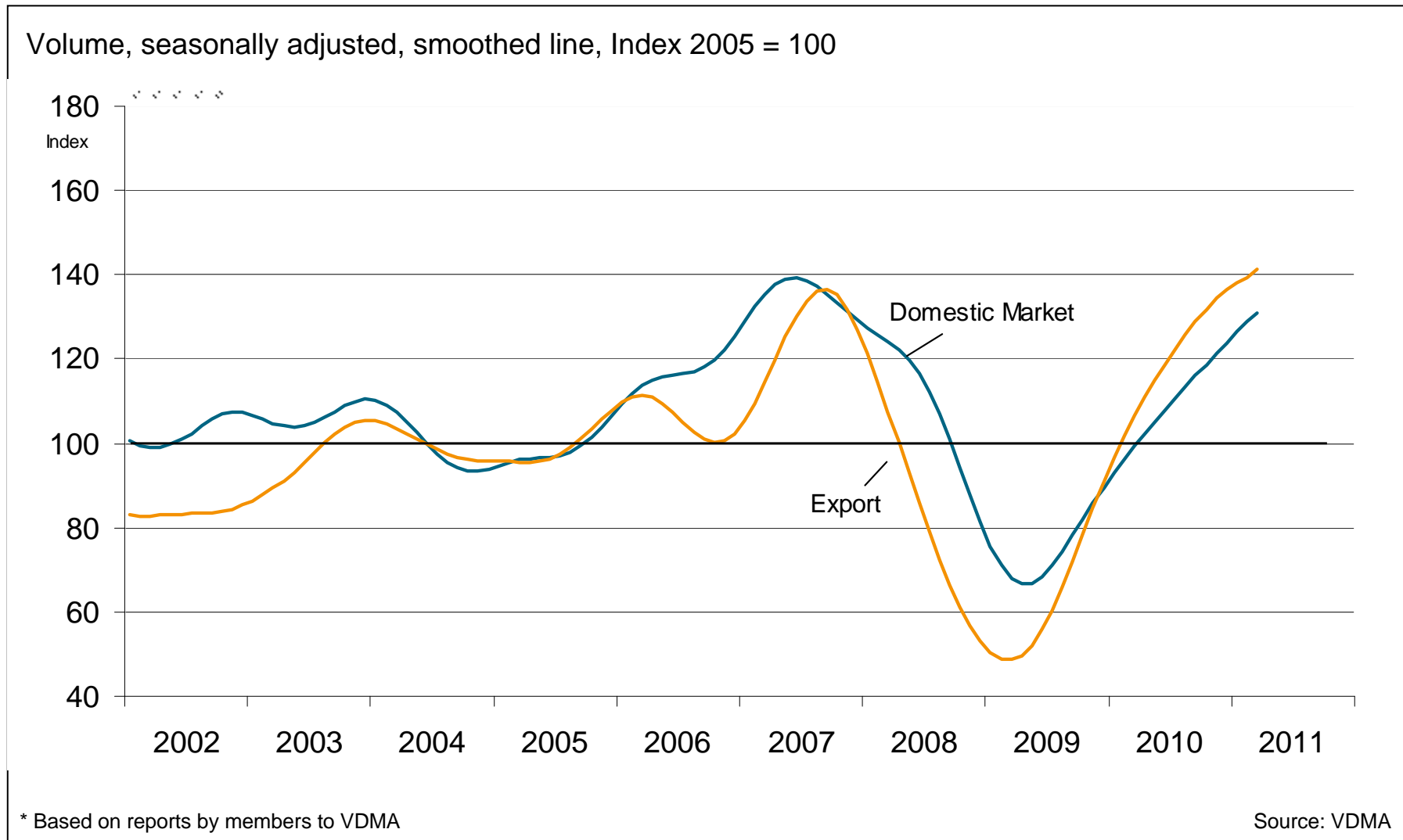




Review
Plastics and Rubber
Machinery
2010



New Orders* Domestic Market and Export





2010 – Review

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● New Orders: (Change in %)	-22	-28	75
Domestic Market:	-4	-35	50
Export Total:	-28	-24	86
Euro-Countries:	-21	-38	48
● Orders on Hand (Months):	5.5	4.1	6.7
● Capacity Utilisation (%):	90	64	88
● Production (Mio. €):	5,559	3,811	4,911
Change over previous year (%)	(6.1)	(-31.4)	(28.9)
● Export (Mio. €):	3,989	2,637	3,312
Change over previous year (%)	(4.6)	(-33.9)	(25.6)
● Export Share (%):	71.8	69.2	67.5

