

Welcome to the VDW Annual Press Conference 2024

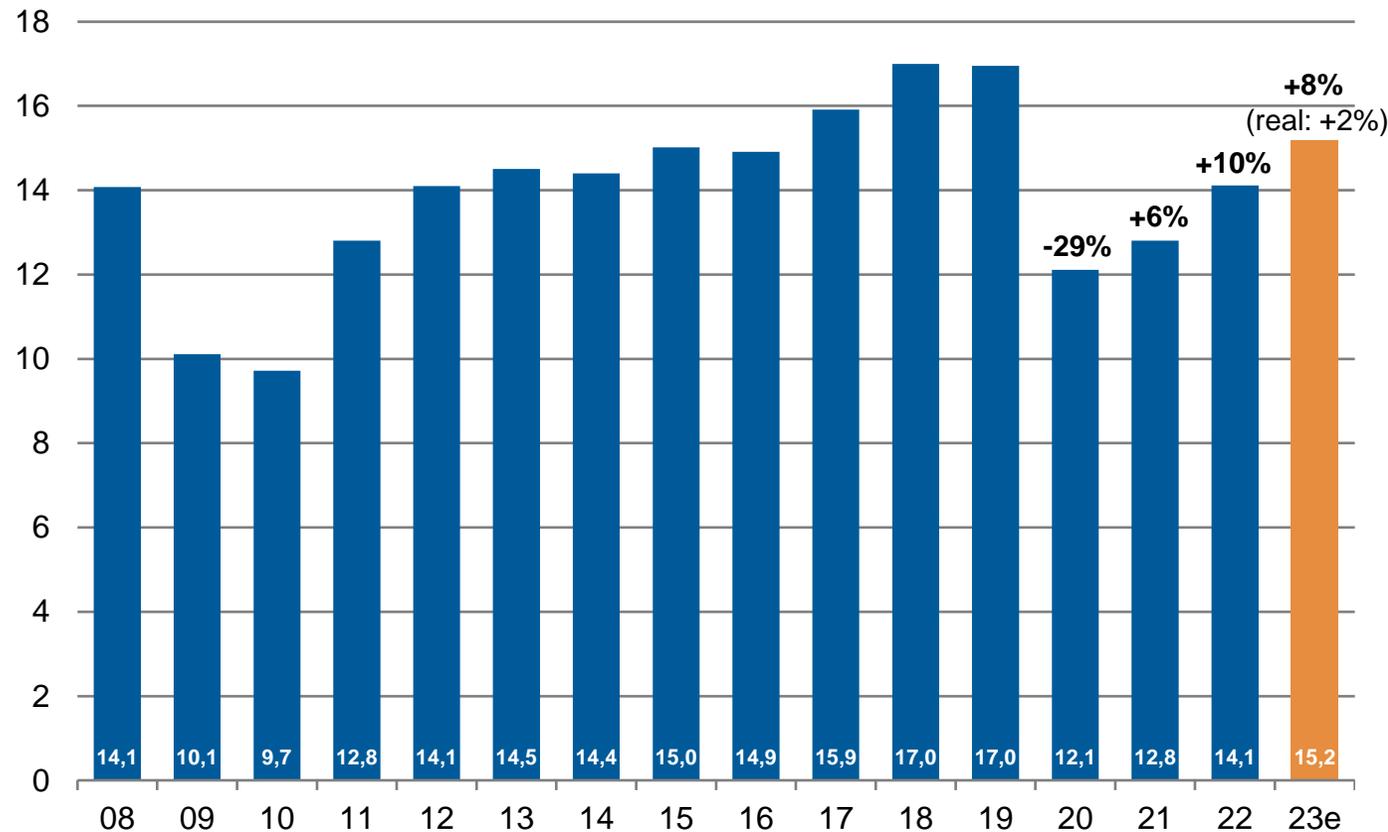
Frankfurt am Main, 22th January 2024

Machine tool production Germany

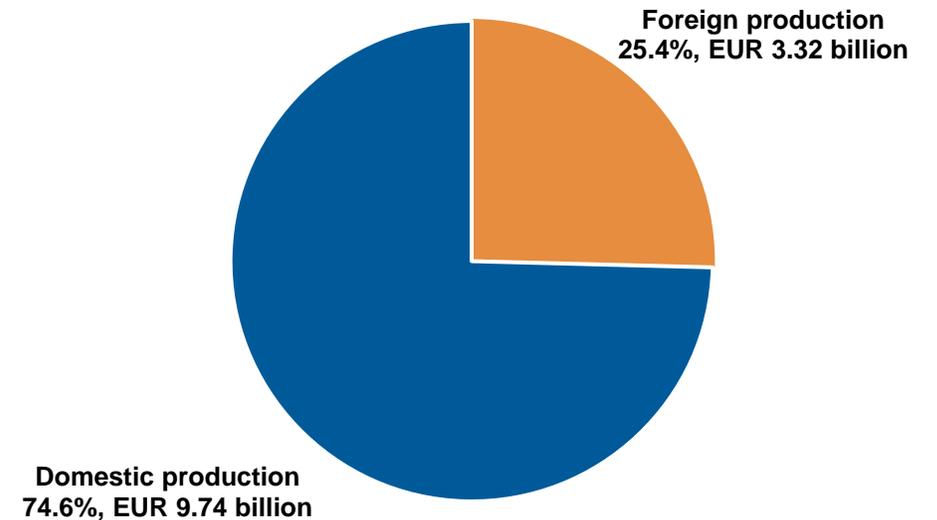
Production increasing by eight percent in nominal terms in 2023



EUR billion, domestic production*



Foreign share of machine production in 2022:
(excluding parts/accessories, installation, repair and maintenance)



*Machine tools incl. parts/accessories, installation, repair and maintenance

Note: 2023 estimate based on preliminary data; January 2024
Sources: Federal Statistical Office, VDW

