

MBX



Market Barometer Index Evaluation

Survey period:
April to May 2025



- › **Market barometer Europe**
- › **Market barometer D/A/CH**

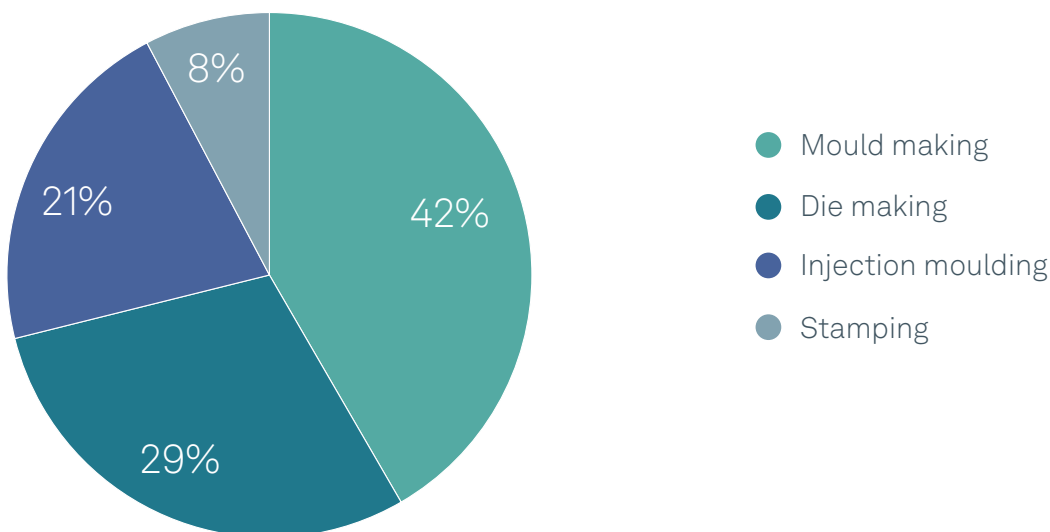


Market barometer Europe

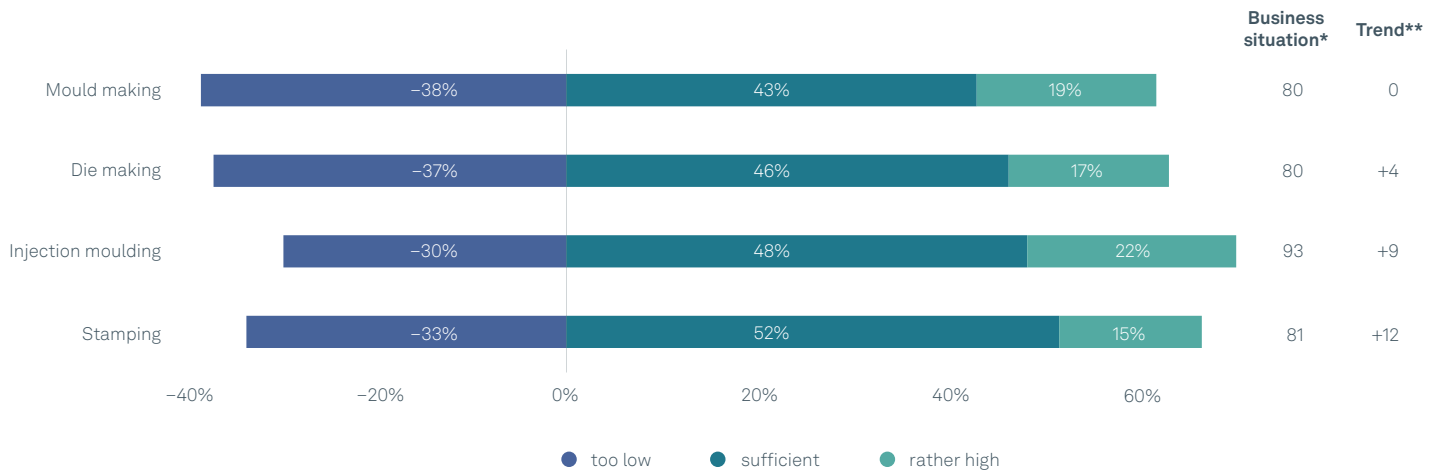
A representative survey of the mould and die making industry in Europe

This survey has been developed and carried out together with the WBA Tooling Academy. The goal was to create an international Market Barometer Index that continuously reflects current trends, developments and challenges in the industry. Several thousand participants from all over Europe took part in the representative customer survey. The evaluation includes the results of the participants from the areas of mould making, die making, injection moulding and stamping. Percentages in the charts have been rounded to ensure better readability.