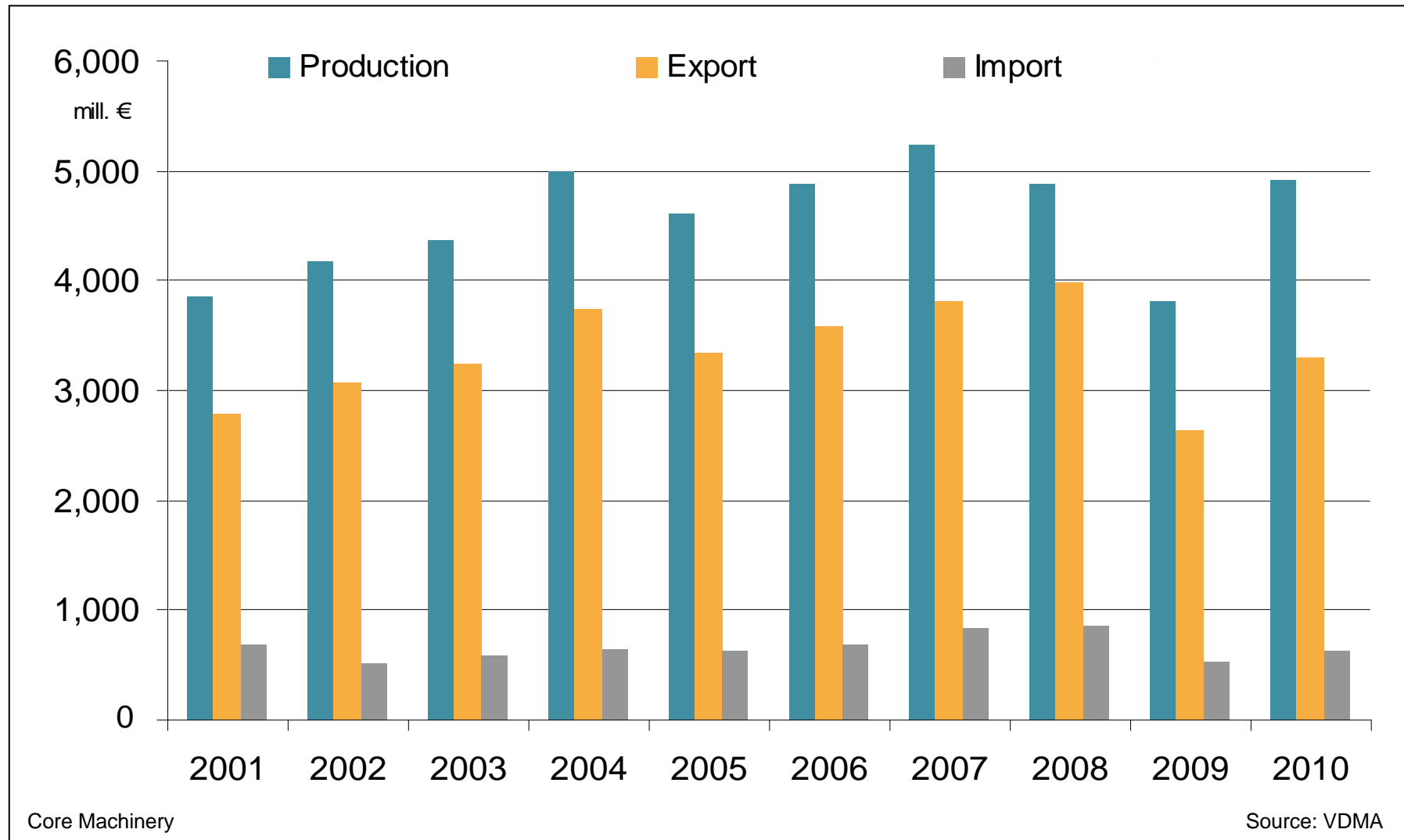


2010 - Review

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Import (Mio. €):	851	539	633
Change over previous year (%)	(1.3)	(-36.7)	(17.5)
● Domestic Market (Mio. €):	3,138	2,098	2,679
Change over previous year (%)	(5.5)	(-33.2)	(27.7)
● Trade Balance (Mio. €):	2,421	1,793	2,232
Change over previous year (%)	(6.9)	(-25.9)	(24.4)
● Share of Import in Domestic Market (%) :	35.2	30.1	28.4
● Work Force	27,807	25,209	25,713



