

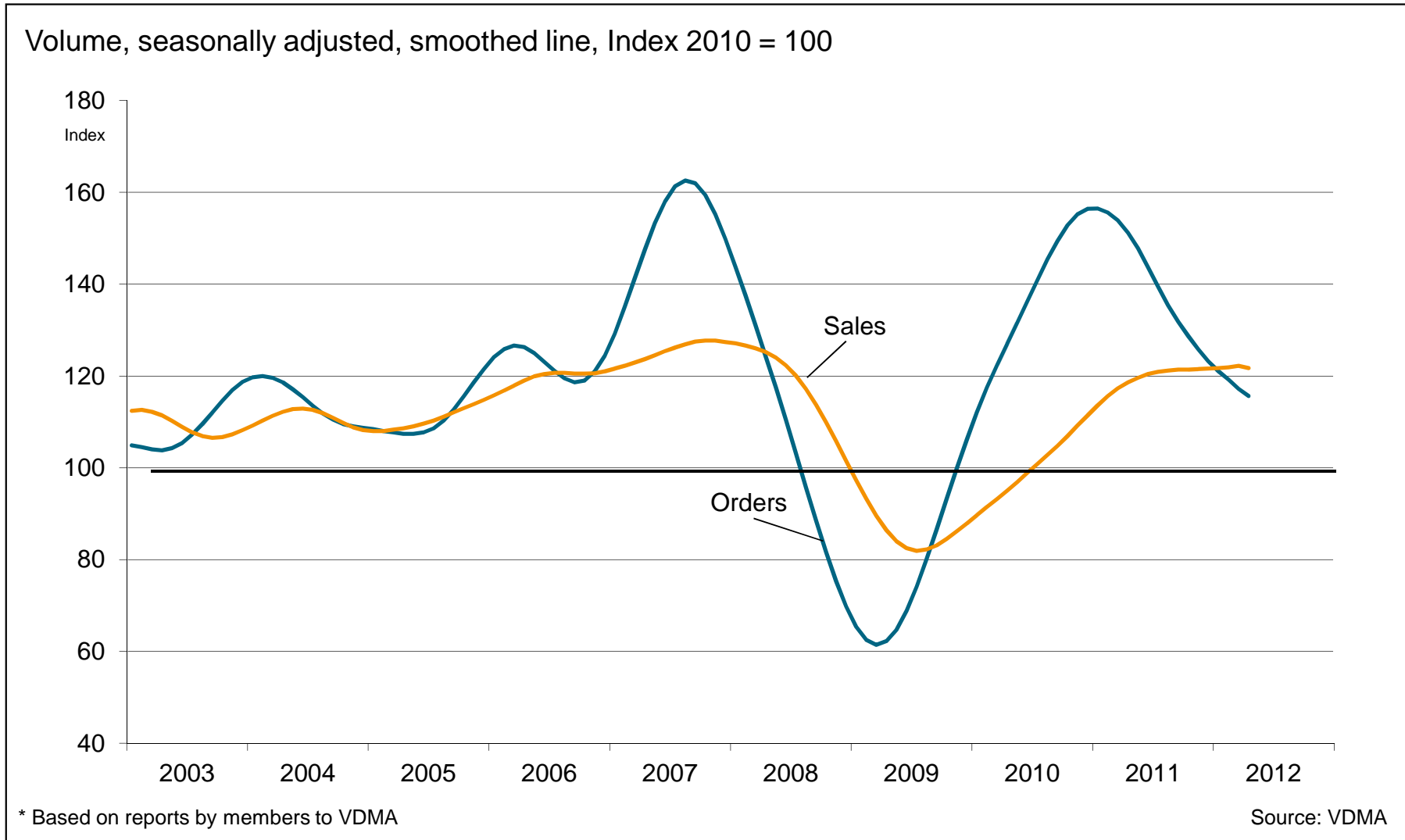


Review
Plastics and Rubber
Machinery
2011





New Orders and Sales





2011 – Review

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● New Orders: (Change in %)	-28	75	3
Domestic Market:	-35	50	5
Export Total:	-24	86	2
Euro-Countries:	-38	48	7
● Orders on Hand (Months):	4.1	6.7	7.2
● Capacity Utilisation (%):	64	88	92
● Production (Mio. €):	3,851	4,916	6,201
Change over previous year (%)	(-30.7)	(27.7)	(26.1)
● Export (Mio. €):	2,637	3,312	4,324
Change over previous year (%)	(-33.9)	(25.6)	(30.5)
● Export Share (%):	68.5	67.4	69.7

