

# Review Plastics and Rubber Machinery

Linz, 14./15th June 2018

# 2017 – Review



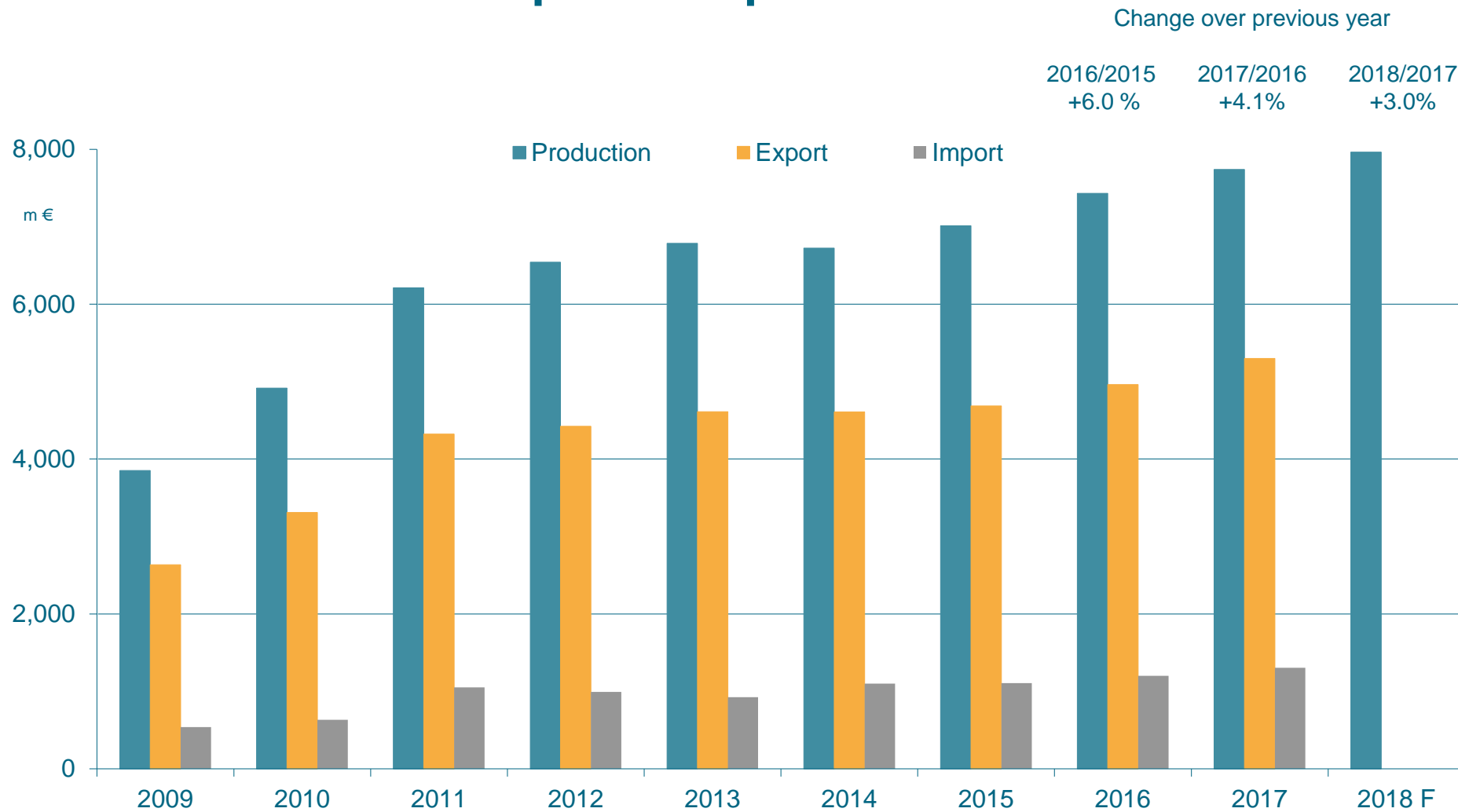
	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>New Orders:</b> (Change in %)	10	6	<b>18</b>
– <b>Domestic Market:</b>	-5	7	<b>14</b>
– <b>Export Total:</b>	15	6	<b>19</b>
– <b>Euro-Countries:</b>	17	14	<b>6</b>
» <b>Orders on Hand (Months):</b>	8.7	9.3	<b>9.5</b>
» <b>Capacity Utilisation (%):</b>	87	92	<b>94</b>
» <b>Production (m €):</b> Change over previous year (%)	7,013 (4.3)	7,432 (6.0)	<b>7,740</b> (4.1)
» <b>Export (m €):</b> Change over previous year (%)	4,730 (0.9)	4,963 (4.9)	<b>5,299</b> (6.8)
» <b>Export Share (%):</b>	67.4	66.8	<b>68.5</b>

