

Market barometer evaluation

(Survey period: October to November 2023)



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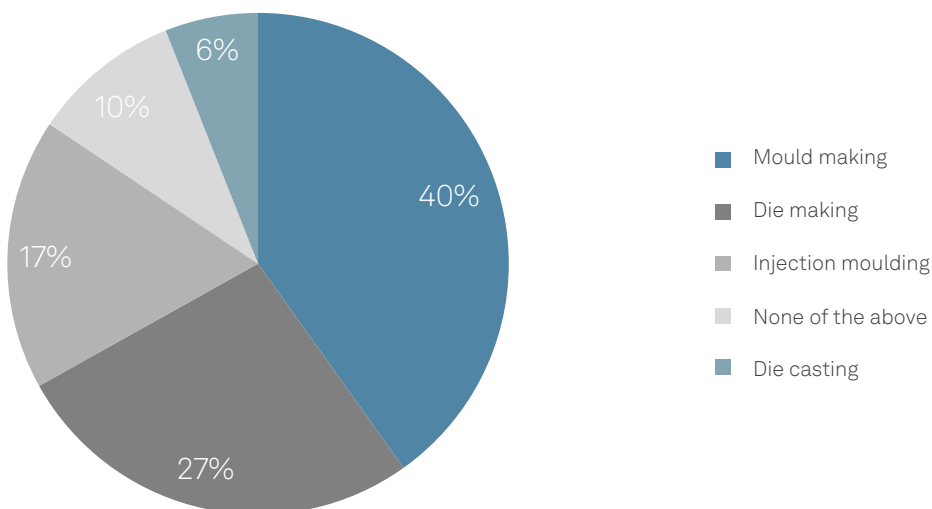


Market barometer Europe

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

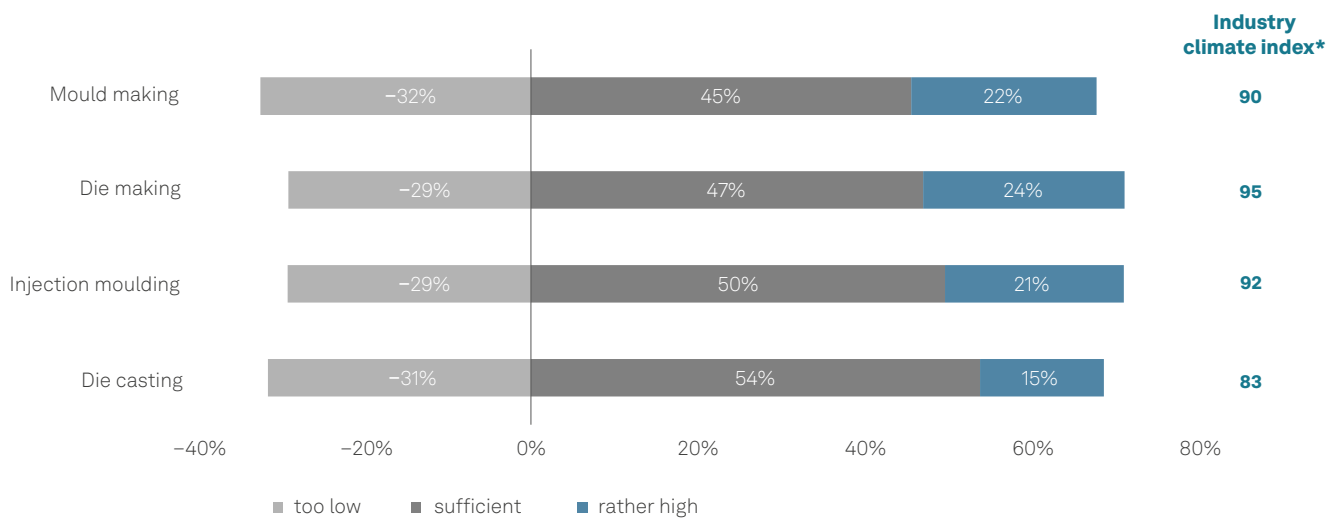
This survey has been developed and carried out together with the WBA Tooling Academy. The goal was to create an international market barometer of current trends, developments and challenges in our industry. In total 3,800 people took part in the survey. Questions 2–5 were not available to those participants who do not work in mould making, die making, injection moulding or die casting. Percentages in the charts have been rounded to ensure better readability. With this market barometer, we aim to provide the industry with important information and insights.

