

**EUROMAP Markets**

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# **EUROMAP ECONOMIC SURVEY**

## **2008**

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### **Content:**

- **Overview on the Industry 2007**
- **Aggregated 3-Years Summary 2005 – 2007\***
- **Production by Countries 2007 (2006\*)**
- **Export by Countries 2007 (2006\*)**
- **Import by Countries 2007 (2006)**
- **Demand by Countries 2007 (2006\*)**

\* including revisions  
2005 and 2006 without Turkey

EUROMAP's member associations in Austria, France, Germany, Great Britain, Italy, Spain, Switzerland and Turkey reported 2007 data on production, exports and imports, the number of companies in the plastics and rubber industry and the workforce employed.

Figures are broken down to the core machinery business (pre-processing, converting, post-processing), moulds and dies for the plastics and rubber industries, auxiliary and peripheral equipment and finally flexographic printing machines for plastic film.

Data is mainly based on official statistical data; where this is not available estimates are provided by the associations.

The preliminary version of the survey is available only to the member companies of EUROMAP. After a revision of data in autumn 2008 the final version is published on EUROMAP's web site.

**Note:**

In order to facilitate the processing of data, points and decimal points (commas) are used according to central European application throughout the Economic Survey.

## Overview on the European Plastics and Rubber Machinery Industry in 2007

	Number of Companies*	Work Force Total	Production (mill. €)
Core Machinery (Pre-processing, Processing, Post-processing)	649	54.788	10.891
Moulds and Dies	2.691	32.855	4.329
Auxiliary and Peripheral Equipment	302	9.994	1.600
Flexographic Printing Machines for Plastic Films	41	2.165	528
<b>Total</b>	<b>3.683</b>	<b>99.802</b>	<b>17.348</b>

\* May contains double counting

Source: EUROMAP

## Aggregated 3-Years Summary on Production and Export of the European Plastics and Rubber Machinery Industry

(mill. €)	Production			Export		
	2005	2006	2007	2005	2006	2007
Core Machinery (Pre-processing, Processing, Post-processing)	9.198	9.957	10.891	6.581	7.198	8.409
Moulds and Dies	3.895	4.092	4.329	2.131	2.338	2.297
Auxiliary and Peripheral Equipment	1.214	1.471	1.600	714	984	1.080
Flexographic Printing Machines for Plastic Films	477	543	528	410	472	455
<b>Total</b>	<b>14.784</b>	<b>16.063</b>	<b>17.348</b>	<b>9.836</b>	<b>10.992</b>	<b>12.241</b>