Production - Export - Import



Core Machinery

Source: VDMA



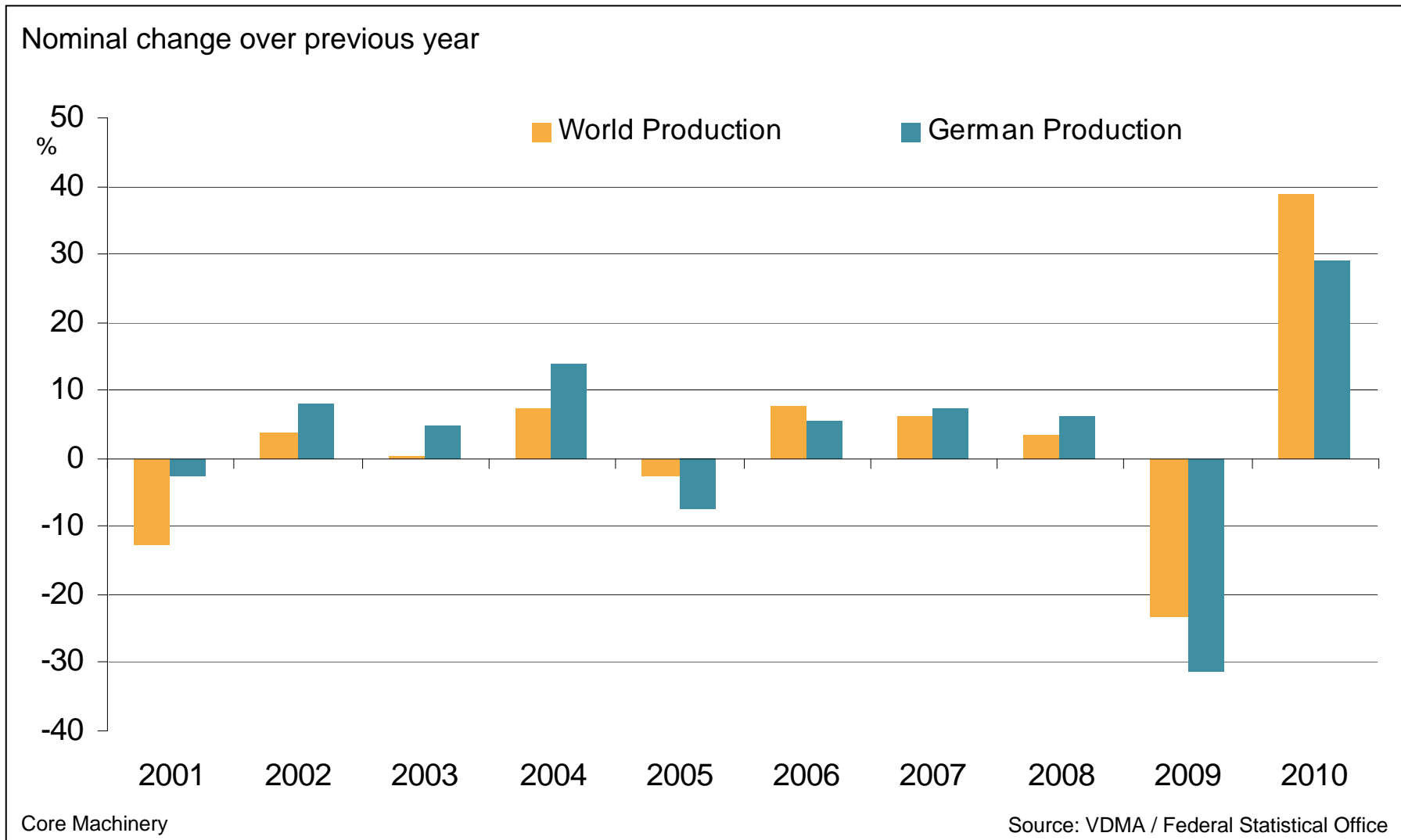
2010 - Review

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Core Machinery (Mio. €):	5,559	3,811	4,911
Change over previous year (%)	(6.1)	(-31.4)	(28.9)
● Moulds and Dies (Mio. €):	2,057	1,808	1,736
Change over previous year (%)	(8.4)	(-12.1)	(-4.0)
● Resin- and Parts´ Handling (Mio. €):	759	540	635
Change over previous year (%)	(8.7)	(-28.9)	(17.6)
● Flexographic printing machines for films (Mio. €):	138	145	178
Change over previous year (%)	(-21.6)	(5.1)	(22.7)
● Total (Mio. €):	8,513	6,304	7,460
Change over previous year (%)	(6.0)	(-25.9)	(18.3)

Source: VDMA



Leading in World Production





Leading in World Production

Year	World Production (Mio. €)	Shares of particular countries (%)				
		China	Germany	Italy	USA	Japan
2006	19,983	13.5	24.4	12.2	9.1	8.7
2007	21,257	15.9	24.7	12.7	7.8	7.0
2008	21,985	19.0	25.3	11.9	7.2	6.0
2009	16,903	23.5	22.6	12.1	6.5	4.1
2010	23,347*	29.3	21.0	9.6	5.4	5.4

