

# Market barometer evaluation

(Survey period: May to June 2024)



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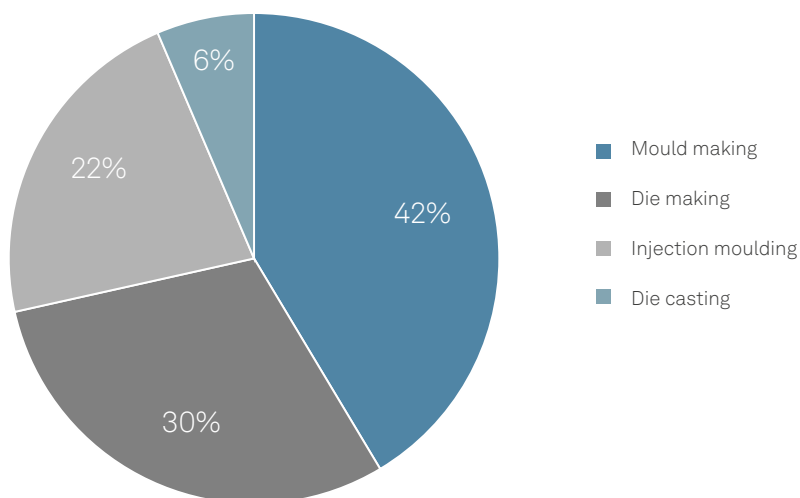


## Market barometer Europe

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

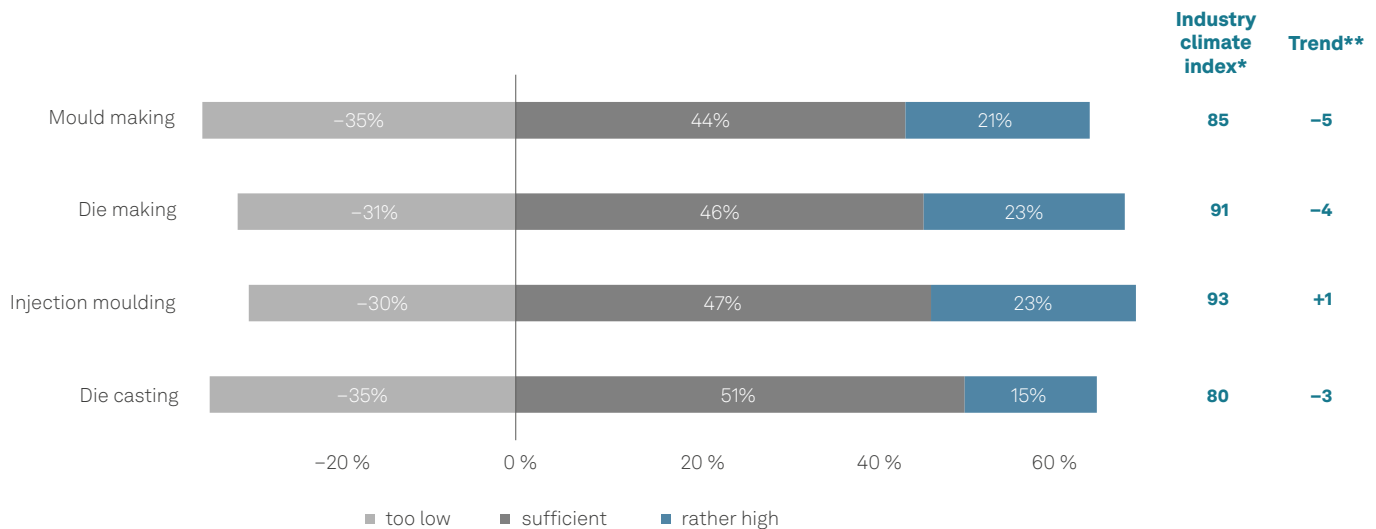
This survey has been developed and carried out together with the WBA Tooling Academy. The goal was to create an international market barometer of current trends, developments and challenges in our industry. In total, more than 4000 people from all over Europe took part in the survey. The evaluation includes the results of the participants from the mould making, die making, injection moulding and die casting sectors. 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?