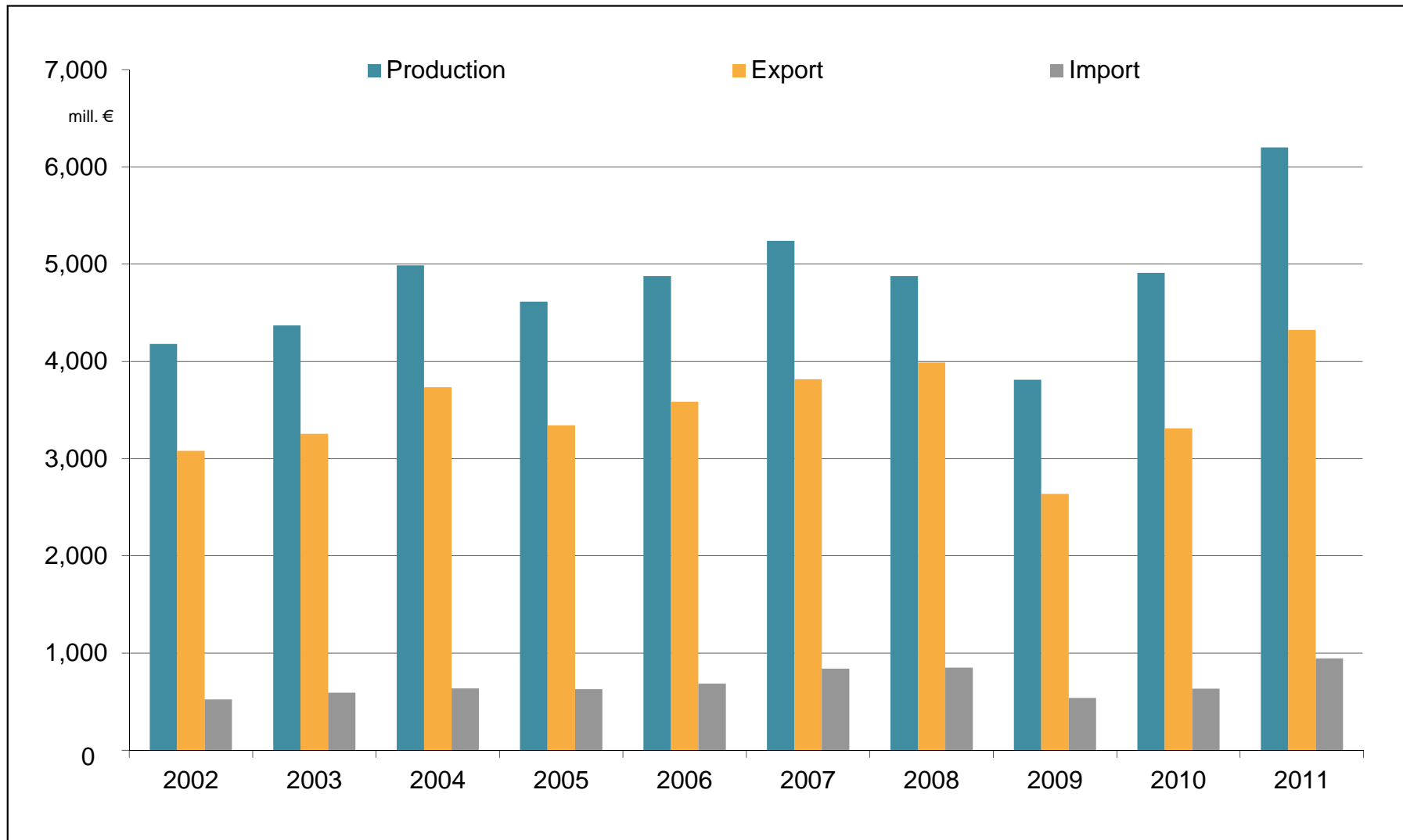


2011 - Review

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Import (Mio. €):	539	633	946
Change over previous year (%)	(-36.7)	(17.5)	(49.5)
● Trade Balance (Mio. €):	1,753	2,238	2,824
Change over previous year (%)	(-27.6)	(27.6)	(26.2)
● Domestic Market (Mio. €):	2,098	2,679	3,377
Change over previous year (%)	(-33.2)	(27.7)	(26.1)
● Share of Import in Domestic Market (%) :	30.7	28.3	33.5
● Work Force	25,209	25,713	27,000