# 2017 – Review



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Import (m €):</b>	1,108	1,201	<b>1,305</b>
Change over previous year (%)	(0.6)	(8.4)	(8.7)
» <b>Trade Balance (m €):</b>	3,622	3,762	<b>3,994</b>
Change over previous year (%)	(1.0)	(3.9)	(6.2)
» <b>Domestic Market (m €):</b>	3,391	3,670	<b>3,746</b>
Change over previous year (%)	(8.0)	(8.2)	(2.1)
» <b>Share of Import in Domestic Market (%):</b>	32.7	32.7	<b>34.8</b>
» <b>Work Force*:</b>	28,750	29,481	<b>31,054</b>

# German Production – Export – Import



m €

2016: 7,432

2017: 7,740

2018E: 7,972

Core Machinery

F= Forecast

Source: VDMA

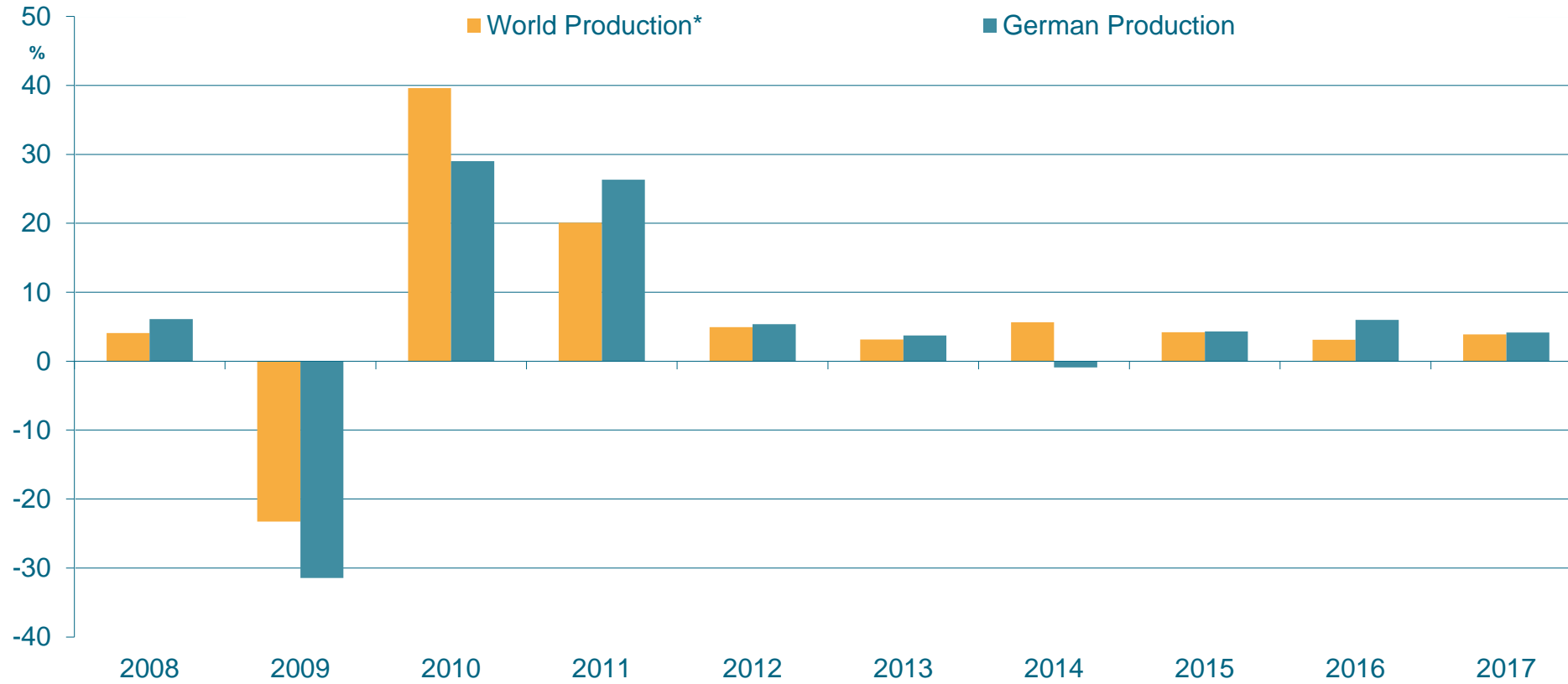
