



Ministero degli Affari Esteri  
e della Cooperazione Internazionale



# ACTION PLAN FOR ITALIAN EXPORTS

## TO HIGH-POTENTIAL EXTRA-EU MARKETS

TARGET  
700 billion €



*in collaboration with*





Ministero degli Affari Esteri  
e della Cooperazione Internazionale





## EXPORTS: A PRIORITY OF THE ITALIAN GOVERNMENT

**Italy is a global export powerhouse, accounting for 40% of its GDP. We rank as the 6th largest exporter in the world. Italy is the second-largest economy globally and the first in Europe in terms of the diversification of exported goods.**

We operate in practically every sector. In 2024, Italian exports reached €623.5 billion, experiencing a slight decline in value (-0.4%) due to a moderate contraction in the EU area, counterbalanced by **record exports to non-EU countries, totaling €305.4 billion (+1.2%).**



Italy witnessed a significant increase in the trade surplus, reaching €54.9 billion (+61%), driven by the reduction in imports and the decrease in the energy deficit. The goal is to reach **€700 billion in exports** by the end of the legislative term. To achieve this, we have developed an **Action Plan to accelerate exports through an integrated promotion strategy involving various key players within the "Sistema Italia", focusing on high-potential markets and leading sectors of "Made in Italy".**

**Italy seeks dialogue with all global partners and aims to be the key EU ambassador in its relations with the United States**, which accounts for almost 11% of our exports. **It is crucial to find common ground and avoid a "trade war" that would be detrimental to both the United States and Europe. The Italian Government can act as a bridge**, fostering open and constructive dialogue across the Atlantic and serving as Europe's representative to the U.S. administration. We must insist on dialogue and explore mutual concessions without falling into a cycle of retaliatory measures.

### STRATEGY WITH EUROPE

Key targets include: **strengthening the European market** and its competitiveness through significant bureaucratic streamlining and an **industrial policy** that lowers production and energy costs; encouraging private investment by completing the Capital Markets Union; developing a revitalization strategy for the EU, also by promoting a proactive role for the European Central Bank; **increasing defense spending**, also by reinforcing industrial cooperation with the U.S. by purchasing American military products without dogmatism; urging the European Commission to **expand the network of free trade agreements**, which offer valuable **opportunities to diversify** Italian exports.





## **STRATEGY WITH THE UNITED STATES**

Italy enjoys a trade surplus of **€38.8 billion** with the United States. Given the U.S. administration's announcement of tariffs, it is imperative to further **strengthen economic ties with the US**, also to rebalance the trade surplus. A "transactional strategy" could include agreements on natural gas (LNG) and defense procurement. **It is crucial to maintain the presence of Italian businesses in the U.S. market** since exiting would entail significant re-entry costs. Moreover, strengthening our entrepreneurial footprint in the U.S. could help **mitigate the impact of American tariffs** on Italian exports. Together with European partners, Italy should respond to U.S. tariffs in close coordination with the European Commission and Trade Commissioner Šefčovič, ensuring a proportional and non-escalatory reaction, leveraging the tools available within the EU, and seeking every possible opportunity for constructive dialogue. We can also explore **potential opportunities arising from the dollar's performance** and from the precautionary stockpiling of Italian goods by U.S. companies. Additionally, **high U.S. tariffs on other global regions could create competitive advantages for Made in Italy products**.

## **A COMPREHENSIVE STRATEGY TO STRENGTHEN ITALIAN EXPORTS WORLDWIDE**

Providing comprehensive support for Italian exports is a **top foreign policy priority for this Government**. Growth in exports can be achieved by **boosting production**, primarily through **reducing energy costs** and expanding into high-potential markets. The scope is to accelerate the penetration of Italian exports into high-growth markets, while simultaneously **support exports also in traditional markets, with a particular focus on Germany** – Italy's primary trading partner – alongside with the recovery of its economy. Among the most promising emerging markets for Italian exports are: **India, Mexico, Brazil (and more broadly, Mercosur and Latin America), Türkiye, the UAE, Saudi Arabia (and the Gulf countries), ASEAN nations (especially Thailand, Vietnam, Indonesia, and the Philippines), certain African nations (notably South Africa and Algeria), the Western Balkans (especially Serbia), and Central Asia**.

In many of these countries, **negotiations** for new or updated free trade agreements with the EU are ongoing or have been finalized on a technical level.

Several industrialized nations also present high-untapped potential, including the **United Kingdom, Switzerland, Japan, and Canada**.

All Italian Embassies are actively working on the release of **Country Guides under the "Diplomazia della Crescita" (Growth Diplomacy) initiative**.





## **EXPORT OUTLOOK FOR 2024: GENERAL TRENDS & HIGH-POTENTIAL MARKETS**

In non-EU markets, **high potential** emerging countries include: Türkiye (€17.6 billion, +23.9%), UAE (€7.9 billion, +19.4%), Mexico (€6.6 billion, +7.4%), Saudi Arabia (€6.2 billion, +27.9%), Brazil (€5.8 billion, +8.1%), India (€5.2 billion, +1%), Algeria (€2.9 billion, +2.7%), South Africa (€2.2 billion, -0.6%), ASEAN countries (€10.7 billion, +10.3%), Vietnam (€1.5 billion, +25.8%), Indonesia (€1.2 billion, -9.9%), Philippines (€0.9 billion, +10.4%), Western Balkans (€6.5 billion, +13.4%), Serbia (€2.7 billion, +17.4%), and Central Asia (€2.16 billion, +11.3%).

## **EXPORT PROMOTION TOOLS**

The Action Plan was developed through constant dialogue with the private sector, particularly with **business associations, the network of the Italian Chambers of Commerce and large publicly-owned enterprises**, like Poste Italiane. Its implementation will be accompanied by close collaboration with the financial sector, particularly Borsa Italiana, with the aim of promoting small and medium-sized enterprises." **It integrates various promotion tools available to the "Sistema Italia"**, including some innovative mechanisms. In particular: the Ministry of Foreign Affairs and International Cooperation has activated SIMEST-managed measures to support export growth in strategic geographic areas, including new configurations of Funds 394/81 and 295/73 to financially support infrastructure projects, **energy-intensive businesses, and SME growth**. The **Italian Trade Agency** will implement "OpportunItalia", a plan to generate commercial leads for Italian companies across 20 key markets. **SACE will enhance its push strategy to open new business opportunities. CDP (Cassa Depositi e Prestiti) will intensify its efforts to facilitate access to international markets for Italian operators** through export credit tools and targeted business-matching actions. With this comprehensive plan, we aim to further strengthen Italian exports worldwide and enhance the global presence of Made in Italy.

**ANTONIO TAJANI**  
**VICE-PRESIDENT OF THE COUNCIL OF MINISTERS**  
**AND MINISTER OF FOREIGN AFFAIRS AND**  
**INTERNATIONAL COOPERATION**





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## THE OVERALL FRAMEWORK

This **Action Plan** is designed to further promote Italian exports of the key sectors of Made in Italy in high-potential international markets. The Ministry of Foreign Affairs and International Cooperation has adopted it, in coordination with the agencies of the “sistema italia” and organizations representing the business community, with the goal of reaching €700 billion in exports by the end of the legislative term.

The **Diplomazia della Crescita (Growth Diplomacy)**, a comprehensive support for Italian exports, is a top foreign policy priority of the Government. The Export Action Plan is part of a broader European and international policy strategy.

