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world

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**ISTMA**

**BUSINESS CONDITIONS REPORT**

For six-month period ending  
December 31st, 2022

*Results compiled by:  
ISTMA World Secretariat  
February 24th, 2023*

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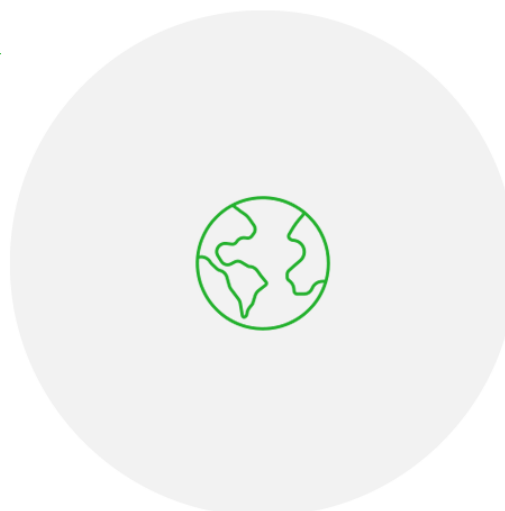
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# GLOBAL SUMMARY

## 15 Countries

Brazil  
Canada  
Czech Republic  
Estonia  
Finland  
Germany  
Italy  
Japan  
Mexico  
Portugal  
Slovenia  
South Africa  
Switzerland  
Turkey  
United Kingdom



## 201 answers Business profile



### Main activity

Moulds	<b>57 %</b>
Dies	<b>21 %</b>
Precision Machining	<b>22 %</b>

### Size (tons)

Small / Medium (<10 tons)	<b>74 %</b>
Large (> 10 tons)	<b>21 %</b>

9 companies didn't provide answer

### Future work currently on order books (in weeks)

1 - 4 weeks	<b>20 %</b>
5 - 8 weeks	<b>20 %</b>
9 - 12 weeks	<b>29 %</b>
+ 12 weeks	<b>30 %</b>

# GLOBAL SUMMARY

## People & work

Total number of skilled employees **14 693**

Current average work week per skilled employee

Until 40 hours **50 %**

Between 40 - 50 hours **47 %**

Over 50 hours **3 %**

Number of working shifts

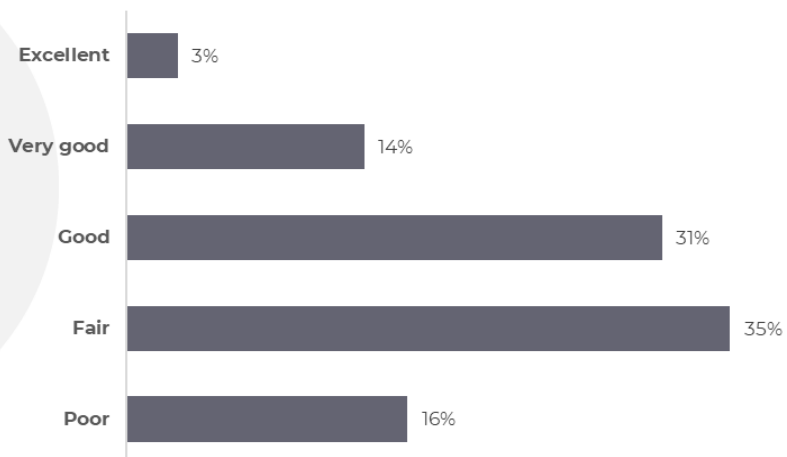
1 shift **51 %**

2 shifts **34 %**

3 shifts **14 %**



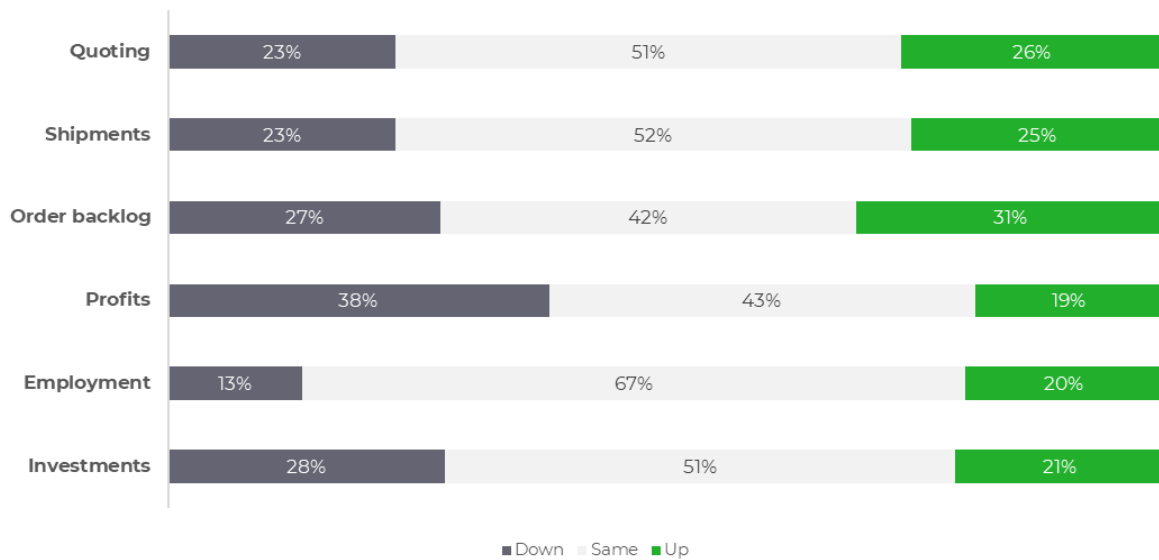
## Current business conditions



# GLOBAL SUMMARY

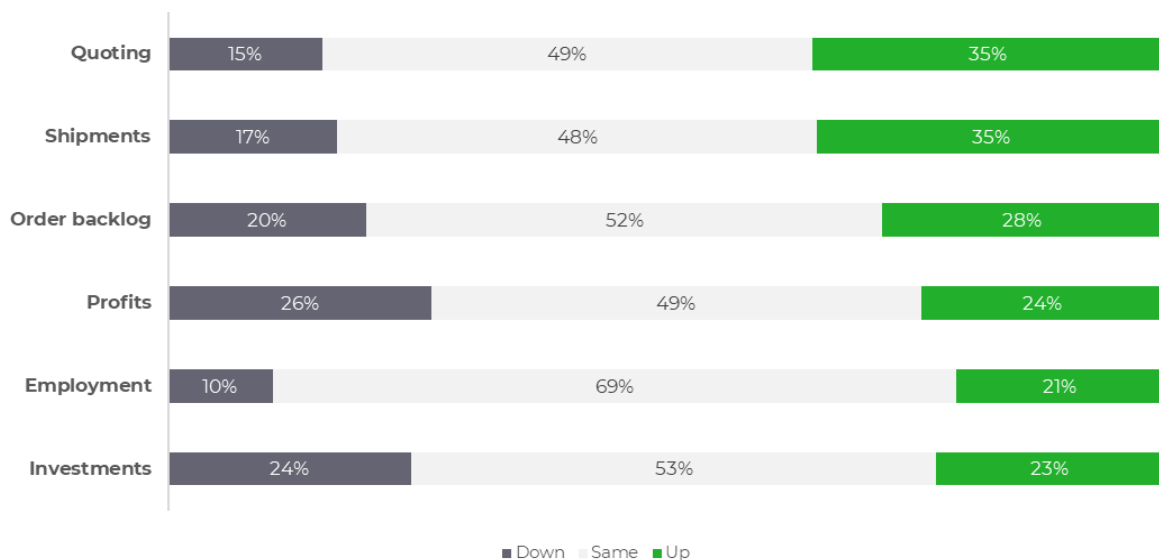
## Current business conditions

Compared with last semester



## Projected business conditions

Over six months



# COUNTRY SUMMARY

## Brazil



### 19 answers Business profile

#### Main activity

Moulds	<b>79 %</b>
Dies	<b>21 %</b>
Precision Machining	<b>0 %</b>

#### Size (tons)

Small / Medium (< 10 tons)	<b>79 %</b>
Large (> 10 tons)	<b>11 %</b>

2 companies didn't provide answer

#### Future work currently on order books (in weeks)

1 - 4 weeks	<b>32 %</b>
5 - 8 weeks	<b>16 %</b>
9 - 12 weeks	<b>26 %</b>
+ 12 weeks	<b>26 %</b>

### People & work

Total number of skilled employees **856**

#### Current average work week per skilled employee

Until 40 hours	<b>16 %</b>
Between 40 - 50 hours	<b>79 %</b>
Over 50 hours	<b>5 %</b>

#### Number of working shifts

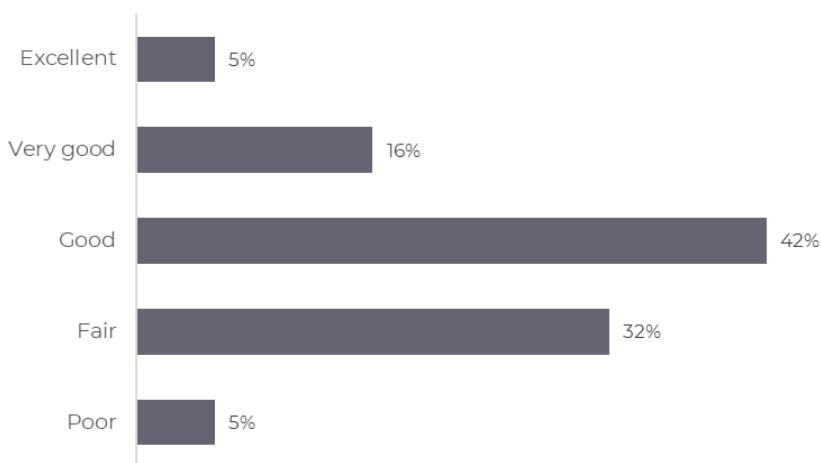
1 shift	<b>21 %</b>
2 shifts	<b>68 %</b>
3 shifts	<b>11 %</b>

