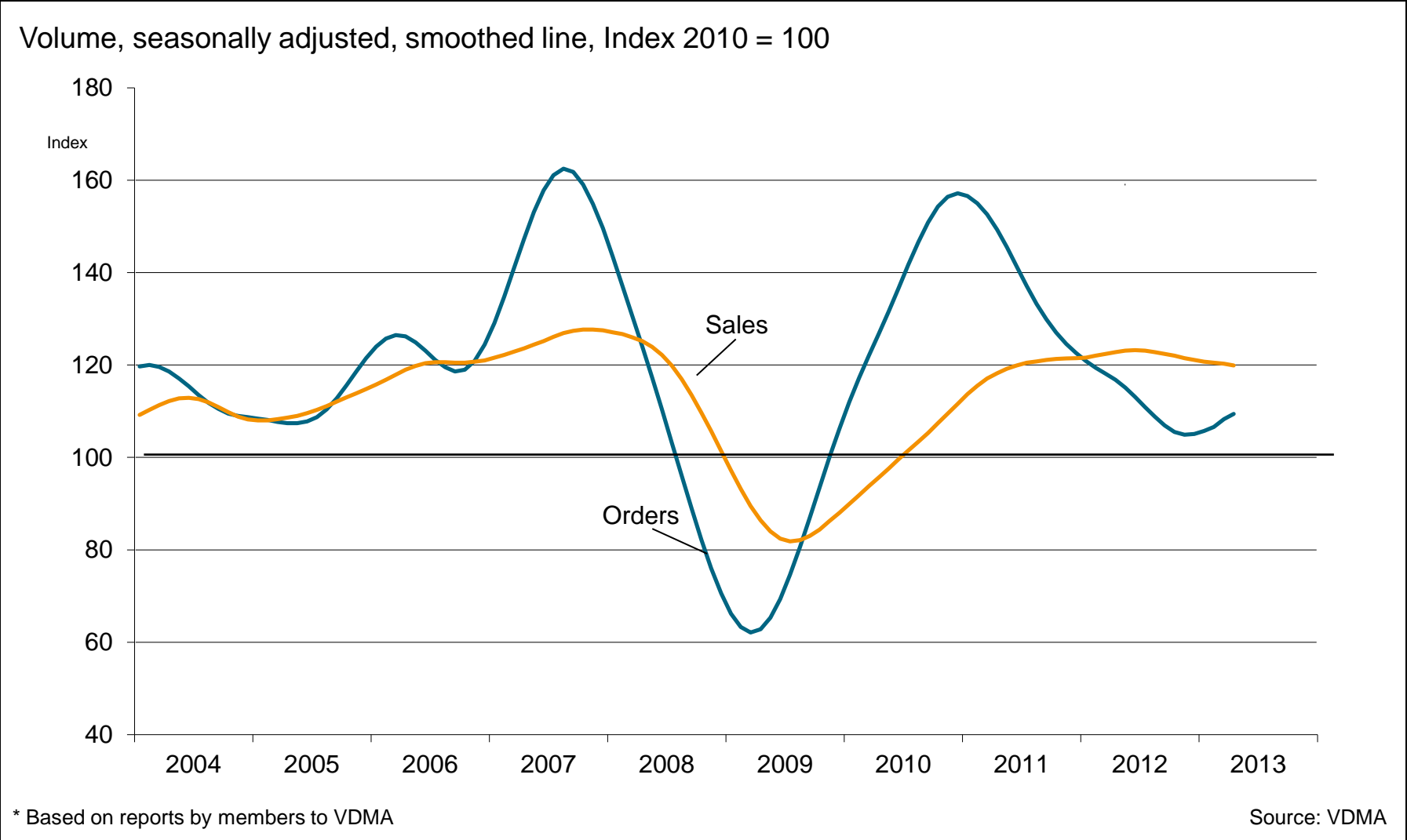


A vertical photograph on the left side of the slide shows a single water droplet falling into a pool of water, creating concentric ripples. The image is in a cool, blue-toned color palette.

