

# "Fasteners Meetaly 2015 – Challenge the Future"

## World Fasteners Overcome the Crisis

by courtesy of UPIVEB and Marco A. Guerritore (Editor in Chief of "Italian Fasteners")

Over five-hundred delegates from many countries of the world crowded into the conference room of Hotel ATA, located in the neighbourhood of EXPO 2015, where on Monday, September 14, 2015 the First World Convention focused on Fasteners was held. The event was promoted by UPIVEB (the Italian Association of Fastener Manufacturers), with the sponsorship of Carlo Salvi SpA, Editoriale UPIVEB, NOF Metal Coatings Group, Ori Martin, SACMA and Voestalpine, and the support granted by Banca Mediolanum and the Ministry of Economic Development. A real success, which has rewarded the commitment lavished by Sergio Pirovano, President of

UPIVEB and President of the company F.lli Pirovano SpA, who conceived and wanted that this important event were held during the period of EXPO 2015.

"For the first time in my life I have seen so many persons at the same time who are interested in the fastener industry – cried out Anders Karlsson, President of EIFI (European Industrial Fasteners Institute). This large participation of qualified professionals involved in our area of activity fills my heart with happiness and confidence in the future."

The fastener industry is an industrial sector with its specific dimension and characteristics. Though it is a less striking and eye-catching industry than that of consumer goods,

nonetheless it plays a very important and strategic role.

According to an estimate presented during the Conference by Enio Fontana – Managing Director at Fontana Luigi SpA and Vice-President of EIFI – in 2013 the global demand for fasteners totaled about 72.6 billion USD, divided (by geographical regions) into: APAC (Asia-Pacific) 30 billion USD, NAFTA (North America Free Trade Agreement) 16.5 billion USD, LATAM (Latin America) 3.3 billion USD, and EMEA (Europe, Middle East, and Africa) 22.8 billion USD. Forecasts concerning the next decade expect an average growth rate in the fastener industry all over the world

## 2015义大利扣件世界大会-挑战未来

### 全球扣件产业齐心协力克服危机

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恰逢2015米兰世博会期间,2015年9月14日(周一)在米兰ATA酒店会议厅举办的第一届「扣件世界大会」涌进来自全球各国500多位贵宾,现场冠盖云集。此次盛会由义大利扣件制造商协会(UPIVEB)举办,并受到Carlo Salvi SpA、Editoriale UPIVEB、NOF Metal Coatings Group、Ori Martin、SACMA及Voestalpine、Banca Mediolanum和义大利经济发展部等知名企业、单位暨组织赞助支持。在UPIVEB理事长兼F.lli Pirovano SpA总经理Sergio Pirovano的慷慨支持下,这次在世博会期间举办的重要盛会相当成功圆满。

欧洲工业扣件协会理事长Anders Karlsson表示:「这是我生平首次在同一时间看到这么多对扣件产业有兴趣的人汇聚一堂。这么多够资格的专业人士大量参与





by +6.3%. Obviously, this growth will be different in the various regions, as it will be greater in the Asian area and more limited in the American area. According to the analysis reported by Enio Fontana, the global demand for fasteners should reach in 2023 an amount of 140 billion USD. "Therefore, we expect a rosy future for the fastener industry - Enio Fontana said at the end of his report. The world market continues to grow, even if at a slightly slower pace than in the past."

This optimistic view for the future was also shared by Ennio Doris, President of Banca Mediolanum SpA, as regards the financial aspects. "If we consider the trend of the world GDP, we can see that it is continuously growing over time, ranging from 4.5 to 5% in the most favourable cases, and from 3 to 3.9% in the less favourable ones. Negative years are now very rare."

The state of health of the fastener industry

is undoubtedly strictly associated to the automotive industry trend, as Peter Weiss, in charge of the FCA Group Management, underlined. The automotive industry is undergoing some important changes, in terms of concept and product functionality, which are imposed by the ever-increasing and pressing constraints imposed by the current protection of the environment standards. "Motors are becoming more and more technological with reduced fuel consumption - Andrew Brumley, Chief Engineer FoE Engine Programs, Global Engine Engineering, Ford Motor Company, said. We are trying to build a light motor capable to use a wider range of fuels. We are also considering an electric motor for cars, but there are still many difficulties to overcome, such as a sufficient battery operating time, and a widespread distribution of energy refueling points".

