

Review Plastics and Rubber Machinery

Stuttgart, 13./14th June 2019

2018 – Review



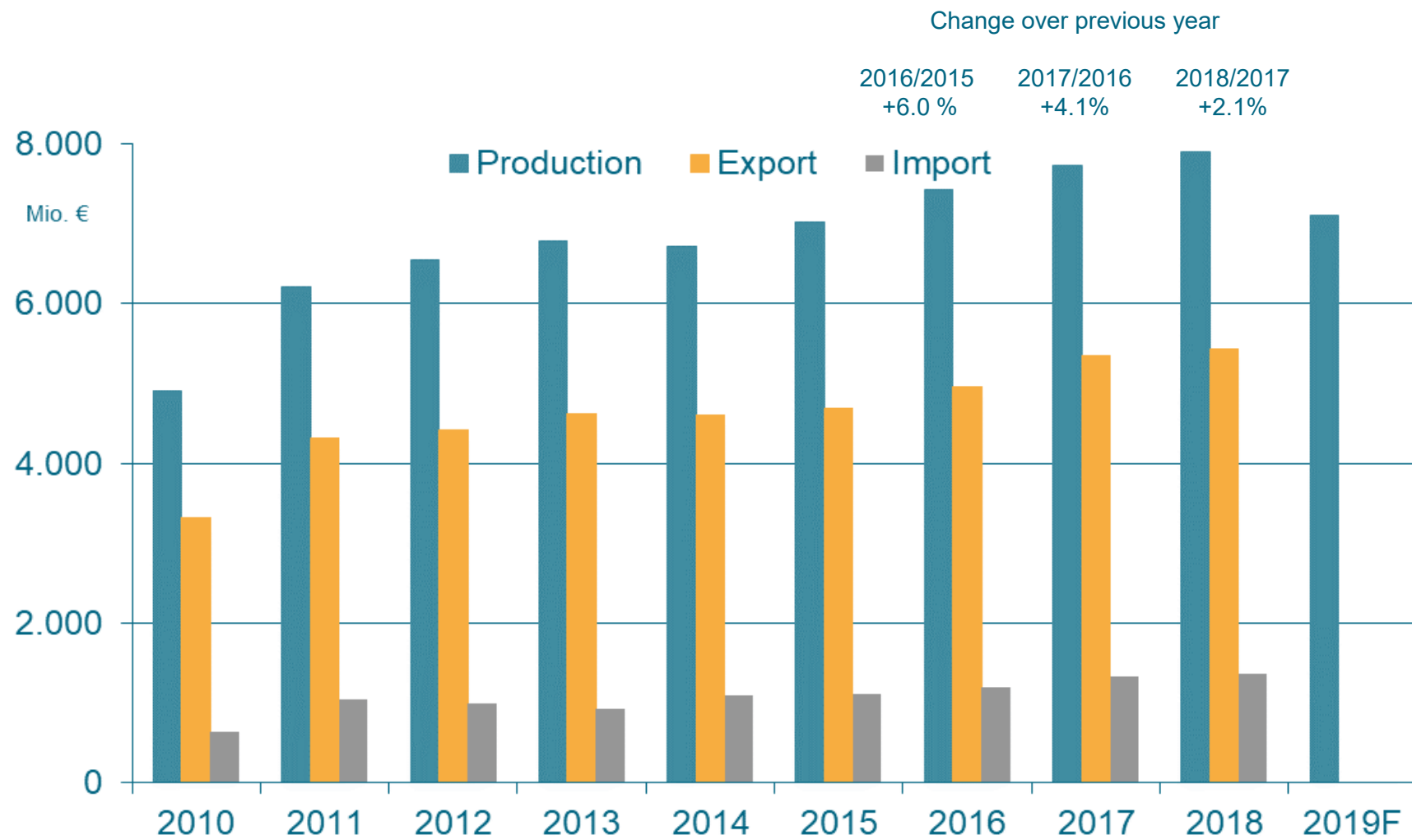
	<u>2016</u>	<u>2017</u>	<u>2018</u>
» New Orders: (Change in %)	6	18	-1
– Domestic Market:	7	14	-6
– Export Total:	6	19	1
– Euro-Countries:	14	6	-11
» Orders on Hand (Months):	9.3	9.5	10
» Capacity Utilisation (%):	92	94	93
» Production (m €): Change over previous year (%)	7,432 (6.0)	7,740 (4.1)	7,900 (2.1)
» Export (m €): Change over previous year (%)	4,963 (4.9)	5,299 (6.8)	5,429 (1.5)
» Export Share (%):	66.8	68.5	68.7