**Emerging markets and geographical areas with high development potential** have been identified. These include (in order of Italian exports): Türkiye, China, United Arab Emirates, Mexico, Saudi Arabia, Brazil, India, ASEAN countries (particularly Thailand, Vietnam, and Indonesia), African nations (including Algeria), the Western Balkans (particularly Serbia), and Latin American countries. Additionally, **high-potential mature non-EU markets** include: the United States, Switzerland, the United Kingdom, Japan, and Canada.

The Action Plan **integrates several promotion tools available to MAECI, ITA, SIMEST, SACE, and CDP**, some of which are innovative in nature. This is a dynamic document that can be expanded and enriched through continuous dialogue between institutions and businesses to seize every opportunity offered by international markets.

In the next sections, the Action Plan outlines key actions for the countries listed above, along with **summary tables** that cross-reference target countries and key Italian export sectors, as well as **detailed sheets** on the operational tools provided by the Plan.





# HIGH-POTENTIAL EXTRA-EU MARKETS

## EMERGING MARKETS

- TÜRKIYE
- CHINA
- UNITED ARAB EMIRATES
- MEXICO
- SAUDI ARABIA
- BRAZIL
- INDIA
- ALGERIA
- SOUTH AFRICA

## REGIONS :

- ASEAN
- WESTERN BALKANS
- AFRICA
- LATIN AMERICA
- CENTRAL ASIA

## MATURE MARKETS

- UNITED STATES  
OF AMERICA
- SWITZERLAND
- UNITED KINGDOM
- JAPAN
- CANADA

## TOOLS FOR THE IMPLEMENTATION OF THE ACTION PLAN







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# EMERGING MARKETS





### ITALIAN EXPORT POSITIONING

TÜRKIYE

**10<sup>th</sup>** EXPORT  
DESTINATION  
MARKET FOR  
ITALIAN EXPORTS



**2,8 %**  
OF TOTAL  
EXPORTS OF  
ITALY

**17,6** bn €

**ITALIAN EXPORT 2024**

**+23,9%** compared to 2023

### MAIN SECTORS OF ITALIAN EXPORTS

**1** OTHER  
MANUFACTURING  
ACTIVITIES  
**32,9%**

**2** MACHINERY AND  
MECHANICS  
**18,1%**

**3** TRANSPORT  
SECTOR  
**10,1%**

**4** BASE AND  
PRODUCED  
METALS  
**7,4%**

**5** CHEMICAL  
PRODUCTS  
**6,9%**

**6** TEXTILES AND  
CLOTHING  
**6,4%**

% of total export in the country

#### PRIORITY SECTORS

- Advanced mechanics
- Infrastructures
- Digital Technologies
- Defense
- Luxury

### ACTIONS

- ✓ **Rome, April 29, 2025 - Entrepreneurial Forum Italy-Türkiye**
- **Trade fairs, business missions, large-scale organized retail agreements, and e-commerce** for €700,000 and **incoming operators (ITA)**
- **ITA business matching, OpportunItalia Program, CDP Platform**
- **Export and internationalization credits** and finance for development by **CDP**; (€30 million loan granted to QNB Leasing for SMEs ✓)
- **Export Credit** and **internationalization** support and **SACE business matching** initiatives in the infrastructure and utilities sectors and promotional initiatives in the Italian supply chain for components, logistics, handling, and packaging
- **Facilitated finance, Investment Line, Equity** and **Export Credit** from **SIMEST**

# CHINA

A MARKET OF 1.4 BILLION CONSUMERS



## ITALIAN EXPORT POSITIONING

### CHINA

**11<sup>th</sup>** EXPORT MARKET  
FOR ITALIAN GOODS



**2,5 %**  
OF TOTAL  
EXPORTS OF  
ITALY



**2** SUPPLIER OF  
ITALY

**15,3** bn €

ITALIAN EXPORT 2024

**-20%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

TEXTILES AND  
CLOTHING

**26,4%**

**2**

MACHINERY AND  
MECHANICS

**23,3%**

**3**

PHARMACEUTICALS AND  
CHEMICALS

**13,8%**

**4**

OTHER  
MANUFACTURING  
ACTIVITIES

**6,0%**

**5**

TRANSPORT  
SECTOR

**5,7%**

### PRIORITY SECTORS

- High-quality goods
- Agri-food and wine
- Fashion
- Pharmaceuticals and biomedical
- Cosmetics
- Mechanics

% of total export in the country

## ACTIONS

- ✓ **2024-2027 Action Plan** for Strengthening the Global Strategic Partnership between Italy and China, adopted in July 2024 by the two Heads of Government
- ✓ **Rome, October 8, 2025 - Economic Table of the Italy-China Intergovernmental Committee**
- **Joint Economic Commission**, meeting of the Italy-China Business Forum co-chaired by **CDP** – dates to be defined
- **Fairs, Business Missions, large-scale organized retail and E-commerce agreements** for €9,300,000 and incoming operators (**ITA**)
- **ITA Business Matching, Opportunitalia** Program, and **CDP Platform**
- **Export and internationalization credits** from **CDP**
- **Facilitated finance, investment line, Equity and Export Credit** from **SIMEST**
- **Export Credit** and **internationalization** support from **SACE**. **Push Strategy** and **Business Matching** initiatives from **SACE** with a focus on **machinery**

# UNITED ARAB EMIRATES

KEY DESTINATION FOR TECHNOLOGY AND LUXURY

## ITALIAN EXPORT POSITIONING

U.A.E.



MARKET  
DESTINATION FOR  
ITALIAN EXPORT IN  
THE **MENA AREA**



**19,7 %**  
OF TOTAL  
EXPORTS IN  
THE **MENA**  
**AREA**



**7,9** bn €  
**ITALIAN EXPORT 2024**  
**+19,4%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

**MANUFACTURING  
PRODUCTS**  
**22,1%**

**2**

**MACHINERY AND  
MECHANICS**  
**18,2%**

**3**

**TEXTILES AND  
CLOTHING**  
**15,5%**

**4**

**BASE AND  
PRODUCED METALS**  
**7,2%**

**5**

**CHEMICALS**  
**7,1%**



### PRIORITY SECTORS

- **Green technologies**
- **Agri-food**
- **Luxury**
- **Defense**

% of total export in the country

## ACTIONS

- ✓ **Rome, February 24, 2025 – Business Forum**, focus on infrastructure, energy, defense, and space
- **Fairs, Business Missions, large-scale organized retail and E-commerce agreements** for €6,800,000 and incoming operators (ITA)
- **ITA business matching, OpportunItalia Program, and CDP Platform**
- ✓ **CDP Agreement with Abu Dhabi Investment Office** to support collaboration between companies
- **Export and internationalization credits** from **CDP** and collaboration agreements with contractors and Emirati institutions (including ADIO) to facilitate access to the local market
- ✓ **Signing of 3 SACE agreements** for collaborations in renewable energy and water treatment sectors for €450,000,000
- **Business matching** initiatives in the **energy** sector and **export credit** and **internationalization** support from **SACE**
- Public fund for **Infrastructure** managed by **SIMEST** (€100 million); **Facilitated finance, Equity Line and Export Credit**



# MEXICO

A HUB FOR THE NORTH AMERICAN MARKET



## ITALIAN EXPORT POSITIONING

### MEXICO



**EXPORT  
DESTINATION  
MARKET FOR  
ITALIAN GOODS IN  
LATIN AMERICA**



**31,6 %**  
OF TOTAL EXPORTS  
IN  
**LATIN AMERICA**



**6,6** bn €  
**ITALIAN EXPORT 2024**  
**+7,4%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

**MACHINERY AND  
MECHANICS**

**35,5%**

**2**

**TRANSPORT  
SECTOR**

**14,9%**

**3**

**MANUFACTURING  
ACTIVITIES**

**8,4%**

**4**

**BASE METALS**

**8,4%**

**5**

**CHEMICALS**

**6,6%**

**6**

**TEXTILES**

**5,4%**

% of total export in the country

### PRIORITY SECTORS

- *Transport, automotive and sustainable mobility, infrastructure, and energy transition*
- *Agricultural machinery and agri-food processing*
- *Pharmaceuticals and biotech*