Review Plastics and Rubber Machinery 2012



New Orders and Sales



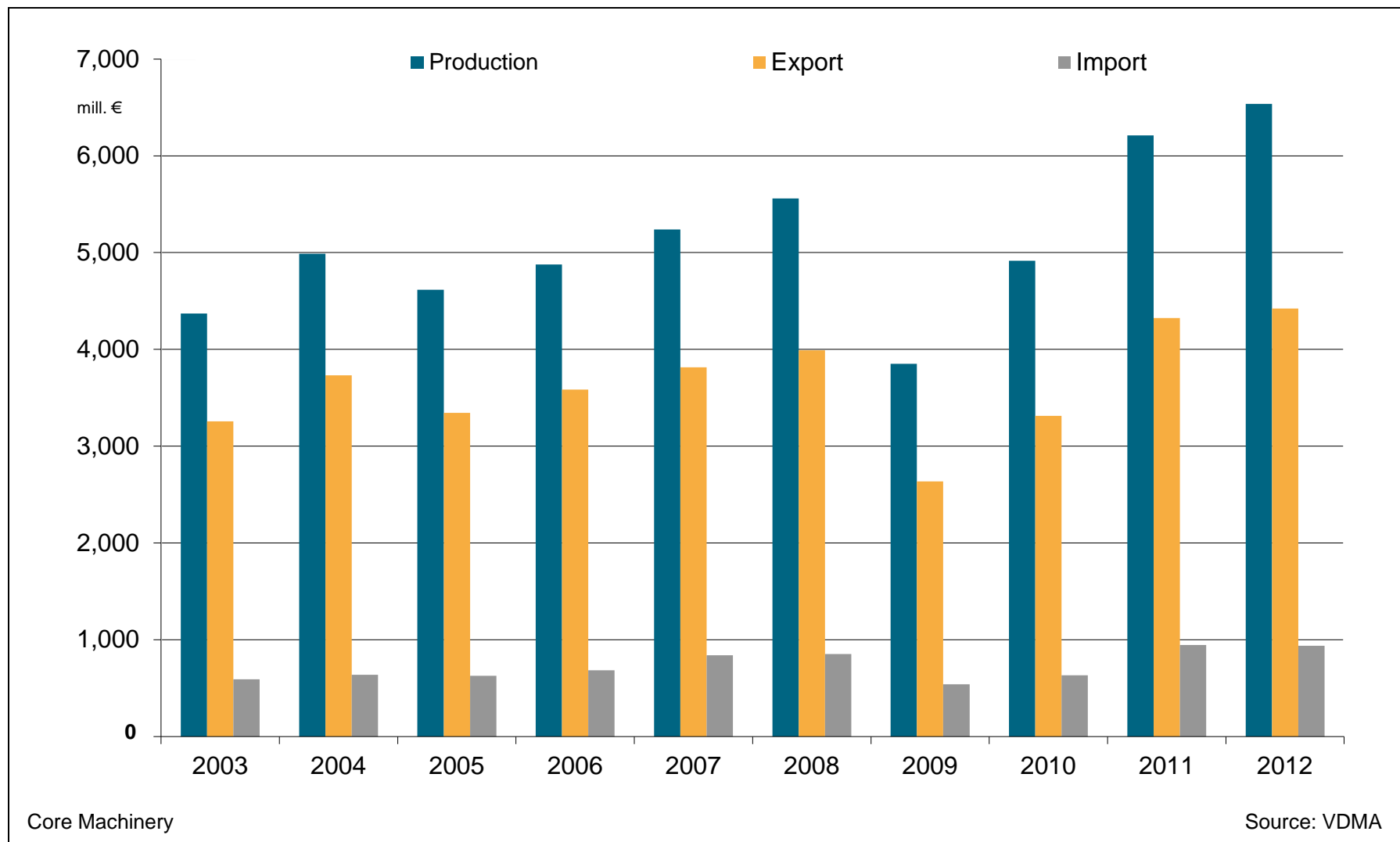
2012 – Review

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● New Orders:	75	3	-12
(Change in %)			
Domestic Market:	50	5	-13
Export Total:	86	2	-12
Euro-Countries:	48	7	-13
● Orders on Hand (Months):	6.7	7.2	6.8
● Capacity Utilisation (%):	88	92	91
● Production (Mio. €):	4,916	6,210	6,536
Change over previous year (%)	(27.7)	(26.3)	(5.2)
● Export (Mio. €):	3,312	4,324	4,423
Change over previous year (%)	(25.6)	(30.5)	(2.3)
● Export Share (%):	67.4	69.7	67.7

