

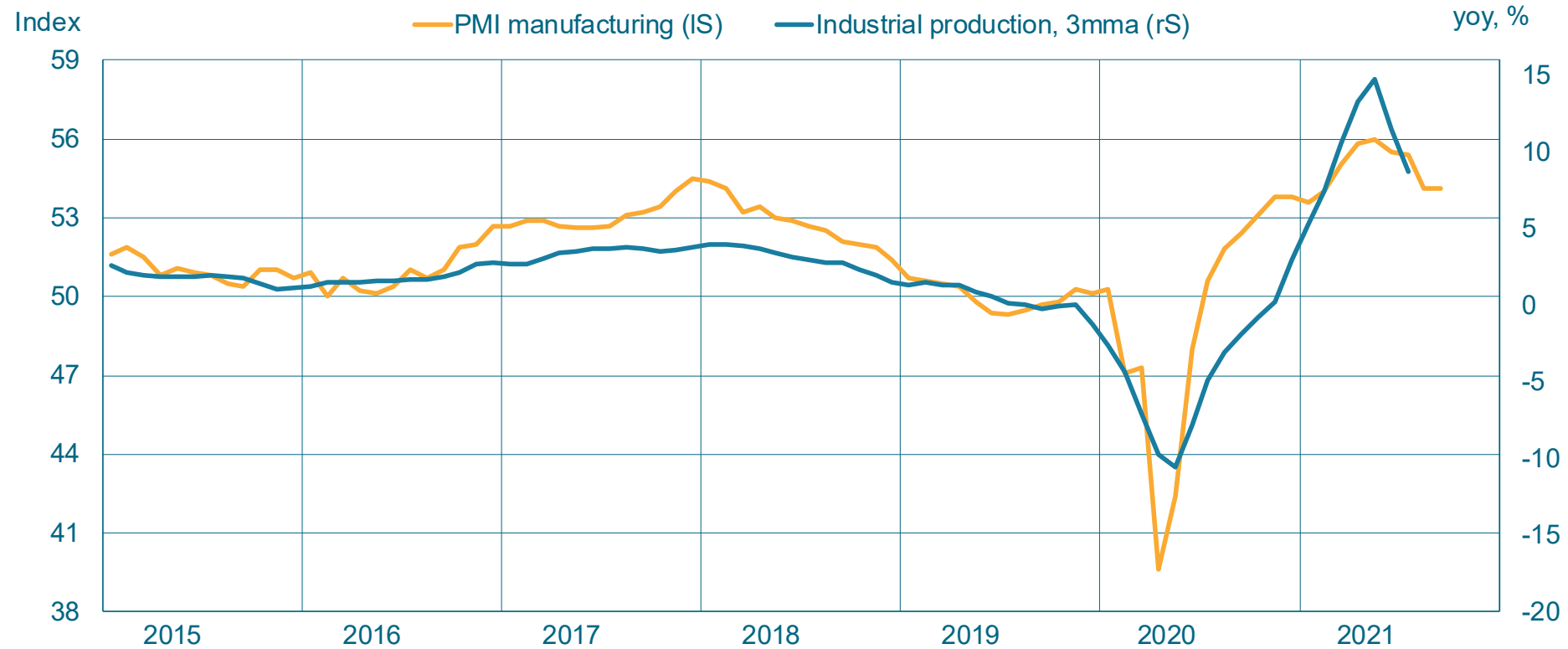
Global mechanical engineering
**End of the race to catch
up in sight?**

CETOP Meeting

online, October 7th 2021

www.vdma.org

World: Industrial production and Purchasing Managers' Index manufacturing (PMI)

