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ISTMA
BUSINESS CONDITIONS REPORT
For six-month period ending
December 31st, 2021

Results Compiled By:
ISTMA – World Secretariat
February 21st, 2022



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INTERNATIONAL SPECIAL TOOLING AND MACHINING ASSOCIATION

Data provided by the members:



Brazil
ABINFER



Canada
CTMA



Czech Republic
SVAZ NASTROJAREN



Estonia
ESTA



Finland
Finnish Special Tools



Germany
VDMA



Italy
UCISAP



Japan
JaDMA



Mexico
AMMMT



Portugal
CEFAMOL



Slovenia
TECOS



South Africa
PtSA



Sweden
SINF



Switzerland
SWISSMEM



Turkey
UKUB



United Kingdom
GTMA

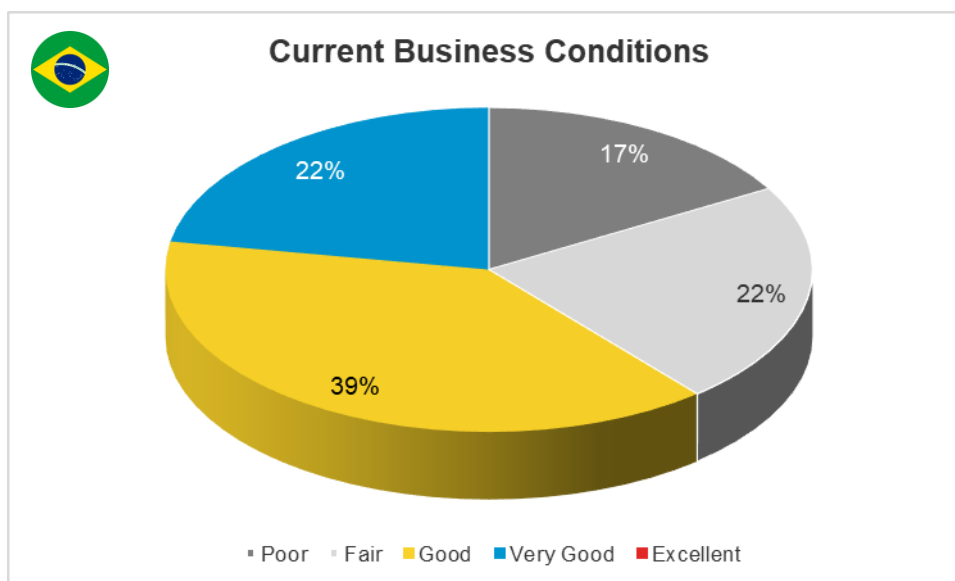


BRAZIL

MOULDMAKERS + DIEMAKERS

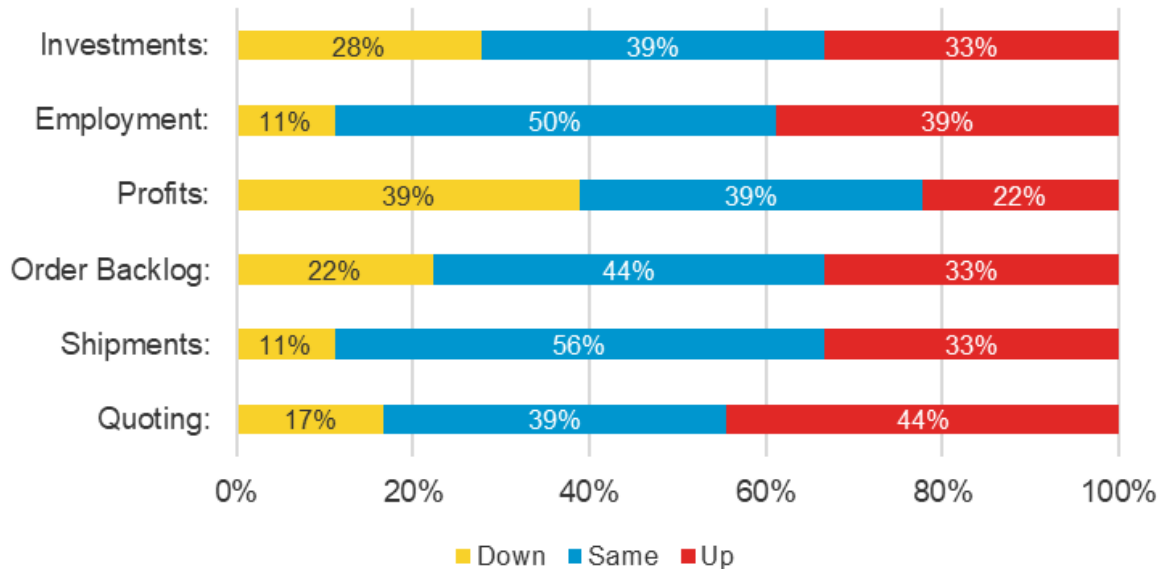
(18 SURVEY RESPONSES)

Average of Skilled Employees	36
Current Average Work Week Per Skilled Employee	42
Future Work Currently on Order Books (average):	+12 weeks
Company Activity:	
Large > 10 Tones	39%
Small / Medium < 10 Tones	56%
Did not answer	5%

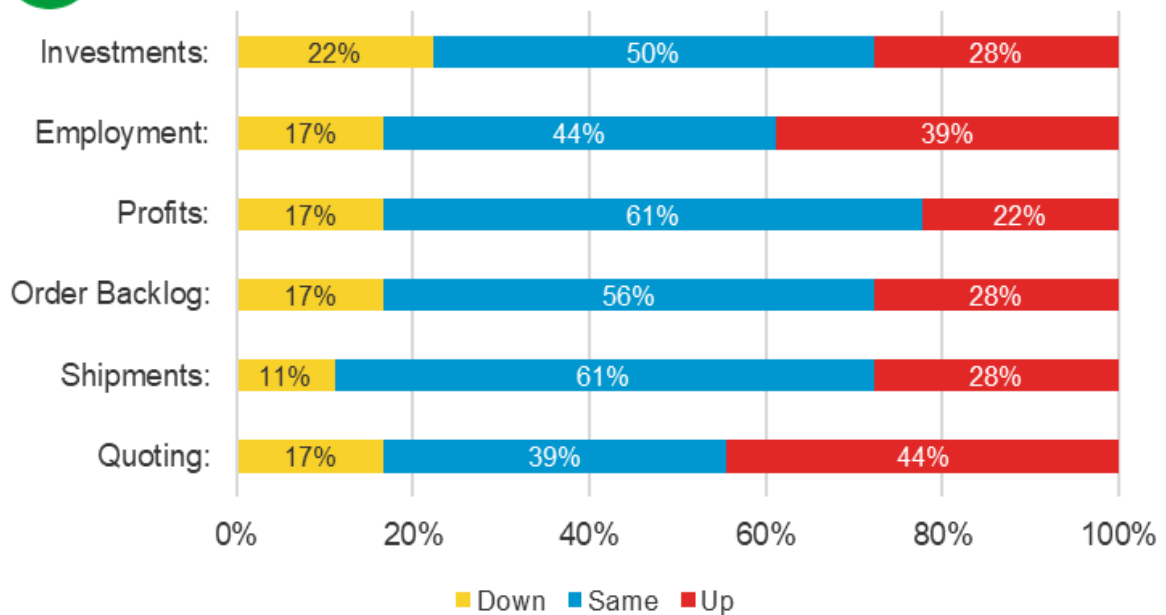




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



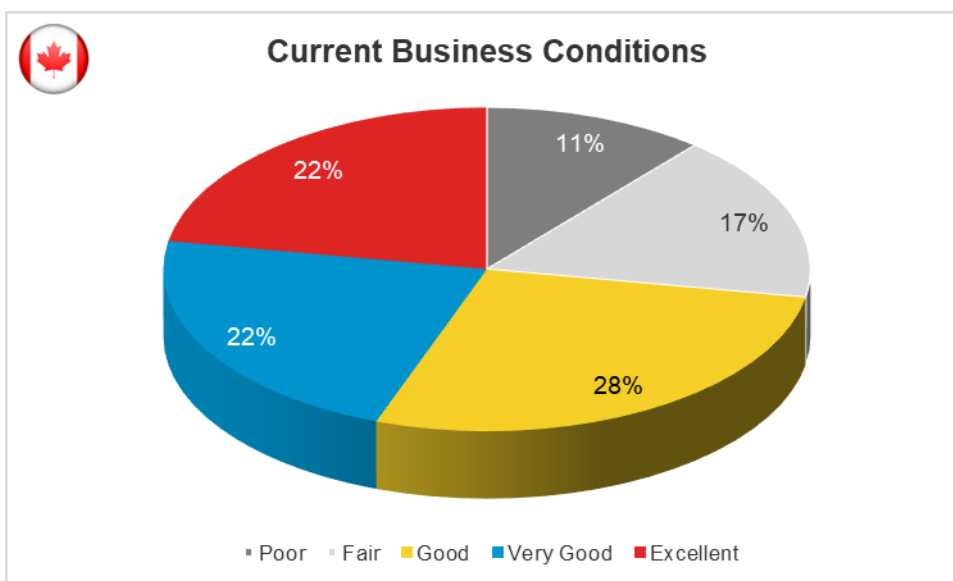


CANADA

MOULDMAKERS + DIEMAKERS + PRECISION MACHINING

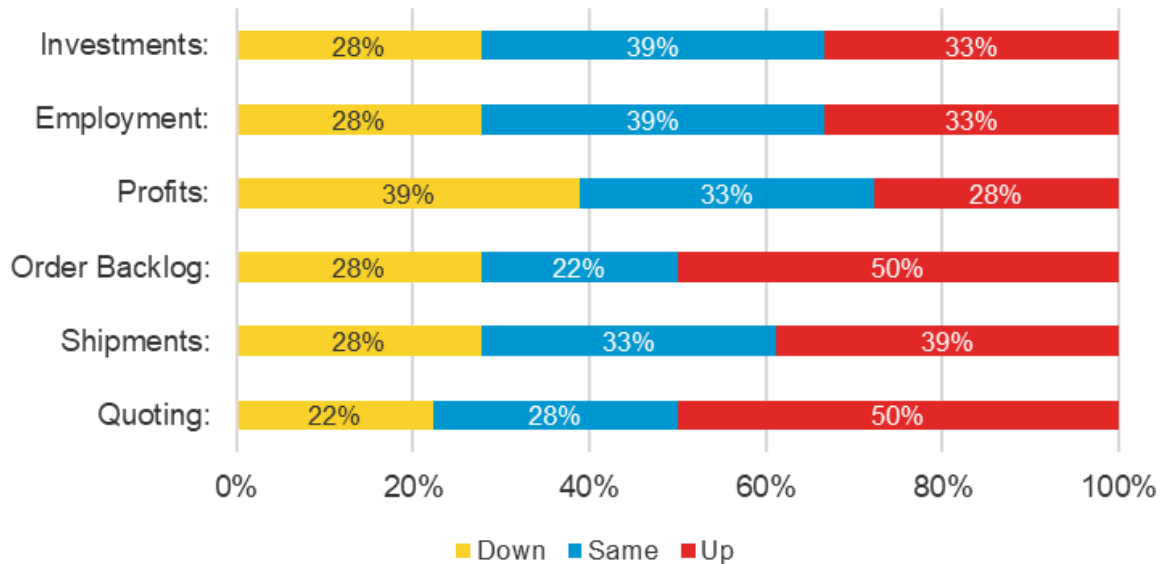
(18 SURVEY RESPONSES)

Average of Skilled Employees	58
Current Average Work Week Per Skilled Employee	43
Future Work Currently on Order Books (average):	+12 weeks
Company Activity:	
Large > 10 Tones	50%
Small / Medium < 10 Tones	50%
Did not answer	

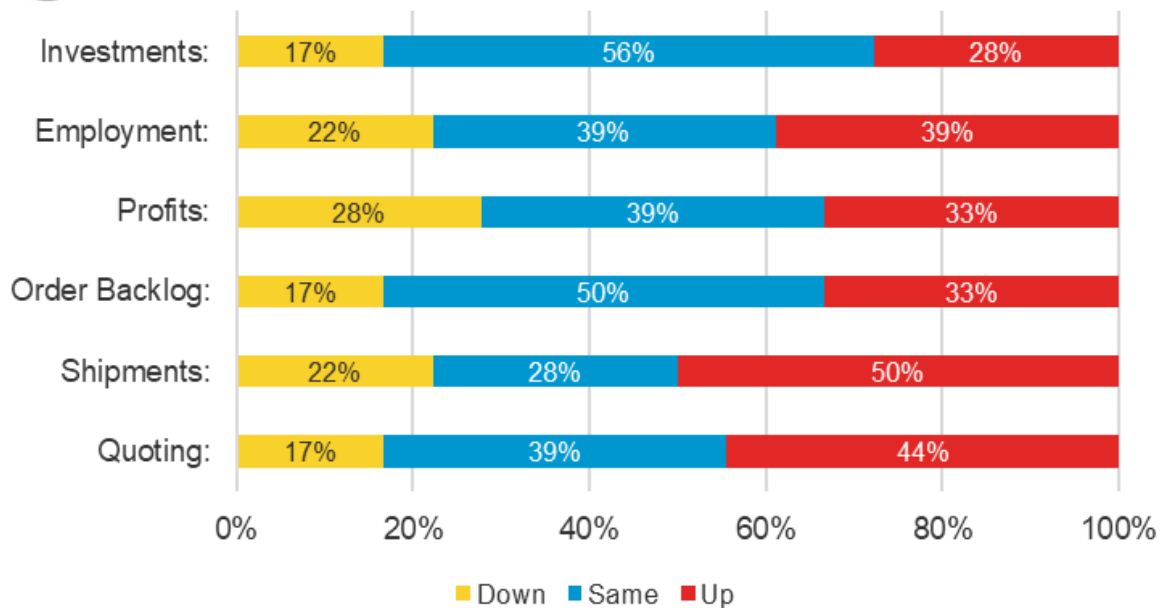




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



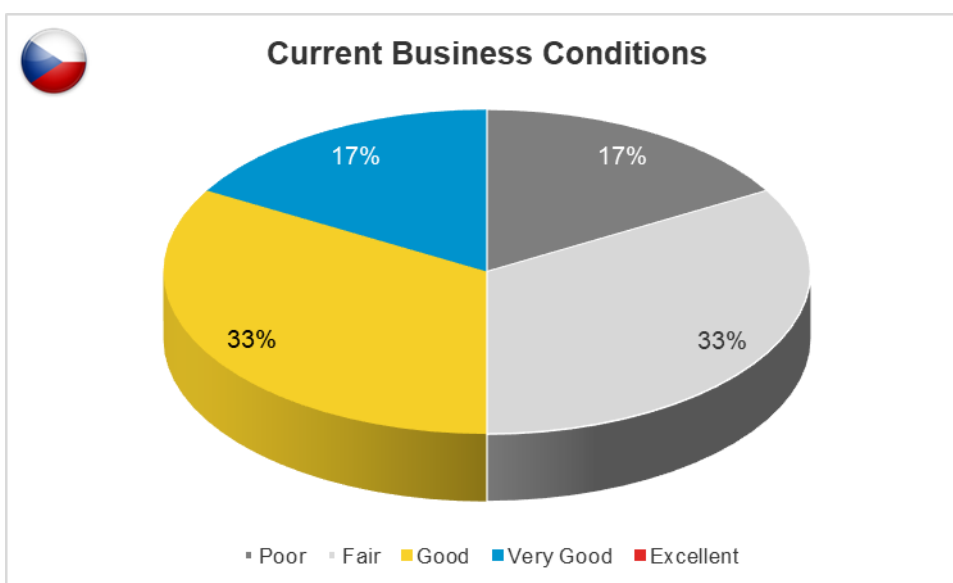


CZECH REPUBLIC

MOULDMAKERS + DIEMAKERS + PRECISION MACHINING

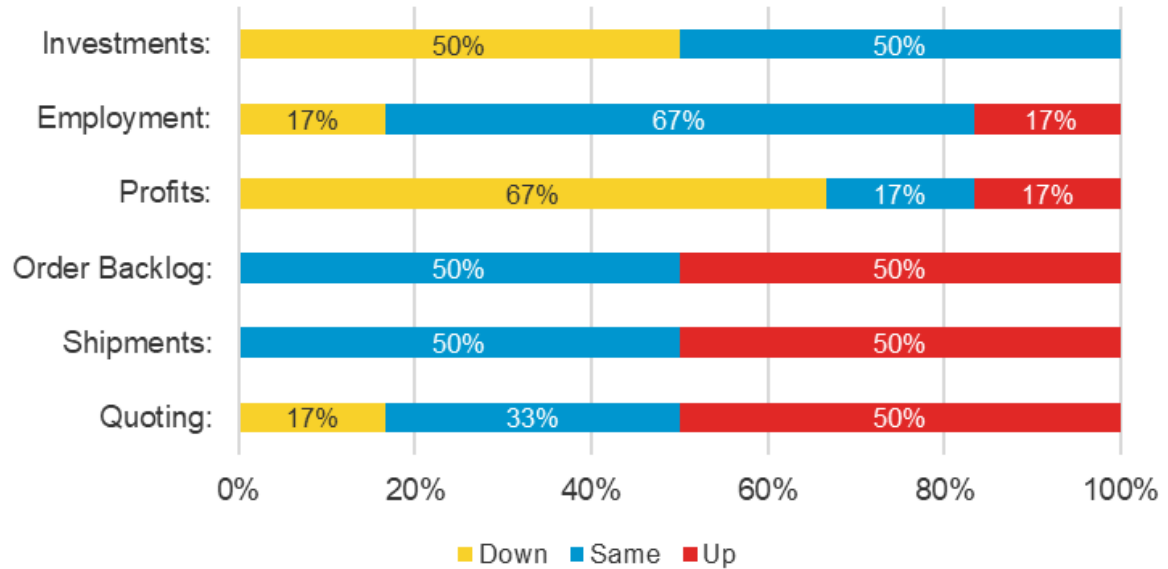
(6 SURVEY RESPONSES)