# 2017 – Review



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Core Machinery</b> (m €):	7,013	7,432	<b>7,740</b>
Change over previous year (%)	(4.3)	(6.0)	(4.1)
» <b>Moulds and Dies</b> (m €):	2,339	2,350	<b>2,569</b>
Change over previous year (%)	(2.3)	(0.5)	(9.3)
» <b>Resin and Parts Handling</b> (m €):	886	867	<b>920</b>
Change over previous year (%)	(6.7)	(-2.1)	(6.1)
» <b>Flexographic printing machines for films</b> (m €):	253	306	<b>290</b>
Change over previous year (%)	(10.4)	(20.9)	(-5.5)
» <b>Total</b> (m €):	10,505	10,953	<b>11,519</b>
Change over previous year (%)	(5.0)	(4.3)	(5.2)

Source: VDMA

# German and World Production



Core Machinery

\*Estimate

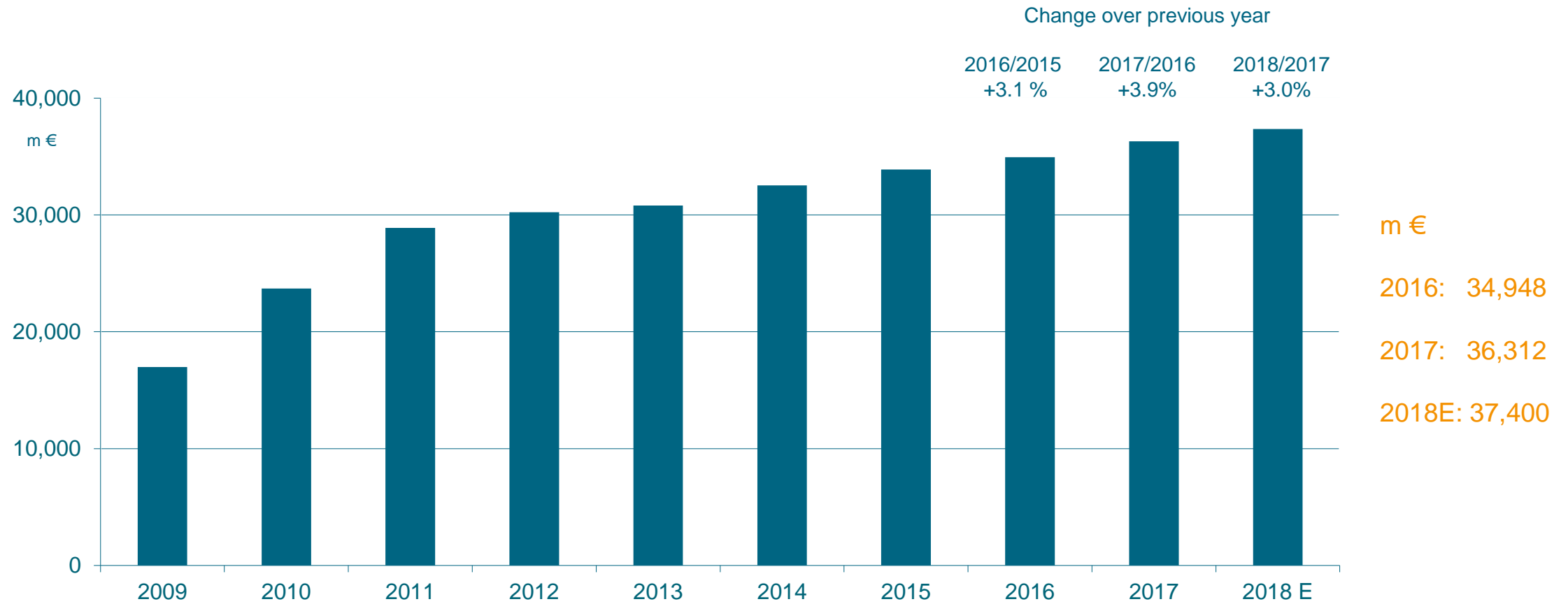
Source: VDMA / Federal Statistical Office