Production - Export - Import





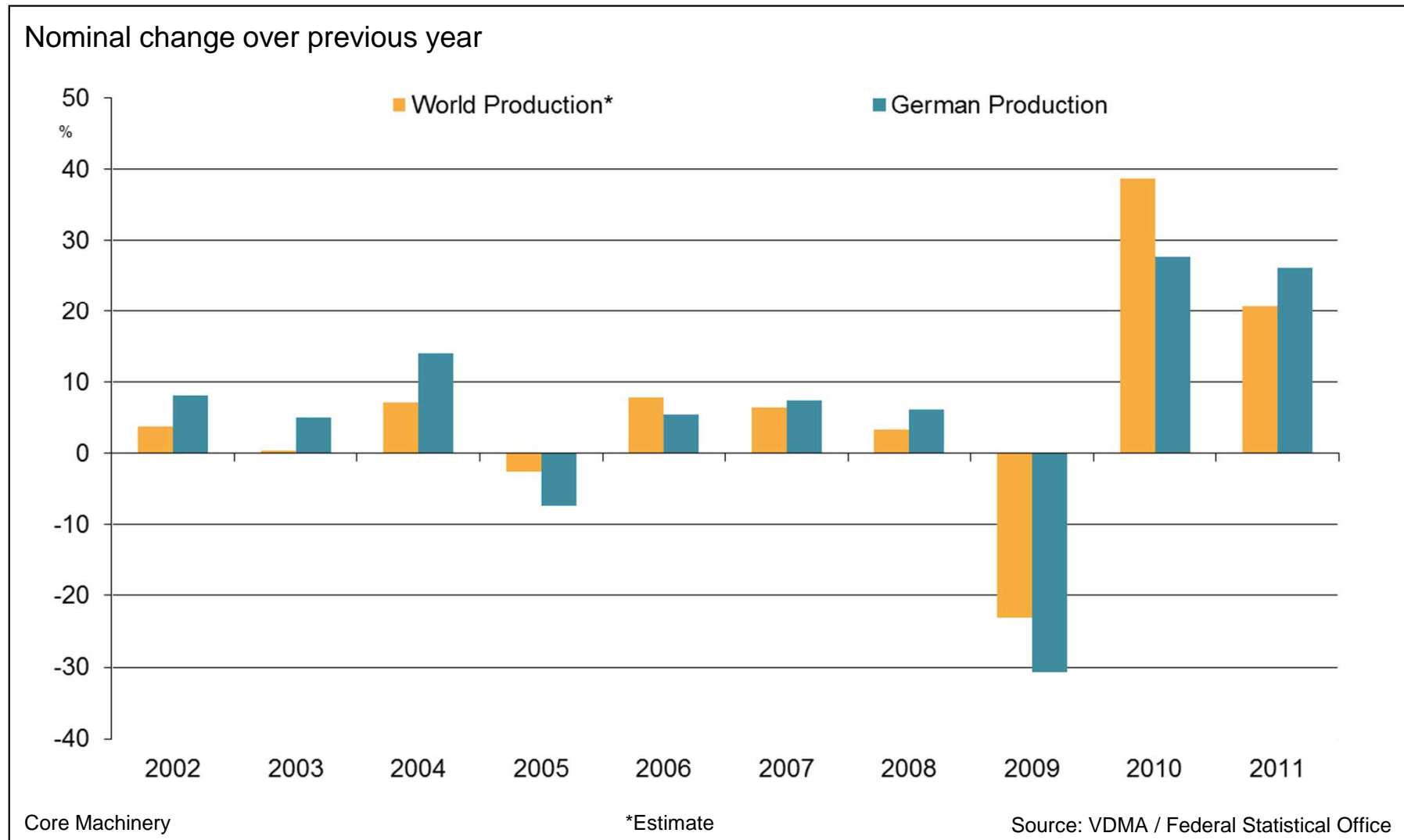
2011 - Review

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Core Machinery (Mio. €):	3,851	4,916	6,201
Change over previous year (%)	(-30.7)	(27.7)	(26.1)
● Moulds and Dies (Mio. €):	1,812	1,714	1,966
Change over previous year (%)	(-11.9)	(-5.4)	(14.7)
● Resin and Parts Handling (Mio. €):	540	635	725
Change over previous year (%)	(-28.9)	(17.6)	(14.2)
● Flexographic printing machines for films (Mio. €):	139	178	198
Change over previous year (%)	(1.0)	(28.3)	(10.9)
● Total (Mio. €):	6,342	7,444	9,090
Change over previous year (%)	(-25.3)	(17.4)	(22.1)

Source: VDMA



German and World Production





TOP 5 in World Production

Year	World Production* (Mio. €)	Shares of particular countries (%)				
		China	Germany	Italy	USA	Japan
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	23,371	29.3	21.0	9.6	5.4	5.4
2011	28,215	30,5	22,0	8,8	6,5	5,5