Average of Skilled Employees	275
8Current Average Work Week Per Skilled Employee	38
Future Work Currently on Order Books (average):	+12 weeks
Company Activity:	
Large > 10 Tones	67%
Small / Medium < 10 Tones	17%
Did not answer	16%

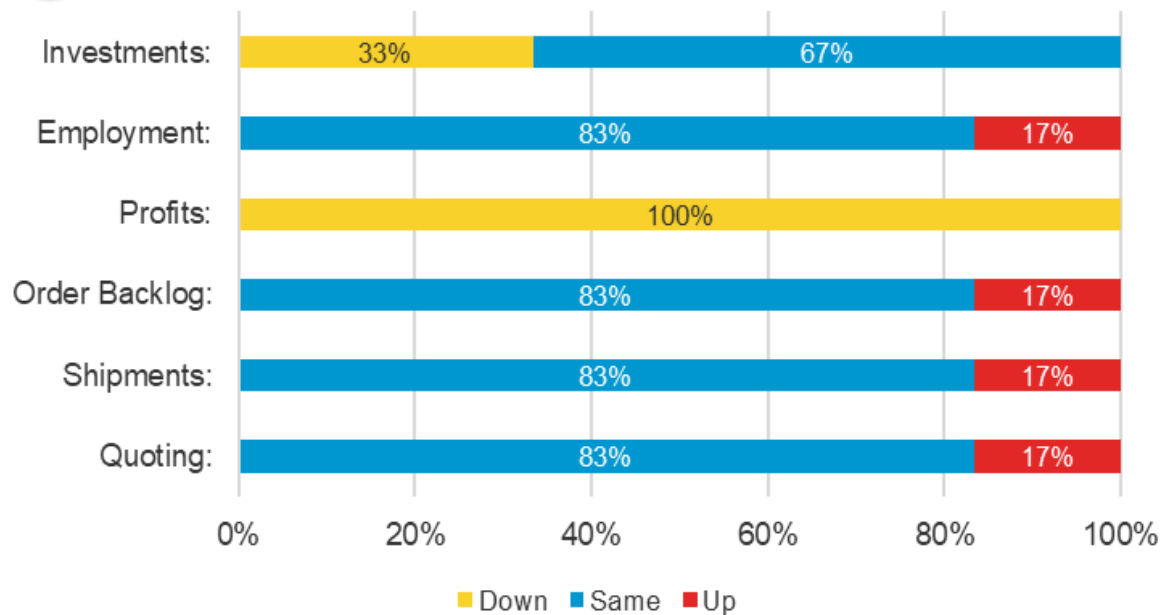




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



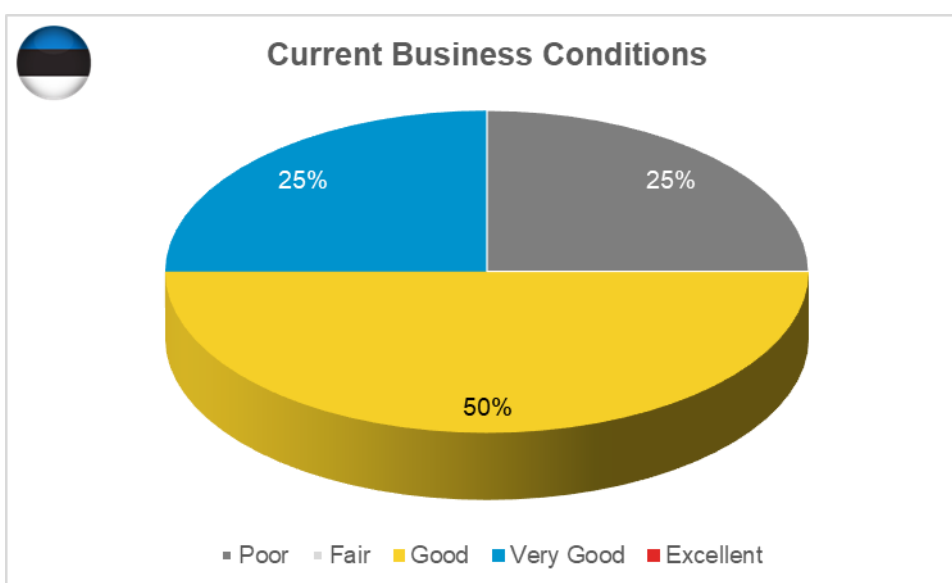


ESTONIA

MOULDMAKERS

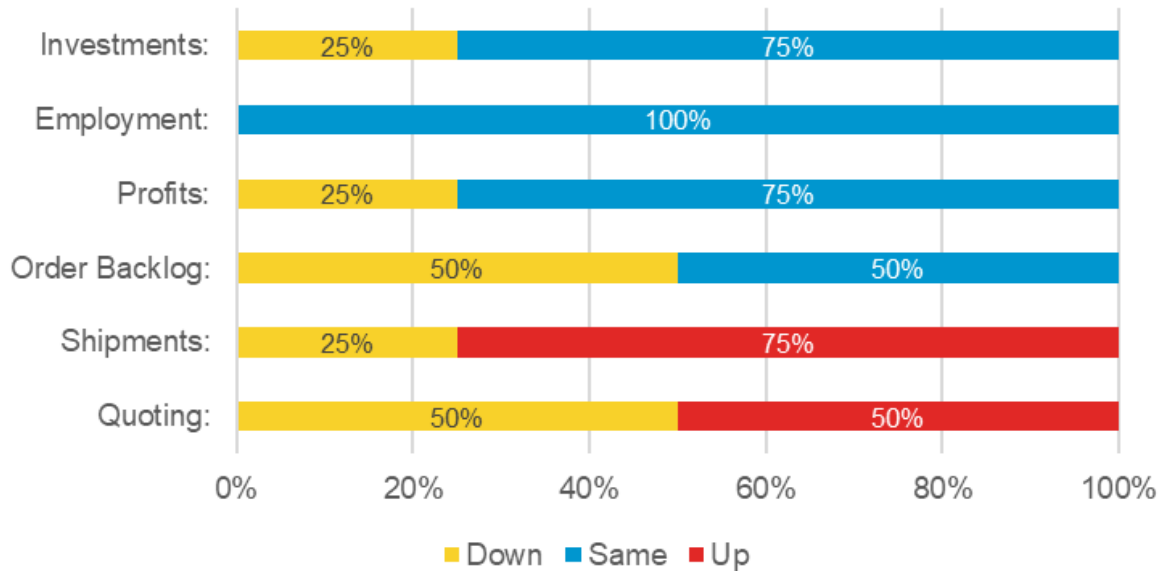
(4 SURVEY RESPONSES)

Average of Skilled Employees	20
Current Average Work Week Per Skilled Employee	40
Future Work Currently on Order Books (average):	+12 weeks
Company Activity:	
Large > 10 Tones	0%
Small / Medium < 10 Tones	100%
Did not answer	

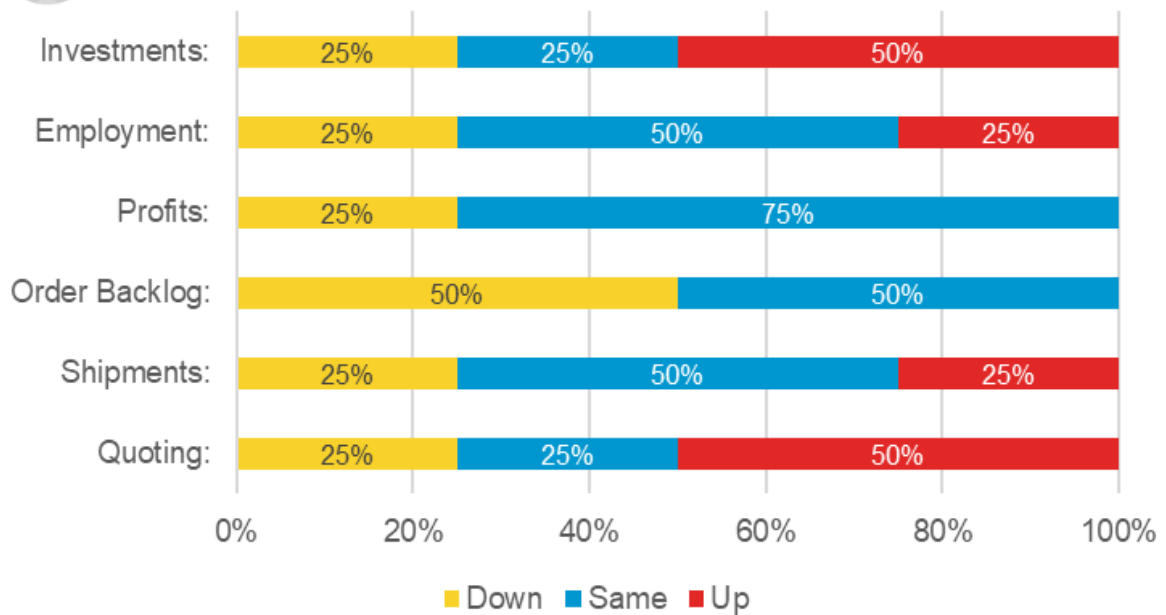




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



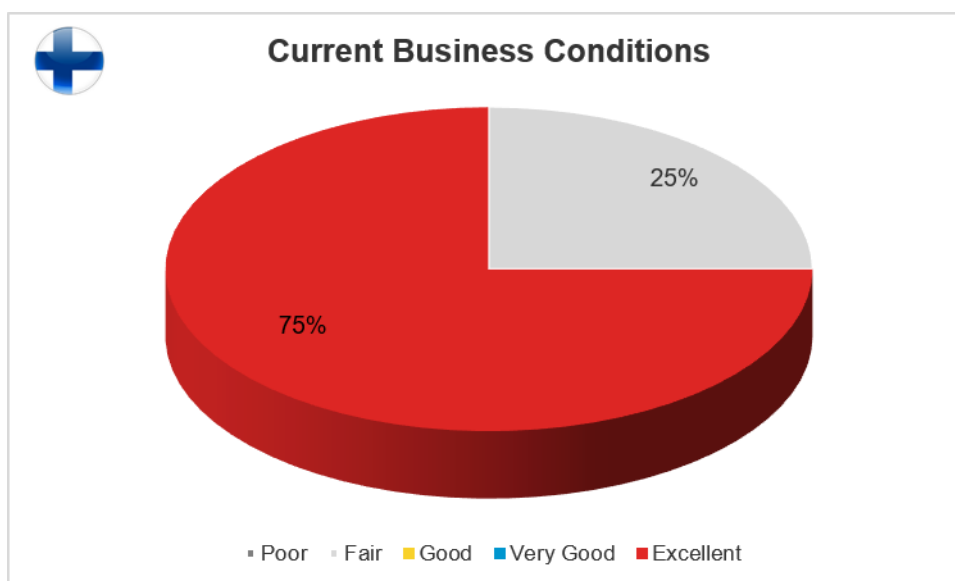


FINLAND

MOULDMAKERS + PRECISION MACHINING

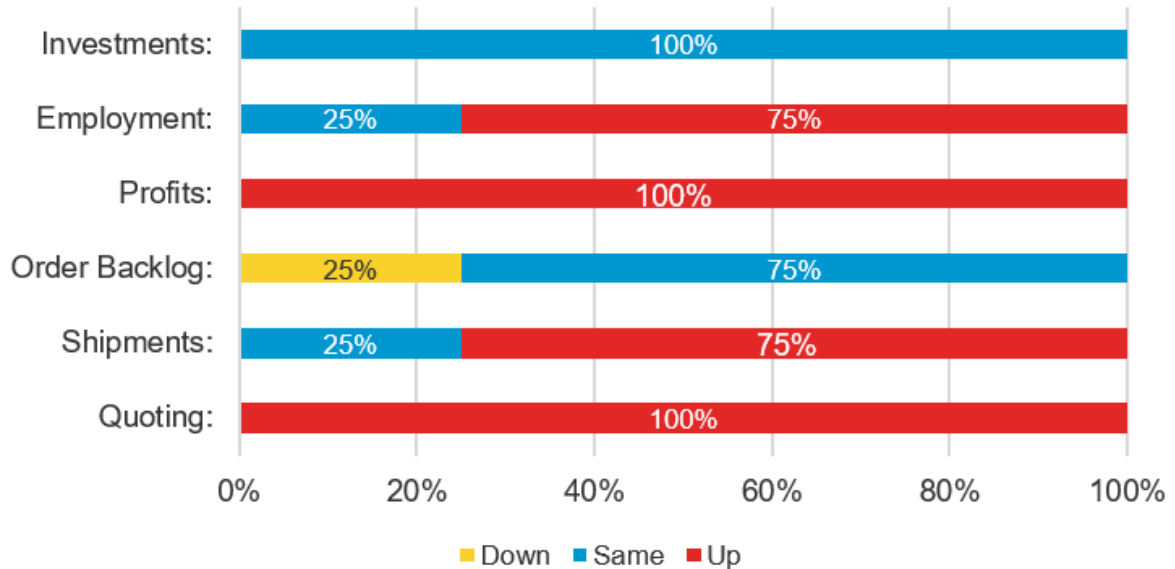
(4 SURVEY RESPONSES)

Average of Skilled Employees	42
Current Average Work Week Per Skilled Employee	40
Future Work Currently on Order Books (average):	5-8 weeks
Company Activity:	
Large > 10 Tones	0%
Small / Medium < 10 Tones	100%
Did not answer	

