The European Foundry Industry – Status Report

CEMAFON General Assembly

Maranello, 20 June 2013
World Casting Production 2011

Source: CAEF, moderncasting
World Casting Production - Leading Regions 2011

Source: CAEF, moderncasting, Germany, Italy and France as part of CAEF
World Casting Production - Leading Nations 2011

Source: CAEF, moderncasting
CAEF Castings 2012

Source: CAEF, Czech Rep. and Poland estimated
CAEF Iron- and Steel Castings 2012

Source: CAEF, Czech Rep. and Poland estimated

Schumacher, Status of the European Foundry Industry
CAEF Tons per Foundry Iron- and Steel Castings 2012

Source: CAEF

Schumacher, Status of the European Foundry Industry
CAEF TOP 10 Iron- and Steel Castings 2010-2012

Source: CAEF, Czech Rep. and Poland estimated

Schumacher, Status of the European Foundry Industry

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CAEF TOP 5 Iron- and Steel Castings 2010-2012

Source: CAEF

Schumacher, Status of the European Foundry Industry
CAEF TOP 5 Iron- and Steel Castings Tons/Empl. 2012

Source: CAEF, Germany foundries > 50 empl.

Schumacher, Status of the European Foundry Industry
CAEF TOP 5 Iron- and Steel Castings
Grey Cast Iron Production for Automotive 2012

Change in % against prev. year

<table>
<thead>
<tr>
<th>Country</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>-10.8</td>
</tr>
<tr>
<td>Italy</td>
<td>0.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>-17.0</td>
</tr>
<tr>
<td>France</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>-5.7</td>
</tr>
</tbody>
</table>

Source: CAEF, Spain not available

Schumacher, Status of the European Foundry Industry
CAEF TOP 5 Iron- and Steel Castings
Nodular Cast Iron Production for Automotive 2012

Change in % against prev. year

<table>
<thead>
<tr>
<th>Country</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>-13.4</td>
</tr>
<tr>
<td>Italy</td>
<td>4.2</td>
</tr>
<tr>
<td>Turkey</td>
<td>-19.7</td>
</tr>
<tr>
<td>France</td>
<td>-9.4</td>
</tr>
</tbody>
</table>

Source: CAEF, Spain not available

Schumacher, Status of the European Foundry Industry
CAEF TOP 5 Iron- and Steel Castings
Grey Cast Iron Production for Engineering 2012

Change in % against prev. year

- Spain
- Italy
- Turkey
- France
- Germany

Source: CAEF, Spain not available
CAEF TOP 5 Iron- and Steel Castings
Nodular Cast Iron Production for Engineering 2012

Change in % against prev. year

<table>
<thead>
<tr>
<th>Country</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>-7.1</td>
</tr>
<tr>
<td>Italy</td>
<td>-12.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>-6.0</td>
</tr>
<tr>
<td>France</td>
<td>0.4</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
</tr>
</tbody>
</table>

Source: CAEF, Spain not available

Schumacher, Status of the European Foundry Industry
CAEF TOP 5 Iron- and Steel Castings
Steel Castings Production for Engineering 2012

Change in % against prev. year

Spain | Italy | Turkey | France | Germany

-10,0 | -6,0 | 4,3

Source: CAEF, Spain and Italy not available
CAEF Non-Ferrous Castings 2012

Source: CAEF, Czech Rep. and Poland estimated
CAEF Tons per Foundry Non-Ferrous Castings 2012

Source: CAEF
CAEF TOP 10 Non-Ferrous Castings 2010-2012

Source: CAEF, Czech Rep. and Poland estimated

Schumacher, Status of the European Foundry Industry
CAEF TOP 5 Non-Ferrous Castings 2010-2012

Source: CAEF, Poland estimated
CAEF TOP 5 Non-Ferrous Castings Tons/Empl. 2012

Source: CAEF, Poland not available, Germany foundries > 50 empl.
CAEF TOP 5 Non-Ferrous Castings 2011-2012

Change in % against prev. year

<table>
<thead>
<tr>
<th>Country</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>14.4%</td>
<td>8.5%</td>
</tr>
<tr>
<td>Poland</td>
<td>6.0%</td>
<td>-6.5%</td>
</tr>
<tr>
<td>France</td>
<td>11.8%</td>
<td>-2.6%</td>
</tr>
<tr>
<td>Italy</td>
<td>12.7%</td>
<td>-13.7%</td>
</tr>
<tr>
<td>Germany</td>
<td>3.8%</td>
<td>-4.8%</td>
</tr>
</tbody>
</table>

Source: CAEF, Poland estimated
CAEF Aluminium Castings 2012

Source: CAEF, Czech Rep. and Poland estimated

Schumacher, Status of the European Foundry Industry
FISI – European Foundry Industry Sentiment Indicator (ferrous) May 2013 new 2010=100

Source CAEF, Index 2010 = 100

Schumacher, Status of the European Foundry Industry
FISI – European Foundry Industry Sentiment Indicator (non-ferrous) May 2013 new 2010=100

Source: CAEF, Index May 2010 = 100

Schumacher, Status of the European Foundry Industry
Castings 2020 vs Reality 2012
Regional Developments in Demand for Foundry Products

Reality 2012:
CAEF 16,1 %
BRIC 57,9 %

Source: Castings 2020
Thank you for your attention!