But if a theoretical

业界活动让我对未来感到快乐和充满信心。」

扣件领域是一个有特定重要性和特色的产业类别。虽然比其他消费性商品领域，它显得较不吸引目光，但它仍然扮演非常重要和策略性的角色。

根据Fontana Luigi SpA总经理兼EIFI副理事长Enio Fontana在会议中的估计，2013年全球扣件需求总计726亿美元，以地域看分别为：亚太300亿美元、北美自由贸易协定区165亿美元、拉美33亿美元和欧洲/中东和非洲228亿美元。接下来10年根据预测，全球扣件产业平均成长率将达6.3%。很明显地，该成长因地而异，亚洲区会成长较多，美洲地区则相对受限。根据Enio Fontana的分析，全球扣件需求至2023年将达到1,400亿美元。Enio Fontana在报告结束时表示：「因为这些因素，我们预计扣件业未来会绽放出更美丽的花朵。目前全球市场持续增长，虽然比之前脚步稍稍慢了。」

在金融层面，Banca Mediolanum SpA总经理Ennio Doris也对未来抱持乐观看法。他表示：「如果我们考量到全球国内生产总值趋势，可以发现它一直在成长，在发展最顺利的领域部份成长从4.5至5%，次要发展最顺利的领域部份成

长从3至3.9%。目前几乎看不到悲观情况。」

FCA Group Management的Peter Weiss强调，扣件产业的健全状态毫无疑问与汽车产业的发展趋势紧密相关。谈到最近因越来越多环境保护标准所产生的压力而衍生出的概念和产品功能，汽车产业正在经历重要转变。福特汽车全球引擎工程FoE引擎计画总工程师Andrew Brumley表示：「汽车越来越朝向消耗更少燃料的高科技来发展。我们正尝试打造一款可以使用各种燃料的轻量汽车。也考虑电动车，但仍有许多困难须克服，例如要有足够的电池运作时间和更广泛设置的能源补充站。」

但若汽车产业中电动车理论的成功表示扣件产业将遭遇巨大损失，新的应用领域似乎为这项产品开启另一个可能，例如结构建筑领域。波隆纳大学结构建筑教授Massimo Majowiecki在他的报告中阐述直至昨天(9/13)为止尚被认为不可能的全新规划和设计法，这多亏了规划式科学和电脑的辅助，让他可以打造出扣件可以扮演领导性角色的惊人结构。

扣件生产领域中最关键的部份之一是生产中有自动化控制的组织环境，提供各种应用可能性。Bosch副总



success of electric motors in the automotive industry would mean great losses for the fastener industry, new horizons seem to be opening for these products, for example the area of structural architecture. In his report, Massimo Majowiecki, Professor of Structural Architecture at the University of Bologna, illustrated new planning and design methods that were inconceivable until yesterday, which thanks to the developments underwent by planning science and the aid of computers, allows to build incredible structures in which fasteners play a leading role.

One of the most critical aspects in the field of fastener production is the organizational setting of production with a predominance of automation, which provides for the spreading and application of electronics carried out through a variety of processors

with different application possibilities. Bernhard Gehlert, Vice President at Bosch, underlined the importance of electronics not only in our everyday life, but also and above all, in what the ever-evolving production philosophy of the future will be.

At the end of the reports, a round table was opened, in which the debate focused in particular on the situation of the Chinese market, where the current state of crisis should predictably weaken over time. Thus, China is supposed to restart its way to growth even if in more restrained terms. Egidio Stefano Brugola (President, Brugola OEB SpA), Ramon Ceravalls (President, EIFI General Fasteners Group, and Vice-President, ASEFI – Spanish Association of Metal Fastener Manufacturers), Ming-Jou Chen (Former President TIFI, Taiwan Industrial Fastener Institute), Dan Di Sebastian (Vice –

President, North America Operations, Fontana Group AGT), Anders Karlsson (President, EIFI), Fernando A. Gomes Martins (Vice-President, SINPA, Brazilian Fastener Institute), and Paolo Pozzi (President, EIFI Automotive Group, and CEO, Agrati Group) gave their contribution to the round table.

