

Demand Driven: that's why it is mandatory for Italian manufacturers

Igino Colella Garofalo **CSCMP Italy Roundtable** President

Milano, 16 Giugno 2026



Demand Driven Italia
Torre PwC, Milano
16 Giugno 2026

Agenda

- 9:45 Benvenuto e introduzione - **Igino Colella**, President, CSCMP Italy RT
- 10:00 Keynote: **Carol Ptak** (in inglese)
- 10:45 Case Study 1: A2A – Federico Mauri
- 11:30 Coffee Break
- 11:45 Dalla strategia all'execution: casi di successo con CyberPlan DDMRP
- 12:30 Case Study 2: OMFB SpA Hydraulic Components – **Giovanni Buizza**
- 13:15 Business Lunch
- 14:15 Case Study 3: Minipack-Torre SpA – **Fabio Abbiati**
- 15:00 Case Study 4: Haier Europe – **Raffaele Sabia**
- 15:45 Intelligenza Artificiale a supporto del DDMRP: dalla definizione dei buffer all'analisi delle performance
- 16:30 Networking & Cocktail di chiusura



Manifesto della Round Table Italiana del CSCMP

- La Round Table Italiana del CSCMP è il luogo d'incontro dei professionisti della Supply Chain per:
 - Scambiarsi conoscenze, esperienze e buone pratiche
 - Approfondire la conoscenza della professione grazie anche all'apporto di colleghi e studiosi di altre nazioni
 - Collaborare a progetti d'interesse comune
 - Offrire e trovare opportunità di lavoro
- A questo scopo i membri:
 - Organizzano e partecipano ad eventi e discussioni
 - Realizzano progetti di sviluppo e/o sistematizzazione delle buone pratiche della professione
 - S'incontrano e discutono regolarmente
- www.cscmp.org www.cscmpitaly.org

- **Connettere**
- **Sviluppare**
- **Formare**

**CSCMP Italy Roundtable awarded in 2018
for Continuous Development**



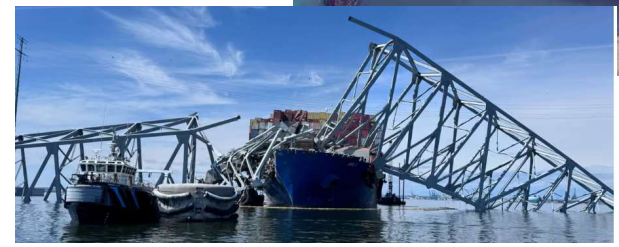
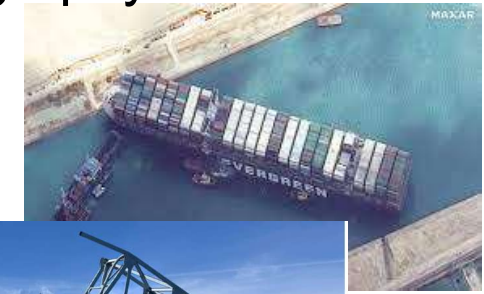
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We live in Interesting Times !



