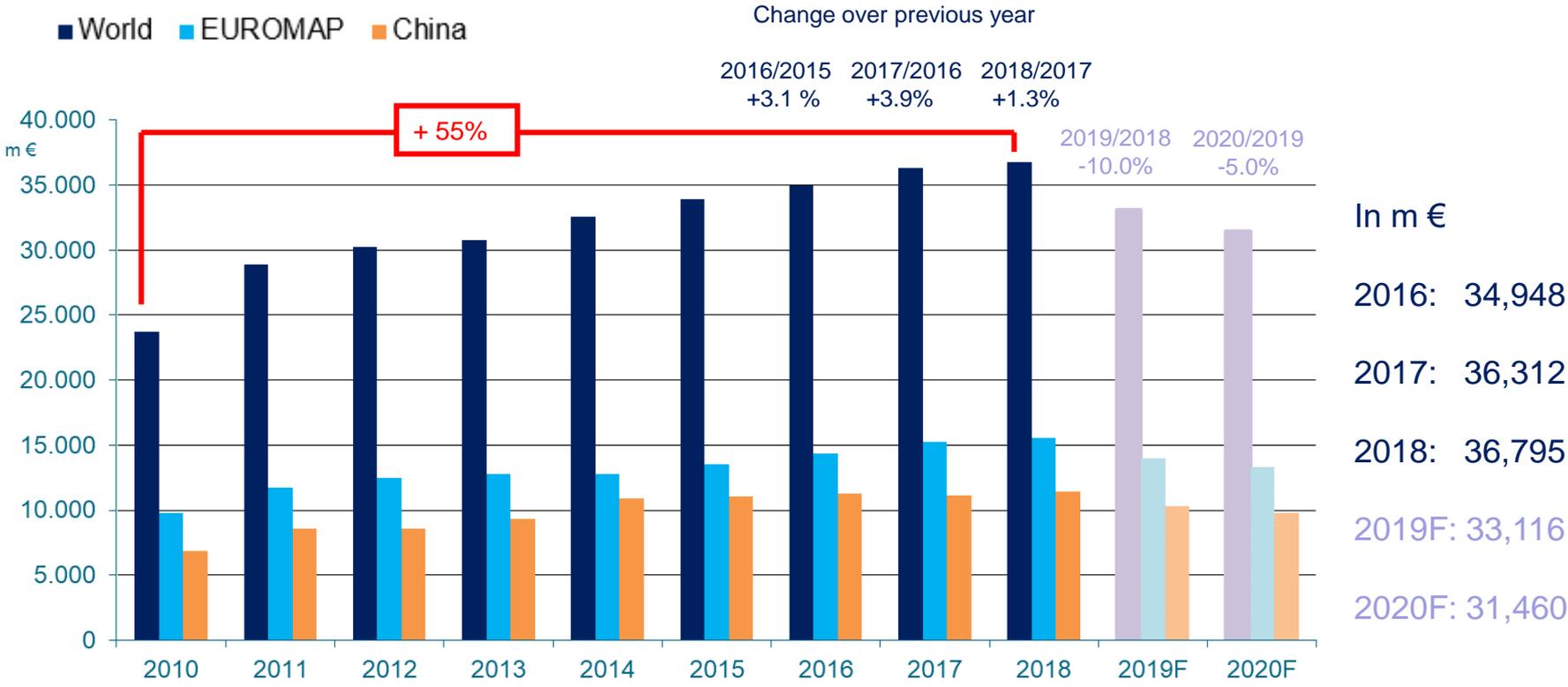


Press Conference 2019

Düsseldorf | 15 October 2019



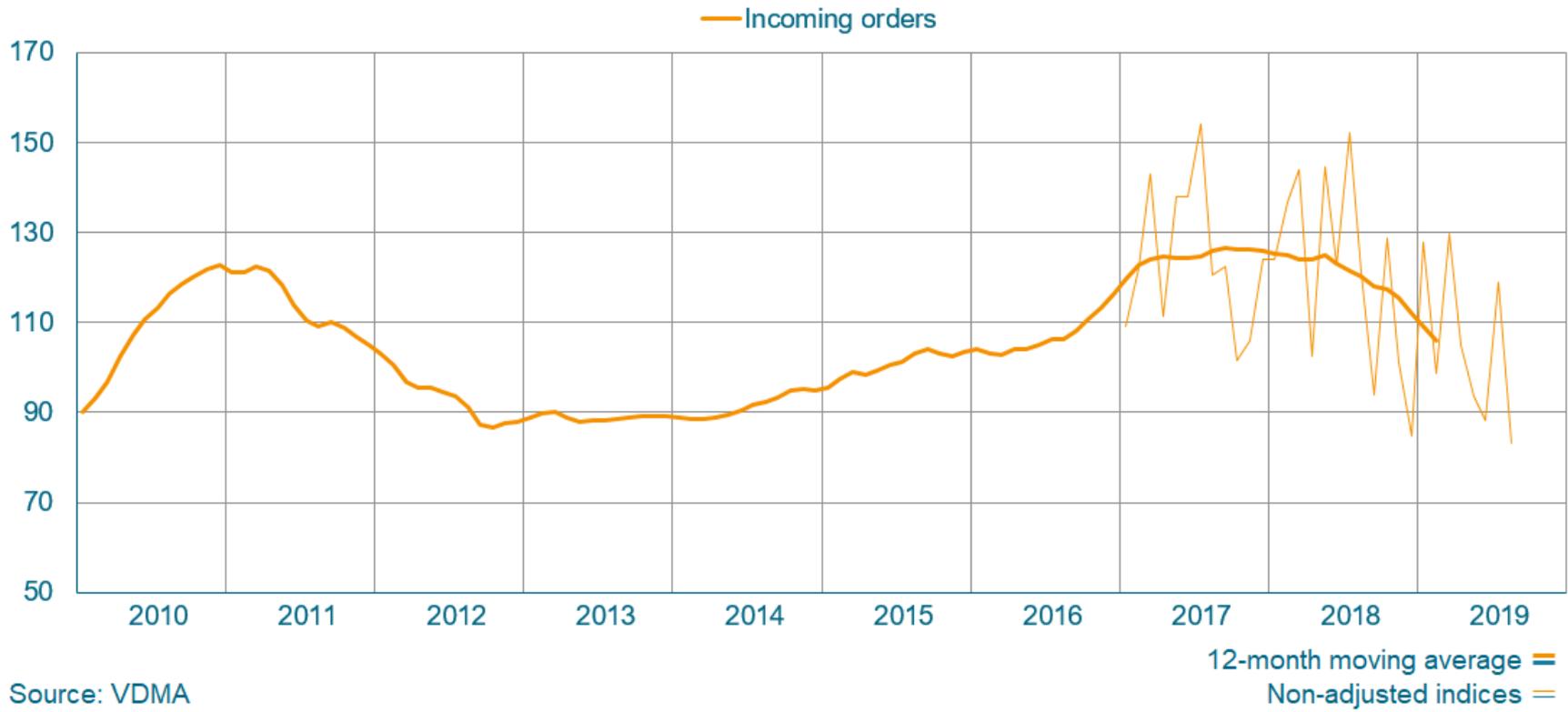
Global Perspective Production*



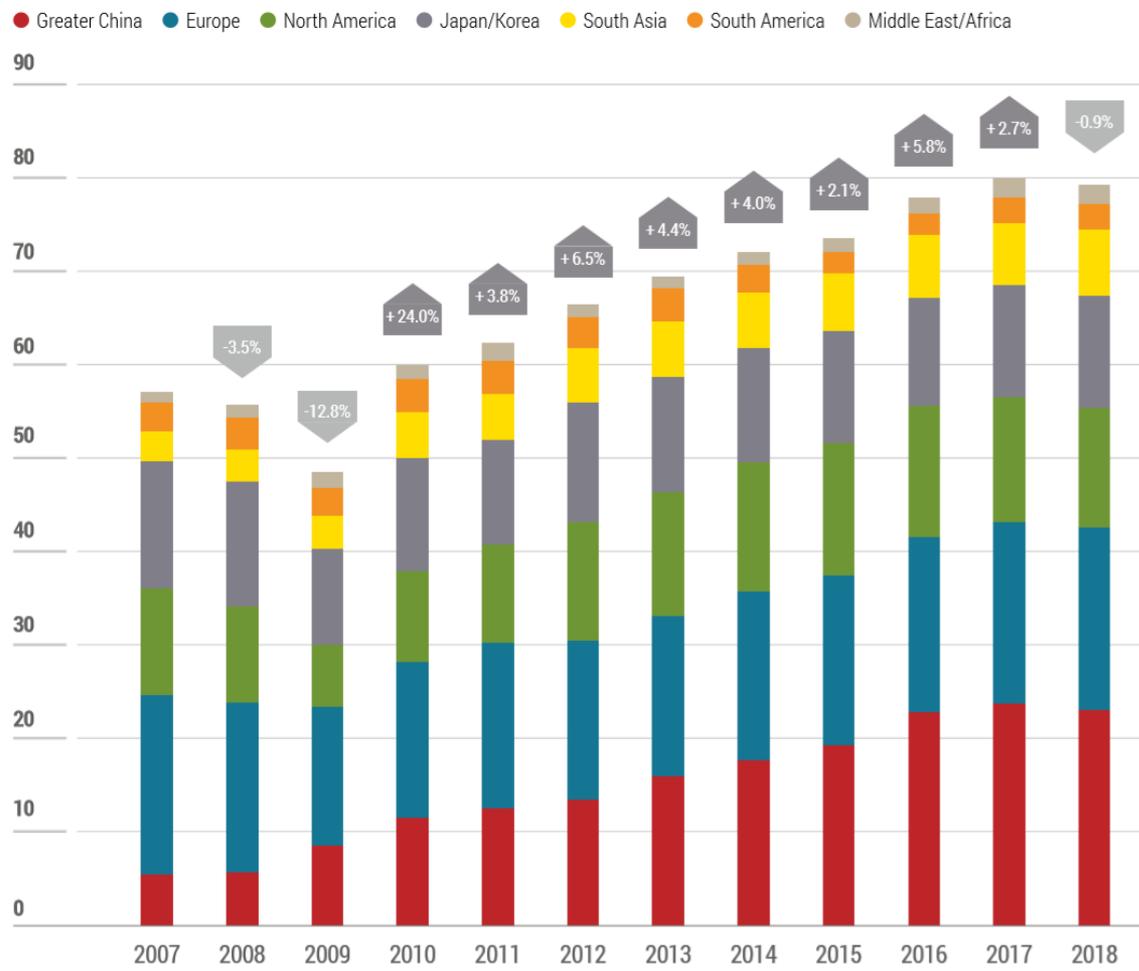
