



Yesterday – Today – Tomorrow

Woodworking Machinery

January 12th 2021

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VDMA Woodworking Machinery

Preliminary Figures 2020

Woodworking Machinery in Germany

	2020	2019	YOY [%]
Production (bn. Euro)*	2,86	3,37	-15,0
Export (bn. Euro)**	1,88	2,21	-14,7
Import (m. Euro)**	541	536	+1,0

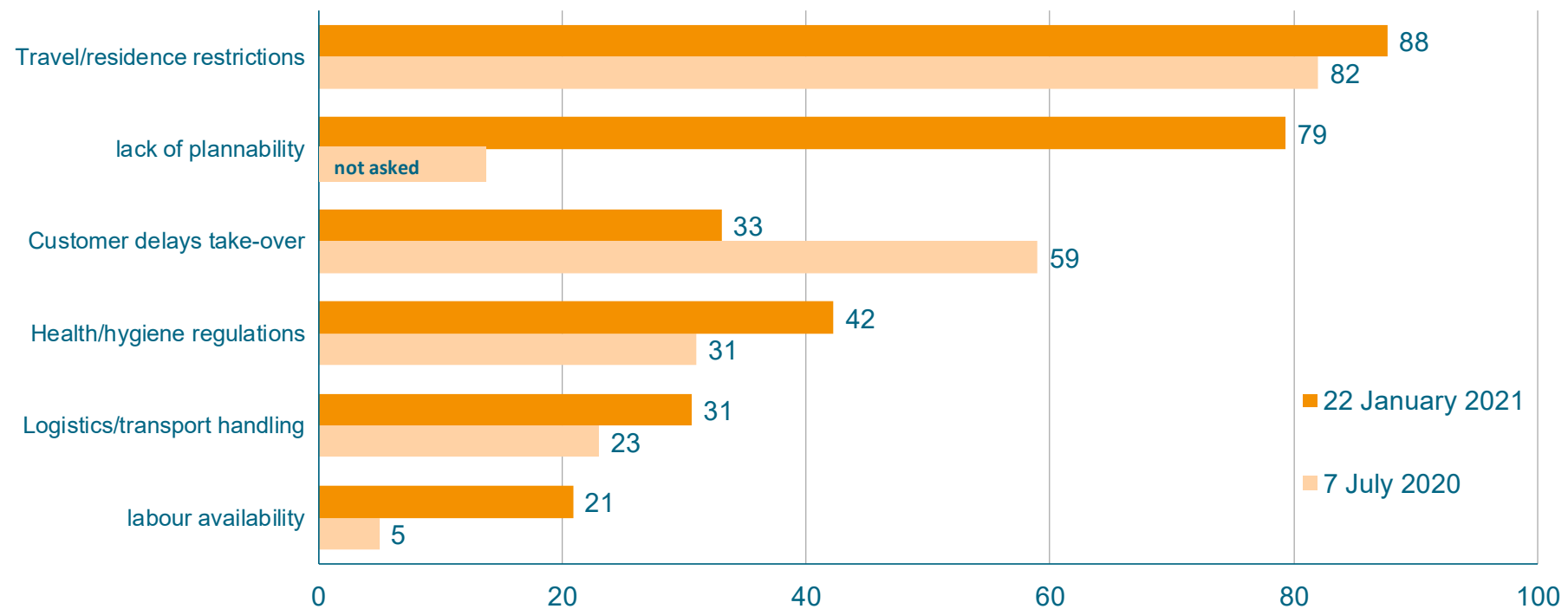