# COUNTRY SUMMARY

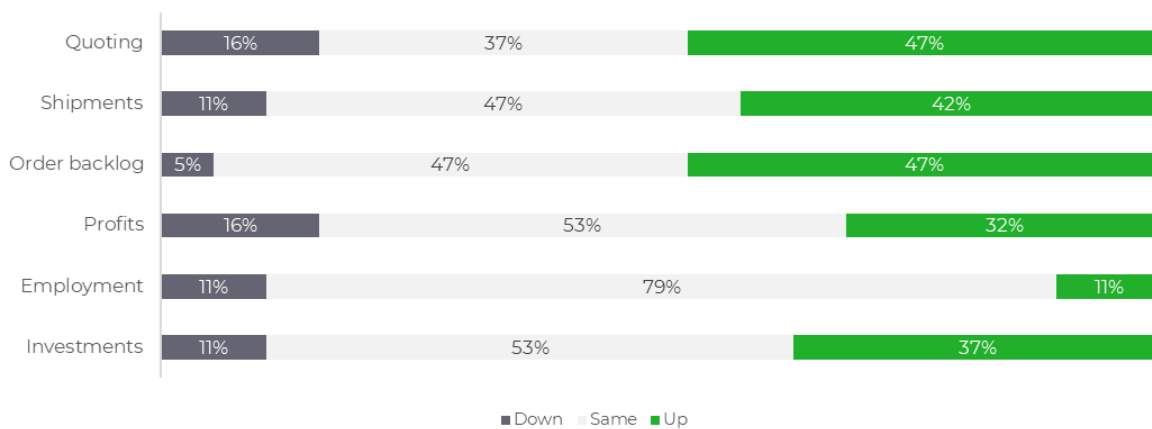
## Brazil



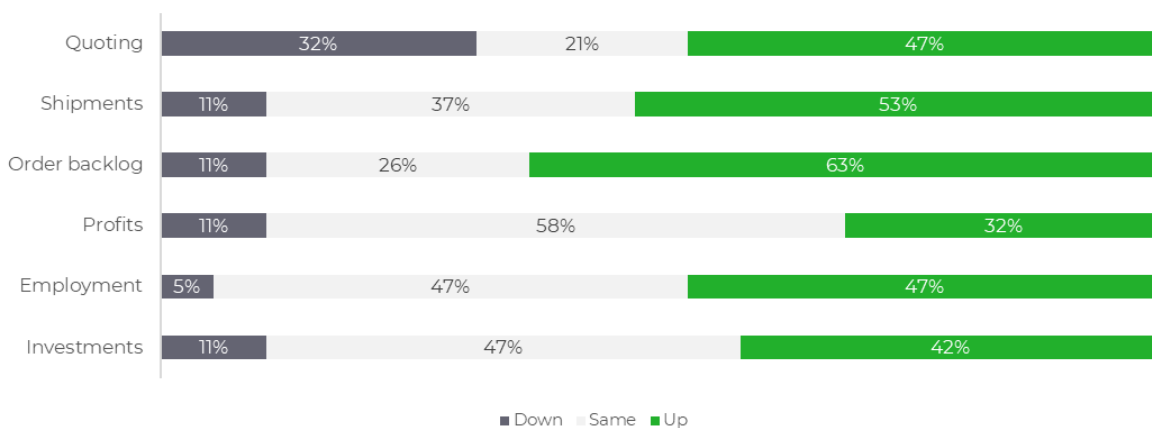
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Canada



### 25 answers Business profile

#### Main activity

Moulds	28 %
Dies	16 %
Precision Machining	56 %

#### Size (tons)

Small / Medium (< 10 tons)	44 %
Large (> 10 tons)	40 %

4 companies didn't provide answer

#### Future work currently on order books (in weeks)

1 - 4 weeks	8 %
5 - 8 weeks	12 %
9 - 12 weeks	20 %
+ 12 weeks	60 %

### People & work

Total number of skilled employees **2 051**

#### Current average work week per skilled employee

Until 40 hours	48 %
Between 40 - 50 hours	48 %
Over 50 hours	4 %

#### Number of working shifts

1 shift	36 %
2 shifts	40 %
3 shifts	24 %

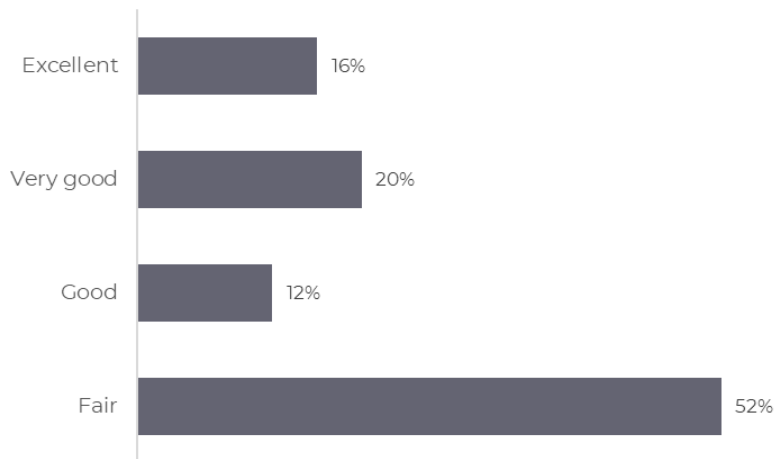


# COUNTRY SUMMARY

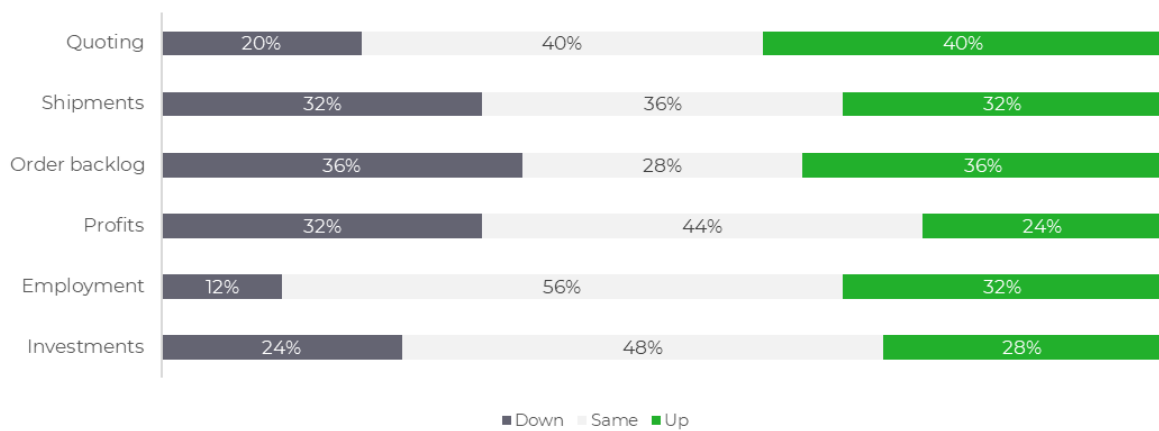
## Canada



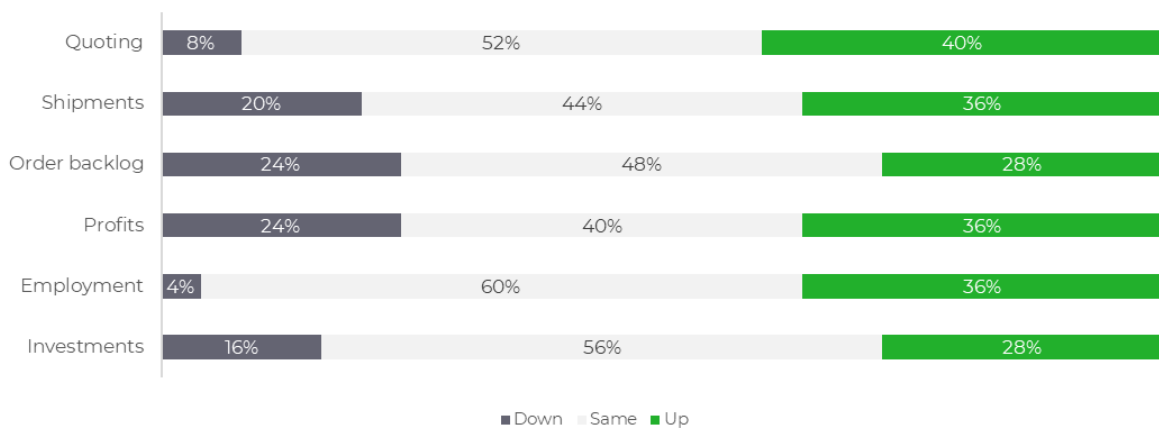
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Czech Republic



8 answers

### Business profile

#### Main activity

Moulds	25 %
Dies	63 %
Precision Machining	13 %

#### Size (tons)

Small / Medium (< 10 tons)	50 %
Large (> 10 tons)	50 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	0 %
5 - 8 weeks	13 %
9 - 12 weeks	25 %
+ 12 weeks	63 %