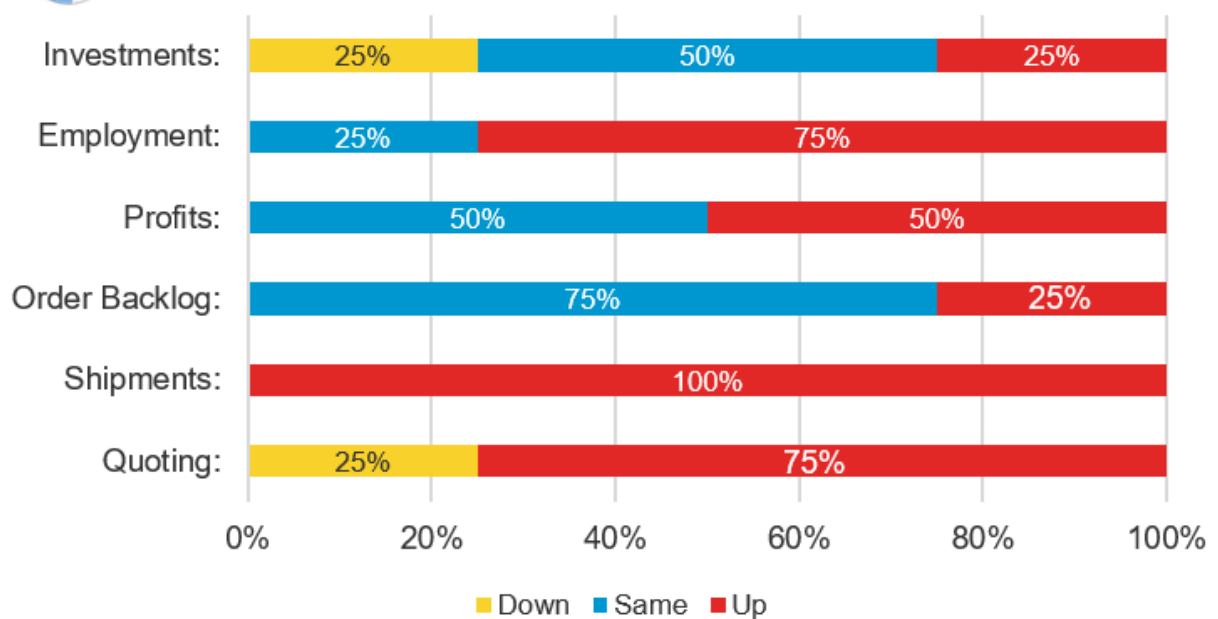




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



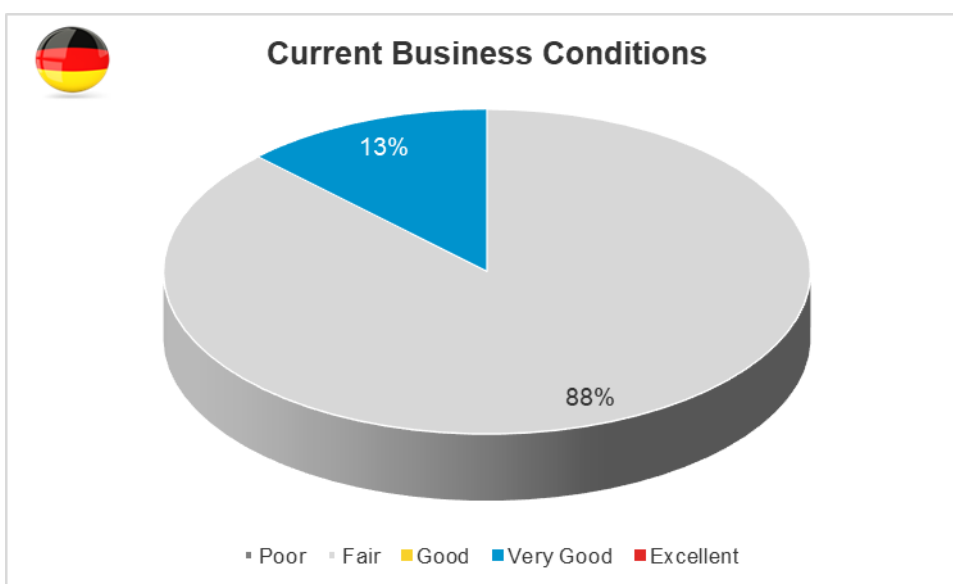


GERMANY

MOULDMAKERS + DIEMAKERS

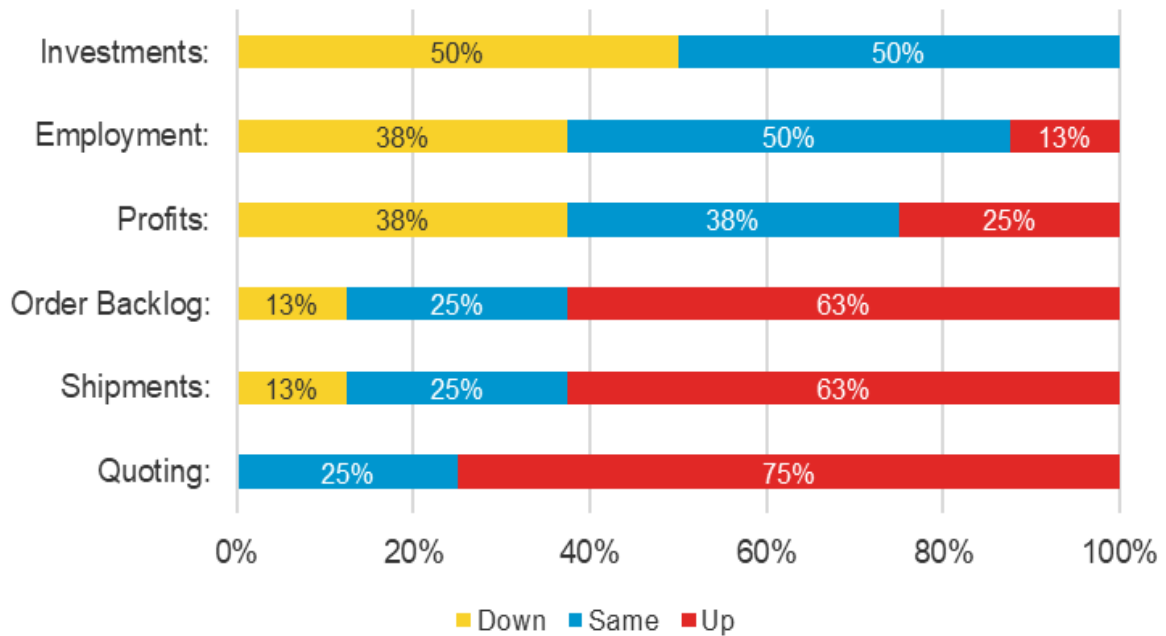
(8 SURVEY RESPONSES)

Average of Skilled Employees	179
Current Average Work Week Per Skilled Employee	38
Future Work Currently on Order Books (average):	9-12 weeks
Company Activity:	
Large > 10 Tones	37%
Small / Medium < 10 Tones	63%
Did not answer	

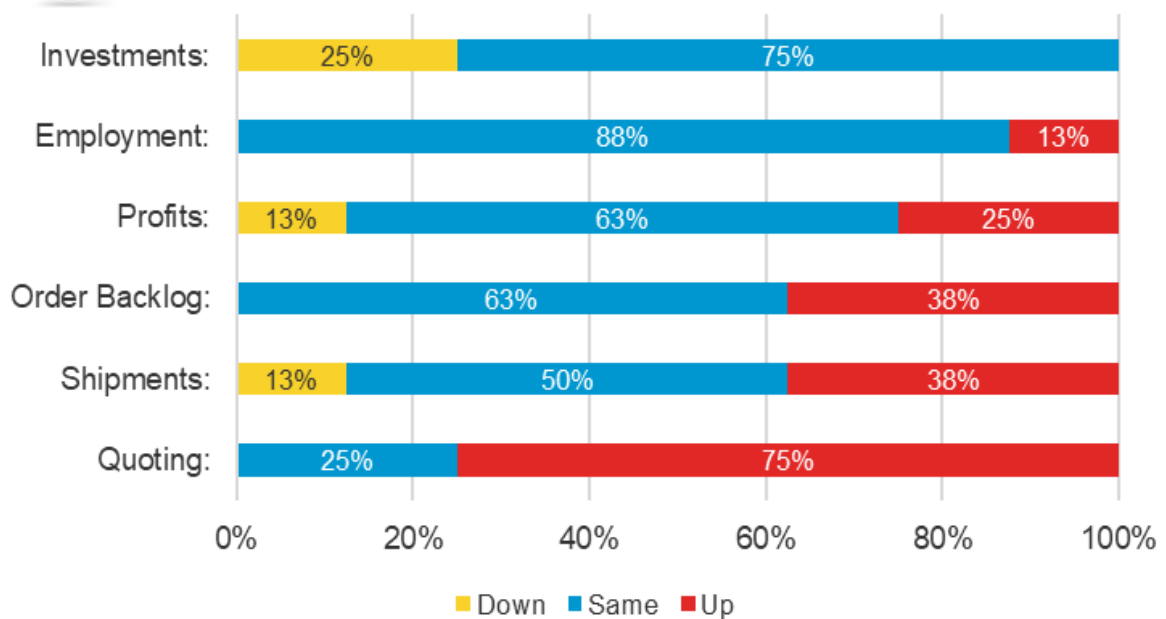




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



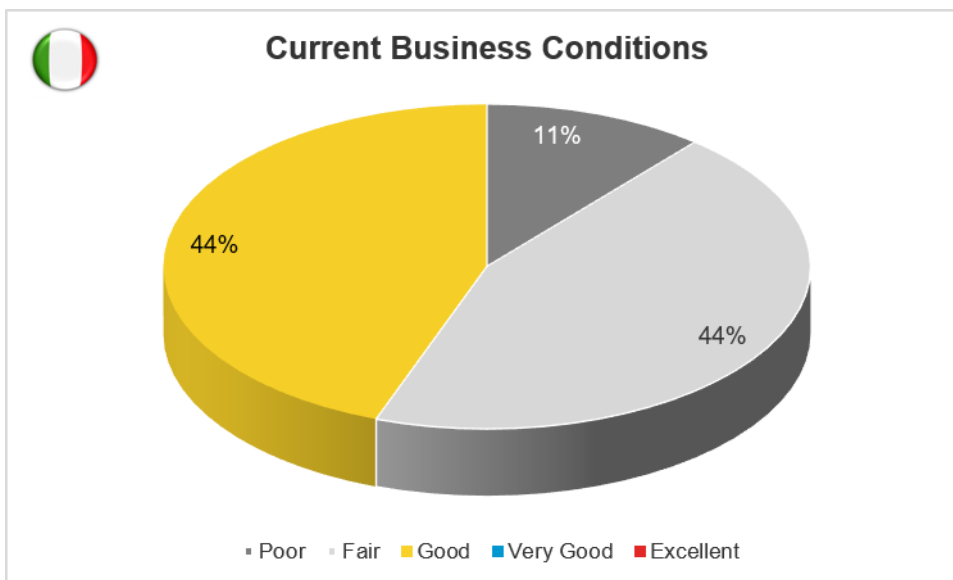


ITALY

MOULDMAKERS + DIEMAKERS

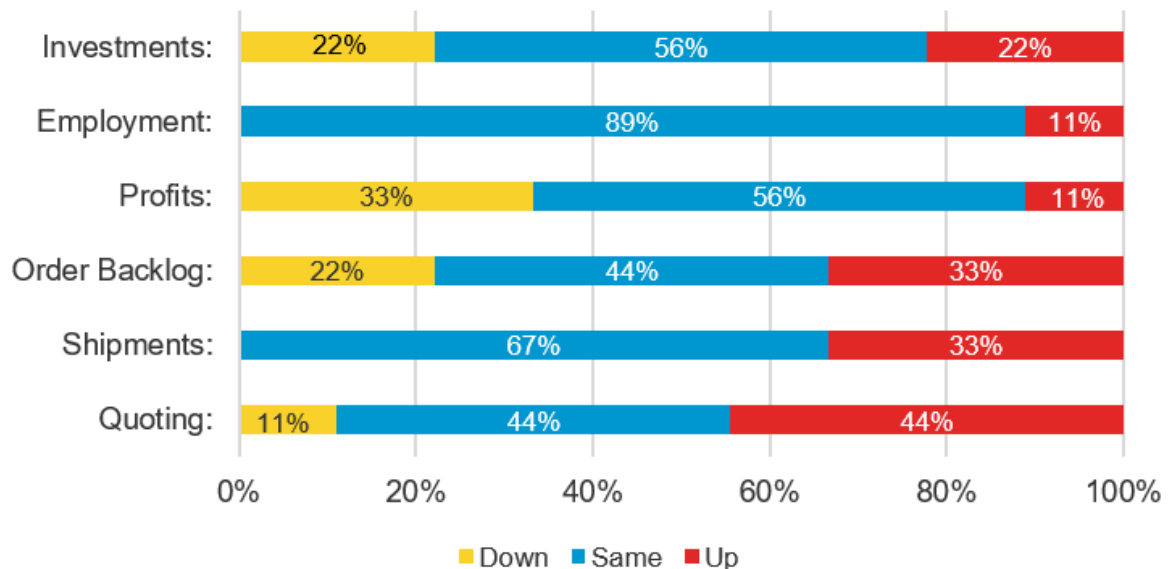
(9 SURVEY RESPONSES)

Average of Skilled Employees	19
Current Average Work Week Per Skilled Employee	29
Future Work Currently on Order Books (average):	9-12 weeks
Company Activity:	
Large > 10 Tones	22%
Small / Medium < 10 Tones	78%
Did not answer	