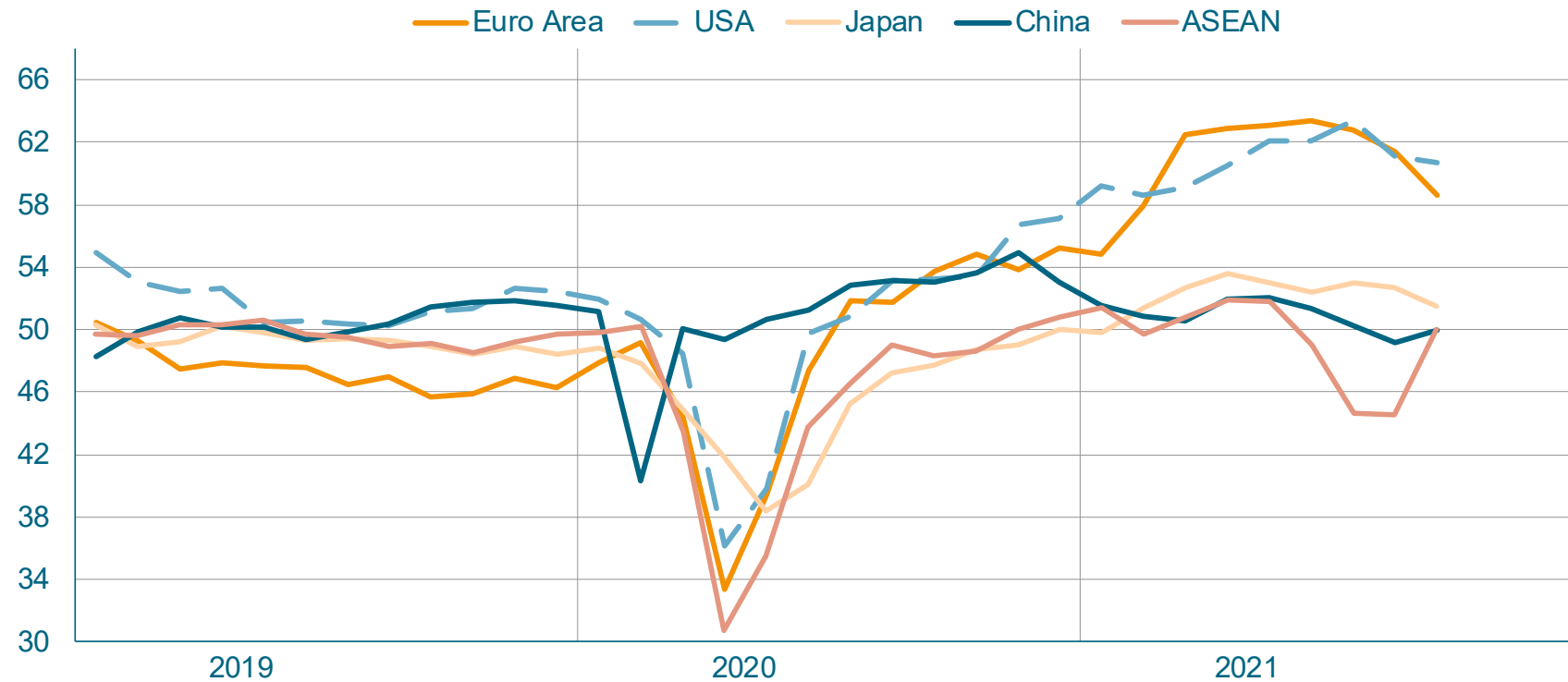


Source: cpb, IHS Markit, Macrobond, VDMA

PMI Manufacturing



Indices (50 = no changes)