### People & work

Total number of skilled employees **942**

#### Current average work week per skilled employee

Until 40 hours	63 %
Between 40 - 50 hours	38 %
Over 50 hours	0 %

#### Number of working shifts

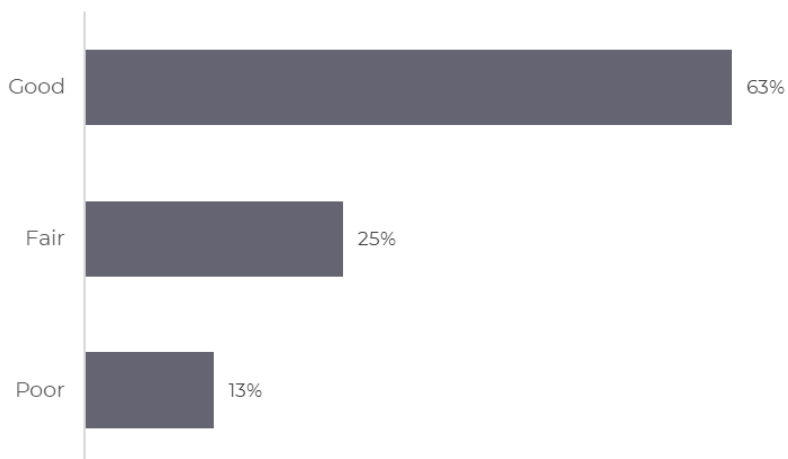
1 shift	0 %
2 shifts	50 %
3 shifts	50 %

# COUNTRY SUMMARY

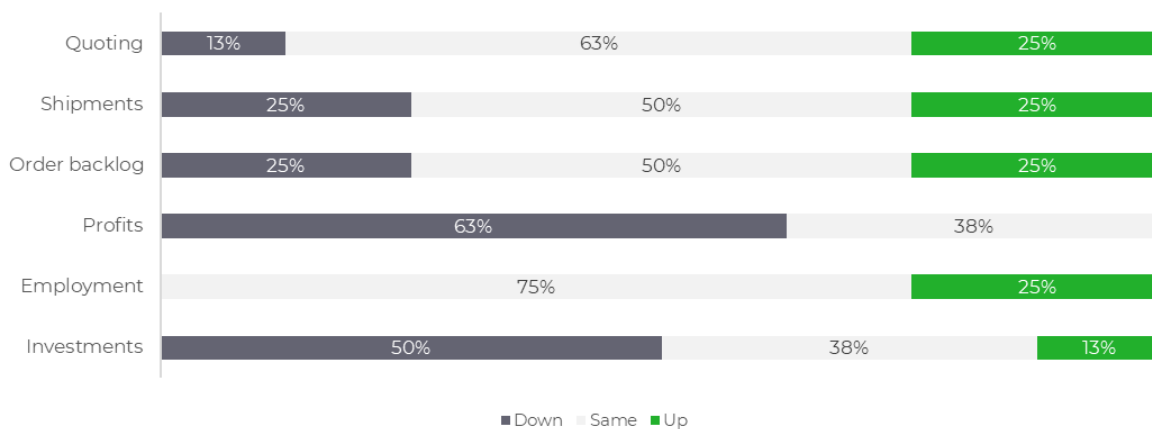
## Czech Republic



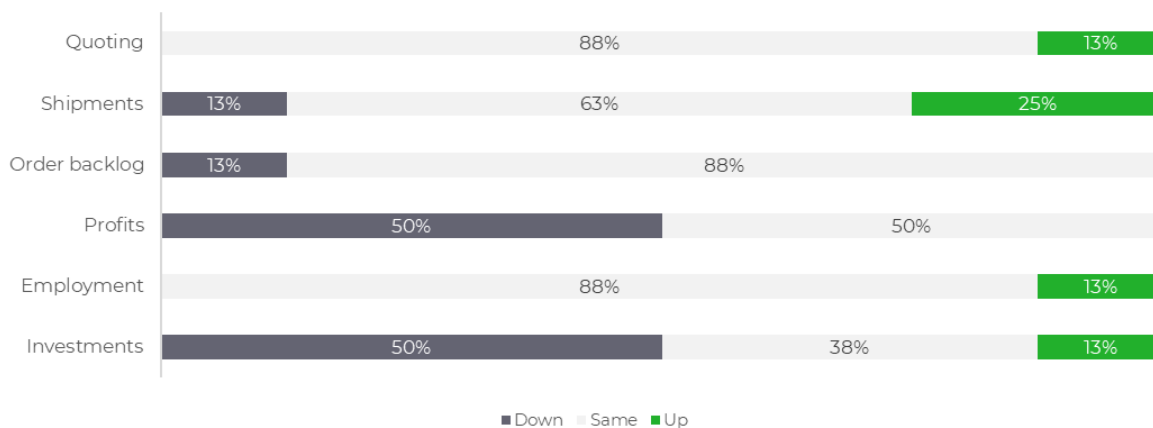
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Estonia



5 answers

### Business profile

#### Main activity

Moulds	100 %
Dies	0 %
Precision Machining	0 %

#### Size (tons)

Small / Medium (< 10 tons)	100 %
Large (> 10 tons)	0 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	0 %
5 - 8 weeks	0 %
9 - 12 weeks	60 %
+ 12 weeks	40 %

### People & work

Total number of skilled employees **111**

#### Current average work week per skilled employee

Until 40 hours	80 %
Between 40 - 50 hours	20 %
Over 50 hours	0 %

#### Number of working shifts

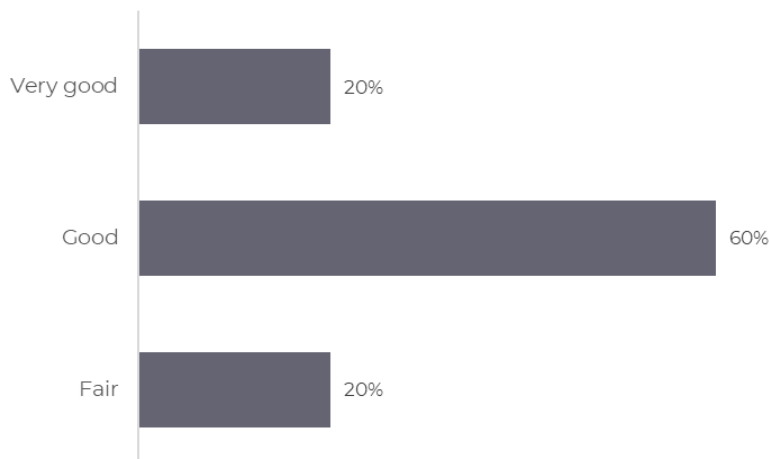
1 shift	60 %
2 shifts	40 %
3 shifts	0 %

# COUNTRY SUMMARY

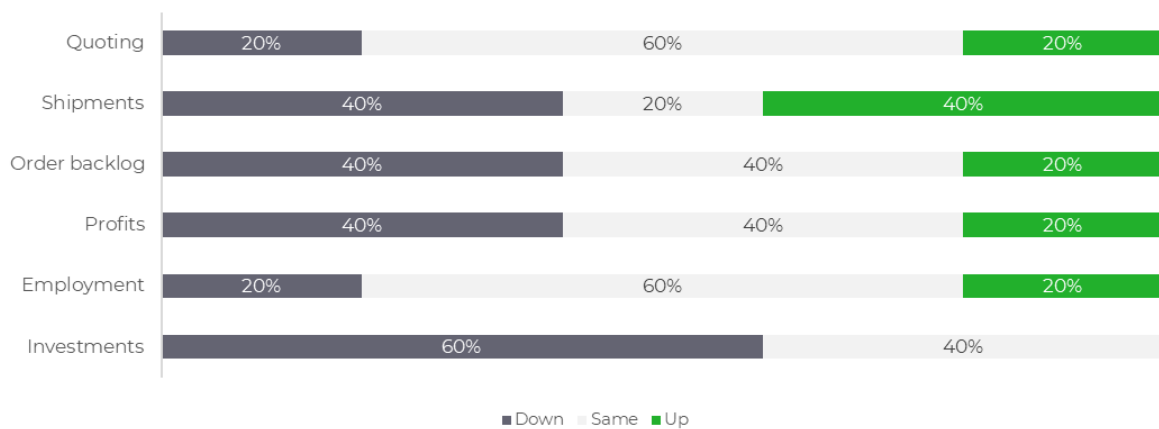
## Estonia



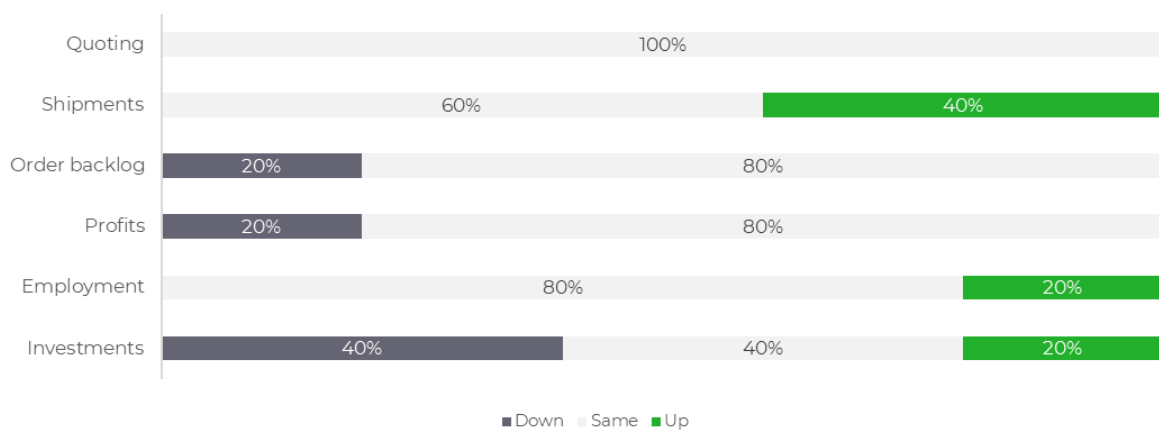
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Finland



5 answers

### Business profile

#### Main activity

Moulds	40 %
Dies	0 %
Precision Machining	60 %

#### Size (tons)

Small / Medium (< 10 tons)	100 %
Large (> 10 tons)	0 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	40 %
5 - 8 weeks	0 %
9 - 12 weeks	40 %
+ 12 weeks	20 %

### People & work

Total number of skilled employees **84**

#### Current average work week per skilled employee

Until 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

#### Number of working shifts

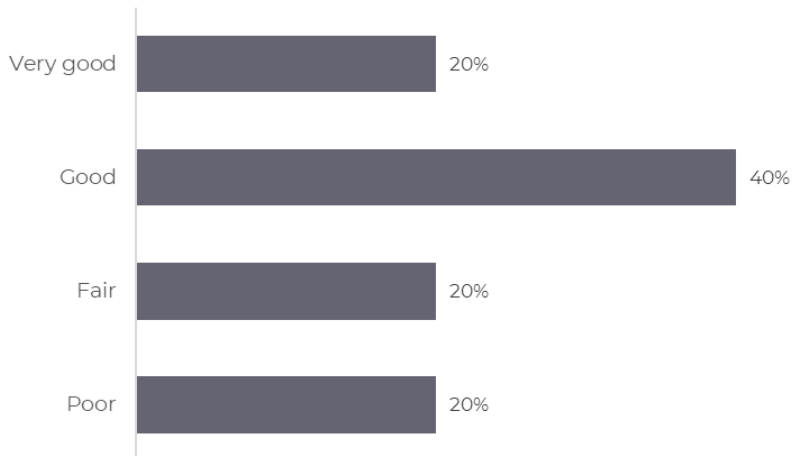
1 shift	20 %
2 shifts	60 %
3 shifts	20 %