*Estimate for entire 2020: -15%

**January – November 2020/2019

Source: VDMA, Statistisches Bundesamt

Machinery Industry - Impairments

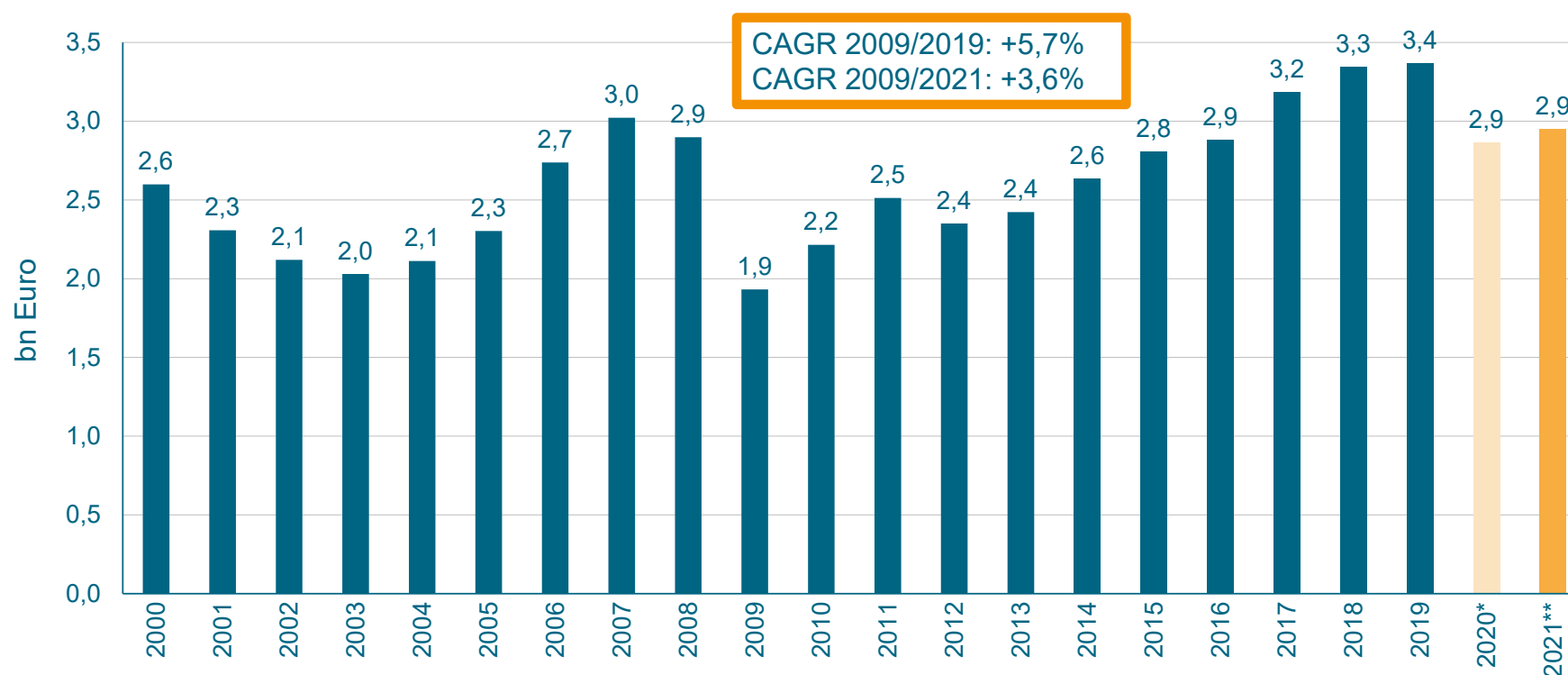
Business Significantly Affected



Source: VDMA, flash surveys on coronavirus, July 2020 to January 2021

German Production of Woodworking Machinery