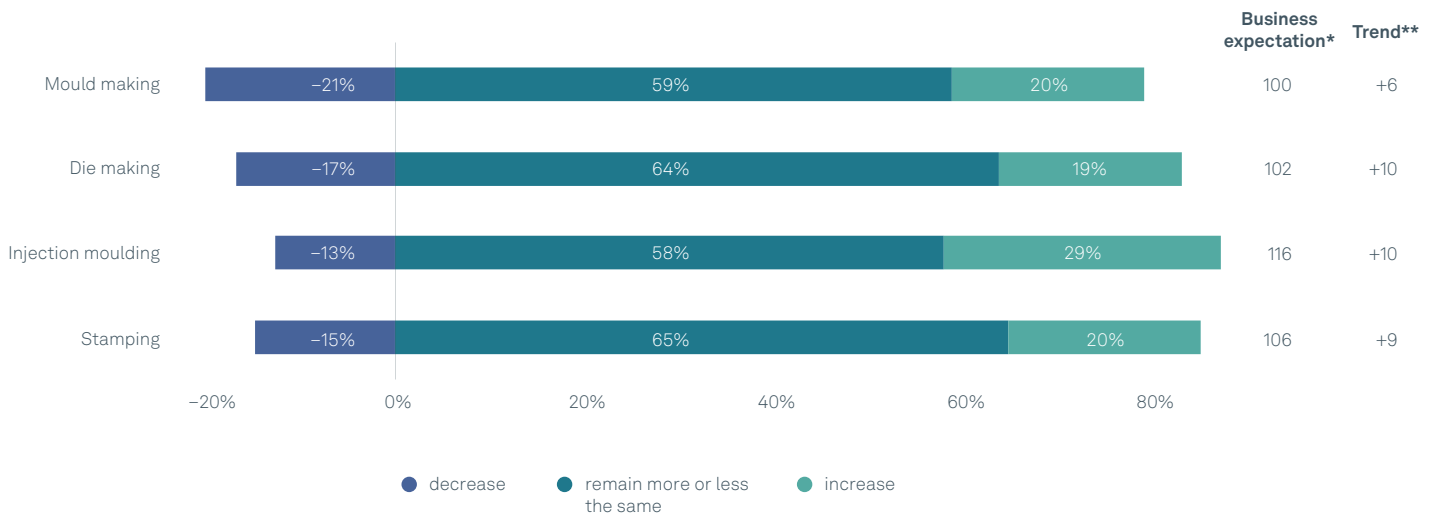
1. Which area do you primarily work in?



2. How is the current utilisation of your company?



3. In the next 12 months, is the total order intake in your company expected to ...



* What is the business situation/expectation?

