

Annual Review Plastics and Rubber Machinery

June 2024

2023 – Review



	<u>2021</u>	<u>2022</u>	<u>2023</u>
» New Orders: (Change in %)	42	-6	-16
– Domestic Market:	44	-10	-14
– Export Total:	41	-6	-16
– Euro-Countries:	44	20	-17
» Orders on Hand (Months):	16.3	19.3	16.5
» Capacity Utilisation (%):	96	93	86
» Production (m €): Change over previous year (%)	7,557 (7.7)	8,574 (13.5)	8,864 (3.4)
» Export (m €): Change over previous year (%)	5,236 (11.8)	5,753 (9.9)	6,169 (7.2)
» Export Share (%):	69.3	67.1	69.6

2023 – Review



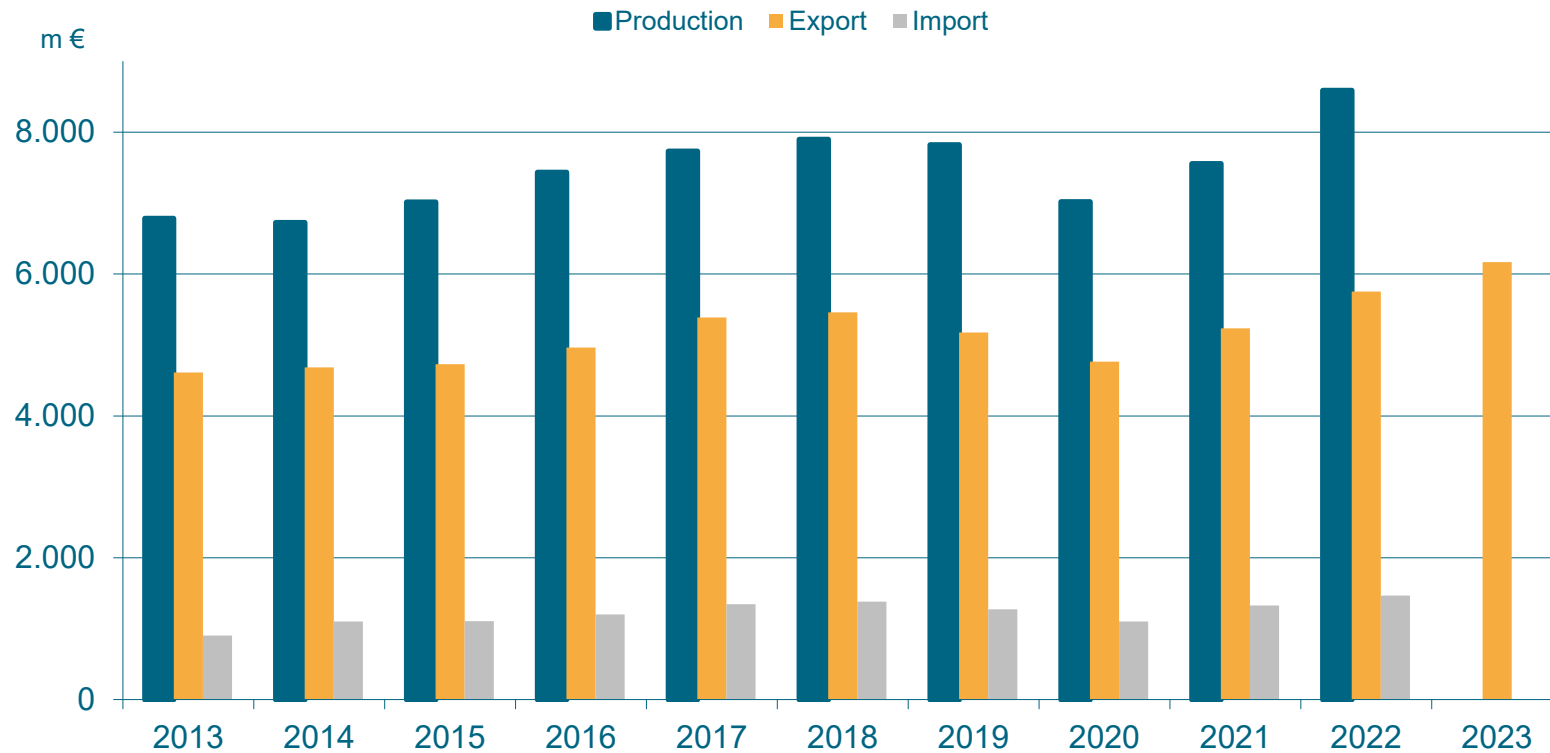
	<u>2021</u>	<u>2022</u>	<u>2023</u>
» Import (m €):	1,329	1,467	1,465
Change over previous year (%)	(20.8)	(10.4)	(-0.1)
» Trade Balance (m €):	3,907	4,287	4,704
Change over previous year (%)	(6.6)	(9.7)	(9.7)
» Domestic Market (m €):	3,650	4,287	4,160
Change over previous year (%)	(8.9)	(17.5)	(-3.0)
» Share of Import in Domestic Market (%):	36.4	34.2	35.2
» Work Force:	30,500	31,100	30,800

