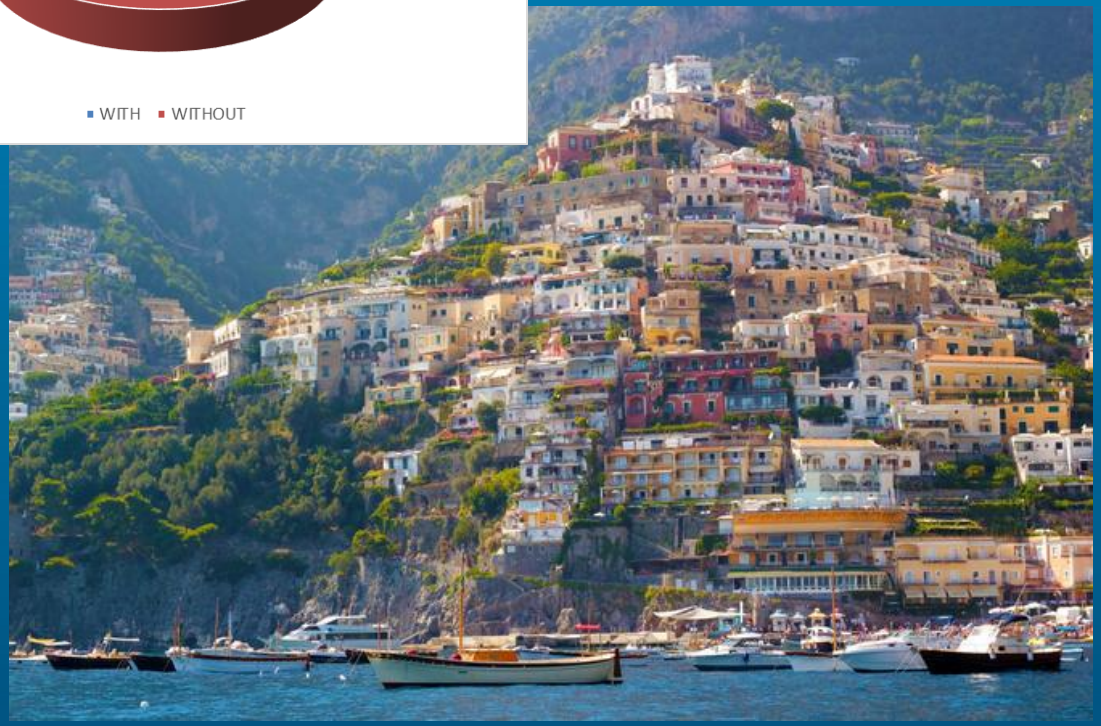
only 39% of Italy's hotels have a lift, a platform lift or a stairlift.





WHAT'S NEXT – Residential housing





Only 3%
of Italy's private residential buildings have
a lift,
a platform lift
or
a stairlift.