2018 – Review



	<u>2016</u>	<u>2017</u>	<u>2018</u>
» Import (m €):	1,201	1,305	1,367
Change over previous year (%)	(8.4)	(8.7)	(2.3)
» Trade Balance (m €):	3,762	3,994	4,062
Change over previous year (%)	(3.9)	(6.2)	(1.7)
» Domestic Market (m €):	3,670	3,746	3,838
Change over previous year (%)	(8.2)	(2.1)	(2.5)
» Share of Import in Domestic Market (%):	32.7	34.8	35.6
» Work Force*:	29,481	31,054	32,500

German Production – Export – Import



m €

2016: 7,432

2017: 7,734

2018: 7,900

2019F: 7,110

Core Machinery

F = Forecast

Source: VDMA

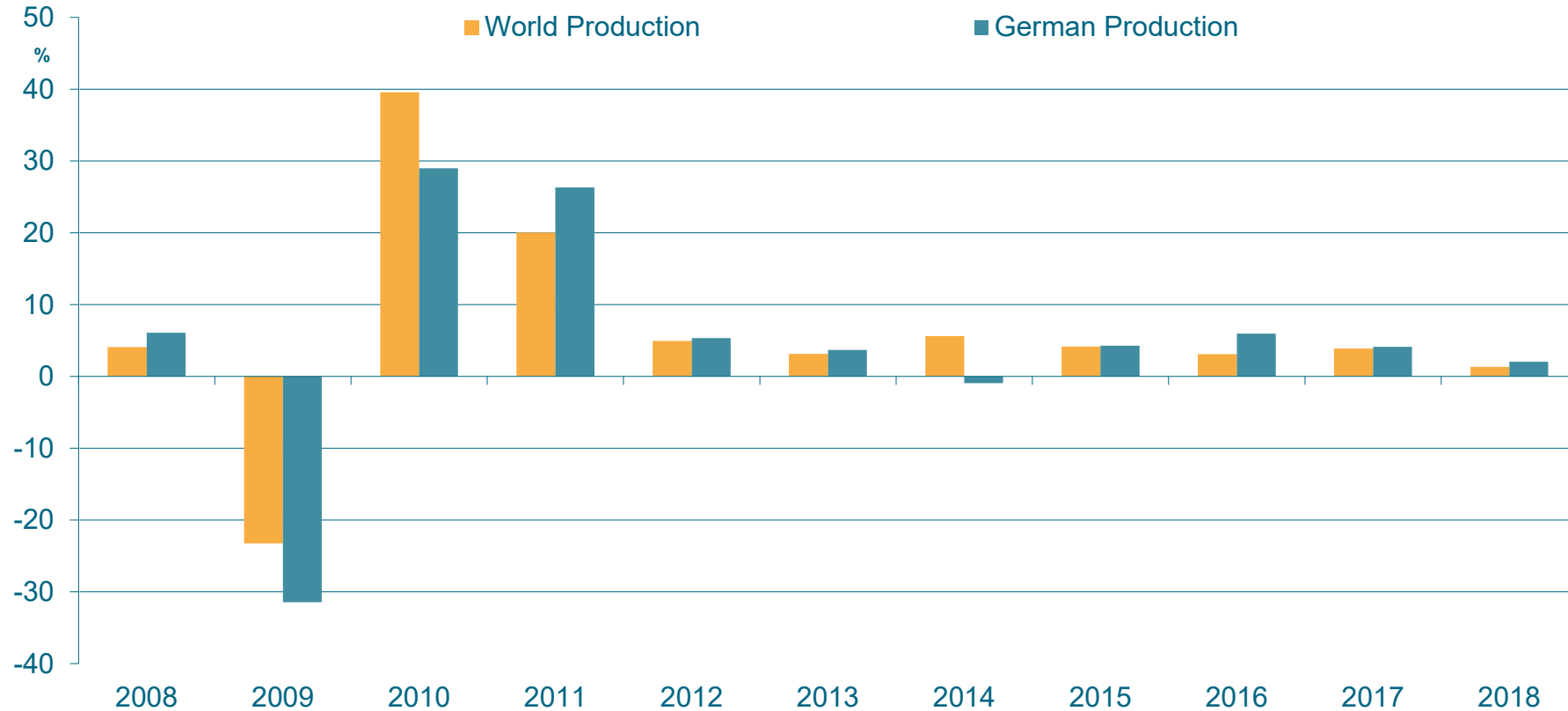
2018 – Review



	<u>2016</u>	<u>2017</u>	<u>2018</u>
» Core Machinery (m €):	7,432	7,740	7,900
Change over previous year (%)	(6.0)	(4.1)	(2.1)
» Moulds and Dies (m €):	2,350	2,569	2,628
Change over previous year (%)	(0.5)	(9.3)	(2.3)
» Resin and Parts Handling (m €):	867	920	1,020
Change over previous year (%)	(-2.1)	(6.1)	(10.9)
» Flexographic printing machines for films (m €):	306	290	271
Change over previous year (%)	(20.9)	(-5.5)	(-6.6)
» Total (m €):	10,953	11,519	11,819
Change over previous year (%)	(4.3)	(5.2)	(2.6)

