

MBX



Market Barometer Index Evaluation

Survey period:
October to November 2025



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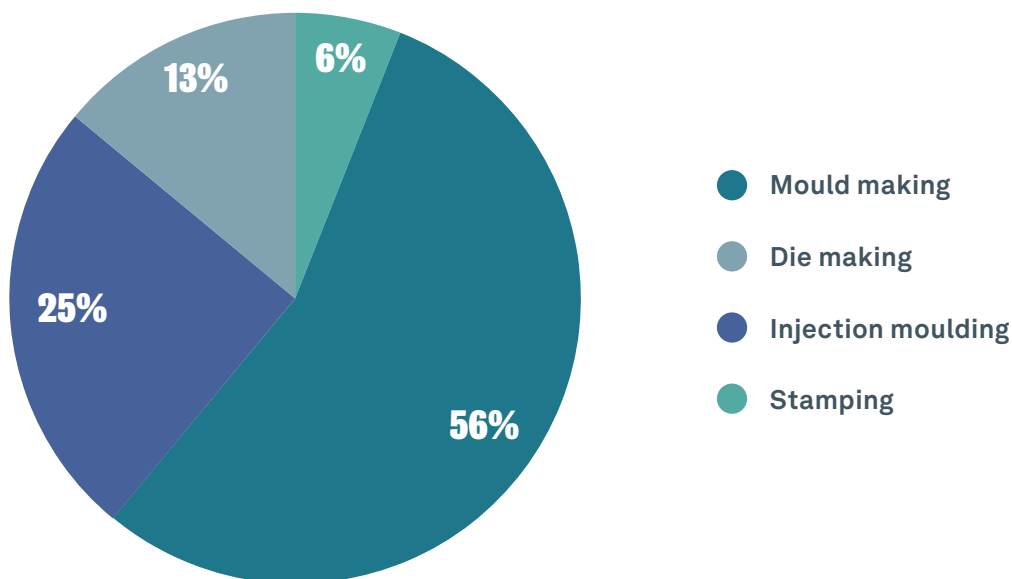


Market Barometer Index Europe

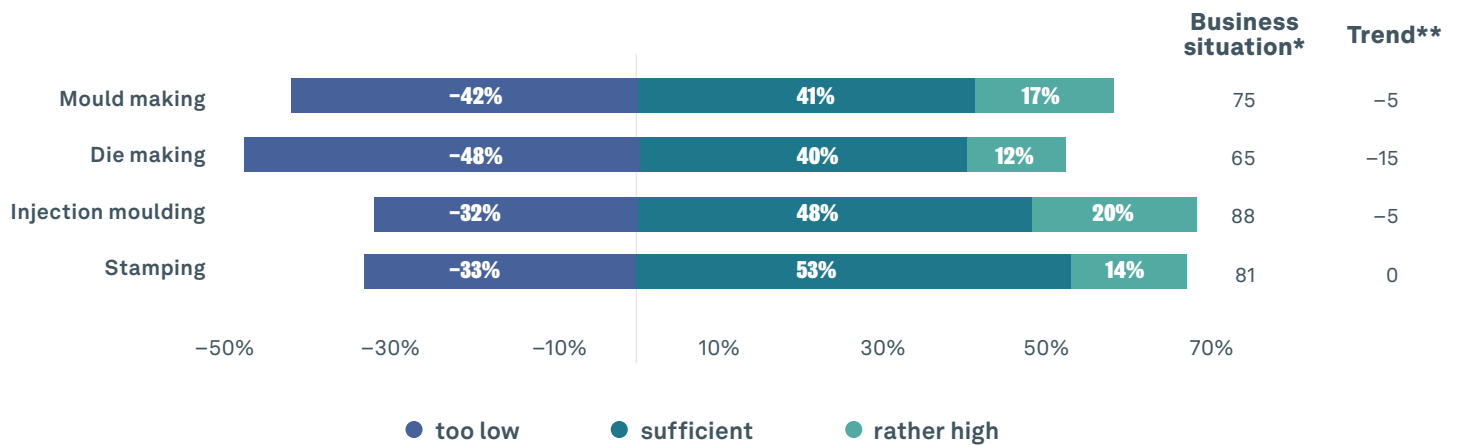
A representative survey of the mould and die making industry in Europe

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.