WHAT'S NEXT – Residential accessibility

CENSIS, in Italy

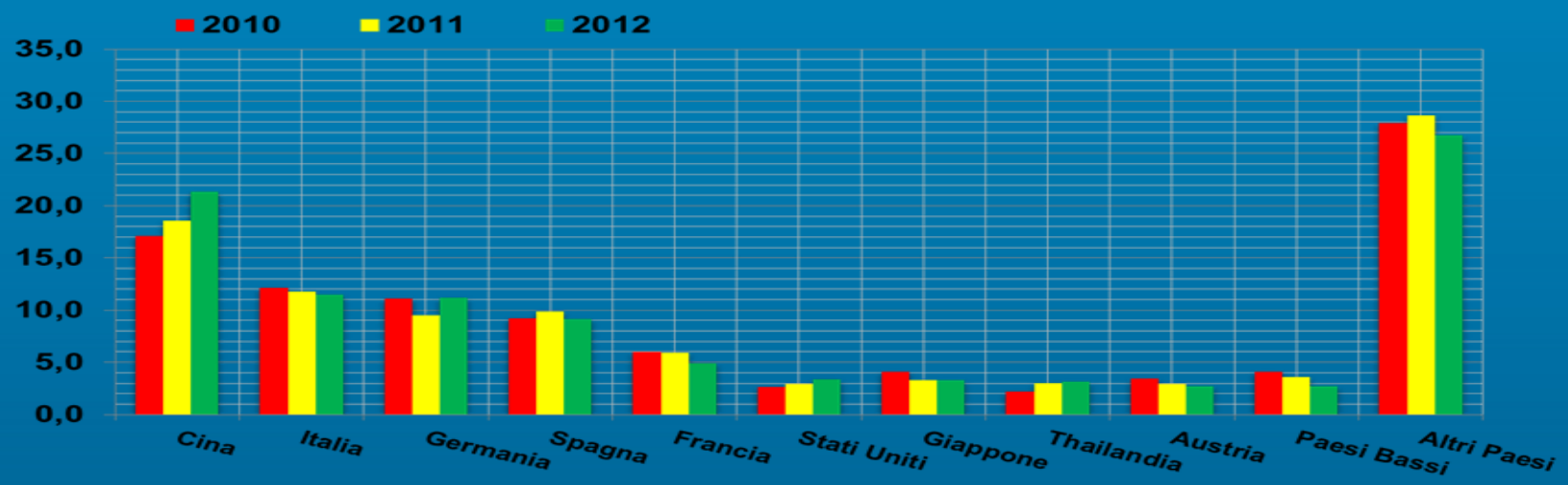
In 2020

4,8 milion disabled citizens (7,9% of population).

In 2040

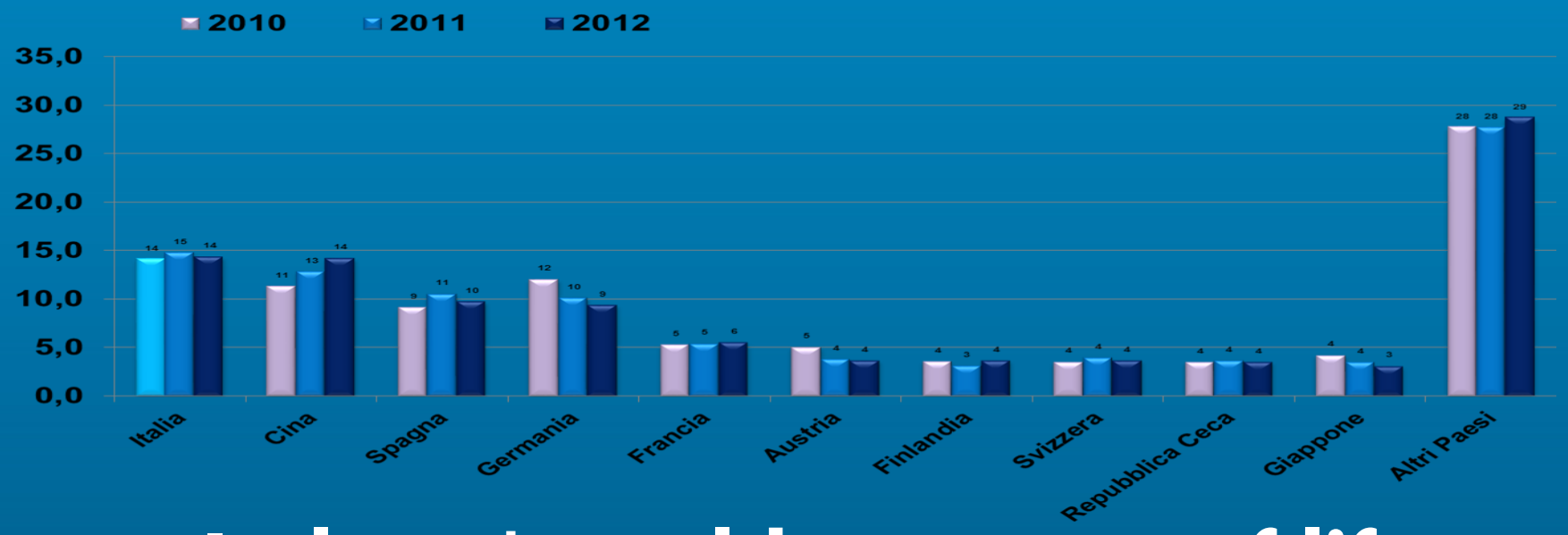
6,7 milion (10,7%).