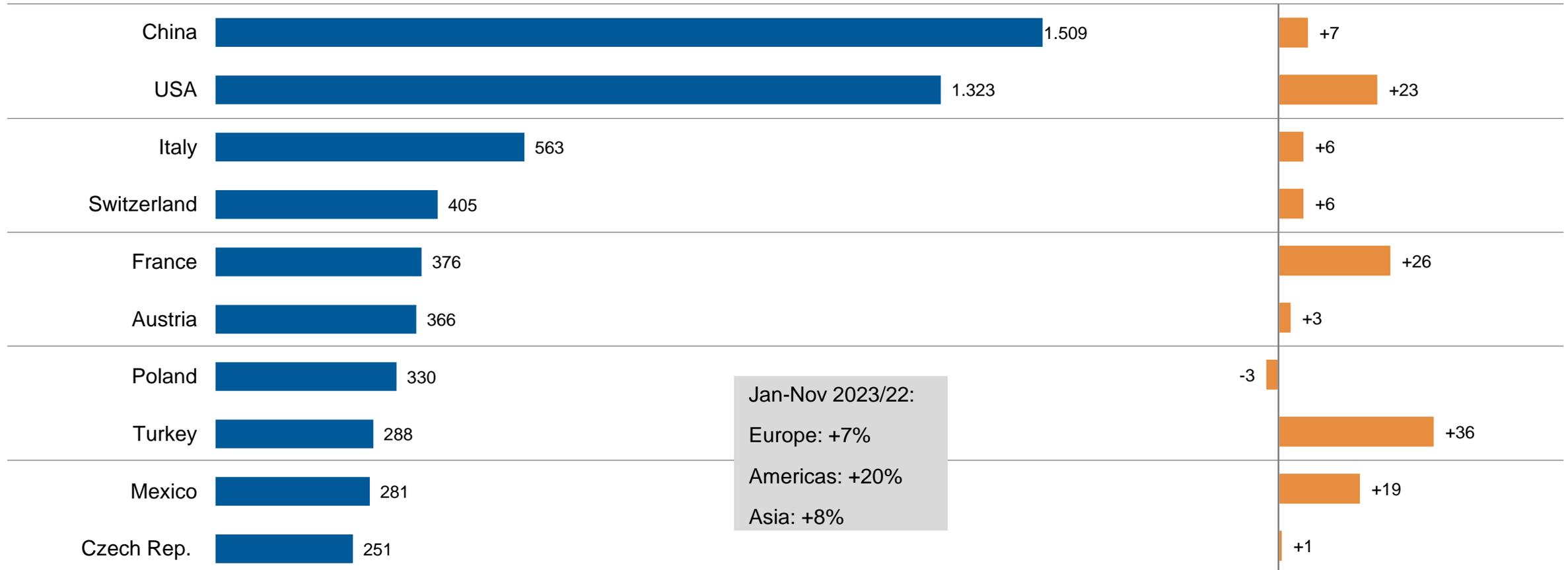
Machine Tool Export Germany

North America with high growth rates



Top-10 Trading Partners, Jan-Nov 2023, EUR million

Rate of change 2023/22



