A vertical rectangular image on the left side of the slide shows a single water droplet falling into a pool of blue water, creating concentric ripples. The background of the entire slide is a solid teal color.

Electronics – Mechanical Engineering

Market Outlook

productronica Main Press Conference
November 14, 2017, Munich

Rainer Kurtz

kurtz ersa

Advisory Board Chairman of
productronica

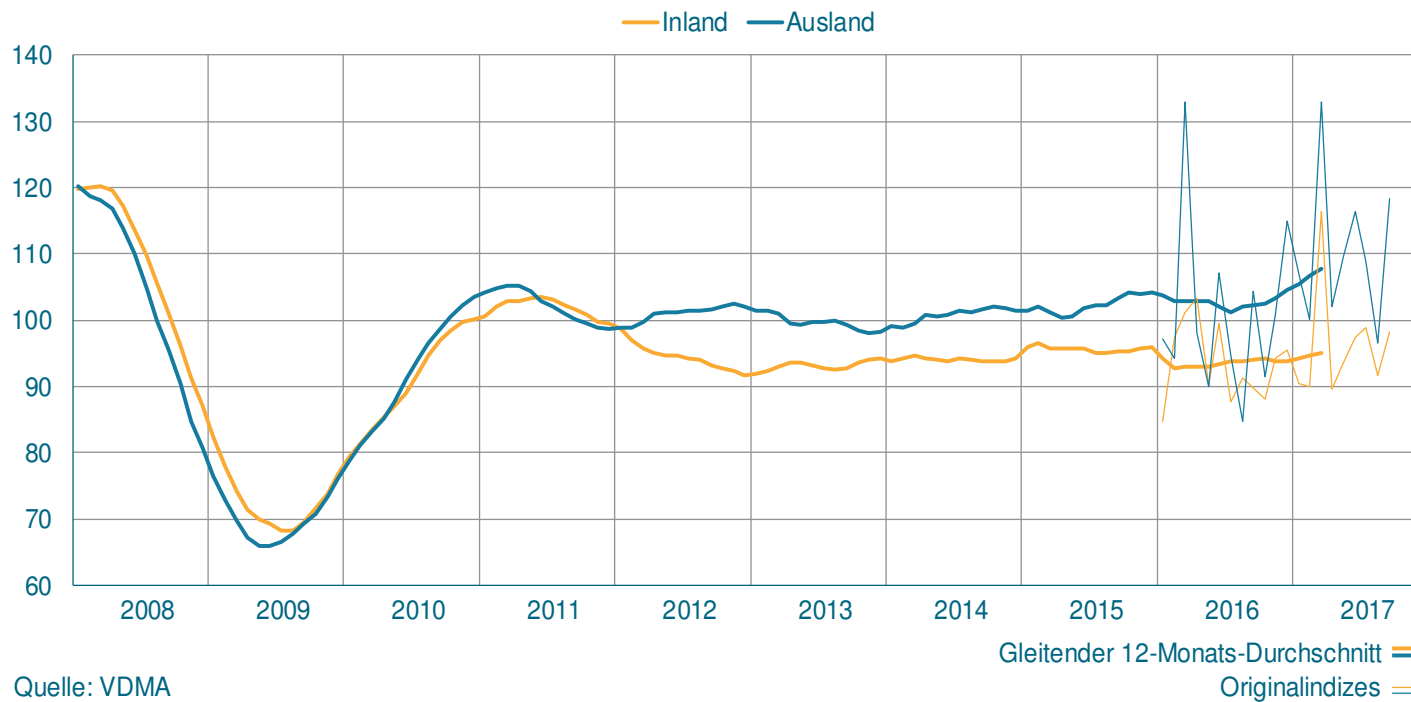
VDMA Productronic

German Engineering Federation (VDMA)