In all four sectors, around a fifth of respondents respectively judge utilisation in their companies to be rather high. However, approximately 30% consider it to be too low. This is also reflected in the industry climate index, which ranges between 80 (die casting) and 93 (injection moulding), indicating a slight pessimism regarding current utilisation. Compared to the last survey, the industry climate index has deteriorated slightly in most sectors. A positive exception is injection moulding, which records a positive trend of +1.



### \* What is the industry climate index?

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.

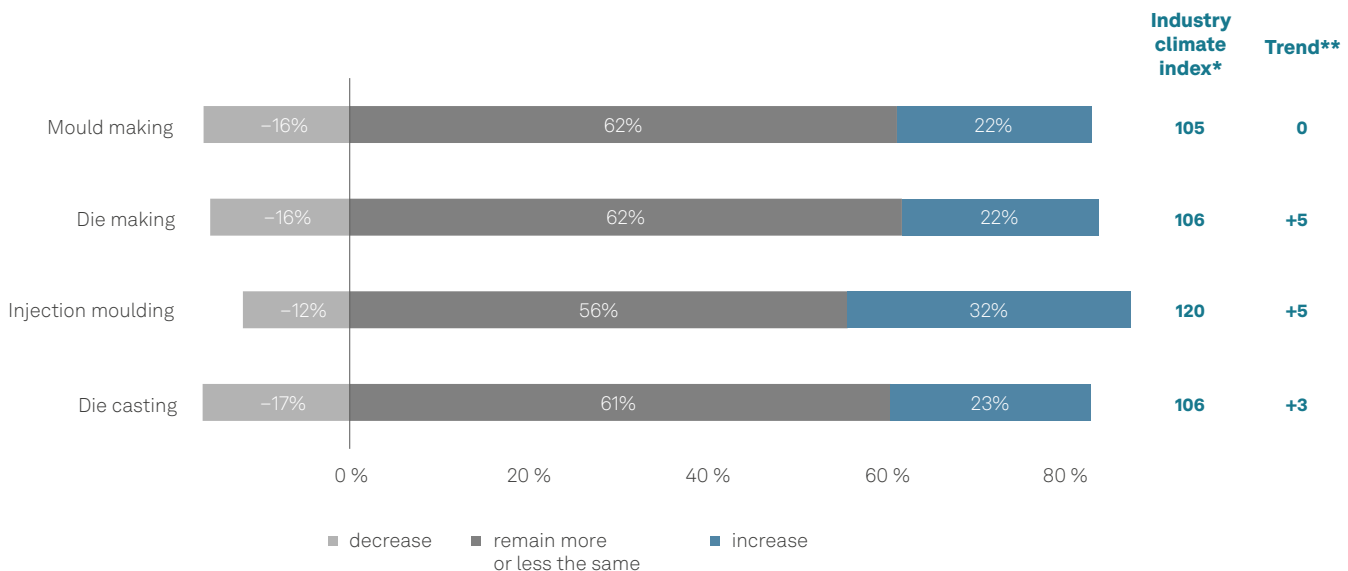


### \*\* What is the trend?

The trend describes the change in the industry climate index compared to the last survey, which was carried out in autumn 2023.

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

In the injection moulding sector, around a third of respondents expect an increase in orders in the next 12 months, compared to only around a fifth in the other sectors. However, one sixth of those surveyed expect a decline. The majority, around 60% per sector, expect a stable order situation in their companies. The industry climate index ranges between 105 (mould making) and 120 (injection moulding), which indicates general optimism. Compared to the last survey, a positive trend can be seen in all sectors.



#### \* What is the industry climate index?

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.

