

3° EFIDA CONGRESS

FNDI THE ITALIAN FEDERATION OF INDUSTRIAL DISTRIBUTORS

Verona 19 June 2009

Mission

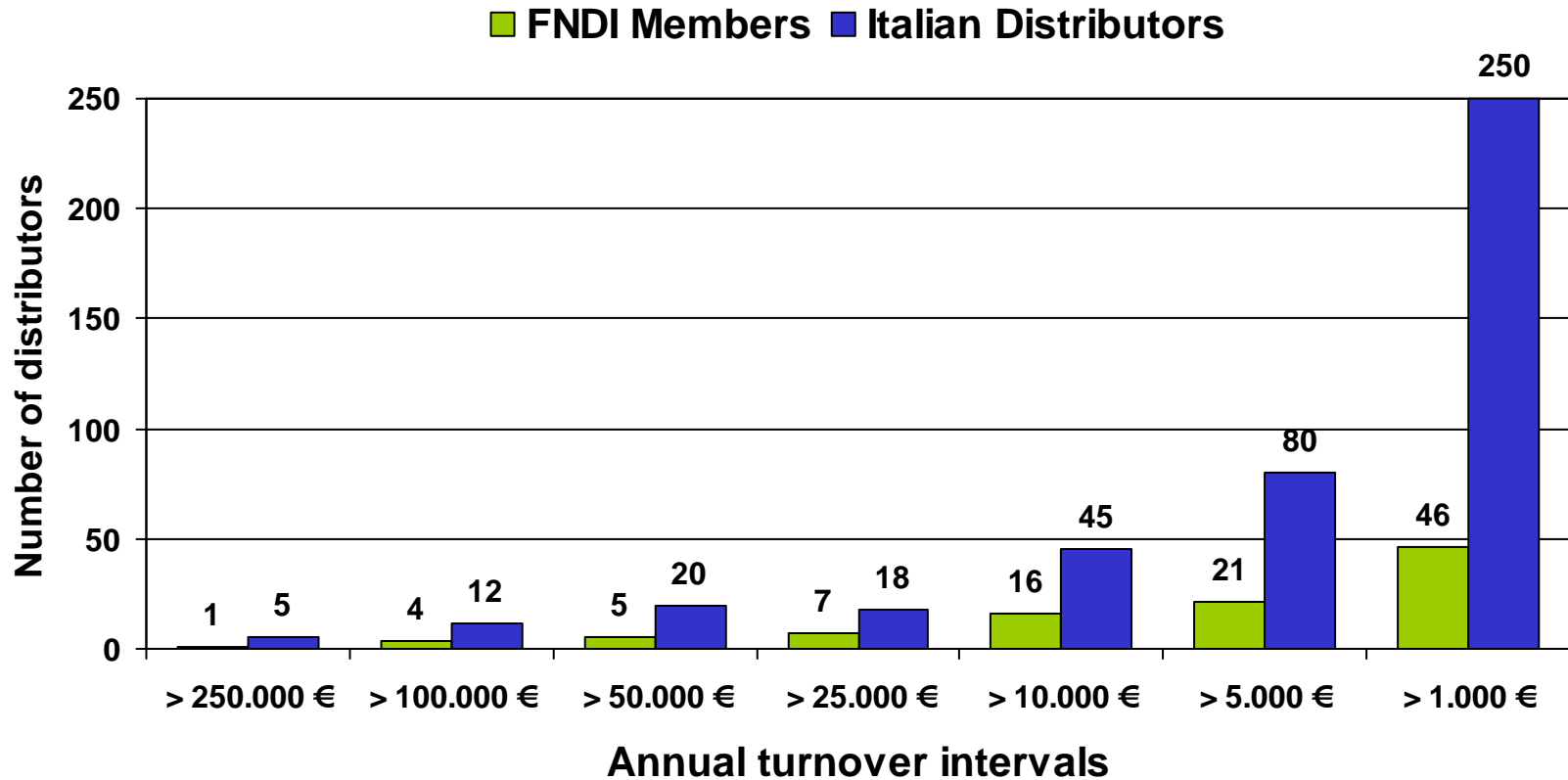
- **Developing the management skills of Italian Industrial Distributors**
- **Promoting and enhancing the corporate image of the Members**
- **Strengthening Distributors leading role in the market**
- **Ensuring a lobbying action to safeguard economic and social interests of this specific professional category**