VDMA Statistics

Total incoming orders of German mechanical engineering companies

Preisbereinigte Indizes, Basis Umsatz 2015 = 100

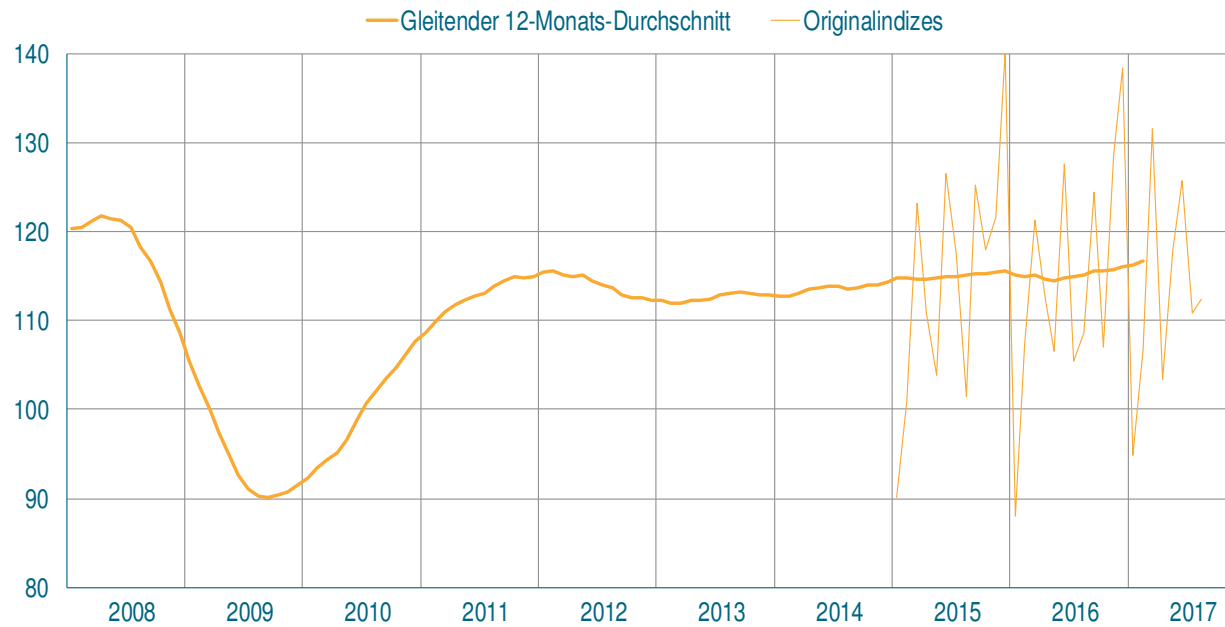


Quelle: VDMA

German Machine Production

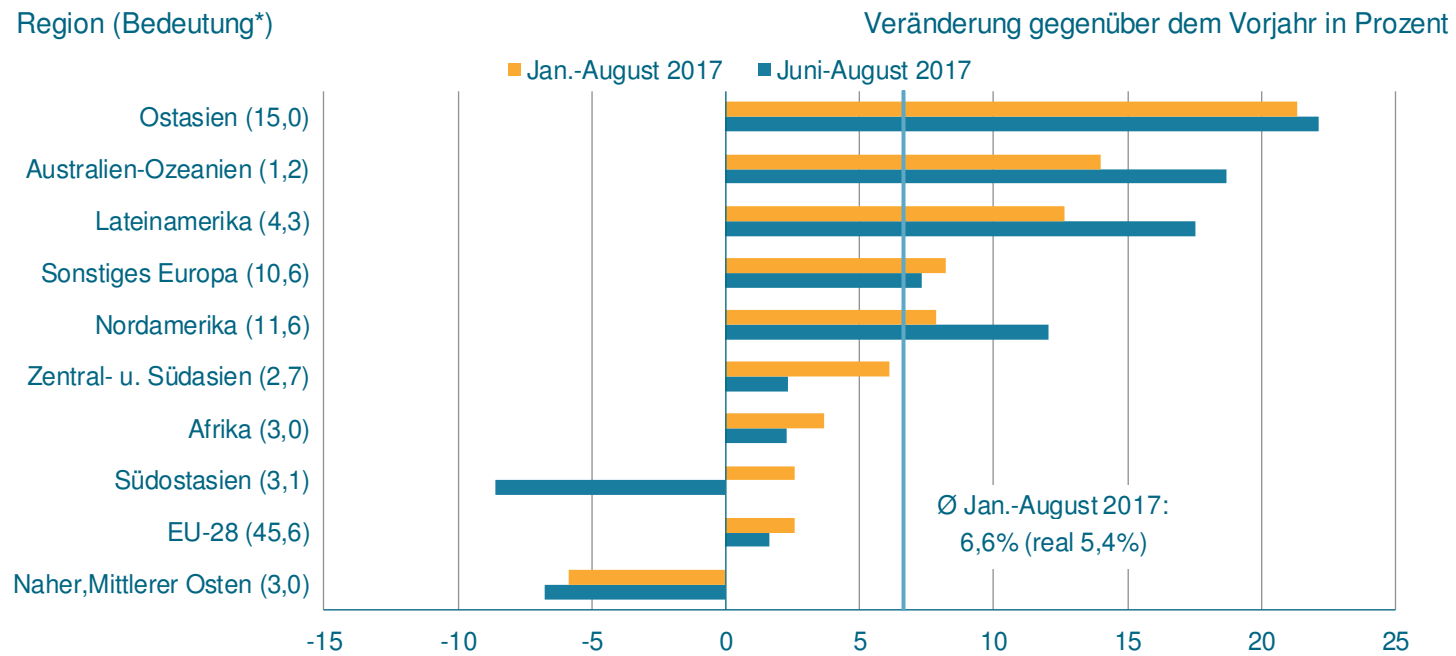