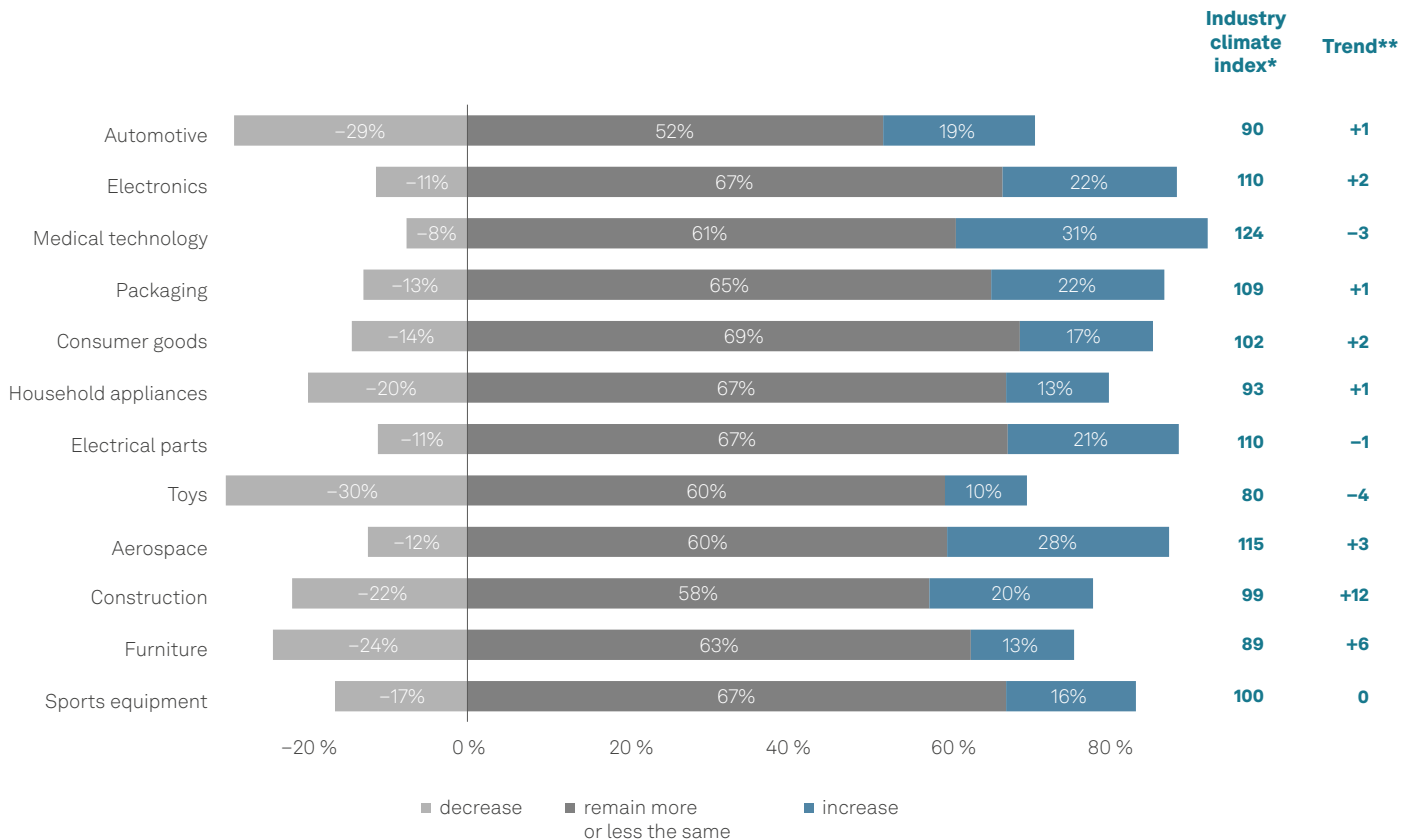


#### \*\* What is the trend?

The trend describes the change in the industry climate index compared to the last survey, which was carried out in autumn 2023.

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

The positive expectations regarding the next 12 months are clearly reflected in the answers to this question: for 7 out of 12 customer sectors, the industry climate index is above or at average. The medical technology and aerospace sectors are particularly remarkable as around a third of respondents expect more orders from both sectors in the coming year. In contrast, respondents were rather pessimistic about the order situation regarding the furniture, toys, construction, automotive, and household appliances sectors. Overall, however, the trend development shows a positive dynamic for most of the sectors, especially for the construction sector (+12).



### \* What is the industry climate index?

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 industry climate index compared to the last survey, which was carried out in autumn 2023.

## 5. In your opinion, how strong is the competition from Chinese mould and die makers?

Almost four fifths of respondents feel that competition from Chinese mould and die makers is rather strong, while only around a fifth of respondents consider the competition to be rather weak. These results illustrate the strong market presence and competitiveness of Chinese companies in the European mould and die sector.