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, whose values range between 83 (die casting) and 95 (die making) and thus indicate a slight pessimism regarding current utilisation.

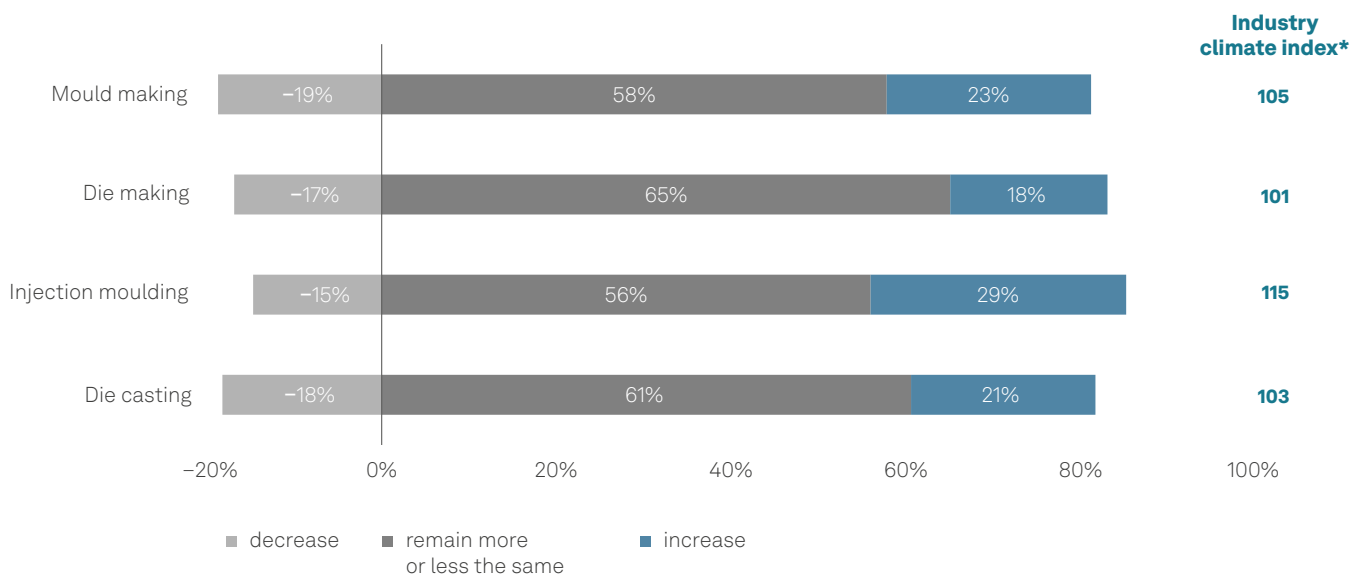


* What is the industry climate index?

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.

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

In the injection moulding sector, around 30% of respondents expect an increase in orders, while the figure for the other sectors is slightly lower at around one fifth each. Nevertheless, the industry climate index in all sectors also suggests that respondents are quite positive about the next 12 months.