Total exports until Nov. 2023: EUR 8.5 billion, Rate of change 23/22: +9.7%

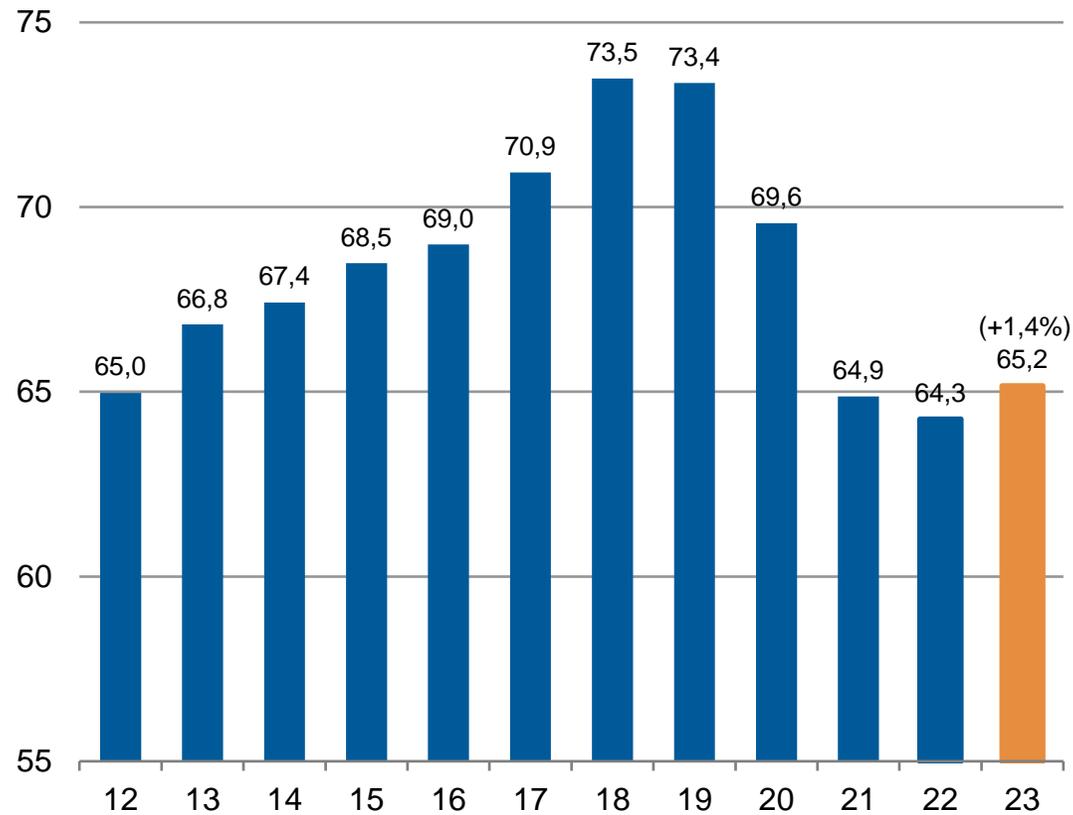
Note: Machine tools incl. parts/accessories; Sources: Federal Statistical Office, VDMA, VDW