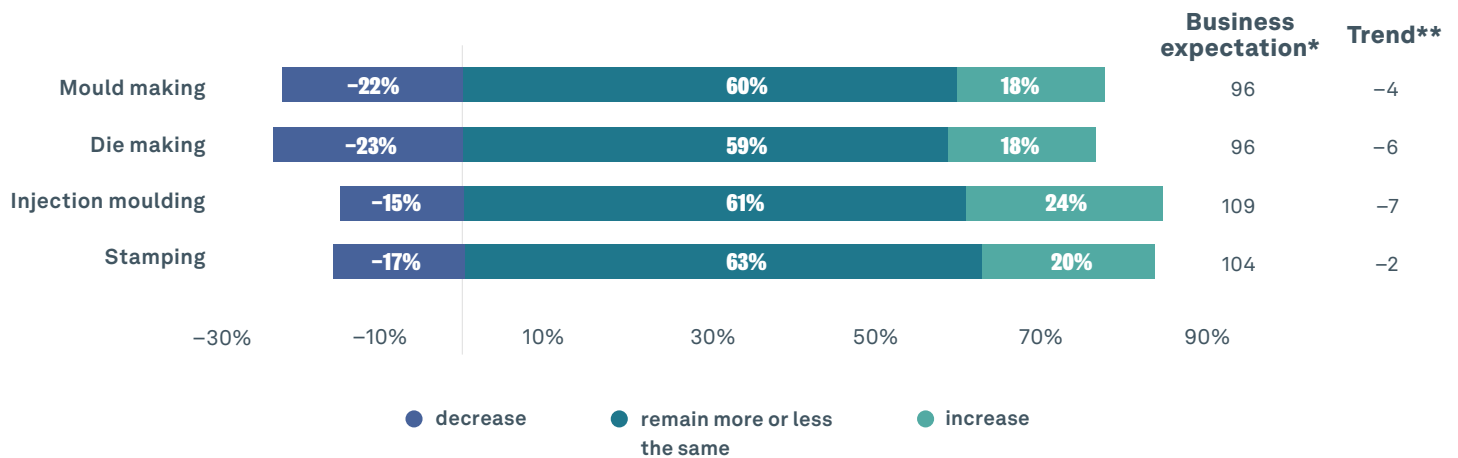
1. Which area do you primarily work in?



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?

