European Die Casting Machinery

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World export shares for die casting machinery
2013 / 2014*

2013

CEMAFON Countries 30%

Others 24%

USA 6%

China 10%

Japan 30%

Total world exports of 43 countries: ca. € 920 million

2014

CEMAFON Countries 32%

Others 23,5%

USA 3,5%

China 11%

Japan 30%

Total world exports of 43 countries: ca. € 907 million

* incl. other foundry machinery

Source: National and VDMA statistics
World machinery trade – major export nations for die casting machinery 2013 / 2014*

<table>
<thead>
<tr>
<th>Country</th>
<th>2013 Export Volume</th>
<th>2014 Export Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>€920 million</td>
<td>€907 million</td>
</tr>
<tr>
<td>Italy</td>
<td>€139,193</td>
<td>€196,905</td>
</tr>
<tr>
<td>China</td>
<td>€96,575</td>
<td>€71,935</td>
</tr>
<tr>
<td>Germany</td>
<td>€69,429</td>
<td>€75,610</td>
</tr>
<tr>
<td>Switzerland</td>
<td>€50,597</td>
<td>€61,083</td>
</tr>
<tr>
<td>USA</td>
<td>€31,263</td>
<td>€50,597</td>
</tr>
<tr>
<td>Rep. of Korea</td>
<td>€18,190</td>
<td>€23,926</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>€40,401</td>
<td>€19,356</td>
</tr>
<tr>
<td>Taiwan</td>
<td>€18,476</td>
<td>€19,197</td>
</tr>
<tr>
<td>Austria</td>
<td>€15,351</td>
<td>€16,610</td>
</tr>
</tbody>
</table>

* incl. other foundry machinery

Source: National and VDMA statistics
Structure of CEMA FON exports of die casting machinery by world regions 2013 / 2014*

Total export volume CEMA FON 2013: € 274 million
Total export volume CEMA FON 2014: € 293 million

* incl. other foundry machinery

Source: National and VDMA statistics
## Structure of European foundry supplying industry – Great lever in the value chain

<table>
<thead>
<tr>
<th>Estimate* of CEMAFON key data</th>
<th>/</th>
<th>world industry spotlights**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production volume</td>
<td>2,3 billion Euro</td>
<td></td>
</tr>
<tr>
<td>Employees</td>
<td>10,000</td>
<td></td>
</tr>
<tr>
<td>Number of companies</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>ca. 230,000 Euros / employee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>World metal casting production</td>
<td>103,229,774 metric tons (2013)</td>
<td></td>
</tr>
<tr>
<td>World motor vehicle production</td>
<td>89,747,430 units (2014)</td>
<td></td>
</tr>
<tr>
<td>World crude steel production</td>
<td>1,649 megatons (2013)</td>
<td></td>
</tr>
<tr>
<td>World machinery turnover (2014)</td>
<td>2,330 billion Euros</td>
<td></td>
</tr>
</tbody>
</table>

*) Estimate based on export data, assuming a production / export ratio of 50%
**) Modern casting / 48th World census; OICA; Worldsteel Association; VDMA estimate
Global NF-casting production – Europe second worldwide

Comparison 2013:2000

- China: +525%
- CAEF: +19%
- USA: +27%
- Japan: +15%
- India: +352%
- Russia: ±0%

Source: CAEF
Typical customer structure for NF-castings – Importance of vehicle industry

- Vehicles: 73%
- Electrical engineering: 8%
- Building industry: 5%
- Steel industry: 5%
- Engineering: 2%
- Other: 7%

Source: BDG
2015 World GDP growth forecasts – Asia remains driving force

Development of Gross Domestic Product (GDP) 2015, real annual percentage change

Annual percent change:
- 10% and more
- 6% - 10%
- 3% - 6%
- 0% - 3%
- less than 0%
- not specified

Source: IMF