Machine tool industry Germany – Employees

Companies building up staff again

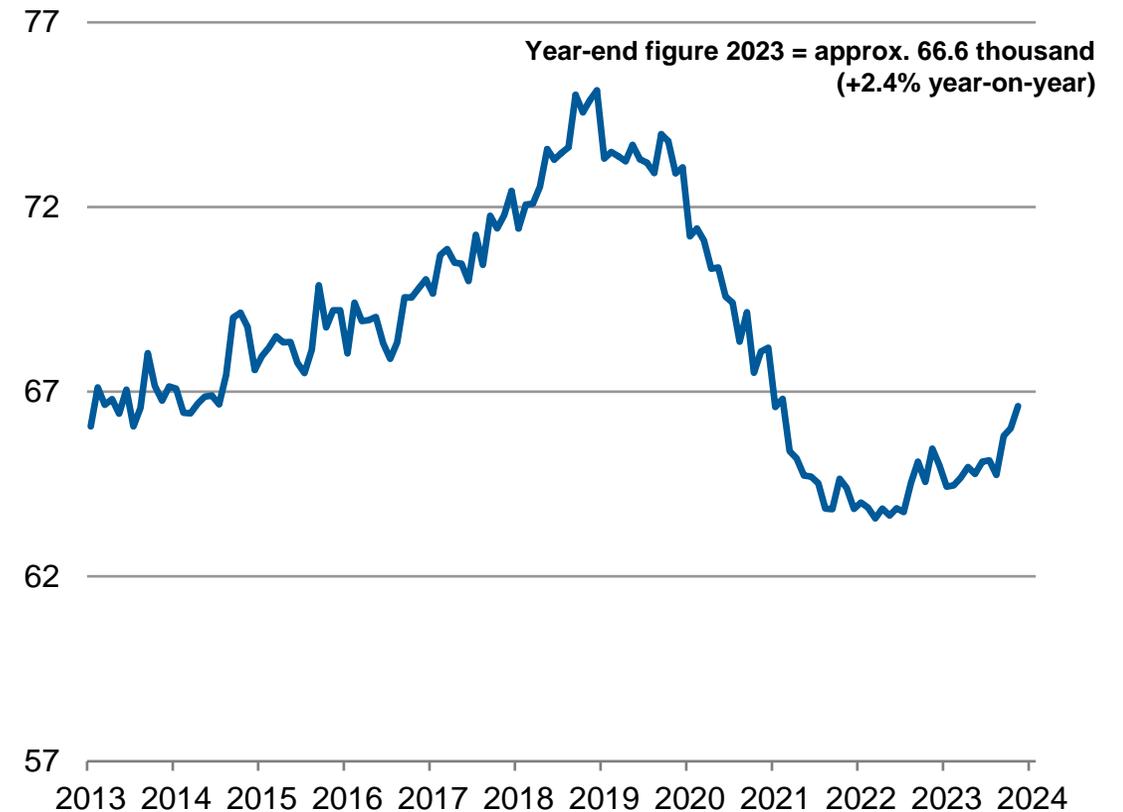


Annual averages (in thousands)



Additional at foreign locations: approx. 12,000 employees (2022)

Monthly development (in thousands)



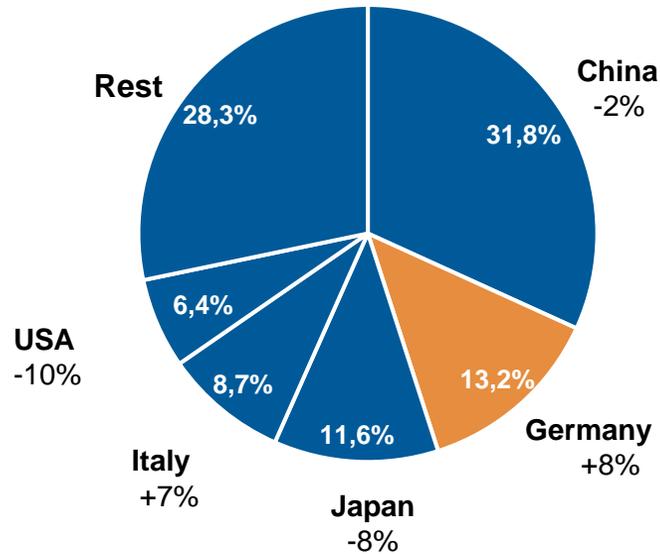
Note: Companies with 50 or more employees; December 2023 estimated.
Sources: Federal Statistical Office, VDMA, VDW

World Data Machine Tools

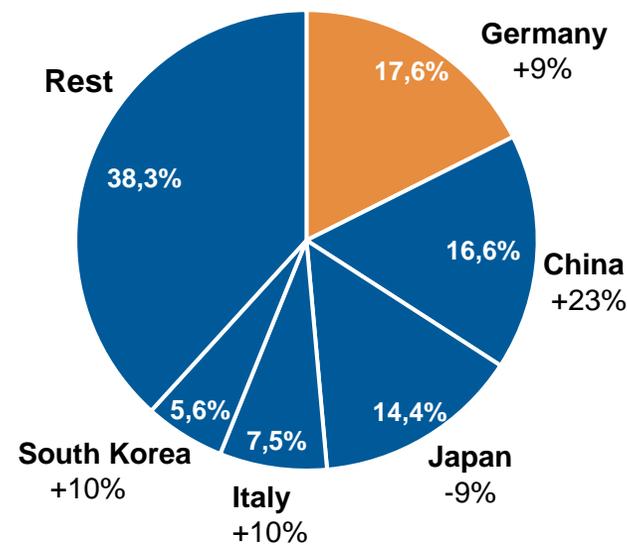
Germany remains the world's leading exporter