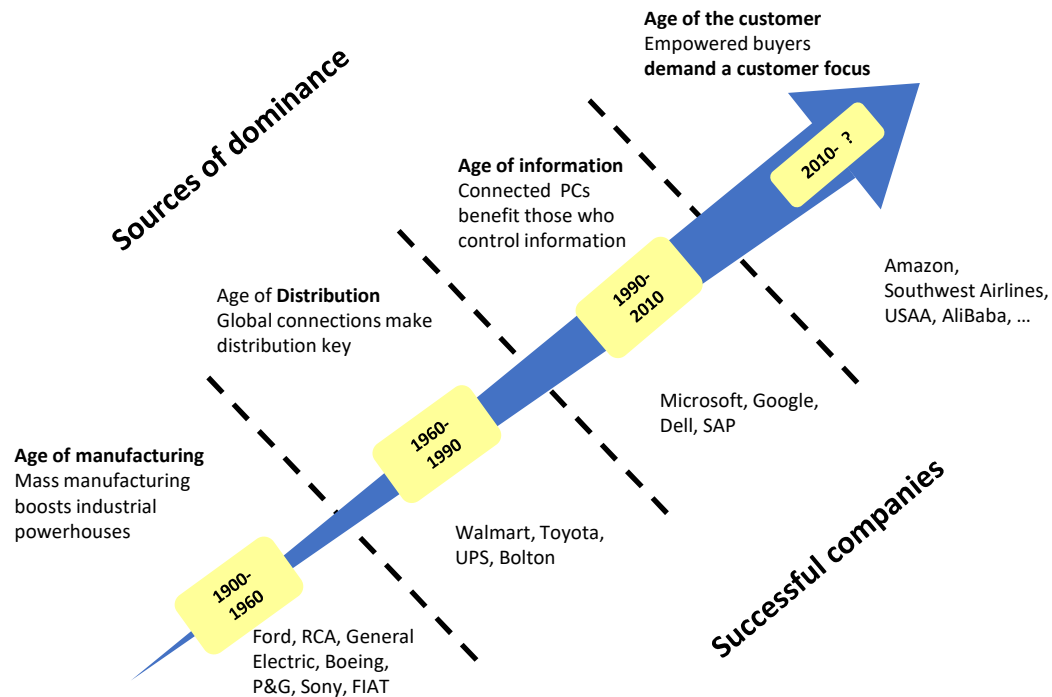
- Scarcity
- Drought / Flood / Extreme Weather
- Wars
- Sustainability
- Customer Centricity
- Omnichannel commerce
- Truck Drivers and Workers Shortage
- Digital Skills
- Volatility: Costs, Demand, Container & Transportation Rates, Fuel

- Tariffs, Trade Wars, Sanctions, sudden changes
- Covid-19 and Pandemics
- Brexit
- Increasing Risks (i.e. Suez: Ever Given, Baltimora Bridge)
- Supply uncertainty
- Technology, Automation, AI
- ...
- Inflation
- Demography



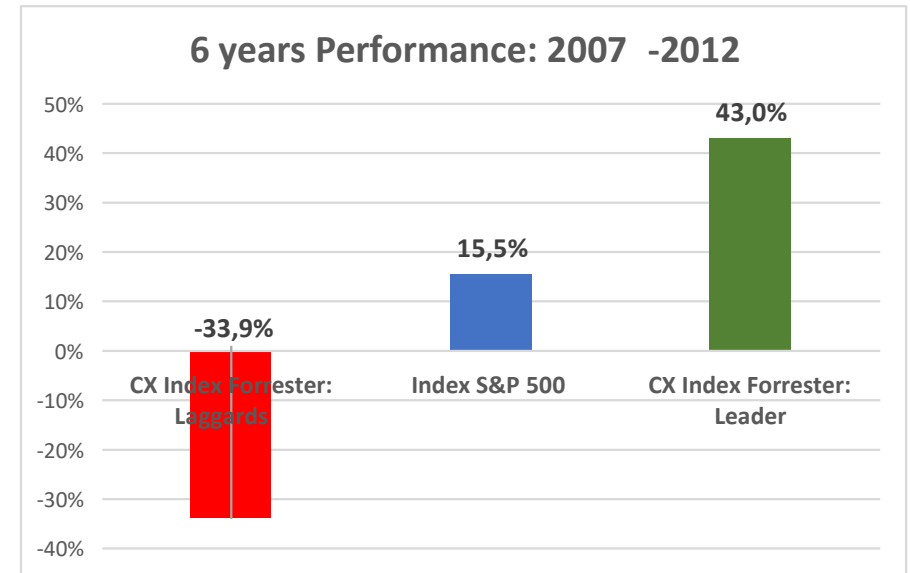
VUCA is not enough

We have Entered the Age of the Customer and Customer Centricity brings value



Customer Intimacy requires an exceptional Service Level:

- Responsiveness
- Competitive order cycle time
- OnTime-InFull Delivery



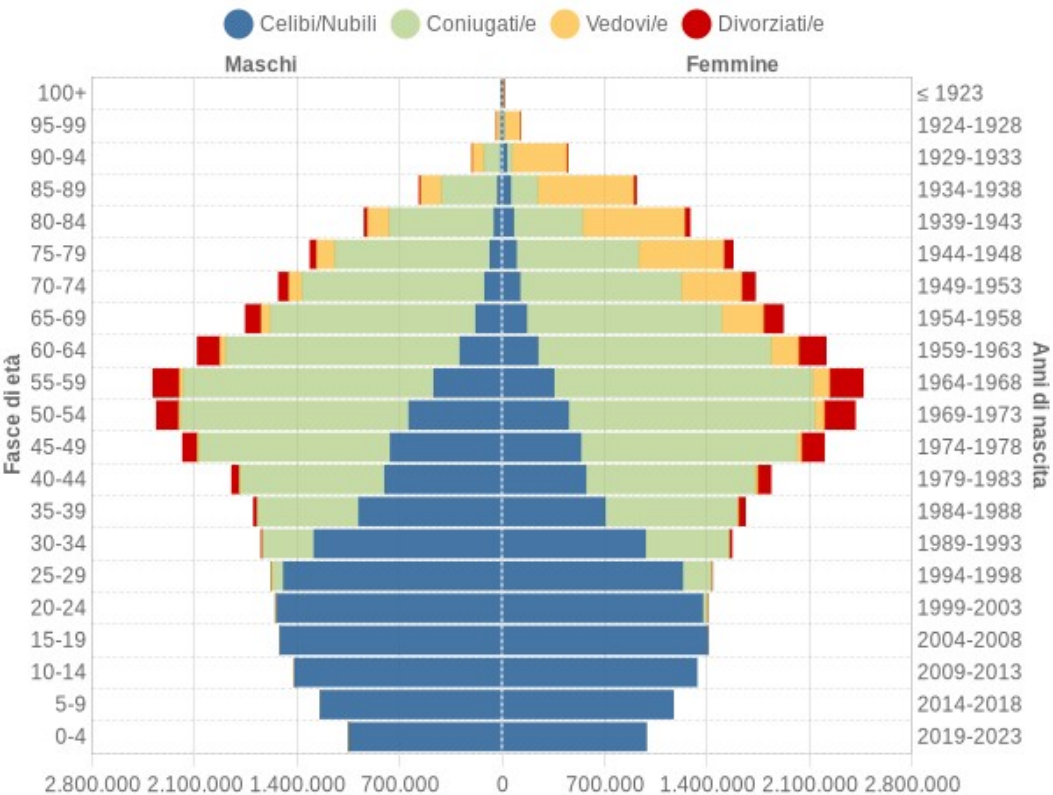
Source: Watermark Consulting



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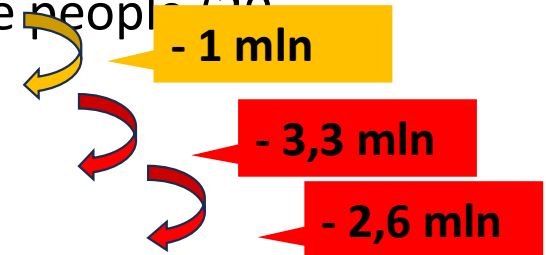
Source: Harley Manning e Kerry Bodine, *Clienti al centro*, 2012

Italian Population is older and shrinking, despite immigrants (2024)



Popolazione per età, sesso e stato civile - 2024
ITALIA - Dati ISTAT 1° gennaio 2024 - Elaborazione TUTTITALIA.IT

- Population decreases for low births and young workers emigration
- Immigration is not enough
- Future forecasts show a strong reduction of working age people (20-65)
 - ❖ 2025: 34.433.000
 - ❖ 2030: 33.511.000
 - ❖ 2040: 30.245.000
 - ❖ 2050: 27.677.000
- Automation, robots and immigrants may cover the needs



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Italian Firms (Industrial and Service, including Groups) are small. Beside large firm, the backbone of industrial structure are Medium Business 50-249 employees

It is difficult to invest in process and software at these sizes!

Employee class	Firms #		Employees		Turnover mln €		Added Value mln€		Added Value per Empl. €	Employee cost €
0 - 9	4.245.950	94,92%	7.467.762	42,25%	901.220	21,50%	271.630	27,16%	36.400	26.600
10 - 19	139.739	3,12%	1.835.779	10,39%	377.266	9,00%	95.644	9,56%	52.100	33.700
20 - 49	58.138	1,30%	1.721.139	9,74%	477.977	11,40%	108.657	10,86%	63.100	38.700
50 - 249	24.796	0,55%	2.417.557	13,68%	901.778	21,52%	178.986	17,90%	74.000	44.000
250 +	4.343	0,10%	4.232.006	23,94%	1.532.714	36,57%	345.236	34,52%	81.600	46.400
Total	4.472.966	100%	17.674.243	100%	4.190.955	100%	1.000.153	100%	56.600	38.700