* Estimates F = Forecast

Incoming Orders German Plastics and Rubber Machinery

Volume index 2015 = 100



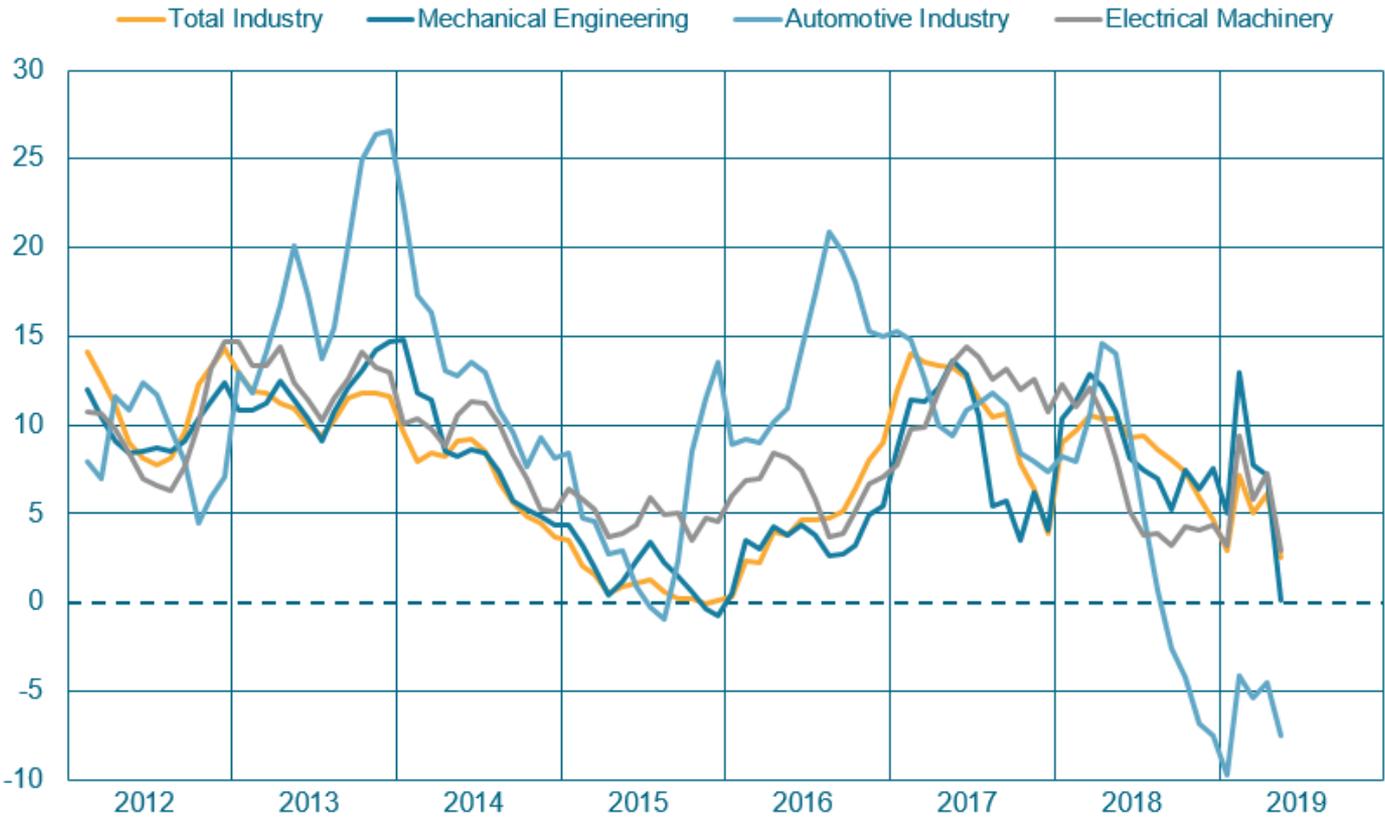
World Passenger Car Production Million Units



Source:
European
Automobile
Manufacturers
Association,
IHS MARKIT,
OICA

Revenue in China by sectors

% year-over-year change, 3mcmma*



European Export of Plastics and Rubber Machinery to China

1st half 2019 year-over-year change:

- 10%

Source: NBS, VDMA

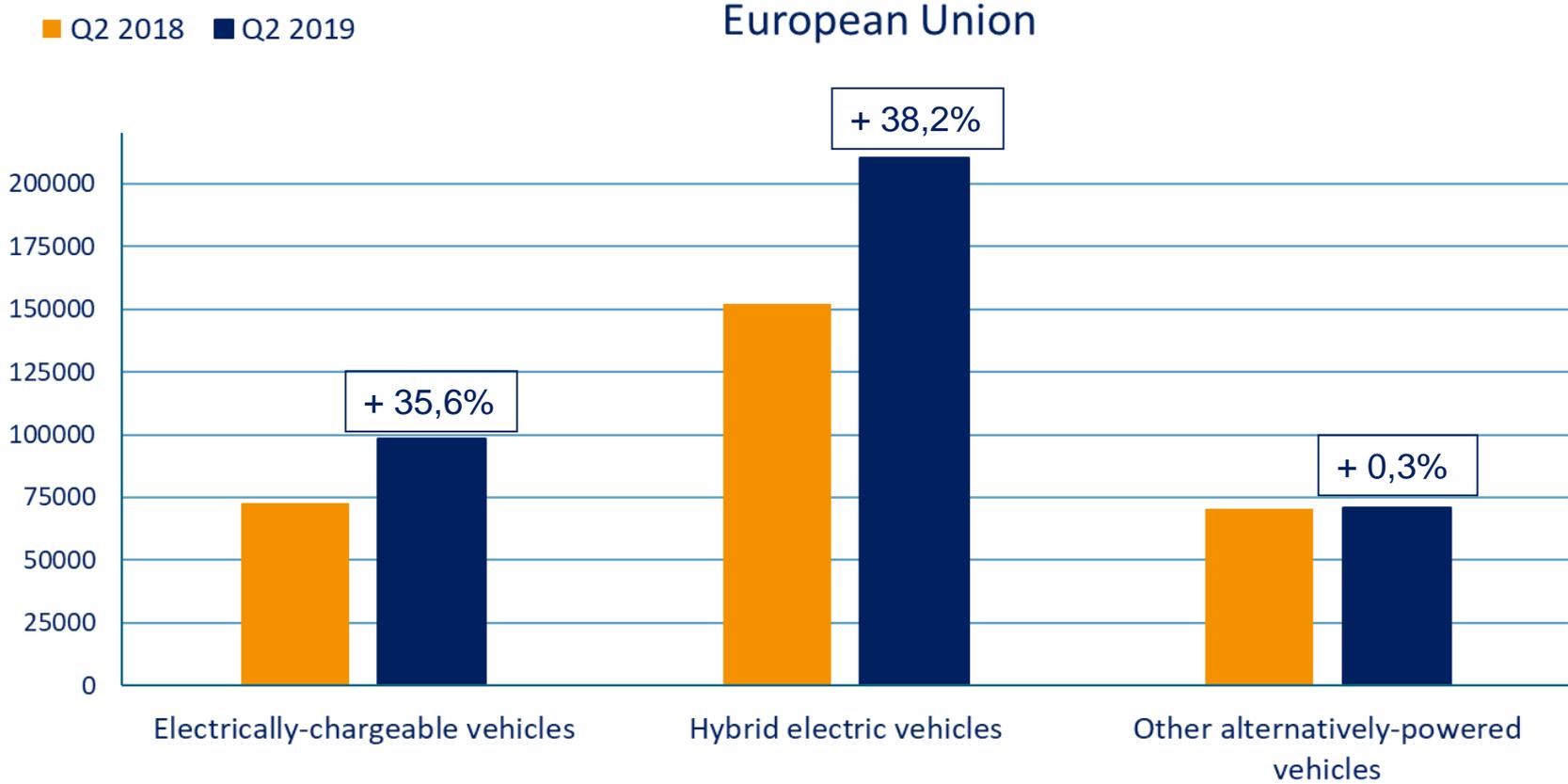
*3mcmma = 3-month centered moving average

Passenger Car Production in the EU Units



Source: European Automobile Manufacturers Association, IHS MARKIT, OICA

Game changer – alternative drives - passenger car registrations in the EU



Source: European Automobile Manufacturers Association

Bilateral machinery trade between USA and China

% year-on-year change



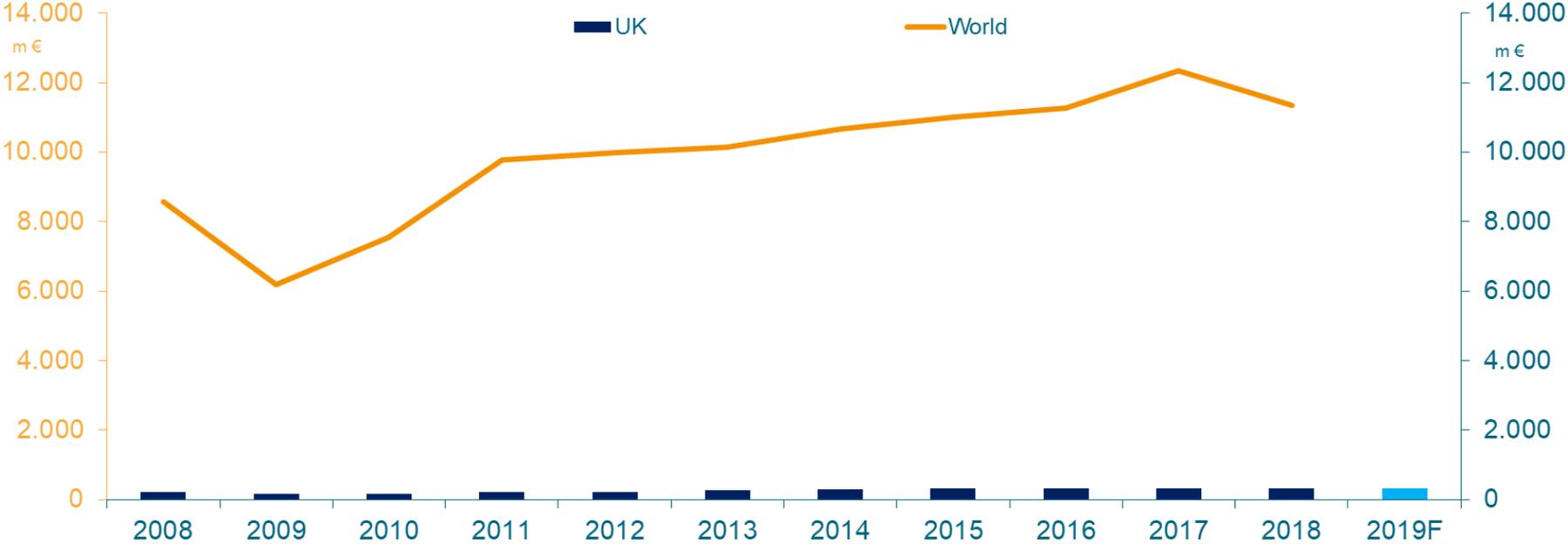
*) Chapter 84 in HS trade system: Nuclear reactors, boilers, machinery and mechanical appliances and parts thereof.