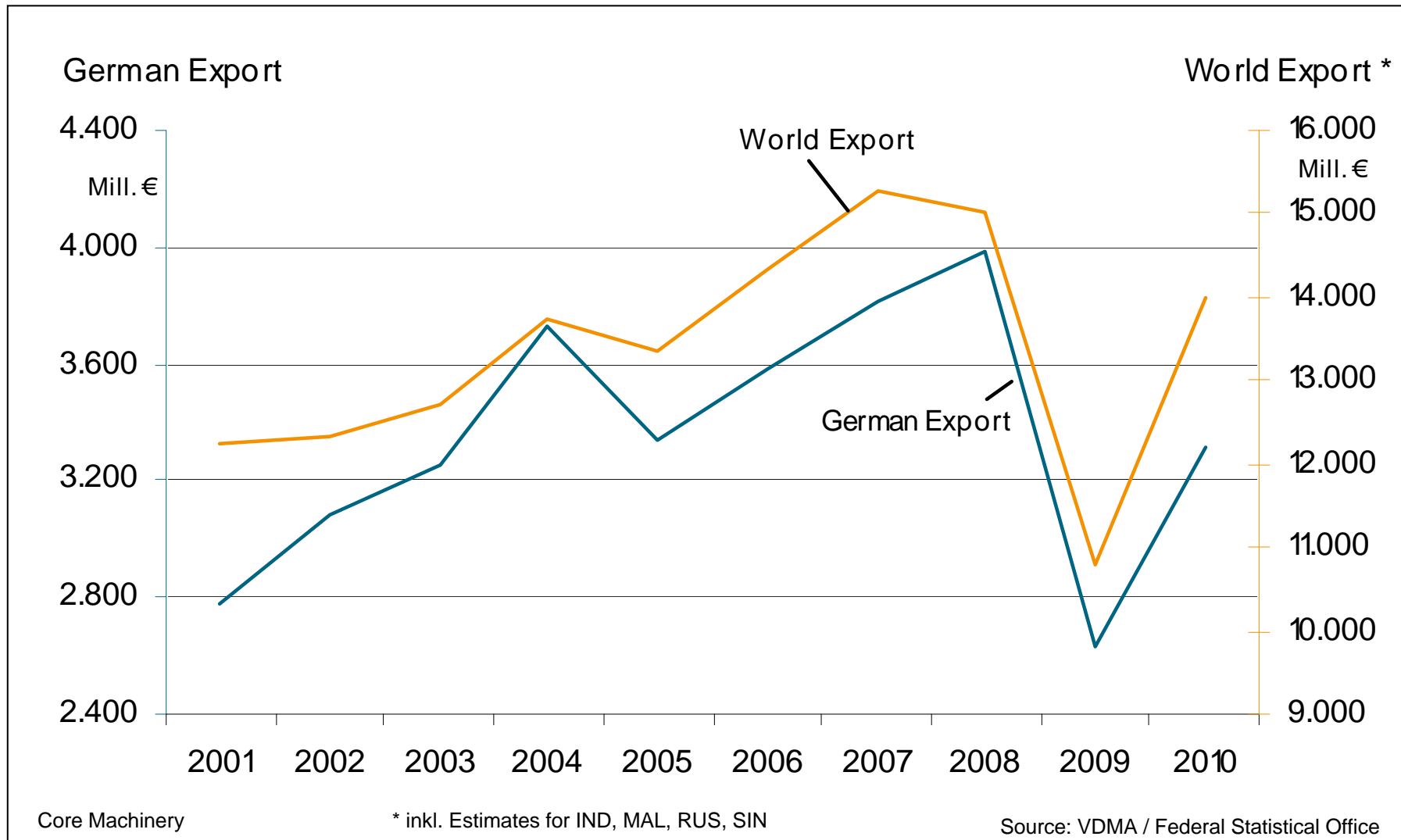
Core Machinery

*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	Japan	China	Italy	USA
2006	14,341	25.0	12.9	5.8	10.7	7.0
2007	15,260	25.0	10.9	6.9	12.3	6.5
2008	15,037	26.5	11.2	8.6	11.7	5.9