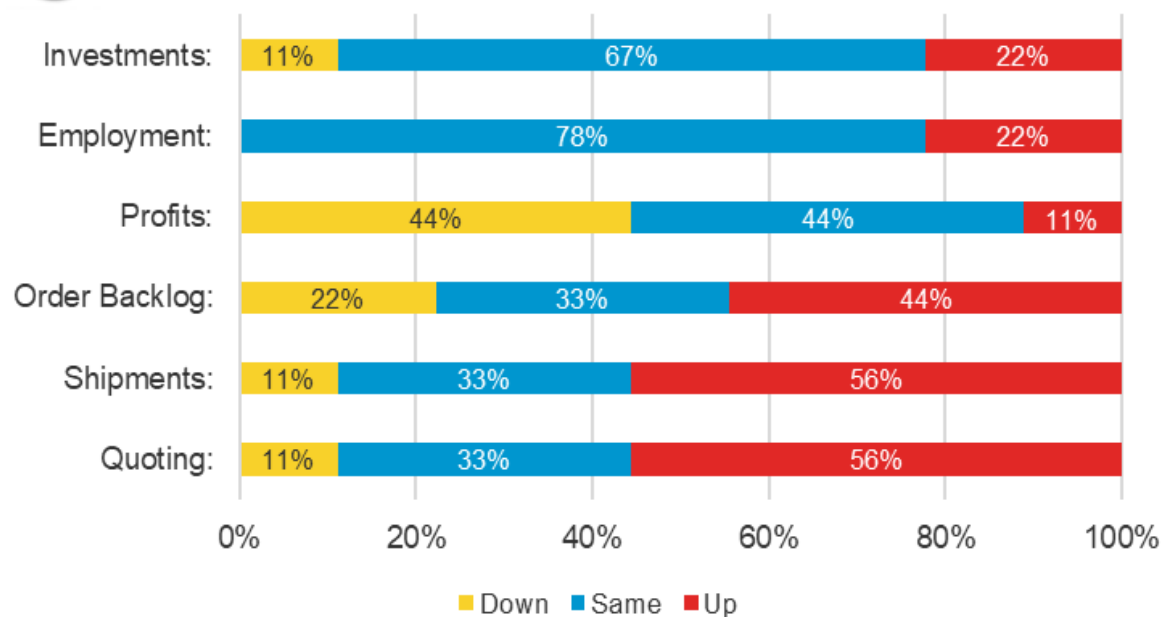




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



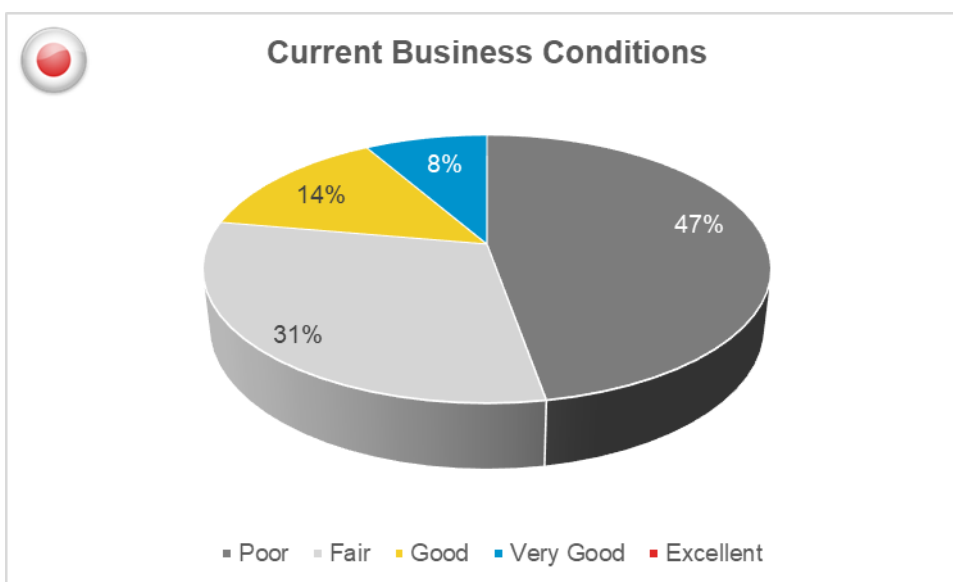


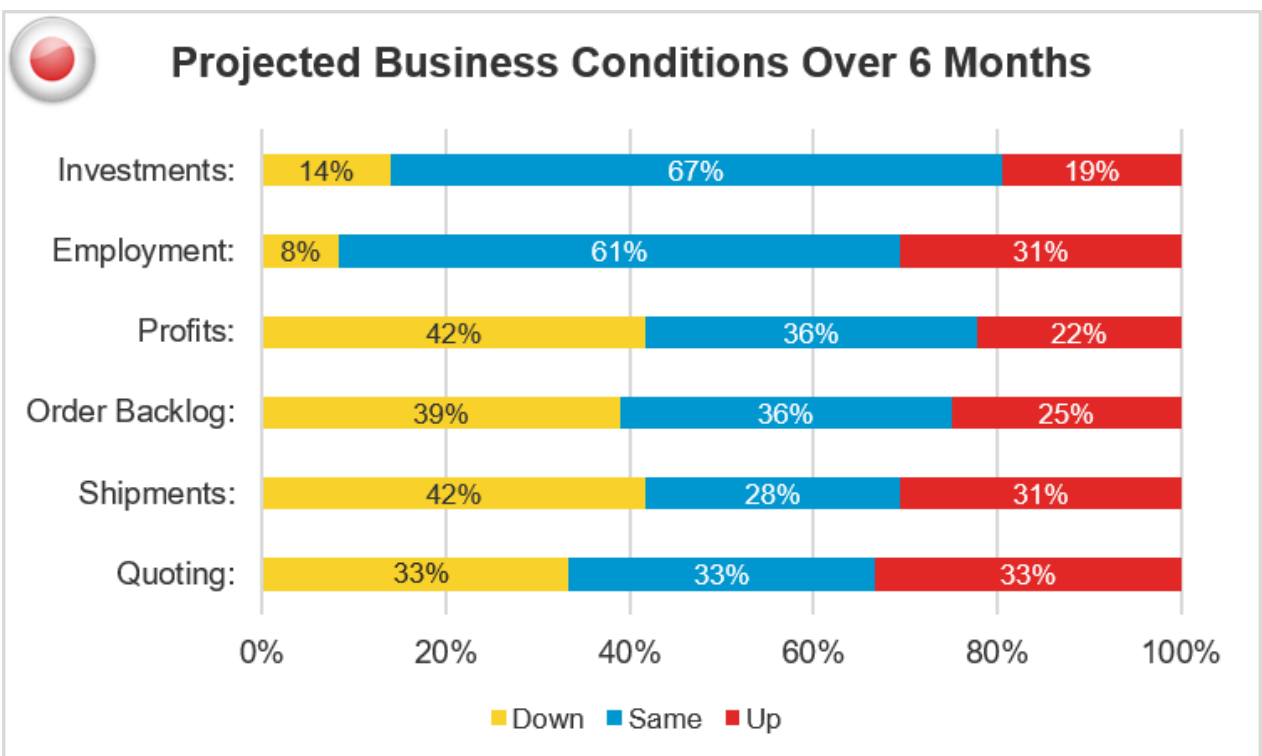
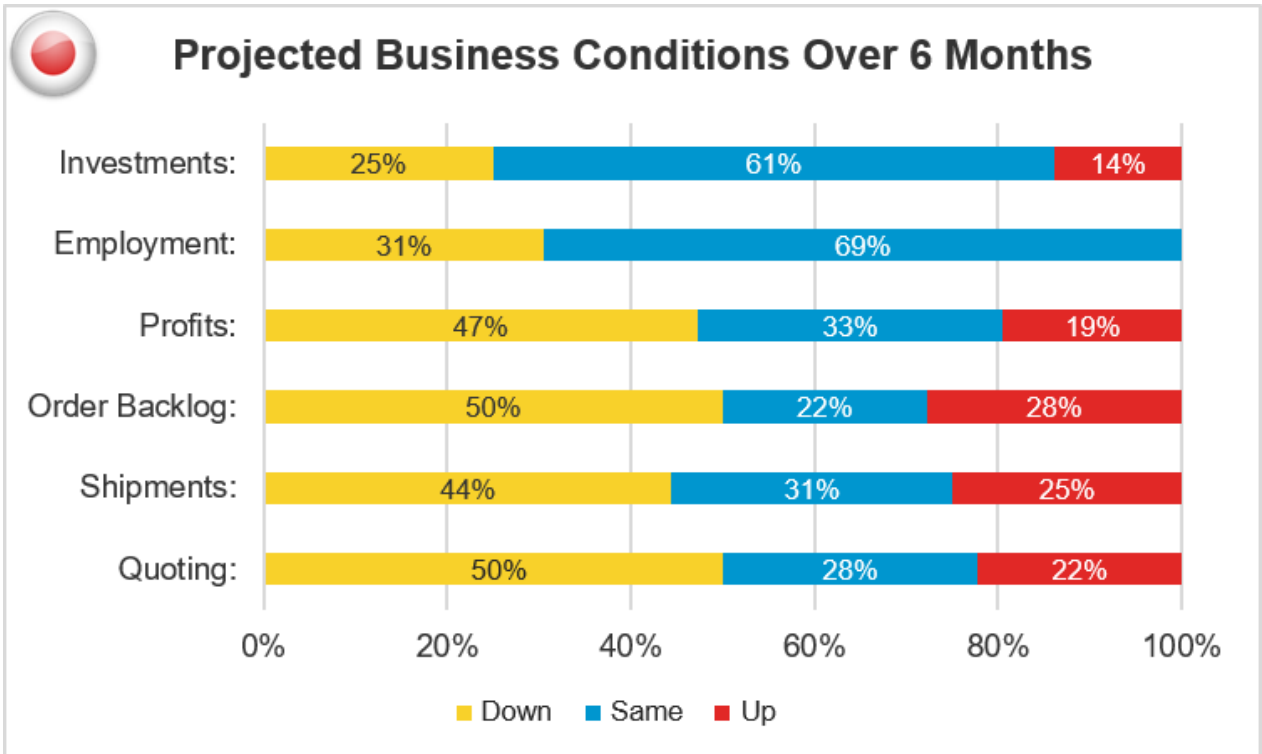
JAPAN

MOULDMAKERS + DIEMAKERS

(36 SURVEY RESPONSES)

Average of Skilled Employees	103
Current Average Work Week Per Skilled Employee	44
Future Work Currently on Order Books (average):	5-8 weeks
Company Activity:	
Large > 10 Tones	50%
Small / Medium < 10 Tones	50%
Did not answer	





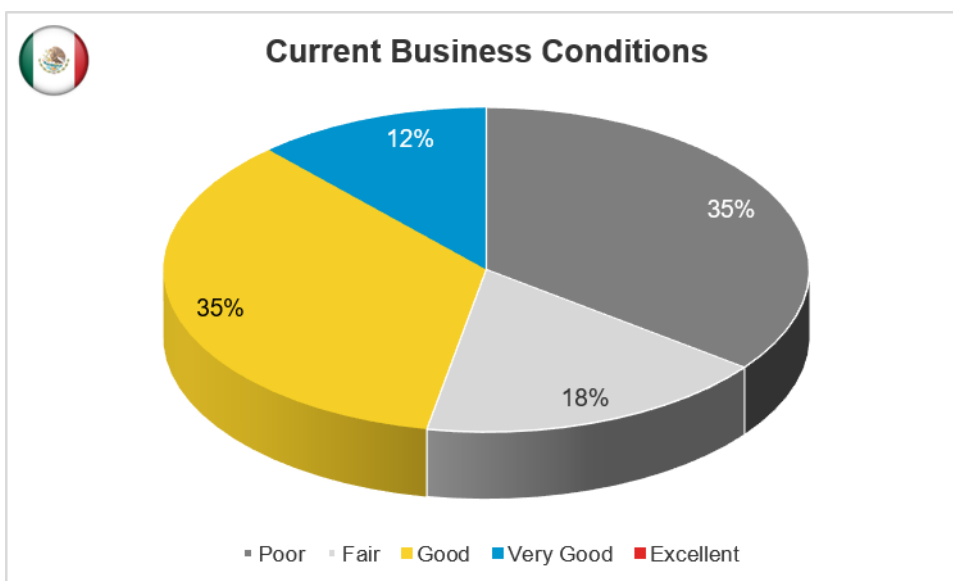


MEXICO

MOULDMAKERS + DIEMAKERS + PRECISION MACHINING

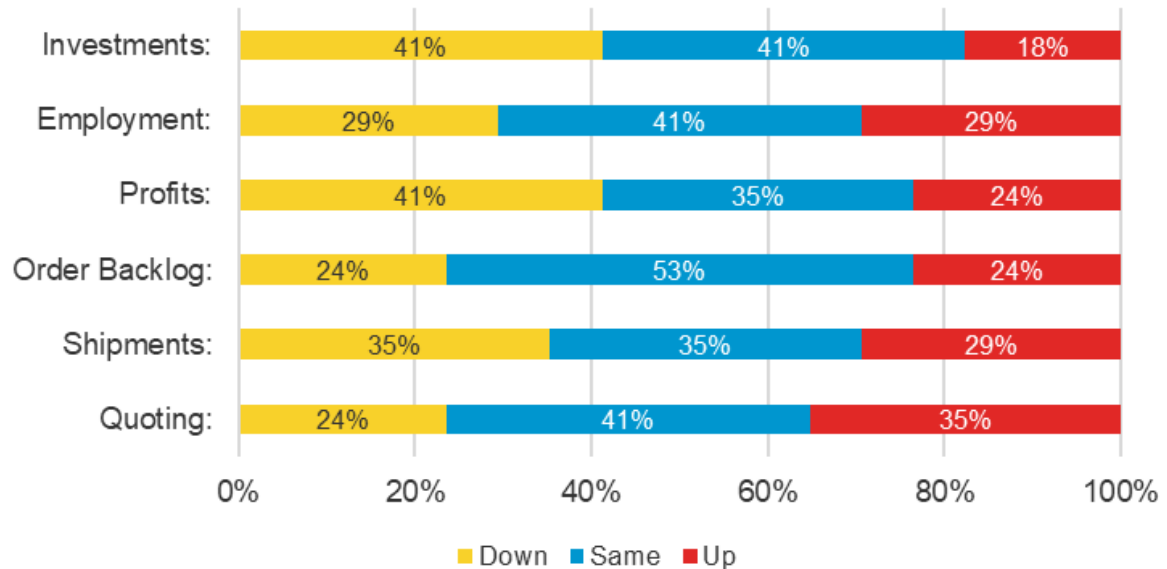
(17 SURVEY RESPONSES)

Average of Skilled Employees	21
Current Average Work Week Per Skilled Employee	41
Future Work Currently on Order Books (average):	1-4 weeks
Company Activity:	
Large > 10 Tones	18%
Small / Medium < 10 Tones	71%
Did not answer	11%

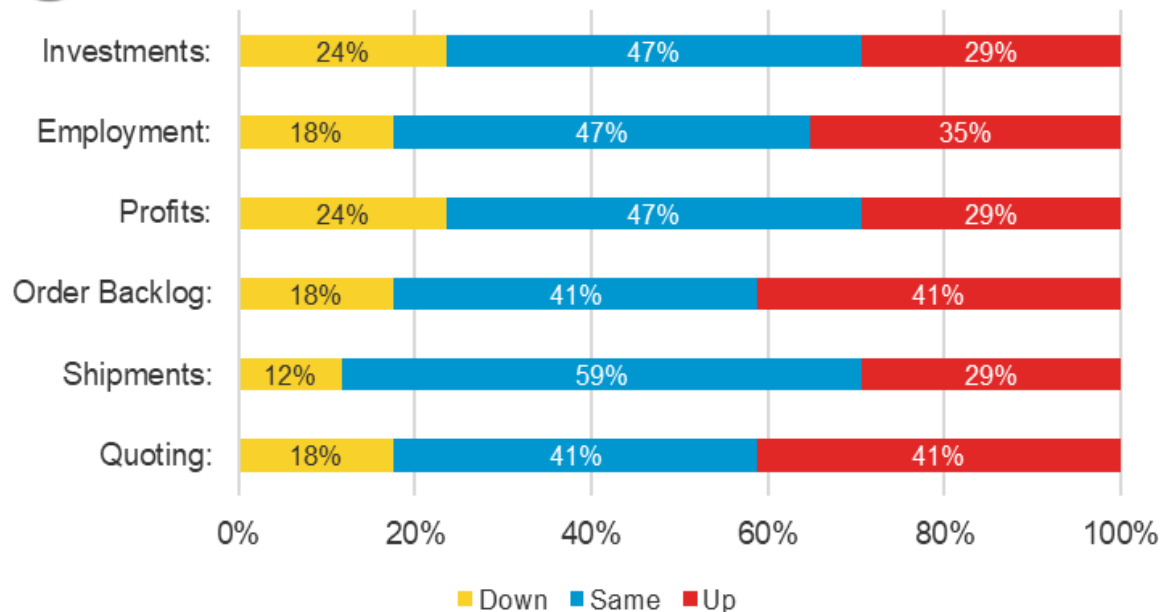




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



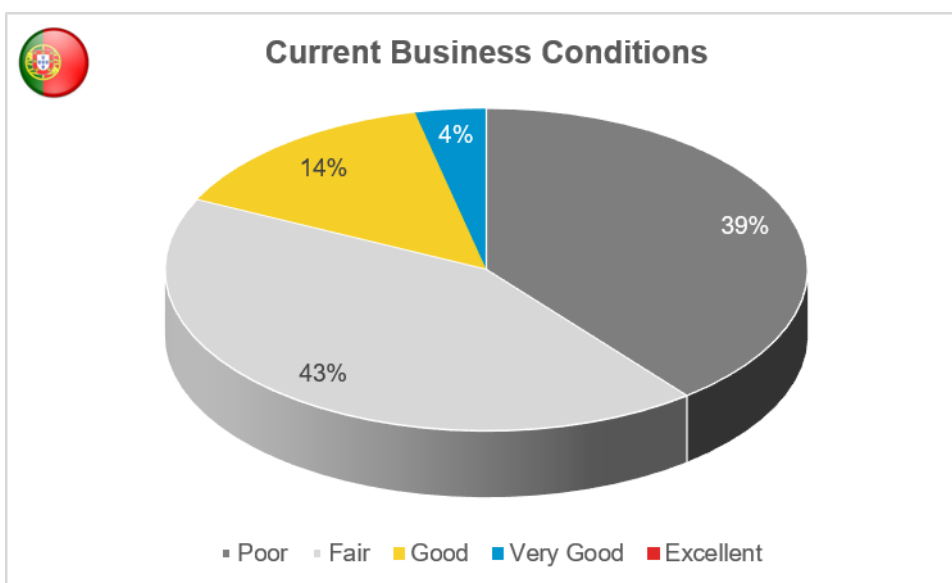


PORTUGAL

MOULDMAKERS + PRECISION MACHINING

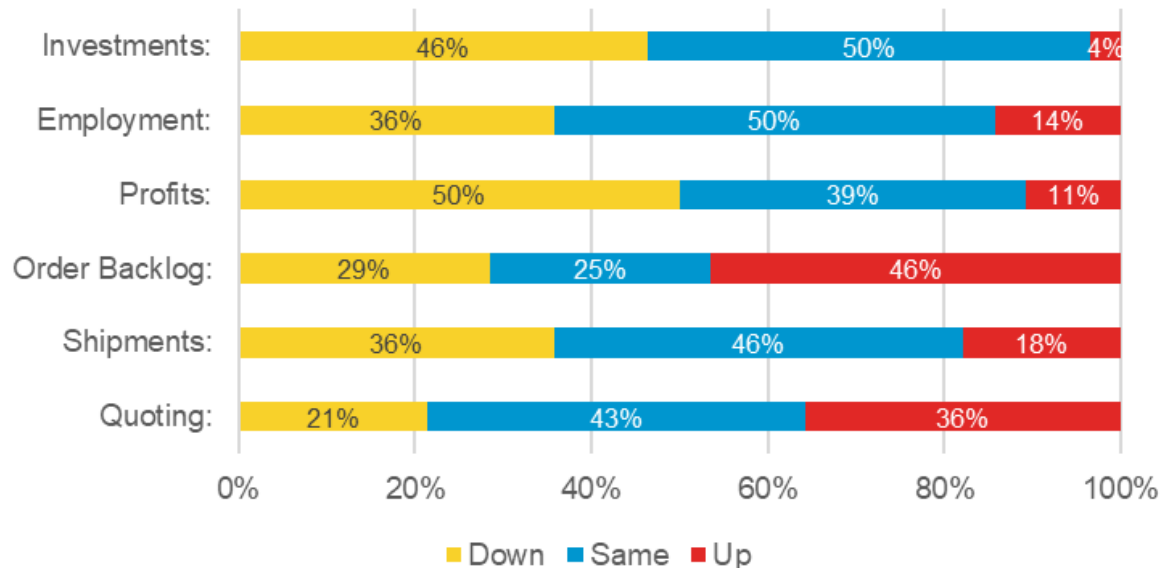
(28 SURVEY RESPONSES)