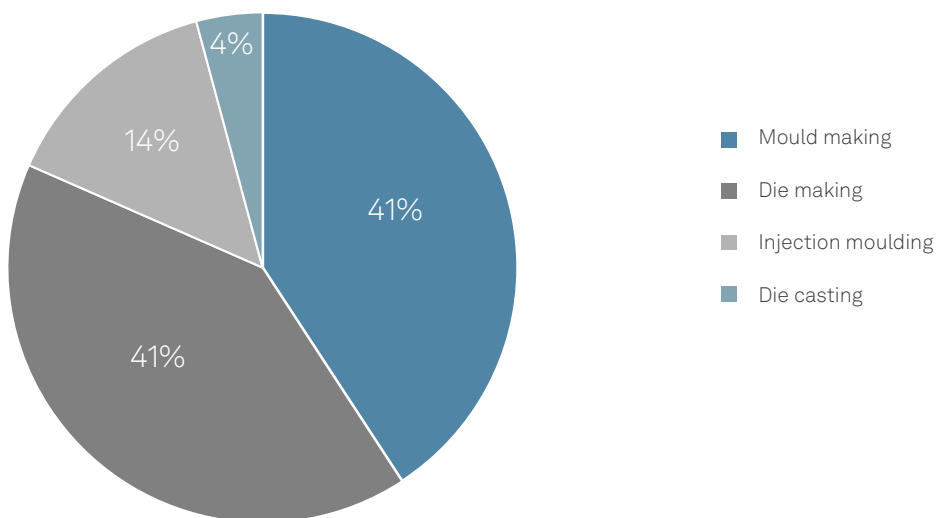


## Market barometer D/A/CH

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

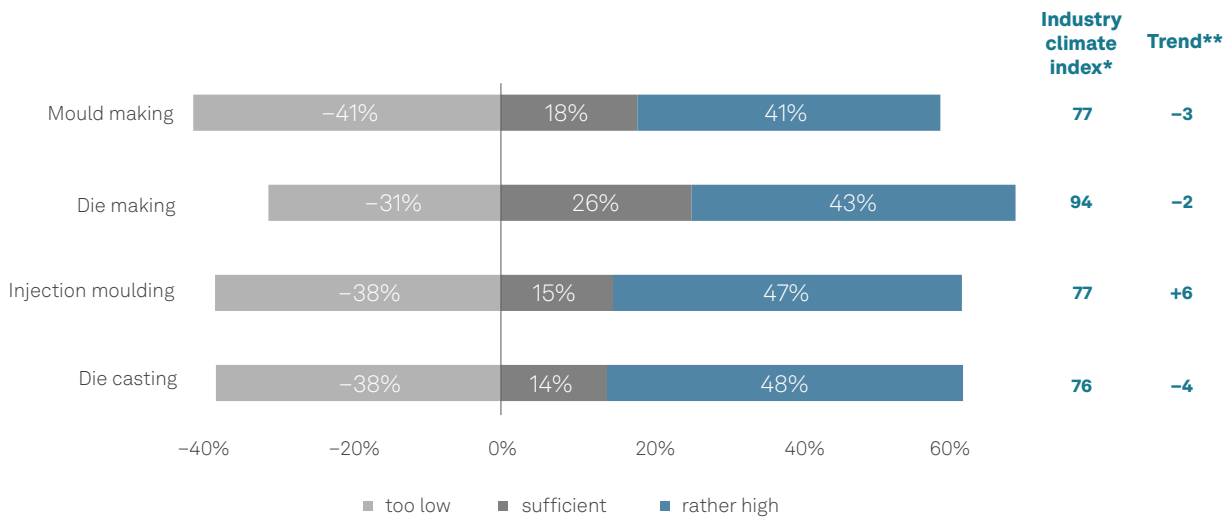
Over 2000 survey participants came from the D/A/CH region (Germany, Austria, Switzerland). The results for these three countries are presented separately below and compared with the overall European values.