# World Production – Shares



Year	World Production* (m €)	Shares of particular countries (%)					
		EU 28	China	Germany	Italy	USA	Japan
2013	30,802	48.2	30.2	22.1	8.1	7.1	4.4
2014	32,536	43.2	33.4	20.5	7.8	7.1	4.2
2015	33,896	39.5	32.5	20.7	7.8	7.2	4.5
2016	34,948	37.8	32.3	21.3	7.7	7.0	4.7
<b>2017</b>	<b>36,312</b>	37.0	31.8	22.1	8.4	7.4	4.9

# World Production Plastics and Rubber Machinery



Core Machinery

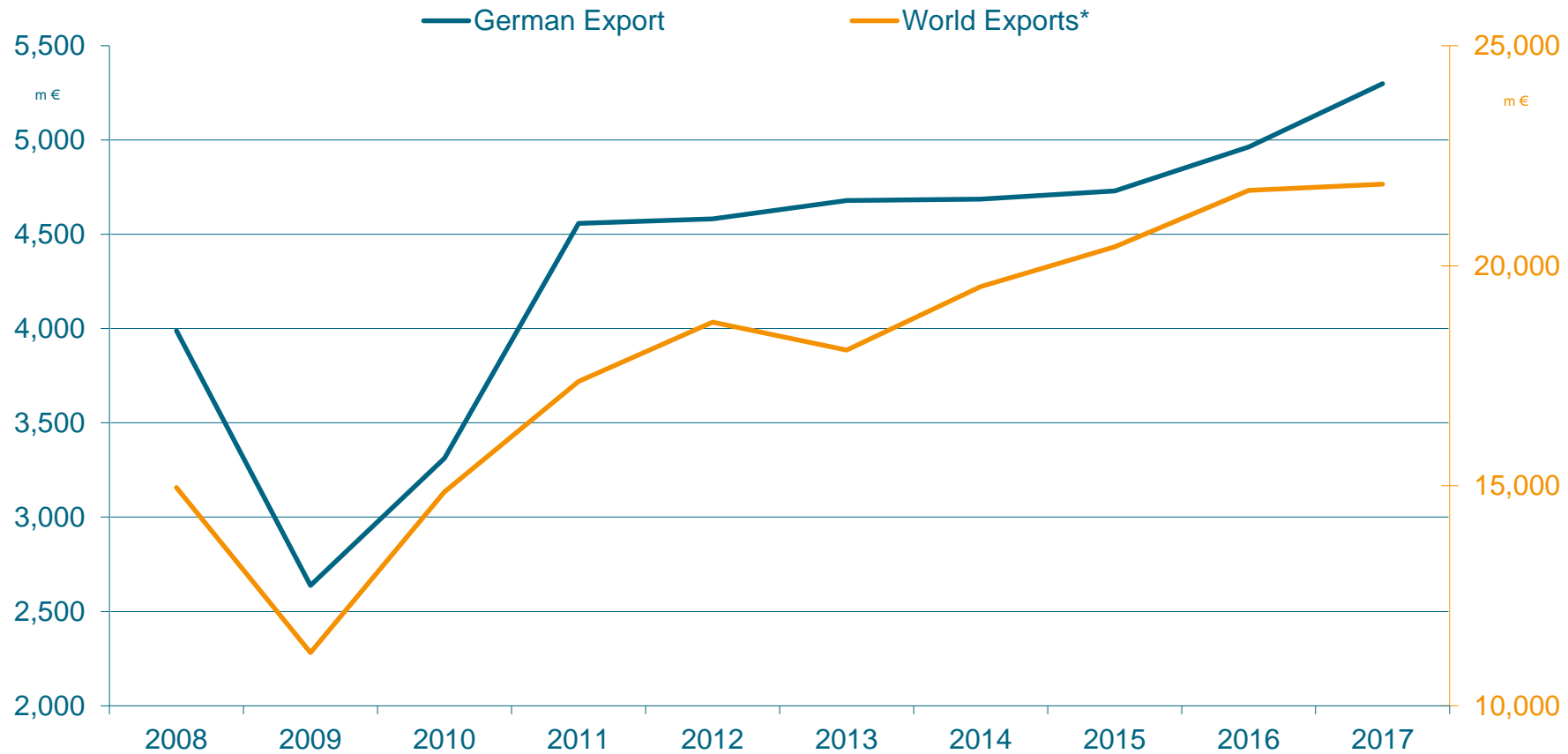
\*Estimate

Forecast for 2018

Source: VDMA / Federal Statistical Office