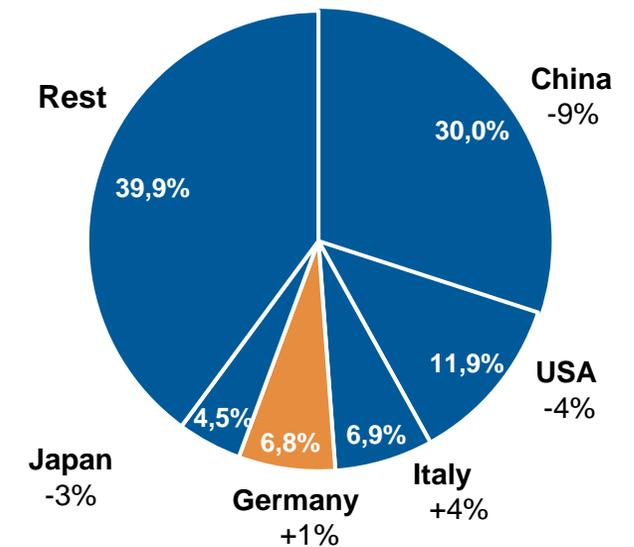
World Production* 2023
EUR 79.3 billion
Rate of change 23/22: -2%



World Export 2023
EUR 44.4 billion
Rate of change 23/22: +5%



World Consumption 2023
EUR 78.5 billion
Rate of change 23/22: -3%



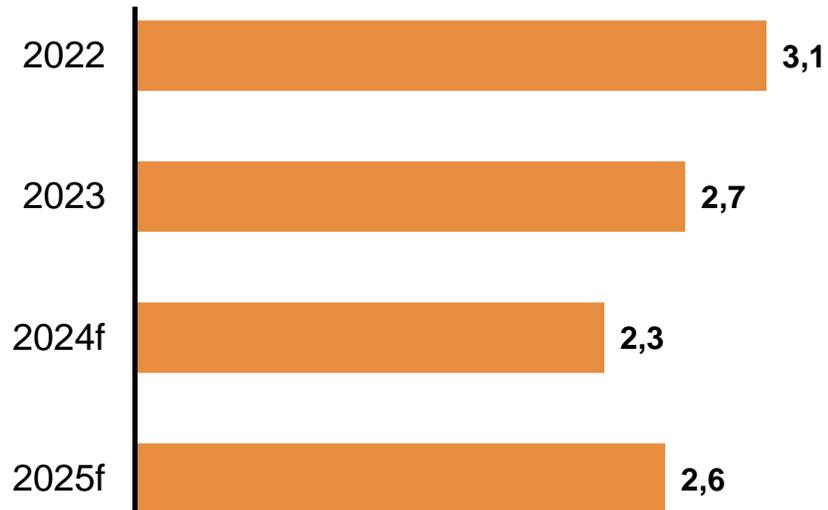
*Estimation based on preliminary data; Sources: VDW, VDMA, national associations

Macroeconomic conditions

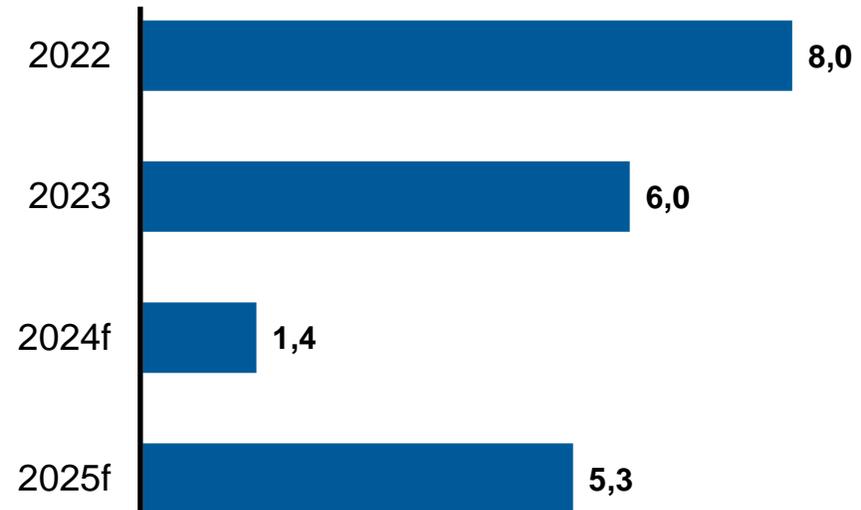
Global economic growth to weaken again in 2024