2012 - Review

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Import (Mio. €):	633	946	938
Change over previous year (%)	(17.5)	(49.5)	(-0.9)
● Trade Balance (Mio. €):	2,679	3,377	3,485
Change over previous year (%)	(27.7)	(26.1)	(3.2)
● Domestic Market (Mio. €):	2,237	2,823	3,051
Change over previous year (%)	(27.6)	(26.6)	(7.7)
● Share of Import in Domestic Market (%):	28.3	33.4	30.7
● Work Force	25,713	27,000	27,300

Production - Export - Import

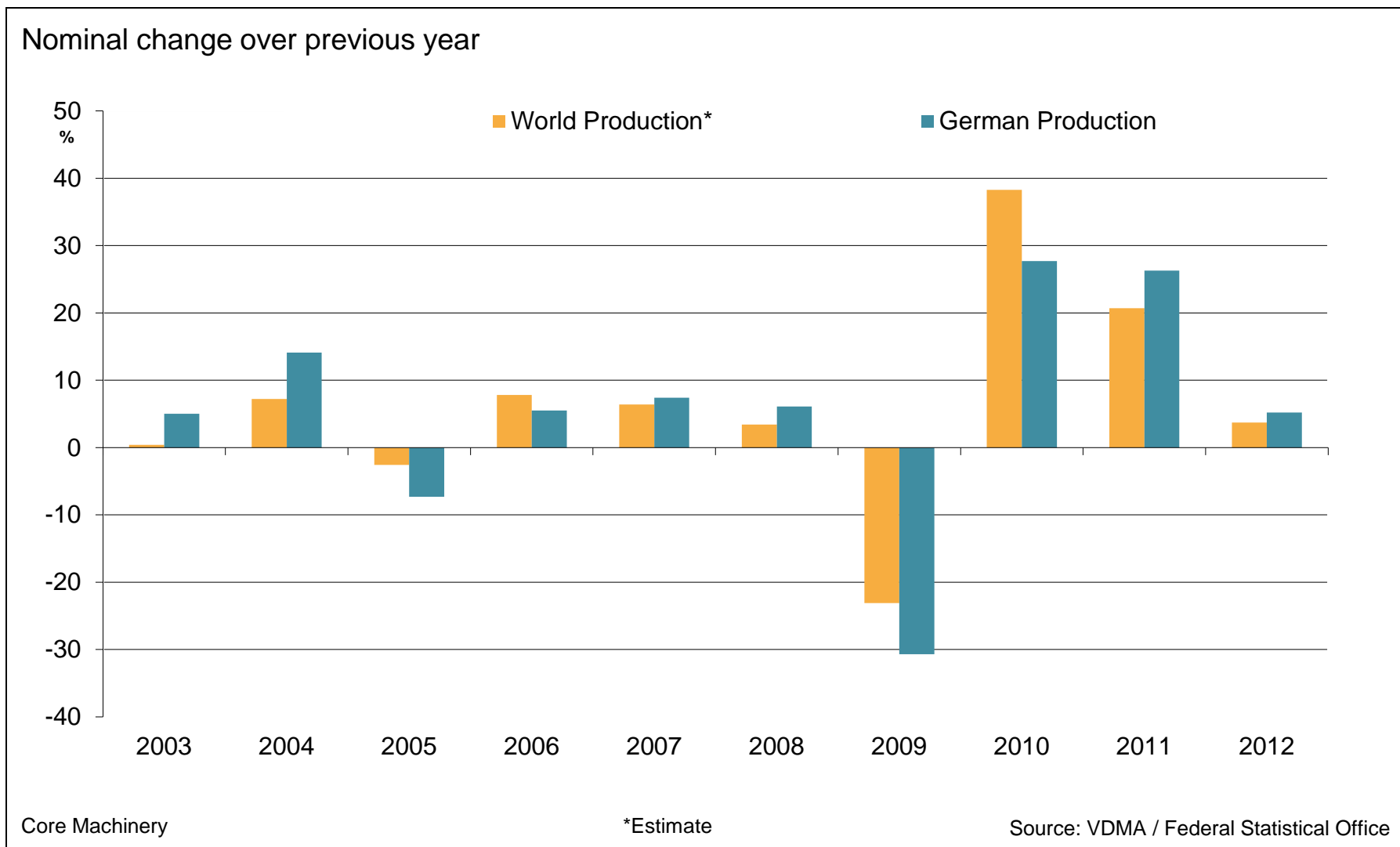


2012 - Review

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Core Machinery (Mio. €):	4,916	6,210	6,536
Change over previous year (%)	(27.7)	(26.3)	(5.2)
● Moulds and Dies (Mio. €):	1,715	1,969	2,008
Change over previous year (%)	(-5.4)	(14.8)	(2.0)
● Resin and Parts´ Handling (Mio. €):	635	725	753
Change over previous year (%)	(17.6)	(14.2)	(4,4)
● Flexographic printing machines for films (Mio. €):	178	198	167
Change over previous year (%)	(28.3)	(10.9)	(-15.4)
● Total (Mio. €):	7,444	9,090	9.464
Change over previous year (%)	(17.4)	(22.1)	(4,1)