Source: VDMA

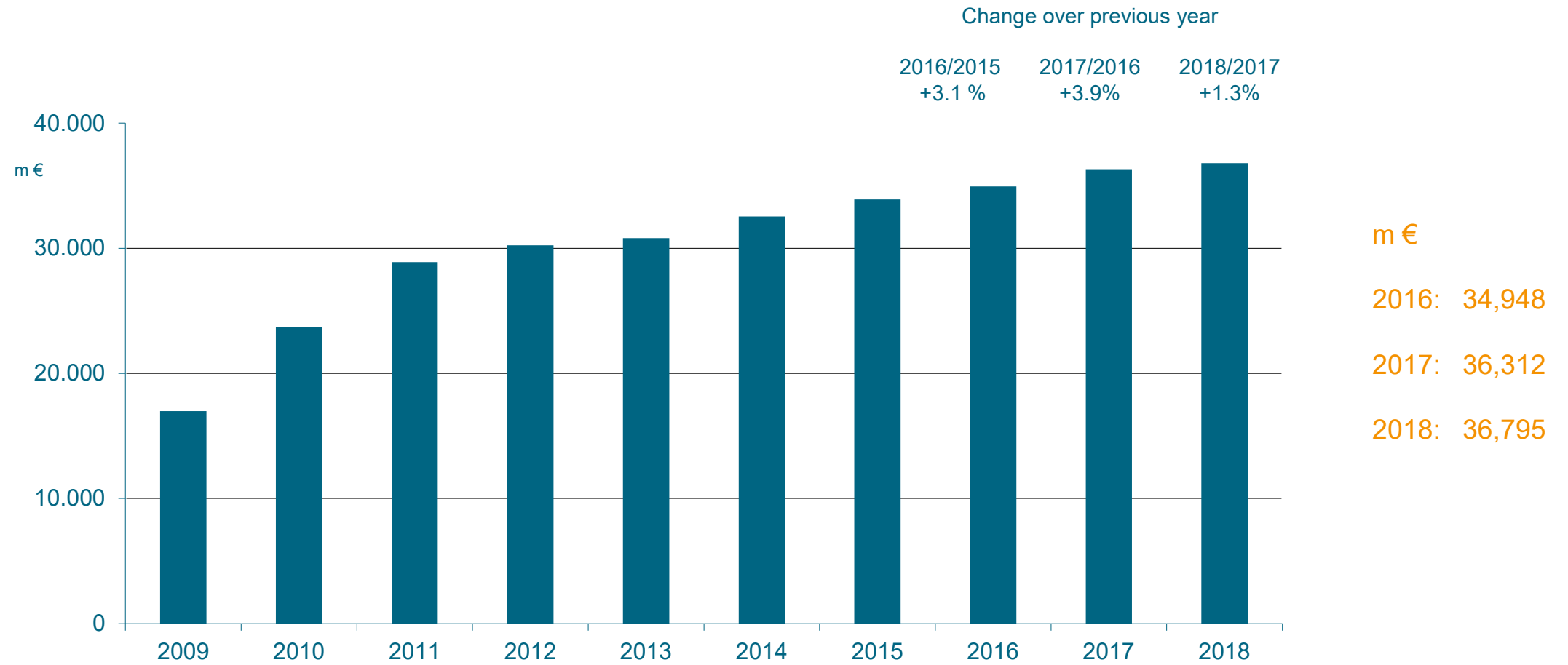
German and World Production



Core Machinery

Source: VDMA / Federal Statistical Office

World Production Plastics and Rubber Machinery



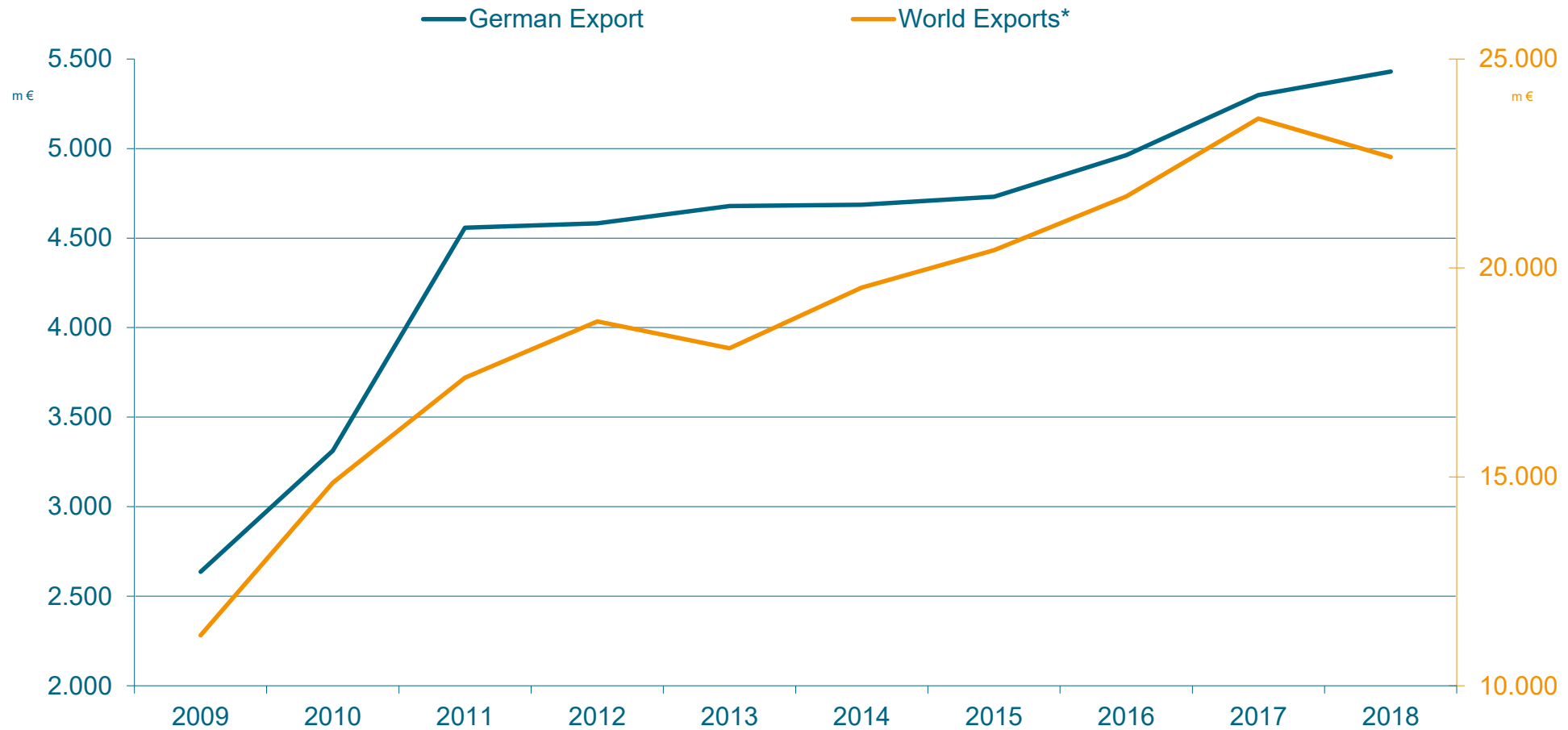
Core Machinery

Source: VDMA / Federal Statistical Office

World Production – Shares

Year	World Production* (m €)	Shares of particular countries (%)					
		EU 28	China	Germany	Italy	USA	Japan
