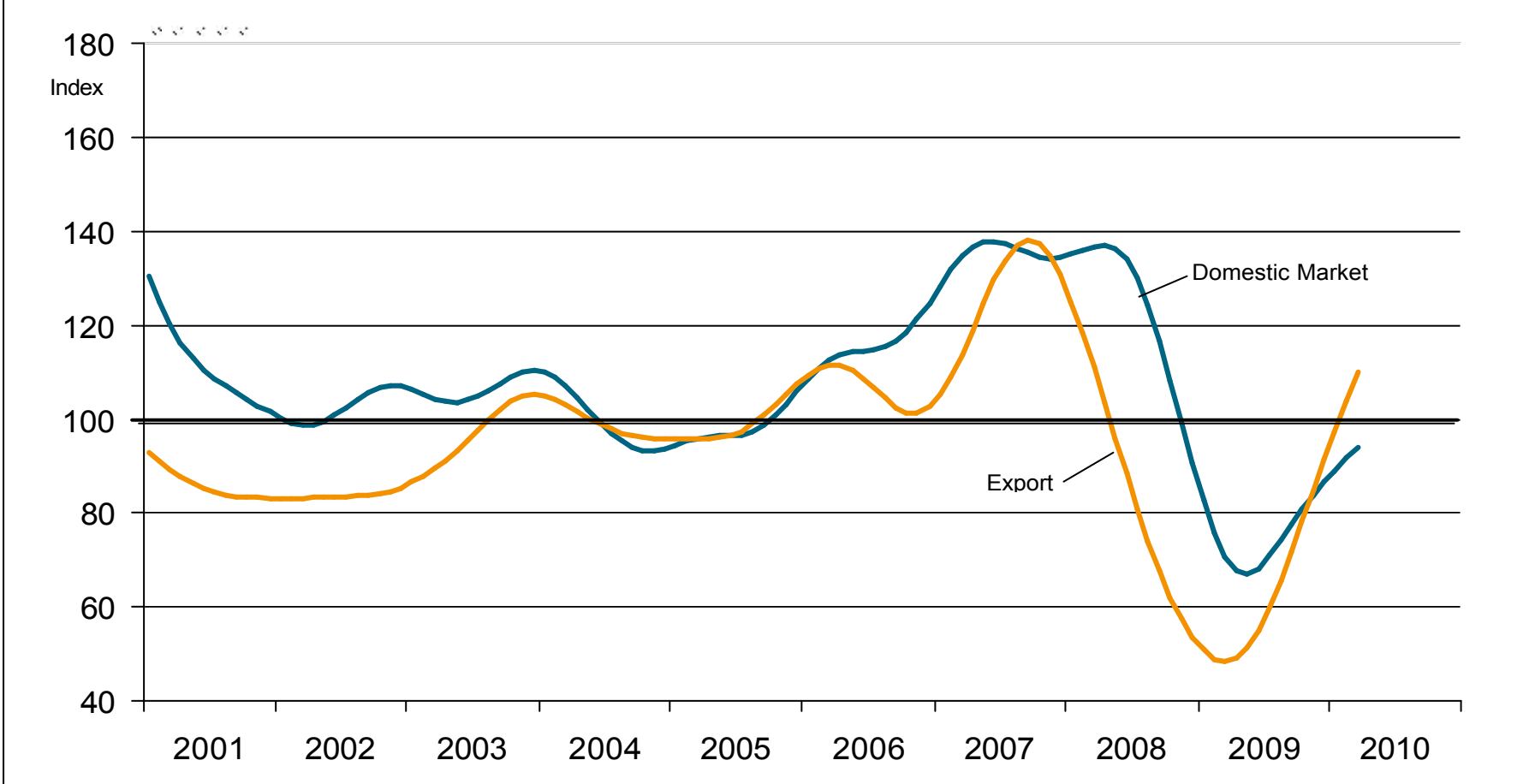
A vertical rectangular image on the left side of the page shows a single water droplet falling into a pool of water, creating concentric ripples. The image is in shades of blue and white.

