



Regione Emilia-Romagna
Programma Triennale
Attività Produttive e PRRIITT
2012-2014

Verso il nuovo programma triennale per le attività produttive e il nuovo PRRIITT

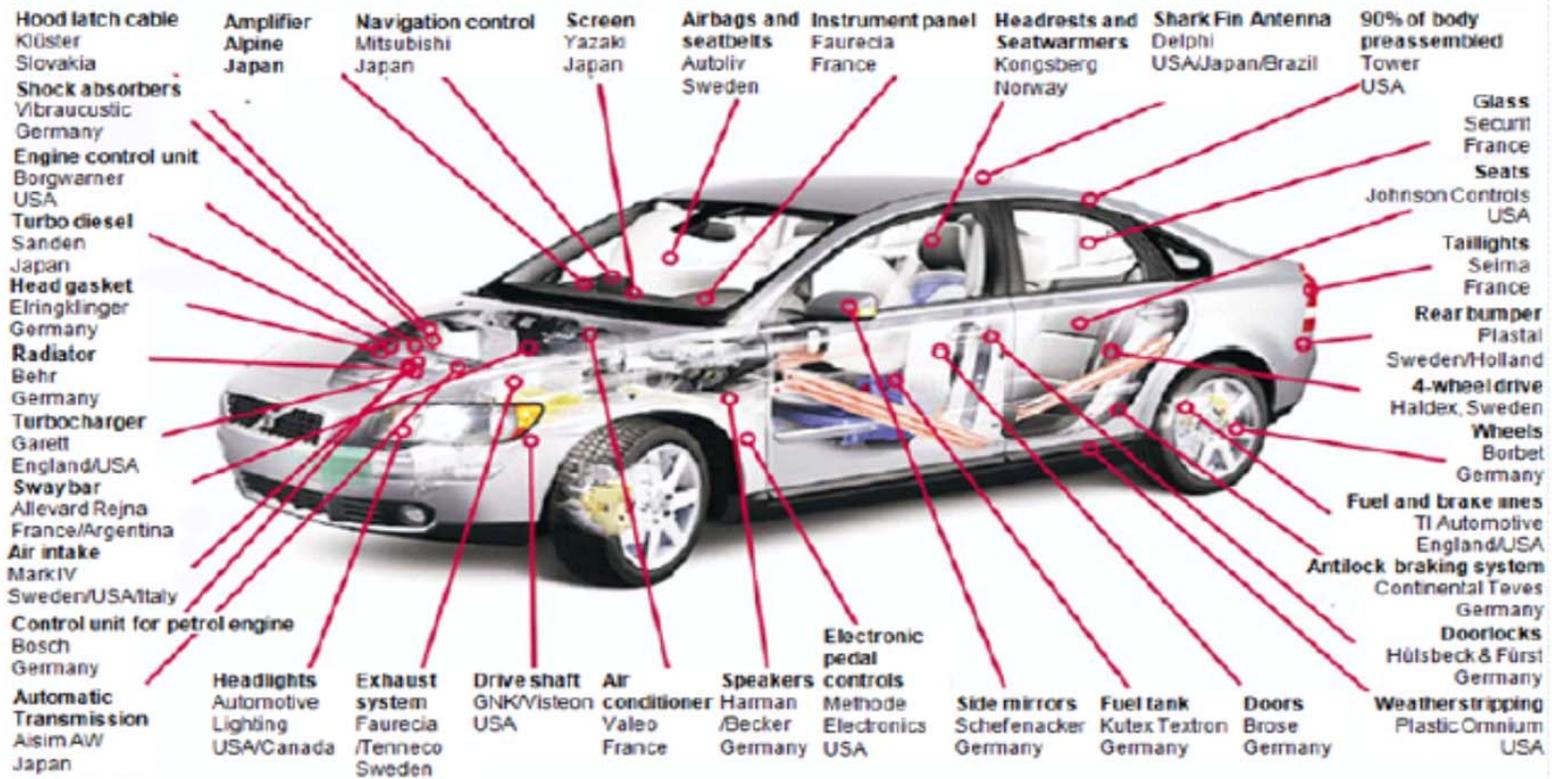
FILIERA DELLA MECCANICA

Quali trasformazioni nelle relazioni
fra le imprese e nella catena del valore

28 novembre 2011
Francesco Cossentino

La Frammentazione Internazionale della Produzione

Figure 6: Where are the components of the Volvo S40 made?