2009	10,706	24.6	10.8	9.1	11.3	7.5
2010	14,003 *	23.7	13.1	10.6	9.6	6.7

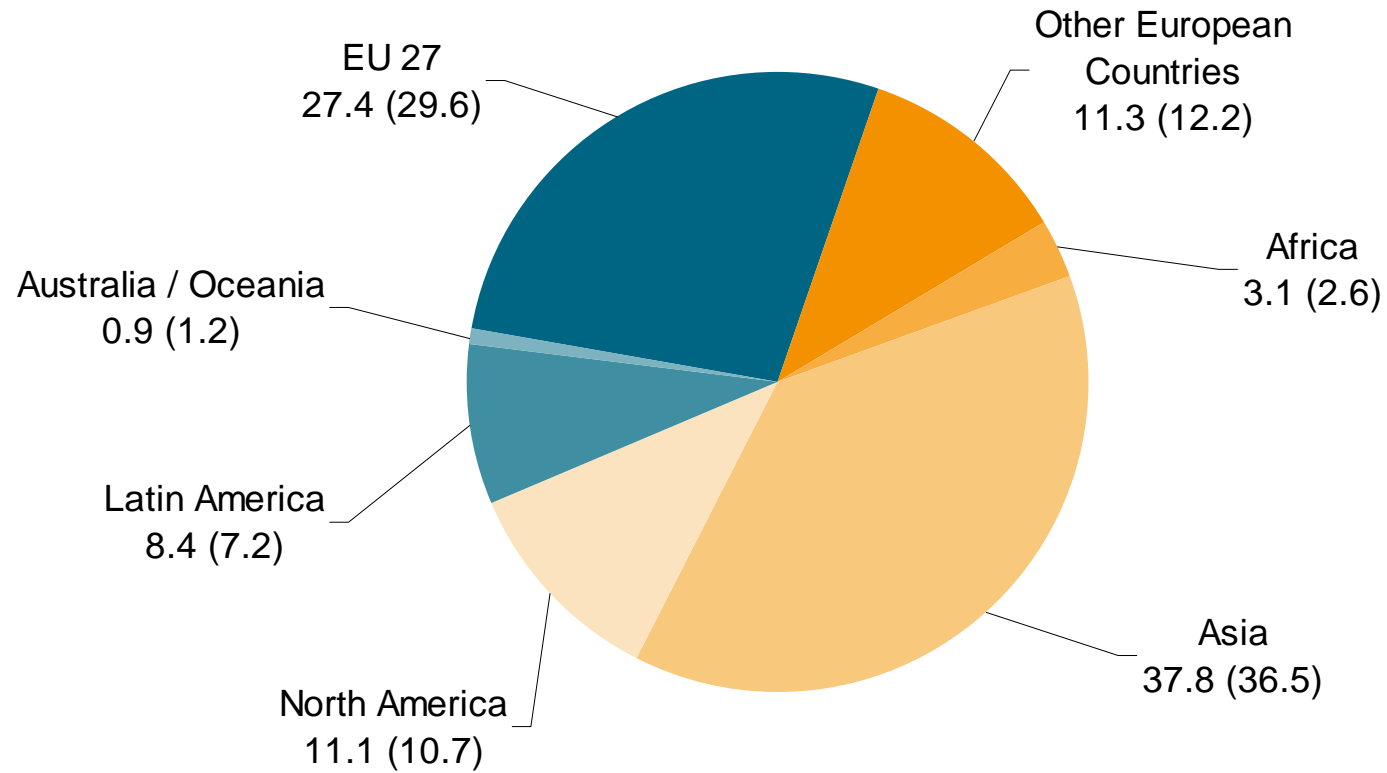
Core Machinery

* incl. Estimates for IND, MAL, RUS, SIN,

Source: VDMA / Federal Statistical Office

Export to Regions 2010 (2009)