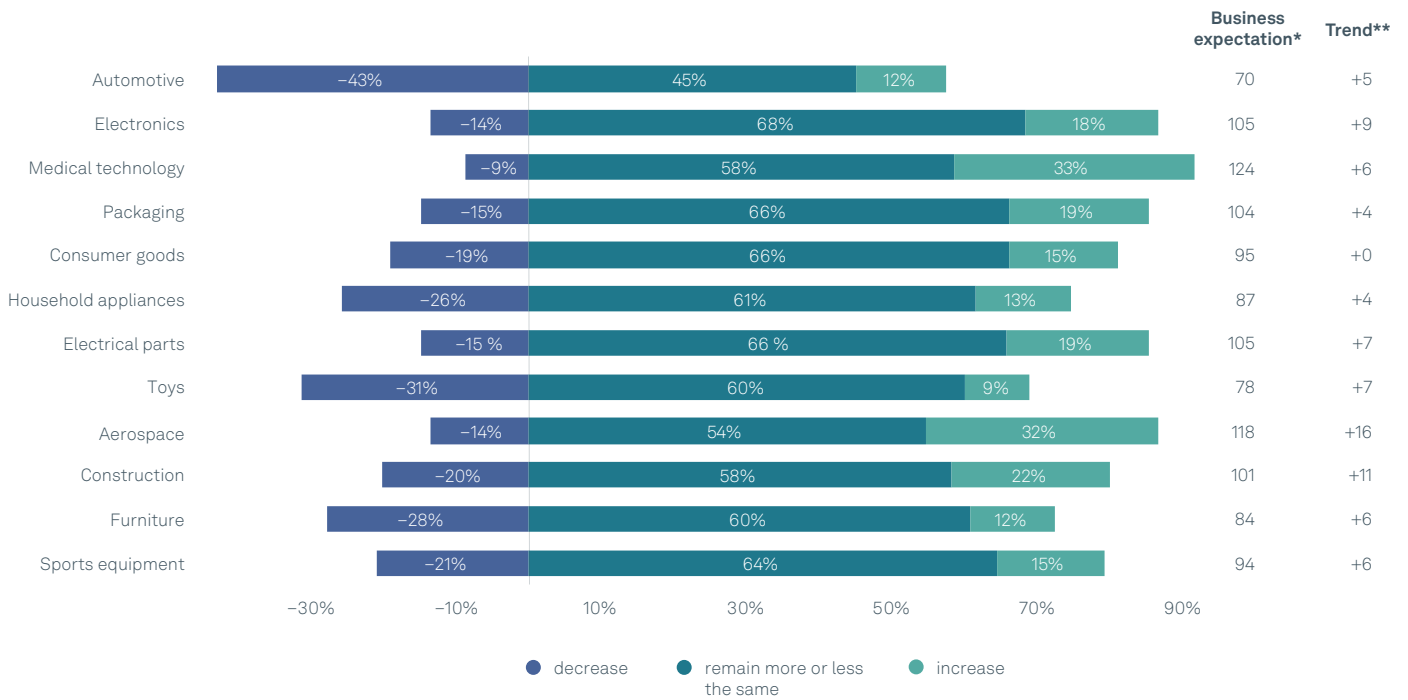
The responses from the survey were weighted and summarised to form an index value. A base value of 100 represents the average. Values above 100 indicate optimism, while values below 100 signal pessimism.



** What is the trend?

The trend describes the change in the business situation/expectation compared to the last survey, which was carried out in autumn 2024.

4. How do you expect incoming orders from the following industries to develop in your company in the next 12 months?



* What is the business expectation?