Review Plastics and Rubber Machinery 2009



New Orders* Domestic Market and Export

Volume, seasonally adjusted, smoothed line, Index 2005 = 100



Core Machinery

* Based on reports by members to VDMA

Source: VDMA



2009 – Review

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• New Orders: (Change in %)	21	-22	-28
• Domestic Market:	21	-4	-35
• Export Total:	22	-28	-24
• Euro-Countries:	17	-21	-38
• Orders on Hand (Months):	5,5	5,5	4,1
• Capacity Utilisation (%):	96	90	64
• Production (Mill. €):	5.240	5.541	3.806
Change over previous year (%)	(7,5)	(5,7)	(-31,3)
• Export (Mill. €):	3.815	3.989	2.637
Change over previous year (%)	(6,5)	(4,6)	(-33,9)
• Export Share (%):	72,8	72,0	69,3

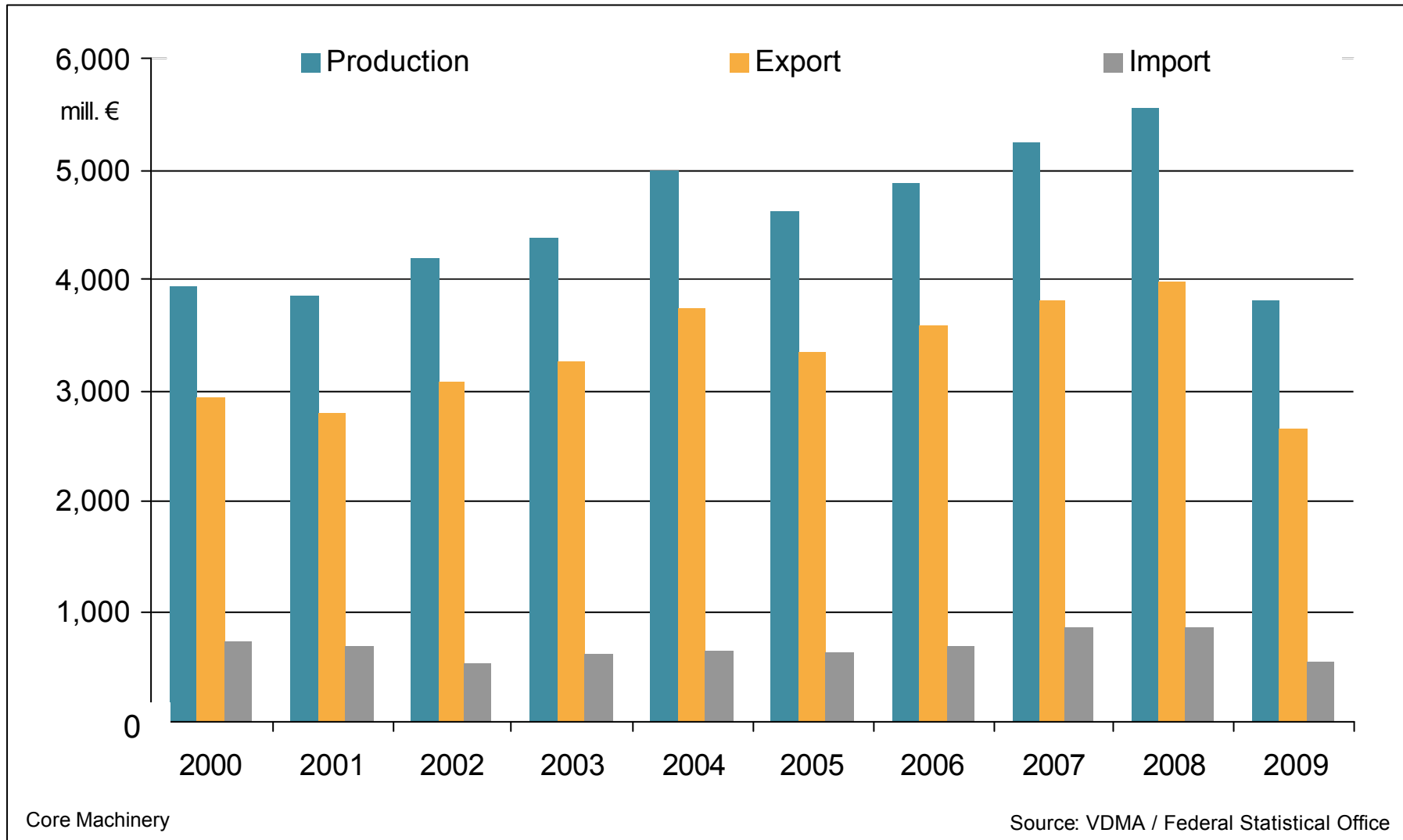


2009 - Review

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Import (Mill. €):	840	851	539
Change over previous year (%)	(22,6)	(1,3)	(-36,7)
• Domestic Market (Mill. €):	2.265	2.403	1.708
Change over previous year (%)	(14,5)	(6,1)	(-28,9)
• Trade Balance (Mill. €):	2.975	3.138	2.098
Change over previous year (%)	(2,6)	(5,5)	(-33,1)
• Share of Import in Domestic Market (%):	37,1	35,4	31,6
• Work Force	31.500	33.000	31.350 *