World, Gross Domestic Product, rate of change in %



World, Investments, rate of change in %



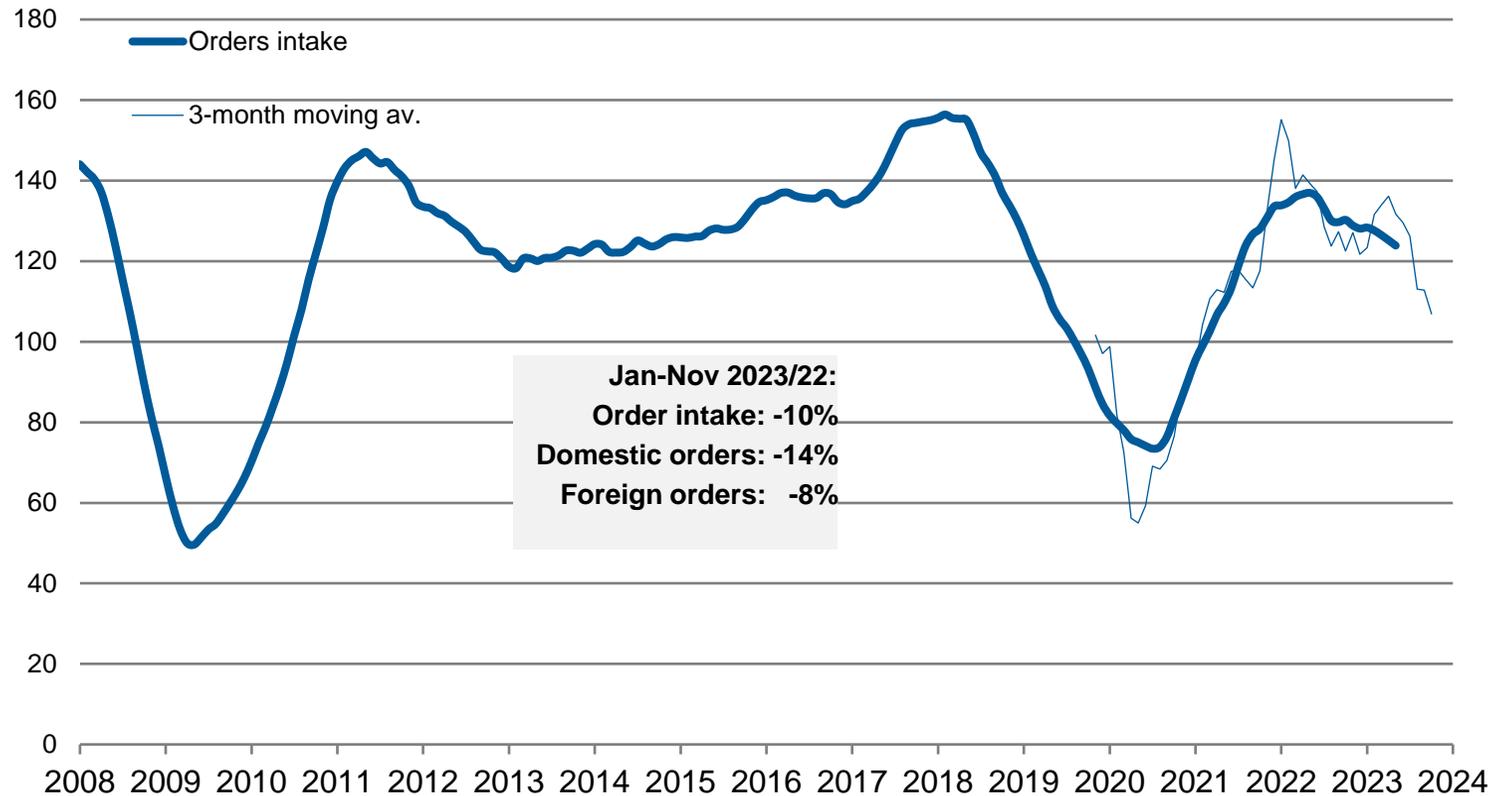
Source: Oxford Economics, January 2024

Machine tool industry Germany – order intake

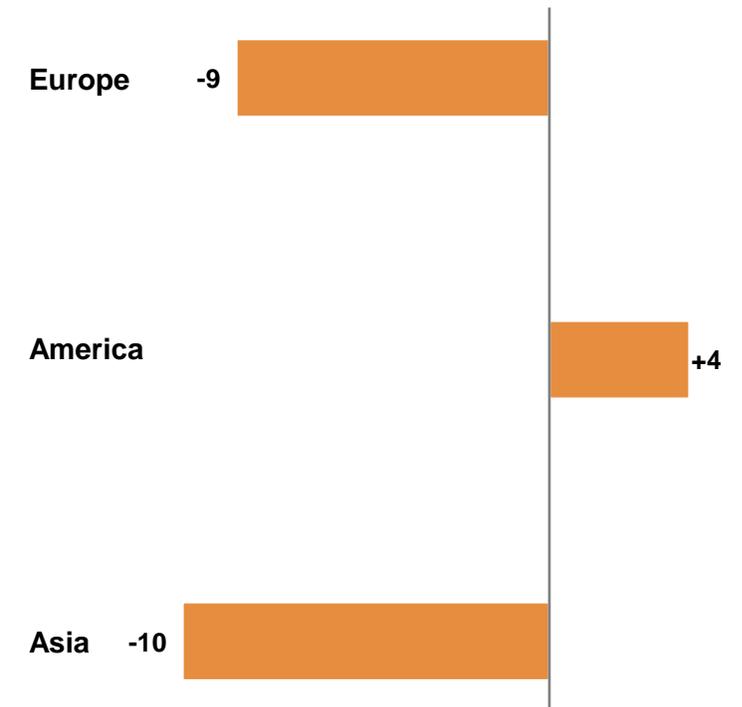