**) First, second and third round of US tariffs against China and Chinese retaliatory tariffs.

***) Additional tariffs raised from 10% to 25%.

Source: USITC, VDMA.

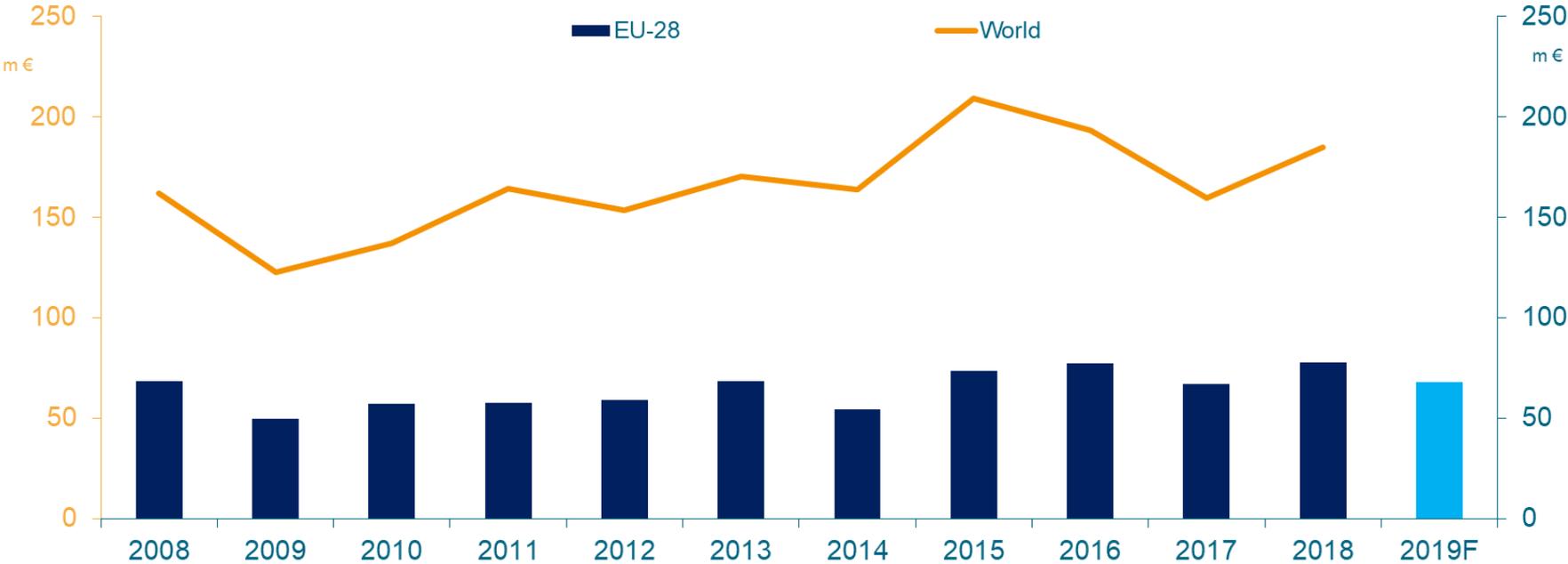
EU-28 Exports to UK/World Plastics and Rubber Machinery