Preisbereinigter Index, Basis 2010 = 100



Quelle: Statistisches Bundesamt, VDMA

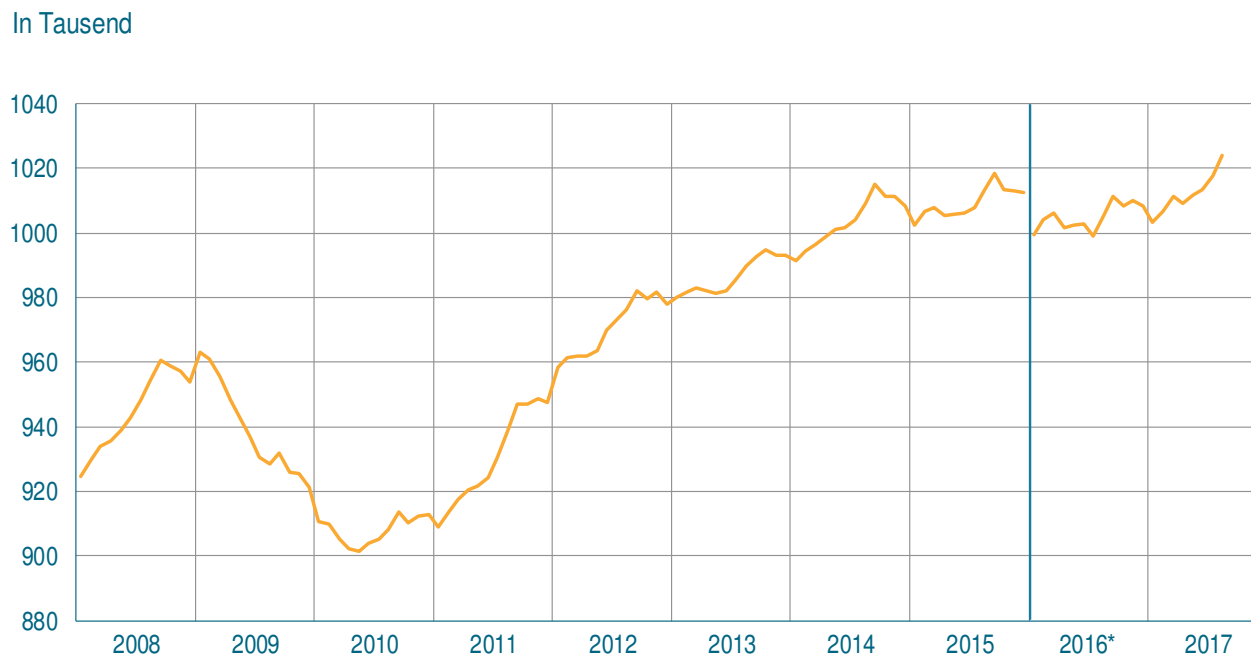
German machinery exports according to regions



Quelle: Statistisches Bundesamt, VDMA

*) Anteil an der gesamten deutschen Maschinenausfuhr in Prozent.