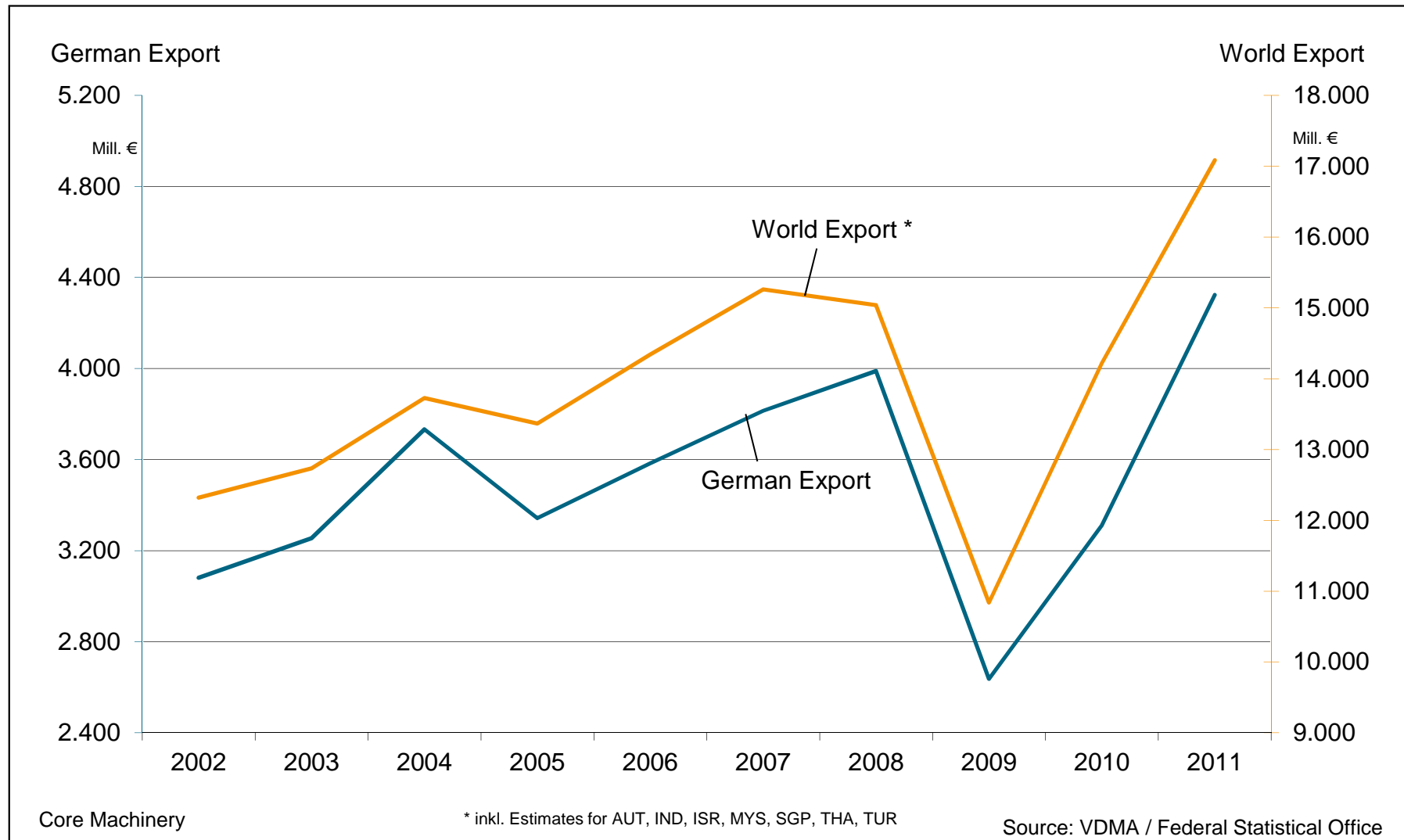
Core Machinery

*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
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	10,838	24.3	10.7	9.0	11.1	7.4
2010	14,223	23.3	12.6	10.4	9.5	6.6
2011	17,083 *	25.3	11.9	10.8	9.8	6.1