2014	32,536	39.3	33.4	20.5	7.8	7.1	4.2
2015	33,896	39.8	32.5	20.7	7.8	7.2	4.5
2016	34,948	40.8	32.3	21.3	7.7	7.0	4.7
2017	36,312	42.0	31.8	22.1	8.4	7.4	4.9
2018	36,795	42.3	31.1	21.5	7.8	7.1	3.9

Still Number One in World Export



Core Machinery

*incl. Estimates for 2018

Source: VDMA / Federal Statistical Office

Still Number One in World Export



Year	World Export* (m €)	Shares of particular countries (%)					
		EU 28	Germany	China	Japan	Italy	USA
2014	19,527	54.6	24.0	12.7	9.0	9.0	5.9
2015	21,392	51.5	22.1	14.8	8.9	9.0	5.9
2016	21,718	51.9	22.9	14.6	8.9	8.8	5.8
2017	23,572	52.4	22.7	15.2	9.6	8.9	5.3
2018	22,656	50.1	24.0	16.2	9.9	9.2	5.2

Core Machinery

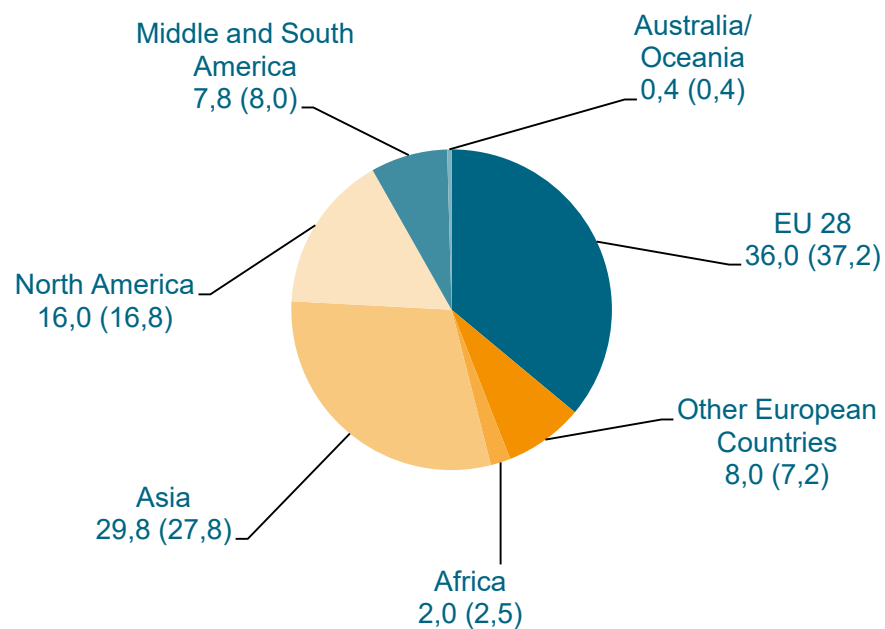
*incl. Estimates for 2018

Source: VDMA / Federal Statistical Office

Export to Regions 2018 (2017)