Source: EUROMAP

## PRODUCTION

	2007 mill. €	2006 mill. €	2007/2006 %	Share %	Forecast 2008 %
<b>AUSTRIA</b>					
1. Core Machinery	989	867	14,1	71,2	11,0
2. Moulds & Dies	229	191	19,9	16,5	11,0
3. Auxiliary/Peripherals	172	151	13,9	12,4	11,0
4. Flexographic P/M	n.a.	n.a.	n.a.	n.a.	n.a.
<b>Country Total</b>	<b>1.390</b>	<b>1.209</b>	<b>15,0</b>	<b>100,0</b>	
<b>FRANCE</b>					
1. Core Machinery	1.058	953	11,0	60,8	-5,0
2. Moulds & Dies	627	617	1,6	36,0	-3,0
3. Auxiliary/Peripherals	50	37	35,1	2,9	2,0
4. Flexographic P/M	5	5	0,0	0,3	n.a.
<b>Country Total</b>	<b>1.740</b>	<b>1.612</b>	<b>7,9</b>	<b>100,0</b>	
<b>GERMANY</b>					
1. Core Machinery	5.240	4.876	7,5	65,4	8,0
2. Moulds & Dies	1.893	1.847	2,5	23,6	3,0
3. Auxiliary/Peripherals	698	624	11,9	8,7	11,0
4. Flexographic P/M	176	180	-2,2	2,2	2,0
<b>Country Total</b>	<b>8.007</b>	<b>7.527</b>	<b>6,4</b>	<b>100,0</b>	
<b>ITALY</b>					
1. Core Machinery	2.690	2.430	10,7	64,2	5,5
2. Moulds & Dies	720	550	30,9	17,2	-7,0
3. Auxiliary/Peripherals	600	600	0,0	14,3	6,0
4. Flexographic P/M	180	180	0,0	4,3	26,0
<b>Country Total</b>	<b>4.190</b>	<b>3.760</b>	<b>11,4</b>	<b>100,0</b>	
<b>SPAIN</b>					
1. Core Machinery	97	96	1,0	24,4	5,0
2. Moulds & Dies	189	210	-10,0	47,6	-4,0
3. Auxiliary/Peripherals	29	25	16,0	7,3	6,0
4. Flexographic P/M	82	80	2,5	20,7	5,0
<b>Country Total</b>	<b>397</b>	<b>411</b>	<b>-3,4</b>	<b>100,0</b>	
<b>SWITZERLAND</b>					
1. Core Machinery	602	570	5,6	60,4	3,0
2. Moulds & Dies	331	337	-1,8	33,2	3,0
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	63	85	-25,9	6,3	0,0
<b>Country Total</b>	<b>996</b>	<b>992</b>	<b>0,4</b>	<b>100,0</b>	
<b>TURKEY</b>					
1. Core Machinery	75	n.a.	n.a.	37,5	10,0
2. Moulds & Dies	90	n.a.	n.a.	45,0	10,0
3. Auxiliary/Peripherals	20	n.a.	n.a.	10,0	10,0
4. Flexographic P/M	15	n.a.	n.a.	7,5	10,0
<b>Country Total</b>	<b>200</b>	<b>n.a.</b>	<b>n.a.</b>	<b>100,0</b>	
<b>UNITED KINGDOM</b>					
1. Core Machinery	140	165	-15,2	32,3	-2,0
2. Moulds & Dies	250	340	-26,5	57,7	-2,0
3. Auxiliary/Peripherals	31	34	-8,8	7,2	1,0
4. Flexographic P/M	12	13	-7,7	2,8	0,0
<b>Country Total</b>	<b>433</b>	<b>552</b>	<b>-21,6</b>	<b>100,0</b>	
<b>EUROMAP AGGREGATED DATA</b>					
1. Core Machinery	10.891	9.957	9,4	62,8	6,0
2. Moulds & Dies	4.329	4.092	5,8	25,0	0,6
3. Auxiliary/Peripherals	1.600	1.471	8,8	9,2	7,8
4. Flexographic P/M	528	543	-2,8	3,0	10,6
<b>EUROMAP OVERALL</b>	<b>17.348</b>	<b>16.063</b>	<b>8,0</b>	<b>100,0</b>	

## EXPORT

	2007 mill. €	2006 mill. €	2007/2006 %	Share %
<b>AUSTRIA</b>				
1. Core Machinery	1.022	936	9,2	63,8
2. Moulds & Dies	340	293	16,0	21,2
3. Auxiliary/Peripherals	233	204	14,2	14,5
4. Flexographic P/M	8	0	/	0,5
<b>Country Total</b>	<b>1.603</b>	<b>1.433</b>	<b>11,9</b>	<b>100,0</b>
<b>FRANCE</b>				
1. Core Machinery	892	800	11,5	76,2
2. Moulds & Dies	251	268	-6,3	21,5
3. Auxiliary/Peripherals	25	17	47,1	2,1
4. Flexographic P/M	2	5	n.a.	n.a.
<b>Country Total</b>	<b>1.170</b>	<b>1.090</b>	<b>7,3</b>	<b>100,0</b>
<b>GERMANY</b>				
1. Core Machinery	3.815	3.584	6,4	76,1
2. Moulds & Dies	684	815	-16,1	13,6
3. Auxiliary/Peripherals	360	312	15,4	7,2
4. Flexographic P/M	153	183	-16,4	3,1
<b>Country Total</b>	<b>5.012</b>	<b>4.894</b>	<b>2,4</b>	<b>100,0</b>
<b>ITALY</b>				
1. Core Machinery	1.878	1.112	68,9	61,0
2. Moulds & Dies	655	590	11,0	21,3
3. Auxiliary/Peripherals	425	425	0,0	13,8
4. Flexographic P/M	119	123	-3,3	3,9
<b>Country Total</b>	<b>3.077</b>	<b>2.250</b>	<b>36,8</b>	<b>100,0</b>
<b>SPAIN</b>				
1. Core Machinery	76	63	20,6	35,7
2. Moulds & Dies	60	68	-11,8	28,2
3. Auxiliary/Peripherals	14	11	27,3	6,6
4. Flexographic P/M	63	65	-3,1	29,6
<b>Country Total</b>	<b>213</b>	<b>207</b>	<b>2,9</b>	<b>100,0</b>
<b>SWITZERLAND</b>				
1. Core Machinery	541	513	5,5	64,0
2. Moulds & Dies	247	253	-2,4	29,2
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	57	77	-26,0	6,7
<b>Country Total</b>	<b>845</b>	<b>843</b>	<b>0,2</b>	<b>100,0</b>
<b>TURKEY</b>				
1. Core Machinery	27	n.a.	n.a.	37,0
2. Moulds & Dies	2	n.a.	n.a.	2,7
3. Auxiliary/Peripherals	9	n.a.	n.a.	12,3
4. Flexographic P/M	35	n.a.	n.a.	47,9
<b>Country Total</b>	<b>73</b>	<b>n.a.</b>	<b>n.a.</b>	<b>100,0</b>
<b>UNITED KINGDOM</b>				
1. Core Machinery	158	190	-16,8	63,7
2. Moulds & Dies	58	51	13,7	23,4
3. Auxiliary/Peripherals	14	15	-6,7	5,6
4. Flexographic P/M	18	19	-5,3	7,3
<b>Country Total</b>	<b>248</b>	<b>275</b>	<b>-9,8</b>	<b>100,0</b>
<b>EUROMAP AGGREGATED DATA</b>				
1. Core Machinery	8.409	7.198	16,8	68,7
2. Moulds & Dies	2.297	2.338	-1,8	18,8
3. Auxiliary/Peripherals	1.080	984	9,8	8,8
4. Flexographic P/M	455	472	-3,6	3,7
<b>EUROMAP OVERALL</b>	<b>12.241</b>	<b>10.992</b>	<b>11,4</b>	<b>100,0</b>