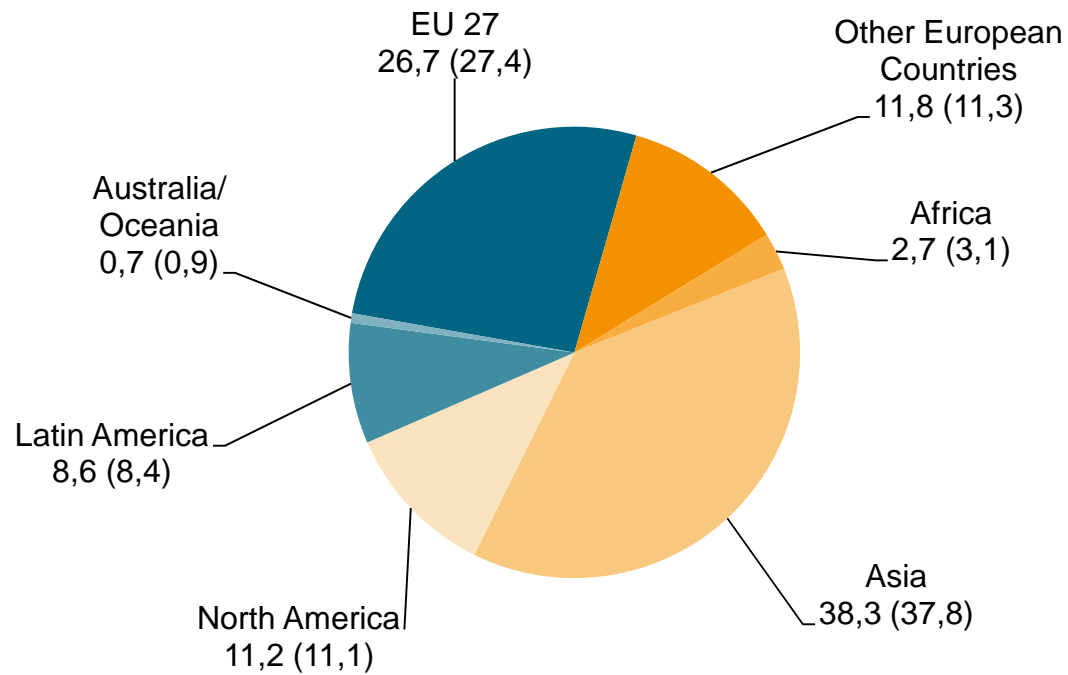
Core Machinery

* inkl. Estimates for AUT, IND, ISR, MYS, SGP, THA, TUR

Source: VDMA / Federal Statistical Office

Export to Regions 2011 (2010)

Percentage shares





Export to European Markets

	<u>2009</u>	<u>2010</u>	<u>2011</u>
EU-27-Countries			
● Shares (%):	29.6	27.4	26.7
● Value (Mio. €):	781	909	1,153
Change over previous year (%)	(-44.0)	(16.3)	(26.9)
Other European Countries			
● Shares (%):	12.2	11.3	11.8
● Value (Mio. €):	321	374	511
Change over previous year (%)	(-41.5)	(16.6)	(36.7)



Export to the Americas

	<u>2009</u>	<u>2010</u>	<u>2011</u>
North America			
● Shares (%):	10.7	11.1	11.2
● Value (Mio. €):	283	369	483
Change over previous year (%)	(-38.7)	(30.3)	(30.7)
Thereof:			
● USA (Mio. €):			
Change over previous year (%)	258	338	454
	(-41.7)	(31.2)	(34.2)
Central- and South America			
● Shares (%):	7.2	8.4	8.6
● Value (Mio. €):	190	277	373
Change over previous year (%)	(-32.9)	(46.0)	(34.8)