**Negotiation for the revision of the EU-Mexico Global Agreement**  
*great potential for new opportunities*

## ACTIONS

- ✓ **Mexico City, May 22-24, 2025 - System mission** led by the **VPoC/ Hon. Minister Tajani** and **Entrepreneurial Forum Italy-Mexico**
- **Fairs, Business Missions, large-scale organized retail and E-commerce agreements** for €1,300,000 and incoming operators (**ITA**)
- **ITA business matching**, Opportunità Italia Program, and **CDP Platform**
- **Export and internationalization credits** and Finance for development from **CDP**
- **SACE business matching** activities during fairs organized in Italy and Mexico and **Export Credit** and **internationalization** support
- ✓ **SIMEST**: implementation of a €500 million package of **Facilitated Finance** and **Export Credit** measures for Latin America; **Equity and Export Credit Line**

# SAUDI ARABIA

EXTRAORDINARY OPPORTUNITIES THANKS TO VISION 2030



## ITALIAN EXPORT POSITIONING

### SAUDI ARABIA



EXPORT  
DESTINATION  
MARKET FOR  
ITALIAN GOODS IN  
THE **MENA AREA**



**15,4 %**  
OF TOTAL  
EXPORTS IN THE  
**MENA AREA**



**6,2 bn €**  
**ITALIAN EXPORT 2024**  
**+27,9%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

**MACHINERY**

**35,6%**

**2**

**MEDICINE AND  
PHARMACEUTICALS**

**6,8%**

**3**

**OIL REFINING PRODUCTS**

**4,3%**

**4**

**STEEL PIPES AND  
FITTINGS**

**3%**



### PRIORITY SECTORS

- **Renewable energy**
- **Infrastructure**
- **Fashion and luxury**
- **Defense**
- **Pharmaceuticals**
- **Furniture/Home décor**

% of total export in the country

## ACTIONS

- ✓ **Riyadh, November 25, 2025 - System mission** led by the **VPoC/Hon. Minister Tajani** and **Sectoral Business Forum**
- ✓ **Riyadh, November 2025 - Joint statement** by **MAECI and Expo 2030 Riyadh Company** on the establishment of a task force with ICE, CDP, Simest and Sace to promote the **participation of Italian companies in Expo projects**
- **2034 FIFA World Cup**: opportunities for major urban development and infrastructure projects
- **Fairs, Business Missions, large-scale organized retail and E-commerce agreements** for €2,200,000 and incoming operators (**ITA**)
- **ITA business matching, Opportunitalia Program**, and upcoming launch of the **CDP Platform**
- **CDP export and internationalization credits** and collaboration with Saudi funds and contractors
- ✓ **SACE agreements** worth \$6.6 billion signed during the government mission in January 2025
- **SACE business matching** activities in the following sectors: infrastructure and transport, electrical, energy, and food; **Export Credit** and **internationalization** support
- **Infrastructure Fund** managed by **SIMEST** (€100 million); Facilitated finance, Equity and Export Credit Line
- ✓ opening of **SIMEST's representative office** in Riyadh - november 2025

# BRAZIL

THE GREAT OPPORTUNITY OF MERCOSUR



## ITALIAN EXPORT POSITIONING

### BRAZIL



EXPORT  
DESTINATION  
MARKET FOR  
ITALIAN GOODS IN  
LATIN AMERICA



**27,6 %**  
OF TOTAL EXPORTS  
IN **LATIN AMERICA**



**5,8** bn €  
**ITALIAN EXPORT 2024**  
**+8,1%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

1

**MACHINERY AND  
MECHANICS**  
**31,8%**

2

**TRANSPORT  
SECTOR**  
**14,8%**

3

**CHEMICALS**  
**9,5%**

4

**PHARMACEUTICS**  
**7,6%**

5

**BASE METALS**  
**7,3%**

5

**FOOD INDUSTRY**  
**5,7%**



### PRIORITY SECTORS

- **Automotive**
- **Agri-food**
- **Renewable energy**

% of total export in the country

**EU-MERCOSUR AGREEMENT**  
**Great potential for new opportunities**

## ACTIONS

- ✓ **São Paulo, October 9, 2024 – Business Forum chaired by the VPoC/Hon. Minister Tajani** – focus on agribusiness, infrastructure, energy, industrial machinery, extractive technologies, and water treatment
- Sectoral missions following the **Business Forum** in October 2024; focus on energy transition, industrial machinery, water treatment, and fashion
- **Fairs, Business Missions, large-scale organized retail and E-commerce agreements** for €2,700,000 and incoming operators (ITA)
- **ITA business matching, Opportunitalia Program, and CDP Platform**
- **CDP export and internationalization credits** and Finance for development (a loan of €250 million has been granted to Banco do Brasil ✓)
- Matchmaking events by **SACE** and **Banco do Brasil** for Italian and Brazilian companies
- **Business matching** initiatives from **SACE** in the renewable energy, electrical, and steel sectors.
- **Export Credit** and **internationalization** support from **SACE**
- ✓ **SIMEST**: implementation of a €500 million package of Facilitated Finance and Export Credit measures for Latin America; **Equity** and **Investment** Line; representative office in São Paulo

# INDIA

AN ECONOMY WITH ENORMOUS POTENTIAL



## ITALIAN EXPORT POSITIONING

INDIA

**4<sup>th</sup>** EXPORT MARKET FOR  
ITALIAN PRODUCTS  
IN **CENTRAL-  
EASTERN ASIA**



**9,2 %**  
OF ITALIAN  
EXPORT IN  
**CENTRAL-  
EASTERN ASIA**

**5,2** bn €  
**ITALIAN EXPORT 2024**  
**+1%** compared to 2023

Emerging market with great growth potential

## MAIN SECTORS OF ITALIAN EXPORTS

**1** | MACHINERY AND  
MECHANICS  
**40,2%**

**2** | CHEMICALS  
**11,5%**

**3** | COMPUTERS, ELECTRONIC  
AND ELECTRICAL DEVICES  
**10,3%**

**4** | BASE AND PRODUCED  
METALS  
**7,9%**

**5** | RUBBER AND PLASTIC  
PRODUCTS  
**4,8%**

### PRIORITY SECTORS

- Advanced mechanics
- Green technologies
- Consumer goods
- Infrastructure and mobility
- Space and defense

% of total export in the country

**FREE TRADE AGREEMENT BETWEEN THE EU AND INDIA**  
*ongoing negotiations*

## ACTIONS

- ✓ **Joint Action Plan 2025-2029** for the strengthening of the economic and industrial partnership, signed in November 2024 by the two Heads of Government
- ✓ **Mumbai, November 10-11, 2025 - Italy-India Business Forum** on the occasion of the **visit of the VPoC/Hon. Minister Tajani**
- ✓ **Brescia, June 5, 2025 - Italy-India Strategic Partnership, Joint Committee for Economic Cooperation and Italy-India Business Forum**, chaired by the **VPoC/ Hon. Minister Tajani**
- ✓ **New Delhi, April 10-11, 2025 - Italy-India Scientific and Technological Business Forum** on the occasion of the **visit of the VPoC/Hon. Minister Tajani**
- **Trade Fairs and Business Missions** worth €1.000.000 and **incoming operators (ITA)**
- **ITA Business matching, Opportunitalia** Program and **CDP Credit Platform**
- **CDP Export and internationalization credits** (first initiative of 2025 to support an M&A operation already finalized for €114 million in the automotive sector) and **Finance for the development**
- **SACE business matching** initiatives in the sectors: **renewable energy, steel industry, infrastructure and energy**; export credit and internationalization support
- ✓ **SIMEST: India Measure** (€500 million); **facilitated finance, Investment, Equity and Export Credit Line**; opening of a **representative office** - April 2025