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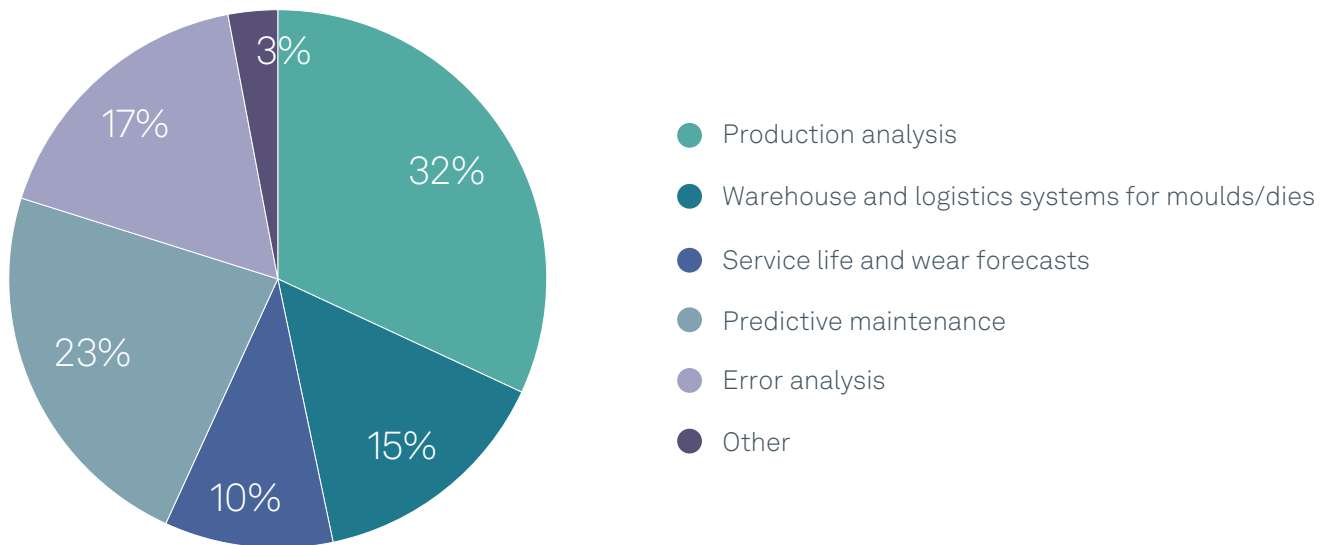
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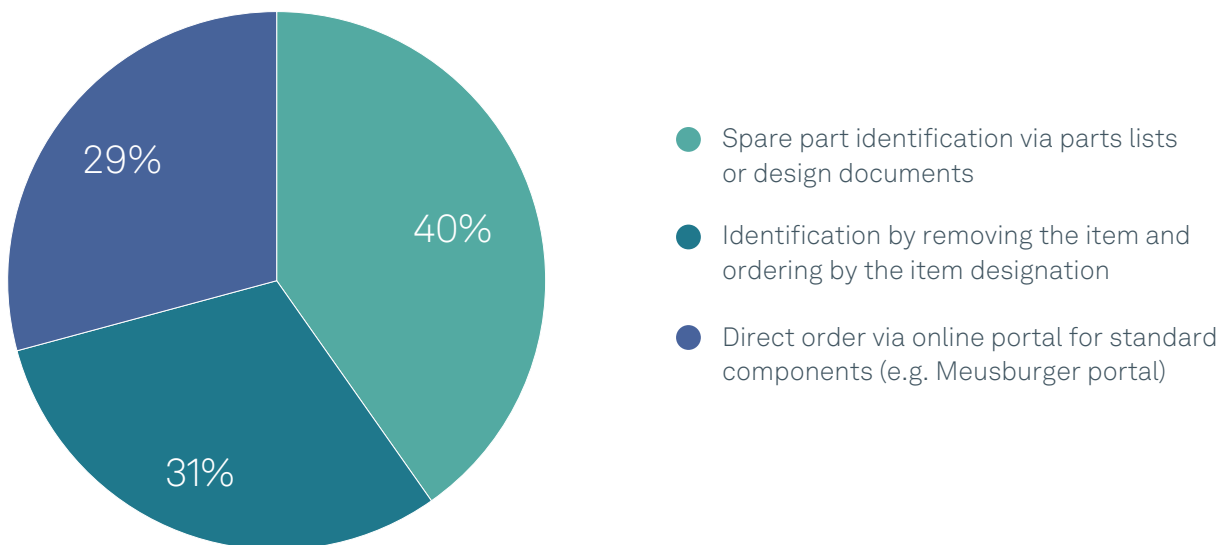
Additional questions

Depending on the answer to question 1, additional questions were either displayed or not displayed: respondents from the areas of injection moulding and stamping answered two additional questions, while participants from the mould and die making areas did not receive any additional questions.

5a. In which application areas of the production process (injection moulding / stamping) does your company use digital solutions?



5b. How do you organise spare parts in case of a mould/die breakage or during mould/die maintenance?