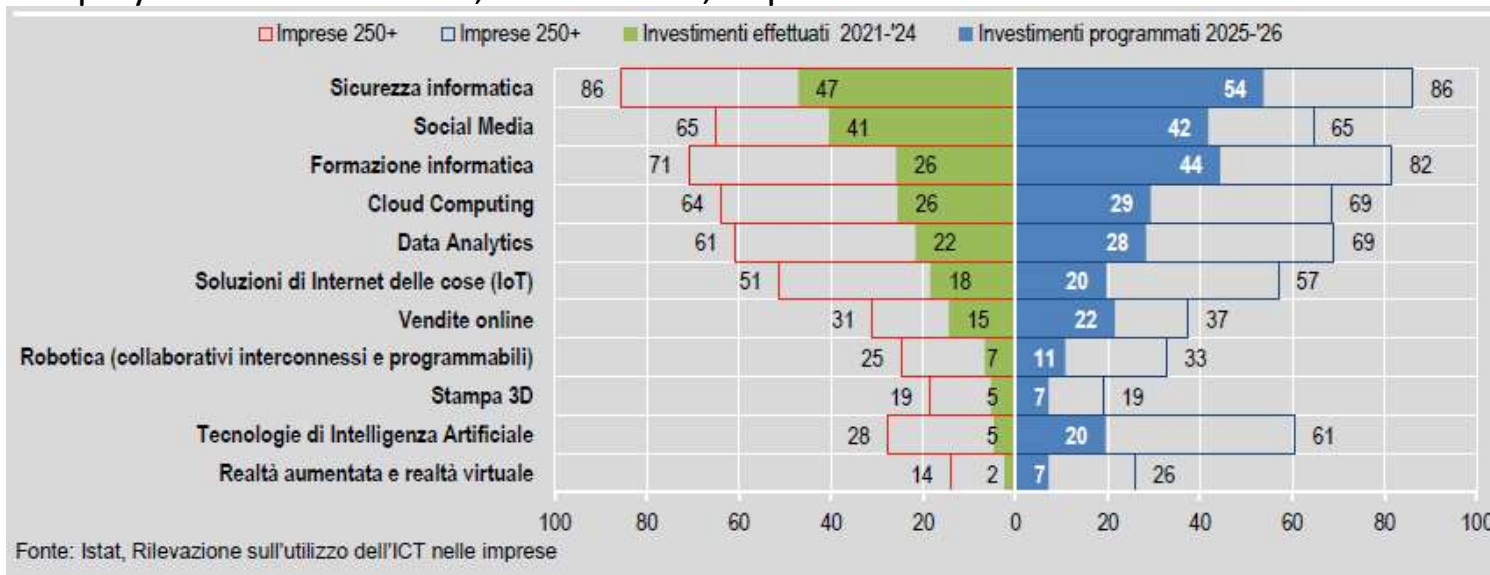
Source: ISTAT, Conti Economici delle imprese e dei gruppi di impresa, year 2022