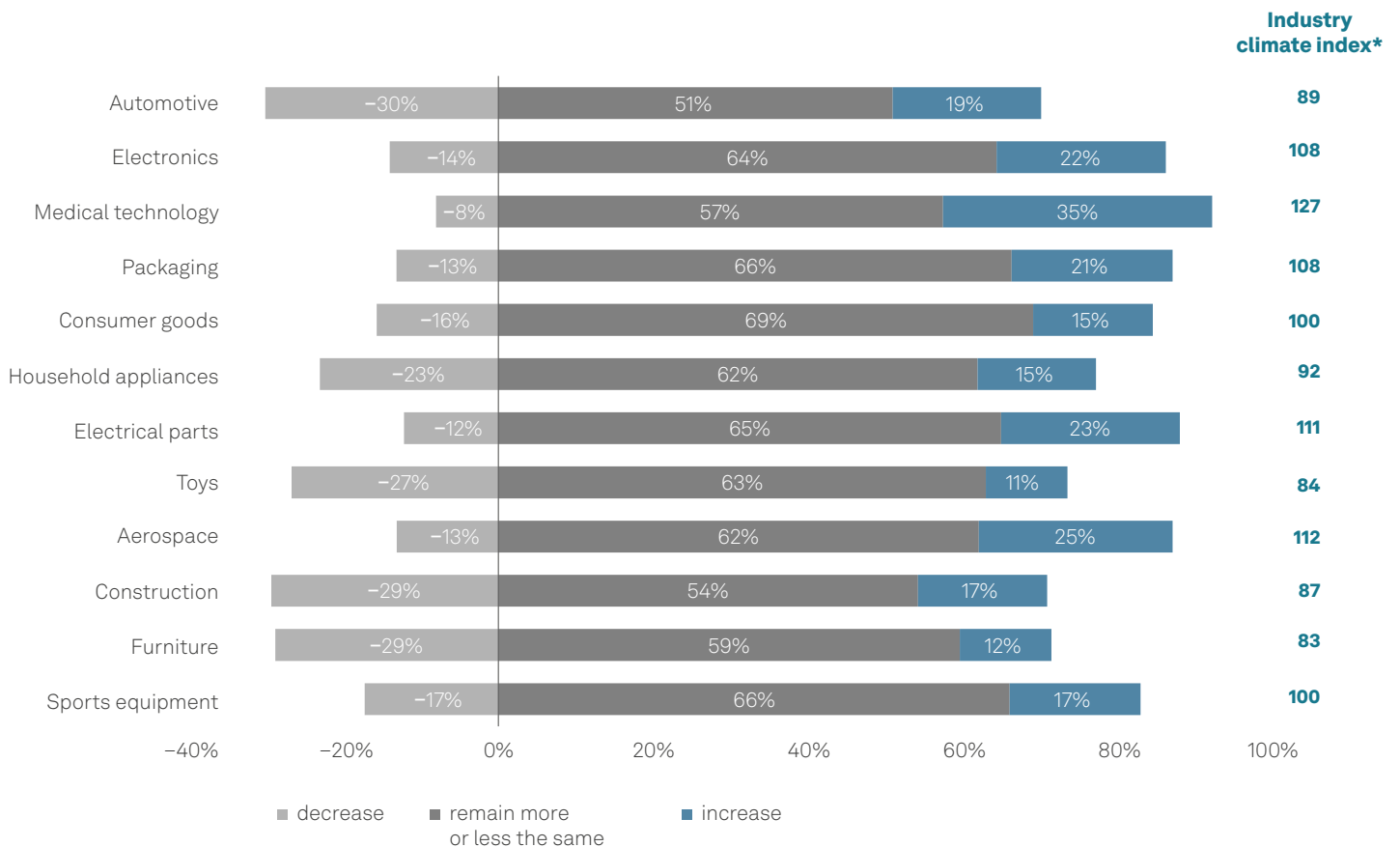


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4. How do you expect incoming orders from the following industries to develop in your company in the next 12 months?

The rather positive expectations regarding the next 12 months are also reflected in the answers to this question: for 7 out of 12 customer industries, the climate index is average or higher than average, with the medical technology sector standing out clearly with over a third of respondents expecting an increase in orders from this sector. In contrast, respondents are rather pessimistic about the development of the order situation in the household appliances, automotive, construction, furniture and toys sectors.

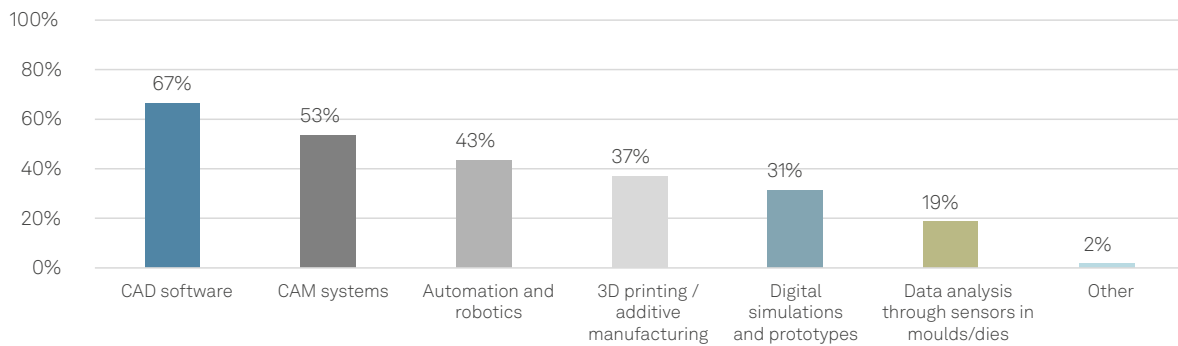


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5. What percentage of the companies surveyed deal with the following digitalisation topics?