German Production – Export – Import



Production: change over previous year

2021/2020	2022/2021	2023/2022
7.7 %	13.5 %	3.4%



m €

2021: 7.557

2022: 8.574

2023: 8.864

Core Machinery

Source: VDMA

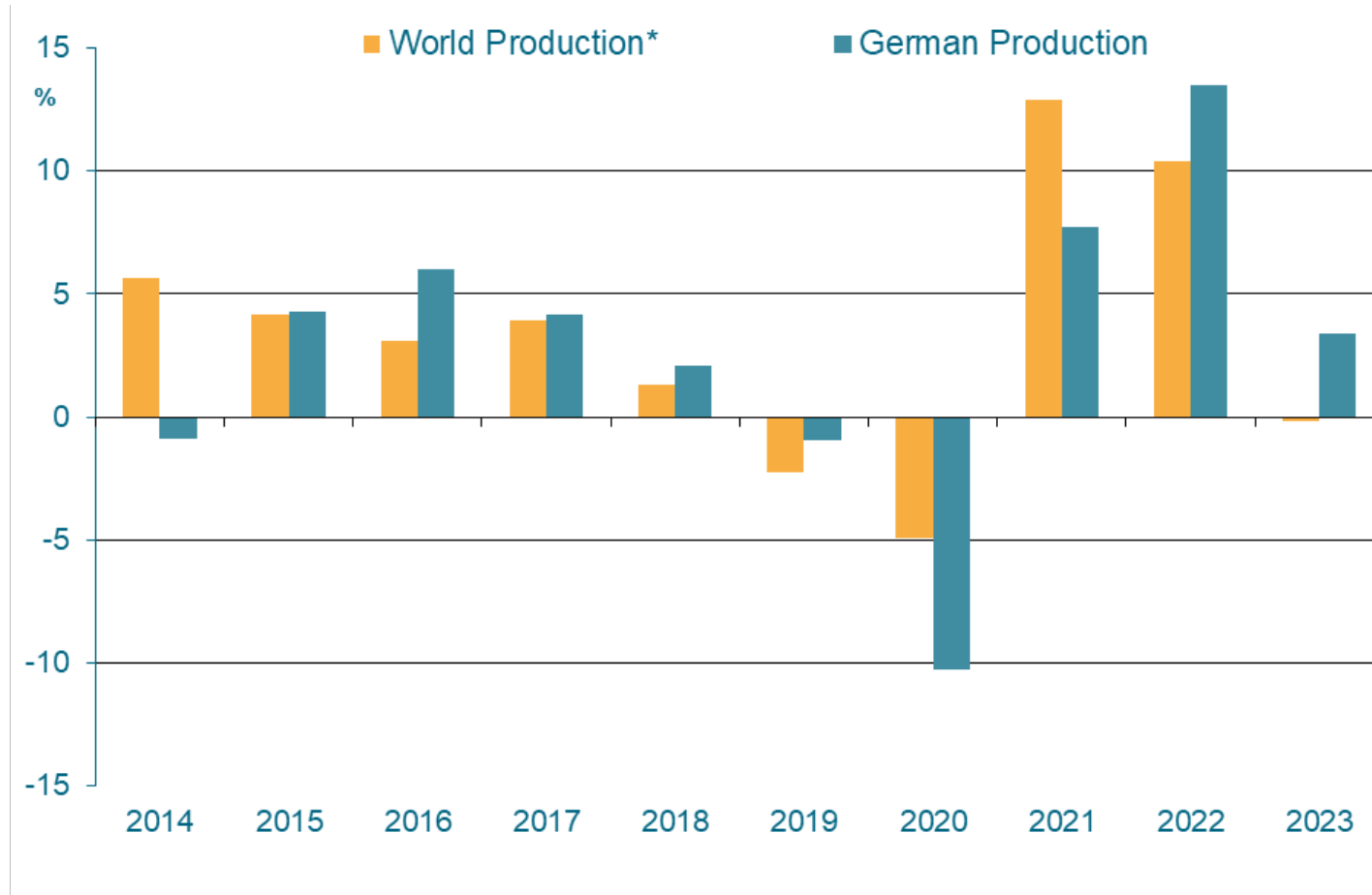
2023 – Review



	<u>2021</u>	<u>2022</u>	<u>2023</u>
» Core Machinery (m €):	7,557	8,574	8,864
Change over previous year (%)	(7.7)	(13.5)	(3.4)
» Moulds and Dies (m €):	1,900	1,882	2,001
Change over previous year (%)	(-5.1)	(-1.0)	(6.4)