Percentage shares





Export to European Markets

	<u>2008</u>	<u>2009</u>	<u>2010</u>
EU-27-Countries			
● Shares (%):	35.0	29.6	27.4
● Value (Mio. €):	1,396	781	909
Change over previous year (%)	(-4.5)	(-44.0)	(16,3)
Other European Countries			
● Shares (%):	13.8	12.2	11.3
● Value (Mio. €):	549	321	374
Change over previous year (%)	(1.4)	(-41.5)	(16.6)



Export to the Americas

	<u>2008</u>	<u>2009</u>	<u>2010</u>
North America			
● Shares(%) :	11.6	10.7	11.1
● Value (Mio. €) :	463	283	369
Change over previous year (%)	(15.1)	(-38.7)	(30.3)
Thereof:			
● USA (Mio. €) :			
Change over previous year (%)	443	258	338
	(18.7)	(-41.7)	(31.2)
Central- and South America			
● Shares (%) :	7,1	7.2	8.4
● Value (Mio. €) :	283	190	277
Change over previous year (%)	(-4.4)	(-32.9)	(46.0)

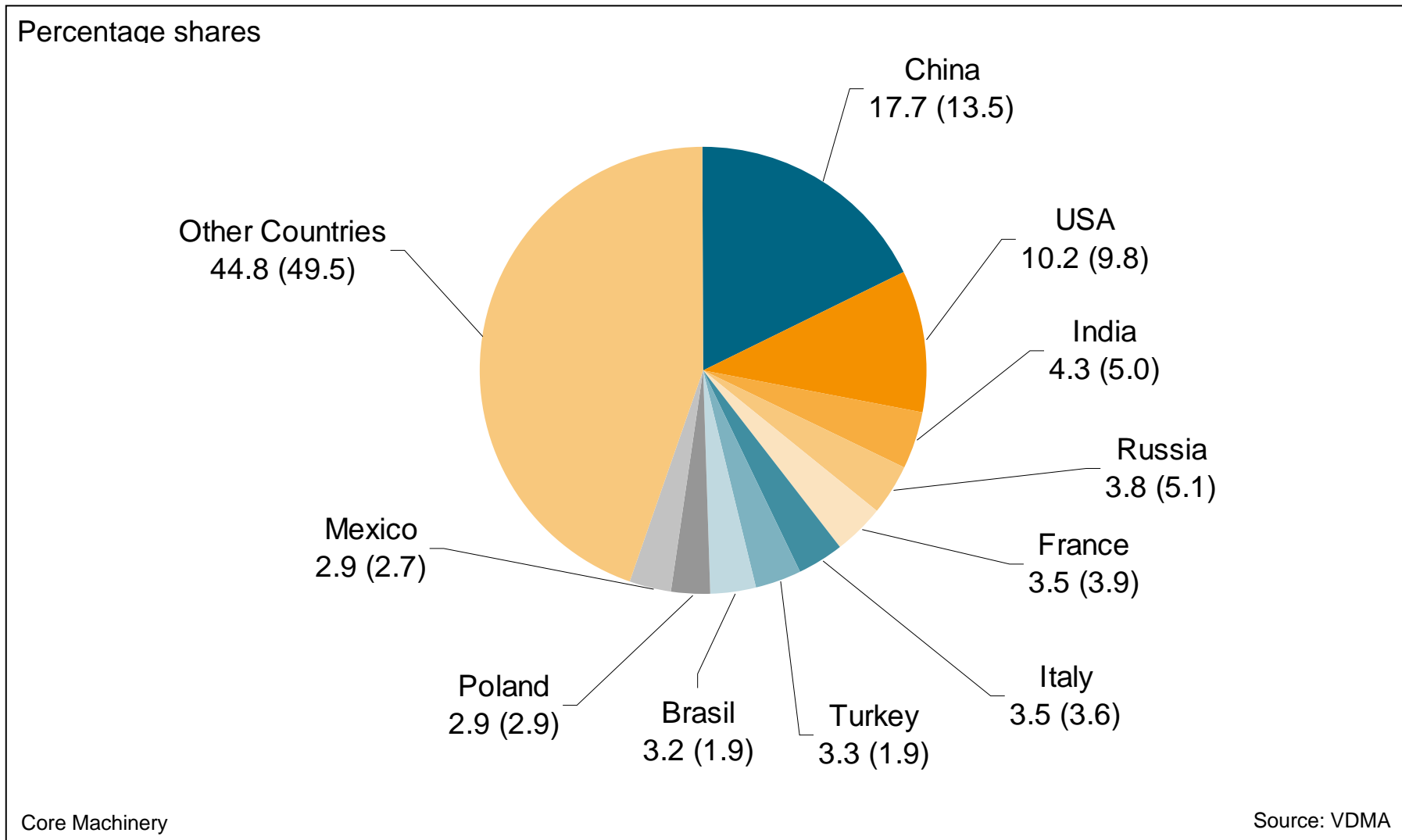


Export to Asia

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Shares (%) :	29.1	36.5	37.8
● Value (Mio. €) :	1,163	963	1,253
Change over previous year (%)	(16.2)	(-17.2)	(30.1)
Thereof:			
Saudi-Arabia (Mio. €) :	86	65	62
Change over previous year (%)	(13.8)	(-23.8)	(-4.6)
India (Mio. €) :	101	131	141
Change over previous year (%)	(41.2)	(29.8)	(7.5)
ASEAN (Mio. €) :	166	160	166
Change over previous year (%)	(23.4)	(-3.6)	(3.6)
China (Mio. €) :	495	357	587
Change over previous year (%)	(42.6)	(-27.8)	(64.4)



Exports to Major Destinations 2010 (2009)





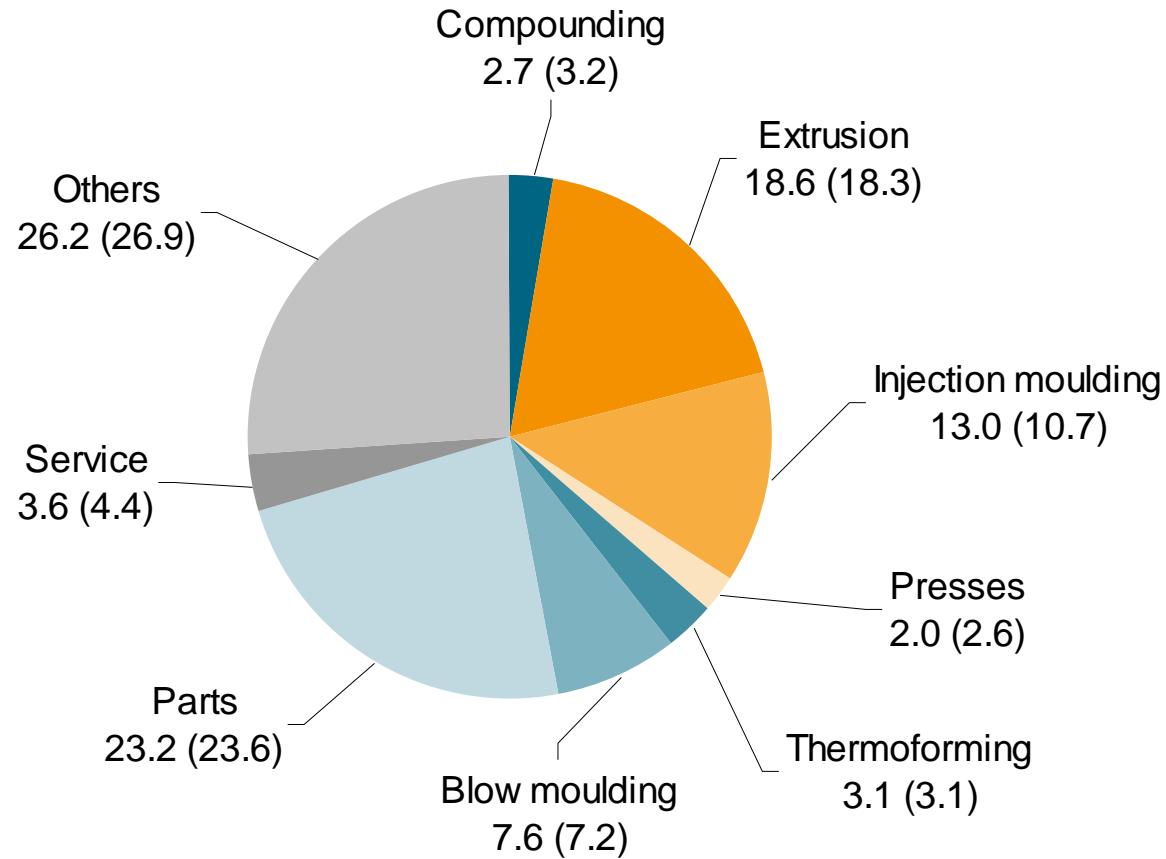
TOP-10- Destinations 2010 (2009)