# ALGERIA

STRATEGIC PARTNER FOR ENERGY AND INFRASTRUCTURE



## ITALIAN EXPORT POSITIONING

### ALGERIA

**5<sup>th</sup>** EXPORT MARKET  
FOR ITALIAN  
PRODUCTS IN THE  
MENA AREA



**7,2 %**  
OF ITALIAN  
EXPORT IN THE  
MENA AREA



**1** ENERGY SUPPLIER  
OF ITALY

**2,9** bn €

ITALIAN EXPORT 2024

**+2,7%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS



% of total export in the country

### PRIORITY SECTORS

- Machinery and industrial equipment
- Automotive
- Energy
- Chemicals and pharmaceuticals

## ACTIONS

- ✓ Rome, July 23, 2025 - Italy-Algeria Business Forum
- ✓ Algiers, 3 March 2025 - Roundtable between Italian and Algerian companies during the visit of the VPoC/Hon. Minister Tajani
- Opportunities offered by the **SouthH2 Corridor Project**
- **Trade fairs, business missions** for €500,000 and incoming operators (ITA)
- **CDP export and internationalization credits**
- ✓ **SIMEST**: implementation of a €200 million **Facilitated Finance** measure dedicated to Africa; **Investment Line, Equity and Export Credit**
- **Export Credit and internationalization** support by **SACE**

# SOUTH AFRICA

MAIN TRADING PARTNER IN SUB-SAHARAN AFRICA



## ITALIAN EXPORT POSITIONING

### SOUTH AFRICA



EXPORT MARKET FOR  
ITALIAN GOODS IN  
SUB-SAHARAN  
AFRICA



**36,6 %**

OF TOTAL EXPORT  
SUB-SAHARAN  
AFRICA

**2,2 bn €**

ITALIAN EXPORT 2024

**-0,6%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

MACHINERY

**20,5%**

**2**

PETROLEUM  
PRODUCTS

**14,9%**

**3**

JEWELRY

**8,4%**

**4**

CHEMICALS

**2,8%**

% of total export in the country

### PRIORITY SECTORS

- **Infrastructure and transportation**
- **Machinery**
- **Critical raw materials (CRMs)**

## ACTIONS

- ✓ Italy-Africa Business Dialogue Forum
- ✓ Regional Meeting in Cape Town
- Seizing the opportunities offered by the South African market to access to the **African Continental Free Trade Area (AFCFTA)**
- **Trade fairs, business missions** worth 300.000€ and incoming operators (ITA)
- **CDP export and internationalization credits** and Finance for development; **Collaboration agreements** with the South African Development Bank (DBSA) and **business matching** platform (CDP)
- ✓ **SIMEST**: implementation of a €200 million **Facilitated Finance** measure dedicated to Africa; **Investment Line, Equity and Export Credit**
- **Export Credit** and **internationalization** support by **SACE**



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# REGIONS



# ASEAN

## A FAST-GROWING REGION

### PRIORITY SECTORS

*Machinery, Renewable energy, Chemicals, Textiles, Agri-food*



10,7 bn €

ITALIAN EXPORT 2024

+10,3% compared to 2023



## THAILAND

2<sup>nd</sup> EXPORT MARKET FOR ITALIAN PRODUCTS IN THE ASEAN AREA

18,2%

of total export in the ASEAN area

Government investments in **digitalization** and **infrastructure** create opportunities in the high-tech and transportation sectors.

1,9 bn €  
EXPORT IT. 2024

+2,2% compared to 2023

### PRIORITY SECTORS

- Machinery and mechanics
- Textiles and clothing
- Electronics and optics
- Transport sector and componentry



## VIETNAM

4<sup>th</sup> EXPORT MARKET FOR ITALIAN PRODUCTS IN THE ASEAN AREA

14,4%

of total export in the ASEAN area

The **EU-Vietnam Free Trade Agreement (EVFTA)** creates opportunities for access to the local market

1,5 bn €  
EXPORT IT. 2024

+25,8% compared to 2023

### PRIORITY SECTORS

- Textiles and clothing
- Industrial machinery/equipment
- Renewable energy
- Chemicals and pharmaceuticals
- Food industry
- Infrastructure and mobility
- Defense



## INDONESIA

5<sup>th</sup> EXPORT MARKET FOR ITALIAN PRODUCTS IN THE ASEAN AREA

11,7%

of total export in the ASEAN area

1,2 bn €  
ITALIAN EXPORT 2024

-9,9% compared to 2023

### PRIORITY SECTORS

- Industrial machinery/equipment
- Renewable energy
- Chemicals and pharmaceuticals
- Textiles and fashion
- Agri-food

## ACTIONS

- ✓ Vietnam, 12-13 November 2025 - business missions on the occasion of the High Level Dialogue
- ✓ Hanoi, 3-4 September 2025 - Italy-Vietnam Strategic Economic Partnership Event
- ✓ Rome, 2 July 2025 - Malaysia - Italy Economic Partnership Roundtable Meeting, chaired by the VPoC/ Hon. Minister Tajani
- ✓ Milan, 4-7 May 2025 - Events promoting the economic partnership on the occasion of the Asian Development Bank Board of Governors
- Trade fairs, business missions, large-scale organized retail and e-commerce agreements worth €3,900,000 and incoming operators (ITA)
- ITA business matching, Opportunità Italia Program and CDP Platform
- CDP Credits for export and internationalization and Finance for development (with a focus on energy transition)
- ✓ Push Strategy and SACE business matching activities in the agri-food and energy sectors (the measure has already been implemented in Vietnam). SACE thematic session on sustainable infrastructure on the occasion of the ADB Annual Meeting in Milan; export credit and internationalization support
- Facilitated Finance, Investment, Equity and Export Credit lines managed by SIMEST



# WESTERN BALKANS

## AN AREA OF STRATEGIC IMPORTANCE

### PRIORITY SECTORS

- *Infrastructure and logistics networks (railways, highways, ports)*
- *Energy transition*



6,5 bn €

ITALIAN EXPORT 2024

**+13,4%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

1

TEXTILES/  
CLOTHING

**16,8%**

2

BASE AND PRODUCED  
METALS

**14%**

3

FOOD INDUSTRY

**13,7%**

4

MACHINERY

**13,2%**

5

RUBBER AND  
PLASTICS

**8,6%**

6

CHEMICALS

**8,2%**

% of total export in the area

## ACTIONS



**Skopje, July 2, 2025 - Italy-North Macedonia Business Forum**



**Belgrade, January 31, 2025 - Italy-Serbia Business Forum** chaired by the **VPoC/ Hon. Minister Tajani**



Possible technical-led sector missions in infrastructure, energy, and logistics



**Fairs, business missions** for €700,000, and incoming operators for Serbia (ITA)



**Business matching** through the **CDP Platform**



**CDP** funding line (€100 million) to support Serbia's energy transition and in support of SMEs in Serbia and Albania through Italian credit institutions (€100 million)



**Export and internationalization** credits and finance for development from **CDP**



Two **SACE Push strategies**: one with Telekom Srbija (€200 million) and one with the Serbian Ministry of Finance (€200 million), including related business matching activities; **Export Credit** and **internationalization** support