» Resin and Parts´ Handling (m €):	797	1,020	1,053
Change over previous year (%)	(18.1)	(28.0)	(3.2)
» Flexographic printing machines for films (m €):	329	369	430
Change over previous year (%)	(15.4)	(12.1)	(16.6)
» Total (m €):	10,584	11,845	12,348
Change over previous year (%)	(5.9)	(11.9)	(4.2)

Source: VDMA

German and World Production



Core Machinery

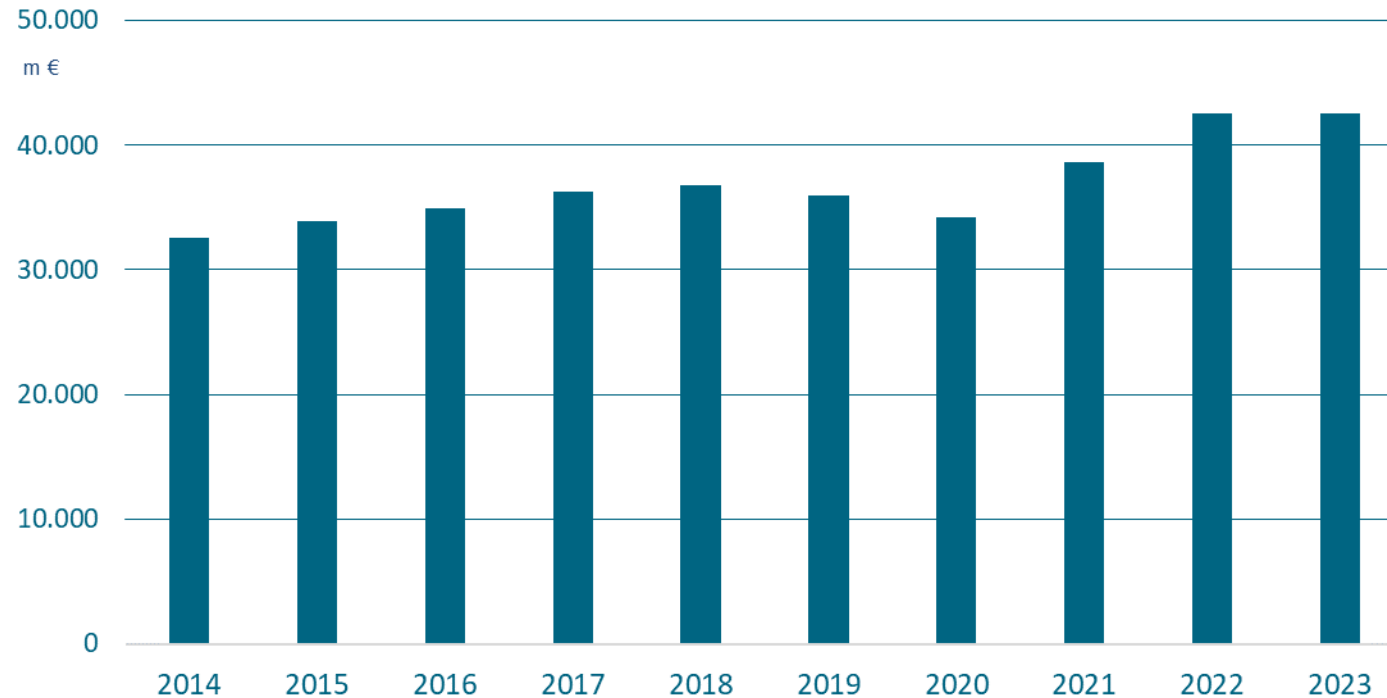
Source: VDMA / Federal Statistical Office