FNDI accounts for about 100 Members

Totalling a turnover exceeding 1,2 Billions Euro

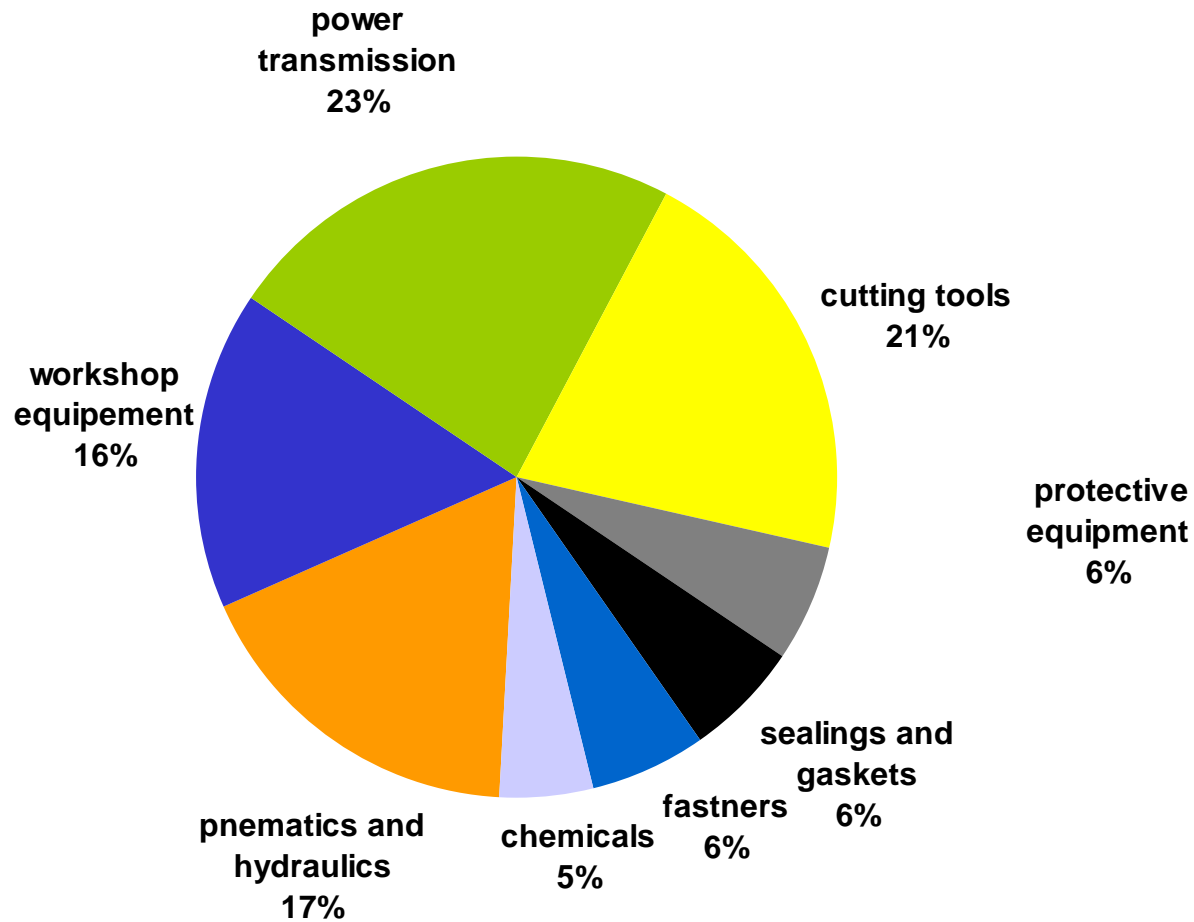
Offering a wide product range: cutting tools, machine tools, pumps, mechanical transmissions, hydraulic components, automatic control, sealing, electrical maintenance, automation, drives, etc.