# Still Number One in World Export



Core Machinery

\*incl. Estimates for 2017

Source: VDMA / Federal Statistical Office

## Still Number One in World Export



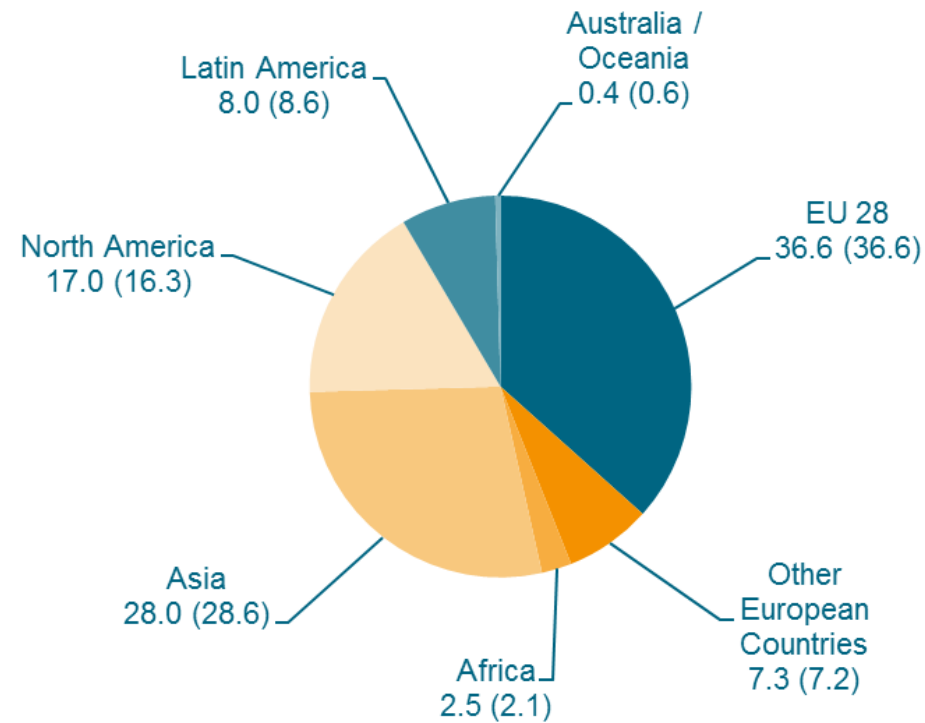
Year	World Export (m €)	Shares of particular countries (%)					
		EU 28	Germany	China	Japan	Italy	USA
2013	18,080	51.7	25.9	12.8	10.3	9.4	6.0
2014	19,527	54.6	24.0	12.7	9.0	9.0	5.9
2015	20,427	49.2	23.2	15.5	9.3	9.5	6.2
2016	21,710	51.9	22.9	14.6	8.9	8.8	5.8
<b>2017*</b>	<b>21,854</b>	57.0	24.4	16.5	10.4	9.7	5.8