F = Forecast

Source: VDMA

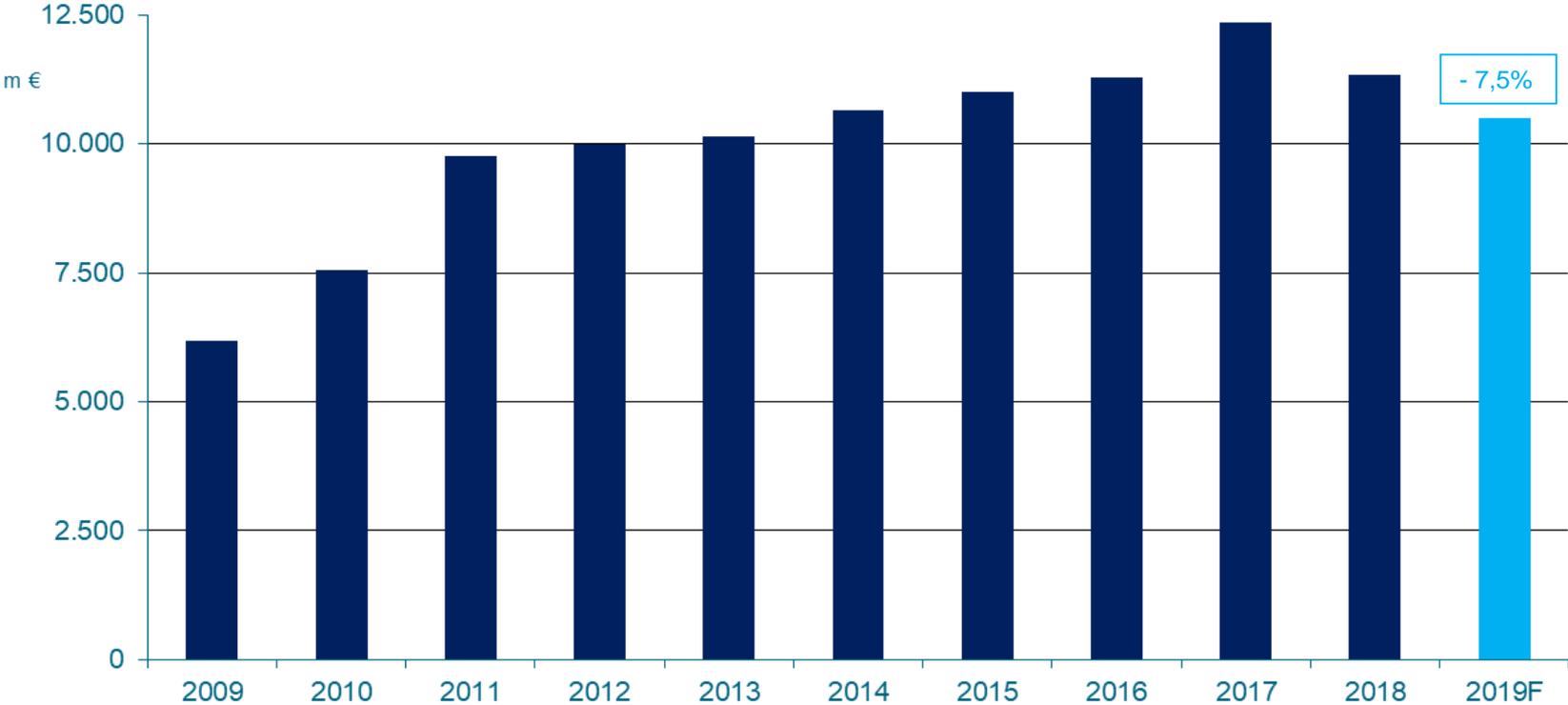
United Kingdom Exports to EU-28/World Plastics and Rubber Machinery



F = Forecast

Source: VDMA

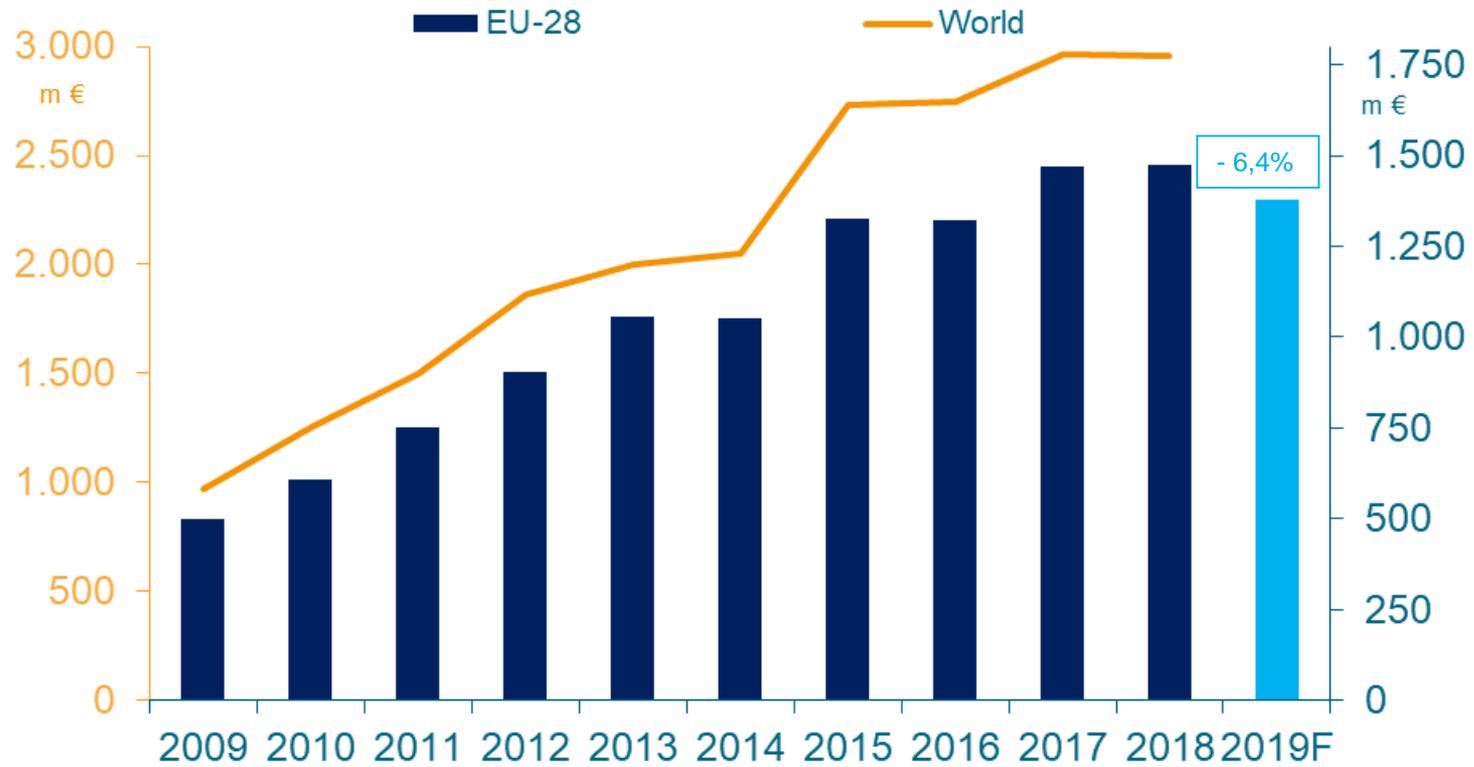
EU-28 Exports to the World Plastics and Rubber Machinery