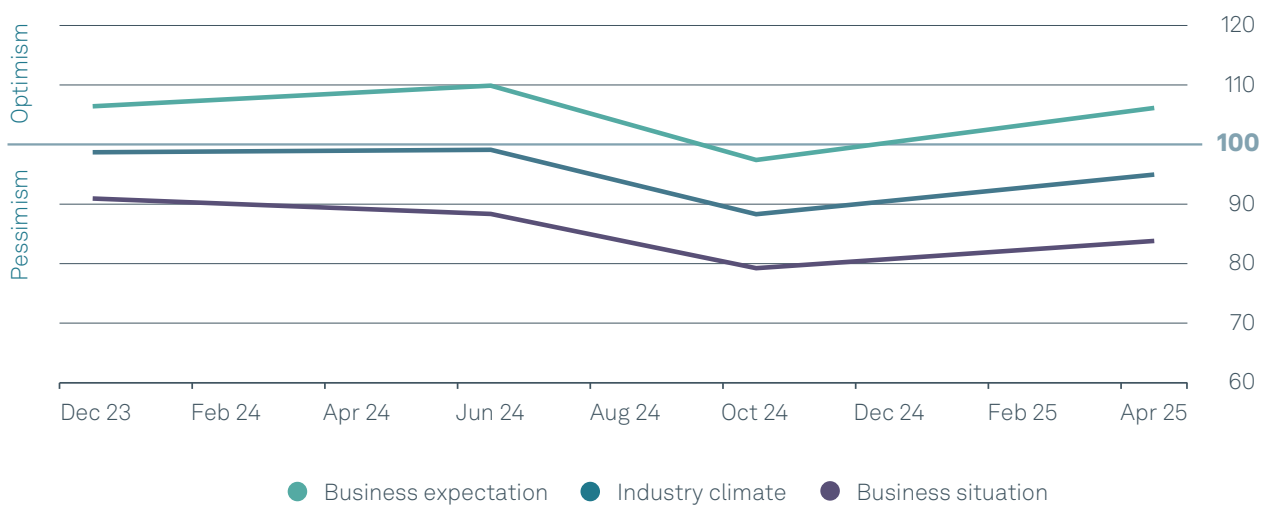


Development of the industry climate in Europe

The industry climate was determined from the responses of companies from mould and die making as well as injection moulding and stamping. Participants were asked to assess their current utilisation and to indicate their expectation for the next six months. They could rate their business situation as 'rather high', 'sufficient' or 'too low' and assess their business expectation with the options 'increase', 'remain more or less the same' or 'decrease'.

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The industry climate is the average of the balances of the business situation and the business expectation.





Conclusion

Conclusion Europe

The current Market Barometer Index provides a differentiated picture: although the current business situation is still viewed pessimistically in all areas, a more optimistic trend is recognisable compared to the last survey.

Current business situation

Despite a slight positive development in April 2025, the market situation remains tense, as evidenced by the clearly pessimistic value of 84 for the current business situation. However, the trend development is somewhat positive: while mould making is still at the same level, die making is showing a slight upward trend after previously being at a lower level. By contrast, injection moulding and stamping are experiencing a much more positive business situation.

Business expectation

With an average of 106, the business expectation is slightly optimistic. A value of 100 for mould making indicates that the business expectation in this area is on the cusp between optimism and pessimism, but the trend value of +6 shows cautious confidence, albeit weaker than in the other three areas. The business expectation for the next 12 months shows significant differences with regards to the individual customer industries: The companies currently see particularly good development prospects with regards to the medical technology and aerospace industries, whereas business expectations regarding the toy industry are pessimistic. Companies are even more critical about future incoming orders from the automotive industry, which is generally regarded most pessimistically.

Additional questions 1 and 2

Digital solutions are currently used primarily for production analysis, but much less frequently for service life and wear forecasts.

In case of a mould/die breakage or during mould/die maintenance, companies identify their spare parts primarily via parts lists or design documents.