# Export to Regions 2017 (2016)

## German Plastics and Rubber Machinery



Percentage shares



Core Machinery

Source: VDMA

# Export to European Markets

## German Plastics and Rubber Machinery



	<u>2015</u>	<u>2016</u>	<u>2017</u>
<b>EU-28-Countries</b>			
» <b>Shares (%)</b> :	35.8	36.6	<b>36.6</b>
» <b>Value (m €)</b> :	1,693	1,816	<b>1,940</b>
Change over previous year (%)	(1.1)	(7.3)	(6.8)
<b>Other European Countries</b>			
» <b>Shares (%)</b> :	8.8	7.2	<b>7.3</b>
» <b>Value (m €)</b> :	416	357	<b>389</b>
Change over previous year (%)	(-19.2)	(-14.1)	(9.0)

# Export to the Americas

## German Plastics and Rubber Machinery



	<u>2015</u>	<u>2016</u>	<u>2017</u>
<b>North America</b>			
» <b>Shares (%)</b> :	16.4	16.3	<b>17.0</b>
» <b>Value (m €)</b> :	778	810	<b>899</b>
Change over previous year (%)	(13.5)	(4.2)	(10.9)
<b>Thereof:</b>			
<b>USA (m €)</b> :	719	770	<b>847</b>
Change over previous year (%)	(14.1)	(7.1)	(10.1)
<b>Central- and South America</b>			
» <b>Shares (%)</b> :	5.4	7.2	<b>8.1</b>
» <b>Value(m €)</b> :	356	427	<b>426</b>
Change over previous year (%)	(39.4)	(20.0)	(-0.1)