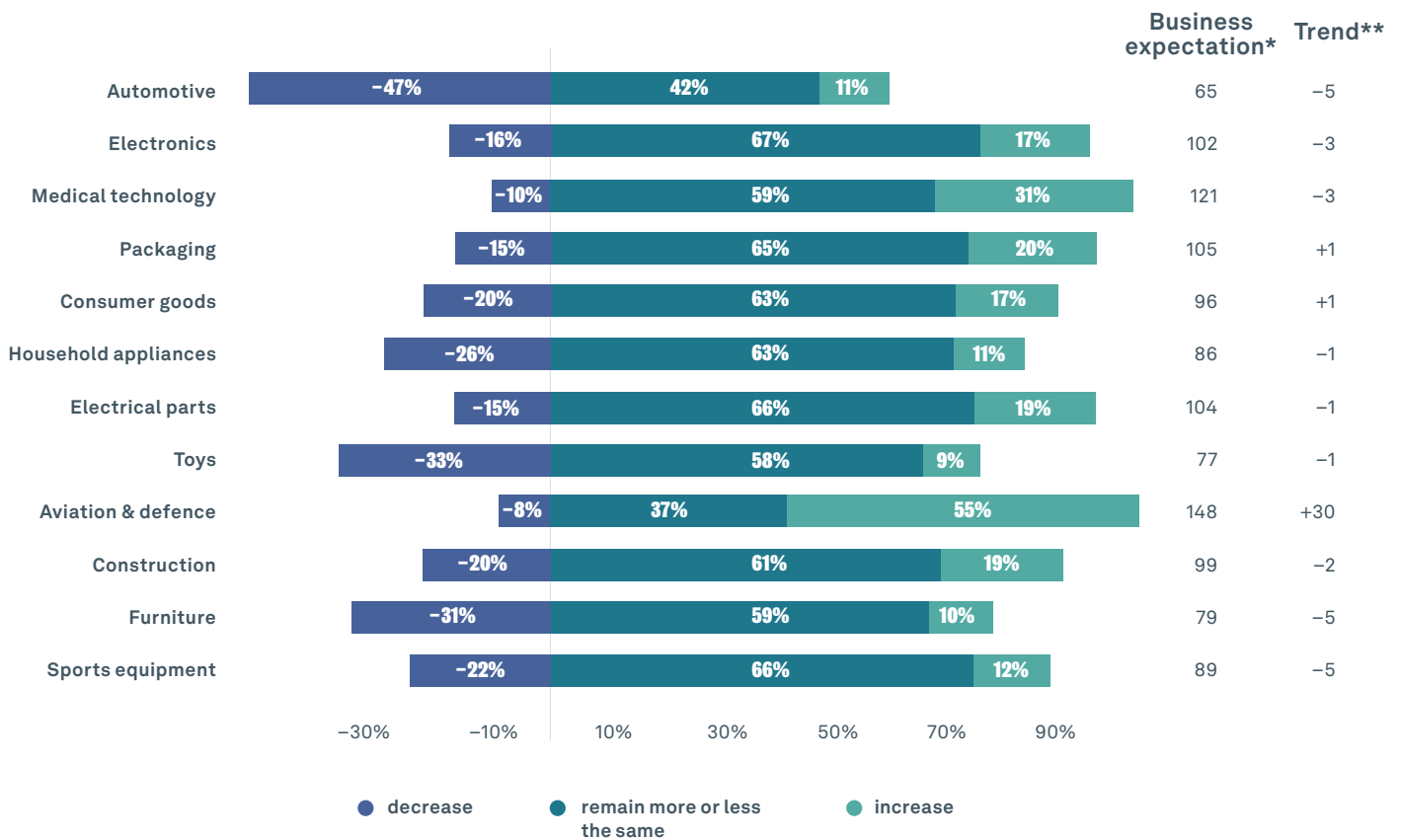
The responses from the survey were weighted and summarised to form an index value. A base value of 100 represents the average. Values above 100 indicate optimism, while values below 100 signal pessimism.



** What is the trend?

The trend describes the change in the business situation/expectation compared to the last survey, which was carried out in spring 2025.