### 1. Which area do you primarily work in?



## 2. How is the current utilisation of your company?

In the D/A/CH region, more than two fifths of respondents rate utilisation in their companies as rather high. This result is double the overall European result. However, around 40% of respondents from D/A/CH consider utilisation to be too low, which is slightly above the European value. The industry climate index ranges between 76 (die casting) and 94 (die making) and, similar to Europe as a whole, indicates a slight pessimism regarding current utilisation. In the D/A/CH region as well, the positive exception is injection moulding, which records a positive trend of +6.



### \* What is the industry climate index?

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.

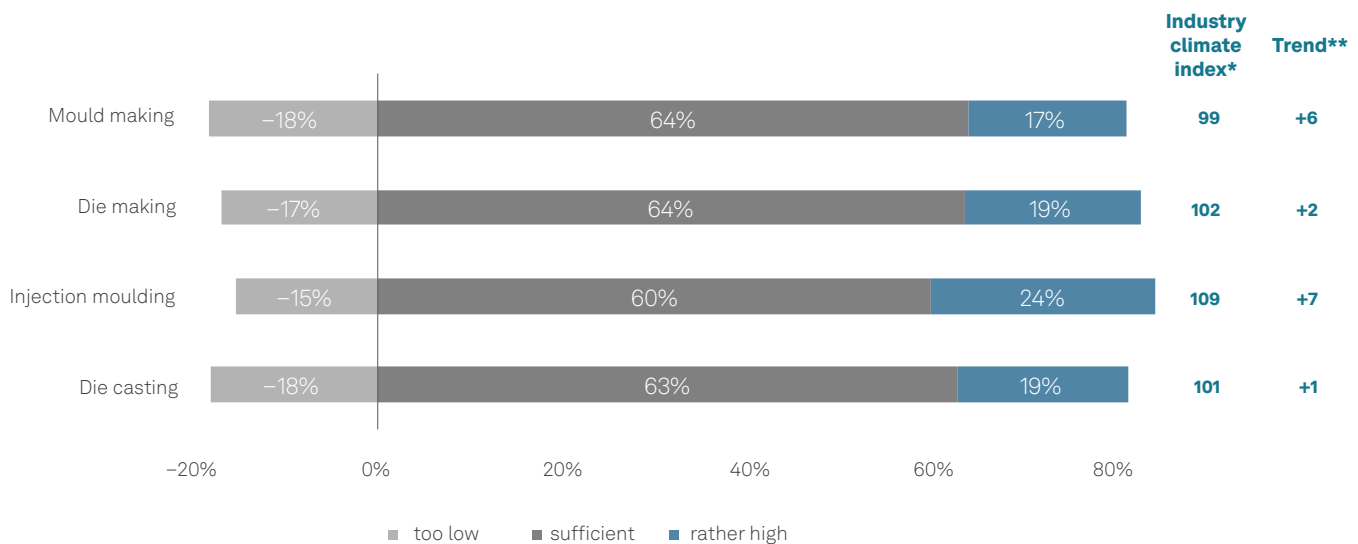


### \*\* What is the trend?

The trend describes the change in the industry climate index compared to the last survey, which was carried out in autumn 2023.

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

Europe and the D/A/CH region have similar expectations regarding incoming orders in the next 12 months. Around one fifth of respondents forecast an increase in orders, while one sixth expect a decline. The majority, around 60% per sector, expect a stable order situation in their companies. The industry climate index ranges between 99 (mould making) and 109 (injection moulding), which indicates slight optimism. Compared to the last survey, a positive trend can be seen in all sectors.



#### \* What is the industry climate index?

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.