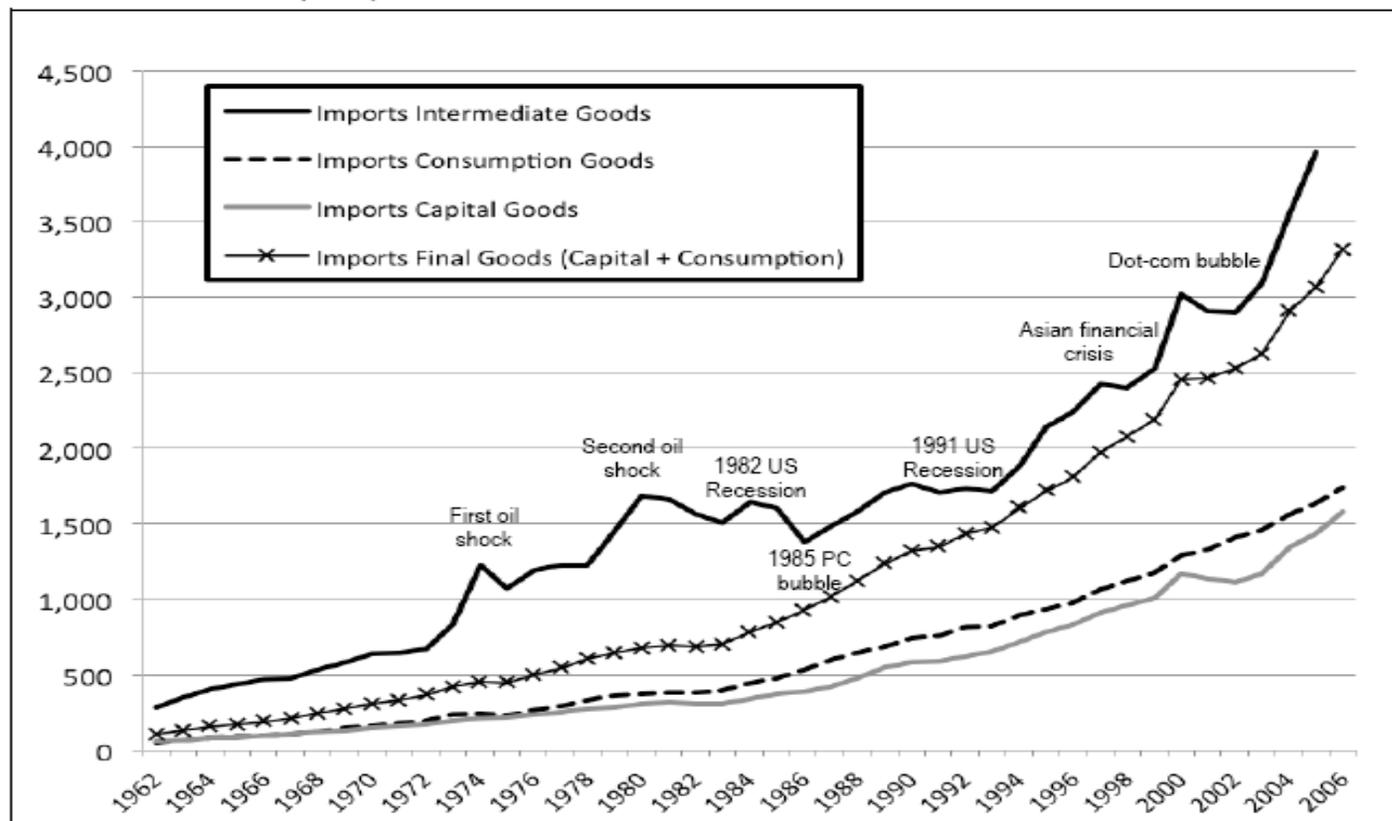


Source: Baldwin and Thornton (2008), taken from a presentation by Ericsson Chairman Michael Treschow.

Lo sviluppo di beni intermedi

Fonte: T.J Sturgeon, O. Memedovic (2011)

Figure 1 World imports of intermediate, capital and consumption goods 1962-2006, in Billions of Constant (2000) US Dollars



Source: SITC Rev 1 and 3 data; WITS; BEC.

Note: To identify commodities as Consumption, Capital and Intermediate goods, two conversion tables have been used: BEC to SITC Rev 3 from UNSD, and BEC to SITC Rev 1 from WITS. To calculate constant price data, National Accounts data from UNIDO Statistics Unit and a GDP deflator to the year 2000 has been applied.