## IMPORT

	2007 mill. €	2006 mill. €	2007/2006 %	Share %
<b>AUSTRIA</b>				
1. Core Machinery	292	232	25,9	44,6
2. Moulds & Dies	150	108	38,9	22,9
3. Auxiliary/Peripherals	204	179	14,0	31,2
4. Flexographic P/M	8	0	/	1,2
<b>Country Total</b>	<b>654</b>	<b>519</b>	<b>26,0</b>	<b>100,0</b>
<b>FRANCE</b>				
1. Core Machinery	418	377	10,9	61,6
2. Moulds & Dies	235	231	1,7	34,6
3. Auxiliary/Peripherals	15	6	150,0	2,2
4. Flexographic P/M	11	10	10,0	1,6
<b>Country Total</b>	<b>679</b>	<b>624</b>	<b>8,8</b>	<b>100,0</b>
<b>GERMANY</b>				
1. Core Machinery	840	685	22,6	66,8
2. Moulds & Dies	393	484	-18,8	31,2
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	25	27	-7,4	2,0
<b>Country Total</b>	<b>1.258</b>	<b>1.196</b>	<b>5,2</b>	<b>100,0</b>
<b>ITALY</b>				
1. Core Machinery	366	362	1,1	61,1
2. Moulds & Dies	217	204	6,4	36,2
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	16	20	-20,0	2,7
<b>Country Total</b>	<b>599</b>	<b>586</b>	<b>2,2</b>	<b>100,0</b>
<b>SPAIN</b>				
1. Core Machinery	340	263	29,3	70,5
2. Moulds & Dies	119	113	5,3	24,7
3. Auxiliary/Peripherals	16	14	14,3	3,3
4. Flexographic P/M	7	10	-30,0	1,5
<b>Country Total</b>	<b>482</b>	<b>400</b>	<b>20,5</b>	<b>100,0</b>
<b>SWITZERLAND</b>				
1. Core Machinery	201	186	8,1	52,9
2. Moulds & Dies	174	175	-0,6	45,8
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	5	8	-37,5	1,3
<b>Country Total</b>	<b>380</b>	<b>369</b>	<b>3,0</b>	<b>100,0</b>
<b>TURKEY</b>				
1. Core Machinery	216	n.a.	n.a.	61,9
2. Moulds & Dies	35	n.a.	n.a.	10,0
3. Auxiliary/Peripherals	27	n.a.	n.a.	7,7
4. Flexographic P/M	71	n.a.	n.a.	20,3
<b>Country Total</b>	<b>349</b>	<b>n.a.</b>	<b>n.a.</b>	<b>100,0</b>
<b>UNITED KINGDOM</b>				
1. Core Machinery	324	298	8,7	60,7
2. Moulds & Dies	85	116	-26,7	15,9
3. Auxiliary/Peripherals	110	112	-1,8	20,6
4. Flexographic P/M	15	16	-6,3	2,8
<b>Country Total</b>	<b>534</b>	<b>542</b>	<b>-1,5</b>	<b>100,0</b>
<b>EUROMAP AGGREGATED DATA</b>				
1. Core Machinery	2.997	2.403	24,7	60,7
2. Moulds & Dies	1.408	1.431	-1,6	28,5
3. Auxiliary/Peripherals	372	311	19,6	7,5
4. Flexographic P/M	158	91	73,6	3,2
<b>EUROMAP OVERALL</b>	<b>4.935</b>	<b>4.236</b>	<b>16,5</b>	<b>100,0</b>