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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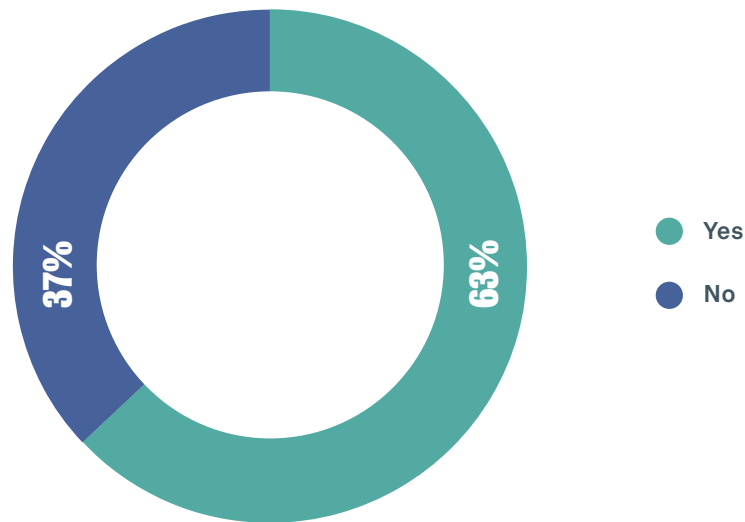
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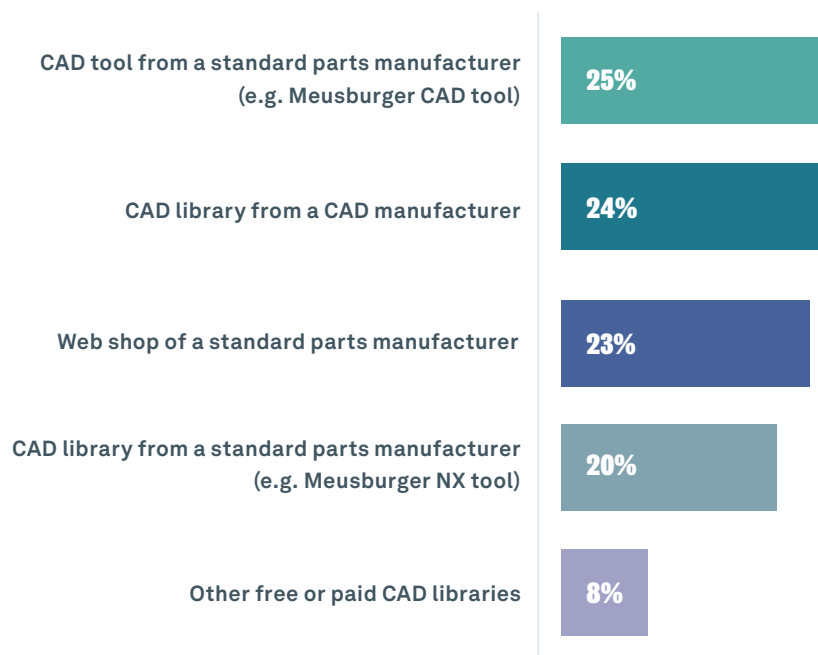
Additional questions

The first additional question (5a) was shown to all participants. Depending on their response, the second additional question (5b) appeared afterwards only for those active in the design sector. Participants not active in this sector did not receive the second additional question.

5a. Are you working in the design sector?



5b. Which option do you primarily use to access CAD data for standard components?