Package of **measures** from fund 394/81 managed by **SIMEST** for the **Western Balkans** (€400 million); Investment Line, **Equity** and **Export Credit Line**

# AFRICA

AN INVESTMENT IN THE FUTURE IN THE SPIRIT OF THE "MATTEI PLAN"

## PRIORITY SECTORS

- Energy and digital transition
- Sustainable mobility
- Instrumental mechanics and agribusiness



20,0 bn €

ITALIAN EXPORT 2024

-1,8% compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

1

MACHINERY AND MECHANICS

22,4%

2

COKE AND PETROLEUM PRODUCTS

16,7%

3

BASE AND PRODUCED METALS

10,3%

4

CHEMICALS

7,6%

5

ELECTRICAL APPLIANCES

7,6%

6

TEXTILES AND CLOTHING

6,6%

% of total export in the area

## ACTIONS

### ► POLITICAL-LED BUSINESS FORUMS

- ✓ SENEGAL
- ✓ IVORY COAST
- ✓ KENYA
- ✓ UGANDA

### ► SECTORIAL MISSIONS

- ✓ TANZANIA
- ✓ CONGO
- ✓ CAMEROON
- ✓ ANGOLA
- ✓ MOZAMBIQUE
- ✓ ETHIOPIA

- ✓ **Dakar, October 29, 2025 - Italy-Senegal Business Forum** chaired by the **VPoC/ Hon. Minister Tajani**
- **Fairs, business missions, training actions** for €5,300,000 and **incoming operators (ITA)**
- **Technology centers** for assistance, promotion, and training services on Italian technologies and processing methods
- Opening of **CDP representative offices** in Nairobi and Abidjan
- ✓ Activation of the **CDP Africa Fund** to finance (up to €500 million) companies with a stable presence on the continent; collaboration with the African Development Bank and with regional development banks (BOAD, AFC, Afreximbank, and TDB) (**CDP**)
- **Business matching** through the **CDP Platform** (launch planned in Côte d'Ivoire)
- **Push Strategy, business matching** activities (initiatives that have already been implemented in Côte d'Ivoire and Senegal ✓ and planned with AFC) and training initiatives (*Africa Champion Program*), **Export Credit** and **internationalization** support by **SACE**
- ✓ **SIMEST**: implementation of a €200 million **Facilitated Finance** measure dedicated to Africa; **Investment Line, Equity** and **Export Credit**
- Possible **feasibility studies** in the **infrastructure** sector

# LATIN AMERICA

NEW OPPORTUNITIES IN AN ECONOMIC AREA  
COMPLEMENTARY TO EUROPE

## PRIORITY SECTORS

- *Logistics Infrastructure*
- *Industrial Machinery*
- *Energy Transition*
- *Raw Materials*



**20,9** bn €  
ITALIAN EXPORT 2024

**+6,7%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

1

**MACHINERY AND  
MECHANICS**

**31,7%**

2

**TRANSPORT  
SECTOR**

**15,9%**

3

**METALS**

**7,7%**

4

**CHEMICALS**

**7,5%**

5

**MANUFACTURED  
PRODUCTS**

**7,3%**

6

**FOOD INDUSTRY**

**5,0%**

% of total exports in the area

## ACTIONS



### POLITICAL- LED BUSINESS FORUMS

- ✓ ARGENTINA
- ✓ BRAZIL
- ✓ MEXICO



### SECTORIAL MISSIONS

- ✓ CHILE  
PERU



**Rome, October 7, 2025 - 2th Italy-Latin America and Caribbean Conference:** initiative on the **Economic Partnership** aimed at promoting **growth** and **free trade**



Working with the European Union to expand **Free Trade Agreements** with the region and seize the opportunities offered by the **Global Gateway** strategy



**Fairs, business missions, large-scale organized retail** and **E-commerce agreements** for €4,600,000 and **incoming operators (ITA)**



**ITA business matching, OpportunItalia** Program, and **CDP Platform** (launch planned in Chile) **Export Credit** and internationalization, as well as Finance for development by **CDP**



Package of measures from **funds 394/81** and **295/73** managed by **SIMEST** for **Latin America** (€500 million)



**Push Strategy** and **business matching** activities by **SACE. Export Credit** and



**internationalization** support by **SACE**

# CENTRAL ASIA

A STRATEGIC HUB FOR INFRASTRUCTURE  
AND TRADE

## PRIORITY SECTORS

- *Industrial machinery*
- *Energy infrastructure*
- *Textiles*
- *Agribusiness*



**2,2** bn €  
ITALIAN EXPORT 2024

**+11,3%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

1

**MACHINERY AND  
MECHANICS**

**43%**

2

**TEXTILES AND  
CLOTHING**

**16,7%**

3

**MANUFACTURED  
PRODUCTS**

**8,9%**

4

**BASE METALS**

**6,4%**

5

**CHEMICALS**

**5,2%**

6

**TRANSPORT SECTOR**

**4,0%**

% of total exports in the area

## ACTIONS

- ✓ **Roundtable** on Italy-Kazakhstan investments chaired by the **VPoC/Hon. Minister Tajani**
- ✓ **Third Italy-Central Asia Ministerial Conference** with a focus on economic cooperation
- ✓ Country Presentation: **Kyrgyzstan**
- ✓ Country Presentation: **Tajikistan**
- ✓ Country Presentation: **Turkmenistan**
- Sector-specific technical-led missions
- **Fairs, Technology Days** for €650,000, and **incoming operators (ITA)**
- **Export Credit** and internationalization support by **SACE**; Kazakhstan Push Strategy in crucial sectors such as energy and infrastructure
- Export and internationalization **credits** and **CDP financing line** in favor of the Kazakh Development bank DBK (€200 million)
- **Business matching CDP Platform** (launch planned in Uzbekistan)
- **Facilitated Finance, Investment, Equity** and **Export Credit** lines managed by **SIMEST**





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# MATURE MARKETS



# UNITED STATES OF AMERICA



## ITALIAN EXPORT POSITIONING

USA



EXPORT MARKET  
FOR ITALIAN  
PRODUCTS



10,4 %  
OF TOTAL EXPORTS  
OF ITALY



64,7 bn €  
ITALIAN EXPORT 2024  
-3,6% compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

1

MACHINERY  
19,8%

2

PHARMACEUTICS  
AND CHEMICALS  
15,5%

3

TRANSPORT  
SECTOR  
12,3%

4

FOOD INDUSTRY  
12%

5

TEXTILES  
AND CLOTHING  
8,6%

6

OTHER MANUFACTURING  
ACTIVITIES  
7,8%

% of total export in the country



CROSS-SECTOR PROMOTION  
ACTION IN ALL PRIORITY EXPORT  
SECTORS

## ACTIONS

- Sector missions - focus on the **main sectors** of our export
- **Fairs, business missions, large-scale organized retail and e-commerce agreements** for €27,800,000 and incoming operators (ITA)
- **ITA business matching, Opportunitalia Program, and CDP Platform**
- **Export and internationalization credits** from **CDP** (two 2025 initiatives in support of an M&A operation already finalized for €350 million in the automotive and construction sectors ✓) and promotion of collaboration between **innovation ecosystems**
- **Facilitated finance, Investment Line, Equity** and **Export Credit** from **SIMEST**; forthcoming opening of the representative office in New York
- **Export** and internationalization credits support from **SACE**