# COUNTRY SUMMARY

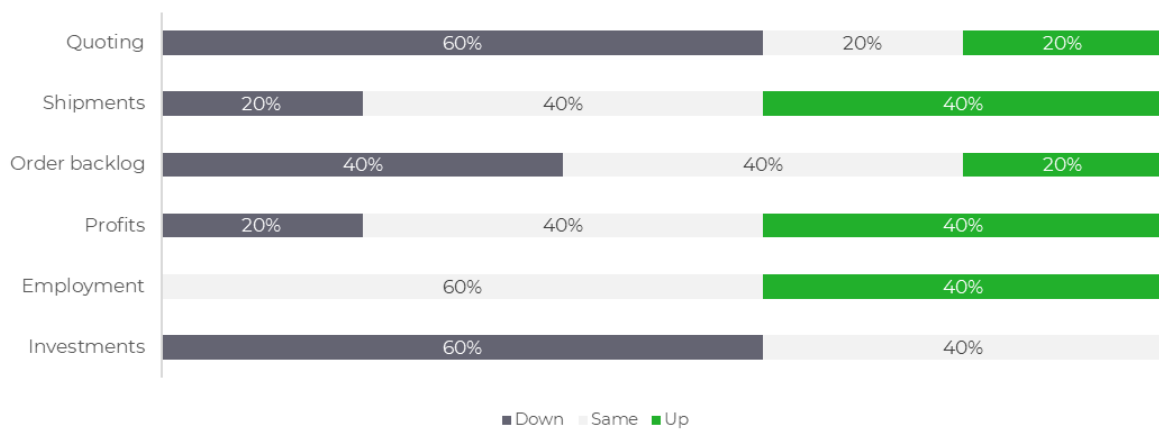
## Finland



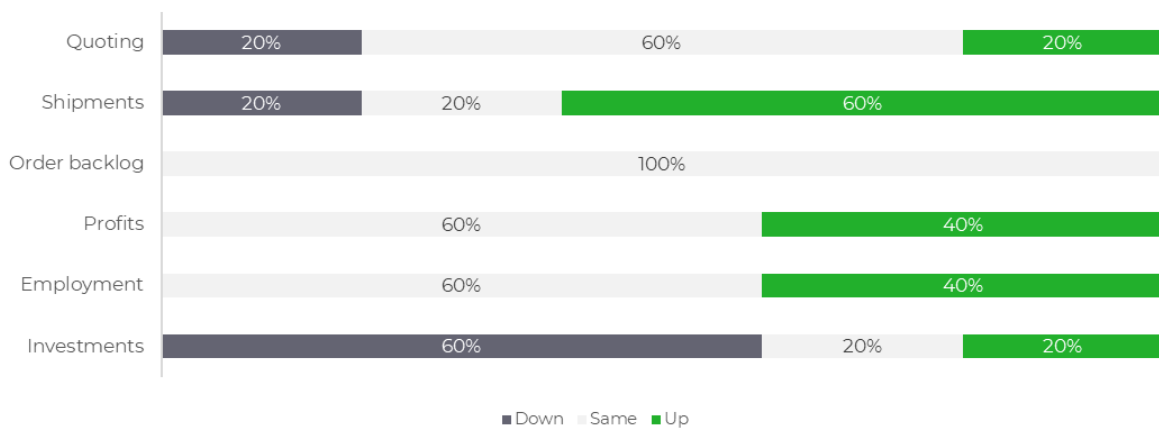
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Germany



13 answers

### Business profile

#### Main activity

Moulds	46 %
Dies	46 %
Precision Machining	8 %

#### Size (tons)

Small / Medium (< 10 tons)	69 %
Large (> 10 tons)	31 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	0 %
5 - 8 weeks	15 %
9 - 12 weeks	38 %
+ 12 weeks	46 %

### People & work

Total number of skilled employees **1 807**

#### Current average work week per skilled employee

Until 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

#### Number of working shifts

1 shift	23 %
2 shifts	69 %
3 shifts	8 %

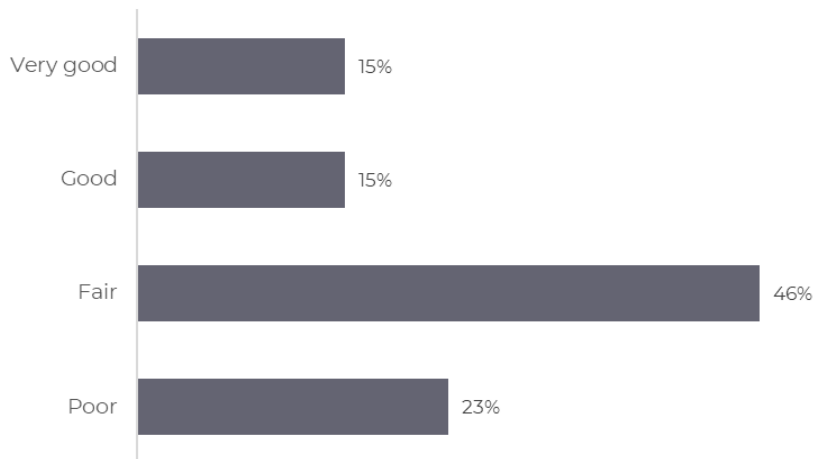


# COUNTRY SUMMARY

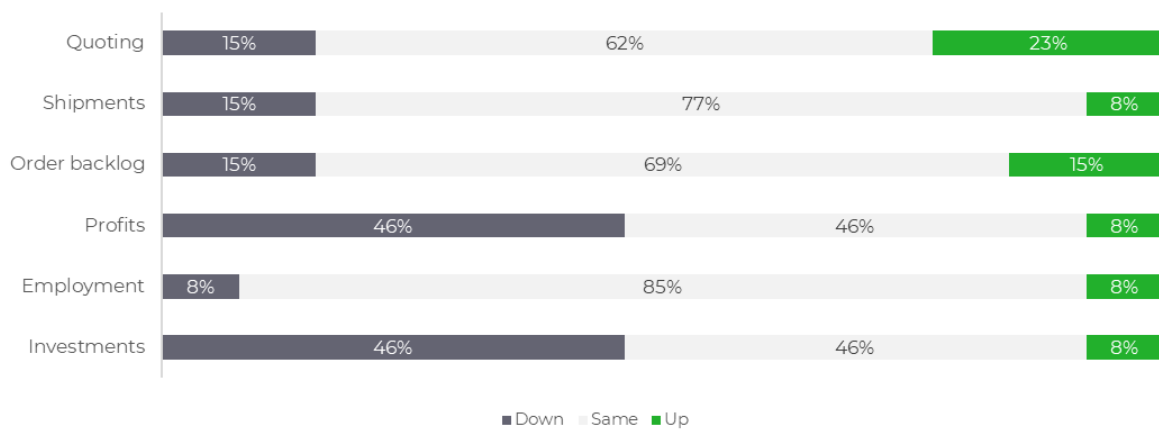
## Germany



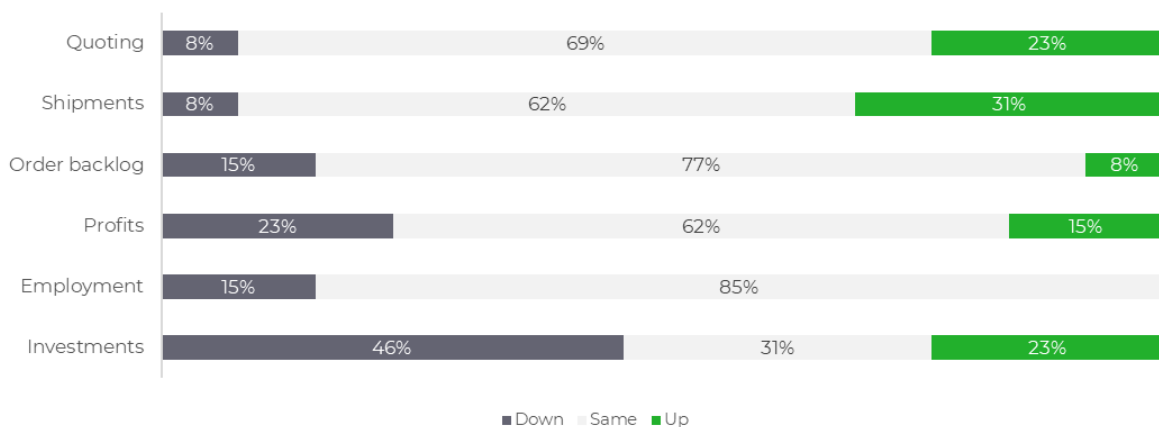
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Italy



### 14 answers Business profile

#### Main activity

Moulds	<b>71 %</b>
Dies	<b>21 %</b>
Precision Machining	<b>7 %</b>

#### Size (tons)

Small / Medium (< 10 tons)	<b>93 %</b>
Large (> 10 tons)	<b>7 %</b>

#### Future work currently on order books (in weeks)

1 - 4 weeks	<b>21 %</b>
5 - 8 weeks	<b>21 %</b>
9 - 12 weeks	<b>29 %</b>
+ 12 weeks	<b>29 %</b>

### People & work

Total number of skilled employees **314**

#### Current average work week per skilled employee

Until 40 hours	<b>71 %</b>
Between 40 - 50 hours	<b>29 %</b>
Over 50 hours	<b>0 %</b>

#### Number of working shifts

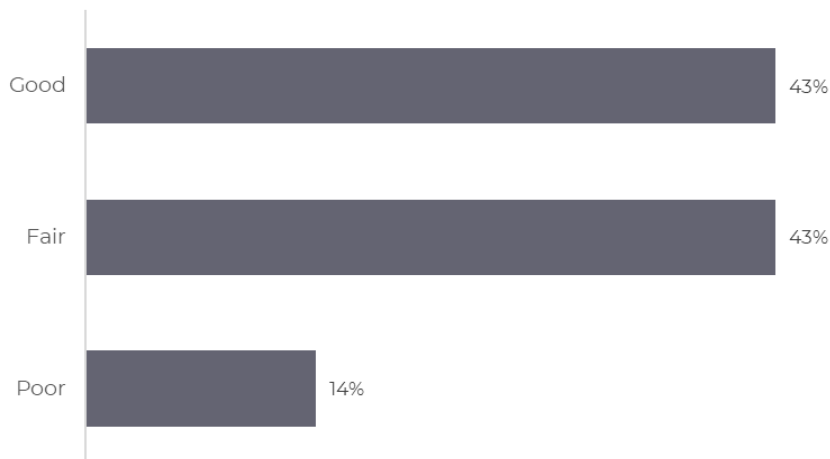
1 shift	<b>79 %</b>
2 shifts	<b>21 %</b>
3 shifts	<b>0 %</b>