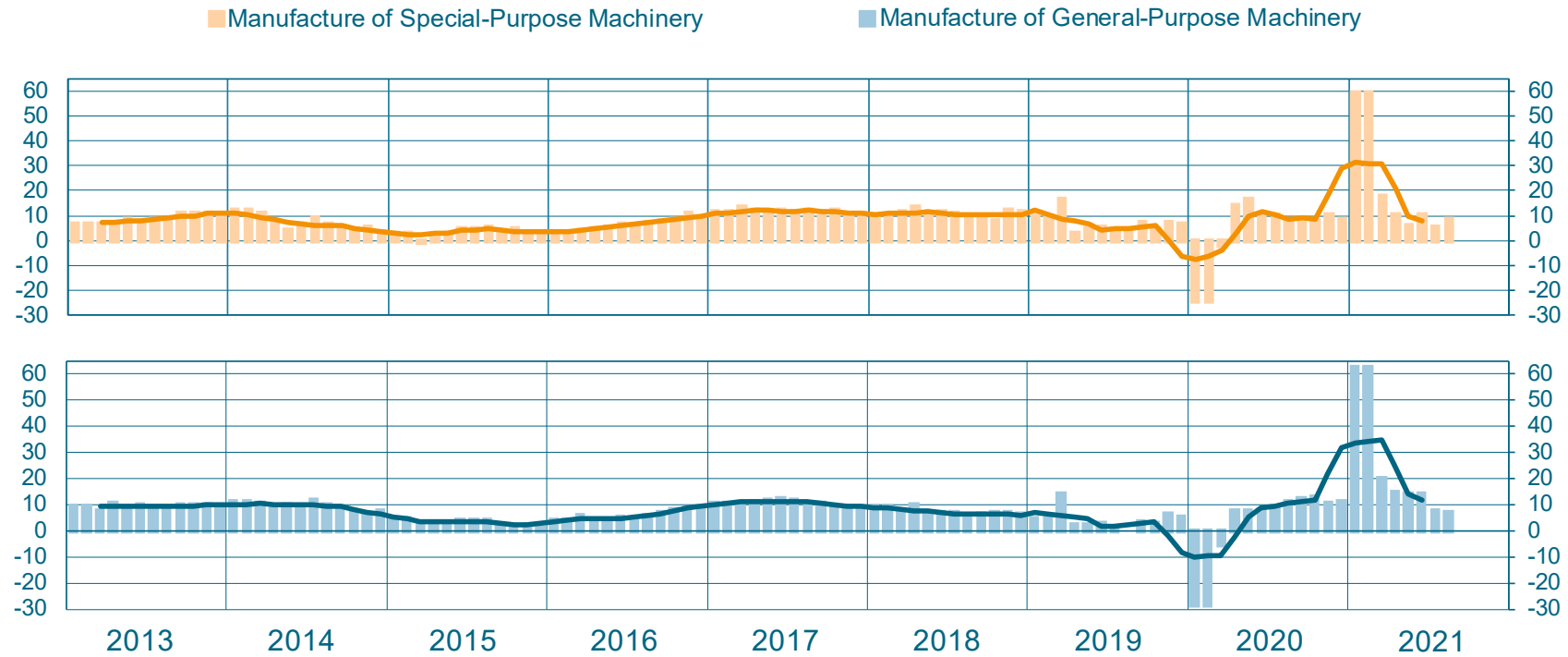


Source: IHS-Markit, Macrobond, VDMA

China: Industrial production by sectors



Real, yoy, %



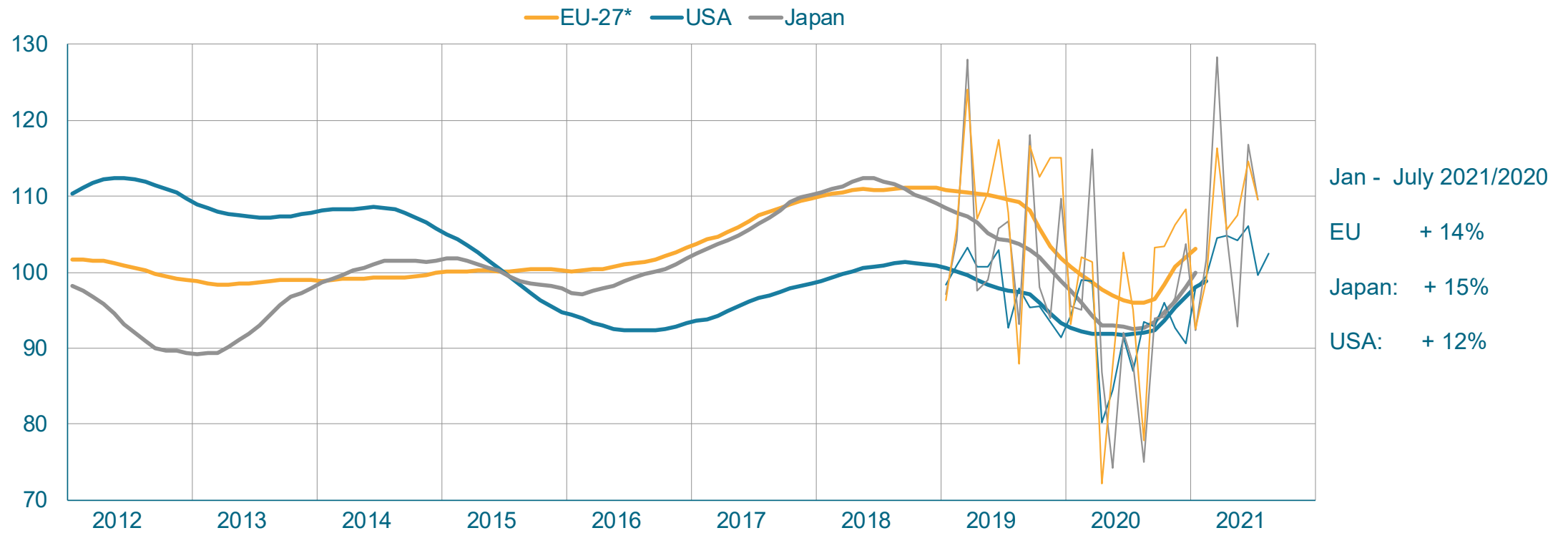
Source: NBS, Macrobond, VDMA

5-month moving average