Source: VDMA

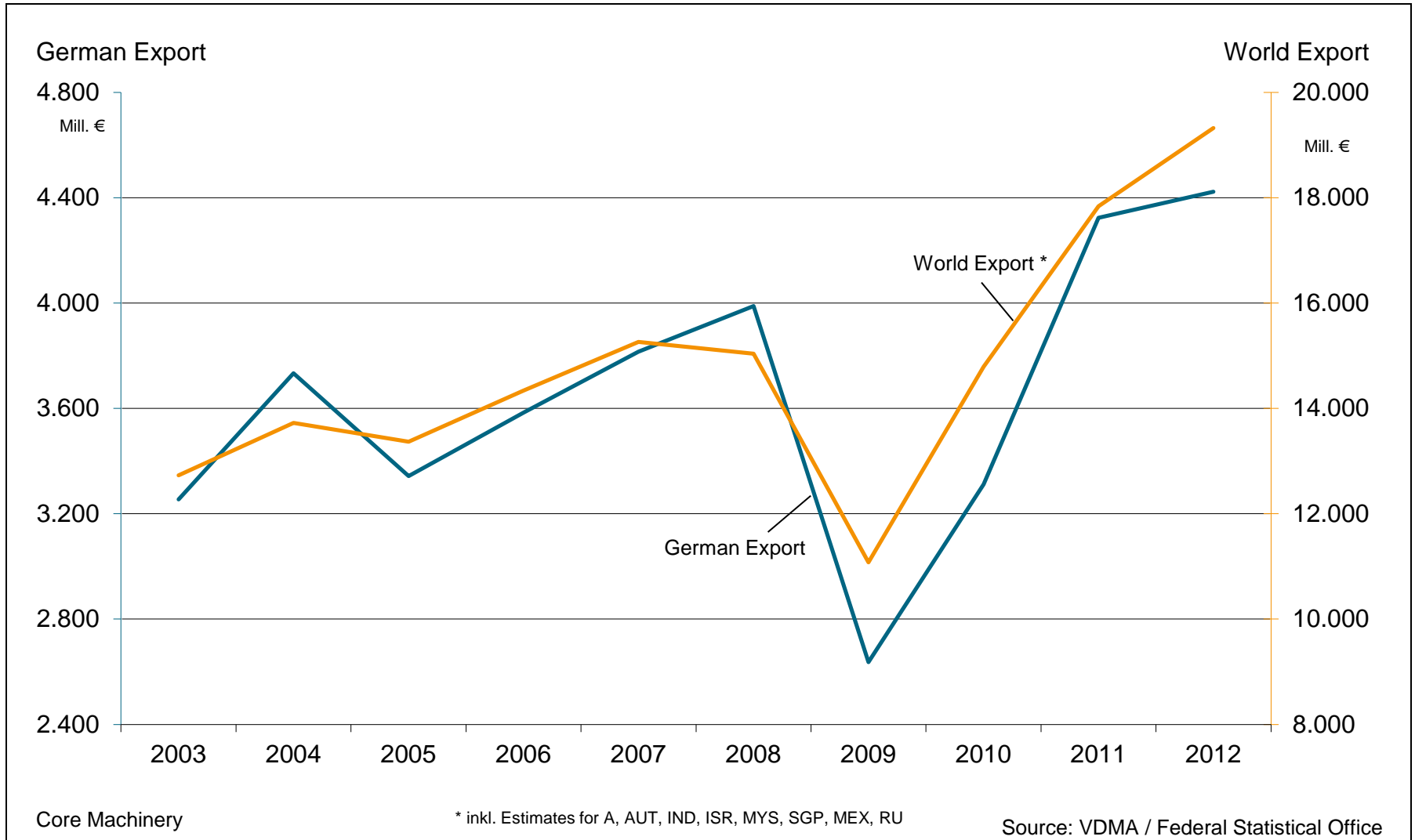
German and World Production



TOP 5 in World Production

Year	World Production* (Mio. €)	Shares of particular countries (%)				
		China	Germany	Italy	USA	Japan
2008	21,985	19.0	25.3	11.9	7.2	6.0
2009	16,903	23.5	22.6	12.1	6.5	4.1
2010	23,371	29.3	21.0	9.6	5.4	5.4
2011	28,215	30.5	22.0	8.8	6.5	5.5
2012	29,254	29.4	22.3	8.5	6.5	6.1