## DEMAND

	2007 mill. €	2006 mill. €	2007/2006 %	Share %
<b>AUSTRIA</b>				
1. Core Machinery	259	163	58,9	86,9
2. Moulds & Dies	39	6	550,0	13,1
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	n.a.	n.a.	n.a.	n.a.
<b>Country Total</b>	<b>298</b>	<b>169</b>	<b>76,3</b>	<b>100,0</b>
<b>FRANCE</b>				
1. Core Machinery	584	530	10,2	47,3
2. Moulds & Dies	611	580	5,3	49,5
3. Auxiliary/Peripherals	40	26	53,8	3,2
4. Flexographic P/M	n.a.	n.a.		
<b>Country Total</b>	<b>1.235</b>	<b>1.136</b>	<b>8,7</b>	<b>100,0</b>
<b>GERMANY</b>				
1. Core Machinery	2.265	1.977	14,6	57,9
2. Moulds & Dies	1.602	1.516	5,7	40,9
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	48	24	100,0	1,2
<b>Country Total</b>	<b>3.915</b>	<b>3.517</b>	<b>11,3</b>	<b>100,0</b>
<b>ITALY</b>				
1. Core Machinery	1.178	1.680	-29,9	76,6
2. Moulds & Dies	282	164	72,0	18,3
3. Auxiliary/Peripherals	n.a.	n.a.	n.a.	n.a.
4. Flexographic P/M	77	77	0,0	5,0
<b>Country Total</b>	<b>1.537</b>	<b>1.921</b>	<b>-20,0</b>	<b>100,0</b>
<b>SPAIN</b>				
1. Core Machinery	361	296	22,0	54,2
2. Moulds & Dies	248	255	-2,7	37,2
3. Auxiliary/Peripherals	31	28	10,7	4,7
4. Flexographic P/M	26	25	4,0	3,9
<b>Country Total</b>	<b>666</b>	<b>604</b>	<b>10,3</b>	<b>100,0</b>
<b>SWITZERLAND</b>				
1. Core Machinery	262	243	7,8	49,3
2. Moulds & Dies	258	259	-0,4	48,6
3. Auxiliary/Peripherals	n.a.	n.a.		
4. Flexographic P/M	11	16	-31,3	2,1
<b>Country Total</b>	<b>531</b>	<b>518</b>	<b>2,5</b>	<b>100,0</b>
<b>TURKEY</b>				
1. Core Machinery	264	n.a.	n.a.	55,5
2. Moulds & Dies	123	n.a.	n.a.	25,8
3. Auxiliary/Peripherals	38	n.a.	n.a.	8,0
4. Flexographic P/M	51	n.a.	n.a.	10,7
<b>Country Total</b>	<b>476</b>	<b>n.a.</b>	<b>n.a.</b>	<b>100,0</b>
<b>UNITED KINGDOM</b>				
1. Core Machinery	306	273	12,1	42,6
2. Moulds & Dies	277	405	-31,6	38,5
3. Auxiliary/Peripherals	127	131	-3,1	17,7
4. Flexographic P/M	9	10	-10,0	1,3
<b>Country Total</b>	<b>719</b>	<b>819</b>	<b>-12,2</b>	<b>100,0</b>
<b>EUROMAP AGGREGATED DATA</b>				
1. Core Machinery	5.479	5.162	6,1	54,6
2. Moulds & Dies	3.440	3.185	8,0	34,3
3. Auxiliary/Peripherals	892	798	11,8	8,9
4. Flexographic P/M	231	162	42,6	2,3
<b>EUROMAP OVERALL</b>	<b>10.042</b>	<b>9.307</b>	<b>7,9</b>	<b>100,0</b>