World Production Plastics and Rubber Machinery



Change over previous year

2021/2020	2022/2021	2023/2022
12.9 %	10.4%	-0.2%



m €

2021: 38,597

2022: 42,593

2023: 42,505

Core Machinery

Source: VDMA / Federal Statistical Office

World Production – Shares



Year	World Production*	Shares of particular countries (%)					
	(m €)	EU27+UK	China	Germany	Italy	USA	Japan
2018	36,795	42.3	31.1	21.5	7.8	7.1	3.9
2019	35,971	43.9	31.1	21.7	7.8	6.6	4.6
2020	34,193	40.9	34.4	20.4	7.0	7.0	4.1
2021	38,597	40.0	35.0	19.6	7.1	6.7	4.1
2022	42,593	40.8	33.3	20.2	6.8	7.3	3.9
2023	42,505	42.7	31.7	20.9	7.1	7.4	4.0

Germany remains one of the leading export countries



Core Machinery

*incl. Estimates for 2023

Source: VDMA / Federal Statistical Office

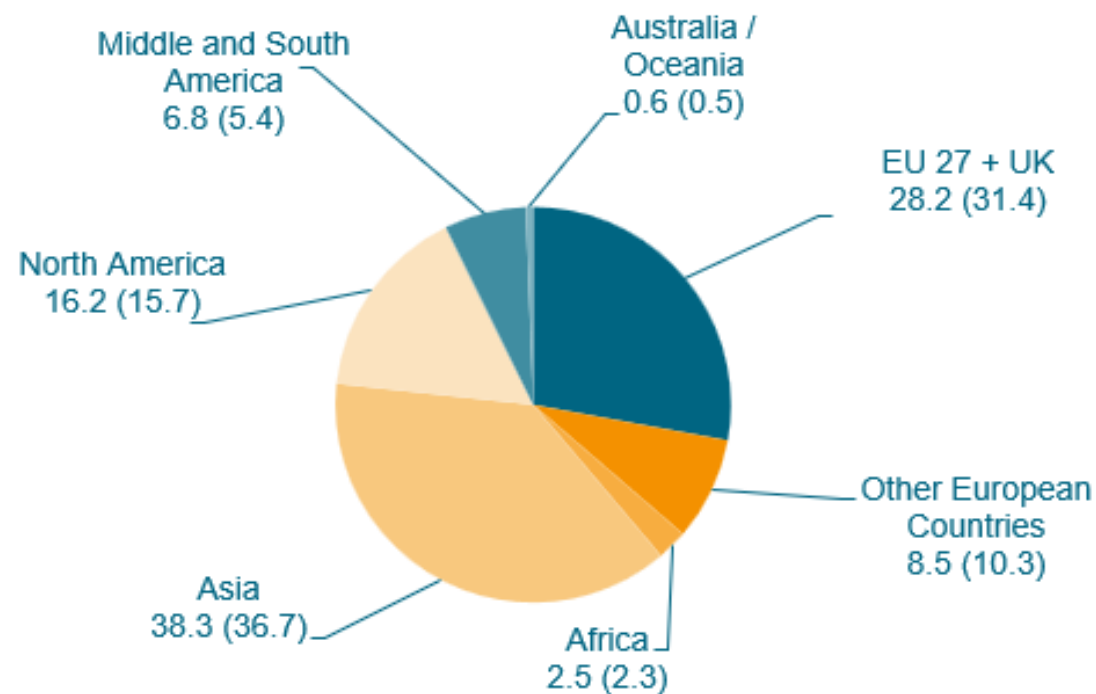
Germany still number 2 in world exports behind China