Average of Skilled Employees	94
Current Average Work Week Per Skilled Employee	39
Future Work Currently on Order Books (average):	+12 weeks
Company Activity:	
Large > 10 Tones	29%
Small / Medium < 10 Tones	68%
Did not answer	3%

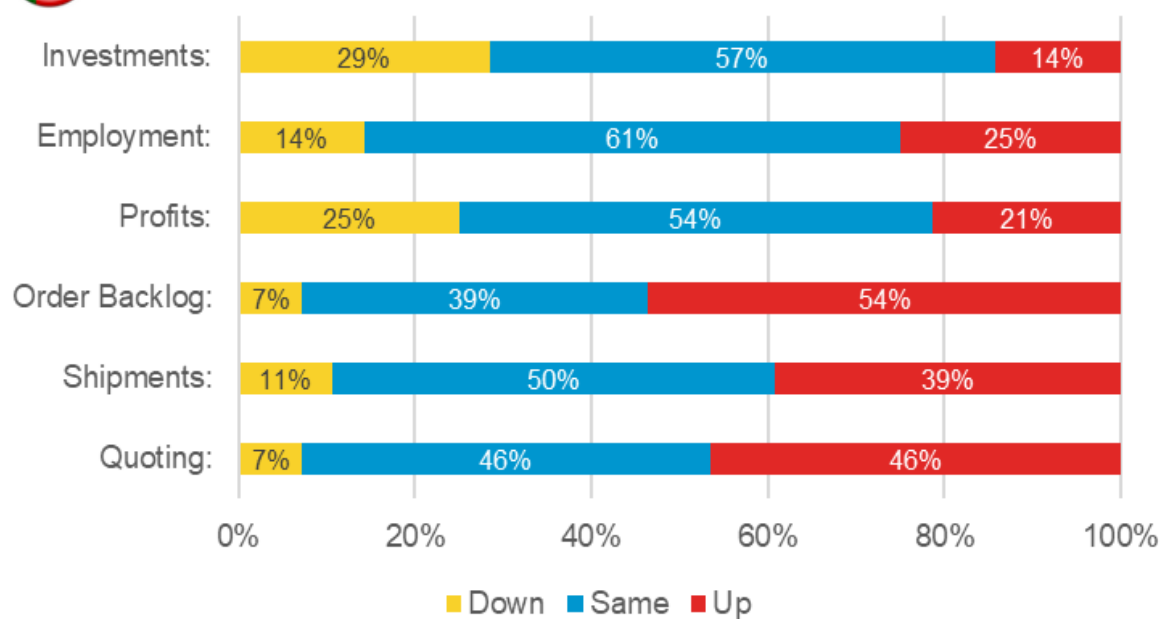




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



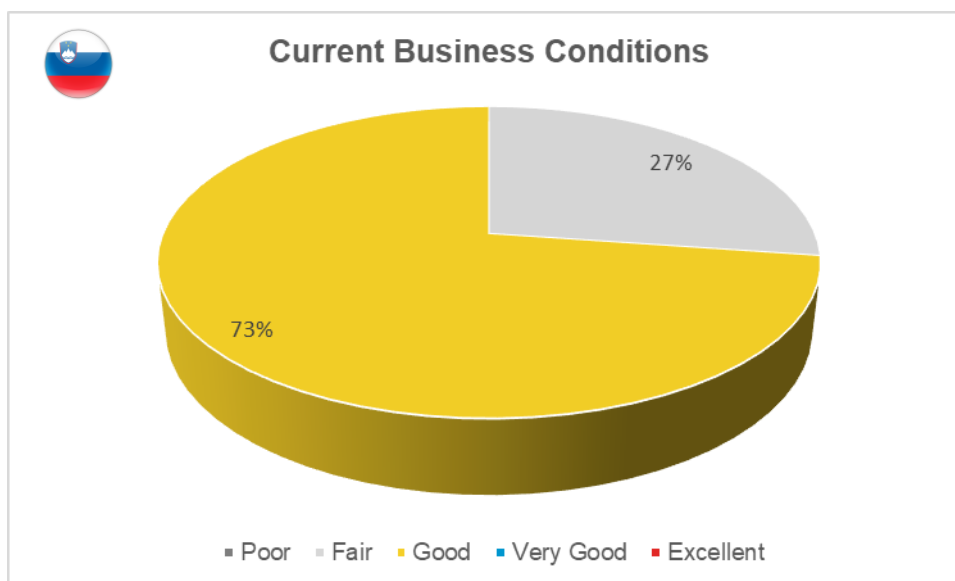


SLOVENIA

MOULDMAKERS + DIEMAKERS

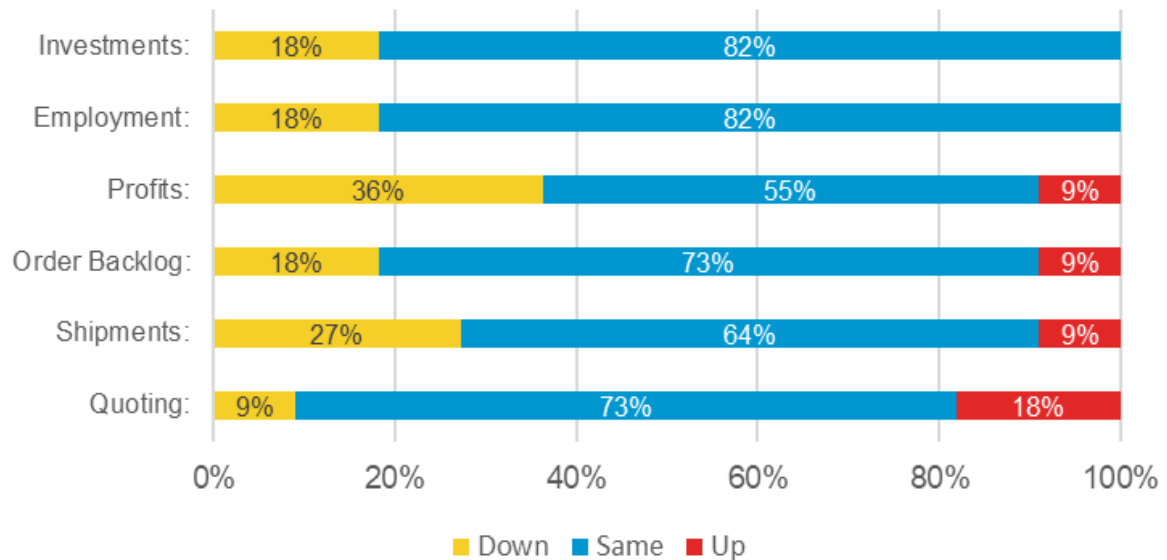
(11 SURVEY RESPONSES)

Average of Skilled Employees	38
Current Average Work Week Per Skilled Employee	40
Future Work Currently on Order Books (average):	
Company Activity:	
Large > 10 Tones	0%
Small / Medium < 10 Tones	100%
Did not answer	

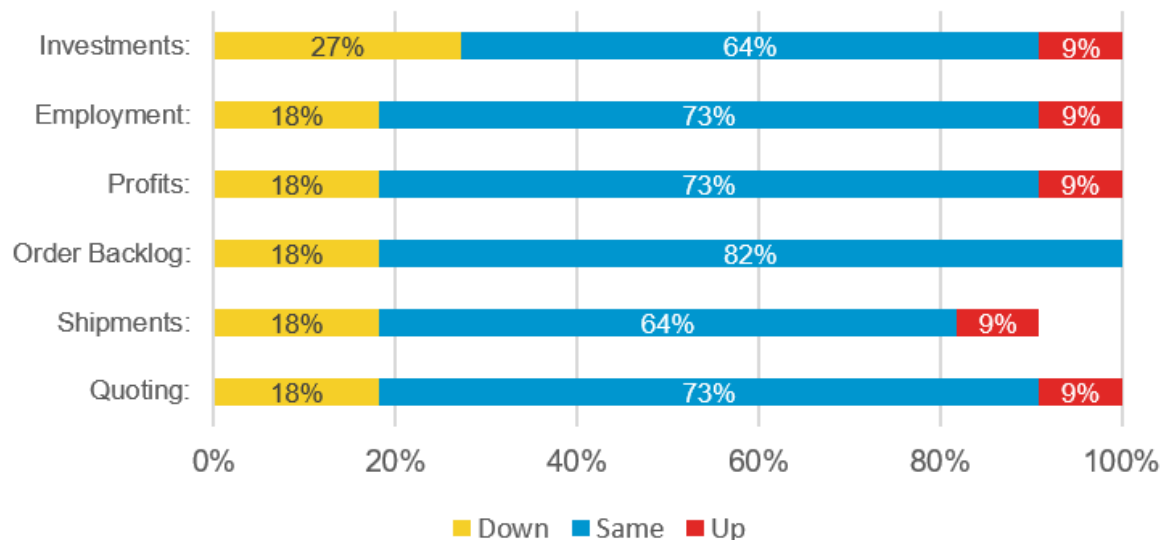




Current Business Conditions compared last semester



Current Business Conditions compared last semester



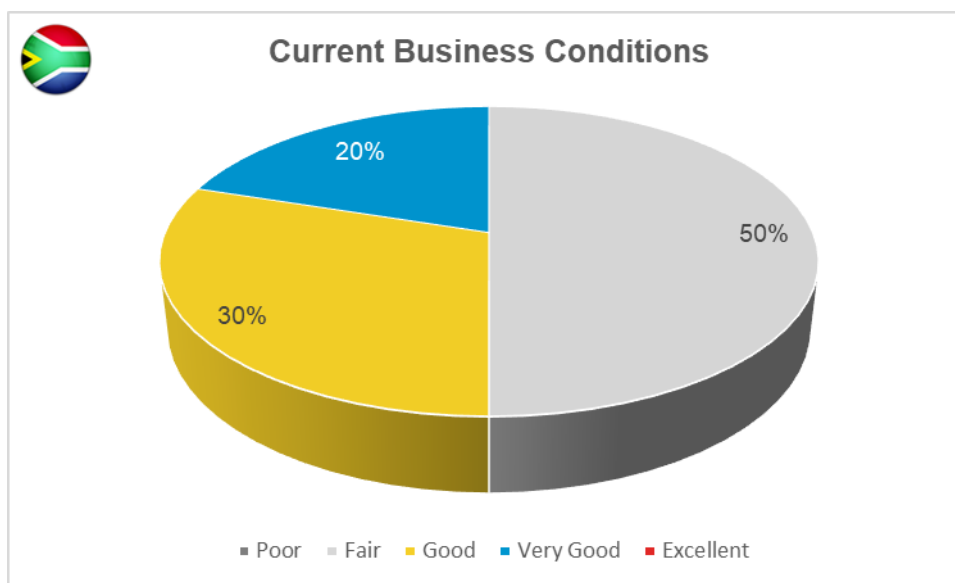


SOUTH AFRICA

DIEMAKERS + PRECISION MACHINING

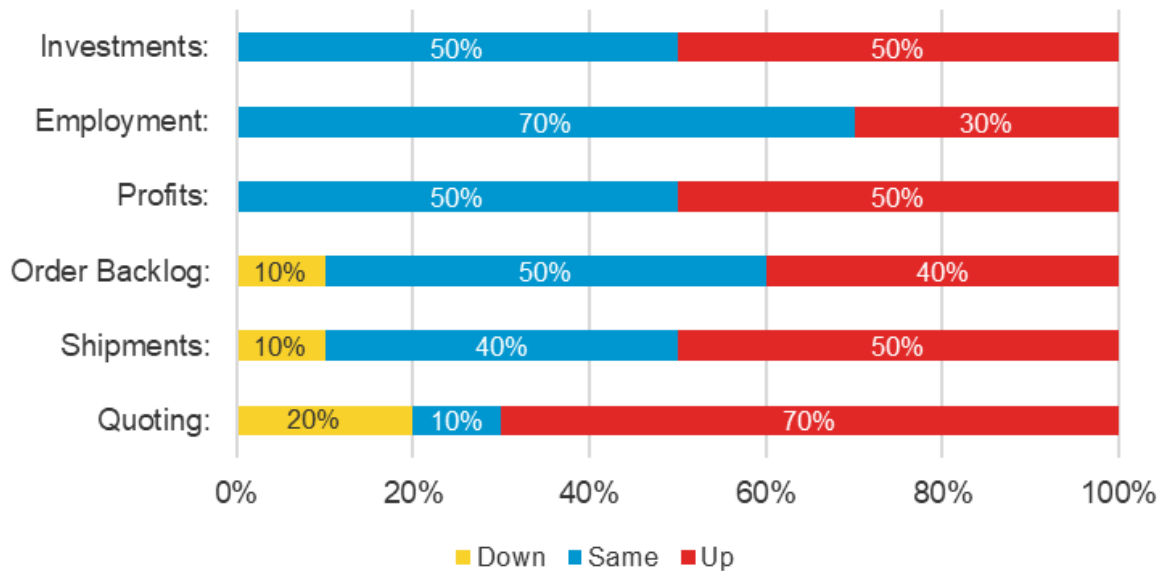
(10 SURVEY RESPONSES)

Average of Skilled Employees	13
Current Average Work Week Per Skilled Employee	41
Future Work Currently on Order Books (average):	5-8 weeks
Company Activity:	
Large > 10 Tones	20%
Small / Medium < 10 Tones	80%
Did not answer	