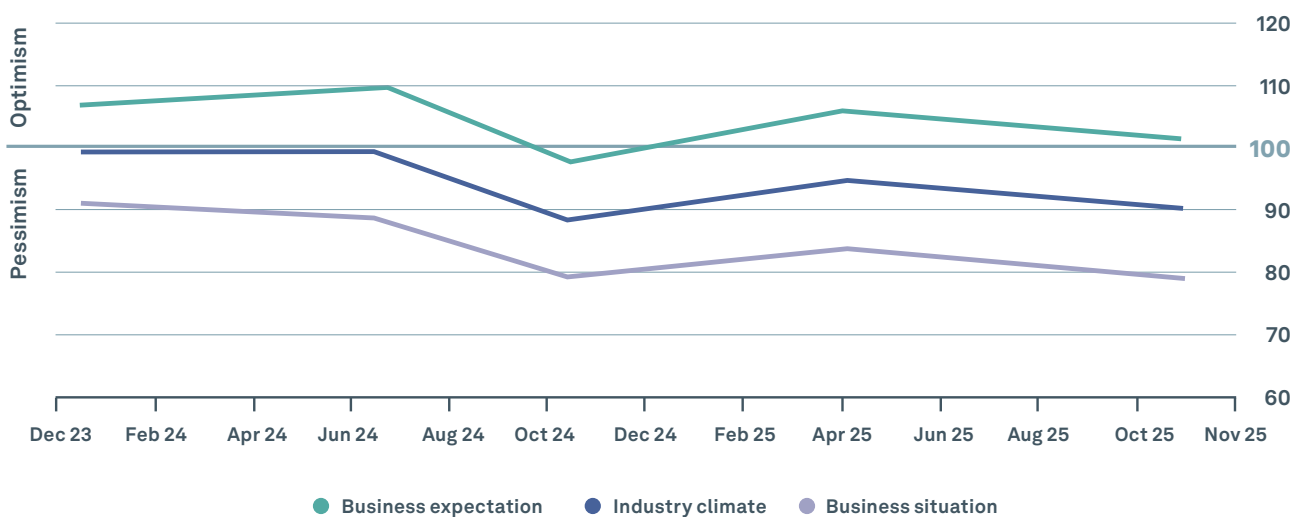


Development of the industry climate in Europe

The industry climate was determined from the responses of companies from all areas (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'.

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.

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 reveals a continued tense market situation. The survey results indicate a minor deterioration of the overall situation in November 2025: the industry climate value has fallen from 95 to 90, while the current business situation value has also fallen from 84 to 79. As such, both values remain clearly below the neutral threshold.

Current business situation

In all areas, the current business situation continues to be assessed pessimistically. Negative sentiment is particularly pronounced in mould and die making. The two production areas, injection moulding and stamping, are also experiencing a tense situation, albeit to a lesser extent.

Business expectation

Compared to April 2025, business expectations have moderately declined to an index value of 101 instead of 106, thereby remaining just above the neutral threshold of 100. In mould and die making, however, the business expectation is at a value of 96, indicating a slightly pessimistic assessment. Business expectations for the next 12 months continue to vary significantly across the different industries. Companies see especially strong positive development prospects in medical technology and in aviation & defence, with the latter showing a notable increase in its value by 30 since the previous survey. In contrast, the future development in the toy and furniture industries is mostly assessed with restraint. The most pessimistic outlook comes for the automotive industry, showing once again a negative trend and a business expectation index of only 65.

Design

More than half of the respondents work in the design sector. When procuring CAD data for standard parts, designers rely on a wide range of solutions, with no obvious favourite. However, what stands out is the high demand for tools and libraries directly from the standard parts manufacturers.