Still Number One in World Export

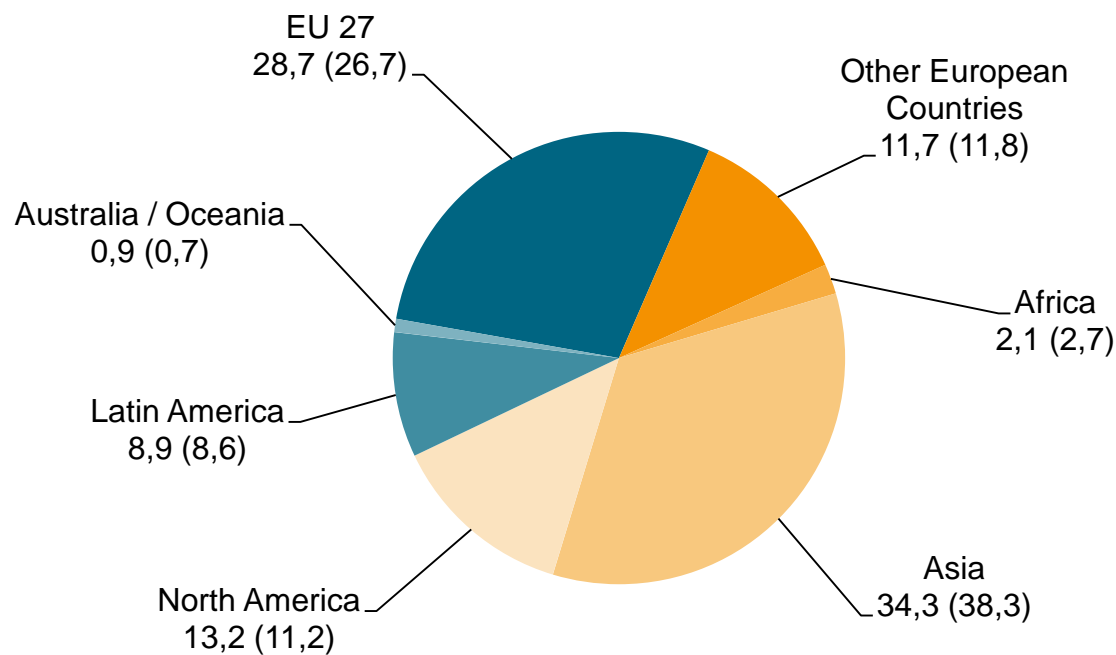


Still Number One in World Export

Year	World Export (Mio. €)	Shares of particular countries (%)				
		Germany	Japan	China	Italy	USA
2008	15,037	26.5	11.2	8.6	11.7	5.9
2009	11,078	23.8	10.5	8.8	10.9	7.3
2010	14,793	22.4	12.4	10.0	9.1	6.4
2011	17,835	24.2	11.4	10.3	9.4	5.8
2012	19,322 *	22.9	12.9	11.6	8.9	6.1

Export to Regions 2012 (2011)

Percentage shares



Export to European Markets

	<u>2010</u>	<u>2011</u>	<u>2012</u>
EU-27-Countries			
● Shares(%) :	27.4	26.7	28.7
● Value (Mio. €) :	909	1,153	1,271
Change over previous year (%)	(16.3)	(26.9)	(10.2)