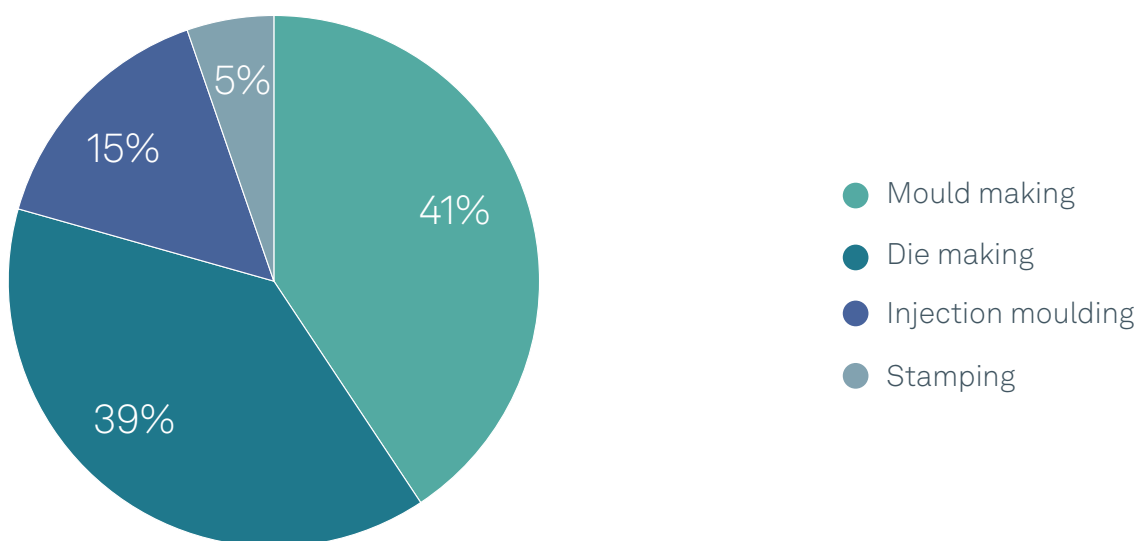


Market barometer D/A/CH

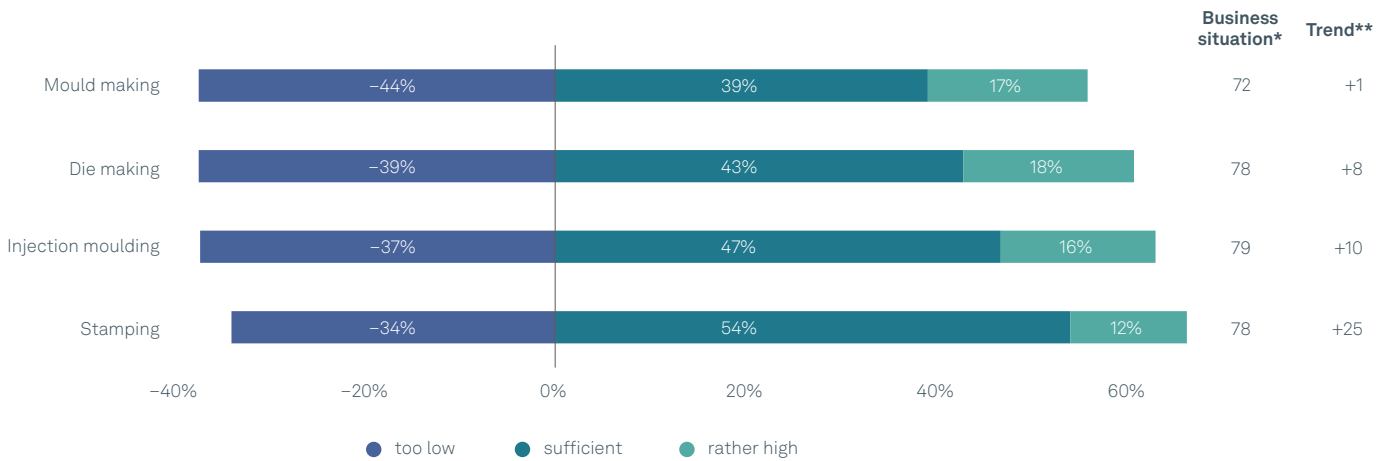
A representative survey of the mould and die making industry in D/A/CH

A significant percentage of the survey participants came from the D/A/CH region (Germany, Austria, Switzerland). The results for these three countries are presented separately below.