## ITALIAN EXPORT POSITIONING

### SWITZERLAND

**5<sup>th</sup>** EXPORT MARKET  
FOR ITALIAN  
PRODUCTS



**4,9%**  
OF TOTAL  
EXPORTS OF ITALY



**30,2** bn €

ITALIAN EXPORT 2024

**-0,9%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

PHARMACEUTICS E  
CHEMICALS

**30,2%**

**2**

BASE METALS

**12,7%**

**3**

TEXTILES AND  
CLOTHING

**8,4%**

**4**

MANUFACTURING  
PRODUCTS

**8,2%**

**5**

TRANSPORT SECTOR

**7,2%**



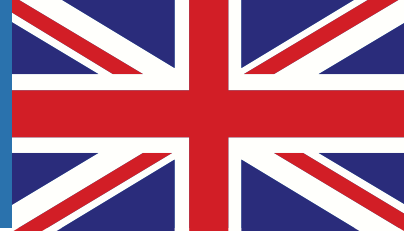
### PRIORITY SECTORS

- *Biotech*
- *Agri-food*
- *Luxury*
- *Aerospace*
- *Shipbuilding*

% of total export in the country

## ACTIONS

- **Economic partnership** initiatives during high-level bilateral visits
- **Fairs, business missions, large-scale organized retail and e-commerce agreements** for €2,800,000 and incoming operators (ITA)
- **ITA business matching, OpportunItalia** Program
- **Export and internationalization** credits support from **SACE**
- **ITA and CDP** initiative in Zurich to **promote co-investment opportunities** in Italy
- **Export and internationalization credits** support from **CDP**
- Promotion tools from **SIMEST**



## ITALIAN EXPORT POSITIONING

### UNITED KINGDOM

**6<sup>th</sup>** EXPORT MARKET  
FOR ITALIAN  
PRODUCTS



**4,4%**  
OF TOTAL  
EXPORTS OF  
ITALY



**27,4** bn €  
ITALIAN EXPORT 2024

**+5,3%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1**

TRANSPORT  
SECTORS

**16,8%**

**2**

FOOD INDUSTRY

**16,2%**

**3**

MACHINERY

**13,2%**

**4**

TEXTILES AND  
CLOTHING

**8,8%**

**5**

BASE METALS

**8,1%**

**6**

PHARMACEUTICALS AND  
CHEMICALS

**7,1%**



### PRIORITY SECTORS

- *Mechanics and automation*
- *Food industry*
- *Health and wellness*

% of total export in the country

## ACTIONS

- **CEO Forum** during the visit of the **VPoC / Hon. Minister Tajani** - date to be defined
- **Fairs, business missions, large-scale organized retail and e-commerce agreements** for €4,700,000 and incoming operators (**ITA**)
- **ITA Business matching, Opportunitalia Program, and CDP Platform**
- **Export and internationalization credits** from **CDP**
- **Promotion tools** from **SIMEST**
- **SACE** interventions for the realization of **major electrical interconnection projects** between Scotland and England and Export and internationalization credits support





## ITALIAN EXPORT POSITIONING

### JAPAN

**2<sup>nd</sup>** EXPORT MARKET  
FOR ITALIAN  
PRODUCTS IN  
CENTRAL-EASTERN  
ASIA



**14,5 %**  
OF TOTAL  
EXPORTS IN  
CENTRAL-  
EASTERN ASIA



**8,2** bn €  
**ITALIAN EXPORT 2024**  
**+2,5%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1** TEXTILES AND  
CLOTHES  
**27,3%**

**2** PHARMACEUTICS E  
CHEMICALS  
**14%**

**3** TRANSPORT  
SECTOR  
**13,7%**

**4** FOOD INDUSTRY  
**12,1%**

**5** MACHINERY  
**8%**



### PRIORITY SECTORS

- Food industry
- Pharmaceuticals
- Advanced technologies
- Textiles and clothing

% of total export in the country

## ACTIONS

- ✓ **Action Plan 2024-2027 for Strengthening Bilateral Partnership** signed by the two Heads of Government
- ✓ **Rome, May 13, 2025** - Meeting of the **Italy Japan Business Group**
- ✓ **Osaka, April 13, 2025** - Inauguration by the **VPoC / Hon. Minister Tajani** of the **Italy Pavilion Expo Osaka 2025**, and presentation of the **Asia-Pacific Focus** of the **Action Plan** for Italian Exports
- **Fairs, Business Missions, large-scale organized retail and E-commerce agreements** for €5,700,000 and incoming operators (ITA)
- **ITA business matching, Opportunitalia** Program, and **CDP Platform**
- **Export and internationalization** credits from **CDP** and promotion of collaboration between **innovation ecosystems**
- **Facilitated Finance, Investment, Equity** and **Export Credit** lines managed by **SIMEST**
- **Export and internationalization credits** support from **SACE**



## ITALIAN EXPORT POSITIONING

### CANADA

**21<sup>st</sup>** EXPORT  
DESTINATION  
MARKET OF ITALY



**1%**  
OF TOTAL  
EXPORTS OF  
ITALY

**6,1** bn €

**ITALIAN EXPORT 2024**

**-2,8%** compared to 2023

## MAIN SECTORS OF ITALIAN EXPORTS

**1** | FOOD INDUSTRY  
**22,6%**

**2** | MACHINERY  
**21,2%**

**3** | TEXTILES AND  
CLOTHING  
**10,6%**

**4** | TRANSPORT  
SECTOR  
**8,8%**

**5** | BASE METALS  
**7,2%**

**6** | MANUFACTURED  
PRODUCTS  
**7%**

### PRIORITY SECTORS

- Food industry
- Machinery
- Transport sector

% of total export in the country

## ACTIONS

- ✓ **Roadmap for Enhanced Cooperation between Italy and Canada** signed by the two Heads of Government
- **Economic partnership** initiatives during political-led missions related to **Canada's G7 presidency**
- ✓ **Rome, October 13, 2025 - Italy-Canada business partnership** event on Canadian investments in Italy
- **Trade fairs, business missions, large-scale distribution agreements, and e-commerce** for €2,200,000, along with incoming operators (ITA)
- Promotion of opportunities linked to the **Comprehensive Economic and Trade Agreement (CETA)** between Canada and the EU
- **Business matching (ITA), OpportunitItalia** Program, and **CDP Platform**
- **Export and internationalization credits** provided by **CDP** (initiative supporting local growth, already finalized for €215 million in the **electromechanical sector** ✓)
- **Export Credit** and internationalization support from **SACE**
- **Promotion tools** from **SIMEST**



# MATRIX MARKETS - SECTORS

Target Countries and sectors	Emerging markets													Mature markets					
	Türkiye	China	UAE	Mexico	Saudi Arabia	Brasil	India	South Africa	Algeria	ASEAN	Western Balkans	Africa	Latin America	Central Asia	United States	Switzerland	United Kingdom	Japan	Canada
agri-food		+	+	+		+				+	+		+	+	+	+	+	+	+
transport and sustainable mobility	+			+		+		+	+	+		+	+	+	+	+	+	+	+
cosmetics		+	+																
advanced technology, electronics, optics							+			+								+	
raw materials, energy, refinery					+			+	+	+		+	+						
pharmaceutics, biotech, health		+		+	+	+			+	+					+	+	+		+
rubber and plastic products							+				+								
infrastructures	+			+	+		+	+		+			+	+					
luxury/high quality goods	+	+	+		+			+								+			
machinery and advanced mechanics	+	+	+	+	+	+	+	+	+			+	+	+	+	+	+	+	+
metals	+			+	+	+	+				+	+	+	+		+	+		+
furniture/home décor					+														
chemical products	+	+		+		+	+	+	+	+	+	+	+	+		+		+	
space and defense	+		+		+		+			+								+	
green technologies and energy transition			+	+	+	+	+			+		+	+					+	
textiles and clothing	+	+	+	+						+	+			+	+	+	+	+	+



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# TOOLS FOR THE IMPLEMENTATION OF THE ACTION PLAN







## ITA - Italian Trade Agency

### National Pavilions at foreign trade fairs

This is a key initiative in ITA's promotional strategy. It aims to assist new businesses in entering foreign markets and consolidating their presence where already established. The initiative covers virtually the entire range of Italy's traditional, innovative, and emerging sectors. ITA offers **customized setups to promote the image of Made in Italy** and communication activities to enhance the collective participation of Italian businesses. In 2024, ITA organized 164 national pavilions in the countries included in the Action Plan, with the participation of 4,080 Italian companies. **In 2025, 123 national pavilions** have already been organized or scheduled.