# COUNTRY SUMMARY

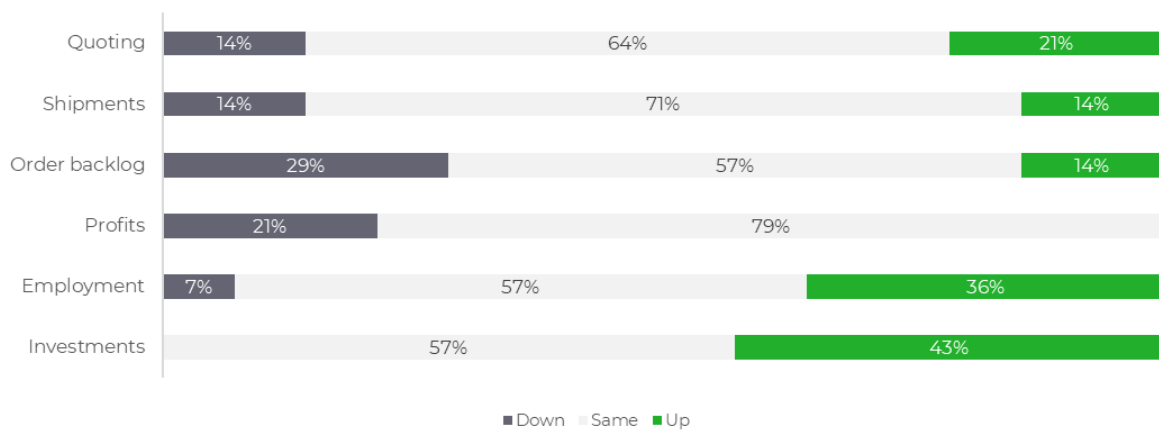
## Italy



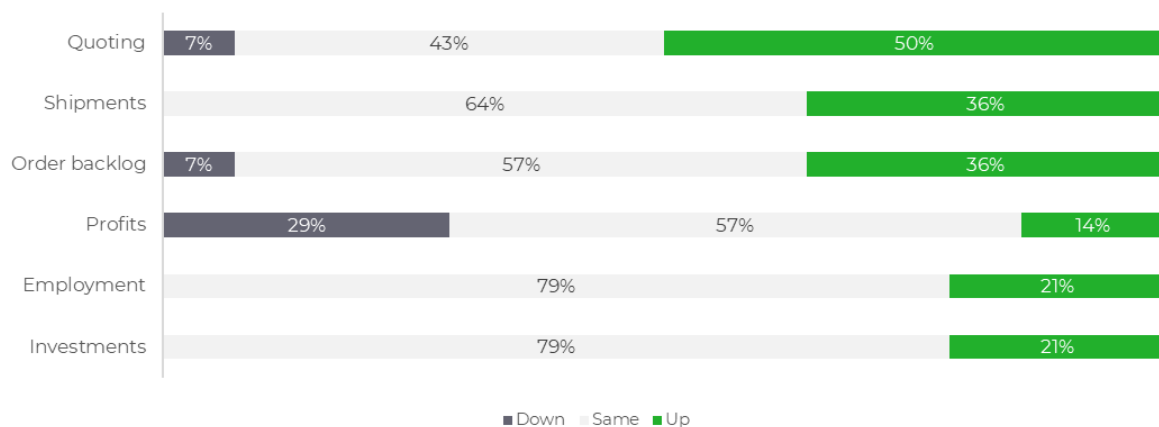
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Japan



31 answers

### Business profile

#### Main activity

Moulds	<b>68 %</b>
Dies	<b>26 %</b>
Precision Machining	<b>6 %</b>

#### Size (tons)

Small / Medium (< 10 tons)	<b>87 %</b>
Large (> 10 tons)	<b>13 %</b>

#### Future work currently on order books (in weeks)

1 - 4 weeks	<b>32 %</b>
5 - 8 weeks	<b>42 %</b>
9 - 12 weeks	<b>23 %</b>
+ 12 weeks	<b>3 %</b>

### People & work

Total number of skilled employees **2 173**

#### Current average work week per skilled employee

Until 40 hours	<b>68 %</b>
Between 40 - 50 hours	<b>32 %</b>
Over 50 hours	<b>0 %</b>

#### Number of working shifts

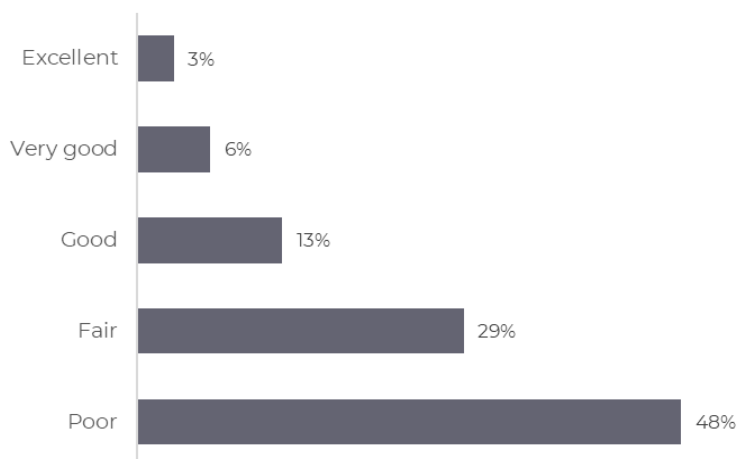
1 shift	<b>81 %</b>
2 shifts	<b>16 %</b>
3 shifts	<b>3 %</b>

# COUNTRY SUMMARY

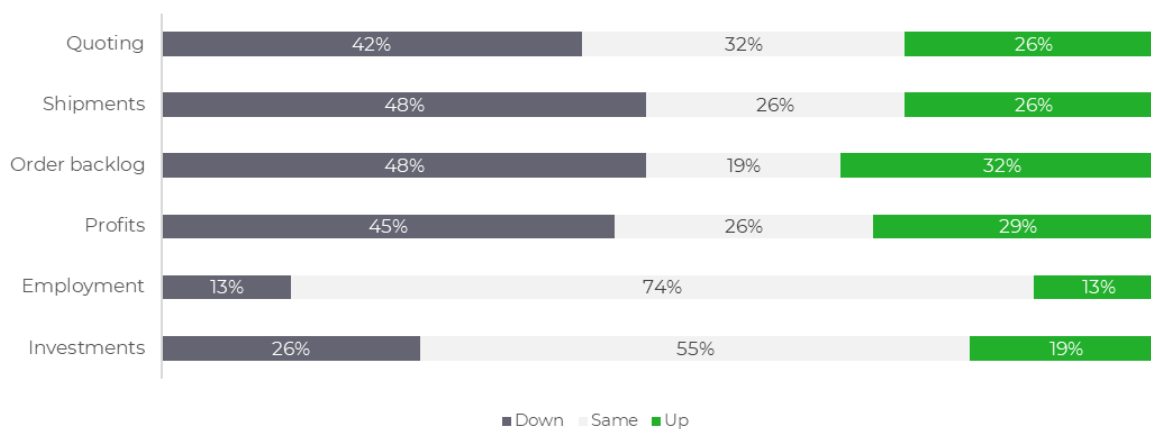
## Japan



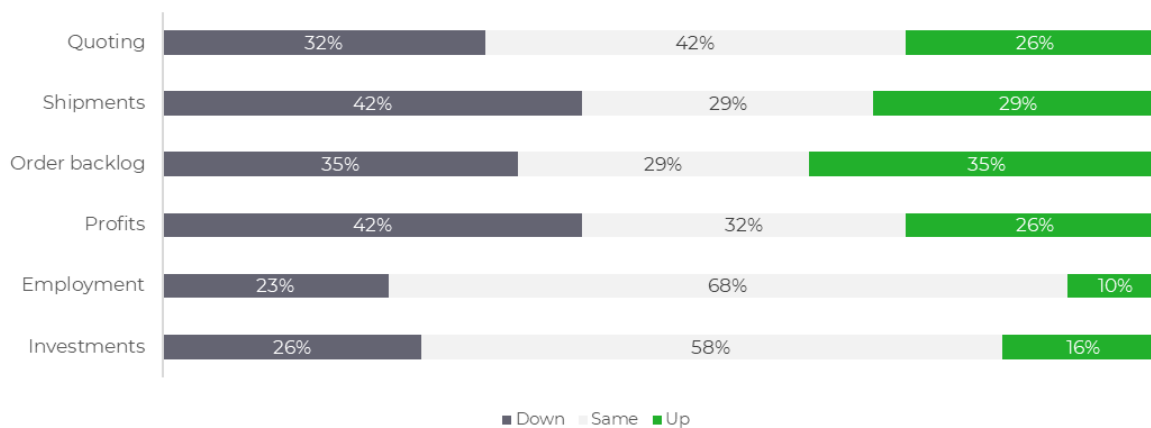
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Mexico



### 20 answers Business profile

#### Main activity

Moulds	60 %
Dies	20 %
Precision Machining	20 %

#### Size (tons)

Small / Medium (< 10 tons)	85 %
Large (> 10 tons)	10 %

1 company didn't provide answer

#### Future work currently on order books (in weeks)

1 - 4 weeks	35 %
5 - 8 weeks	15 %
9 - 12 weeks	25 %
+ 12 weeks	25 %

### People & work

Total number of skilled employees **556**

#### Current average work week per skilled employee

Until 40 hours	20 %
Between 40 - 50 hours	70 %
Over 50 hours	10 %

#### Number of working shifts

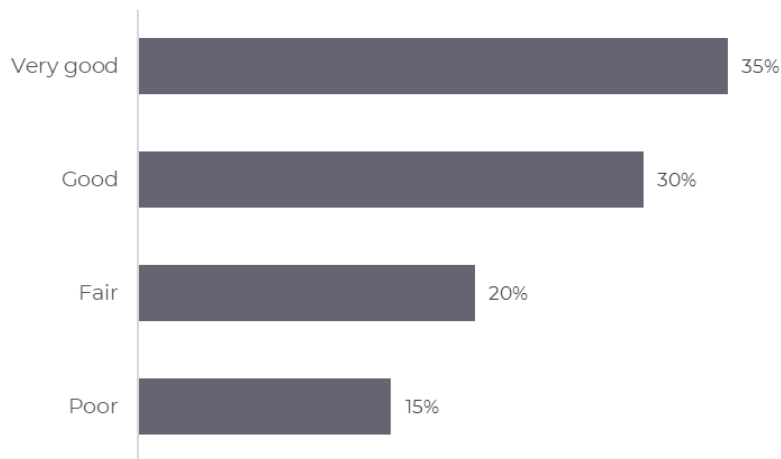
1 shift	50 %
2 shifts	25 %
3 shifts	25 %