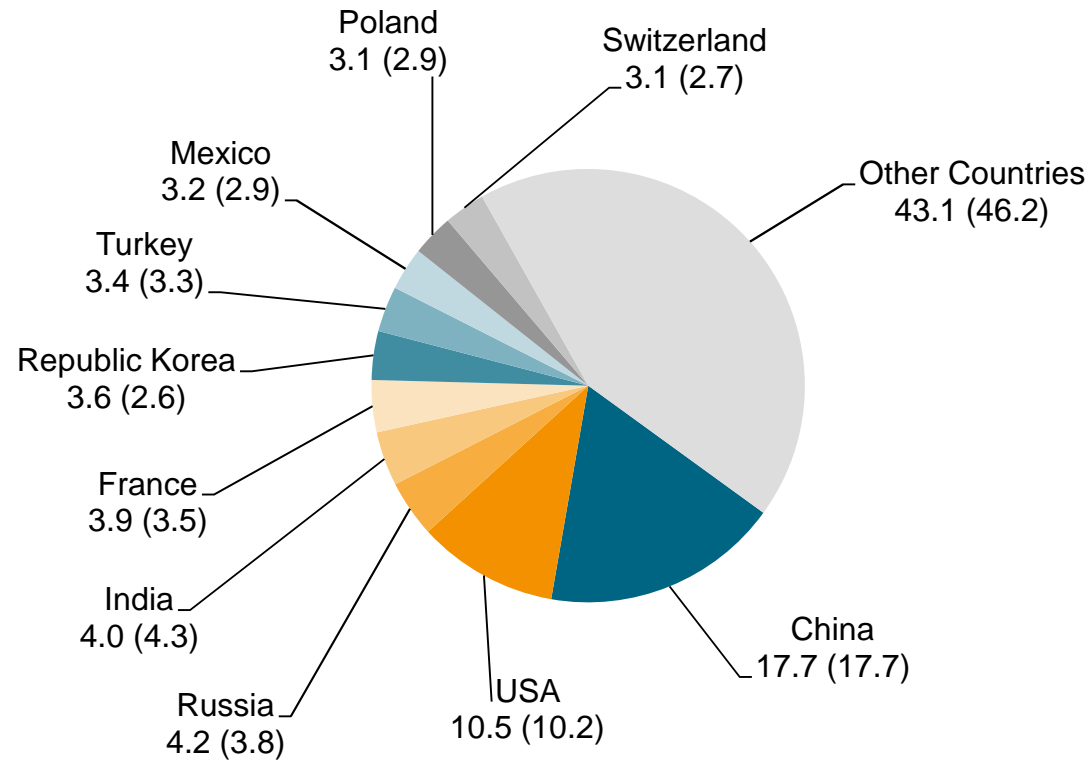


Export to Asia

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Shares (%) :	36.5	37.8	38.3
● Value (Mio. €) :	963	1,253	1,658
Change over previous year (%)	(-17.2)	(30.1)	(32.4)
Thereof:			
Saudi-Arabia (Mio. €) :	65	62	55
Change over previous year (%)	(-23.8)	(-4.6)	(-11.4)
India (Mio. €) :	131	141	175