	2010 (Mio. €)	2010 / 2009 (%)	Shares of Export (%)	Position 2010	2009
Total Export	3,312	25.6	100.0		
China	587	64.4	17.7	1	1
USA	338	31.2	10.2	2	2
India	141	7.5	4.3	3	4
Russia	124	-8.3	3.8	4	3
France	115	13.2	3.5	5	5
Italy	114	19.5	3.5	6	6
Turkey	109	115.7	3.3	7	17
Brazil	107	109.6	3.2	8	16
Poland	95	23.4	2.9	9	7
Mexico	95	32.2	2.9	10	10
			55.3		

Production 2010 (2009)

Shares of Machinery Types

Percentage shares



Core Machinery

Source: VDMA



Injection Moulding Machines

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Production (Mio. €):	849	406	638
Change over previous year (%)	(-5.0)	(-52.2)	(57.0)
● Share in Production Total (%) :	15.3	10.7	13.0
● Export (Mio. €):	674	382	593
Change over previous year (%)	(-5.7)	(-43.3)	(55.2)
● Export share (%) :	79.4	94.1	93.0



Extruders and Extrusion Lines

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Production (Mio. €):	978	696	912
Change over previous year (%)	(7.0)	(-28.8)	(30.9)
● Share in Production Total (%):	17.6	18.3	18.6
● Export (Mio. €):	651	446	438
Change over previous year (%)	(-2.7)	(-31.5)	(-1.7)
● Export share (%):	66.6	64.1	48.1



Blow Moulding Machines

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Production (Mio. €):	402	276	373
Change over previous year(%)	(9.1)	(-31.3)	(35.4)
● Share in Production Total (%):	7.3	7.2	7.6
● Export (Mio. €):	179	207	284
Changes over previous year (%)	(-19.7)	(15.1)	(37.6)
● Export share (%):	44.5	74.9	76.2



Thermoforming and Vacuumforming Machines

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Production (Mio. €):	175	119	155
Change over previous year (%)	(-4.7)	(-32.1)	(30.0)
● Share in Production Total (%):	3.2	3.1	3.1
● Export (Mio. €):	160	94	130
Change over previous year (%)	(-3,5)	(-41.2)	(38.8)
● Export share (%):	91.4	79.0	84.4



Presses

	<u>2008</u>	<u>2009</u>	<u>2010</u>
● Production (Mio. €):	142	97	101
Change over previous year (%)	(17.0)	(-31.4)	(3.5)
● Share in Production Total (%):	2.5	2.6	2.0
● Export (Mio. €):	52	57	30
Change over previous year (%)	(16.1)	(9.3)	(-48.2)
● Export share (%):	36.6	58.6	29.4



Situation and Forecast

- **New Orders January – March 2011 / 2010:**

- Total 31 %
 - Domestic Market 37 %
 - Export 29 %
 - Euro-Countries 13 %

- **Forecast**

- 2011: just under 18 % Production value: 5.795 Mio. Euro
- 2012: just under 7 %
- Update every six months

Source: VDMA



Chances & Risks

- Recovery meanwhile reached customers in Western Europe and USA, too
- Companies coming close to capacity limits project investments in expansion
- Financial markets still susceptible to risk
- Short-term fluctuations of EURO-exchange rate as well as uncertainty of long-term currency development
- Rising cost for energy and raw materials directly stress machinery makers and put pressure on their clients



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