Componentistica Oleodinamica

Importazioni ed Esportazioni

Fonte: UN Comtrade

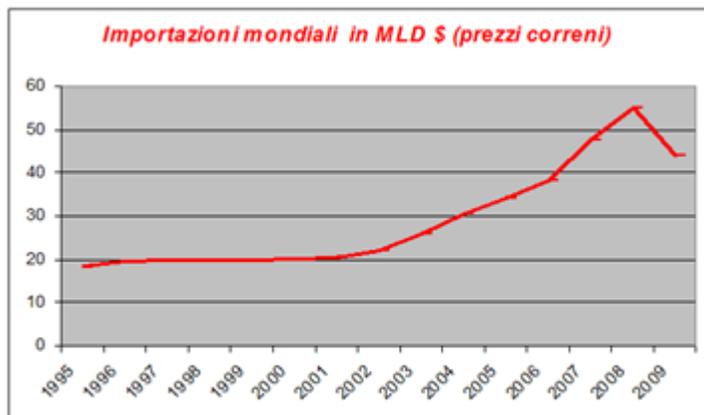


Table 2: Top exporting countries or areas in 2009

Country or area	Value (million US\$)	Avg. Growth (%) 05-09	Growth (%) 08-09	World share %	
					Cum.
World.....	43 111.2	6.3	-20.5	100.0	
Germany.....	8 315.0	1.6	-27.6	19.3	19.3
USA.....	5 504.3	8.4	-14.6	12.8	32.1
Italy.....	3 574.2	4.0	-19.9	8.3	40.3
Japan.....	3 485.1	6.6	-17.1	8.1	48.4
China.....	2 900.1	21.4	-11.2	6.7	55.2
France.....	2 421.7	4.4	-16.6	5.6	60.8
United Kingdom.....	1 633.5	2.7	-21.0	3.8	64.6
Netherlands.....	1 401.7	21.5	-9.0	3.3	67.8
Czech Rep.....	1 003.1	-7.6	-32.4	2.3	70.1
Denmark.....	960.9	3.9	-25.4	2.2	72.4
Canada.....	936.5	1.1	-24.5	2.2	74.5
Mexico.....	923.3	12.2	-18.1	2.1	76.7
Norway.....	809.7	20.5	-12.2	1.9	78.6
Sweden.....	788.0	5.7	-24.4	1.8	80.4
Rep. of Korea.....	735.0	17.2	-4.5	1.7	82.1

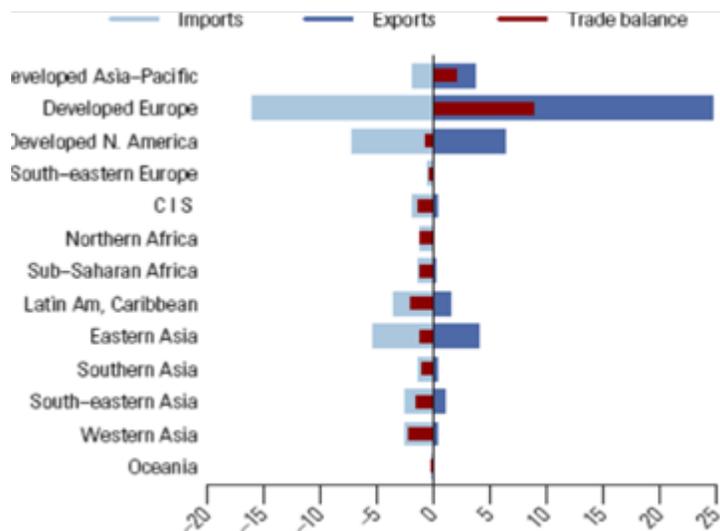


Table 3: Top importing countries or areas in 2009

Country or area	Value (million US\$)	Avg. Growth (%) 05-09	Growth (%) 08-09	World share %	
					Cum.
World.....	44 021.3	6.5	-20.2	100.0	
USA.....	5 261.8	2.4	-24.0	12.0	12.0
China.....	3 215.1	17.8	-5.4	7.3	19.3
Germany.....	3 164.8	5.7	-23.6	7.2	26.4
France.....	2 112.2	-1.5	-25.2	4.8	31.2
Canada.....	1 821.9	1.4	-14.9	4.1	35.4
United Kingdom.....	1 710.0	2.6	-27.5	3.9	39.3
Rep. of Korea.....	1 544.5	13.3	1.4	3.5	42.8
Italy.....	1 343.0	-0.9	-28.9	3.1	45.8
Mexico.....	1 099.7	8.3	-15.4	2.5	48.3
Russian Federation.....	993.6	17.6	-42.4	2.3	50.6
Belgium.....	923.8	3.3	-23.0	2.1	52.7
Japan.....	911.2	2.9	-26.3	2.1	54.7
Netherlands.....	786.9	6.1	-28.8	1.8	56.5
Spain.....	740.6	-1.3	-30.6	1.7	58.2
United Arab Emirates.....	736.2	28.1	6.0	1.7	59.9