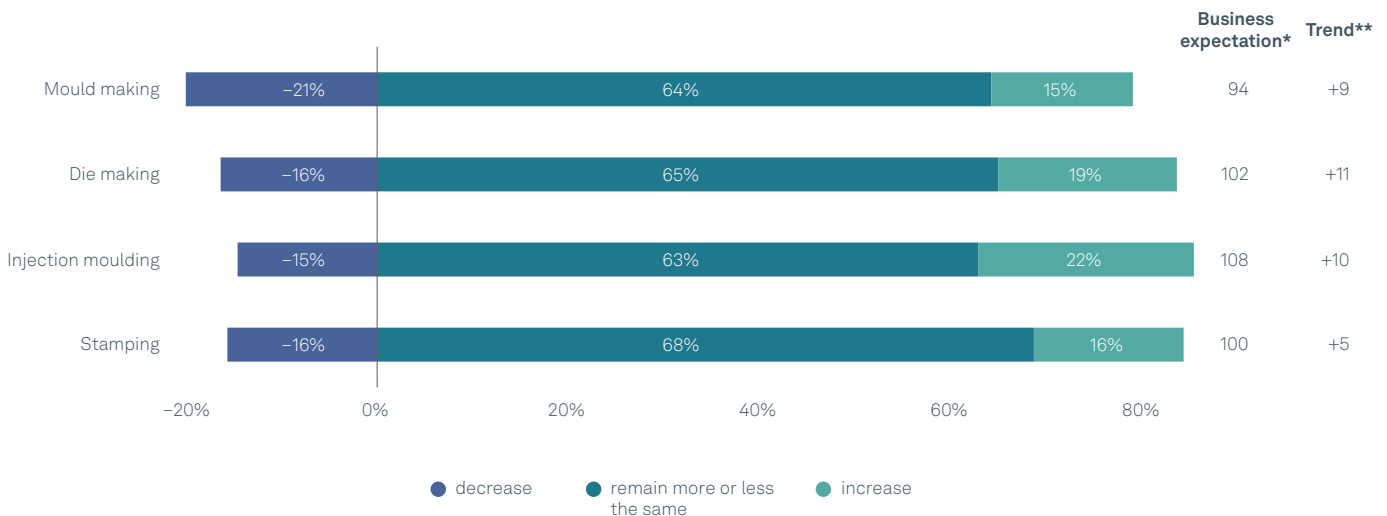
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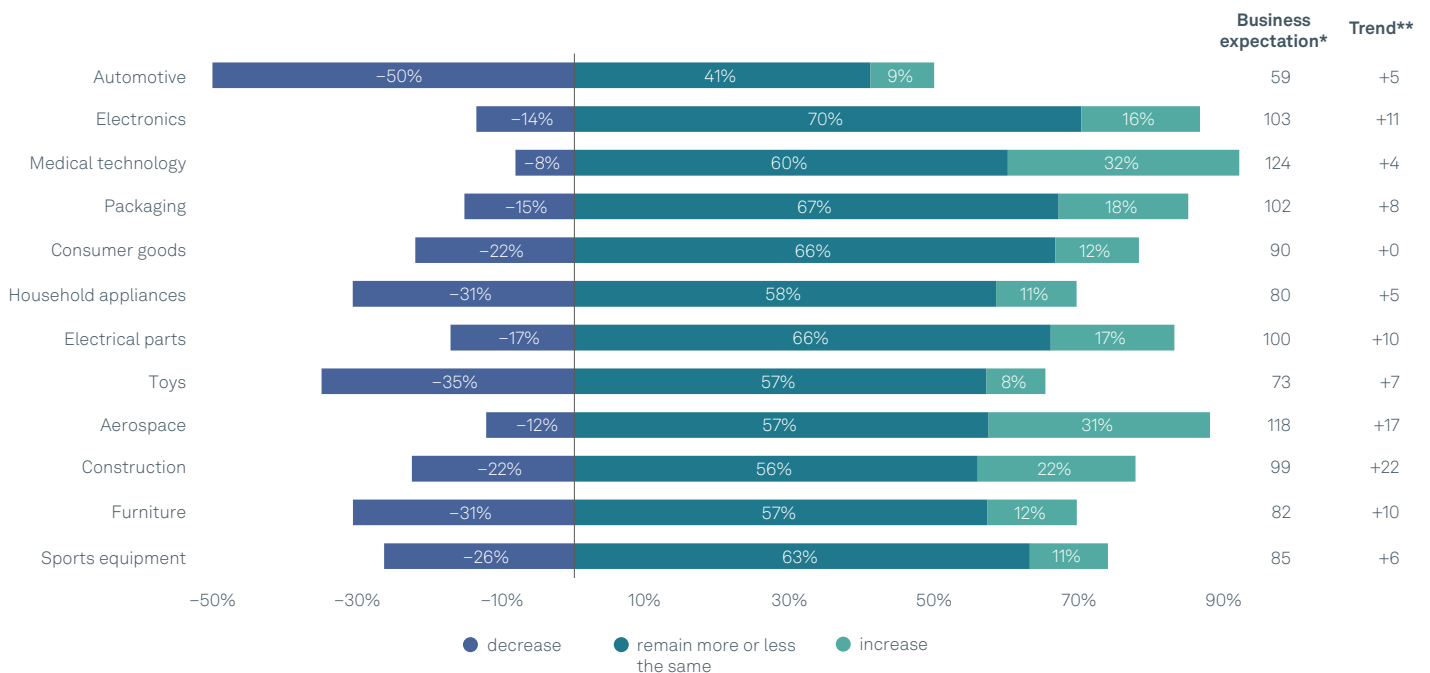
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