Production - Export - Import





2009 - Review

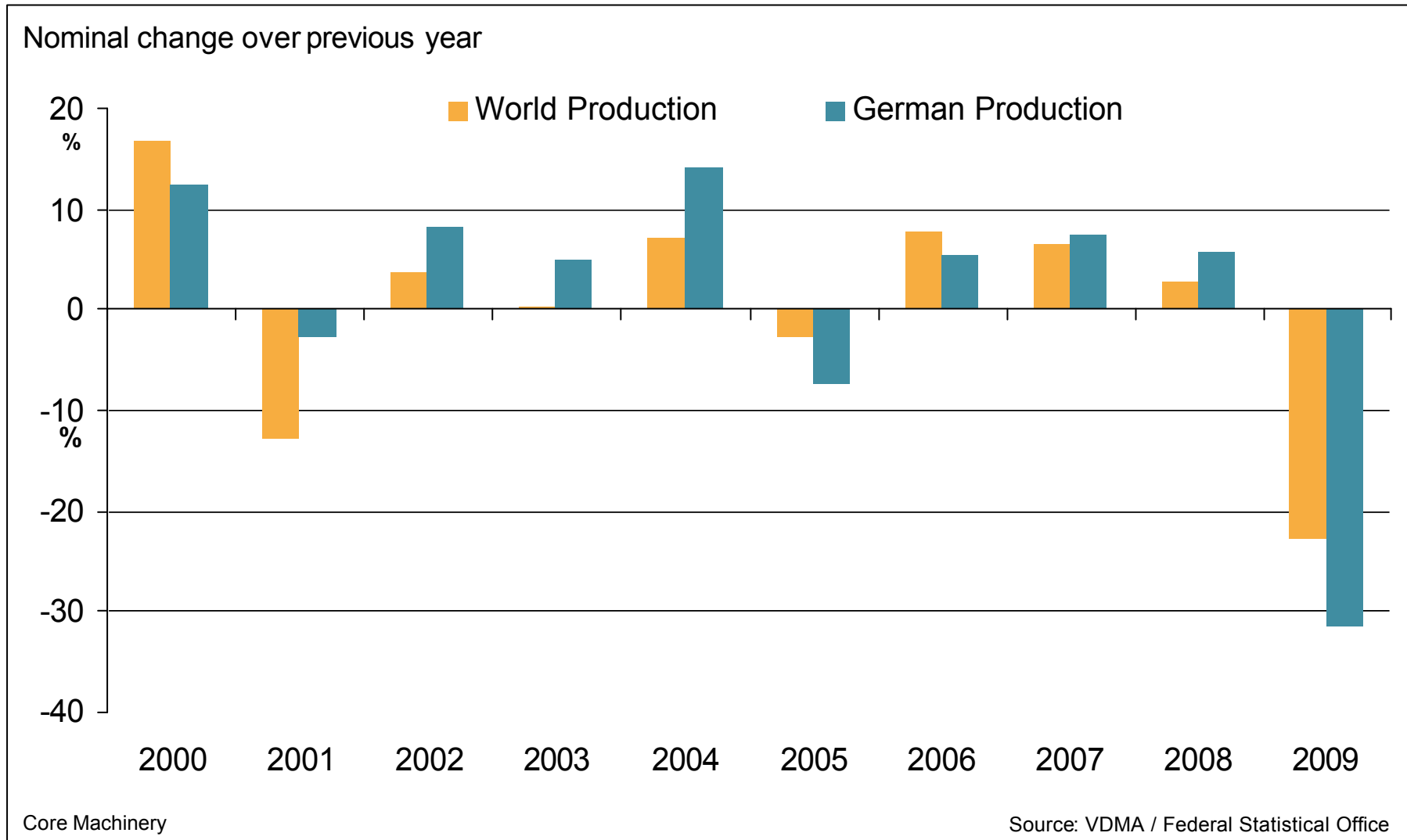
	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Core Machinery (Mio. €):	5.240	5.541	3.806
Change over previous year (%)	(7,5)	(5,7)	(-31,3)
• Moulds and Dies (Mio. €):	1.897	2.057	1.808
Change over previous year (%)	(2,5)	(8,4)	(-12,1)
• Resin- and Parts´ Handling (Mio. €):	698	759	540
Change over previous year (%)	(11,9)	(8,7)	(-28,9)
• Flexographic printing machines for films (Mio. €):	176	138	145
Change over previous year (%)	(-2,4)	(-21,6)	(5,1)
• Total (Mio. €):	8.011	8.495	6.299
Change over previous year (%)	(6,4)	(6,0)	(-25,9)