# COUNTRY SUMMARY

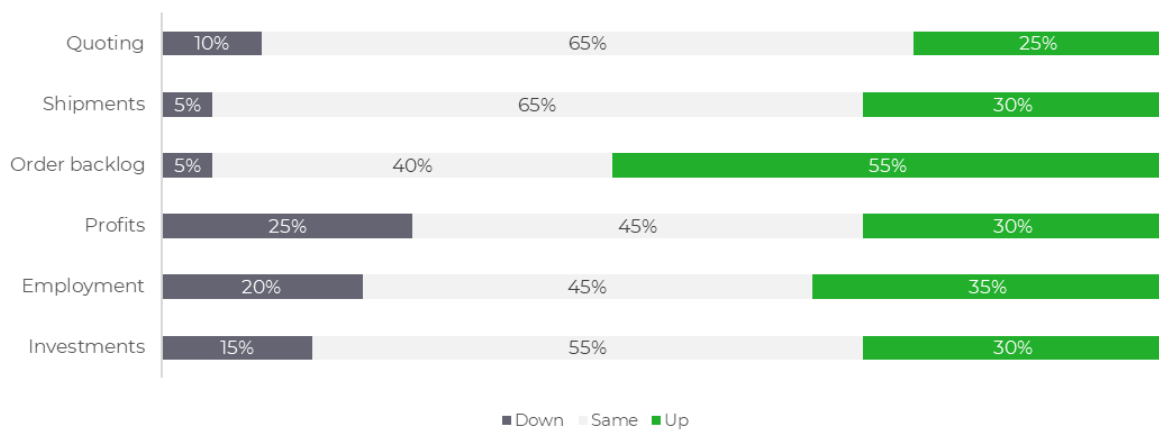
## Mexico



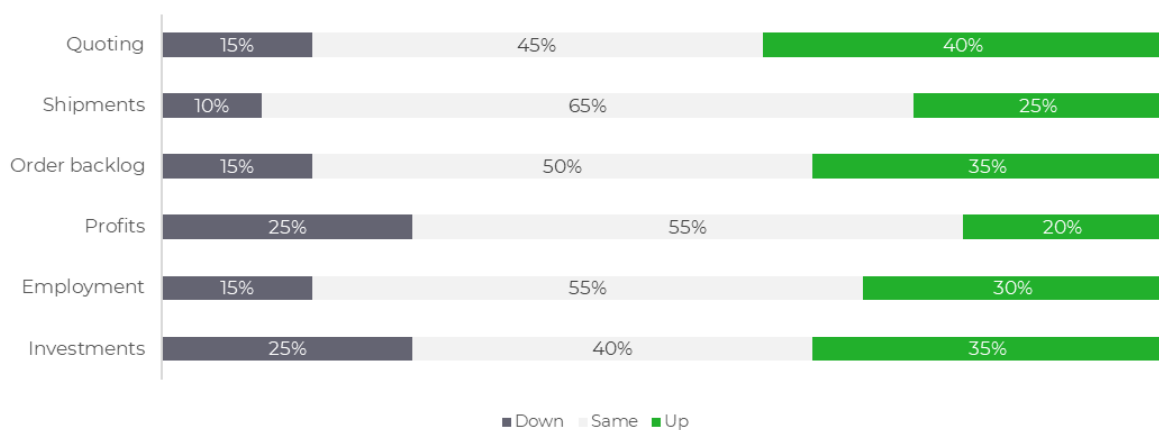
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Portugal



### 16 answers Business profile

#### Main activity

Moulds	94 %
Dies	6 %
Precision Machining	0 %

#### Size (tons)

Small / Medium (< 10 tons)	56 %
Large (> 10 tons)	44 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	0 %
5 - 8 weeks	0 %
9 - 12 weeks	50 %
+ 12 weeks	50 %

### People & work

Total number of skilled employees **2 101**

#### Current average work week per skilled employee

Until 40 hours	75 %
Between 40 - 50 hours	19 %
Over 50 hours	6 %

#### Number of working shifts

1 shift	38 %
2 shifts	38 %
3 shifts	25 %

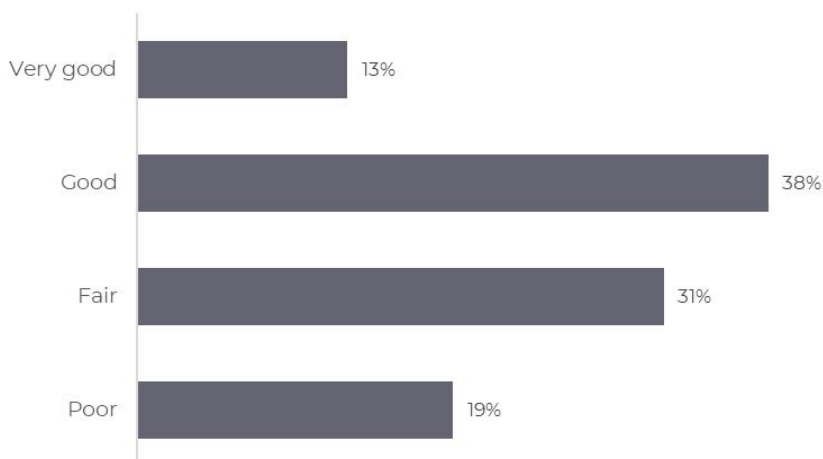


# COUNTRY SUMMARY

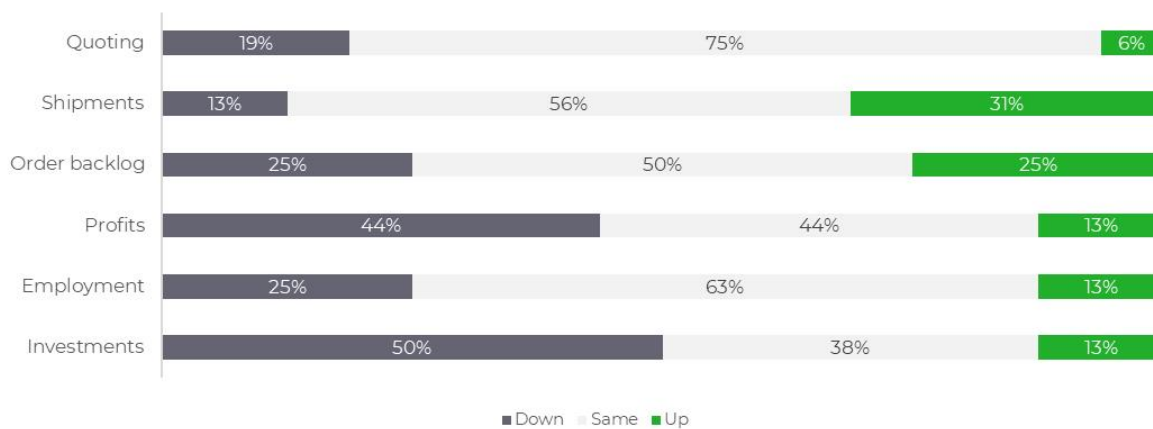
## Portugal



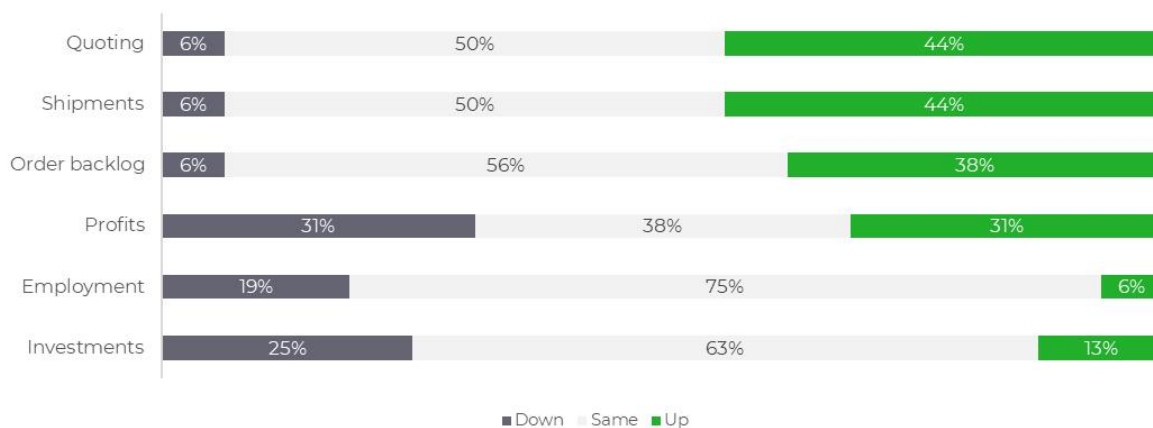
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Slovenia



2 answers

### Business profile

#### Main activity

Moulds	50 %
Dies	50 %
Precision Machining	0 %

#### Size (tons)

Small / Medium (< 10 tons)	100 %
Large (> 10 tons)	0 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	0 %
5 - 8 weeks	50 %
9 - 12 weeks	50 %
+ 12 weeks	0 %