Change over previous year (%)	(29.8)	(7.5)	(24.1)
ASEAN (Mio. €) :	160	166	204
Change over previous year (%)	(-3.6)	(3.6)	(23.0)
China (Mio. €) :	357	587	766
Change over previous year (%)	(-27.8)	(64.4)	(30.5)

Exports to Major Destinations 2011 (2010)

Percentage shares





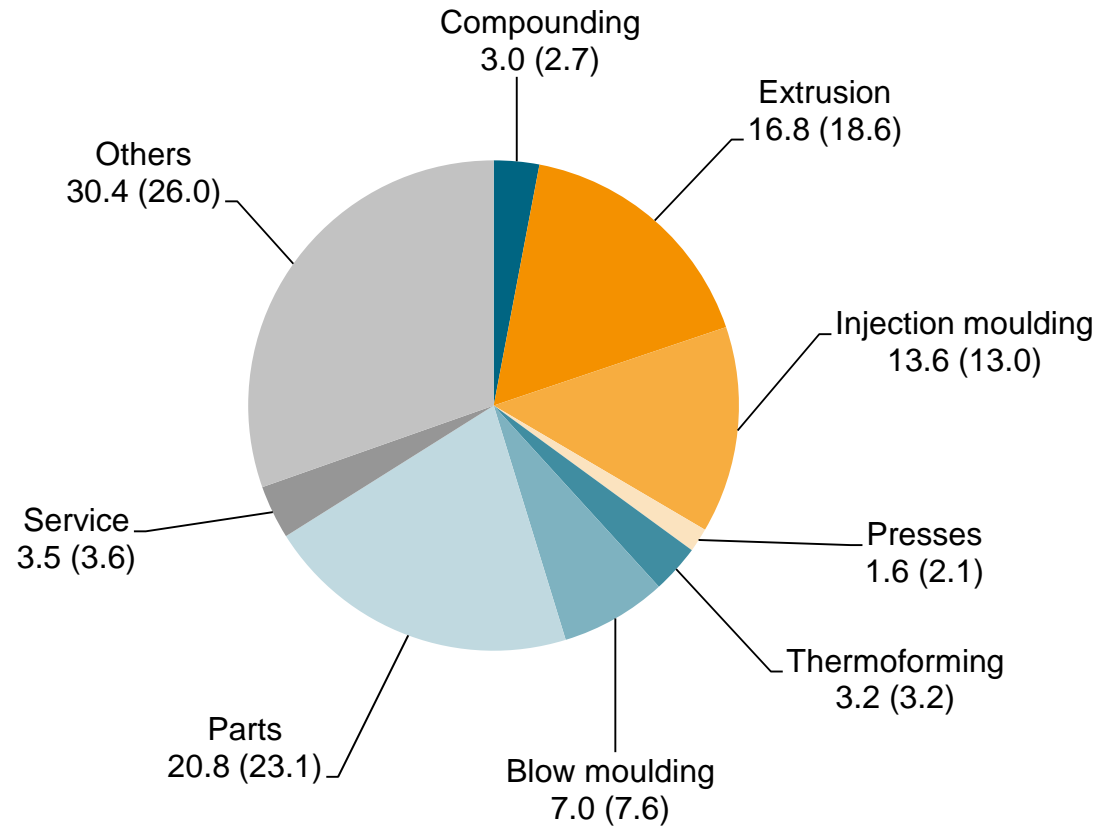
TOP-10- Destinations 2011 (2010)