Core Machinery

Source: VDMA



Leading in World Production





Leading in World Production

Year	World Production (Mio. €)	Shares of particular countries (%)				
		Germany	China	Italy	USA	Japan
2005	18.542	24,9	12,7	12,9	9,6	9,3
2006	19.983	24,4	13,5	12,2	9,1	8,7
2007	21.257	24,7	15,9	12,7	7,8	7,0
2008	21.863	25,3	19,1	12,0	7,2	6,0
2009	16.881*	22,6	23,5	12,1	6,5	4,1

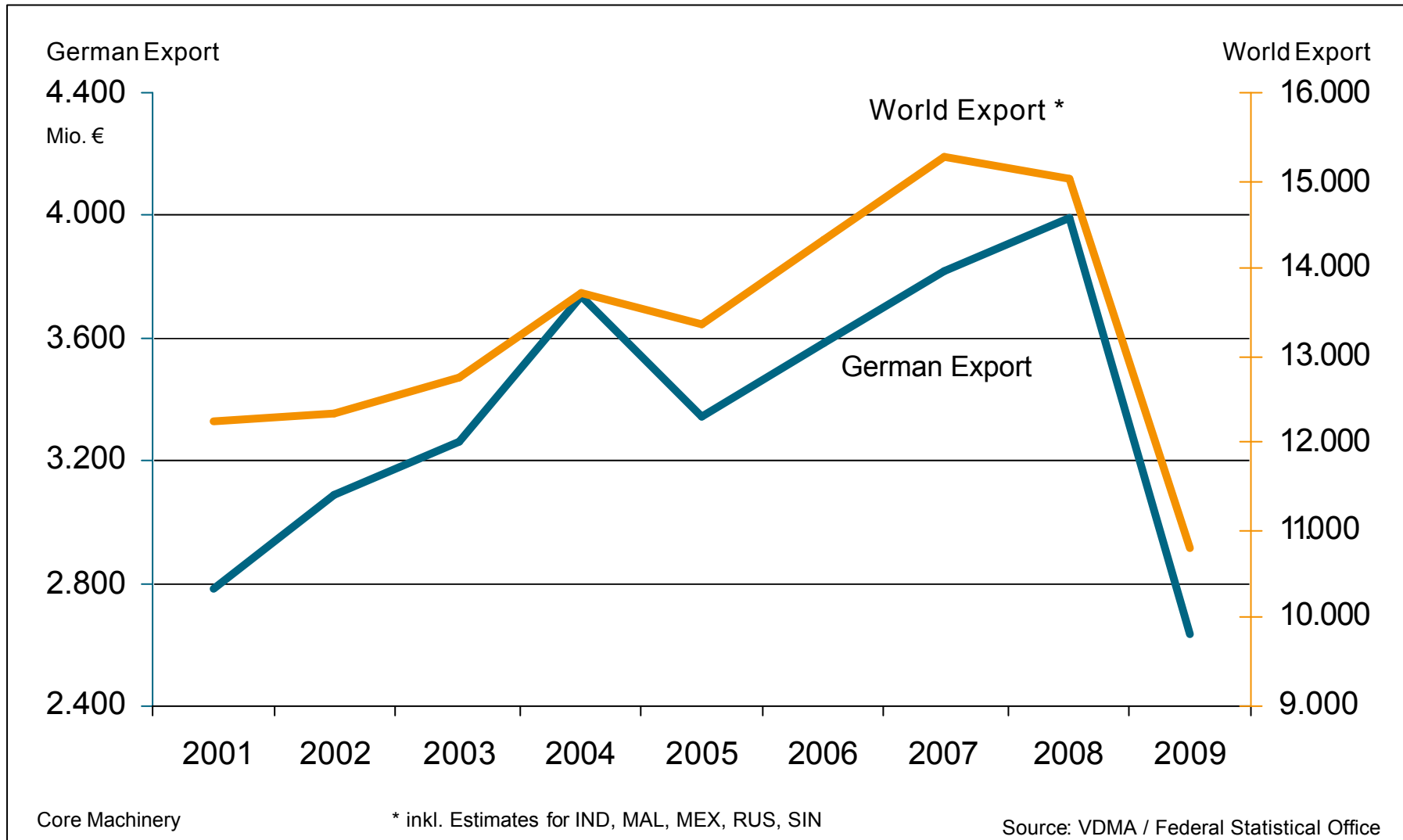
Core Machinery

*Estimate