America cushioning the decline in orders



Index, nominal, 12-month moving average



Incoming foreign orders by region, 1-3Q 2023/2022:



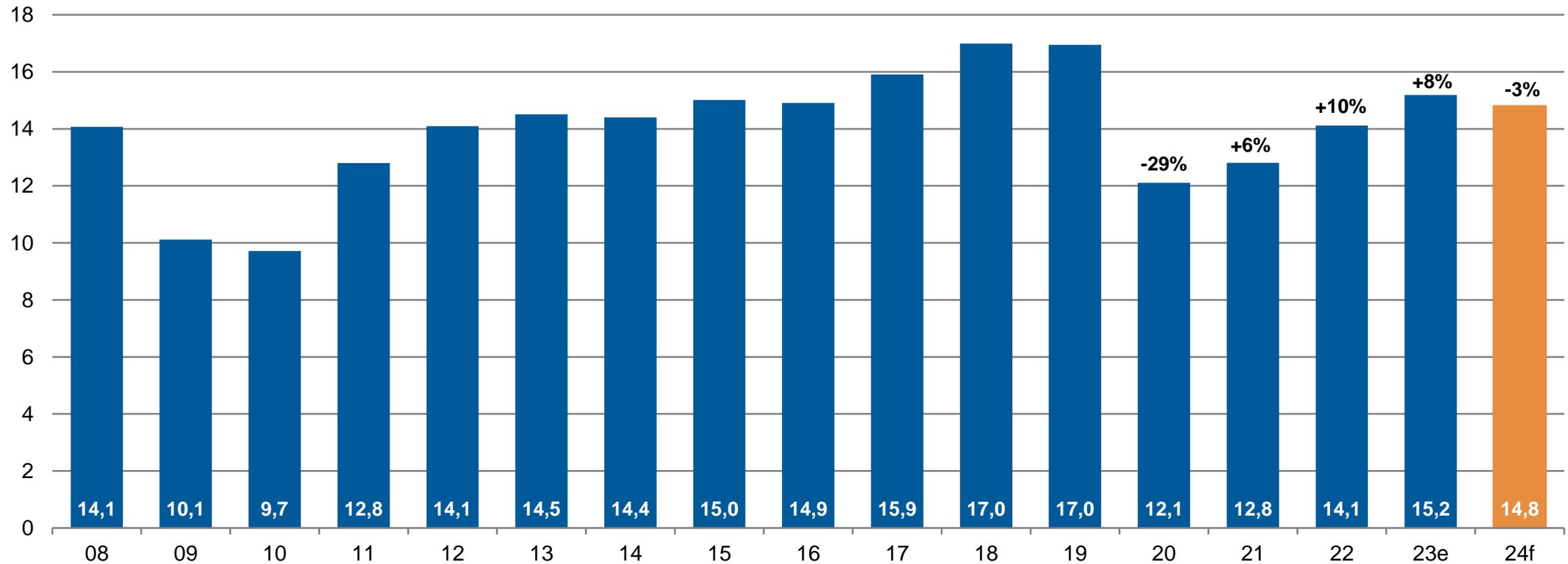
Note: Index basis sales 2021=100, data up to November 2023, sources: Monthly order intake statistics VDMA, VDW