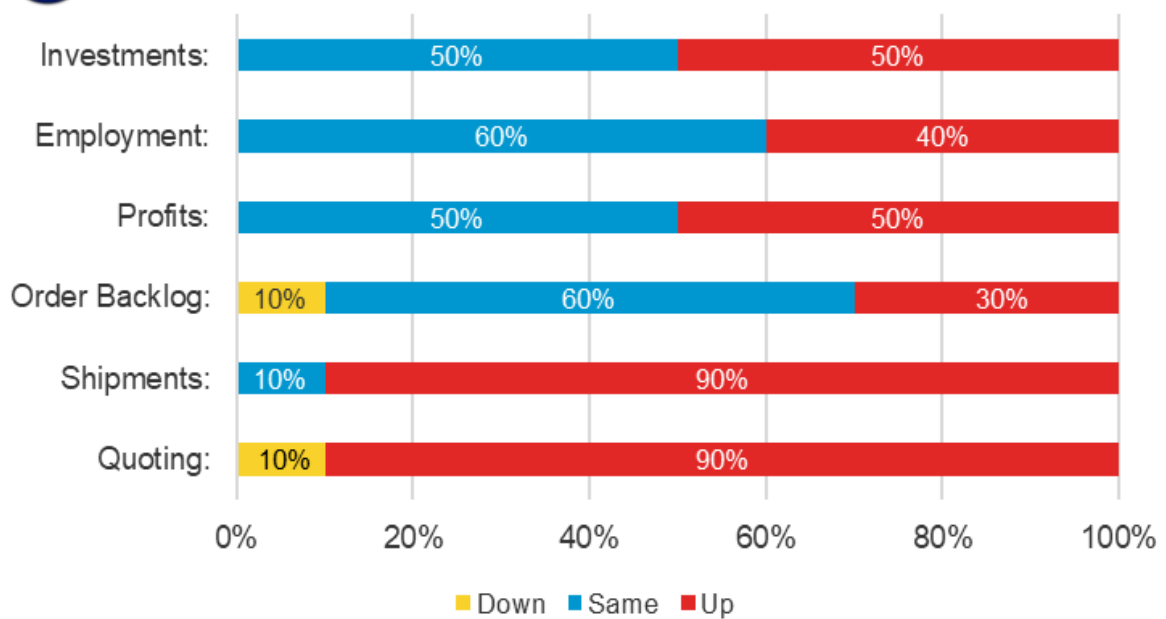




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



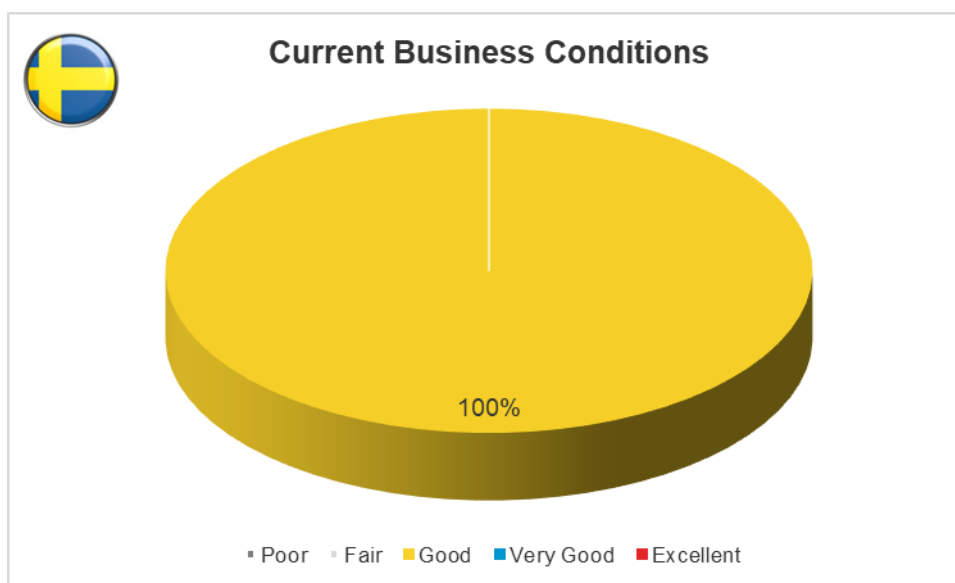


SWEDEN

MOULDMAKERS

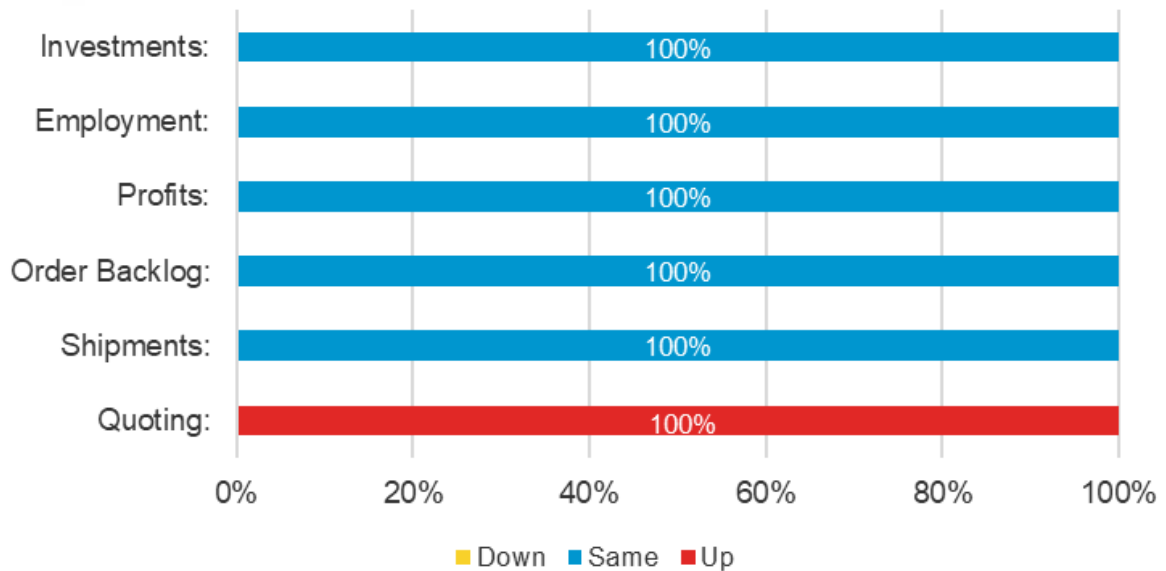
(1 SURVEY RESPONSE)

Average of Skilled Employees	45
Current Average Work Week Per Skilled Employee	40
Future Work Currently on Order Books (average):	5-8 weeks
Company Activity:	
Large > 10 Tones	0%
Small / Medium < 10 Tones	100%
Did not answer	

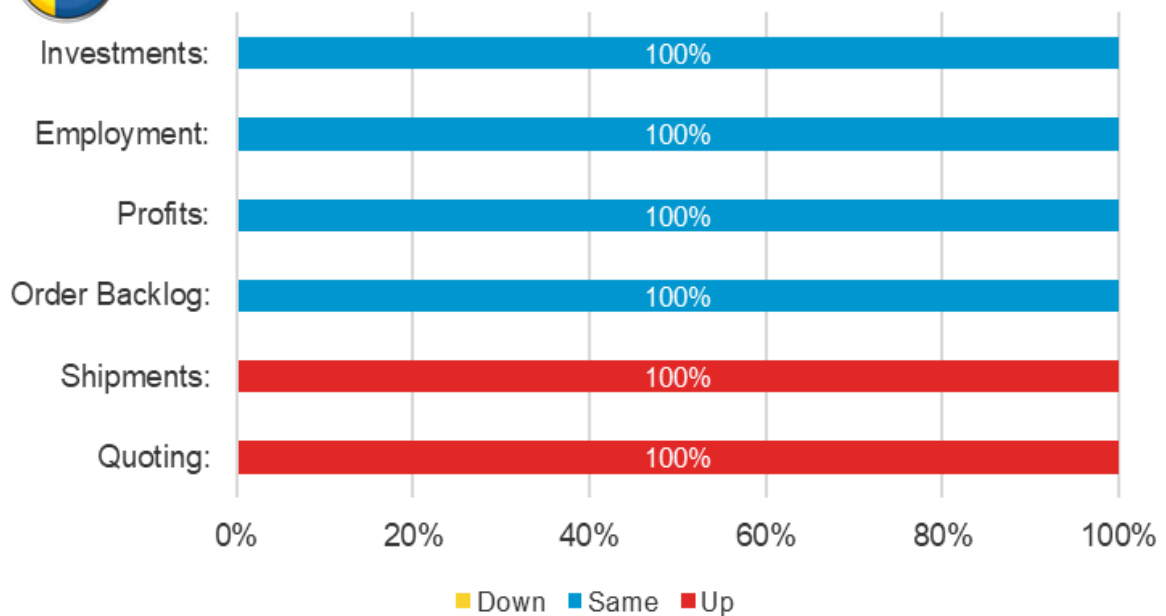




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



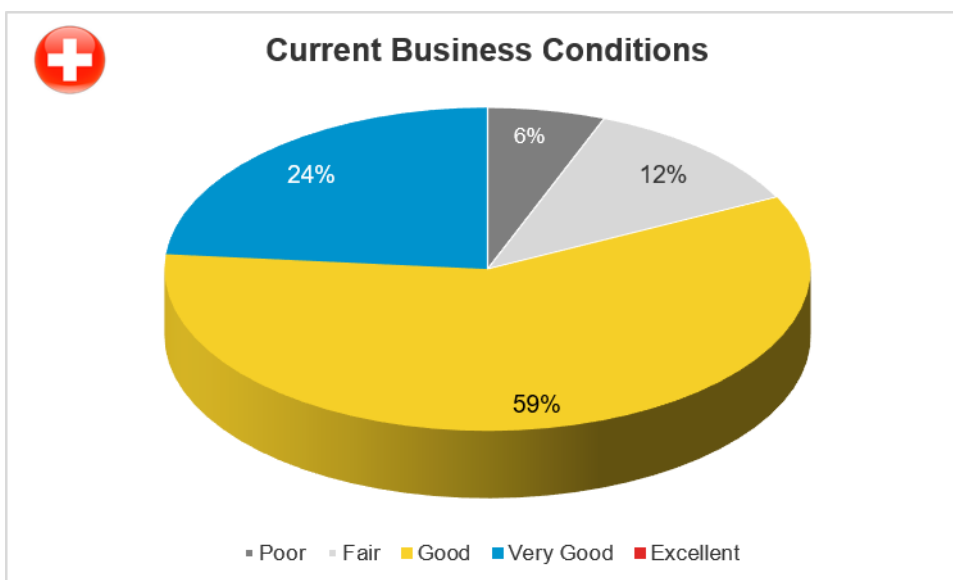


SWITZERLAND

MOULDMAKERS + DIEMAKERS + PRECISION MACHINING

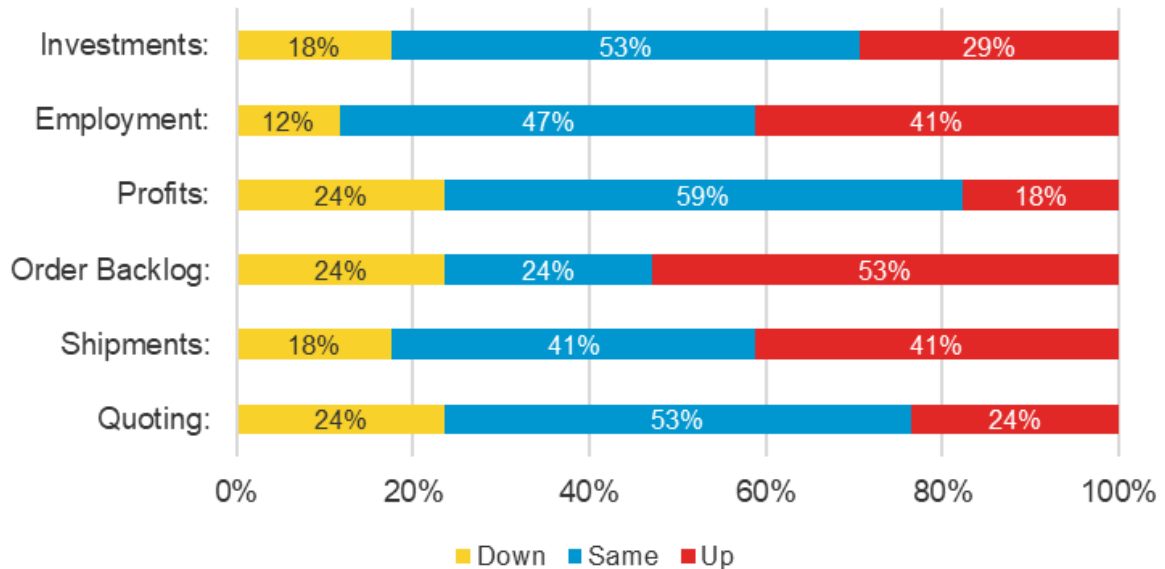
(17 SURVEY RESPONSES)

Average of Skilled Employees	96
Current Average Work Week Per Skilled Employee	42
Future Work Currently on Order Books (average):	9-12 weeks
Company Activity:	
Large > 10 Tones	0%
Small / Medium < 10 Tones	94%
Did not answer	6%