Macchine Utensili per metalli e altri materiali

Fonte: UN Comtrade

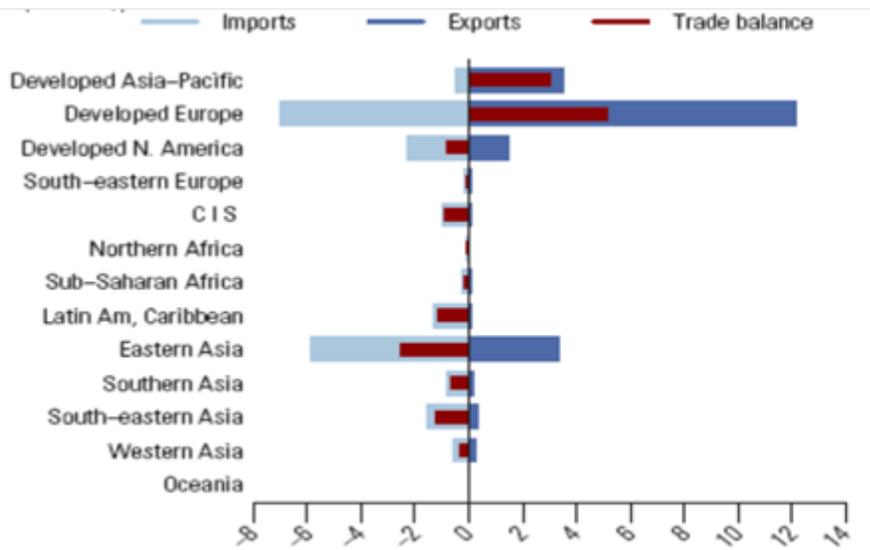


Table 2: Top exporting countries or areas in 2009

Country or area	Value (million US\$)	Avg. Growth (%) 05-09	Growth (%) 08-09	World share %	
					Cum.
World.....	21 514.0	-5.7	-41.7	100.0	
Germany.....	5 317.1	1.7	-30.2	24.7	24.7
Japan.....	3 445.5	-17.4	-59.2	16.0	40.7
Italy.....	1 888.7	7.0	-24.4	8.8	49.5
Switzerland.....	1 479.4	-6.8	-48.6	6.9	56.4
USA.....	1 336.1	-19.9	-35.2	6.2	62.6
Other Asia, nes.....	1 324.2	-9.6	-55.3	6.2	68.7
China.....	954.2	9.8	-34.5	4.4	73.2
Rep. of Korea.....	863.0	-0.1	-38.5	4.0	77.2
Spain.....	632.7	14.6	-20.9	2.9	80.1
Czech Rep.....	532.2	9.7	-32.4	2.5	82.6
Belgium.....	427.5	-2.8	-57.6	2.0	84.6
United Kingdom.....	409.0	-10.5	-42.8	1.9	86.5
Austria.....	397.9	11.1	-19.0	1.8	88.3
France.....	310.7	-3.4	-35.3	1.4	89.8
Singapore.....	212.8	-8.2	-51.2	1.0	90.8

Table 3: Top importing countries or areas in 2009

Country or area	Value (million US\$)	Avg. Growth (%) 05-09	Growth (%) 08-09	World share %	
					Cum.
World.....	21 438.5	-5.9	-41.9	100.0	
China.....	4 559.0	-0.3	-19.6	21.3	21.3
USA.....	1 926.8	-14.6	-54.4	9.0	30.3
Germany.....	1 857.7	-0.2	-49.2	8.7	38.9
Rep. of Korea.....	808.4	-18.5	-25.3	3.8	42.7
Italy.....	708.1	-8.0	-61.1	3.3	46.0
India.....	687.9	7.0	-44.1	3.2	49.2
Russian Federation.....	685.8	26.6	-32.5	3.2	52.4
France.....	610.3	-8.6	-45.7	2.8	55.2
Mexico.....	530.0	-6.2	-37.4	2.5	57.7
Belgium.....	494.2	-2.8	-54.5	2.3	60.0
Brazil.....	476.6	9.1	-43.6	2.2	62.2
Thailand.....	437.3	-12.4	-41.1	2.0	64.3
Switzerland.....	433.2	2.7	-39.8	2.0	66.3
Viet Nam.....	426.5	34.1	14.1	2.0	68.3
Poland.....	397.9	5.3	-30.2	1.9	70.2