F = Forecast

Source: VDMA

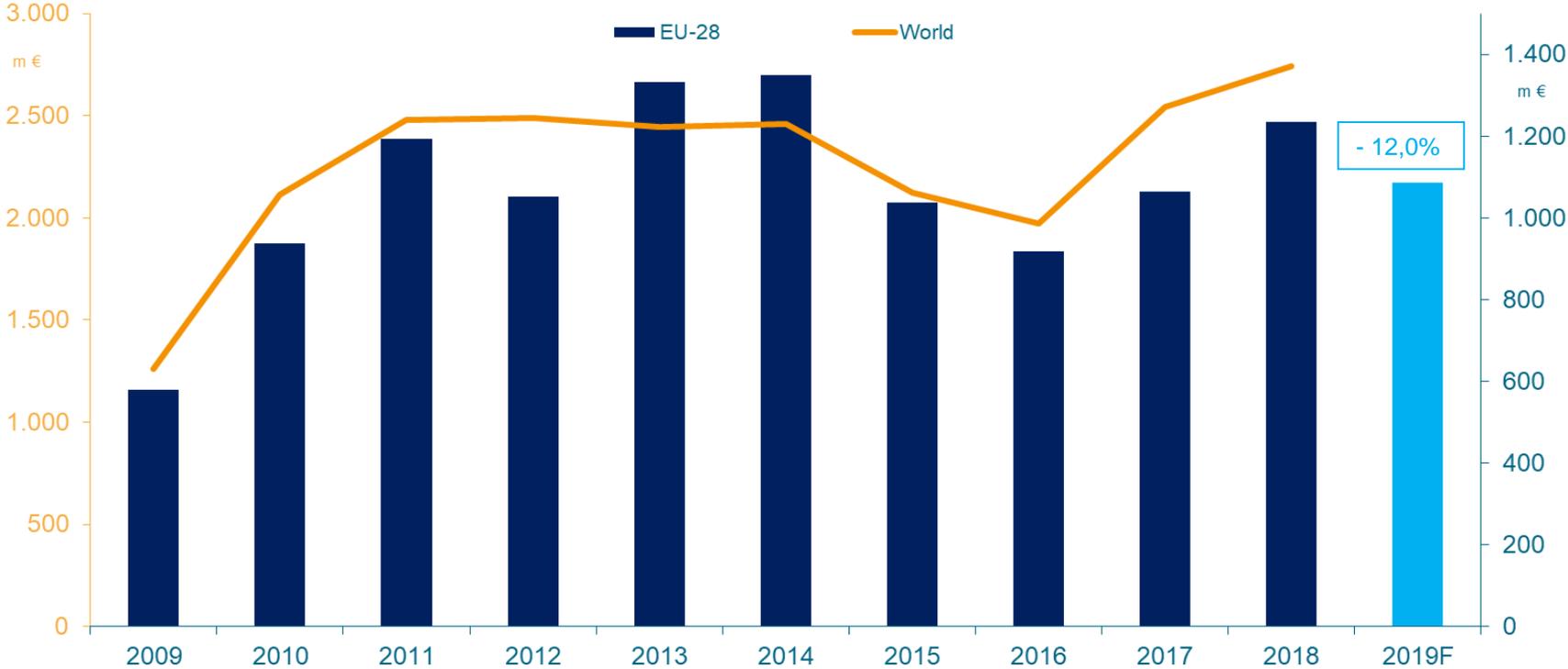
Exports to USA Plastics and Rubber Machinery