With Confidence into the New Year



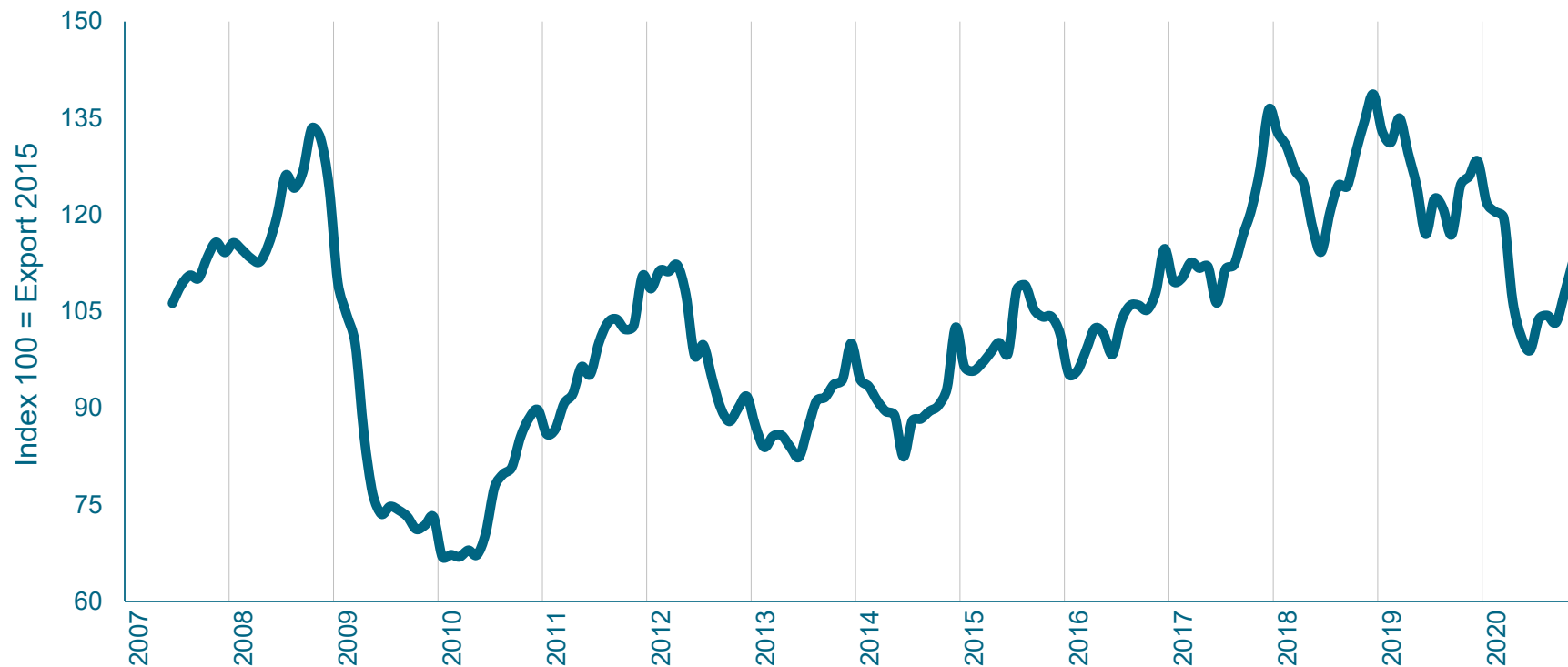
*Estimate: -15%

** Prognosis: +3%

Source: VDMA, Statistisches Bundesamt

German Export of Woodworking Machinery

Things are Looking up again

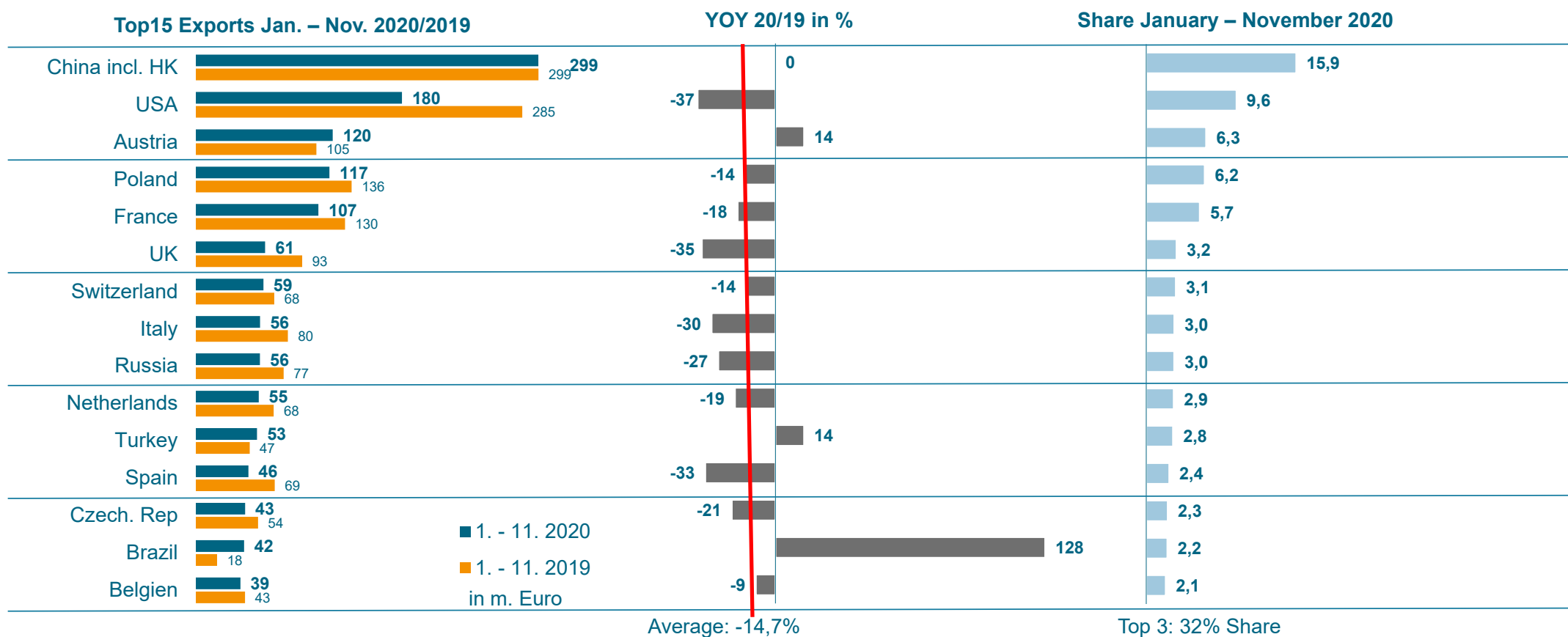


German Export
January – November 2020: -14,7%

Source: VDMA, Statistisches Bundesamt

German Export of Woodworking Machinery