Other European Countries			
● Shares (%) :	11.3	11.8	11.7
● Value (Mio. €) :	374	511	519
Change over previous year (%)	(16.6)	(36.7)	(1.5)

Export to the Americas

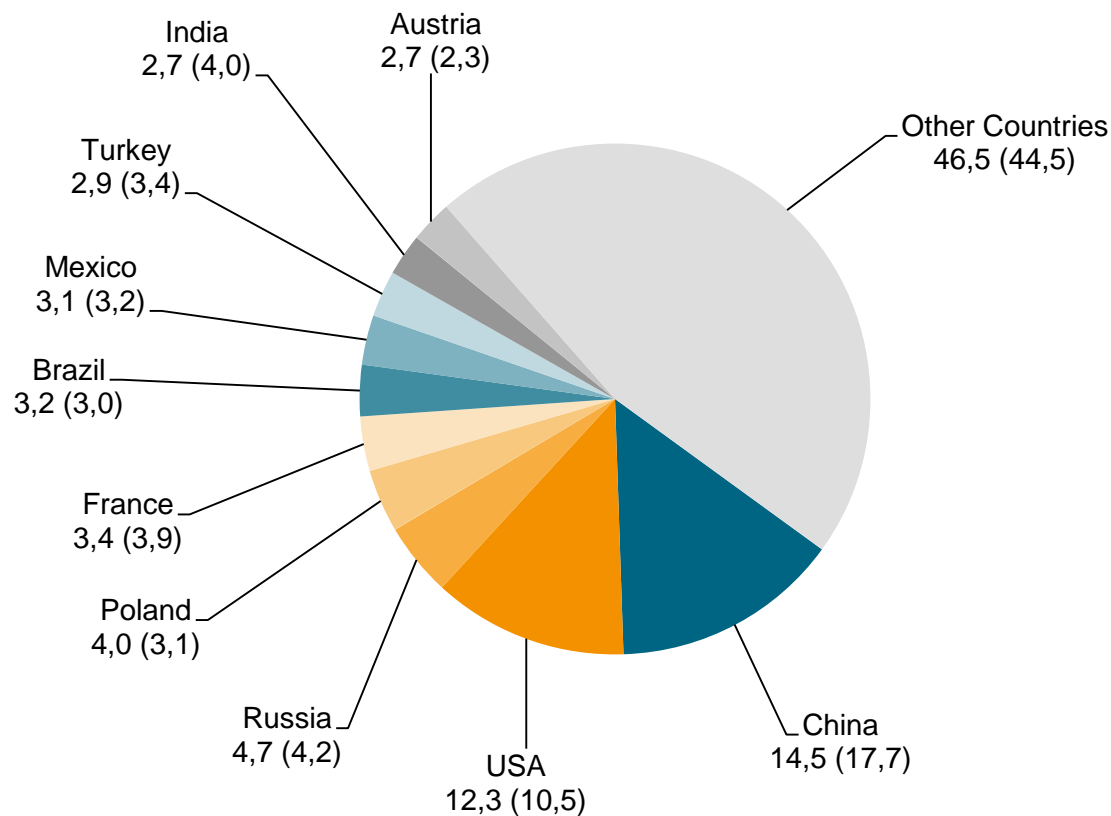
	<u>2010</u>	<u>2011</u>	<u>2012</u>
North America			
● Shares (%):	11.1	11.2	13.2
● Value (Mio. €):	369	483	583
Change over previous year (%)	(30.3)	(30.7)	(20.9)
Thereof:			
● USA (Mio. €):			
Change over previous year (%)	338 (31.2)	454 (34.2)	546 (20.2)
Central- and South America			
● Shares (%):	8.4	8.6	8.9
● Value (Mio. €):	277	373	395
Change over previous year (%)	(46.0)	(34.8)	(5.8)