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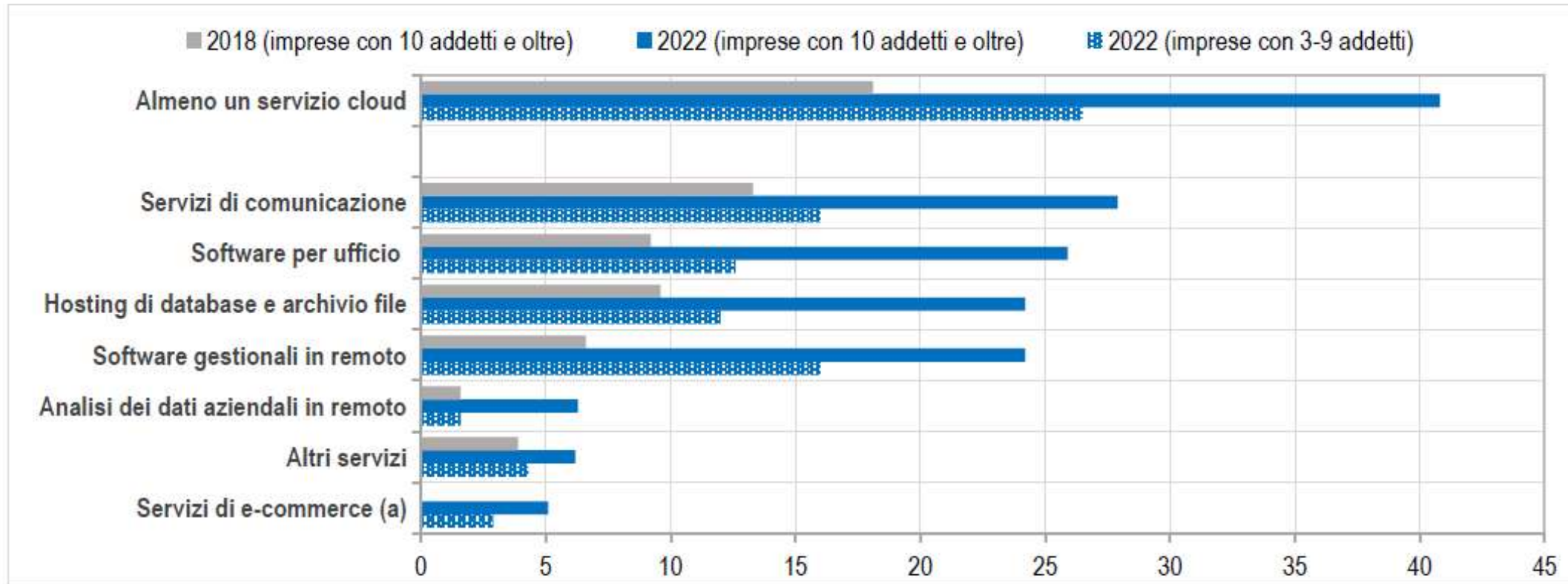
Italian Firms have a low level of Digitalization

Firm Investments in ICT per size: 10-49 Employees – bars filled and >250 Employees – bars outlined; source ISTAT, Imprese e ICT 2024



- Low level of diffusion and maturity
- Low percentage of Firms with investments, done or planned

Italian Firms (≥ 10 employees) are increasing their IT tools (2022 vs 2018) but 50% have no ERP, less than 15% use Planning software or CRM)



(a) Modalità di risposta inserita nel questionario 2022, non presente nel 2018.

Source: ISTAT, Censimento permanente delle imprese 2023



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Employee Engagement: Italy is improving but low

Rank	Country	Change	% Engaged
1	Romania	-2	35
2	Albania	3	29
3	Kosovo	1	25
4	Sweden	2	24
5	Iceland	-2	24
6	Estonia	-1	24
7	Malta	0	22
8	Latvia	-2	22
9	Norway	0	21
10	Denmark	-1	21
11	Hungary	0	20
12	North Macedonia	-5	20
13	Lithuania	-1	19
14	Portugal	1	19
15	Cyprus	0	18
16	Bosnia and Herzegovina	-3	17
17	Slovenia	1	17
18	Bulgaria	-1	17
19	Serbia	0	17

Rank	Country	Change	% Engaged
20	Montenegro	0	16
21	Czech Republic	1	16
22	Netherlands	2	16
23	Finland	0	15
24	Northern Cyprus (Territory of Republic of Cyprus)	0	14
25	Slovakia	-2	14
26	Greece	0	13
27	Germany	-3	12
28	Italy	2	10
29	Belgium	-2	10
30	United Kingdom	0	10
31	Austria	-1	9
32	Ireland	-1	9
33	Spain	0	9
34	Luxembourg	0	8
35	Poland	-2	8
36	France	1	8
37	Switzerland	-1	8
38	Croatia	-5	7

- Only 10% of Employees ENGAGED, +2 vs previous year
- Not easy to find a new job: Job climate 49 (33th out of 38 in ranking)
- However Life evaluation (47, 16th out of 38) and Stress 49 (5th out of 38) are at top

Source: State of the Global Workplace: 2025 Report, Gallup



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How to compete?

- Better Employees Engagement > have them trained and provide effective methods and tools
- A fast, reliable and effective production planning: embrace Demand Driven !
- Never stop improving



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Vi potete associare:

- Iscrizione al CSCMP su sito www.cscmp.org al costo di 175\$, include automaticamente l'Associazione Italiana
- Associazione Italiana al costo di 100 € per 12 mesi
- Registrazione su LinkedIn alla pagina del gruppo Italy CSCMP e iscrizione alla newsletter



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Grazie per l'attenzione.

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