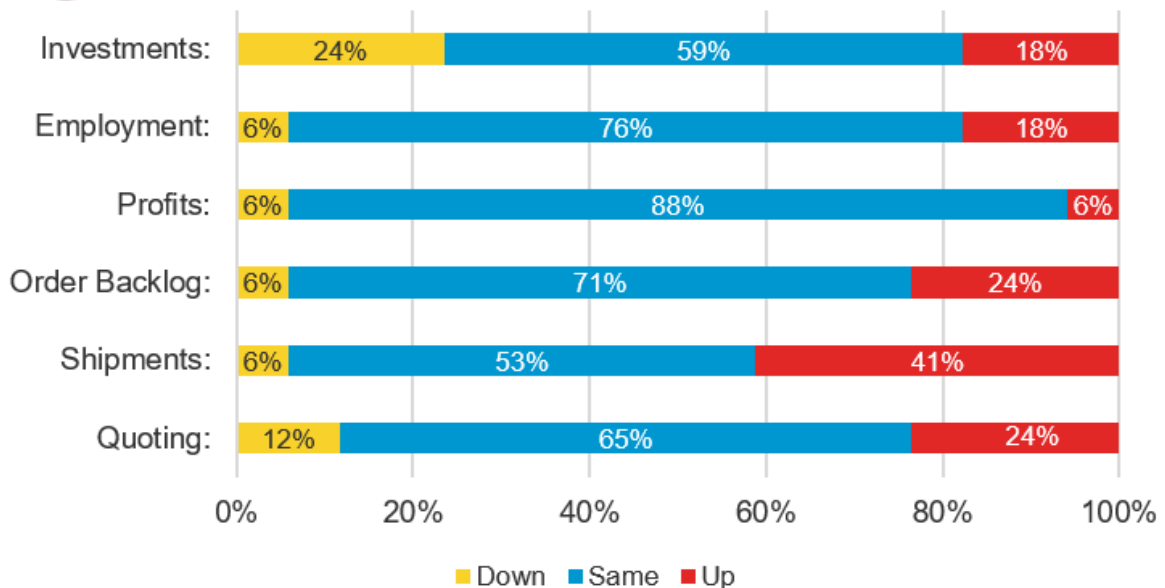




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



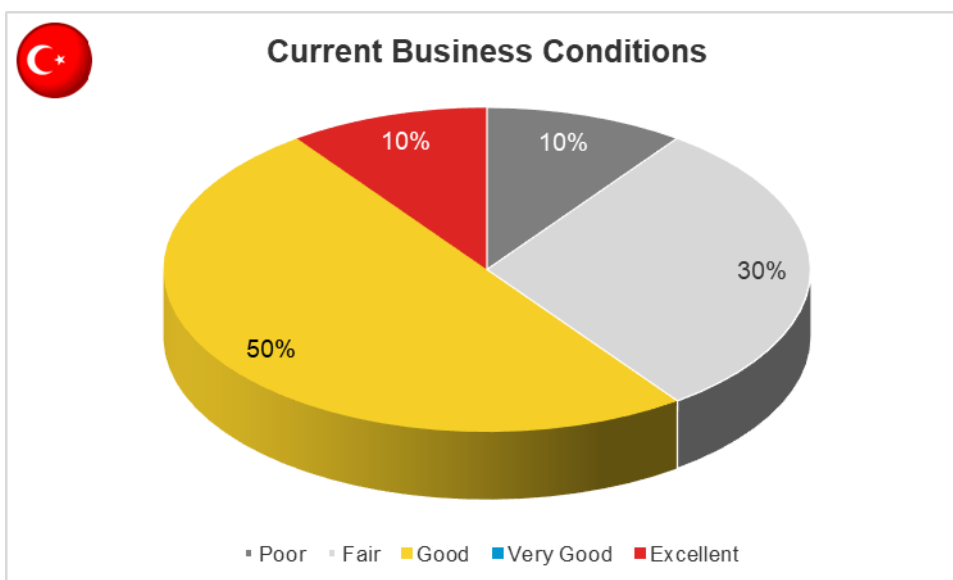


TURKEY

MOULDMAKERS + DIEMAKERS

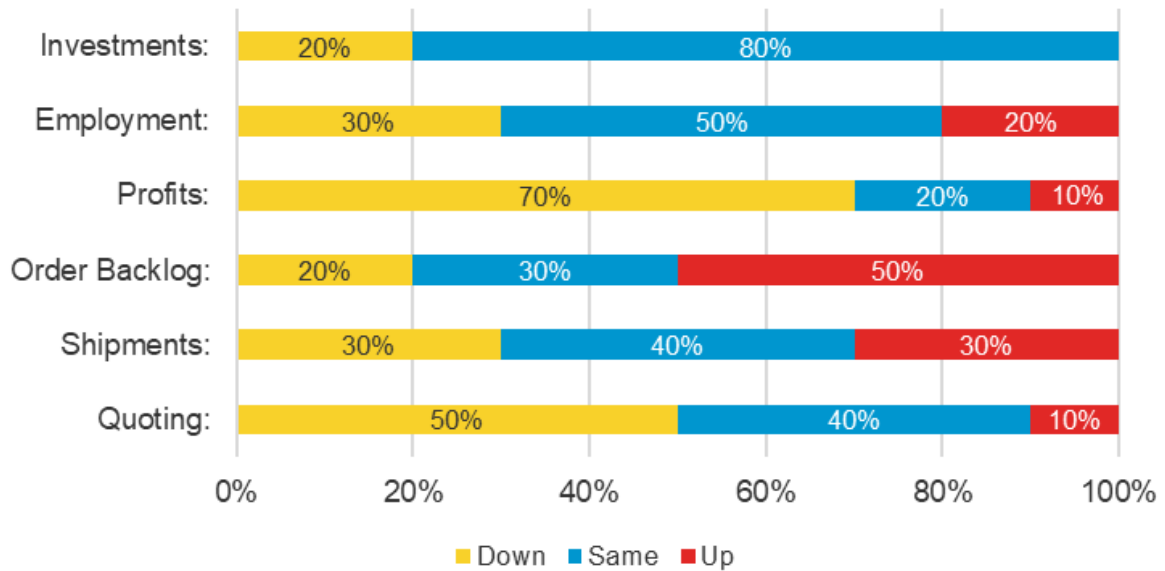
(10 SURVEY RESPONSES)

Average of Skilled Employees	49
Current Average Work Week Per Skilled Employee	48
Future Work Currently on Order Books (average):	5-8 weeks
Company Activity:	
Large > 10 Tones	30%
Small / Medium < 10 Tones	70%
Did not answer	

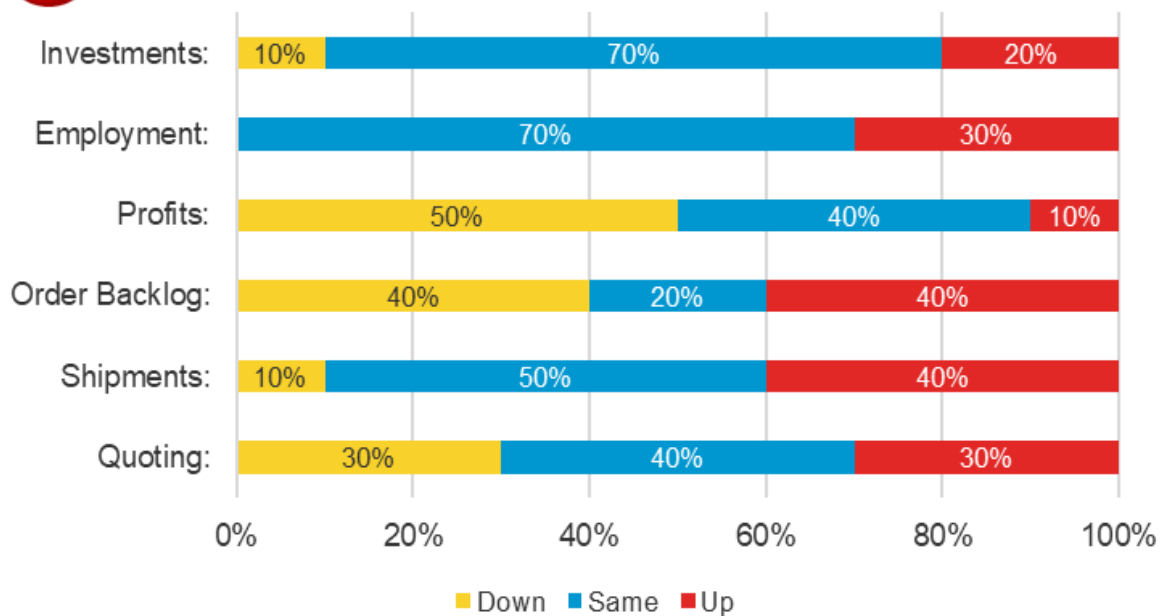




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months



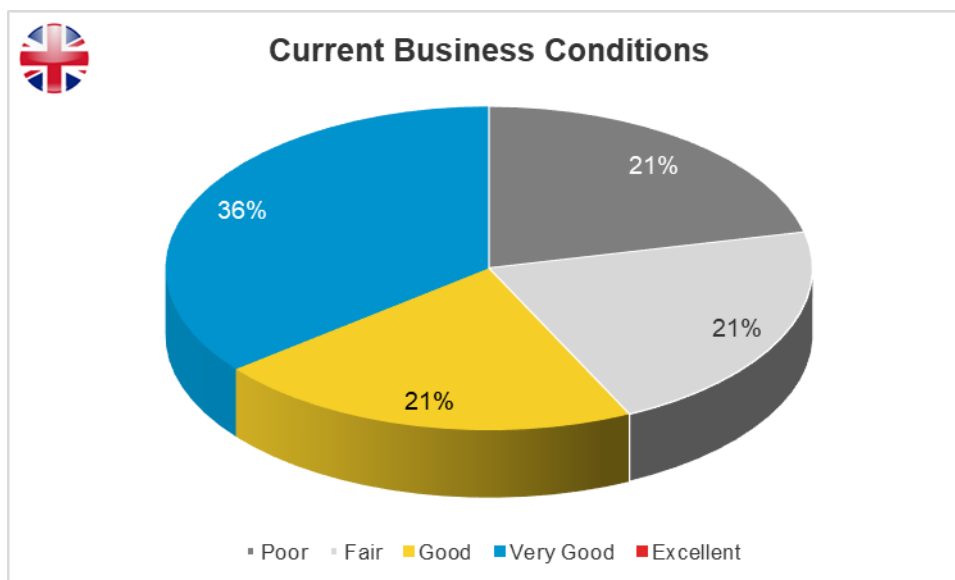


UNITED KINGDOM

MOULDMAKERS + DIEMAKERS + PRECISION MACHINING

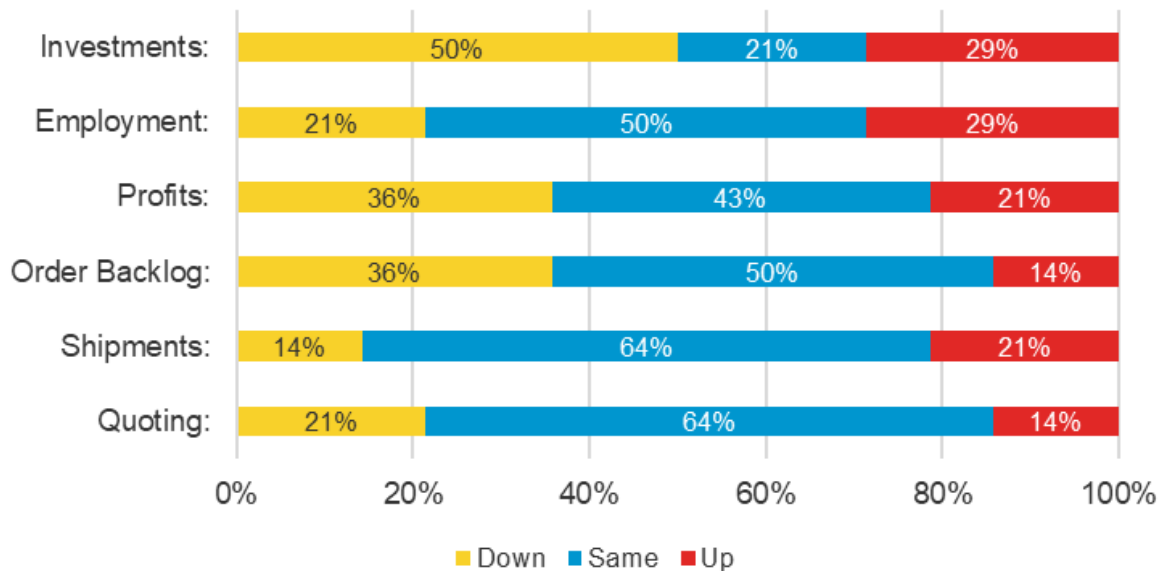
(14 SURVEY RESPONSES)

Average of Skilled Employees	19
Current Average Work Week Per Skilled Employee	40
Future Work Currently on Order Books (average):	+12 weeks
Company Activity:	
Large > 10 Tones	7%
Small / Medium < 10 Tones	93%
Did not answer	

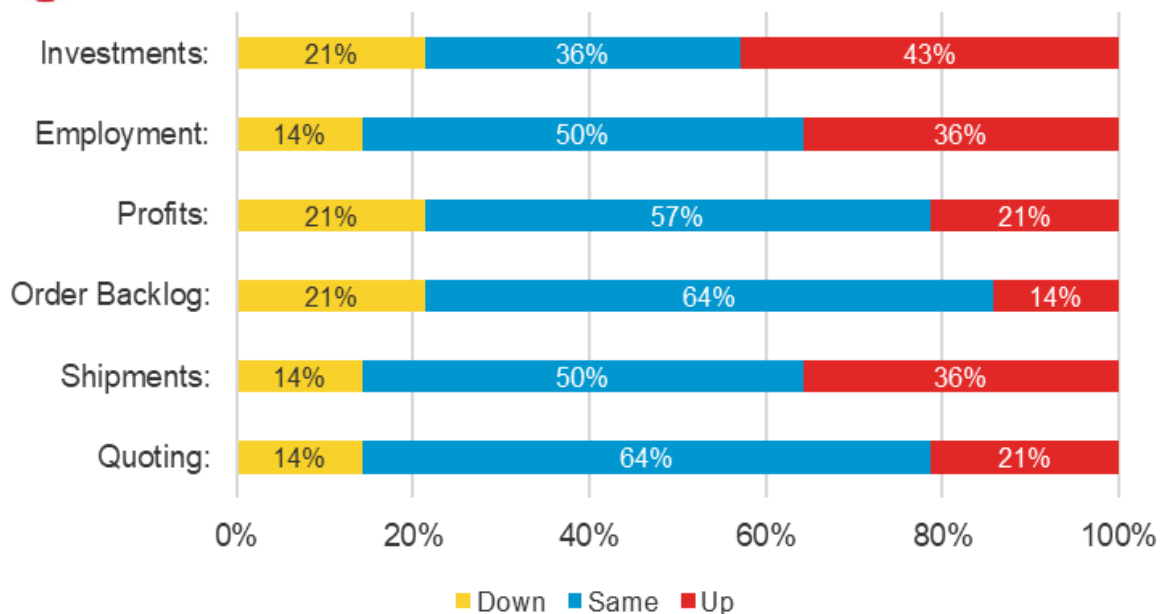




Current Business Conditions compared last semester



Projected Business Conditions Over 6 Months





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INTERNATIONAL SPECIAL TOOLING AND MACHINING ASSOCIATION



MARKET OVERVIEW

Data provided by the Global Partners:



GF MACHINING SOLUTIONS



MAKINO



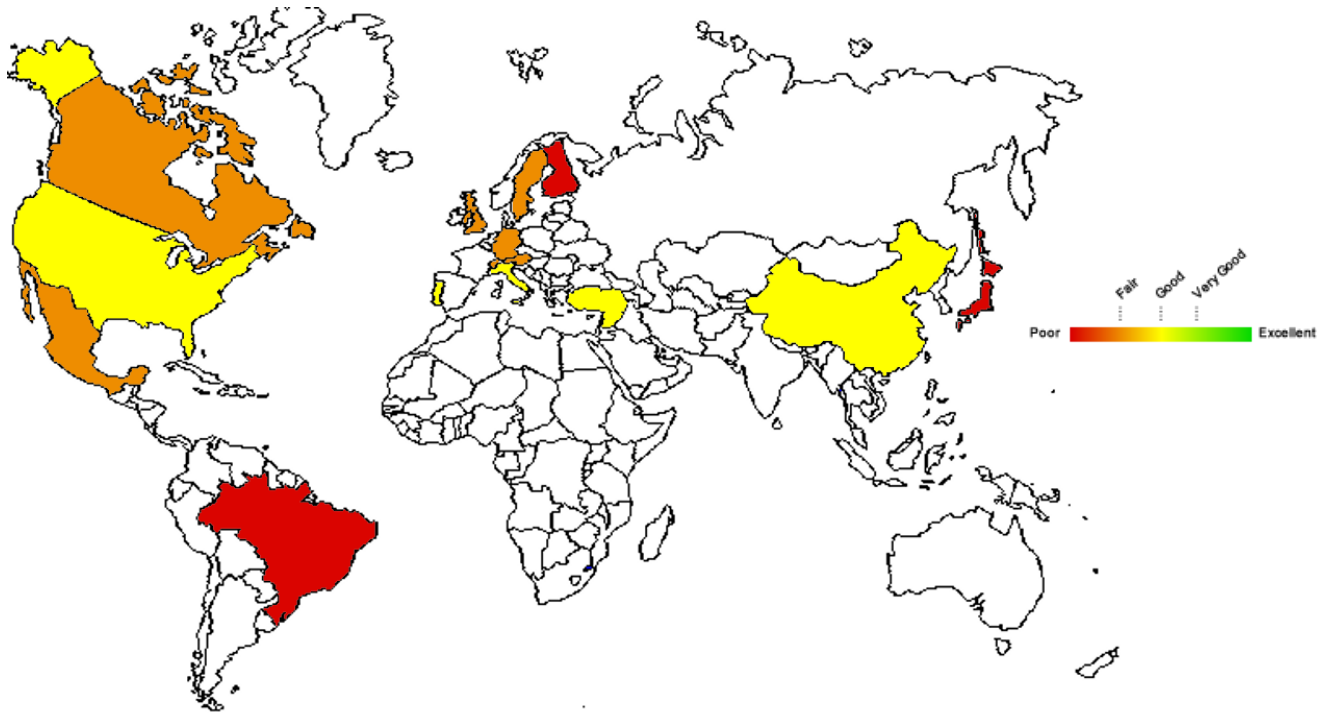
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INTERNATIONAL SPECIAL TOOLING AND MACHINING ASSOCIATION