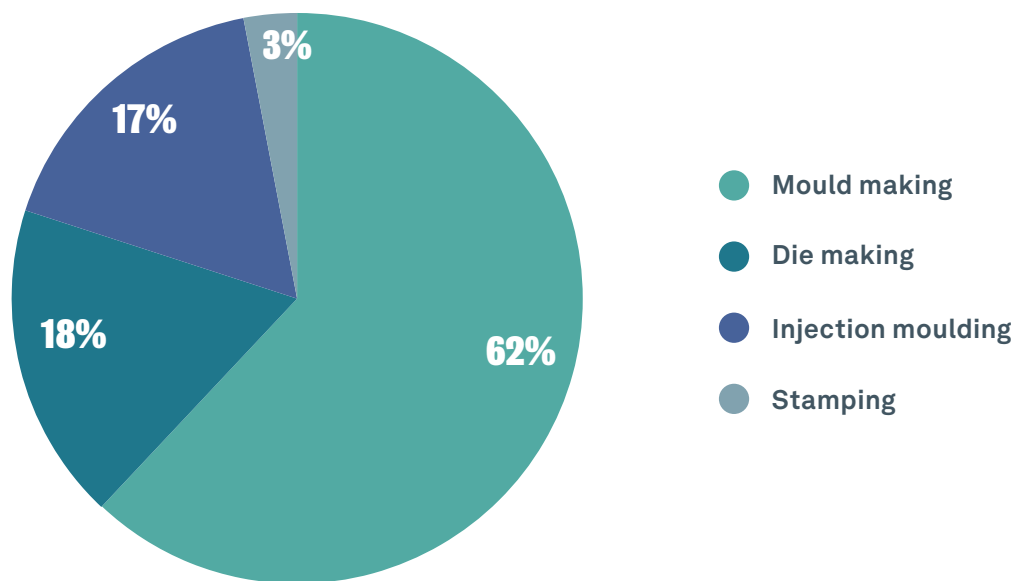


Market Barometer Index D/A/CH

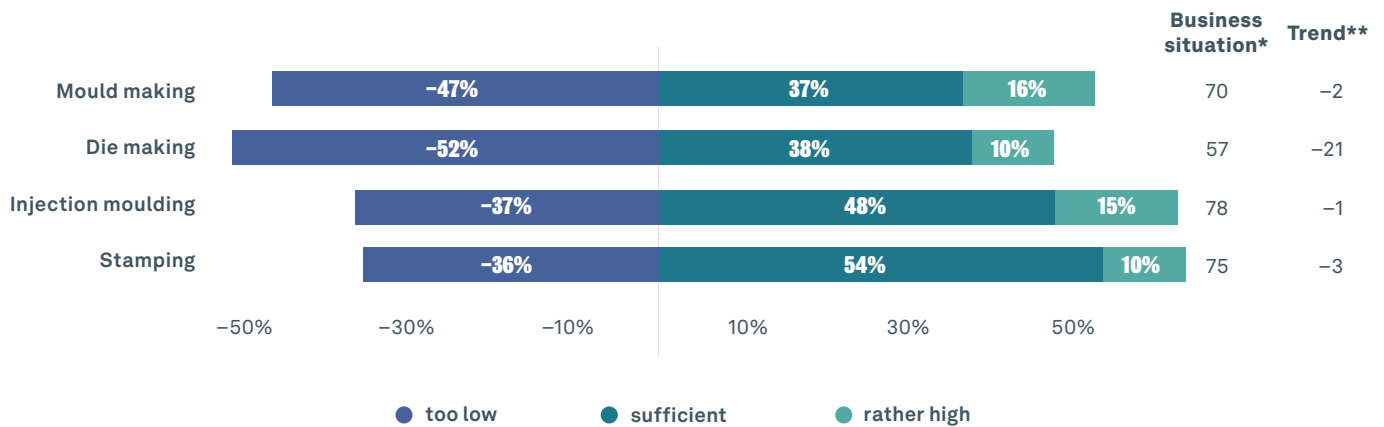
A representative survey of the mould and die making industry in D/A/CH

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.