### People & work

Total number of skilled employees **25**

#### Current average work week per skilled employee

Until 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

#### Number of working shifts

1 shift	0 %
2 shifts	100 %
3 shifts	0 %

# COUNTRY SUMMARY

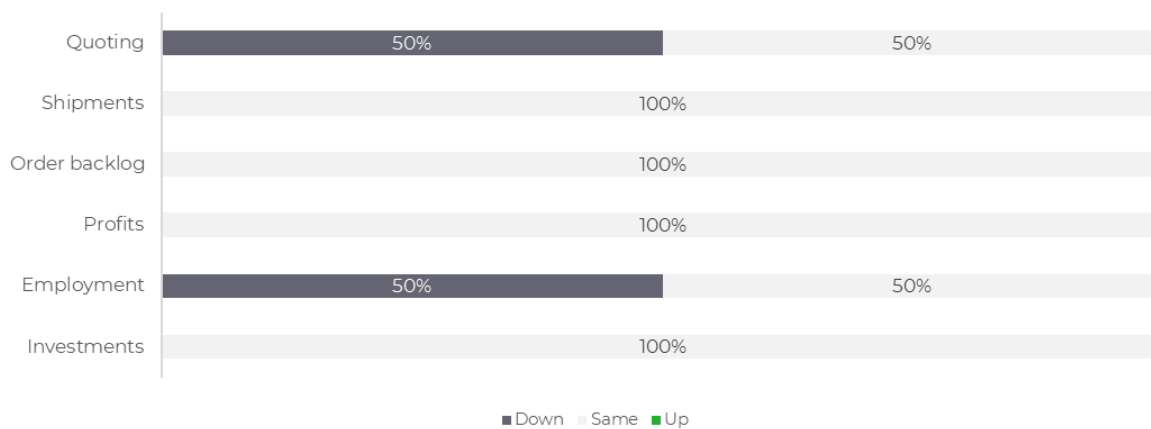
## Slovenia



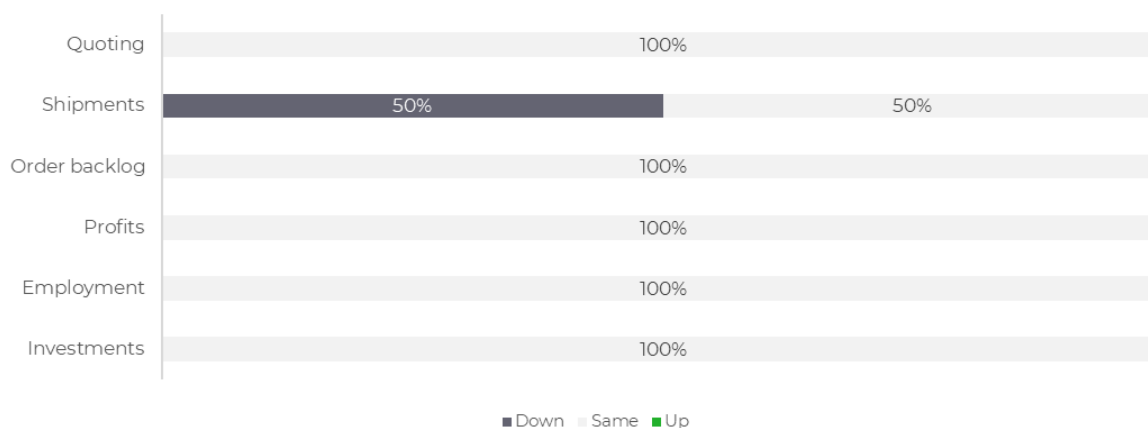
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## South Africa



### 18 answers Business profile

#### Main activity

Moulds	<b>39 %</b>
Dies	<b>0 %</b>
Precision Machining	<b>61 %</b>

#### Size (tons)

Small / Medium (< 10 tons)	<b>78 %</b>
Large (> 10 tons)	<b>22 %</b>

#### Future work currently on order books (in weeks)

1 - 4 weeks	<b>44 %</b>
5 - 8 weeks	<b>33 %</b>
9 - 12 weeks	<b>22 %</b>
+ 12 weeks	<b>0 %</b>

### People & work

Total number of skilled employees **234**

#### Current average work week per skilled employee

Until 40 hours	<b>50 %</b>
Between 40 - 50 hours	<b>50 %</b>
Over 50 hours	<b>0 %</b>

#### Number of working shifts

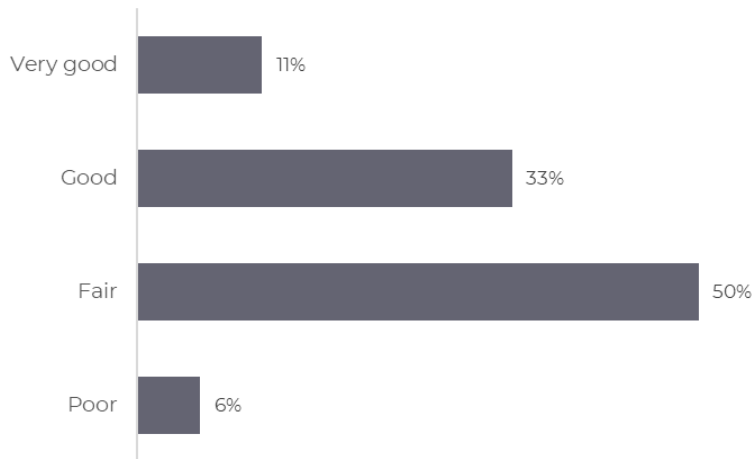
1 shift	<b>72 %</b>
2 shifts	<b>22 %</b>
3 shifts	<b>6 %</b>

# COUNTRY SUMMARY

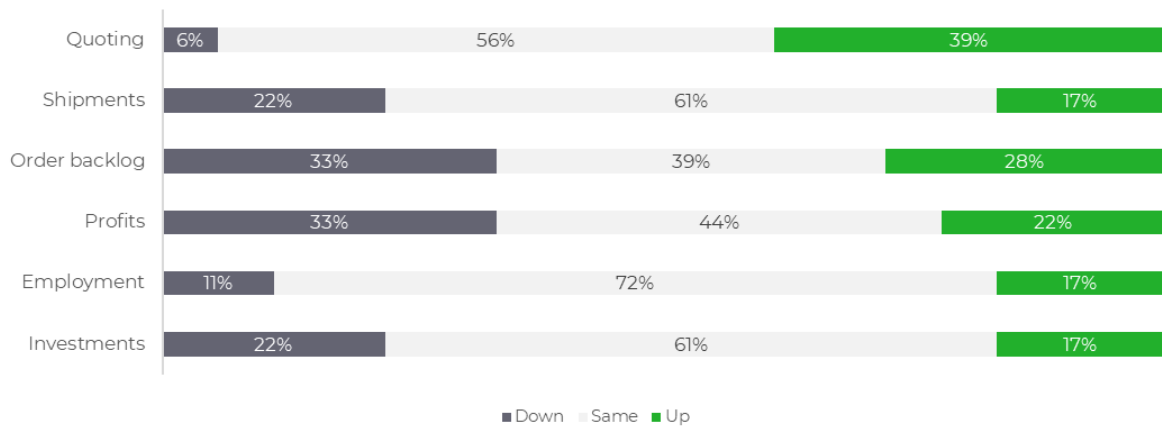
## South Africa



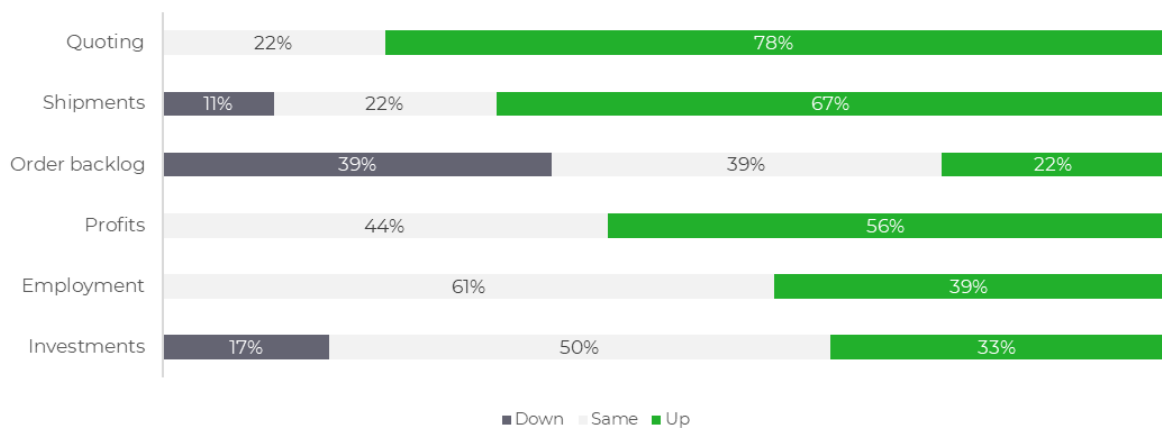
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Switzerland