Parti e componenti per macchine utensili

Importazioni ed Esportazioni

Fonte: UN Comtrade



Table 2: Top exporting countries or areas in 2009

Country or area	Value (million US\$)	Avg. Growth (%) 05-09	Growth (%) 08-09	World share %	
					Cum.
World.....	10446.9	-2.9	-36.1	100.0	
Germany.....	2002.8	-3.0	-37.8	19.2	19.2
USA.....	1253.1	-6.8	-26.9	12.0	31.2
Japan.....	830.3	-13.6	-41.1	7.9	39.1
Italy.....	749.3	-1.5	-39.9	7.2	46.3
Switzerland.....	715.3	-3.9	-39.3	6.8	53.1
France.....	534.4	0.7	-33.1	5.1	58.2
China.....	451.6	5.8	-49.8	4.3	62.6
Other Asia, nes.....	330.7	-2.3	-37.8	3.2	65.7
Netherlands.....	315.5	26.7	-49.3	3.0	68.8
United Kingdom.....	283.7	-9.7	-29.6	2.7	71.5
Austria.....	262.1	12.9	-24.5	2.5	74.0
Belgium.....	251.1	0.4	-34.5	2.4	76.4
Rep. of Korea.....	243.5	6.5	-15.1	2.3	78.7
Sweden.....	241.7	-0.4	-51.2	2.3	81.0
Singapore.....	226.1	-10.2	-19.4	2.2	83.2

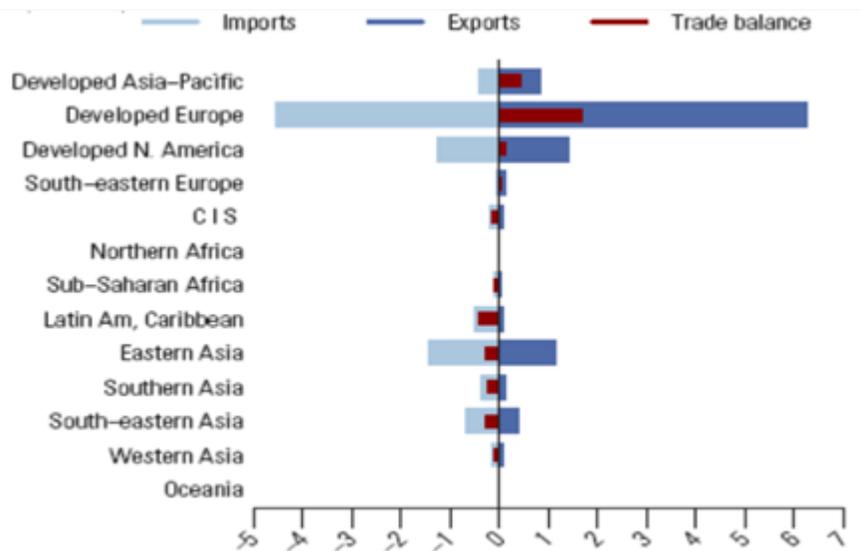
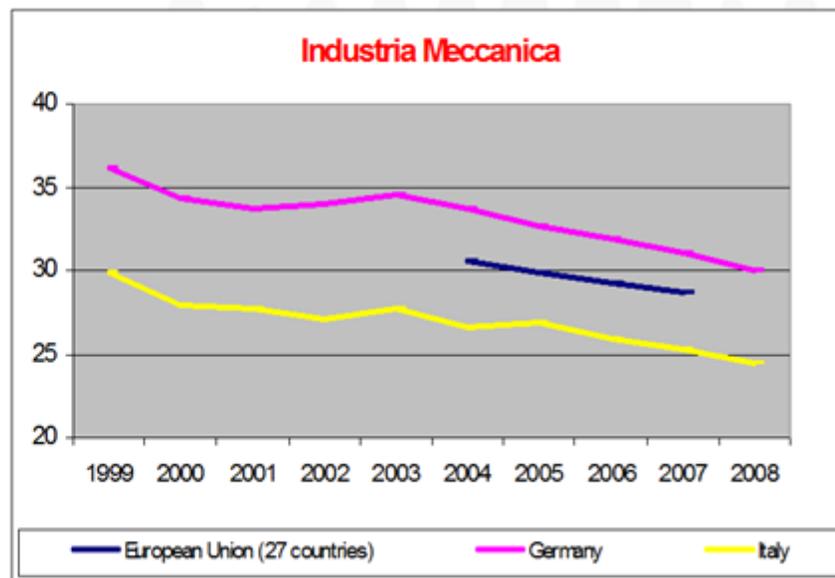
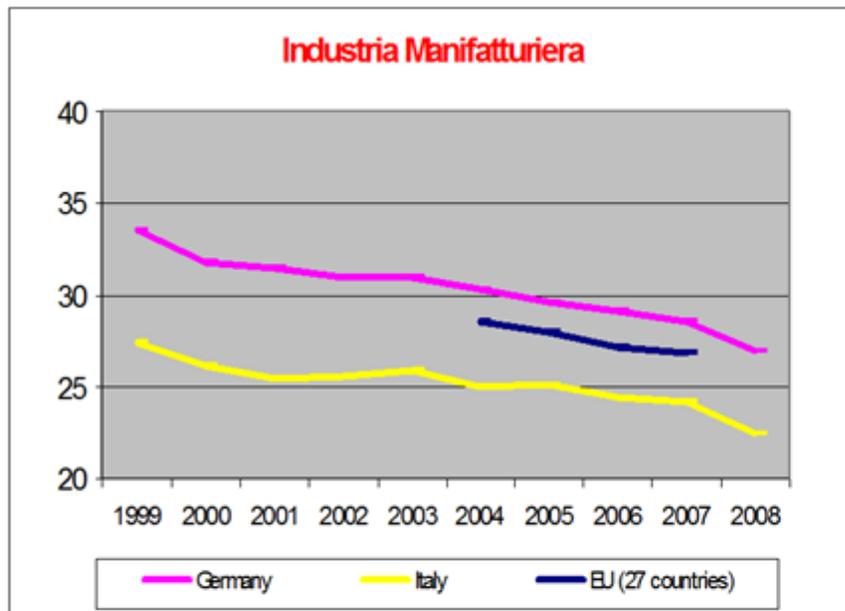