EU / USA / JP: Machinery production



Volume index, 2015 = 100 and 12-months moving average



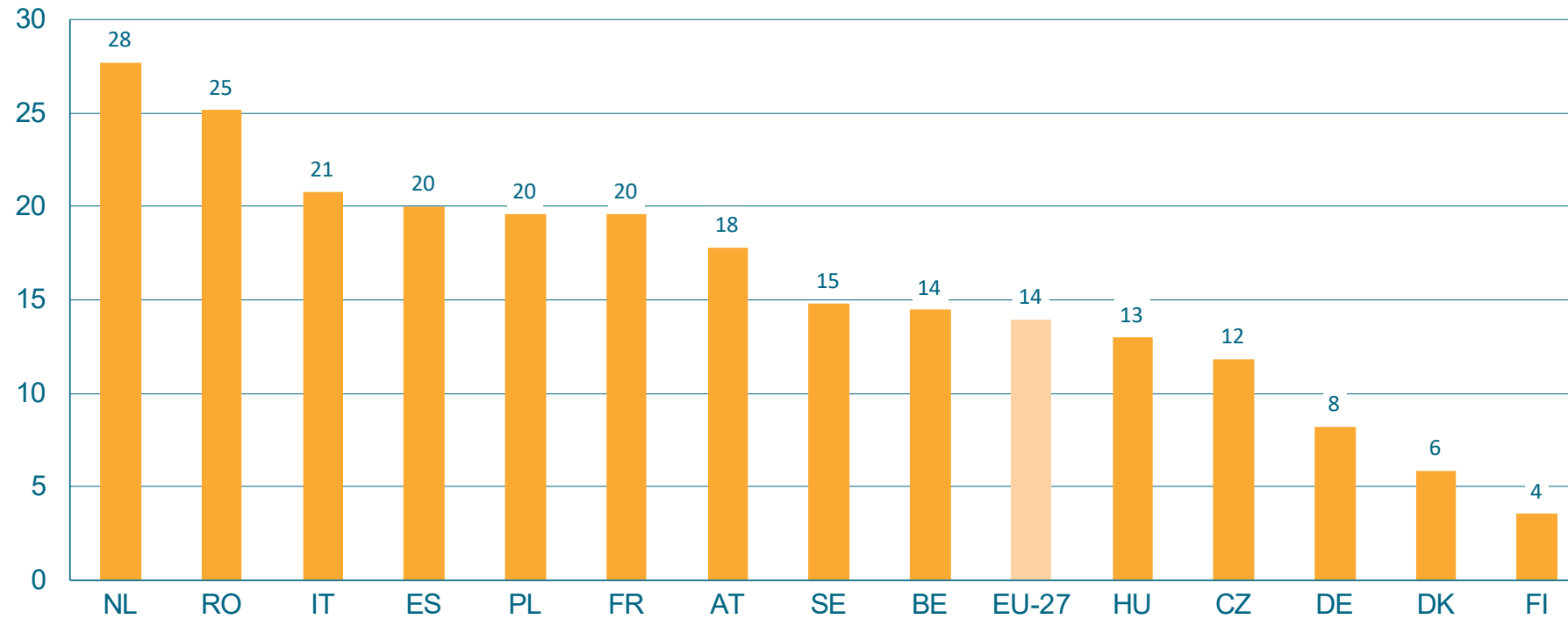
Source: Eurostat, Federal Reserve, METI, Macrobond, VDMA

*) NACE rev. 2 code 28.