### Incoming delegations to trade fairs in Italy

This is a crucial tool for strengthening the Italian trade fair system and expanding business opportunities for domestic exhibitors. ITA invites foreign professionals, including commercial figures (buyers, importers, agents, etc.), designers, architects, media representatives, and influencers. ITA also undertakes tailored communication actions in foreign markets to promote Italian exhibitions, events at trade fairs, thematic conferences, dedicated areas, and especially B2B meeting programs. **In 2024, a total of 125 incoming delegations visited Italy**, including those from countries included in the Action Plan. This activity will be further expanded in the current year.

### Large-Scale organized distribution and E-commerce

This activity holds significant benefits for Italian businesses, as it enables the inclusion of new Italian suppliers, the consolidation of existing ones, and the **promotion of authentic Made in Italy products** through specific agreements with foreign large-scale retail chains or e-commerce platforms. The actions involve large advertising investments to generate traffic. ITA also provides training for Italian businesses, foreign consumers, and sales staff. In 2024, 28 promotional activities were organized with large distribution and e-commerce partners in the countries listed in the Action Plan. This activity will be further strengthened in 2025.





## **ITA - Italian Trade Agency**

### **Business forums and entrepreneurial missions**

Delegations of Italian companies, focused on specific industries and supply chains, visit foreign markets to promote connections with local institutions and businesses. Politically-led business forums help strengthen bilateral relations, negotiate agreements and contracts, and create tangible commercial opportunities for companies of various sizes and sectors (goods and services sales, subcontracting, local procurement, etc.). In addition to institutional forum, ITA also organizes thematic presentations, company visits, and B2B programs. In 2024, numerous business forums and entrepreneurial missions were organized in the countries included in the Action Plan. In 2025, a total of 11 business missions have been completed or are scheduled.

### **Support services for Italian businesses**

The ITA Services Catalog offers a wide range of solutions for businesses starting their internationalization journey (Services to Know) as well as for those aiming to develop their presence in foreign markets (Services to Grow). Partner search, market analysis, product surveys, business meetings, regulatory and customs consulting are just some of the nearly 30 options that Italian companies can choose to receive assistance from ITA. Many of these services are provided free of charge. In 2024, ITA offices in the countries included in the Action Plan delivered over 17,000 services.

### **ITA office network**

In the Action Plan countries, ITA operates 42 offices with over 200 staff, including Italian permanent employees and local trade analysts. This network ensures effective promotional and assistance activities, providing Italian businesses with robust support in their target markets.





## **SIMEST**

### **Facilitated finance**

Through the public fund F.394/81, SIMEST provides financing to enhance international competitiveness. These are low-interest loans (around 0.5%) aimed at investments by companies and production chains in sustainability, innovation, digitalization, skills development, and growth in foreign markets, with a particular focus on strategic geographies.

### **Equity Investments**

SIMEST acquires minority, medium-to-long-term stakes in foreign companies owned by Italian enterprises in the context of greenfield, brownfield investments, or M&A transactions. SIMEST's involvement abroad enables the use of Venture Capital resources (Fund 394/81), a public tool with promotional conditions, and, in the case of investments outside the EU, interest rate subsidies on the proposing company's share, always financed through public resources (Fund 295/73).

### **Public Equity Funds**

Starting in 2025, two public Equity funds will be active, drawing from the Fund 394/81, aimed at supporting the growth of SMEs with international development plans and strategic infrastructure projects abroad.

### **Export credit**

Through the public Fund 295/73, SIMEST offers Italian exporters non-repayable export grants to minimize the financial costs borne by foreign buyers in contracts with medium-to-long-term deferred payments ( $\geq 24$  months). Operations are carried out in the form of Buyer Credit, crucial for finalizing large strategic export orders, and Supplier Credit, which is important for smaller orders in the manufacturing sector, primarily involving SMEs and Mid-Caps.

### **Strategic assistance abroad**

Since 2023, SIMEST has launched a plan to establish foreign branches in strategic geographies for Made in Italy (Serbia, Egypt, Vietnam, Brazil, Morocco) to provide strategic support to Italian companies wishing to enter and consolidate their presence in target markets.





## SIMEST

### Africa Measure

SIMEST manages a €200 million Africa reserve for facilitated financing under Fund 394/81 on behalf of the Ministry of Foreign Affairs and International Cooperation.

Specifically, this package is aimed at businesses established in, exporting to, or sourcing from Africa, businesses that are stable suppliers to the aforementioned companies, as well as companies planning investments in the region. It supports several kinds of investments: productive or commercial, productive or commercial investments; investments to strengthen equity; investments in technological, digital, and ecological innovation; investments in the training of African personnel, **either in Italy or in Africa.**

The measure includes a series of incentives for companies undertaking projects in Africa, leveraging 5 existing facilitated financing tools, with expanded eligible expenses and increased rewards (for requests submitted until December 31, 2025).

The measure allocates 10% of resources to youth-led, female-led, start-up companies, and innovative SMEs. Eligible companies may receive grants of up to 10%, rising to 20% for those with operational headquarters in Southern Italy, along with an exemption from guarantee requirements.

### Simest - Western Balkans Measure

In July 2024, the fund allocated to the Western Balkans was renewed with a total amount of €200 million, channeled through the Facilitated Financing Fund 394/81. The liquidity is intended for companies with direct interests in the region, specifically those that export or import from the Western Balkans or are present – either directly or through their supply chains – in this area. Companies with interests in the Western Balkans may also access co-financing in the form of a non-repayable grant of up to 10% of the requested financing and exemption from the requirement to provide guarantees. This new reserve adds to the similar measure, also worth €200 million, launched in July 2023, that funded 455 investments in the region.







## SIMEST

### Central and South America Measure

With the 2025 Budget Law, a ceiling of €200 million has been allocated for a new package of measures aimed at facilitating investments by Italian companies in Central and South America. Specifically, the package is intended for businesses established in, exporting to, or sourcing from Central or South America, stable suppliers to these entities, and companies planning investments in the region. It aims to support productive or commercial ventures, equity strengthening, technological, digital, and ecological innovation, and workforce training.

The measure is integrated with a set of incentives for companies that implement projects in Latin America under 5 already existing subsidized finance instruments with the expansion of eligible expenses and rewards (for requests until 31.12.2026). For these companies, the measure in fact provides for the possibility of accessing a non-repayable share of up to 10%, high up to 20% for companies with operational headquarters in Southern Italy, in addition to the exemption from the presentation of guarantees. The measure includes an export contribution of up to 5% based on a 300€million ceiling dedicated to supporting Italian exports in the area.

### India Measure

Since September 2025, a **credit limit of 200 million euros of subsidized finance** has been active for the ad hoc “Strategic Support for the Indian Market” instrument intended for export companies with **exports, imports or presence in India, and companies in their supply chain** as well as for non-export companies that intend to invest in India.