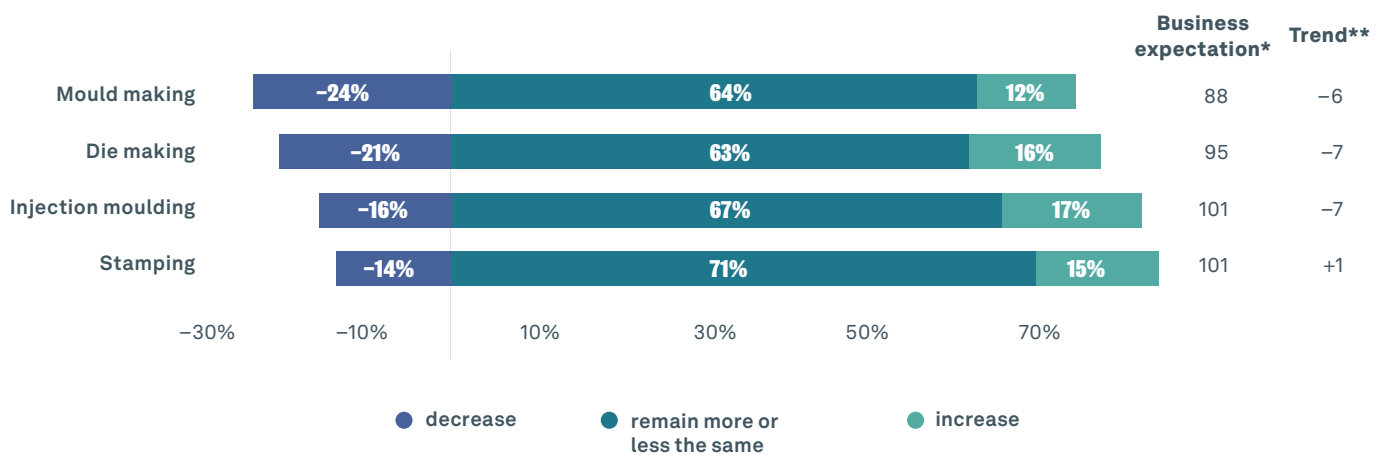
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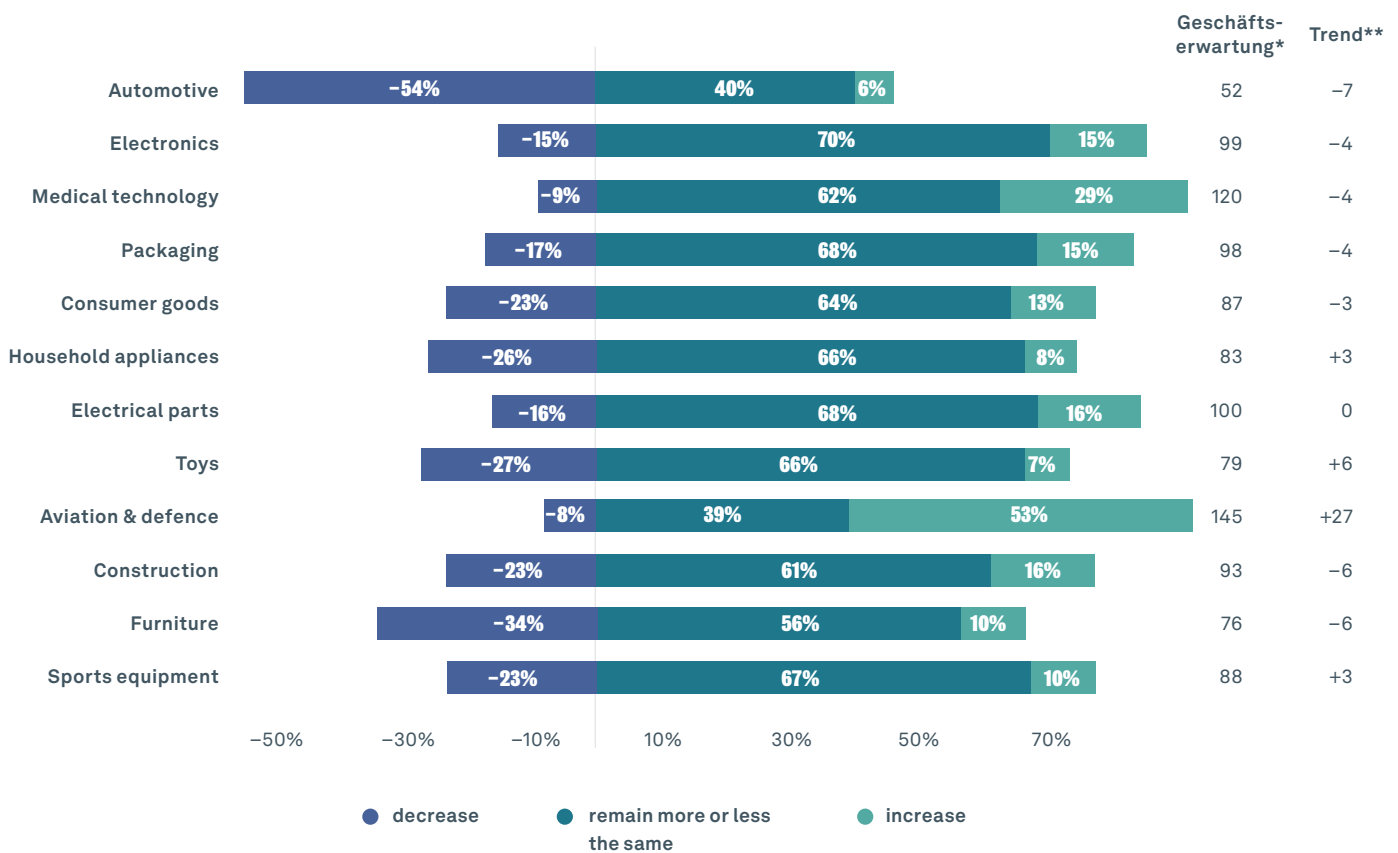
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