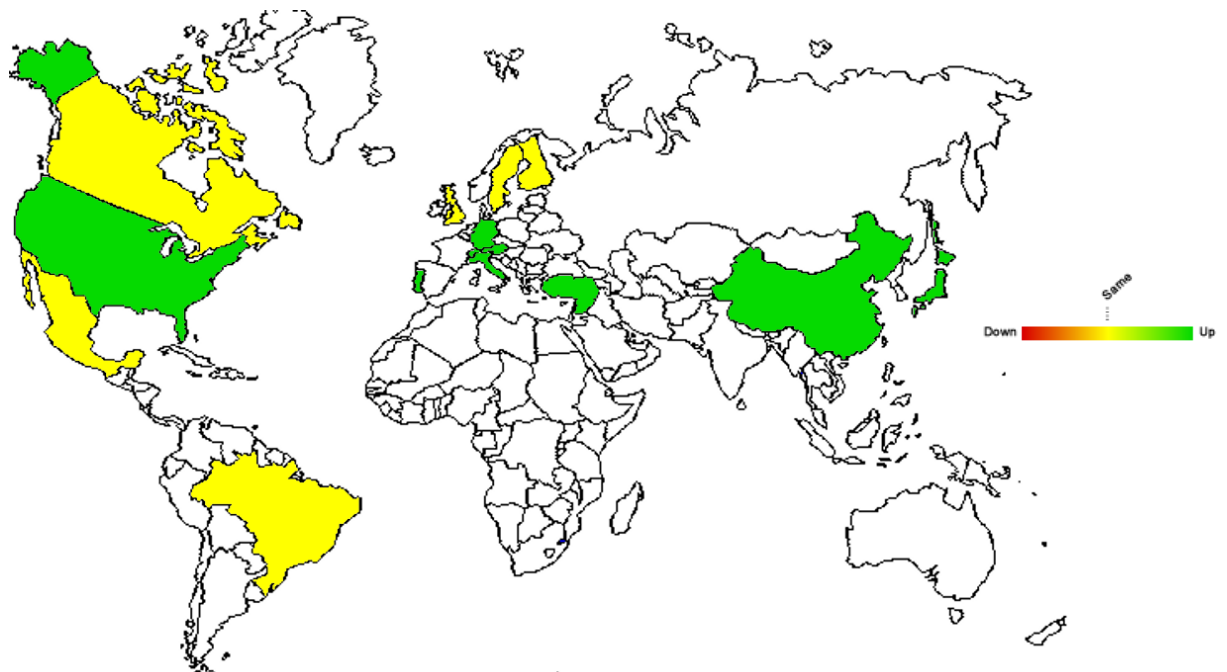


Mouldmaking Market Overview

Current Business Conditions



Business Conditions Forecast





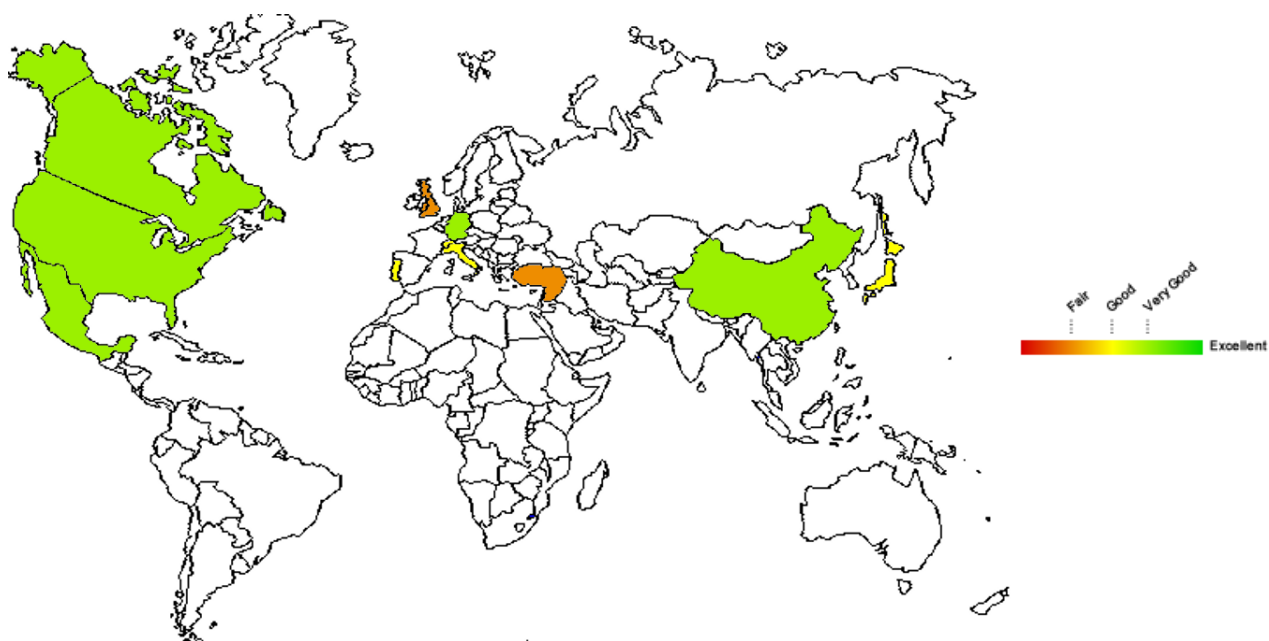
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INTERNATIONAL SPECIAL TOOLING AND MACHINING ASSOCIATION

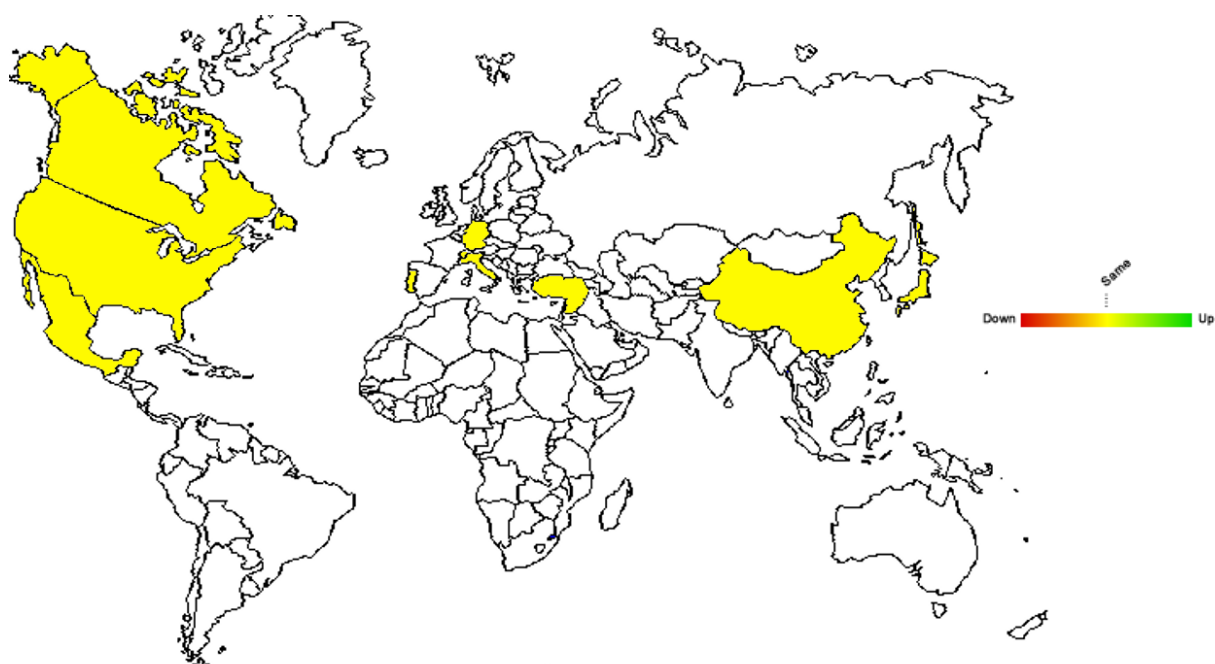
Mouldmaking Market Overview



Current Business Conditions



Business Conditions Forecast





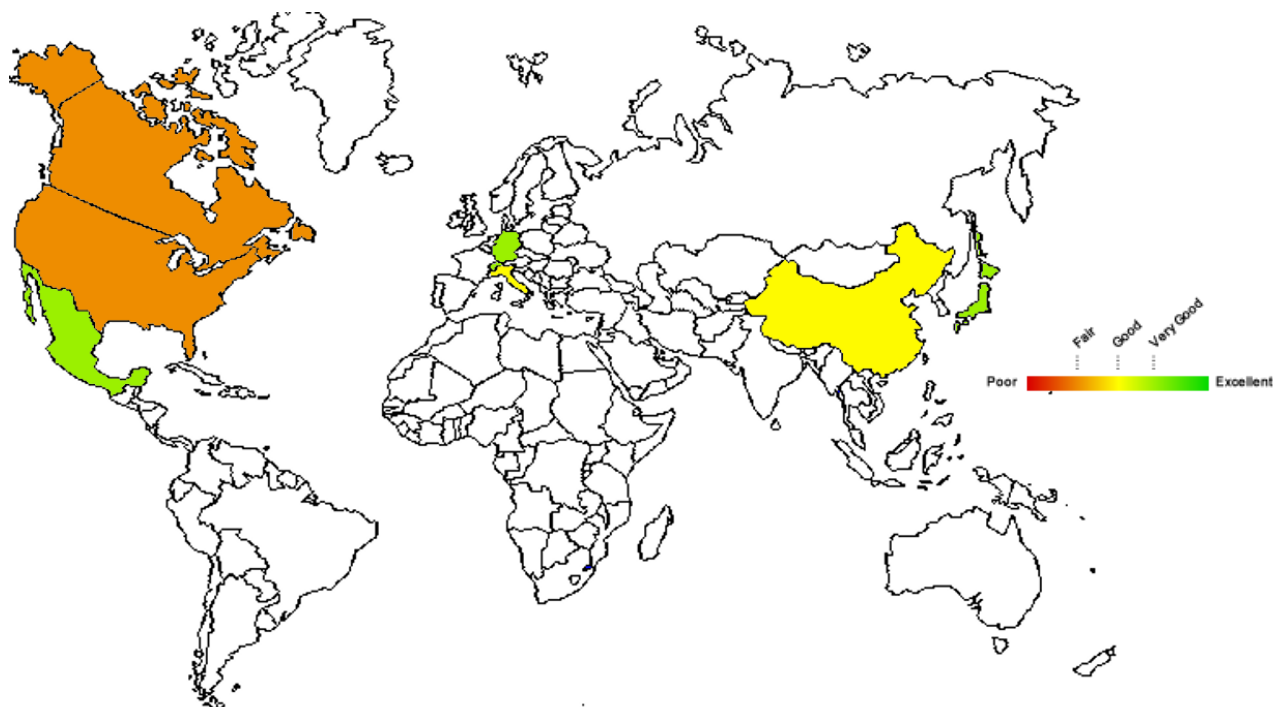
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INTERNATIONAL SPECIAL TOOLING AND MACHINING ASSOCIATION

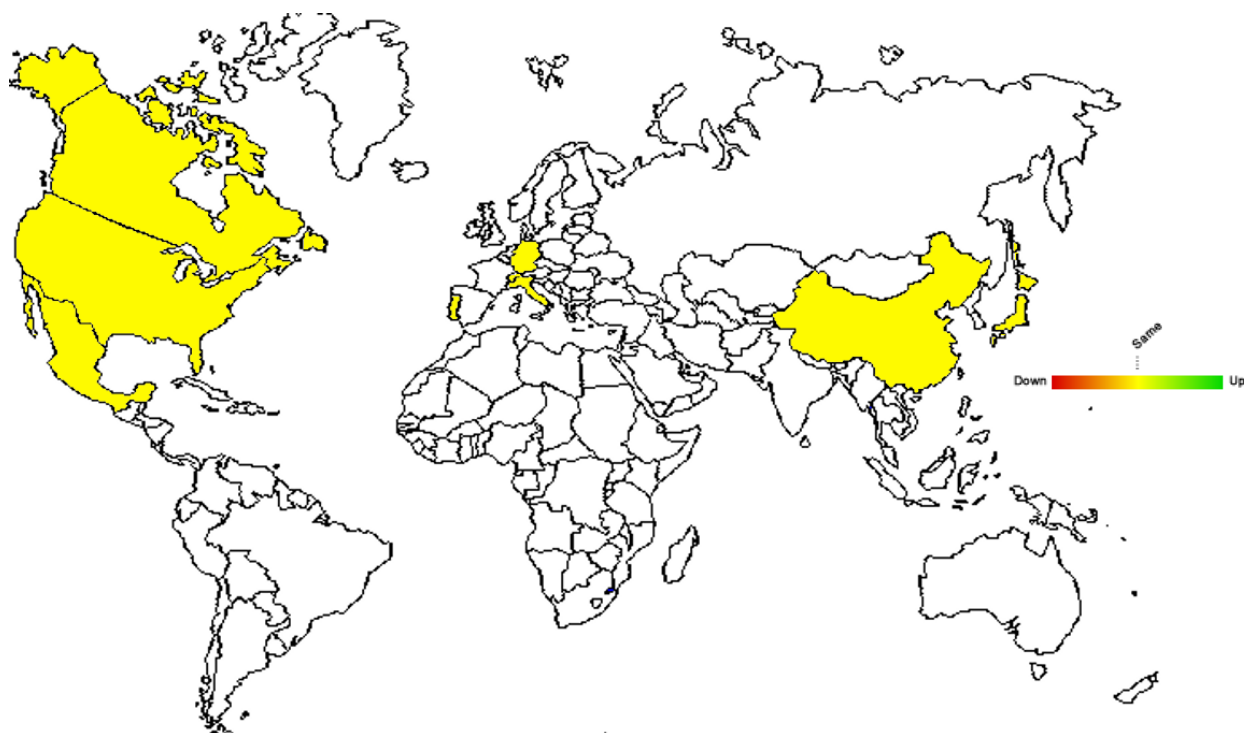
Diemaking Market Overview



Current Business Conditions



Business Conditions Forecast





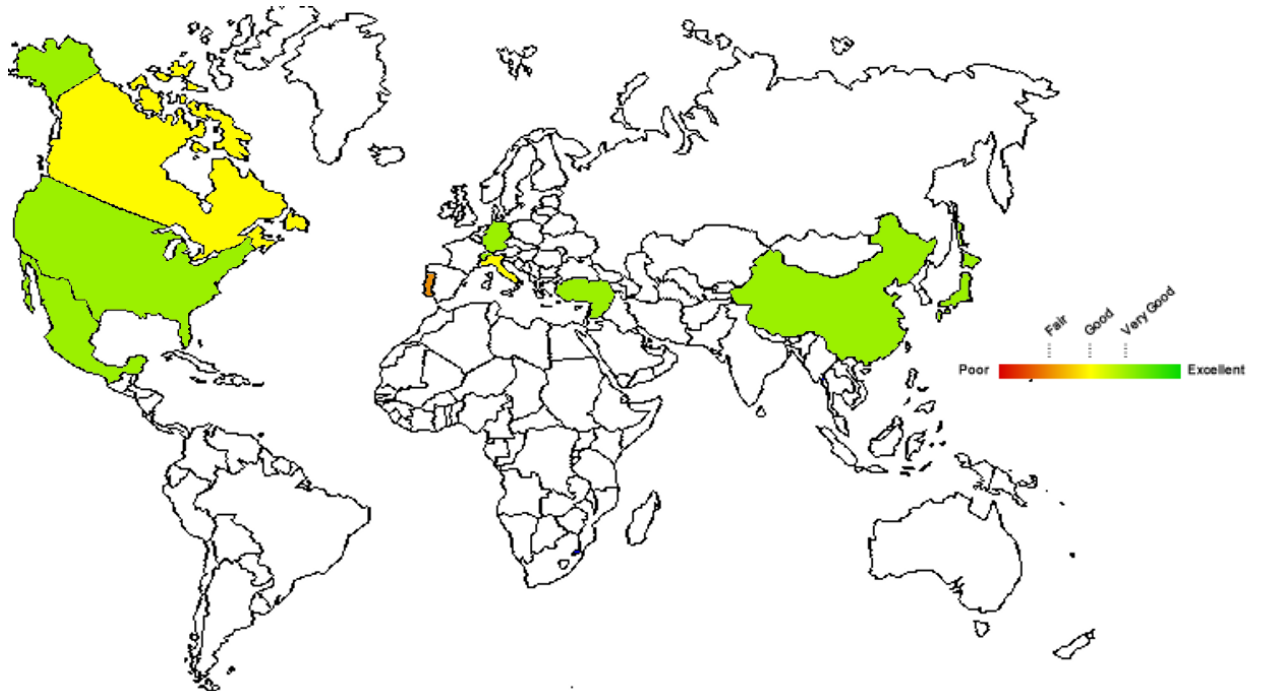
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INTERNATIONAL SPECIAL TOOLING AND MACHINING ASSOCIATION

Precision Machining Market Overview



Current Business Conditions



Business Conditions Forecast