Year	World Export* (m €)	Shares of particular countries (%)					USA
		EU27+UK	Germany	China	Japan	Italy	
2017	23,736	52.2	22.7	15.1	9.5	8.8	5.3
2018	22,685	50.2	24.1	16.2	9.9	9.2	5.2
2019	23,017	48.0	22.5	19.5	10.1	9.0	4.8
2020	21,982	48.3	22.7	21.1	9.6	8.8	4.4
2021	23,713	46.7	22.0	23.8	9.1	8.6	4.5
2022	26,346	46.8	21.8	25.1	8.0	8.3	3.6
2023	28,007	48.4	22.0	24.4	8.2	9.0	3.6

Export to Regions 2023 (2022)

German Plastics and Rubber Machinery

Percentage shares



Core Machinery

Source: VDMA

TOP-10-Destinations 2023 (2022)

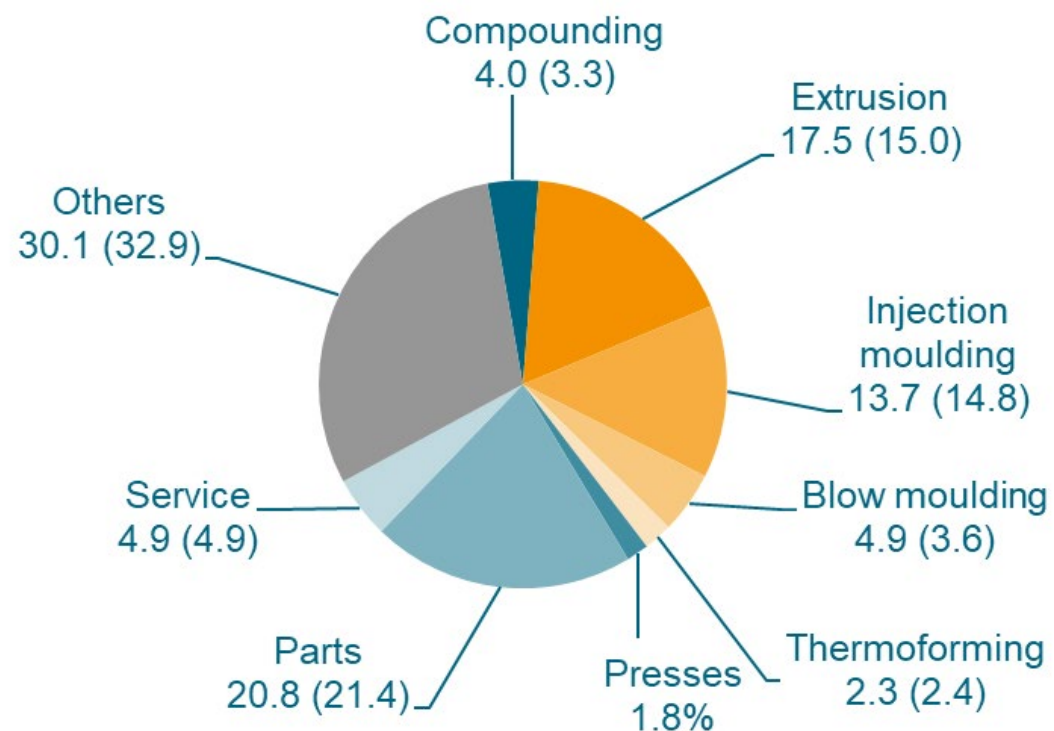


	2023 (m €)	2023/2022 (%)	Shares of Export (%)	Position	
				2023	2022
Export Total	6,169	7.2	100.0		
China	1,505	18.0	24.4	1	1
USA	961	13.2	15.6	2	2
Italy	268	-8.5	4.3	3	3
Mexico	238	49.1	3.9	4	7
Poland	227	16.1	3.9	5	5
France	186	16.1	3.0	6	6
Turkey	184	17.3	3.0	7	8
India	158	-40.0	2.6	8	4
Switzerland	119	-17.6	1.9	9	9
Czech Republic	117	-7.3	1.9	10	12

Production 2023 (2022)

Shares of Machinery Types

Percentage shares



Core Machinery

Source: VDMA

Current Situation



New Orders January – March 2024 / 2023:

» Total	- 17 %
– Domestic Market	- 40 %
– Export	- 11 %
– EURO-Countries	- 31 %

Forecast Turnover Germany price-adjusted



» 2024 - 5 to 0 %