Source: VDMA / Federal Statistical Office



Still Number One in World Export





Still Number One in World Export

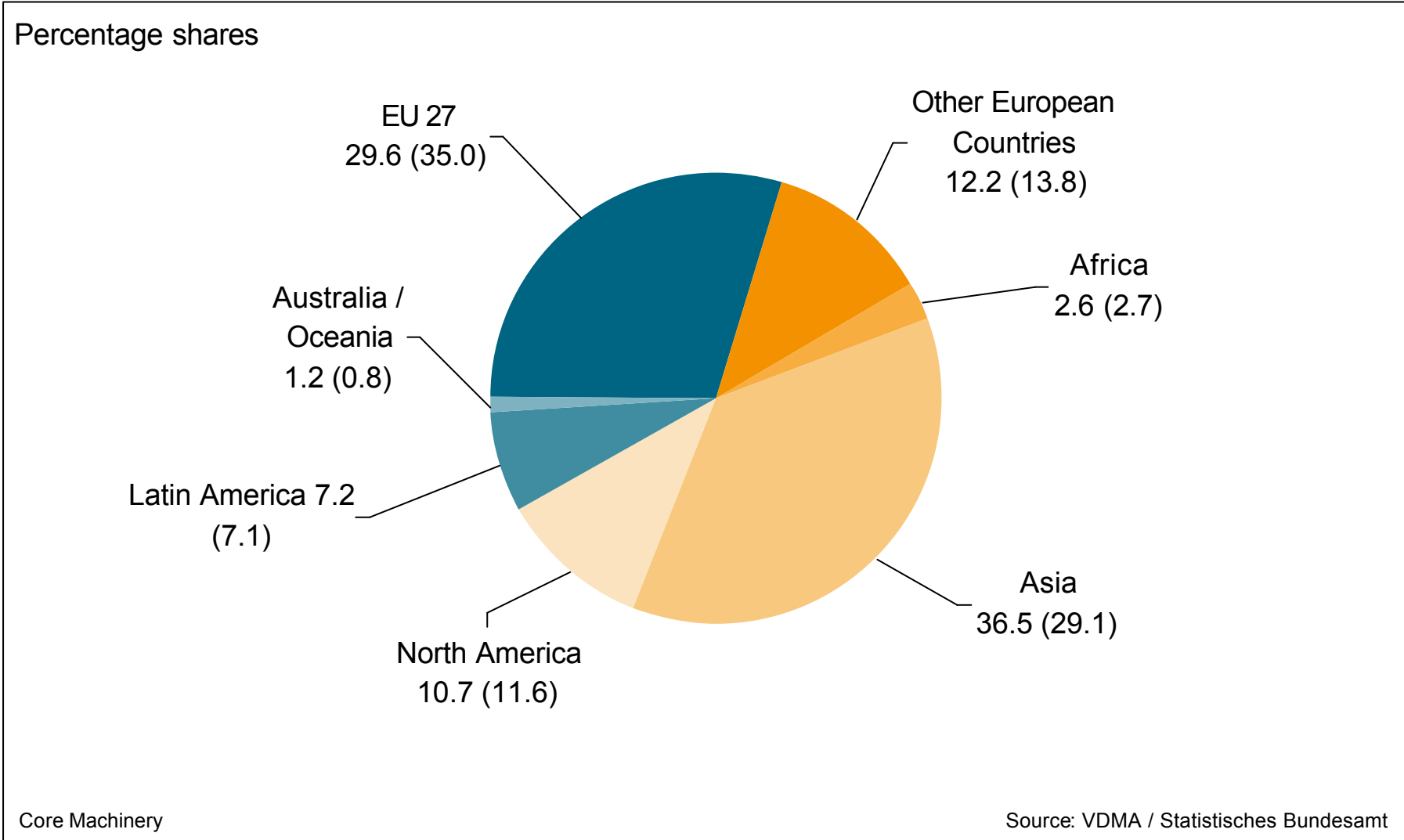
Year	World Export (Mio. €)	Shares of particular countries (%)				
		Germany	China	Italy	USA	Japan
2005	13.725	27,2	3,2	10,8	6,1	15,1
2006	14.341	25,0	5,8	10,7	7,0	12,9
2007	15.260	25,0	6,9	12,3	6,5	10,9
2008	15.037	26,5	8,6	11,7	5,9	11,2
2009	10.811 *	24,4	9,0	11,2	7,5	10,7