EU-27: Production* in mechanical engineering



January - July 2021/2020, %, real, calendar adjusted

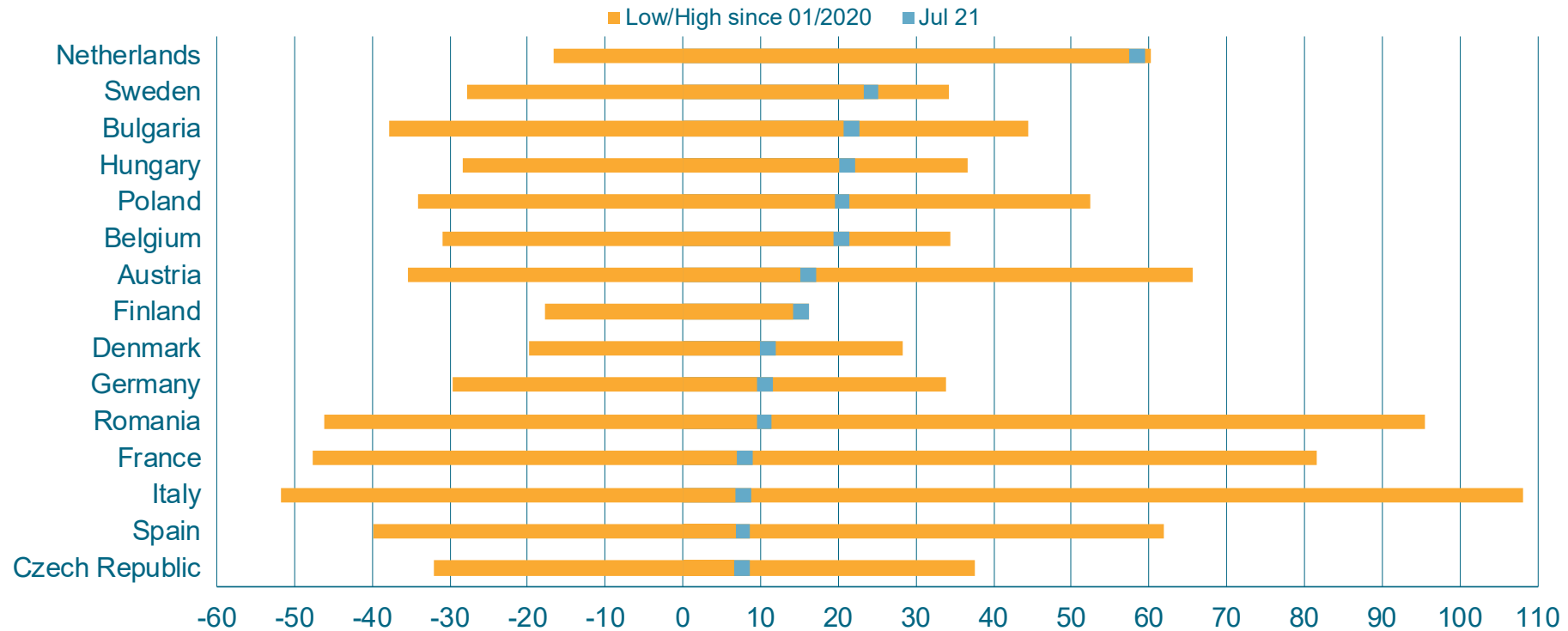


Source: Eurostat, Macrobond, VDMA

*) NACE rev. 2 code 28.

EU countries: Increases and decreases in machinery production since January 2020

Real, seasonal and calendar adjusted, %, yoy

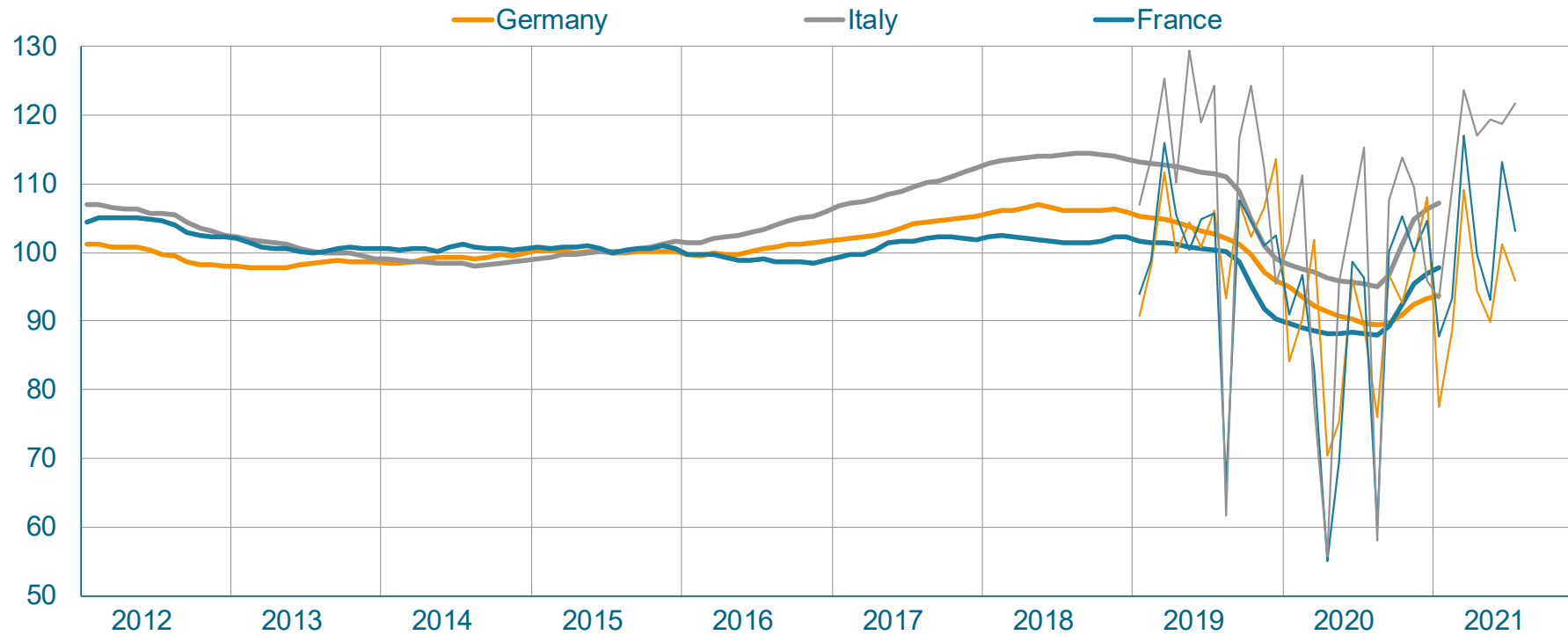


Source: Eurostat, Macrobond, VDMA

*) NACE rev.2 chapter 28.

