

Supply chain: Italy's **GLASS GROUP** examines future challenges and opportunities

Market trends, projections and future scenarios as well as new technologies and solutions - these were just some of the talking points on the agenda at the recent **GLASS GROUP** Spring Meeting, organised in collaboration with Forel Spa.

The large Glass Group network met at Forel Spa in Vallio di Roncade (TV) on 25 and 26 May for the usual annual appointment with the balance books. Such is the driving reason behind the Spring Meeting, which marks an annual opportunity for the group to take stock of the past year, but also to reflect on current trends as it seeks to make projections concerning potential market developments. As infrastructure that holds an entire supply chain together, Glass Group is a one-stop shop that aims to generate dialogue opportunities and knowledge exchange, as well as sharing of know-how and information. Here industrial alliances are the workhorse of this group, which is also a promoter of dialogue among organisations that are also interdependent.

Besides the leaders of the flat glass supply chain, representatives of ANCE (Associazione Nazionale dei Costruttori Edili), the or-

ganisation that promotes innovative interventions for decarbonising real estate assets also took part in the two-day event. For the flat glass transformation supply chain, representatives of factories, transformers, manufacturers of industrial components and plant manufacturers also participated - all represented by Gimav and Forel, which hosted the events as co-organiser. Representing glass recycling, Eurovetro too was present - being the next to organise the 2024 meeting.

This Spring Meeting was opened with a welcome greeting at Forel by Fortunato, following which Riccardo Vianello kicked off the roundtable entitled 'Glass and Construction: trends and future developments.' Journalist Adriano Baffelli served as moderator for speeches delivered by coordinator of the Assovetro and Unicmi Observatory Carmine Garzia, Glass Group President Daniele Predari, ANCE Vice President Mas-

simo Angelo Deldossi, Edera founder Thomas Miorin and Cuoia Business School professor Maurizio Castro.

THE CONFERENCE

Carmine Garzia was tasked with presenting the data of the two Observatories, which sees the market decelerating in 2023 after a record 2022 which saw growth in the Construction industry



at around 19 percent. However, the analysis confirms a positive trend that estimates +9.4 percent for this year and +7.1 percent for next year. In the two-year period 23-24, a growth in investments of over EUR 16 billion in residential construction and around 10 billion in non-residential construction is expected - all significant figures considering that they indicate the net of potential incentives. Also, for the residential renovation sector, which recorded 20 percent growth over 2022, around +10 percent is expected in 2023 and +6 percent in 2024, while for infrastructure renewal a +9 percent is expected in 2023 and +6 percent in 2024.

Daniele Predari, who collaborated with Carmine Garzia on the Observatory data, confirmed a decelerating trend for processing companies in the first few months of the year, in terms of quantities produced - all owing to a sharp realignment of the supply chain 'lead-time' and mainly triggered by a greater availability of raw materials, which is leading to a contraction in raw materials prices for glass after the peaks of October 2022.

This perception has prompted customers to lower warehouse stocks, which have never been so high: postponing orders as they await better quotations. Orders for window and door manufacturers are comforting - being mostly covered for this year and the first months of 2024. This phase is a harbinger of

new imbalances on the market, which is leading processing companies into a strong conflict scenario. That, in turn, is restarting the race to reduce prices which, for so long, has forced many of the processing companies into very low profitability in order to decelerate both growth and innovation in comparison with other sectors. The hope, by the work of the Glass Group, is to successfully transfer to companies of the group (but also external ones) a greater awareness of the fundamental role that processing glassworks play within the supply chain. Here the rigidity characterising the production of flat glass becomes a natural barrier to strong changes in terms of supply on both the domestic and import markets. Essential is to recognise the scenarios into which one has fallen, have transparent information about the market trend, know the customers and finally get a preview of major projects that will invest in the construction market over the years ahead. Only by knowing the data and investigating scenarios can correct strategies be developed - all aimed at the growth and prosperity of companies.

Indeed it was precisely on the basis of such reflections that subsequent operations were adopted. The bridge with ANCE, represented by Vice-President Massimo Angelo Deldossi, serves to open a dialogue between operators within the same sector and create the conditions for mu-



tual growth - considering the challenges concerning companies transversally throughout the entire construction chain, and with sustainability always top of mind.

But the sites were also set on the future and on the European Union's programmes related to the decarbonisation of real estate assets. Highlighting the great opportunities offered by the decarbonization process, Thomas Miorin, founder of Edera (which is promoting Energiesprong in Italy), spoke of how this concerns the construction sector nationwide. Here too the figures are important, as are the challenges that accompany them: first of all, operational innovation with the creation of more effective models to respond to time limits imposed both by Europe but also increasingly by requests of the market.

The morning session concluded with an outstanding talk by Maurizio Castro, professor at CUOA Business School, whose long managerial career has seen him at the head of such titans as Electrolux and Zanussi as well as such large private entities as INAIL. Both post-globalization economic scenarios and industrial alliances were the key themes he covered. In an economy set to be dominated by uncertain scenarios -here we're talking systemic industrial 'permacrisis' in Italy- the winning formula will be dimensional growth, either through industrial alliances

or increasingly successful external growth. Here, according to Maurizio Castro, it is Glass Group that can serve as a model of inspiration for the Italian system as an aggregation project that's based on industrial alliances and supply chain collaborations - all aimed at overcoming fragmentation to best dominate the evolution that's taking place.