Members and potential members



The annual turnover for 67% of the members accounts for less than 5.000 €!

Product lines

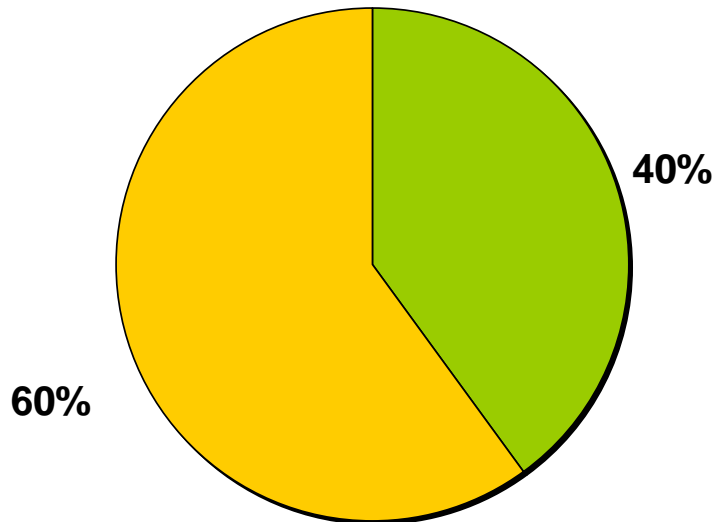


Sales volumes

**FNDI members sales volume
in 2008 : 1,2 billion euros**

**FNDI potential members
sales volume in 2008 : 1,8
billion euros**

■ FNDI Members ■ FNDI Potential members



- **Up-to-date information on the market**
- **Professional training and workshops**
- **Conferences dealing with topical subjects**
- **Meetings for the exchange of experiences and information**
- **Co-marketing agreements for main Italian Exhibitions related to Industrial Distribution markets**
- **Specific agreements for services related to Members' entrepreneurial activities at a reduced cost**

- **IL DISTRIBUTORE INDUSTRIALE** is the official magazine of the Association with a national circulation of 3.000 copies
- On-line since December 2000, www.fndi.it offers its Members the possibility of establishing contacts with potential customers and manufacturers; additionally it provides information on the Association and its Members' activities as well as up-to-date news on the market.

- **The turnover fall average of Italian industrial distributors is in between - 35% and - 50% compared to 2008 in first and second quarter**
- **Some sectors are dramatically under performing such as : paper industry, wood industry, gold industry, leather industry, heavy metal industry**
- **In some market niches the trend is - 60% such as machine and cutting tools**
- **Some sectors have registered a lighter slowdown such as food and packaging industries**
- **The general opinion is that this trend will last until the end of the year, may be a smooth growth, not more than 3%-6%, in 2010.**

Thank you for your attention !



The screenshot shows the FNDI website in a Windows Internet Explorer browser window. The address bar displays <http://www.fndi.it/>. The website header includes the FNDI logo and navigation links: Home, L'associazione, Gli Associati, Diventa Socio, I Servizi, La Formazione, and Contatti. The main content area is divided into several sections:

- L'INDUSTRIA IN BUONE MANI**: A text block describing FNDI as the unique association representing the industrial distribution sector in Italy, with 95 member companies and 3000 employees.
- EVENTI**: A list of events, including "Villafraanca (VR), 18-19 giugno 2009" and "Milano, 21 maggio 2009".
- IN RILIEVO**: A section highlighting key events and regulations, such as "LE GIORNATE DEL DISTRIBUTORE 2009" and "REGOLAMENTO GHS".
- PARTNERSHIP**: A section featuring logos for THOMAS Industrial Media and IEN Italia.

The browser's taskbar at the bottom shows the system tray with the date 18.28 and the address bar displaying <http://www.dnv.it/>.