Employment figures in the German mechanical engineering sector

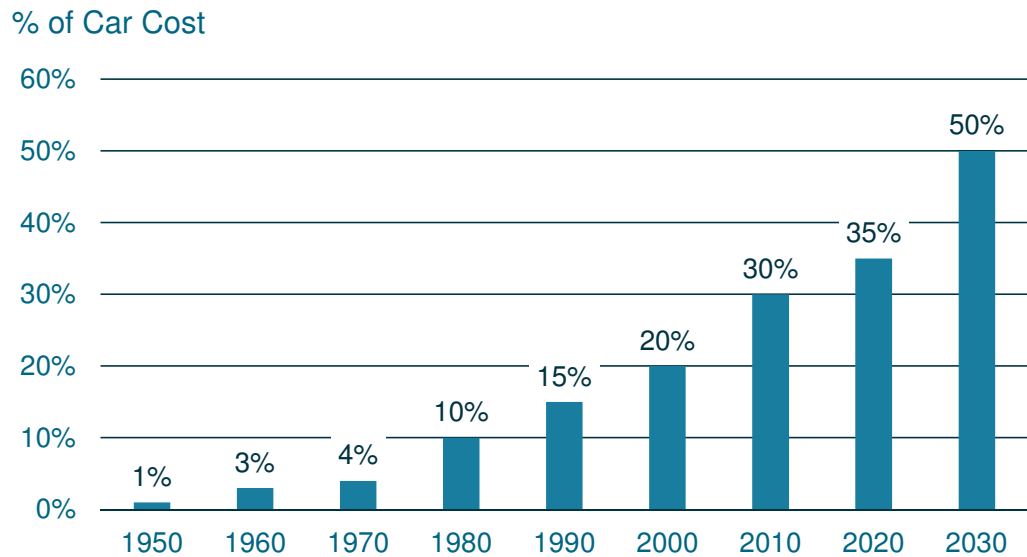


*) Wegen geänderter Zuordnung von fachlichen Betriebsteilen nicht mit Vorjahren vergleichbar.
Quelle: Statistisches Bundesamt, VDMA Beschäftigte in Betrieben ab 50 Mitarbeitern.

Customer Market for Automotive Electronics in Cars



Automotive Electronics Cost as % of Total Car Cost



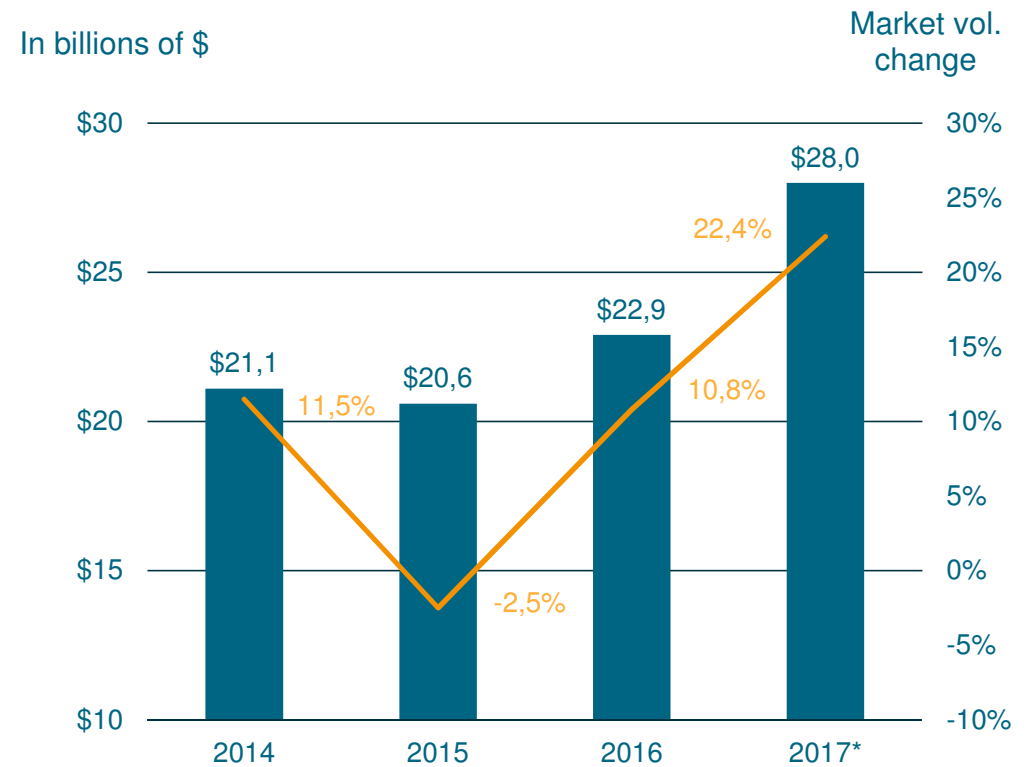
Milestones in automotive electronics:

1980: Electric fuel injection

2000: Airbag, ABS/ESP, body electronics

2010: Driver assistance systems, infotainment, security systems

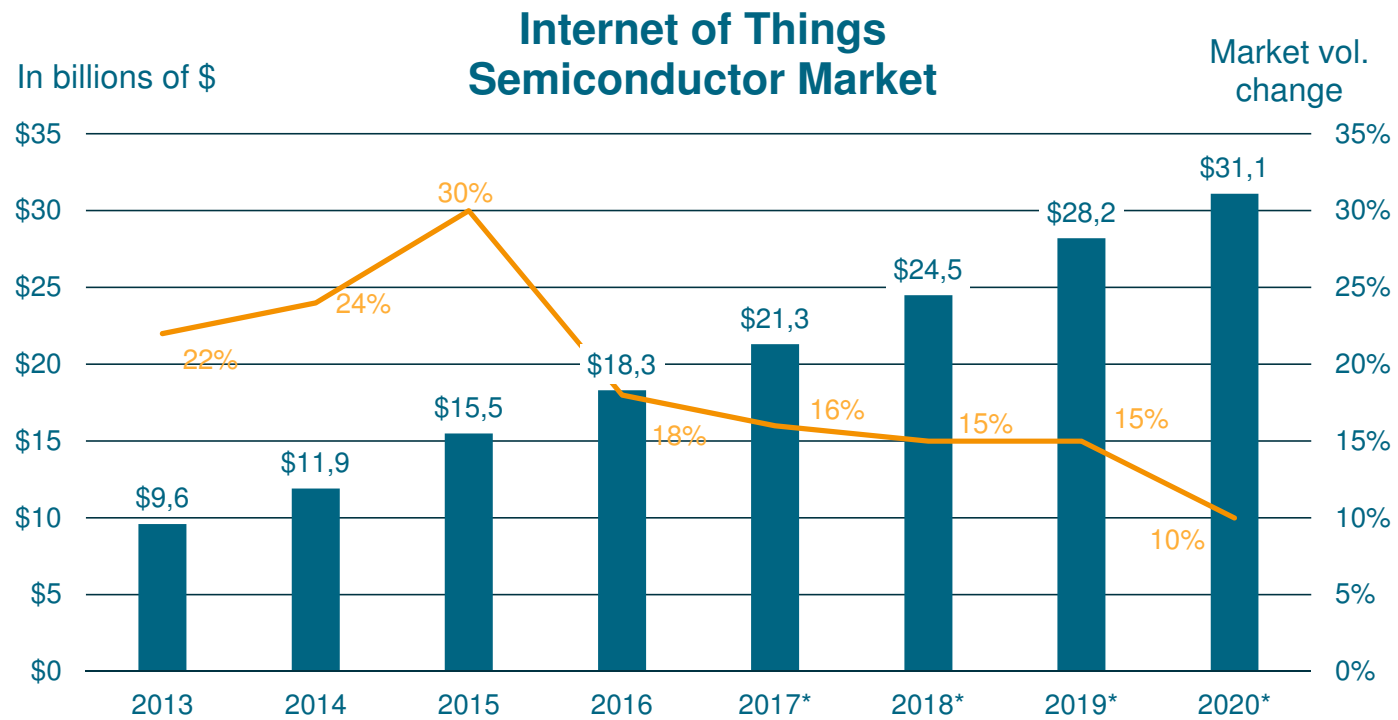
Automotive IC Market 2014 - 2017



* Forecast

Source: links: Statistica 9/2017, Freescales/NXP 6/17 in Custer 11-2017; Right: IC Insights 5/17 in Custer 11-2017