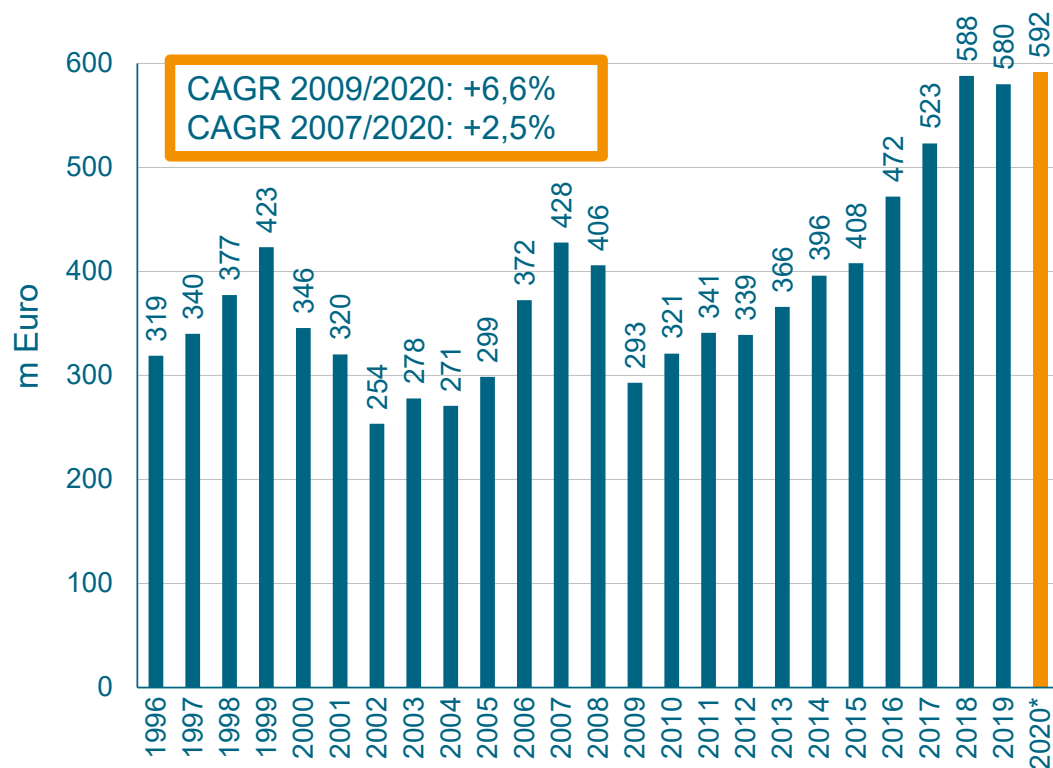
China and Austria in Investment Mood



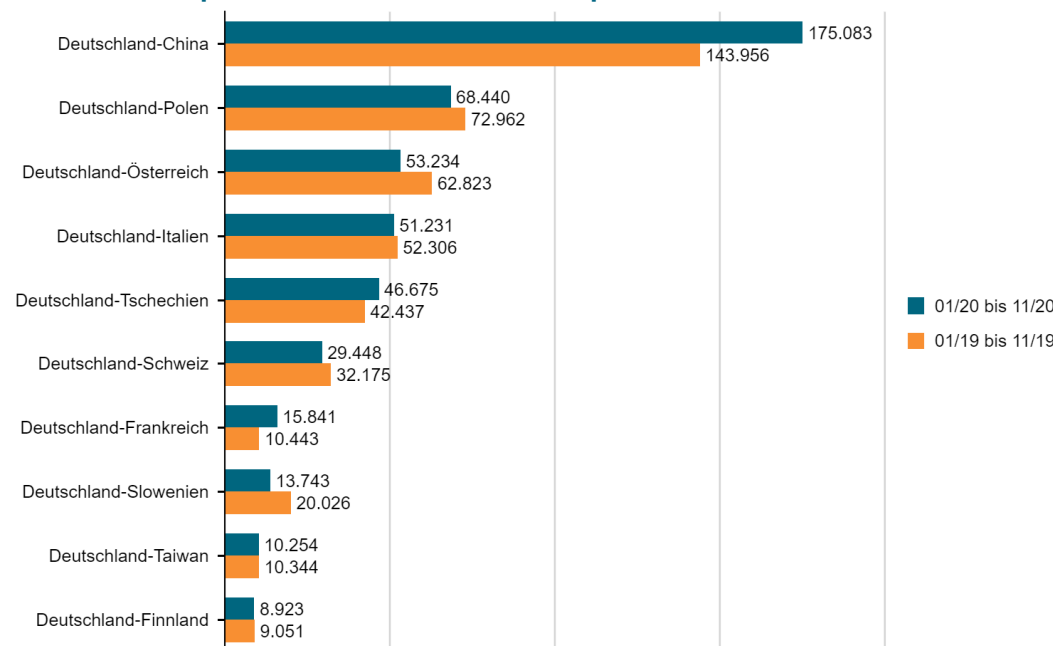
Top 3: 32% Share
 Top 15: 71% Share
 Source: VDMA, Statistisches Bundesamt

German Import of Woodworking Machinery

International Integration has Increased Massively



German Import Jan.-Nov. 2020/2019 – Top 10 Countries



*Estimate: +2% für 2020

Source: VDMA, Statistisches Bundesamt



“Our buildings generate 40% of our emissions. They need to become less wasteful, less expensive and more sustainable. And we know that the construction sector can even be turned from a carbon source into a carbon sink, **if organic building materials like wood** and smart technologies like AI are applied.”

