

## Sector-specific opportunities

### Background

The Department for International Trade (DIT) publish over 1,000 business opportunities per month across all sectors and over 100 markets. Sign up to receive regular export opportunities alerts at: [www.exportingisgreat.gov.uk](http://www.exportingisgreat.gov.uk)

Access high value public procurement notices via Tenders Electronic Daily (TED) at: [www.ted.europa.eu/TED/main/HomePage.do](http://www.ted.europa.eu/TED/main/HomePage.do). TED contains all procurement notices above a certain threshold from the EU and European Economic Area (EEA). See also: [www.ojec.com/?aspxerrorpath=/thresholds.aspx](http://www.ojec.com/?aspxerrorpath=/thresholds.aspx)

**Opportunities:** Italy has a highly diversified economy and can offer opportunities in many sectors:

### Aerospace

The Italian aerospace industry is the third largest in Europe and the seventh worldwide. The sector has:

- a turnover of EUR €13 billion
- exports worth EUR €7 billion
- over 100 hundred companies, with 64,000 direct and indirect employees

The leading aerospace clusters are in:

- Piedmont and Lombardy
- Lazio and Umbria
- Campania and Apulia

The DIT aerospace team in Italy has strong relationships with many Italian and British trade associations. The team is present at major air shows, including Farnborough, to help UK companies source business and R&D opportunities in the Italian market.

Contact: [milancommerciaLENquiries@fco.gov.uk](mailto:milancommerciaLENquiries@fco.gov.uk) for more details on aerospace opportunities.

*[Source: Department for International Trade (DIT) (Feb 2016)]*

### Automotive

In 2014 the index of vehicle industrial production in Italy recovered with a production rate reaching 84.4%. National production increased by 6% compared with 2013. This is after a number of difficult years for the Italian automotive industry.

Sales of alternative, more environmental friendly vehicles are rising with hybrid, Liquefied Petroleum Gas (LPG) and Compressed Natural Gas (CNG) vehicles now accounting for 53% of total turnover.

The three main sub-sectors offering relevant opportunities for UK companies are:

- components
- Research and Development (R&D)
- motorsport

Contact: milancommercialenquiries@fco.gov.uk for more details on automotive opportunities.

*[Source: Department for International Trade (DIT) (Feb 2016)]*

## Defence and security

Italy's defence and security industry has a total market size of about £2.32 billion. Italy's security focus is on:

- terrorism
- immigration (border control)
- organised crime and people trafficking
- safety of transportation services
- cyber security/critical national infrastructure
- disaster relief and mitigation

Transportation is a priority as major airports and seaports have become primary security concerns. These infrastructures are currently seeking to upgrade security resources and services to ensure 100% screening of passengers and work personnel.

Contact Export Control Organisation (ECO) to check your goods are meeting legal requirements for export. See: [www.gov.uk/government/organisations/export-control-organisation](http://www.gov.uk/government/organisations/export-control-organisation)

Contact: milancommercialenquiries@fco.gov.uk for more details on defence and security opportunities.

*[Source: Department for International Trade (DIT) (Feb 2016)]*

## Education

The Italian Ministry of Education, University and Research (MIUR) is currently reforming schools, focusing on:

- improvement of foreign language learning, digital skills and economic studies in secondary schools
- continuous and compulsory training for teachers
- online availability of school data and national teachers' registry
- adoption of broadband and WiFi in all schools

Additionally, more than EUR €3 billion is available from European Regional Development Funds and European Social Funds to enhance Italian education. This is 40% higher than in the previous programme and will be spent between 2014 and 2020 on:

- improving students' skills
- innovating school structures
- developing teachers' competences

The funds will be allocated nationwide to:

- reduce student drop outs, strengthen students' capabilities, train all school staff
- enhance the education system through increased usage of new technologies
- increase transparency and efficiency in administration and financial management
- improve communication and information systems

These reforms and additional funds represent a great opportunity for UK education suppliers.

Contact: milancommercialenquiries@fco.gov.uk for more details on education opportunities.