Export to Asia

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Shares (%) :	37.8	38.3	34.3
● Value (Mio. €) :	1,253	1,658	1,519
Change over previous year (%)	(30.1)	(32.4)	(-8.4)
Thereof:			
Saudi-Arabia (Mio. €) :	62	55	71
Change over previous year (%)	(-4.6)	(-11.4)	(28.0)
India (Mio. €) :	141	175	118
Change over previous year (%)	(7.5)	(24.1)	(-32.8)
ASEAN (Mio. €) :	166	204	293
Change over previous year (%)	(3.6)	(23.0)	(43.5)
China (Mio. €) :	587	766	640
Change over previous year (%)	(64.4)	(30.5)	(-16.4)

Exports to Major Destinations 2012 (2011)

Percentage shares



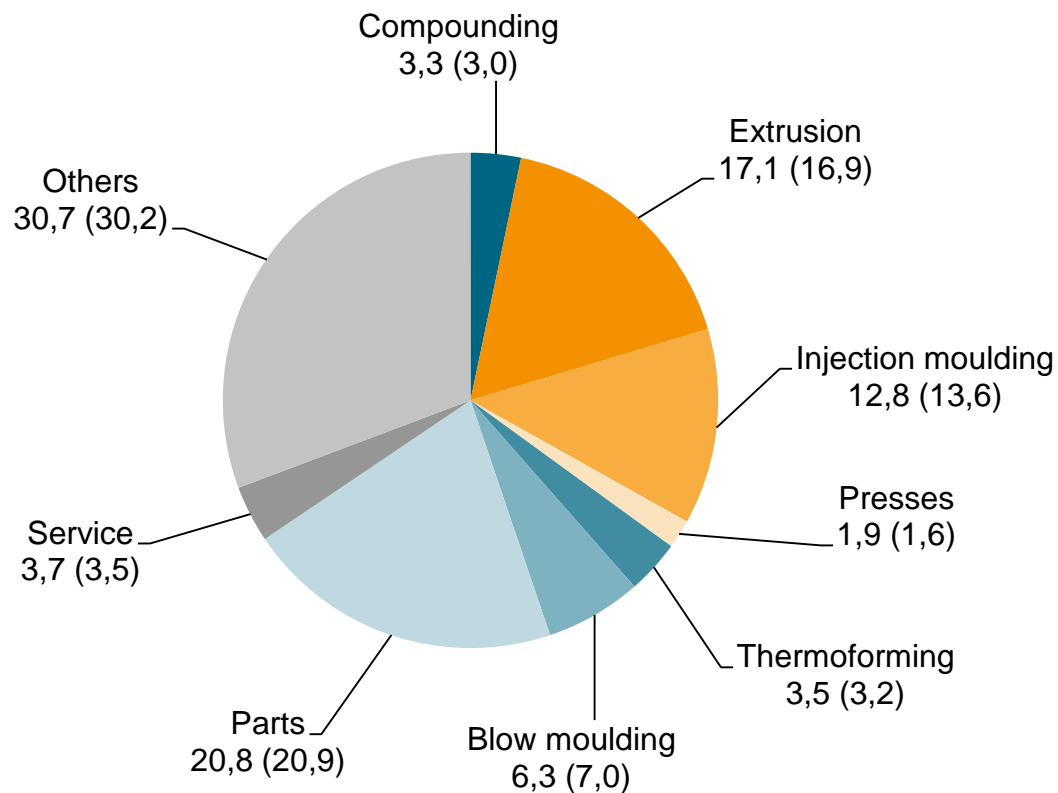
TOP-10- Destinations 2012 (2011)