September 16 2020: EU Parliament
Pic Source: EU Commission



Our View of the Customers - the Glass Half Full!

» Construction Industry:

- Positive signs in DACH, Eastern Europe, NAM
- Supports Sawmill, WBP, and construction elements industry
- Special boom in wooden housing industry

» Primary Processing:

- Good income situation
- Sawmills are running on high capacity
- Solid investments in WBP industry in Q4

» Furniture Industry:

- Germany and partly Europe good business in Q3+Q4
- China: V-shaped recovery
- Larger capital investments slower than less capital intense replacement invests

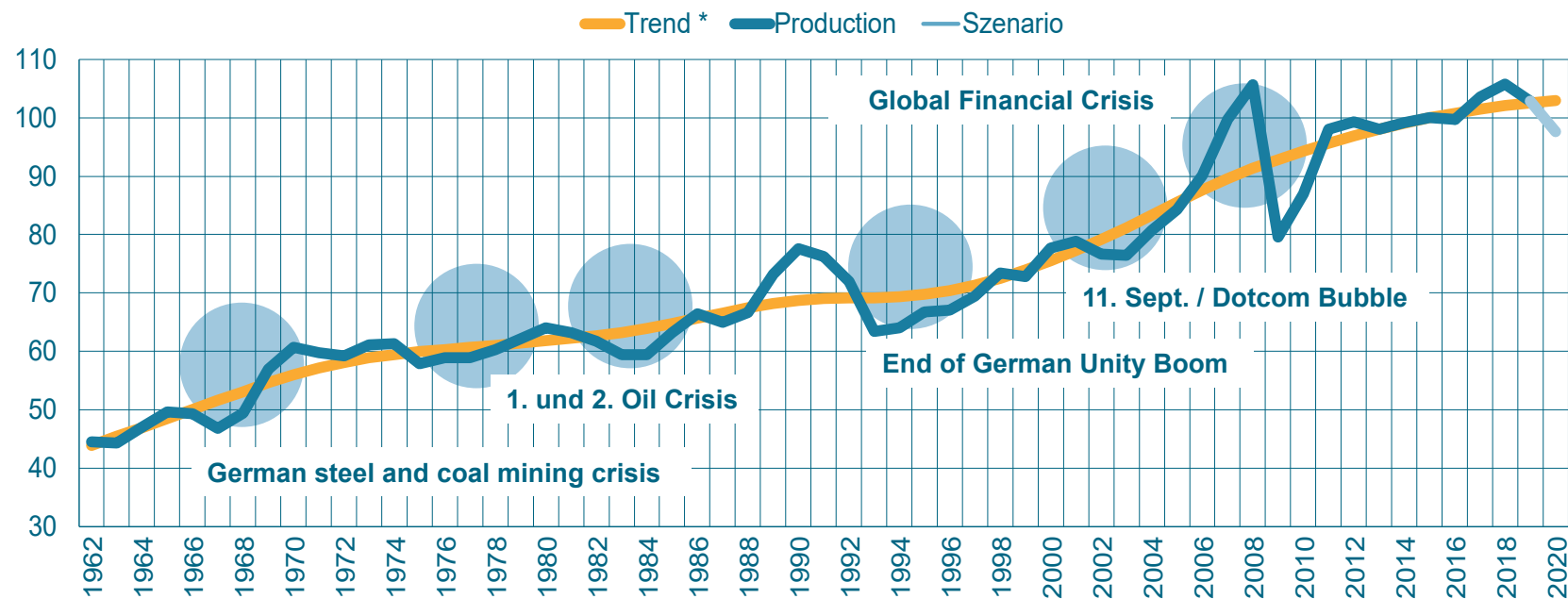
» Carpenters and Joiners:

- Almost all good to very good capacity utilisation and willing to invest

Difficult Times Ahead - Once Again!

German Machinery Production – Longterm Trend

Index, 2015=100



Source: Statistisches Bundesamt, VDMA

* Hodrick-Prescott Filter



Q&A?

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