VITRUM 2023

The afternoon session opened with another strategic collaboration that has for some time now seen Glass Group and Gimav, the organisation of glass processing plant manufacturers, flanking each other to promote the supply chain. Here, among the many opportunities for synergy, the most important is undoubtedly that of Vitrum, the industry's international trade fair. Vitrum CEO Fabrizio Cattaneo and Sales Manager Giada Isella took the opportunity of the Glass Group meeting to present the 2023 edition - which will be hosted in Milan from 5 to 8 September. The session dedicated to Vitrum included a talk by Glass Group Design Manager Ascanio Zocchi, who collaborated in designing the exhibition spaces, as well as Riccardo Vianello, who holds the Vice Presidency of both Vitrum and Forel Spa. Certainly Vianello well understood the promo opportunity in communicating to meeting guests the need to remain in lockstep with Italian en-

trepreneurial culture while abandoning any individualistic vision to instead move towards common strategic objectives and an idea of 'country system' which must already find fertile ground among industry leaders.

EXPERIMENTAL GLASS STATION

The second appointment of the afternoon schedule saw an Experimental Glass Station talk by Nicola Favaro, director of its laboratories, who spoke on 'UNI Certification: a tool for developing and growing the insulating glass processing and production industry.' Here the objective of the Experimental Glass Station was to promote a fresh institutional approach respecting UNI certification, firstly by fostering a relationship of greater collaboration with transformation companies and secondly by encouraging UNI adoption, through certification-related communication and valorisation, on the part of more insulating glass manufacturers.

ROOM FOR PARTNERS

The Spring Meeting was also an opportunity to enhance the group's partnerships through specific moments dedicated to Glass Group partners. New Glass Group Technical Partner Eurovetro of Origgio (VA) is a company that operates in glass recycling - performing the task of transforming the waste it collects from com-

panies into a raw material that the glass industry can use to produce new products. Sales Manager Massimo Tamagno presented the company and its services dedicated to Glass Group, going on to invite all guests present to the 2024 edition of the Spring Meeting which will take place in the company's new glass recycling plant in Friuli.

MAIN PARTNERS: FENZI, FOREL, PELLINI AND TECHNOFORM

ScreenLine division Sales Manager for Italy Giorgio Lesanti then represented Pellini SpA, introducing the group and its new industrial projects. Production sites, group companies and the new solutions studied by its internal R&D department were all described, as was Wise, the accessories ecosystem for remotely or locally controlling motorised ScreenLine double-glazing screens.

The last part of the meeting was hosted within the Forel production area, reserving an exclusive visit to production areas and new plants for all attendees.

Two islands reserved for Fenzi and Technoform were created within the Forel production spaces for setting up two technical laboratories. Using systems made available by Forel, new solutions were then presented for application in the production of insulating glass units.

TECHNOFORM: GLASS-EDGE INNOVATIVE SOLUTIONS

The Technoform laboratory was created by:

- Chiara Grisanti, Design & Development Engineer
- Mauro Lardini, Market Development Manager
- Marco Manzella, Product Manager Italian Market
- Fabiola Renzi, Italian Market Team Manager

During the laboratory, the Technoform experts demonstrated the application in detail, going through workability, technical characteristics and certifications of all available solutions - with both practical cases and concrete demonstrations.

Current solutions were among those presented, namely SP14 the standard solution with a warm edge, SP18 the high stability spacer, SP16 the solution that offers the highest thermal performance. Great news too: solutions that respond specifically to climatic (SP27 and SP28) and thermal

(SP24) loads, spacers that combine the highest thermal performance with such excellent workability and productivity as is typical of cold bending.

BUTYLVER TPS: AUTOMATION AND EFFICIENCY FOR HIGH- PERFORMANCE INSULATING GLASS UNITS OF MAXIMUM DURABILITY

The Fenzi Laboratory was created by:

- Laura Casarin, Sealants R&D Manager
- Matteo Padovan Managing Director

This laboratory presented live demonstrations of the automated application of Fenzi's innovative warm edge thermoplastic profile, Butylver TPS, using Forel technology. Here our key Italian players in the glass industry gathered in the Glass Group were able to appreciate the advantages that Butylver TPS offers to insulating glass manufacturers: production simplified to

maximum automation for the creation of double, triple and even quadruple insulating glass units optimum in every detail, with high energy efficiency and maximum durability over time.

All the main partners underscored the importance of a supply chain collaboration that could allow for a shortening of distances while creating the conditions to study new solutions for testing within the group and then subsequent transferral to the market.

CONCLUDING ITEMS

Internal discussions were held on the second day of the meeting between companies of the group during which market trends and potential strategies were examined. New Glass Group projects were also presented - set to be launched during the second half of the year. Of these the first, from the Glass Group Observatory, is

dedicated to:

- Demand analysis
Analysis of the purchasing process and trends in the flat glass sector

- Supply analysis
Observatory on the performance of processing companies. Comparative analysis of performance and assessment of the economic sustainability of growth.

The talk by Glass Group technical partner Omnidecor was held at the end of the meeting with a presentation of the company and its range of products to all companies present.

GLASS GROUP



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