Table 3: Top importing countries or areas in 2009

Country or area	Value (million US\$)	Avg. Growth (%) 05-09	Growth (%) 08-09	World share %	
					Cum.
World.....	9780.6	-3.0	-37.4	100.0	
USA.....	1010.9	-9.5	-39.2	10.3	10.3
Germany.....	1009.8	-2.1	-39.6	10.3	20.7
China.....	955.3	4.6	-13.4	9.8	30.4
France.....	472.6	-6.6	-36.5	4.8	35.3
Switzerland.....	401.0	-1.5	-46.2	4.1	39.4
Italy.....	385.1	-0.5	-41.5	3.9	43.3
Japan.....	356.4	-12.1	-49.7	3.6	46.9
United Kingdom.....	345.2	-8.3	-41.6	3.5	50.5
Netherlands.....	286.9	15.6	-51.0	2.9	53.4
Mexico.....	286.2	-3.7	-37.2	2.9	56.3
Austria.....	269.3	1.3	-35.9	2.8	59.1
Canada.....	258.8	-7.8	-33.1	2.6	61.7
Rep. of Korea.....	246.7	-6.9	-24.3	2.5	64.3
Singapore.....	246.6	-4.0	-29.3	2.5	66.8
Belgium.....	246.4	-12.8	-42.6	2.5	69.3

La disintegrazione verticale della produzione

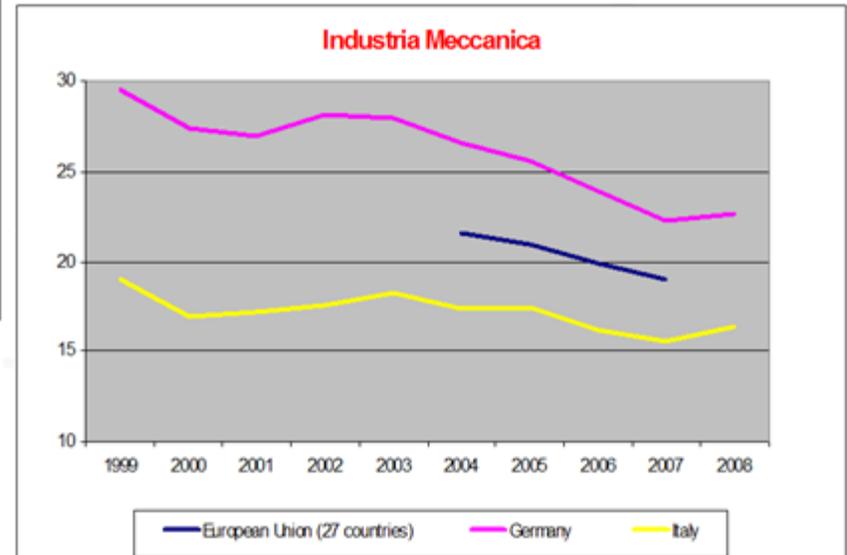
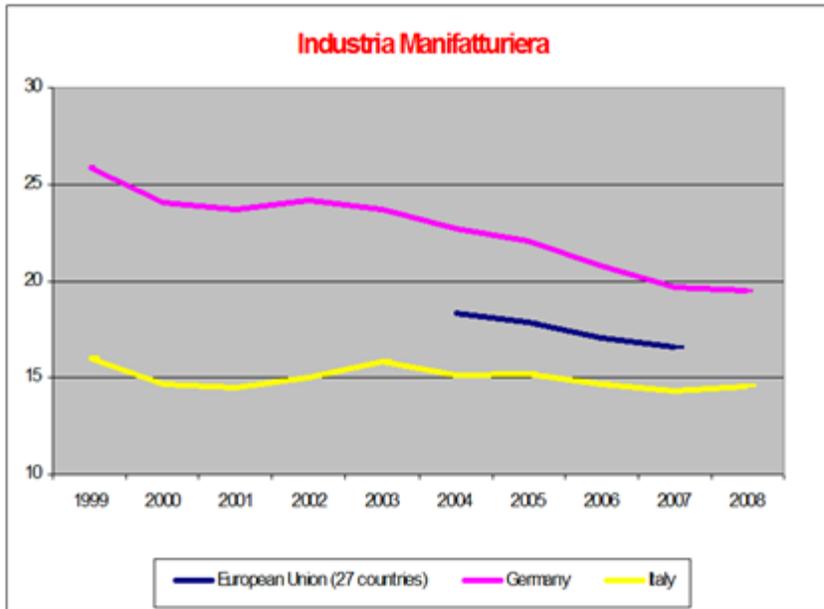
(quota del valore aggiunto sul valore della produzione. Fonte: Eurostat)