Machinery production by countries

Volume index, 2015 = 100 and 12-months moving average



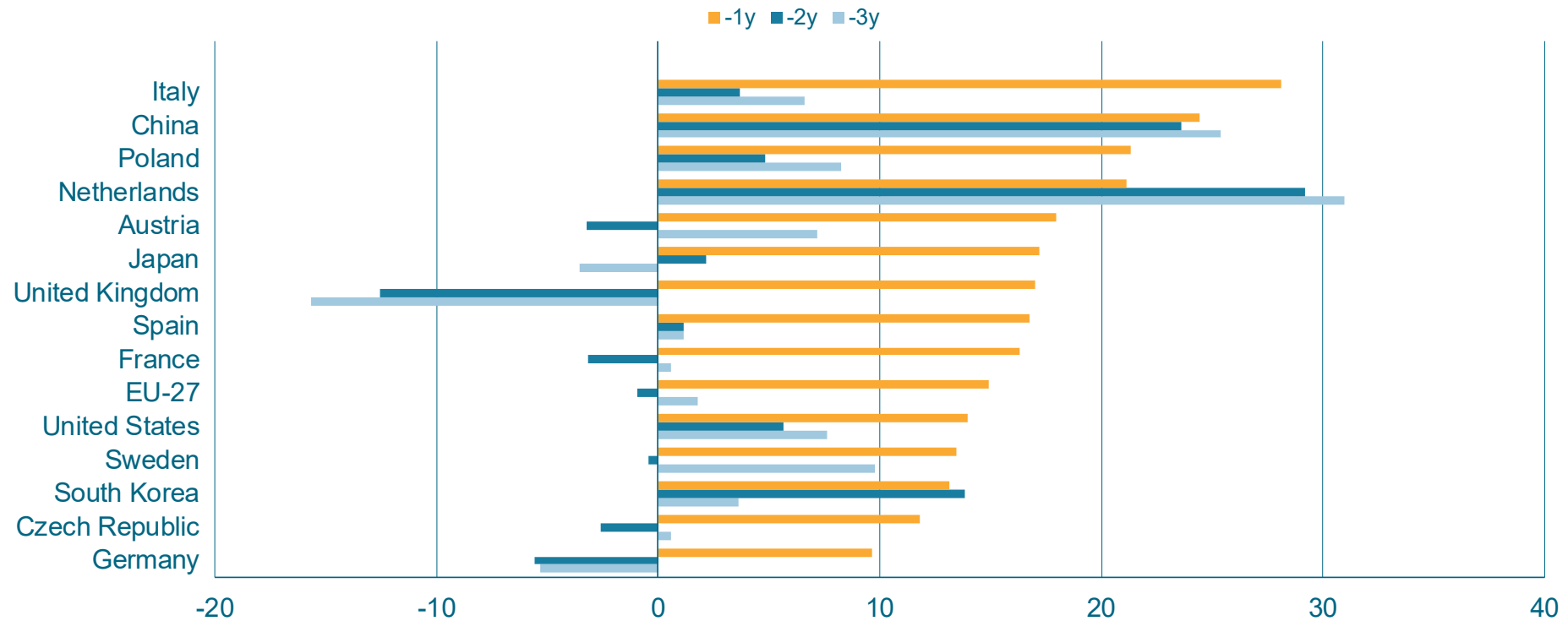
Source: Eurostat, Macrobond, VDMA

*) NACE rev. 2 code 28.

Machinery turnover compared with different previous years



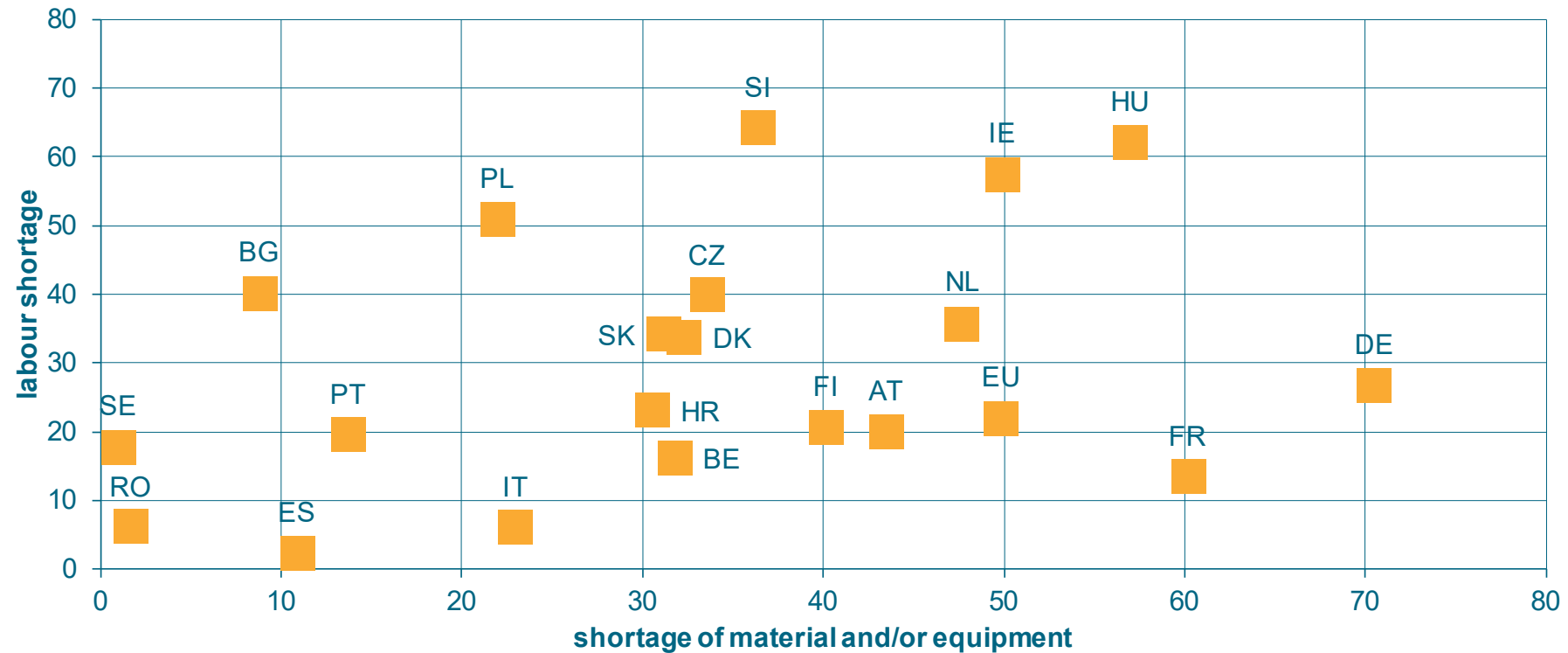
January - July 2021 to same period in previous years, %, values



Source: Eurostat, Nat. Statistics, Macrobond, VDMA

EU machinery industry: material/equipment and labour shortages - Q3 2021

% of businesses reporting limiting factors of production through ...