CAD software is the top digitalisation topic, with around two thirds of respondents affirming that they actively deal with it. Some way behind CAD software, CAM systems come in second, automation and robotics in third place. Around a third of respondents respectively state that they work on the topics of 3D printing and digital simulations/prototypes, while data analysis through sensors came in last place with only around a fifth of respondents selecting this answer.



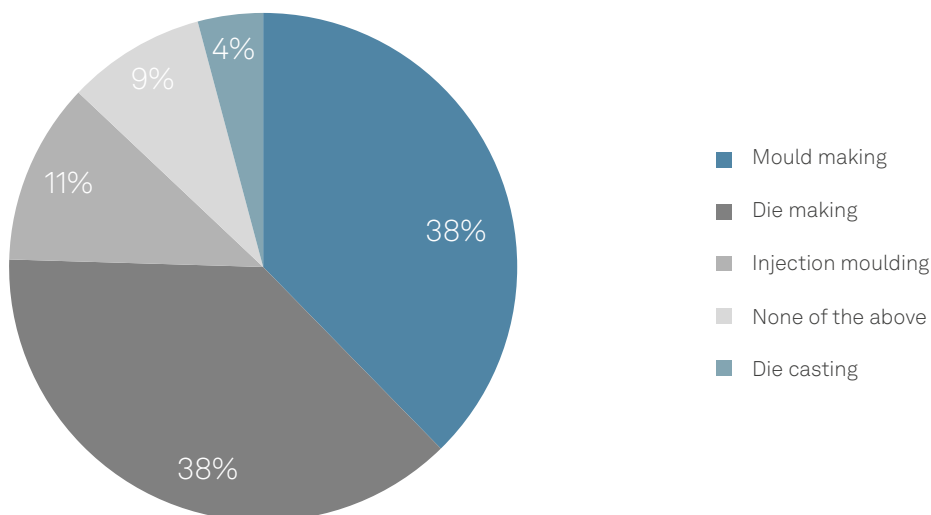


Market barometer D/A/CH

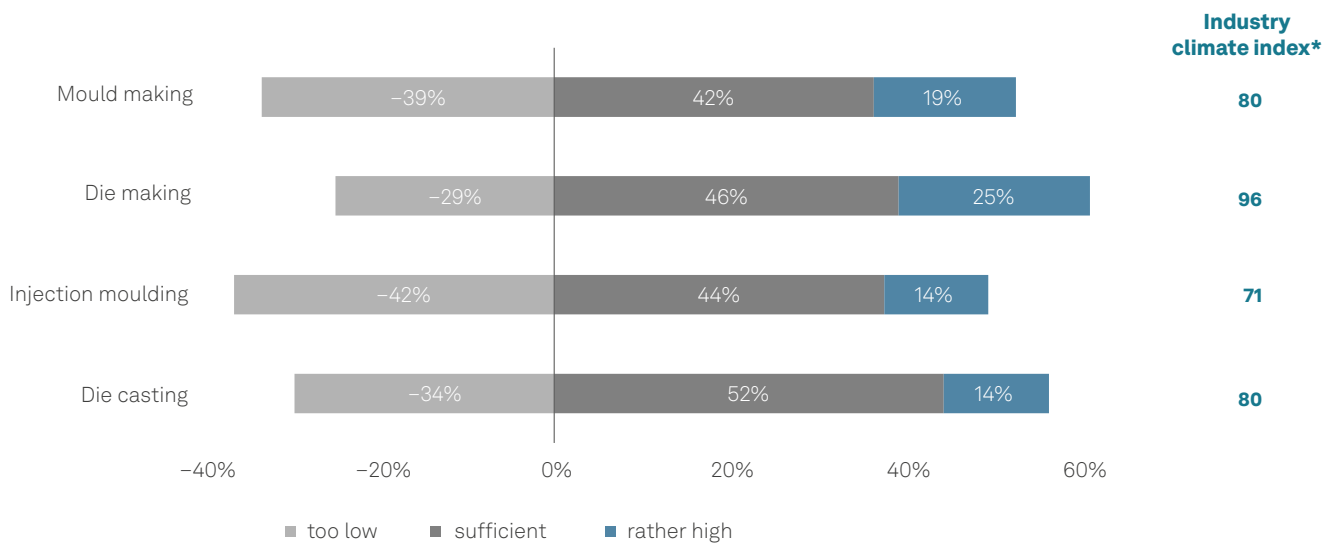
Around 1,600 of the survey participants came from Germany, Austria or Switzerland, which is why the results for these three countries are presented separately below and compared with the overall European values:

The industry climate index for the current situation and also the one for the next 12 months (questions 2 and 3) in these three countries are significantly lower in the mould making and injection moulding sectors than in Europe in general, while the die making and die casting sectors achieve similar values. The order trend with regard to individual customer industries (question 4) is also viewed more negatively in Germany, Austria and Switzerland than in Europe as a whole: here, only 3 out of 12 sectors achieve an index value that indicates optimism. The digitalisation topics mentioned (question 5) have the same ranking in the three countries as in Europe as a whole, but all topics except CAD software and CAM systems achieve significantly higher values.

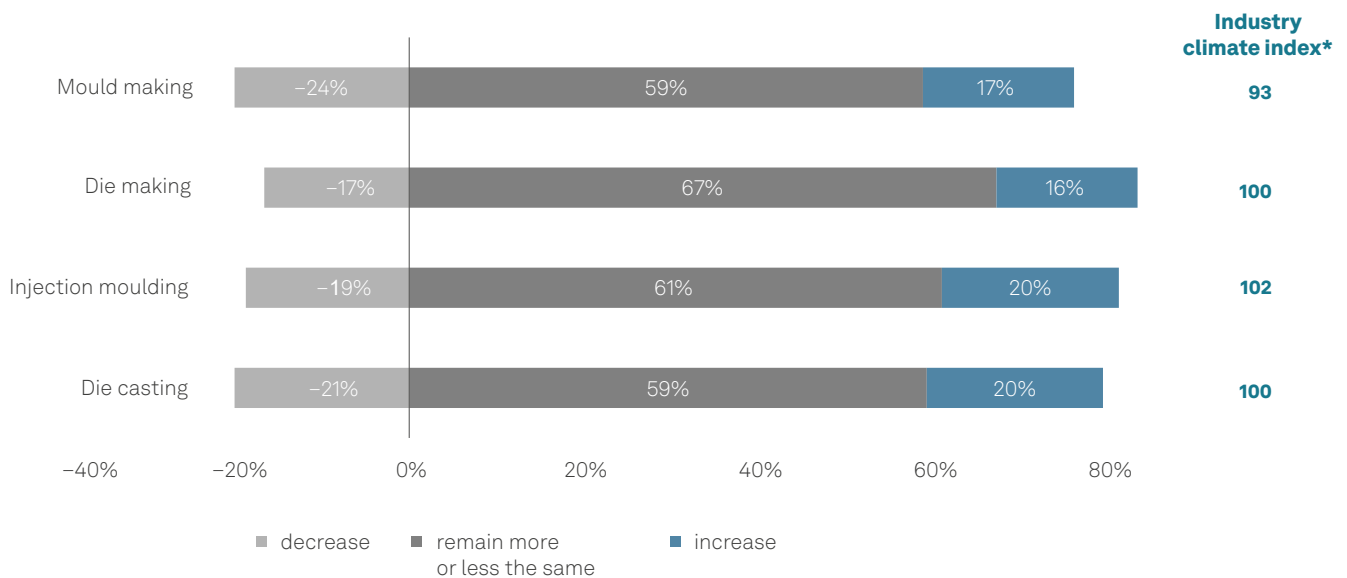
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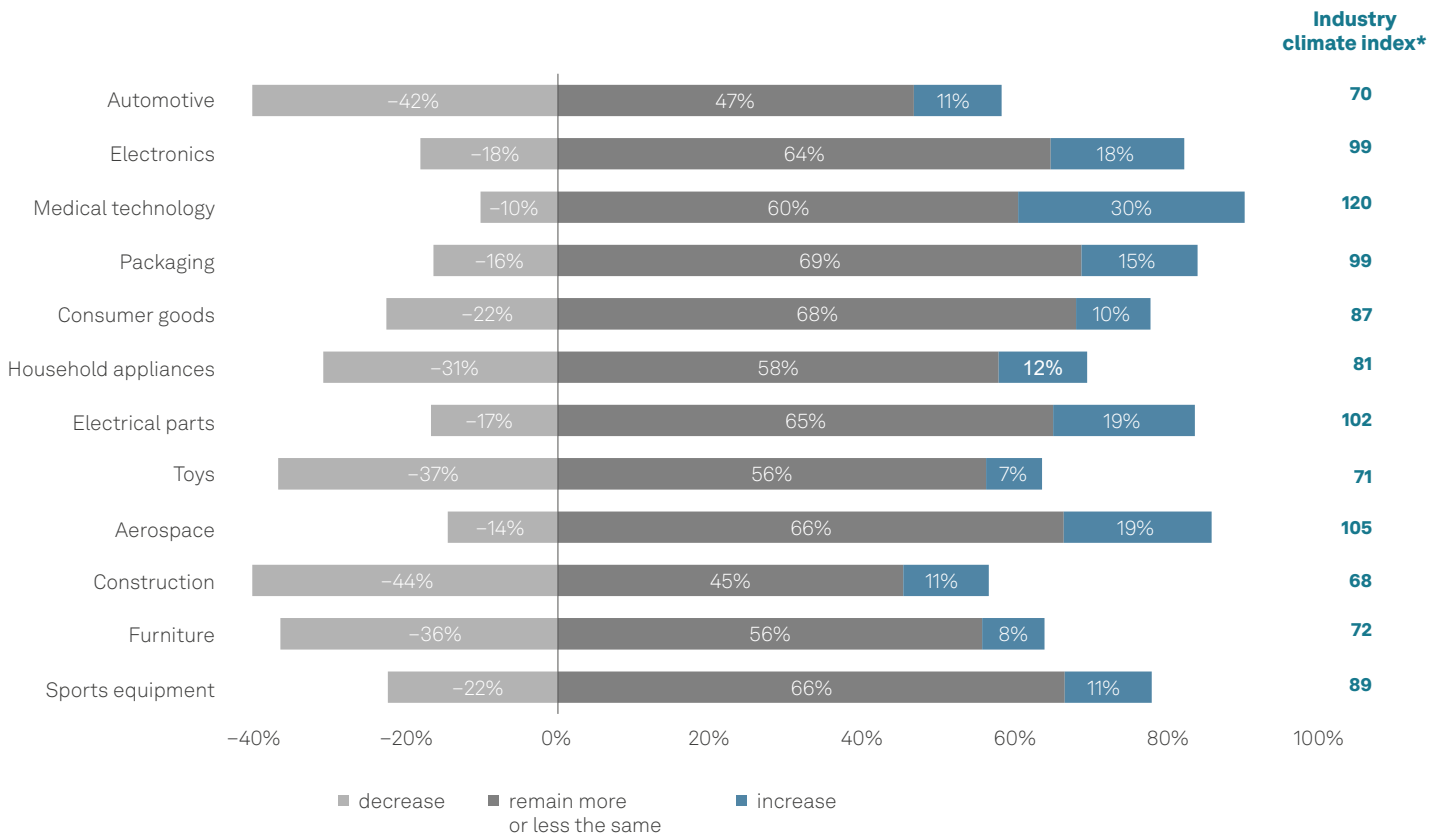
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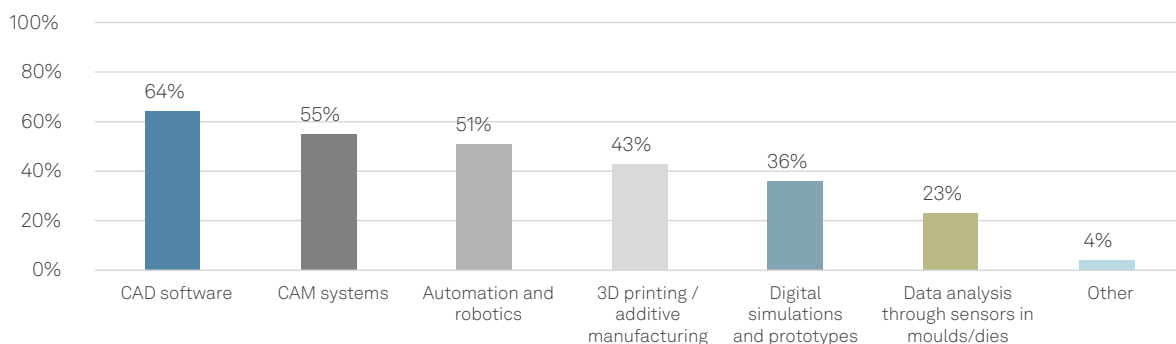
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