La contrazione del costo del lavoro diretto

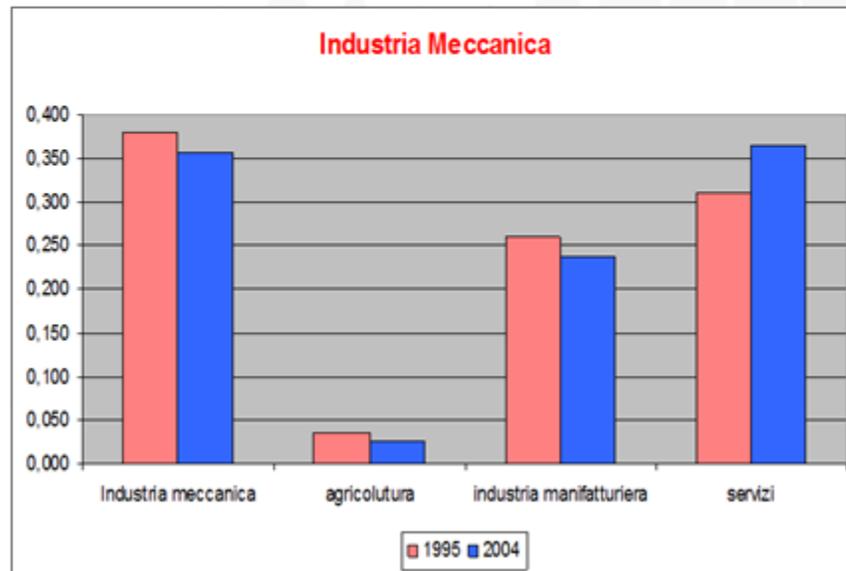
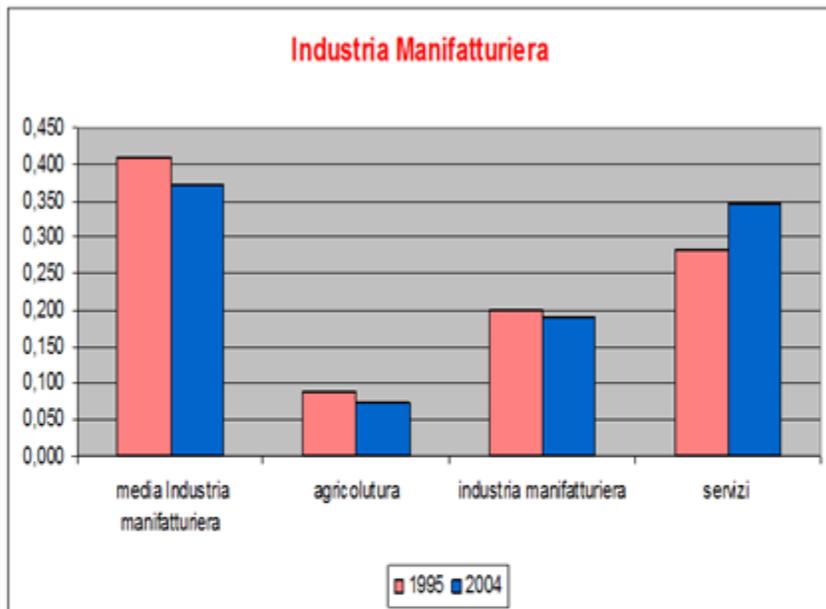
(quota del costo del lavoro sul valore della produzione.
Fonte Eurostat)