*[Source: Department for International Trade (DIT) (Feb 2016)]*

## Healthcare and life sciences

The Italian National Health System (SSN) is going through an in-depth reform and modernisation process to take into account:

- ageing population
- move of patients to outpatient care
- increased focus on prevention
- acceleration of e-health development

There are opportunities for:

- innovative equipment and medical devices
- diagnostic (portable) equipment and kits
- innovative daily life-aids for elderly and disabled
- e-care and e-health devices
- food supplements and dietary foods

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## Luxury and design-led consumer products

One third of the world's luxury items are made in Italy. This fashion and textile sector has:

- an estimated value of EUR €52.5 billion (2014)
- one of the highest purchase rates of fashion items in the world
- high spend by foreign tourists
- global leading trade fairs

British fashion brands often consider Italy as a gateway to other foreign markets.

E-commerce grew by 17% in 2014. Online sales of fashion (clothing, shoes, accessories) increased by more than 25% during that year.

The cosmetics, perfume and toiletries sector in Italy:

- had EUR €9.4 billion turnover in 2014
- has the world's largest trade fair, Cosmoprof. See: [www.cosmoprof.com/?\\_ga=1.47019553.765318255.1456403345](http://www.cosmoprof.com/?_ga=1.47019553.765318255.1456403345)
- is growing in terms of natural and organic beauty products and artistic perfumery

Italy's furniture and interior design sector is made up of over 28,000 companies. It hosts the world's top exhibition in the furniture sector, Salone del Mobile in Milan. See: [www.salonemilano.it/en](http://www.salonemilano.it/en)

There are opportunities for UK companies to supply:

- materials and components
- product and service design
- innovative product and interior design solutions with environment-friendly features in the contract market

Contact: [milancommercialenquiries@fco.gov.uk](mailto:milancommercialenquiries@fco.gov.uk) for more details on luxury and consumer product opportunities.

*[Source: Department for International Trade (DIT) (Feb 2016)]*

## Marine and ports

The Italian marine sector:

- has a total turnover of EUR €2.5 billion
- grew by 2.1% in 2014 compared with 2013 with 3.1% registered for boat accessories
- featured increased use of boat leasing

Italy is the global leader in the production of super yachts with 40% of global orders. Italy's shipbuilding industry includes many other sub-sectors which offer good opportunities for UK suppliers.

A new government plan launched in July 2015 aims to strengthen ports and logistics competitiveness at a European and global level. This will result in a series of new investment and innovative projects offering potential business opportunities for UK companies.

Contact: milancommerciaLENQUIRIES@fco.gov.uk for more details on marine and ports opportunities.

*[Source: Department for International Trade (DIT) (Feb 2016)]*

#### Retail

Future shopping centre development in Italy can offer investment and export potential. There will also be high value opportunities for the supply of infrastructure and structural products.

New property development projects with retail centres include:

- Westfield Milan, in Segrate close to Milan Linate airport, which will be the largest shopping mall in Italy at 250,000 sqm when it opens between 2017 and 2018, and will include almost 400 shops, 50 restaurants and 14 multiplex cinemas (investment value EUR €1.3 billion)
- Scalo Milano opening in 2015 with 300 shops (value EUR €170 million)
- Arese Shopping Centre opening in 2016 with 200 shops (value EUR €700 million)
- Verona Porta Sud opening in 2016 with 125 shops (value EUR €200 million)
- Torino Outlet Village opening in 2015 with 90 shops
- San Pellegrino Outlet Village opening in 2016 with 45 shops

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#### Technology, innovation and smart cities

The total value of the smart cities market in Italy is EUR €1.15 billion. Recent research by the Internet of Things Observatory of Milan Polytechnic indicates smart cars, smart homes and smart cities are expected to grow their business during 2015-16.

The city of Milan is supporting and promoting shared economy and social innovation initiatives. This includes the re-design of urban spaces and an easier access to information and institutional open data.

There are opportunities for:

- energy efficiency in buildings
- efficient public lighting
- waste management
- smart grid systems

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*[Source: Department for International Trade (DIT) (Feb 2016)]*

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