WHAT'S NEXT – Export Complete Lifts



- **Italy: 2nd world exporter (following China) of complete lifts some 12%**

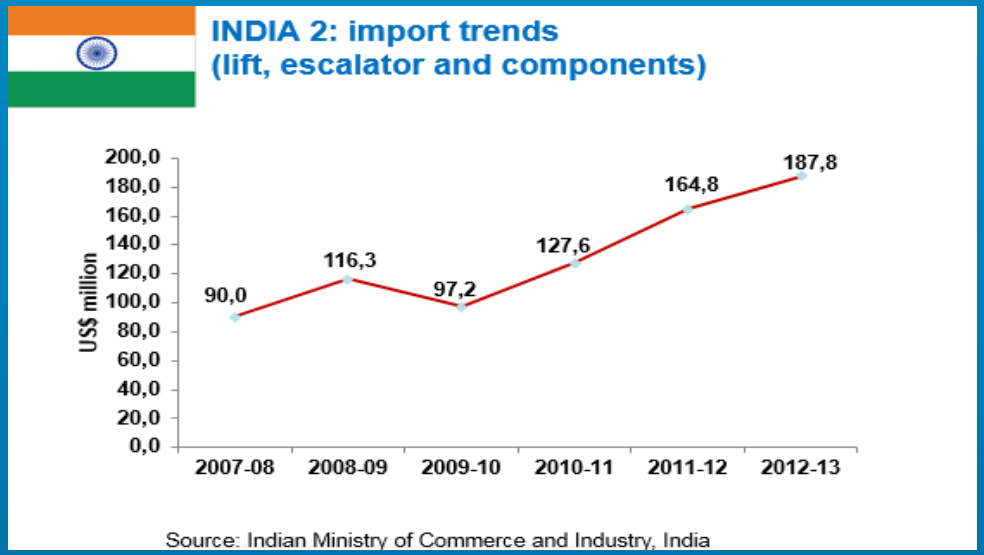
WHAT'S NEXT – Export Lift Components

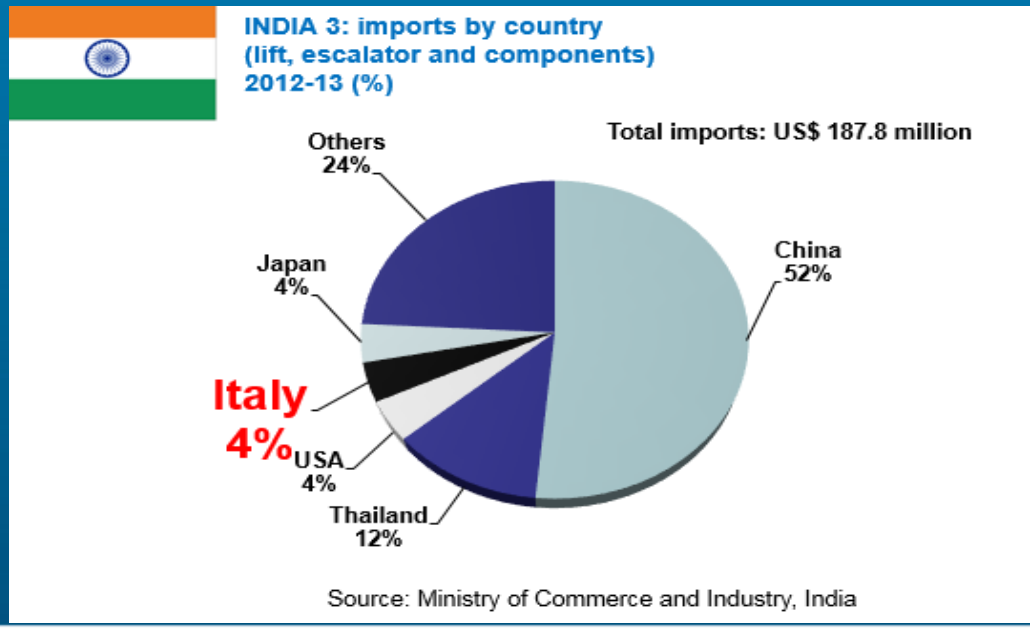


- **Italy: 1st world exporter of lifts components: some 14%**

WHAT'S NEXT
Export
New Markets

The Roman Empire routes towards Asia - 1st Century





WHAT'S NEXT
Energy saving

Back to old traditions

Traction system: 8 slaves

but ...

This technology
Is not available
anymore

New solutions might help

elevatori
THE EUROPEAN ELEVATOR MAGAZINE
Leading technical magazine in Europe
Fabio Liberali
Editorial manager of Elevatori
www.elevatori.it

ELEVATORI
The European Elevator Magazine

www.elevatori.it

fabio.liberali@elevatori.it

HALL 2 – 2116