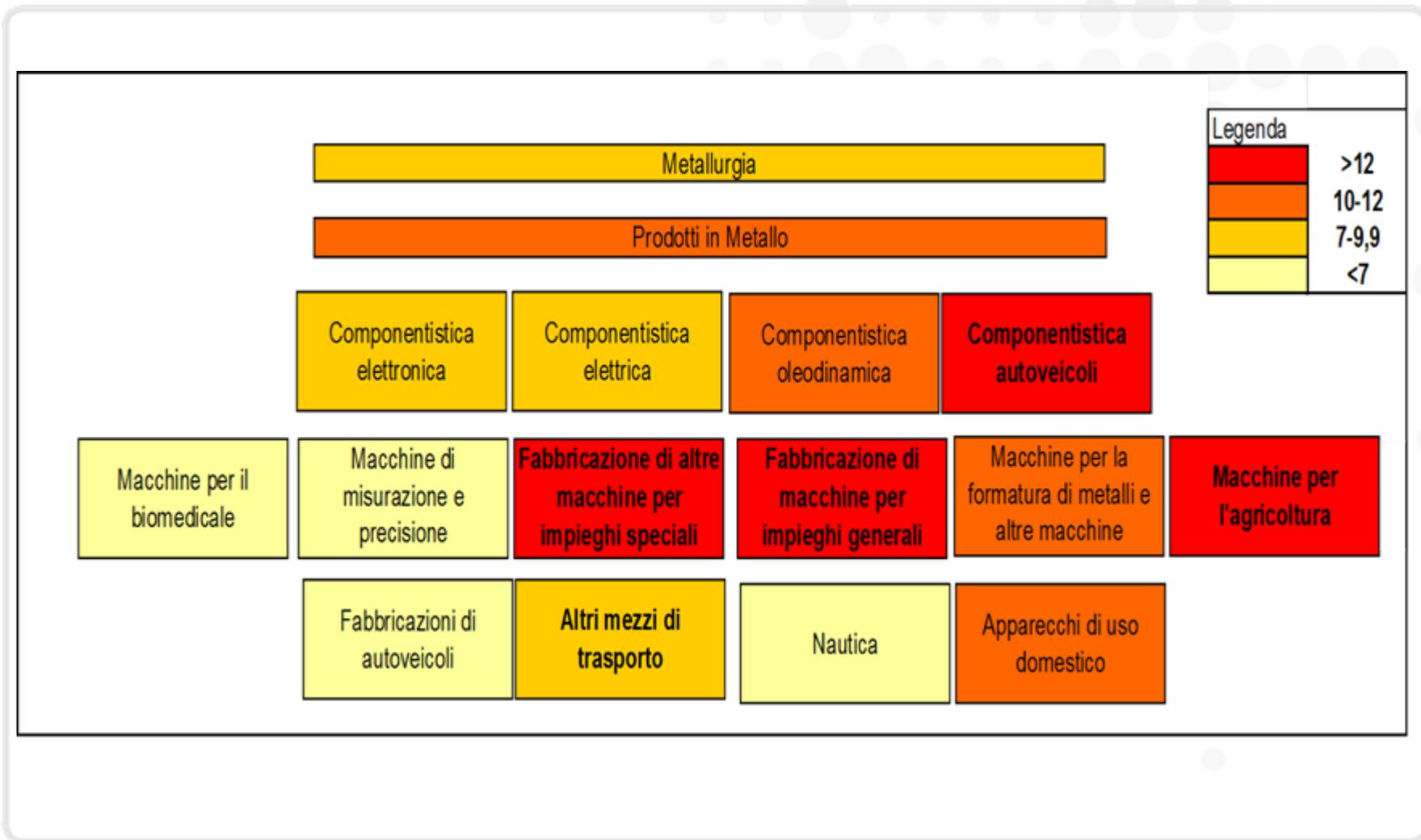
Attivazione di lavoro diretto e indiretto per una unità di domanda nell'industria Italiana.

Fonte Istat, Tavole Input-output



La filiera della meccanica

Incidenza delle esportazioni regionali sul totale nazionale (%)



Elementi per la discussione

- Quale è stato il coinvolgimento dell'industria meccanica in tali trasformazioni?
- Come si colloca la filiera meccanica dell'Emilia-Romagna nella nuova divisione internazionale del lavoro come fornitore/acquirente di beni intermedi oltre che come produttore di beni finali.
- Come si sono ridefinite le relazioni fra imprese committenti e imprese di subfornitura?
- Quale è stato l'impatto della crisi internazionale
- Le numerose imprese subfornitrici hanno saputo affrancarsi dall'egemonia dei committenti e proporre nuovi prodotti e/o nuovi sbocchi nei mercati internazionali?
- Quali sono i fattori di successo o di ostacolo per le imprese di subfornitura nel risalire lungo le catene del valore e mettersi al riparo dalla concorrenza dei subfornitori a più basso costo del lavoro.
- Le imprese committenti hanno ricorso alla subfornitura internazionale? Quali riflessi ha avuto sulla subfornitura locale?

Grazie per l'attenzione