Customer Market for Digitalization of Production

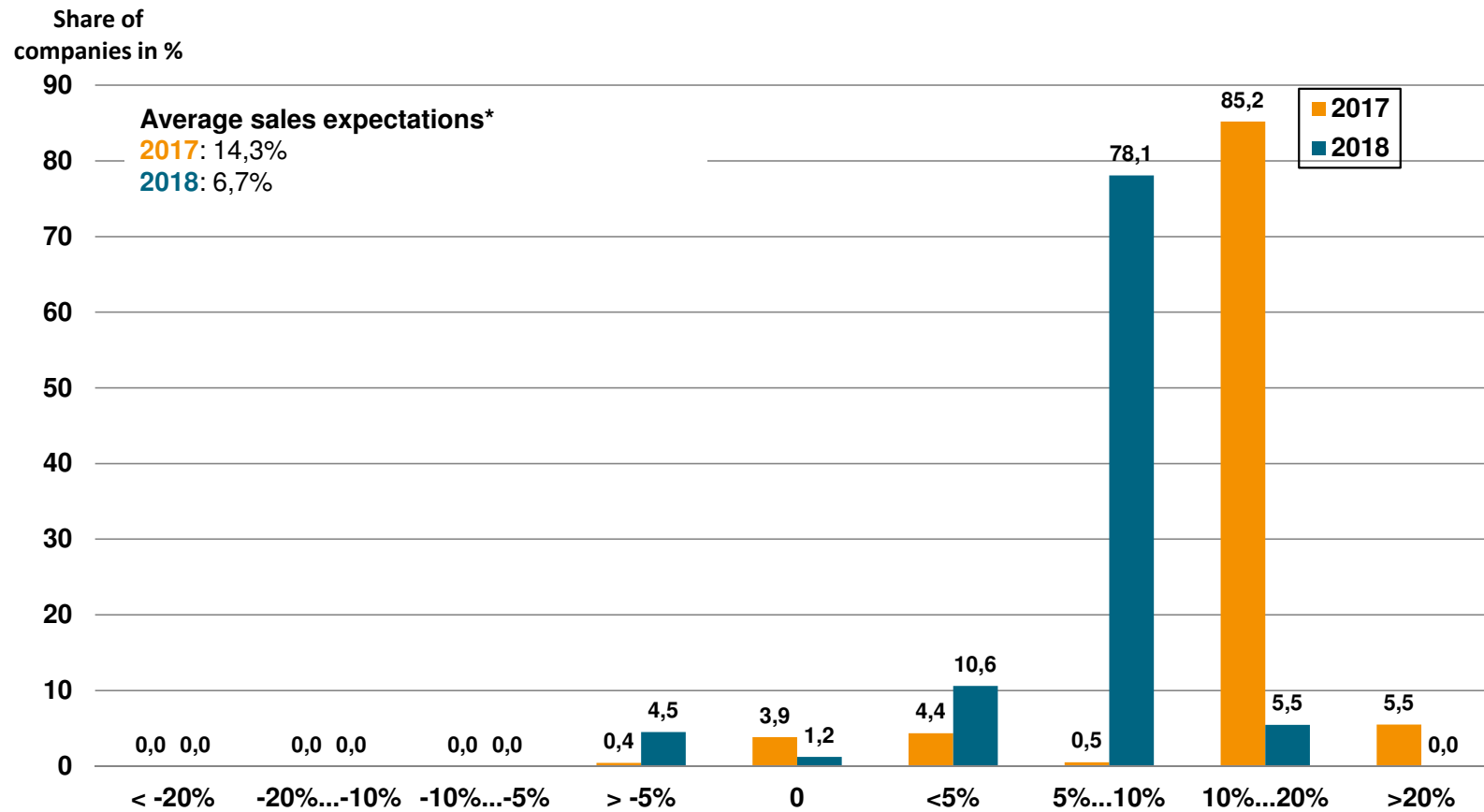


Source: IC Insights 6/17 in Custer 11-2017

* Forecast

Business Climate for Productronic in October 2017

Sales Expectations: 2017/2018 Comparison



Source: VDMA Productronic: answers weighted according to number of employees
 * Answers >20% are calculated with +30%

Business Climate for Productronic in October 2017



Capacity Utilization and Order Range

As a share of companies in %

Capacity Utilization



Source: VDMA Productronic: answers weighted according to number of employees

Business Climate for Productronic in October 2017



Employment Situation

Share of companies in %

Employment situation: Work time



Source: VDMA Productronic: answers weighted according to number of employees