Machine tool production Germany

Decline in production expected in 2024



EUR billion



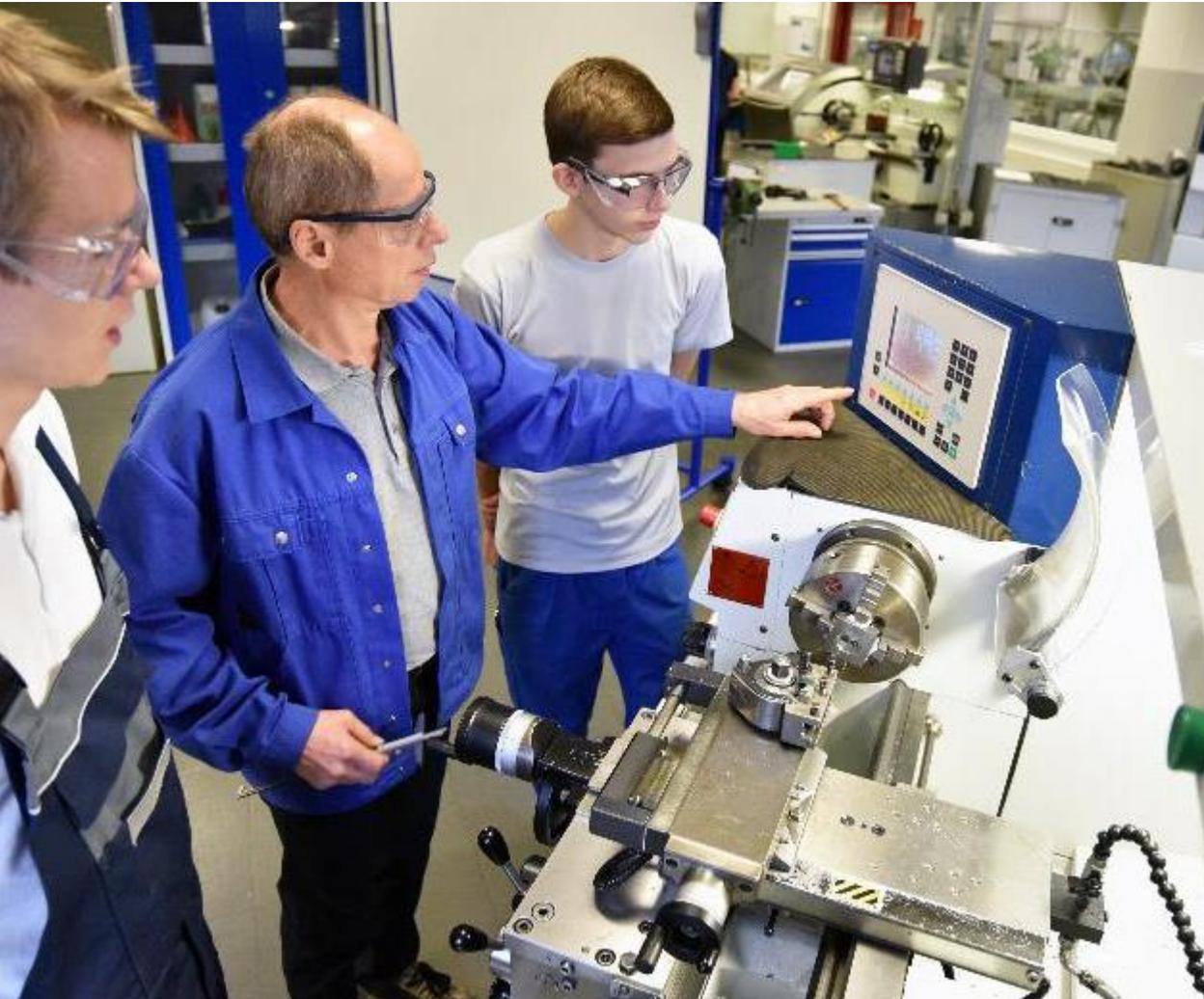
Note: 2023 estimate based on preliminary data; 2024 Forecast according to Oxford Economics, January 2024
Sources: Federal Statistical Office, VDW

Small and medium-sized businesses are suffocating in bureaucracy!



- Supply Chain Due Diligence Act
- Corporate Sustainability Reporting (CSR)
➔ **too expensive, missing the mark, ineffective!**
- Export licenses for dual-use products
➔ **Acceleration of the procedure demanded!**

Mechanical engineering assists young people in need of support



Target group:

Pupils in the transition system from school/work
(240.000 young people in 2022)

Goal:

Coaching and placement in regular apprenticeships

Herzlichen Dank für Ihre Aufmerksamkeit!

Ihre Fragen bitte!

Frankfurt am Main, 22.01.2024