Core Machinery

* incl. Estimates for IND, MAL, MEX, SIN, BRAS; HK

Quelle: VDMA / Nationale Statistische Ämter

Export to Regions 2009 (2008)





Export to European Markets

	<u>2007</u>	<u>2008</u>	<u>2009</u>
EU-27-Countries			
• Shares (%):	38,3	35,0	29,6
• Value (Mio. €):	1.461	1.396	781
Change over previous year (%)	(11,5)	(-4,5)	(-44,0)
Other European Countries			
• Shares (%):	14,2	13,8	12,2
• Value (Mio. €):	541	549	321
Change over previous year (%)	(-3,4)	(1,4)	(-41,5)



Export to the Americas

	<u>2007</u>	<u>2008</u>	<u>2009</u>
North America			
• Shares(%) :	10,5	11,6	10,7
• Value (Mio. €) :	402	463	283
Change over previous year (%)	(-15,0)	(15,1)	(-38,7)
Thereof:			
• USA (Mio. €) :	373	443	258
Change over previous year (%)	(-14,9)	(18,7)	(-41,7)
Central- and South America			
• Shares (%) :	7,8	7,1	7,2
• Value (Mio. €) :	296	283	190
Change over previous year (%)	(23,3)	(-4,4)	(-32,9)

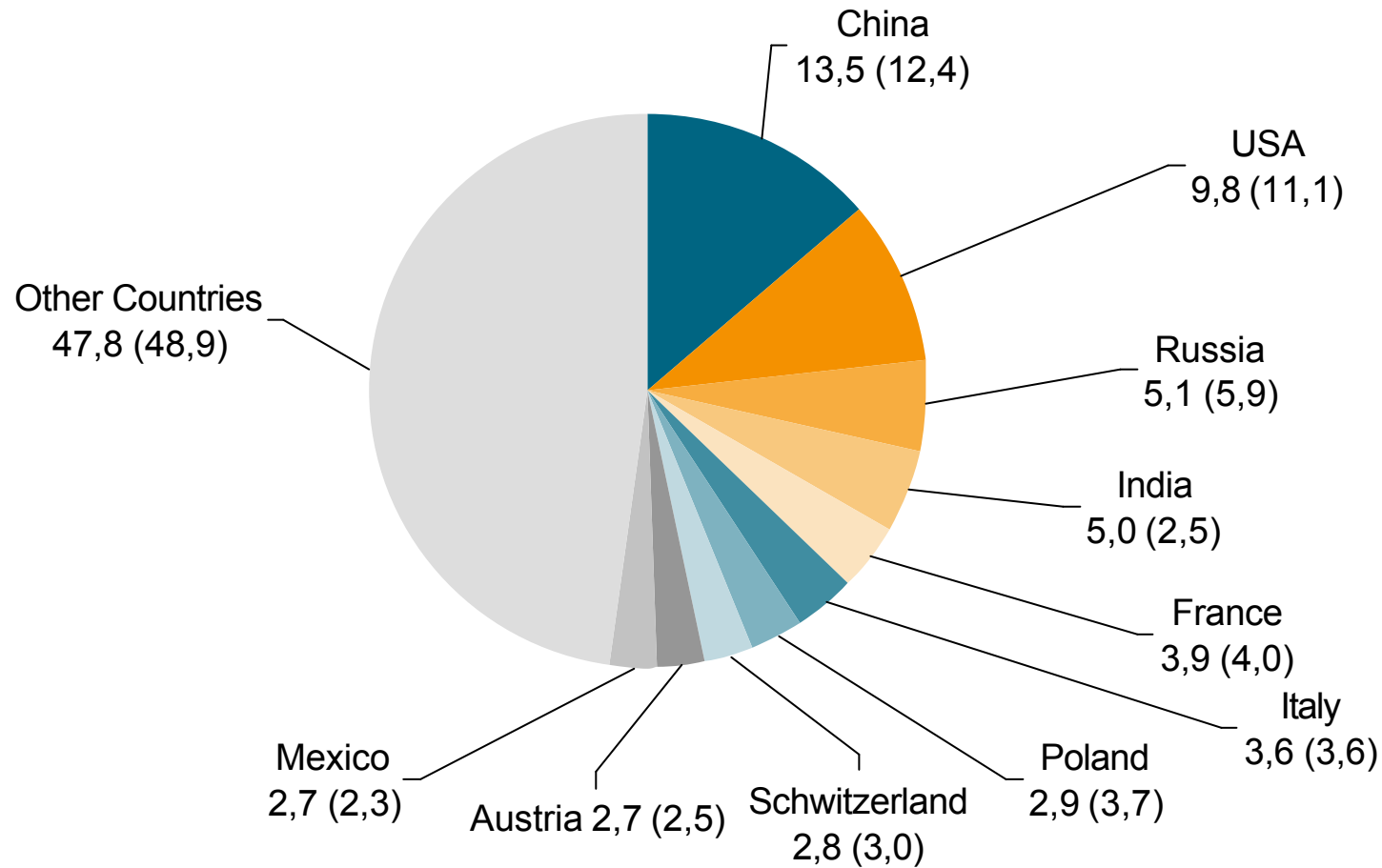


Export to Asia

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Shares (%) :	26,2	29,1	36,5
• Value (Mio. €) :	1.001	1.163	963
Change over previous year (%)	(10,8)	(16,2)	(-17,2)
Thereof:			
Saudi-Arabia (Mio. €) :	75	86	65
Change over previous year (%)	(1,3)	(13,8)	(-23,8)
India (Mio. €) :	72	101	131
Change over previous year (%)	(38,7)	(41,2)	(29,8)
ASEAN (Mio. €) :	135	166	160
Change over previous year (%)	(8,6)	(23,4)	(-3,6)
China (Mio. €) :	347	495	357
Change over previous year (%)	(20,1)	(42,6)	(-27,8)

Exports to Major Destinations 2009 (2008)

Percentage shares





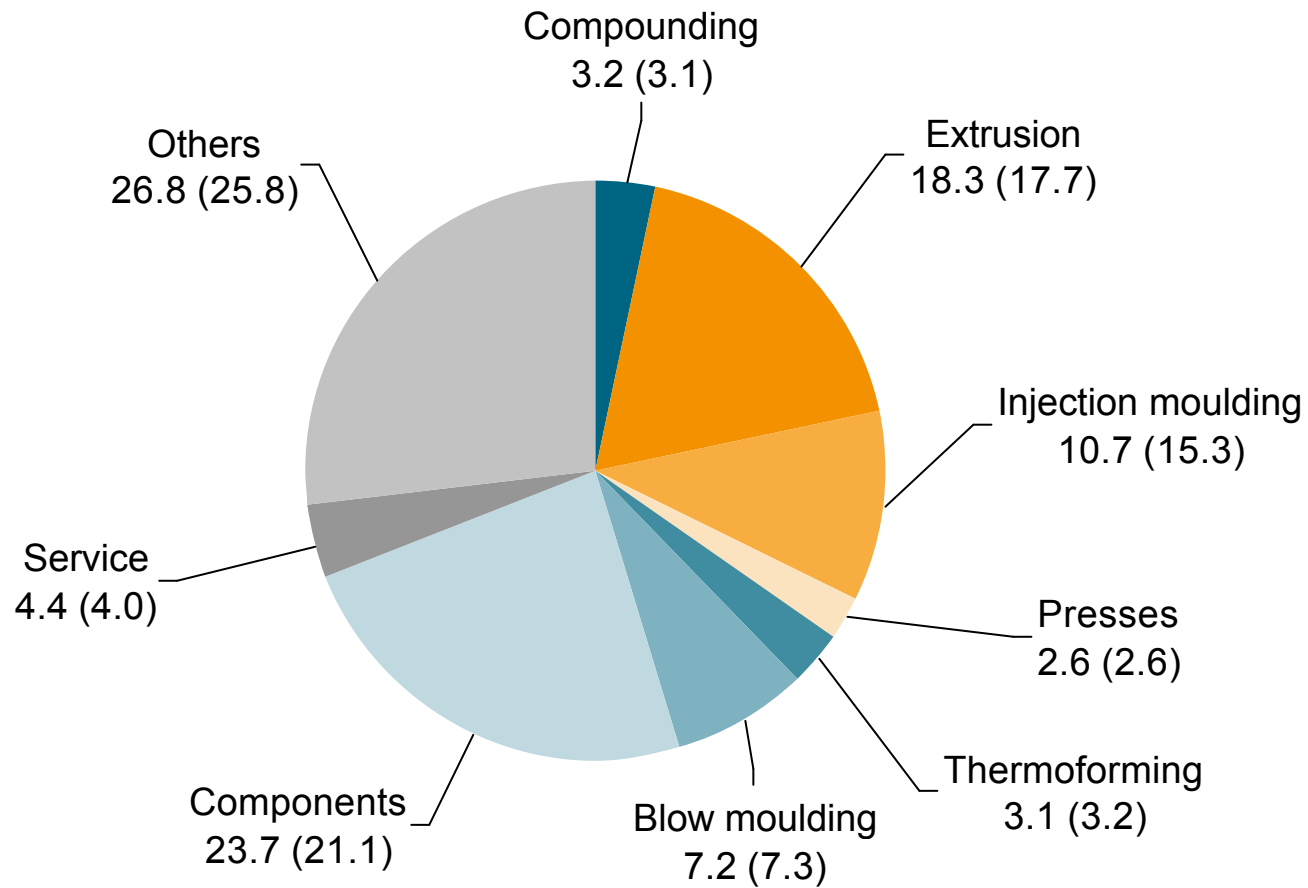
TOP-10- Destinations 2009 (2008)