German Plastics and Rubber Machinery

Percentage shares



Core Machinery

Source: VDMA

TOP-10-Destinations 2018 (2017)

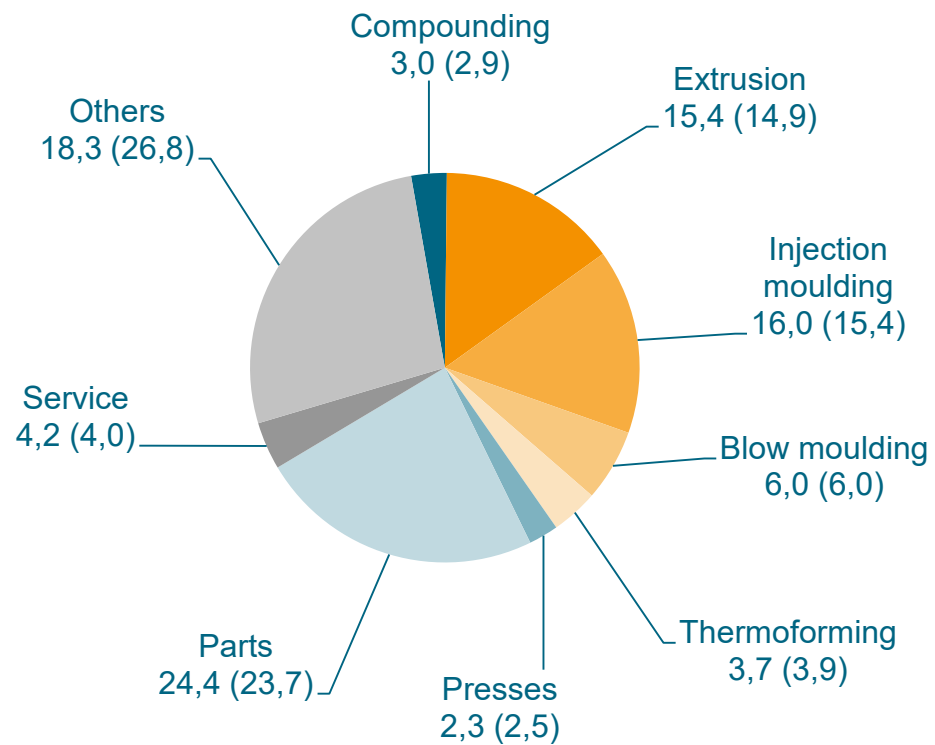


	2018 (m €)	2018/2017 (%)	Shares of Export (%)	Position	
				2018	2017
Export Total	5,429	1.5	100.0		
China	853.3	19.1	15.7	1	2
USA	820.1	-3.3	15.1	2	1
Polen	249.0	6.2	4.6	3	5
Italy	246.7	-1.5	4.5	4	4
Mexico	233.1	-13.3	4.3	5	3
France	209.0	9.1	3.8	6	6
Czech Republic	164.4	-6.3	3.0	7	7
Spain	159.5	14.4	2.9	8	10
India	144.3	-15.7	2.7	9	8
Great Britain	140.8	-3.0	2.6	10	9

Production 2018 (2017)

Shares of Machinery Types

Percentage shares



Core Machinery

Source: VDMA

Current Situation and Forecast



New Orders January – April 2019 / 2018:

» Total	-8 %
– Domestic Market	-13 %
– Export	-6 %
– EURO-Countries	-31 %

Forecast

» 2019: - 10 % Production value: 7.1 bn Euro

A vertical photograph on the left side of the slide shows a single water drop falling into a pool of water, creating concentric ripples. The background is a solid blue color.

Thank you
Thank you
for your attention