# Export to Asia

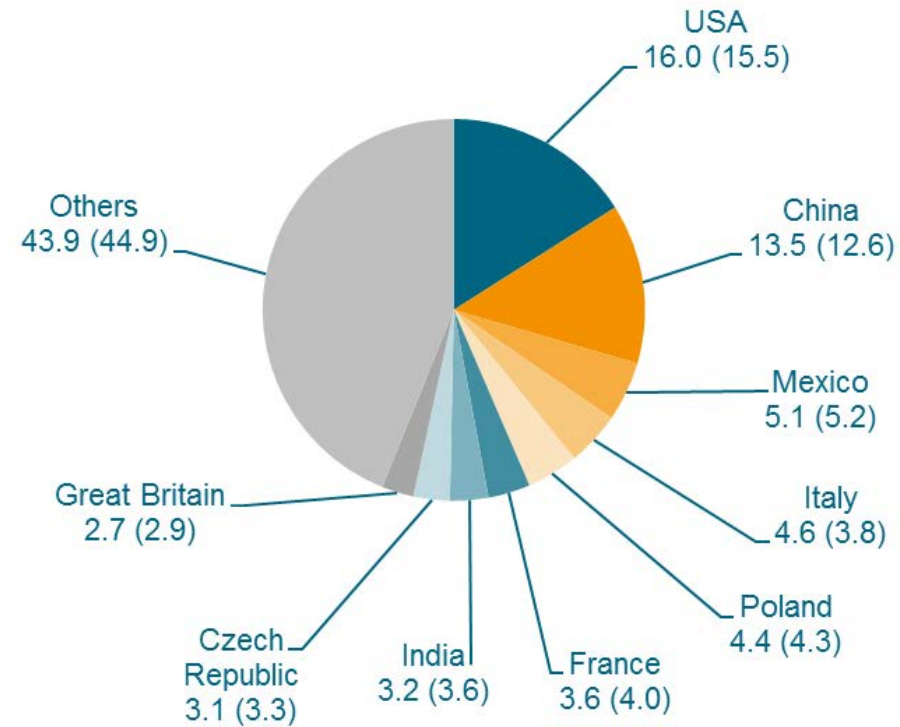
## German Plastics and Rubber Machinery



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Shares (%)</b> :	30.7	27.6	<b>26.8</b>
» <b>Value (m €)</b> :	1,371	1,419	<b>1,486</b>
Change over previous year (%)	(-5.5)	(3.6)	(4.7)
<b>Thereof:</b>			
<b>Saudi-Arabia (m €)</b> :	80	67	<b>24</b>
Change over previous year (%)	(2.4)	(-16.2)	(-64.3)
<b>India (m €)</b> :	136	178	<b>172</b>
Change over previous year (%)	(68.6)	(30.7)	(-3.6)
<b>ASEAN (m €)</b> :	255	212	<b>197</b>
Change over previous year (%)	(31.1)	(-17.1)	(-6.9)
<b>China (m €)</b> :	650	627	<b>717</b>
Change over previous year (%)	(-19.5)	(-3.5)	(14.3)

# Export to Major Destinations 2017 (2016)

Percentage shares



# TOP-10-Destinations 2016 (2015)



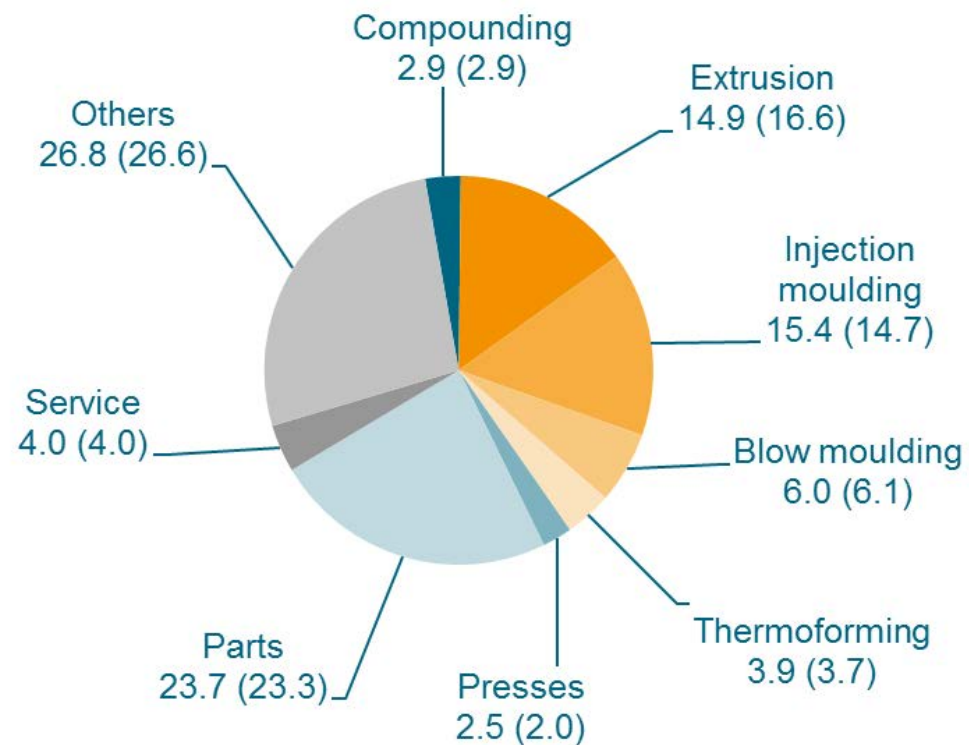
	2016 (m €)	2016 / 2015 (%)	Shares of Export (%)	Position	
				2016	2015
<b>Export Total</b>	<b>5.299</b>	<b>6.8</b>	<b>100.0</b>		
USA	847.3	10.1	16.0	1	1
China	717.0	14.3	13.5	2	2
Mexico	268.8	4.5	5.1	3	4
Italy	241.8	2.9	4.6	4	3
Poland	231.9	8.9	4.4	5	6
France	188.8	-4.1	3.6	6	5
India	171.8	-3.6	3.2	7	10
Czech Republic	162.4	-0.5	3.1	8	8
Great Britain	143.9	1.6	2.7	9	7
Spain	136.8	0.1	2.6	10	14