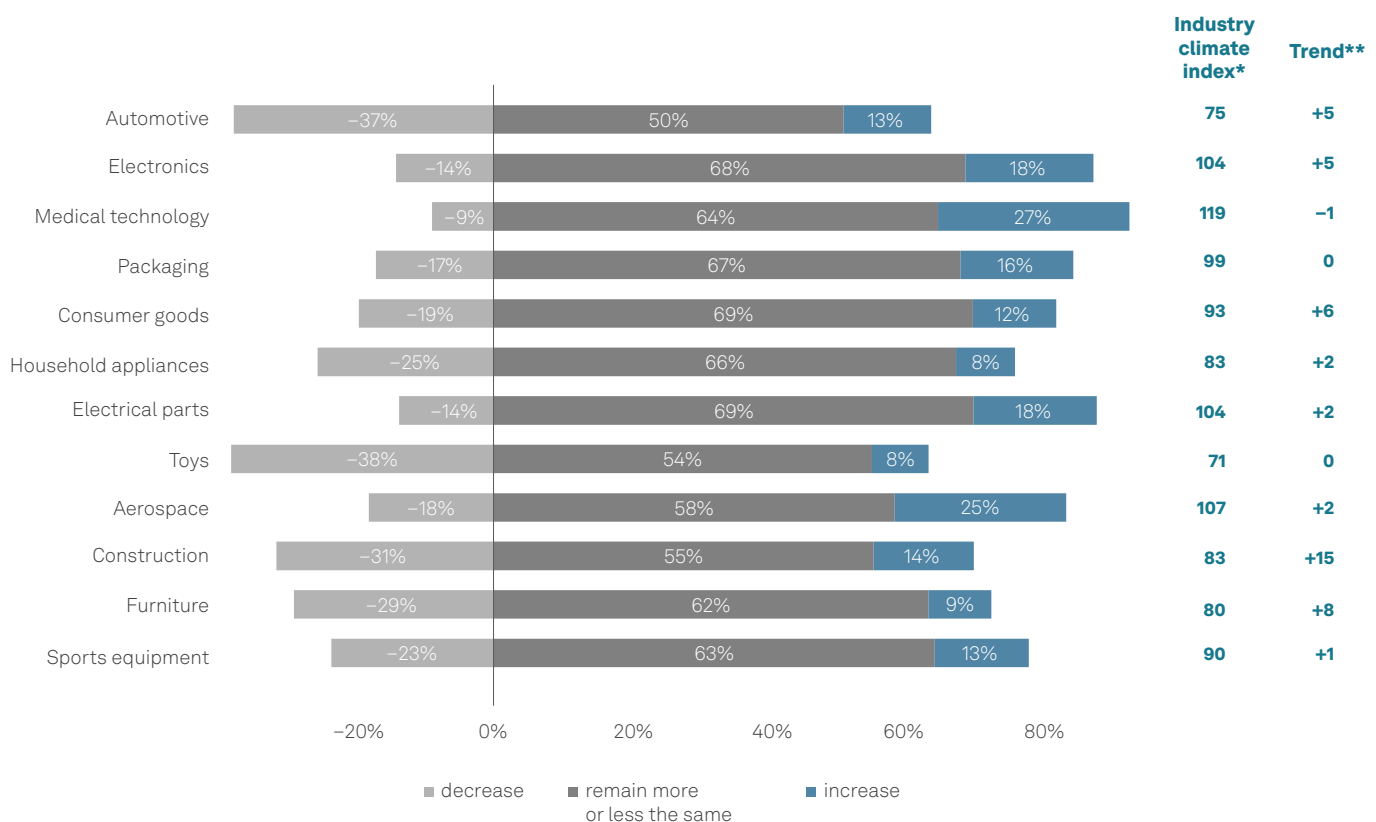


#### \*\* What is the trend?

The trend describes the change in the industry climate index compared to the last survey, which was carried out in autumn 2023.

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

For 4 out of 12 customer sectors, the industry climate index in the D/A/CH region is above or average. Compared to pan-European results, expectations are slightly more pessimistic here. However, as in Europe as a whole, the medical technology and aerospace sectors are judged quite positively, whereas the order situation regarding the furniture, toys, construction, automotive, and household appliances sectors are assessed rather pessimistically. Overall, however, there is a positive trend for most of the sectors, with particularly encouraging dynamics in the construction (+15) and furniture (+8) sectors.



### \* What is the industry climate index?

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 industry climate index compared to the last survey, which was carried out in autumn 2023.

## 5. In your opinion, how strong is the competition from Chinese mould and die makers?

In the D/A/CH region, around a third of respondents perceive the competition from Chinese mould and die makers as rather weak, while two thirds perceive it as rather strong. This means that the perception of competition from Chinese mould and die makers in the D/A/CH region is around 10% weaker than in Europe as a whole.