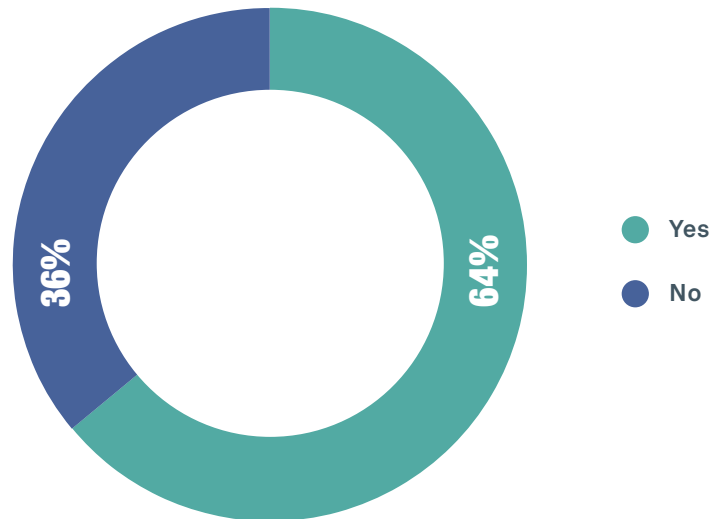
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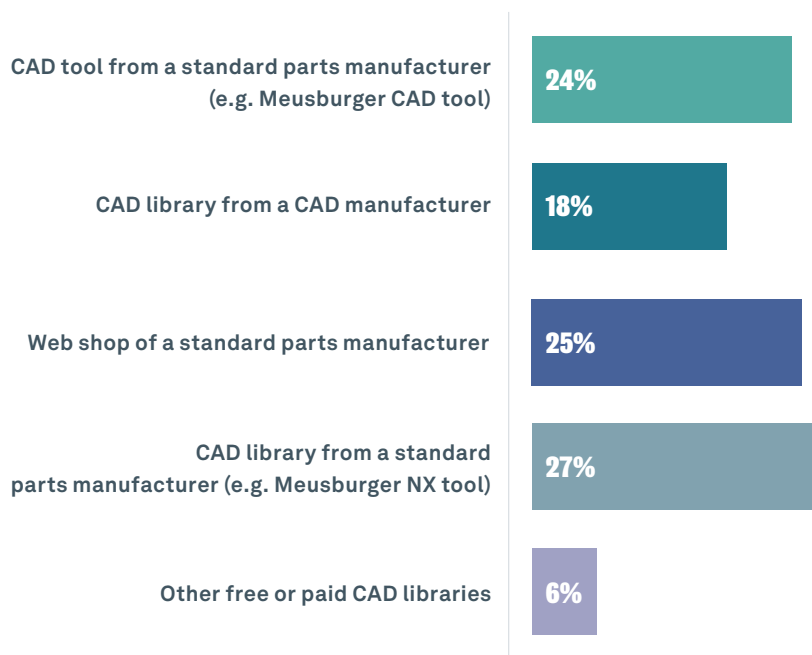
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