# Production 2017 (2016)

## Shares of Machinery Types

Percentage shares



Core Machinery

Source: VDMA

# Injection Moulding Machines



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Production</b> (m €):	1,039	1,095	<b>1,188</b>
Change over previous year (%)	(14.6)	(5.5)	(8.5)
» <b>Shares in Production Total</b> (%):	14.8	14.7	<b>15.4</b>
» <b>Export</b> (m €):	845	896	<b>1,006</b>
Change over previous year (%)	(7.1)	(6.1)	(12.2)
» <b>Export share</b> (%):	81.3	81.8	<b>84.6</b>

# Extruders and Extrusion Lines



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Production (m €):</b>	1,098	1,237	<b>1,154</b>
Change over previous year (%)	(9.3)	(12.7)	(-6.7)
» <b>Share in Production Total (%)</b> :	15.7	16.6	<b>14.9</b>
» <b>Export (m €):</b>	771	609	<b>670</b>
Change over previous year (%)	(25.2)	(-21.0)	(10.0)
» <b>Export share (%)</b> :	70.2	49.3	<b>58.1</b>

# Blow Moulding Machines



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Production (m €):</b>	437	455	<b>462</b>
Change over previous year (%)	(0.1)	(3.7)	(1.7)
» <b>Shares in Production Total (%):</b>	6,2	6.1	<b>6.0</b>
» <b>Export (m €):</b>	355	412	<b>441</b>
Change over previous year (%)	(-9.9)	(15.9)	(7.1)
» <b>Export share (%):</b>	81.2	90.5	<b>95.4</b>

# Vakuum Forming and Other Thermoforming Machines



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Production</b> (m €):	275	276	<b>303</b>
Change over previous year (%)	(19.8)	(0.3)	(9.9)
» <b>Share in Production Total</b> (%):	3.9	3.7	<b>3.9</b>
» <b>Export</b> (m €):	197	203	<b>240</b>
Change over previous year (%)	(21.2)	(3.0)	(18.4)
» <b>Export share</b> (%):	71.8	73.7	<b>79.4</b>

# Presses



	<u>2015</u>	<u>2016</u>	<u>2017</u>
» <b>Production</b> (m €):	172	147	<b>191</b>
Change over previous year (%)	(13.9)	(-14.5)	(29.6)
» <b>Share in Production Total</b> (%):	2.5	2.0	<b>2.5</b>
» <b>Export</b> (m €):	60	71	<b>82</b>
Change over previous year (%)	(-20.1)	(17.8)	(15.0)
» <b>Export share</b> (%):	35.1	48.4	<b>42.9</b>

# Current Situation and Forecast



## New Orders January – April 2018 / 2017:

» Total	+6%
– Domestic Market	+0 %
– Export	+7 %
– EURO-Countries	-11 %

## Forecast

» 2018: +3 %      Production value: 8.0 bn Euro

**Thank you**  
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for your attention