The aim of the Convention promoted by UPIVEB, was to analyze, at a global level, the possible future for fasteners through a variety of themes of interest and spur for all participants.

The Convention laid down the guidelines for an in-depth analysis of the strategies aimed at developing the fastener industry that should be put into effect in the forthcoming years.

Bernhard Gehlert强调电子应用不只在我们日常生活中很重要，在未来持续改革的生产哲学中也很重要。

在所有报告结束后，另外还有一场圆桌讨论会，特别针对中国市场的状况进行辩论，该市场目前的危机预计会随时间淡去。因此，中国严格来看应该可以重启成长之路。Egidio Stefano Brugola (Brugola OEB SpA 总经理)、Ramon Ceravalls (EIFI通用扣件小组总经理兼西班牙金属扣件制造商协会(ASEFI)副理事长)、Dan Di Sebastian (Fontana Group AGT 北美营运事务副总)、Anders Karlsson (EIFI理事长)、Fernando A. Gomes Martins (巴西扣件协会副理事长) 和 Paolo Pozzi (EIFI汽车小组总经理兼Agrati集团执行长) 都在圆桌讨论会提出自己的看法。

这次由UPIVEB主办扣件世界大会的目的是，站在全球的角度且透过众多参与者感兴趣的课题，来分析扣件领域的未来可能性。

这次大会为接下来几年扣件产业发展的策略进行深度剖析，并奠定指导方针。



As President Sergio Pirovano pointed out, UPIVEB is a reality that may seem small in terms of size, but is nonetheless provided with great proactive power. The Italian fastener industry includes 230 large, medium, and small manufacturing companies, which are all highly specialized and employ over 7,500 persons, with an overall yearly sales volume of approximately 2,300 million Euros.

如同Sergio Pirovano理事长指出，UPIVEB协会规模虽小，但却提供相当具有前瞻性的力量。义大利扣件产业包括230家大中小制造厂，具有高度专业性，聘雇超过7,500名员工，整体年度销售量约达23亿欧元。

## The Speakers 演讲来宾



- Silvia Vianello, Professor at SDA Bocconi
- SDA Bocconi商学院教授Silvia Vianello



- Massimo Majowiecki, Professor of Structural Architecture, University of Bologna
- 波隆纳大学结构建筑教授 Massimo Majowiecki



- Sergio Pirovano, President of F.lli Pirovano S.p.A and UPIVEB
- F.lli Pirovano S.p.A 总经理兼UPIVEB理事长 Sergio Pirovano



- Cav. Lav. Ennio Doris, President of Banca Mediolanum S.p.A.
- Banca Mediolanum S.p.A.总经理Cav. Lav. Ennio Doris



- Peter Weiss, Head of Emea Supply Chain Management & Cross-Region Supply Chain Coordinator of FCA Group.
- Emea供应链管理公司主管兼FCA集团跨域供应链协调员Peter Weiss



- Michele Rossi, Product Marketing Manager at New Holland Agriculture
- 新荷兰农业公司产品行销经理Michele Rossi



- Andrew Brumley, Chief Engineer FoE Engine Programs, Global Engine Engineering, Ford Motor Company
- 福特汽车全球引擎工程FoE引擎计画主工程师Andrew Brumley



- Bernhard Gehlert, Bosch Vice President
- Bosch副总Bernhard Gehlert



- Andrea Marinori, Partner - Roland Berger Strategy Consultants
- Roland Berger 策略顾问公司合伙人 Andrea Marinori



- Paolo Pozzi, Managing Director of Agrati Group
- Agrati集团总经理Paolo Pozzi



- Enio Fontana, Managing Director of Fontana Luigi Spa and Fontana Finanziaria Spa and Vice President of EIFI
- Fontana Luigi Spa总经理兼EIFI副主席 Enio Fontana