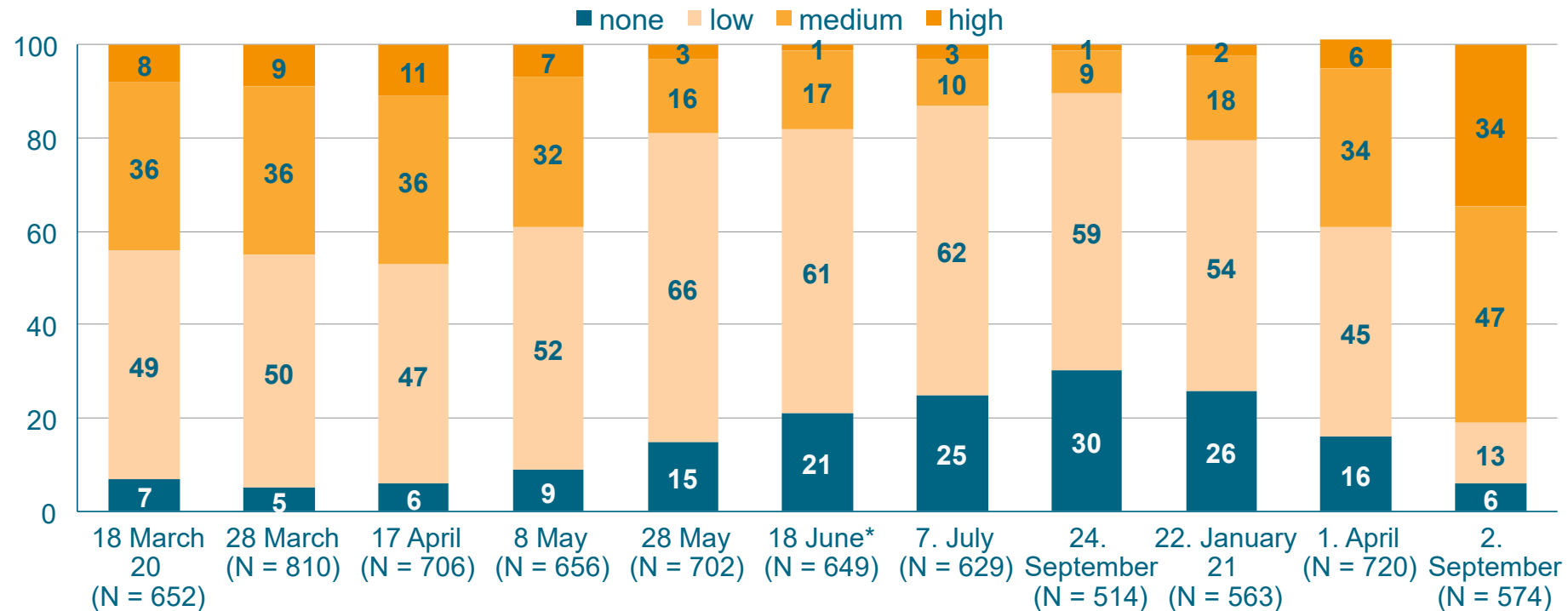


Source: EU Commission, Macrobond, VDMA

VDMA members: Disruptions in the supply chains



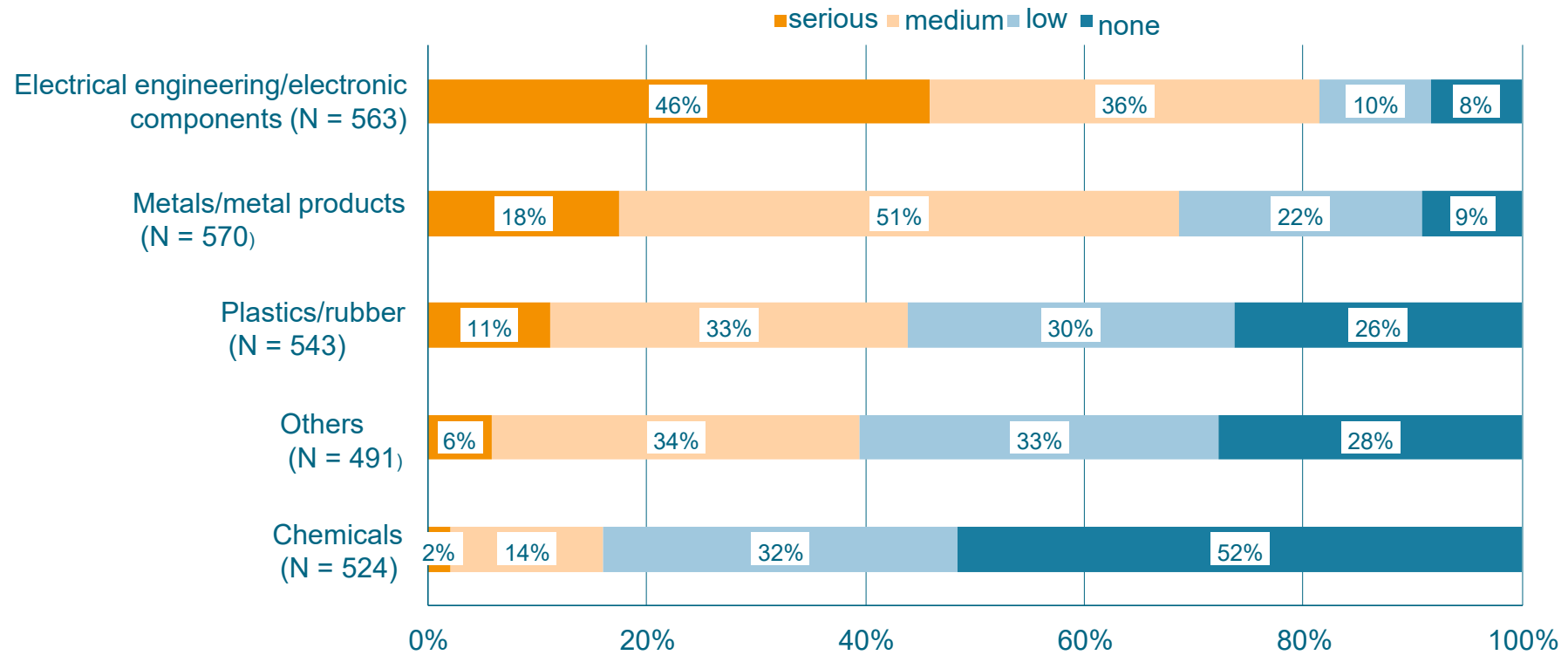
%-shares of answers



*limited comparability with previous surveys due to changed questioning
 Source: VDMA, flash surveys, March 2020 to September 2021

VDMA members: Shortages in the supply chain

%-shares of answers



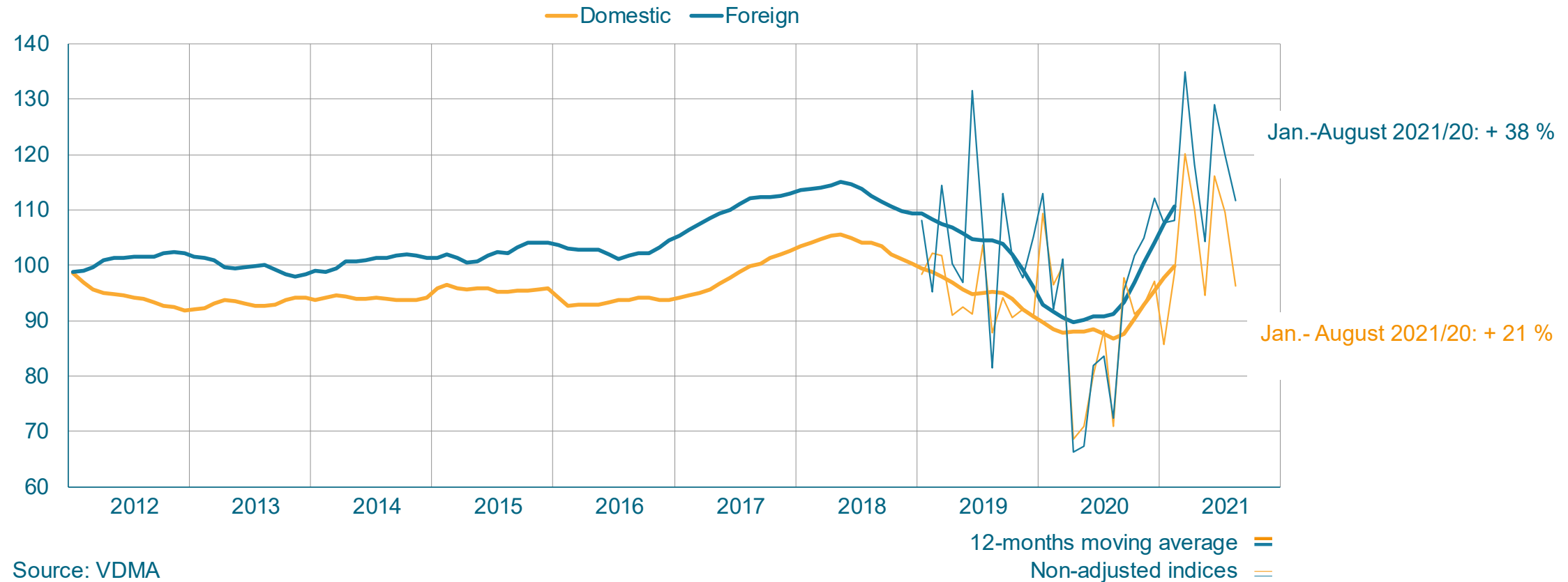
Source: VDMA, 11th flash survey, 2 September 2021