This instrument aims to support investments in sustainable and digital transition as well as in the scouting of new business opportunities and strategic consultancy, in addition to expenses for capital strengthening - including increases in share capital and shareholder financing for subsidiary companies - and for staff training.

The measure provides for a non-repayable share of up to 10%, high up to 20% for companies with operational headquarters in Southern Italy and for start-ups and innovative SMEs. These conditions also apply to enterprises implementing projects in India under 5 ordinary concessional finance instruments.

As part of the Measure, **a credit limit of 300 €million is also foreseen to support Italian exports in the area**, with the provision of export contributions of up to 5%.





## SIMEST

### New Equity operations of the 394 Fund

The Facilitation Committee has also approved the implementation of two new sections of the 394 Fund, as provided by the 2025 Budget Law. These are the **"Growth Section"** and the **"Investments and Infrastructure Section"**.

- **Growth SME ceiling**

With an initial financial allocation of €100 million, the Growth Ceiling is intended for equity interventions to strengthen the share capital of small and medium-sized enterprises and medium-capitalized businesses, to support their internationalization processes and growth in international markets. Operations will be carried out in co-investment with leading private equity operators.

- **Infrastructure Investment**

With an initial financial allocation of €100 million, the measure is aimed at equity interventions in companies, directly or indirectly involved in infrastructure projects with Italian companies. It aims to enhance the global competitiveness of Italian businesses, with operations spanning all countries and a priority on projects in the Arabian Peninsula region.

### Digital or ecological transition tool

#### **Energy-Intensive Companies Measure**

The "Digital or Ecological Transition" tool has been renewed and extended to include exporting energy-intensive companies ( $\geq 3\%$ ) or those that have undertaken certified energy efficiency pathways, with the aim of strengthening financial stability and alleviating the impact of energy costs. These companies will be able to finance:

- **Up to 90% of the financing** for investments in capital strengthening
- **The increase in share capital** and financing for shareholders in controlled companies up to €800,000
- Expenses for **digital transition, sustainability, and innovation**

A non-repayable grant of up to 20% is provided, along with an exemption from guarantees.

### Extension to non-exporting companies belonging to supply chains

From August 2025, the "Digital or ecological transition" tool has been extended to all non-exporting companies belonging to production chains with a vocation for exports, to the advantage of the international competitiveness of Italian supply chains.





## **CASSA DEPOSITI E PRESTITI (CDP)**

### **Export Credit for Foreign Buyers for the Purchase of Italian Goods and Services**

CDP supports foreign counterparties (businesses, governments, and banks) by granting medium- to long-term financing for the purchase of goods and services from Italian companies (and/or their foreign subsidiaries/affiliates). This initiative aims to support Italian exports by offering a competitive financial package. The financing is provided in co-financing with banks, ensuring foreign buyers the creation of strategic financial pools. This is made possible by CDP's role as an institutional actor committed to promoting the sustainable development of the projects and international economies it invests in. CDP's financing, available at fixed or variable rates, can be insured by SACE or other Export Credit Agencies. Additionally, SIMEST can stabilize the interest rate and offer non-repayable interest rate subsidies to reduce the rate applied to the financing. The joint intervention of CDP, SACE, and SIMEST allows foreign buyers to obtain financing with longer durations, favorable interest rates, and expand credit lines with the banking system.

### **Medium-to-Long-Term Credit to Italian Companies for Internationalization Plans**

CDP provides medium- and long-term direct financing, at market conditions, to medium and large Italian companies (and/or their foreign subsidiaries/affiliates and foreign project companies with Italian sponsors) to support international growth (e.g., investments, acquisitions). The characteristics of the financing provided by CDP, adjustable according to the specific needs of the company, vary based on the investment plan's purpose, the counterparty's rating (and the target company's rating in the case of M&A transactions), and the "security package" proposed by the company. This operation may also involve a synergistic action by SACE and SIMEST to support businesses, respectively in terms of guarantees and equity loans.





## **CASSA DEPOSITI E PRESTITI**

### **Financing Sustainable Projects of Italian Companies in Emerging or Developing Countries**

CDP, in its role as the Italian Financial Institution for Development Cooperation, finances projects to support development in emerging or developing countries with high impact on the social, economic and environmental fabric. The facility is aimed at strategic projects implemented by medium and large enterprises and is implemented through medium- to long-term financing - with or without recourse on shareholders - to the benefit special purpose vehicles created ad hoc or directly to local businesses, structured on the basis of the specific characteristics of the investment project and business needs. In this context, CDP can support projects in pools with other lenders and investors.

### **International Market Support through the Business Matching Platform**

CDP's support for Italian companies in foreign markets is further strengthened through the Business Matching Platform. The tool is operational in 19 countries (including India, China, Japan, Mexico, Indonesia, USA, South Africa, Brazil, Vietnam, Canada, UK, UAE, Tunisia, and Egypt), with the shared goal of further expanding to countries like Türkiye and Saudi Arabia in 2025. After registration, companies can access their dashboard, explore matches suggested by the algorithm, select relevant foreign counterparts, and initiate B2B contact in a secure environment.





## SACE

### Export Credit

*This tool supports the export of goods and/or services and/or the execution of works abroad by Italian companies, in relation to commercial contracts with foreign counterparts (sovereigns, public entities, banks, private entities) through the provision of insurance coverage.*

1. **Supplier Credit**: it guarantees individual transactions against the risk of non-payment for payment terms of 24 months or more to OECD countries and without time limits in all other countries. The policy facilitates the monetization of insured receivables through non-recourse discounting of the notes, with transfer (endorsement) of the policy to the bank or another financial intermediary.
2. **Buyer credit**: it guarantees financing granted by banks to foreign clients, either on a corporate or project finance basis, in transactions involving the Italian company or its foreign subsidiaries as the exporter, investor, or buyer.
3. **Documentary Credit Confirmation Policy**: it allows the Italian bank, involved in confirming credits on individual commercial transactions made abroad by the Italian company, to be covered against the risk of non-repayment by the foreign bank.

### Support for Internationalization

This operational area involves SACE's intervention through the issuance of guarantees for the risk of non-repayment regarding financing, bonds, debt securities, and other financial instruments related to the internationalization process of Italian companies.

1. **Push Strategy**: the Push Strategy encourages Italian exports, particularly of SMEs, facilitating access to **foreign markets with high potential for Made in Italy** through partnerships with large international buyers. SACE intervenes by guaranteeing medium-long term general purpose financing, granted by banks to high-profile foreign counterparties (large companies, public bodies and financial institutions). The tool is aimed at generating **additional shares of Italian exports** in the reference markets: to this end the beneficiary of the loan undertakes to meet Italian SMEs through business matching initiatives organized by SACE in synergy with the other actors of the country system (Embassies, Offices ICE, trade associations), which allow Italian companies to place themselves on the vendor lists of international buyers.







## **SACE**

**2. Internationalization Guarantees:** SACE supports Italian companies in their growth processes in foreign markets by guaranteeing financing granted by partner banks to support project activities related to internationalization, including acquisitions, infrastructure investments, investments in production capacity, and innovations in sustainability (e.g., new technologies, energy efficiency, pursuing environmental goals, etc.).

**3. Guarantees:** bonds include various types of guarantees that ensure the fulfillment of contractual obligations and the proper execution of works. These guarantees may refer to participation in foreign tenders, the signing of contracts if awarded, proper execution of contracts, and the quality of works, as well as the repayment of advances paid by the client.

**Political Risk Insurance:** this tool protects capital contributions abroad (loans and equity) against political risks (such as nationalization, embargoes, civil unrest) that could cause losses to the invested capital in all cases where a company is established abroad or an acquisition is made, even in joint ventures with non-Italian partners.





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