	2009 (Mio. €)	2009 / 2008 (%)	Shares of Export (%)	Position	
				2009	2008
Total Export	2.637	-33,9	100,0		
China	357	-27,8	13,5	1	1
USA	258	-41,7	9,8	2	2
Russia	136	-42,1	5,1	3	3
India	131	29,8	5,0	4	12
France	102	-36,7	3,9	5	4
Italy	96	-33,7	3,6	6	6
Poland	77	-47,5	2,9	7	5
Switzerland	75	-38,2	2,8	8	7
Austria	72	-27,5	2,7	9	13
Mexico	72	-22,0	2,7	10	15
			52,0		

Production 2009 (2008)

Shares of Machinery Types

Percentage shares



Core Machinery

Source: VDMA / Federal Statistical Office



Injection Moulding Machines

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Production (Mio. €):	894	849	406
Change over previous year (%)	(2,5)	(-5,0)	(-52,2)
• Share in Production Total (%):	17,1	15,3	10,7
• Export (Mio. €):	715	674	382
Change over previous year (%)	(0,4)	(-5,7)	(-43,3)
• Export share (%):	79,9	79,4	94,1



Extruders and Extrusion Lines

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Production (Mio. €):	914	978	696
Change over previous year (%)	(5,7)	(7,0)	(-28,8)
• Share in Production Total (%):	17,5	17,6	18,3
• Export (Mio. €):	669	651	446
Change over previous year (%)	(6,6)	(-2,7)	(-31,5)
• Export share (%):	73,1	66,6	64,1



Blow Moulding Machines

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Production (Mio. €):	368	402	276
Change over previous year(%)	(15,1)	(9,1)	(-31,3)
• Share in Production Total (%):	7,0	7,3	7,2
• Export (Mio. €):	222	179	207
Changes over previous year (%)	(7,2)	(-19,7)	(15,7)
• Export share (%):	60,4	44,5	74,9



Thermoforming and Vacuumforming Machines

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Production (Mio. €):	184	175	119
Change over previous year (%)	(6,7)	(-4,7)	(-32,1)
• Share in Production Total (%):	3,5	3,2	3,1
• Export (Mio. €):	166	160	94
Change over previous year (%)	(-3,1)	(-3,5)	(-41,2)
• Export share (%):	90,3	91,4	79,0



Presses

	<u>2007</u>	<u>2008</u>	<u>2009</u>
• Production (Mio. €):	121	142	97
Change over previous year (%)	(-10,6)	(17,0)	(-31,4)
• Share in Production Total (%) :	2,3	2,5	2,6
• Export (Mio. €):	45	52	57
Change over previous year (%)	(-18,5)	(16,1)	(9,3)
• Export share (%) :	37,1	36,6	58,6



Situation and Forecast

- **New Orders January – March 2010 / 2009:**

- Total 71 %
 - Domestic Market 3 %
 - Export 114 %
 - Euro- Countries 52 %

- **Forecast**

- 2010: slightly above 11 %
- 2011: just under 11 %
- Update every six months



Chances & Risks

- Financial markets susceptible to risk
- Hazard of overheating economy in threshold countries
- Prices for oil, energy and polymers on the rise
- Recovery still due to economic stimulus packages?
- Weak EURO exchange rate supports export chances



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