	2011 (Mio. €)	2011 / 2010 (%)	Shares of Export (%)	Position	
				2011	2010
Total Export	4,324	30.5	100.0		
China	766	30.5	17.7	1	1
USA	454	34.2	10.5	2	2
Russia	184	47.8	4.2	3	4
India	175	24.1	4.0	4	3
France	169	46.3	3.9	5	5
Republic Korea	157	82.4	3.6	6	13
Turkey	148	35.1	3.4	7	7
Mexico	138	45.1	3.2	8	10
Poland	135	41.7	3.1	9	9
Switzerland	133	48.0	3.1	10	11

Production 2011 (2010)

Shares of Machinery Types

Percentage shares



Core Machinery

Source: VDMA



Injection Moulding Machines

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Production (Mio. €):	397	638	846
Change over previous year (%)	(-53.2)	(60.5)	(32.5)
● Share in Production Total (%) :	10.3	13.0	13.6
● Export (Mio. €):	382	593	739
Change over previous year (%)	(-43.3)	(55.2)	(24.5)
● Export share (%) :	96.2	93.0	87.4



Extruders and Extrusion Lines

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Production (Mio. €):	708	912	1.043
Change over previous year (%)	(-27.7)	(28.8)	(14.4)
● Share in Production Total (%):	18.4	18.6	16.8
● Export (Mio. €):	446	438	658
Change over previous year (%)	(-31.6)	(-1.7)	(50.1)
● Export share (%):	63.0	48.1	63.1



Blow Moulding Machines

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Production (Mio. €):	276	374	435
Change over previous year(%)	(-31.3)	(35.6)	(16.3)
● Share in Production Total (%) :	7.2	7.6	7.0
● Export (Mio. €):	207	284	322
Changes over previous year (%)	(15.7)	(37.6)	(13.4)
● Export share (%) :	74.9	76.0	74.1



Vacuumforming and Other Thermoforming Machines

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Production (Mio. €):	120	158	198
Change over previous year (%)	(-31.8)	(32.4)	(24.9)
● Share in Production Total (%):	3.2	3.2	3.2
● Export (Mio. €):	94	130	154
Change over previous year (%)	(-41.3)	(38.8)	(17.7)
● Export share (%):	78.6	82.5	77.8



Presses

	<u>2009</u>	<u>2010</u>	<u>2011</u>
● Production (Mio. €):	97	103	98
Change over previous year (%)	(-31.4)	(5.6)	(-4.4)
● Share in Production Total (%):	2.5	2.1	1.6
● Export (Mio. €):	57	30	49
Change over previous year (%)	(9.3)	(-48.2)	(66.1)
● Export share (%):	58.8	28.8	50.0



Situation and Forecast

- **New Orders January – March 2012 / 2011:**

- Total - 6 %
 - Domestic Market - 8 %
 - Export - 5 %
 - Euro-Countries -12 %

- **Forecast**

- 2012: -2 % Production value: 6,077 Mio. Euro
- 2013 7 %
- Update every six months

Source: VDMA



Chances

- Private consumption strengthened by favourable development on labour market and by wage increases
- Affinity to invest is given on the domestic market, supported by optimism among entrepreneurs as well as by low interest rates
- Capacities have reached limits and necessitate expansion investments



Risks

- National debts crisis in EURO countries and the USA unsolved; nervousness on financial markets prevails
- Strong increase of oil and energy prices



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