	2012 (Mio. €)	2012 / 2011 (%)	Shares of Export (%)	Position	
				2012	2011
Total Export	4.423	2.3	100.0		
China	640	-16.4	14.5	1	1
USA	546	20.2	12.3	2	2
Russia	206	12.1	4.7	3	3
Poland	176	30.0	4.0	4	9
France	153	-9.5	3.4	5	5
Brazil	143	9.9	3.2	6	11
Mexico	139	0.5	3.1	7	8
Turkey	130	-12.2	2.9	8	7
India	118	-32.8	2.7	9	4
Austria	117	16.9	2.7	10	13

Production 2012 (2011)

Shares of Machinery Types

Percentage shares



Injection Moulding Machines

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Production (Mio. €):	638	846	834
Change over previous year (%)	(60.5)	(32.5)	(-1.3)
● Share in Production Total (%):	13.0	13.6	12.8
● Export (Mio. €):	593	739	776
Change over previous year (%)	(55.2)	(24.5)	(5.1)
● Export share (%):	93.0	87.4	93.0

Extruders and Extrusion Lines

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Production (Mio. €):	912	1,048	1,117
Change over previous year (%)	(28.8)	(15.0)	(6.6)
● Share in Production Total (%):	18.6	16.8	17.1
● Export (Mio. €):	438	658	557
Change over previous year (%)	(-1.7)	(50.1)	(-15.3)
● Export share (%):	48.1	63.1	49.9

Blow Moulding Machines

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Production (Mio. €):	374	435	411
Change over previous year(%)	(35.6)	(16.3)	(-5.7)
● Share in Production Total (%):	7.6	7.0	6.3
● Export (Mio. €):	284	322	316
Changes over previous year (%)	(37.6)	(13.4)	(-2.0)
● Export share (%):	76.0	74.1	76.9

Vacuumforming and Other Thermoforming Machines

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Production (Mio. €):	158	198	230
Change over previous year (%)	(32.4)	(24.9)	(16.3)
● Share in Production Total (%):	3.2	3.2	3.5
● Export (Mio. €):	130	154	180
Change over previous year (%)	(38.8)	(17.7)	(17.3)
● Export share (%):	82.5	77.8	78.4

Presses

	<u>2010</u>	<u>2011</u>	<u>2012</u>
● Production (Mio. €):	103	98	121
Change over previous year (%)	(5.6)	(-4.3)	(23.6)
● Share in Production Total (%):	2.1	1.6	1.9
● Export (Mio. €):	30	49	84
Change over previous year (%)	(-48.2)	(66.1)	(71.1)
● Export share (%):	28.8	50.0	69.1

Situation and Forecast

- **New Orders January – April 2013 / 2012:**

- Total - 13 %
 - Domestic Market - 18 %
 - Export - 12 %
 - EURO- Countries 8 %

- **Forecast**

- 2012: -1 % Production value: 6.5 bn Euro
- 2013 6 % Production value: 6.9 bn Euro
- Update every six months

Forecast 2013

- Exports to emerging markets: Growth after a decrease in 2012
- Exports to Central and Eastern Europe continue to grow at dimmed rates
- Exports to EURO Zone still weak
- Exports to North America rather stagnant following strong growth in 2012
- Domestic shipments dwindling; rock-bottom to be hit in second quarter

Forecast 2014

- Exports to all regions – including Western Europe- to grow
- Domestic sales with positive growth rates

A vertical photograph on the left side of the page shows a single water droplet suspended in mid-air just above a surface of water. The droplet is perfectly spherical and reflects light, creating a bright highlight. Below it, concentric ripples spread out across the water's surface, and a faint reflection of the droplet is visible on the water's surface.

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