F = Forecast

Source: VDMA

Exports to China Plastics and Rubber Machinery



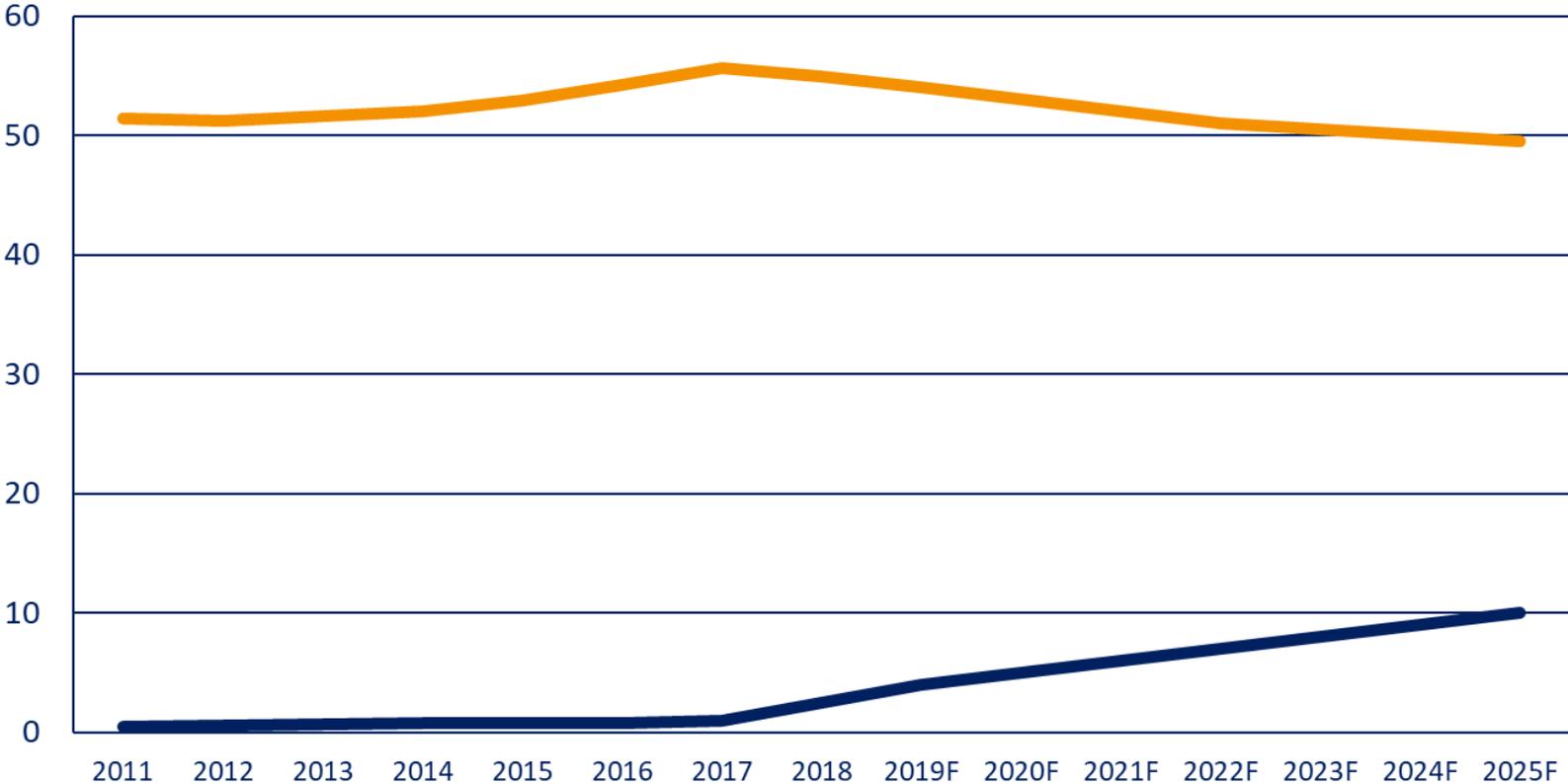
F = Forecast

Source: VDMA

Game Changer - Circular Economy

European Plastics Consumption (m tons)

Virgin Material Recycled Material



Game Changer Circular Economy

- Use of recyclates in Europe should reach 10 million tons by 2025 (2.5 million in 2019) European Commission – EU Plastics Strategy
- 100 percent of plastics packaging should be recyclable by 2030 (European Commission – EU Plastics Strategy)
 - Image of plastics packaging improves
 - Market will shift towards recyclates
 - Circular Economy is growing
 - Machine manufacturers deliver enabling technology

Production 2018

- World: 36.8 bn €
- EUROMAP: 15.6 bn €
- Germany: 7.9 bn €
- Italy: 2.9 bn €

Forecast 2019 & 2020

- World: -10% (2019: 33.1 bn €) | -5% (2020: 31.5 bn €)
- EUROMAP: -10% (2019: 14.0 bn €) | -5% (2020: 13.3 bn €)
- Germany: -10% (2019: 7.1 bn €) | -5% (2020: 6.7 bn €)
- Italy: -10% (2019: 2.6 bn €) | -5% (2020: 2.5 bn €)