Germany: Incoming orders in mechanical engineering

Domestic and Foreign

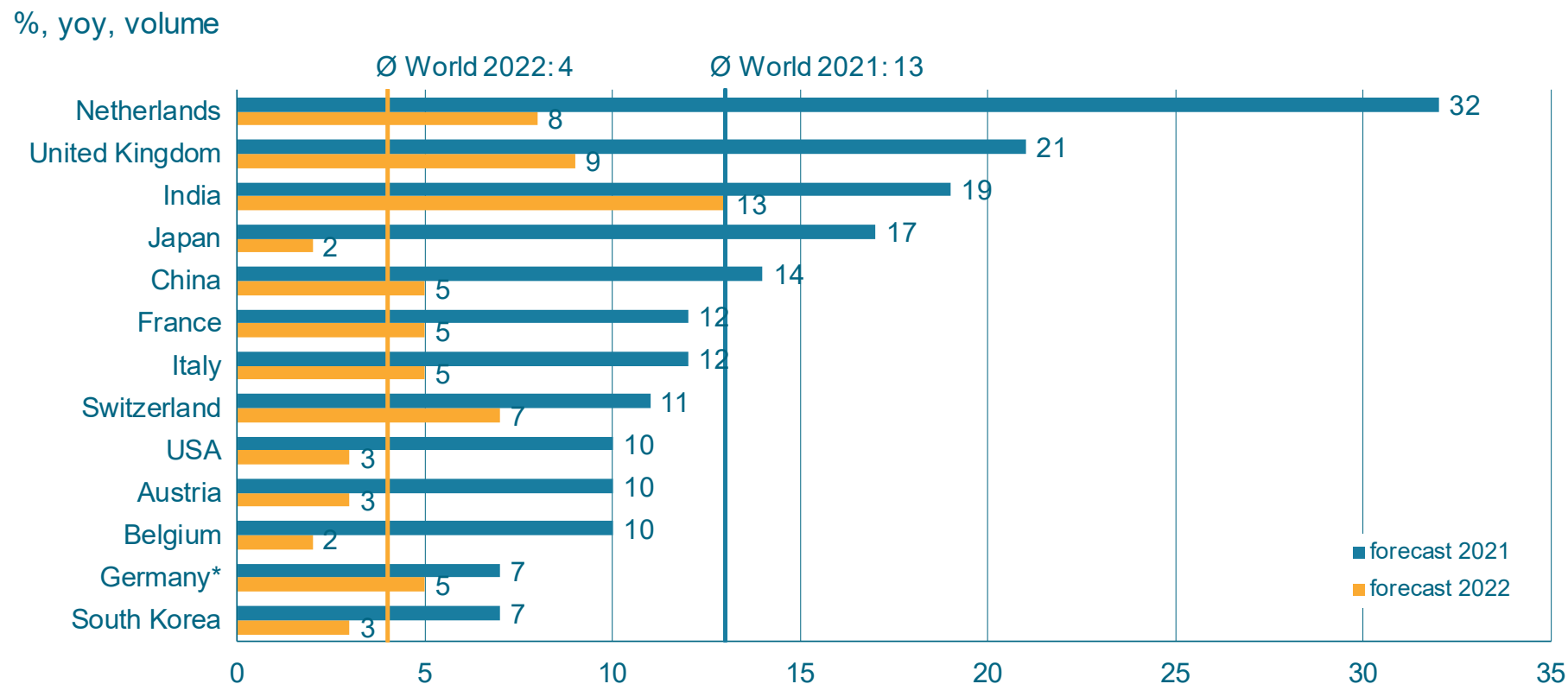


Volume index 2015 = 100



Source: VDMA

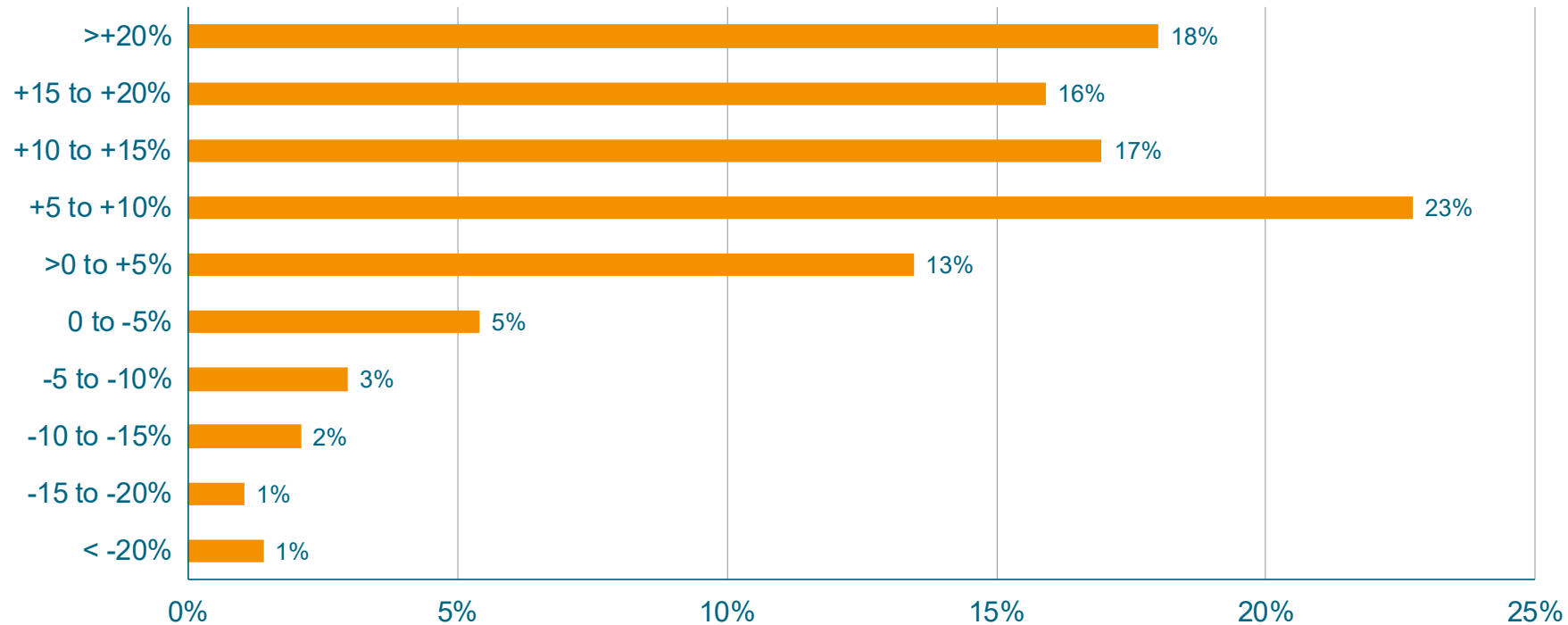
Mechanical engineering: Turnover according to Oxford Economics baseline forecast



*) The VDMA expects in Germany production to increase by 10 percent in 2021 and 5 percent in 2022.
Source: Eurostat, National Statistics, Oxford Economics, VDMA (Sept. 2021)

Mechanical engineering: Expected turnover development 2021 (prior-year comparison)

Evaluable Responses (N = 572)



Source: VDMA, 11th flash survey, 2 September 2021

Your contact.



Anke Uhlig

**VDMA Economics and Statistics
Lyoner Str. 18
60528 Frankfurt, Germany**

**Phone +49 69 6603-1388
Email anke.uhlig@vdma.org**