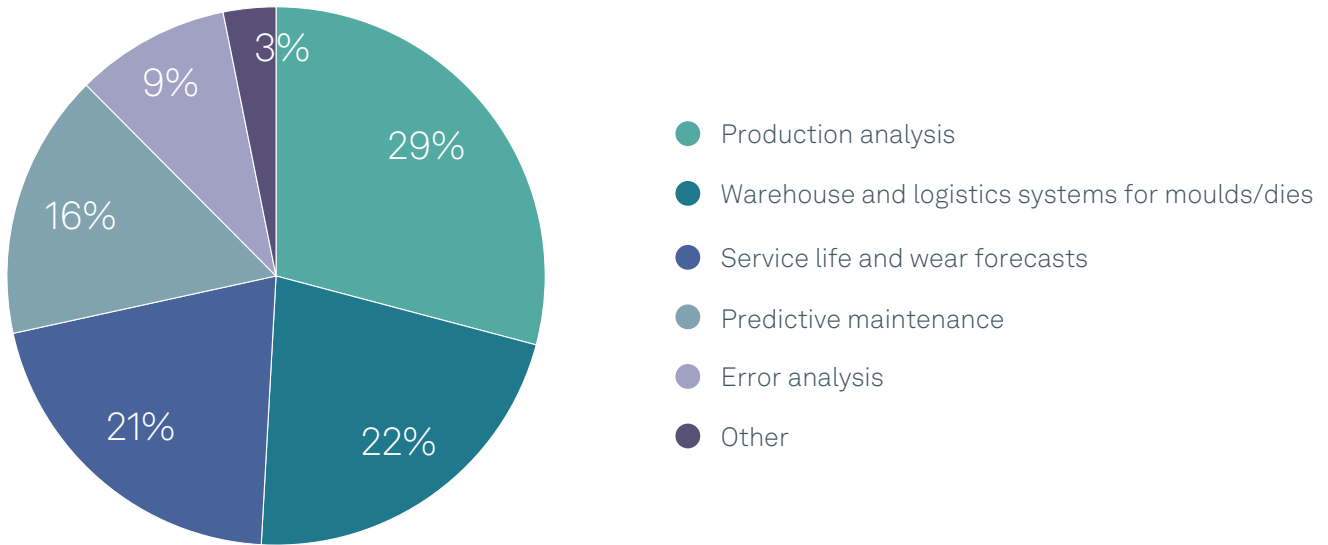
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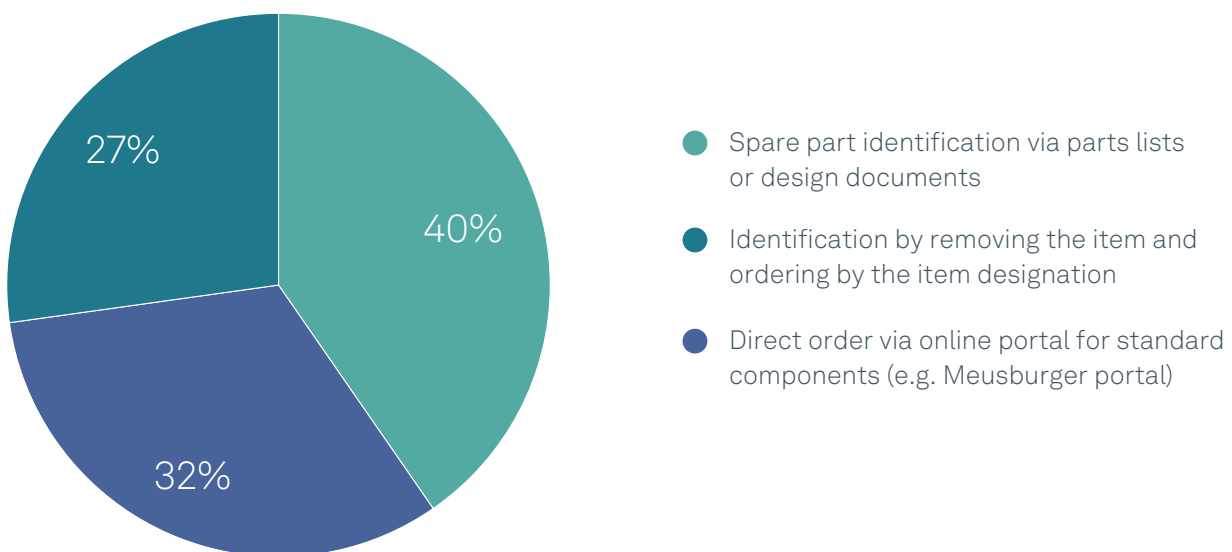
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