### 20 answers Business profile

#### Main activity

Moulds	40 %
Dies	20 %
Precision Machining	40 %

#### Size (tons)

Small / Medium (< 10 tons)	90 %
Large (> 10 tons)	0 %

2 companies didn't provide answer

#### Future work currently on order books (in weeks)

1 - 4 weeks	10 %
5 - 8 weeks	30 %
9 - 12 weeks	25 %
+ 12 weeks	35 %

### People & work

Total number of skilled employees **2 417**

#### Current average work week per skilled employee

Until 40 hours	0 %
Between 40 - 50 hours	100 %
Over 50 hours	0 %

#### Number of working shifts

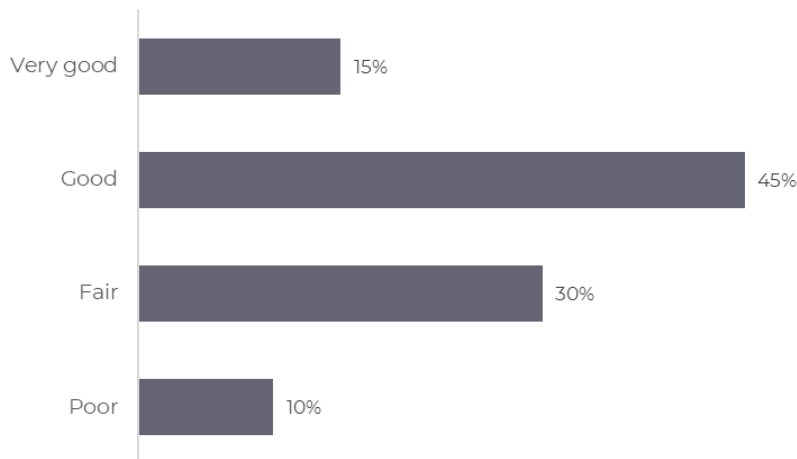
1 shift	80 %
2 shifts	15 %
3 shifts	5 %

# COUNTRY SUMMARY

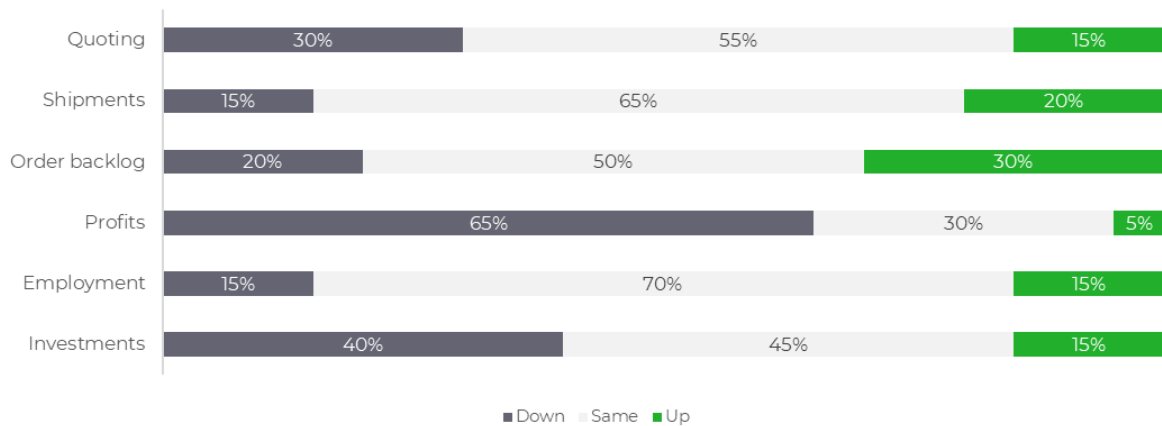
## Switzerland



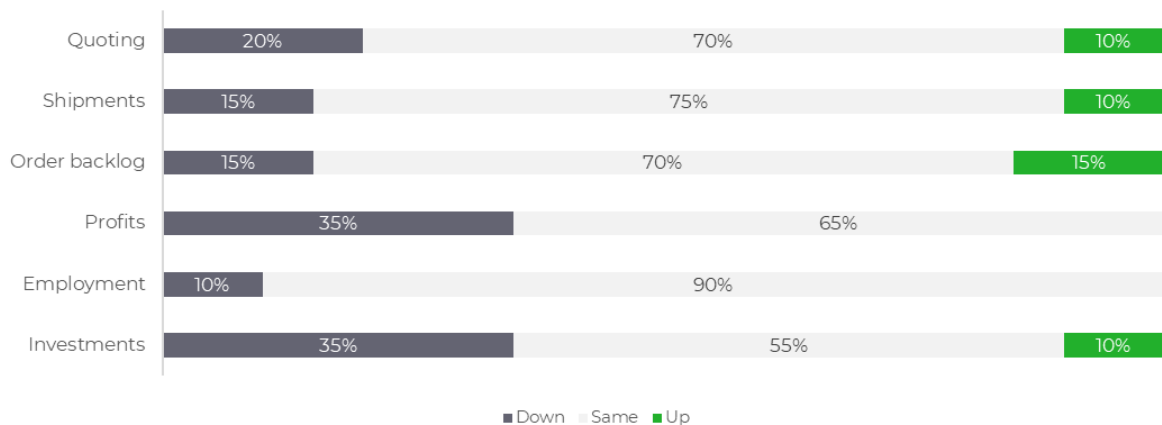
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## Turkey



4 answers

### Business profile

#### Main activity

Moulds	50 %
Dies	50 %
Precision Machining	0 %

#### Size (tons)

Small / Medium (< 10 tons)	0 %
Large (> 10 tons)	100 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	25 %
5 - 8 weeks	0 %
9 - 12 weeks	50 %
+ 12 weeks	25 %

### People & work

Total number of skilled employees **822**

#### Current average work week per skilled employee

Until 40 hours	0 %
Between 40 - 50 hours	75 %
Over 50 hours	25 %

#### Number of working shifts

1 shift	25 %
2 shifts	0 %
3 shifts	75 %

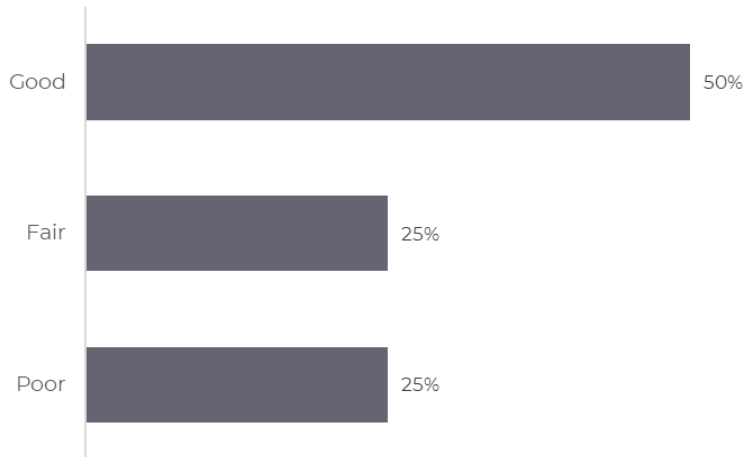


# COUNTRY SUMMARY

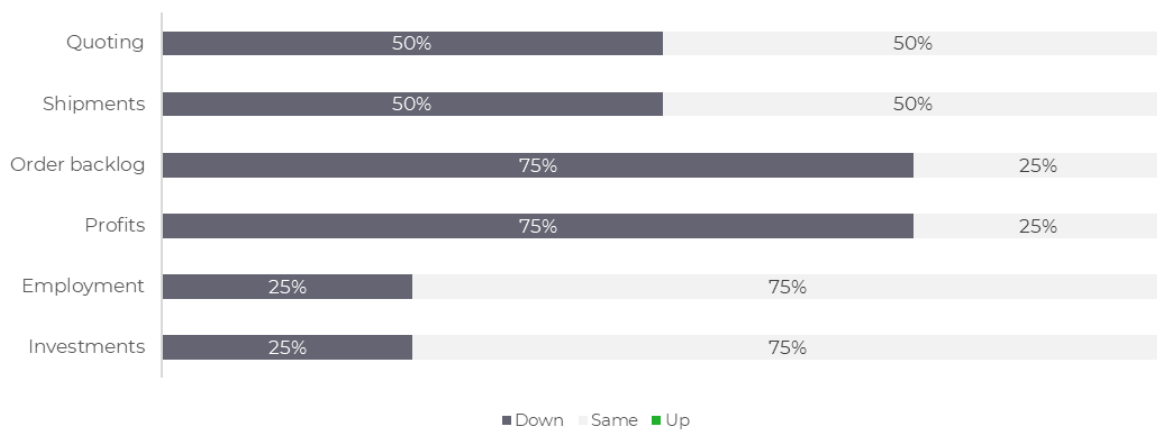
## Turkey



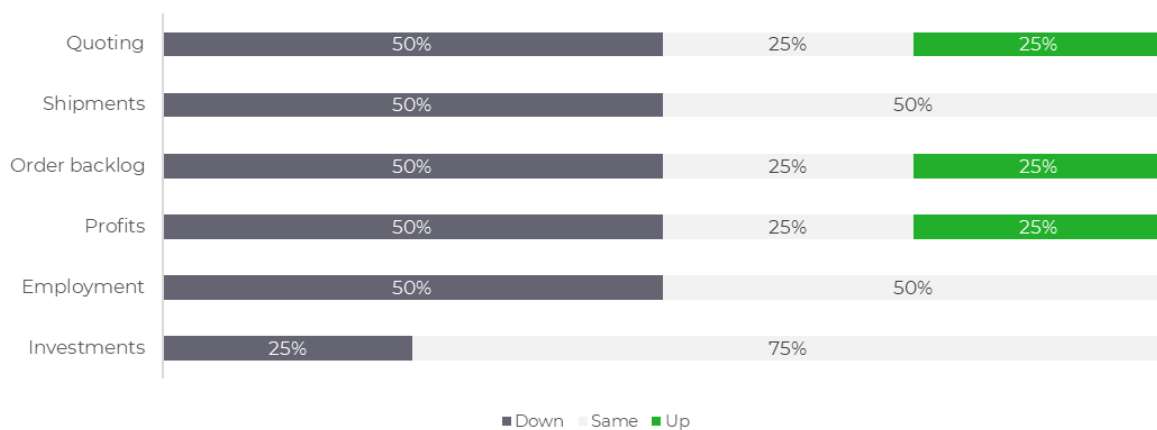
### Current business conditions



### Compared with last semester



### Projected business conditions over six months



# COUNTRY SUMMARY

## United Kingdom



### Answer Business profile

#### Main activity

Moulds	100 %
Dies	0 %
Precision Machining	0 %

#### Size (tons)

Small / Medium (< 10 tons)	0 %
Large (> 10 tons)	100 %

#### Future work currently on order books (in weeks)

1 - 4 weeks	0 %
5 - 8 weeks	0 %
9 - 12 weeks	100 %
+ 12 weeks	0 %

### People & work

Total number of skilled employees **200**

#### Current average work week per skilled employee

Until 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

#### Number of working shifts

1 shift	100 %
2 shifts	0 %
3 shifts	0 %

# COUNTRY SUMMARY

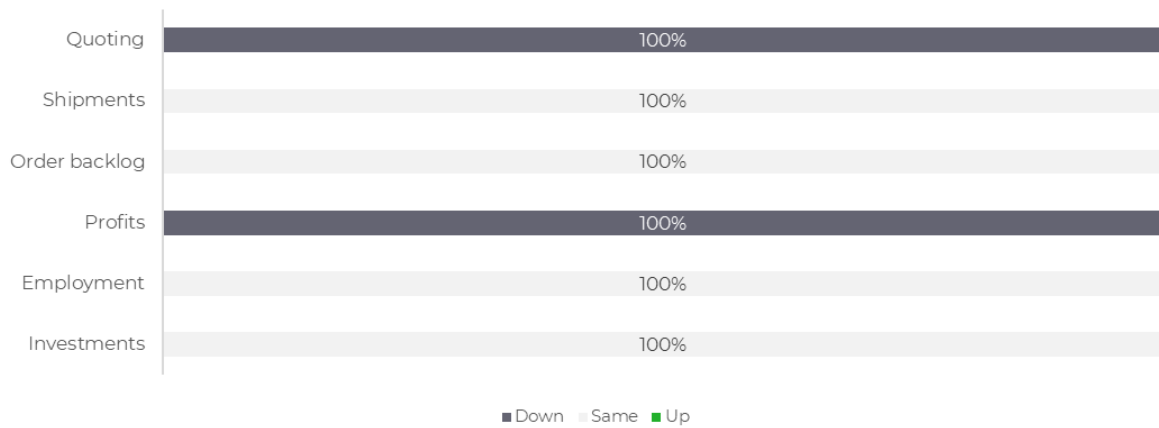
United Kingdom



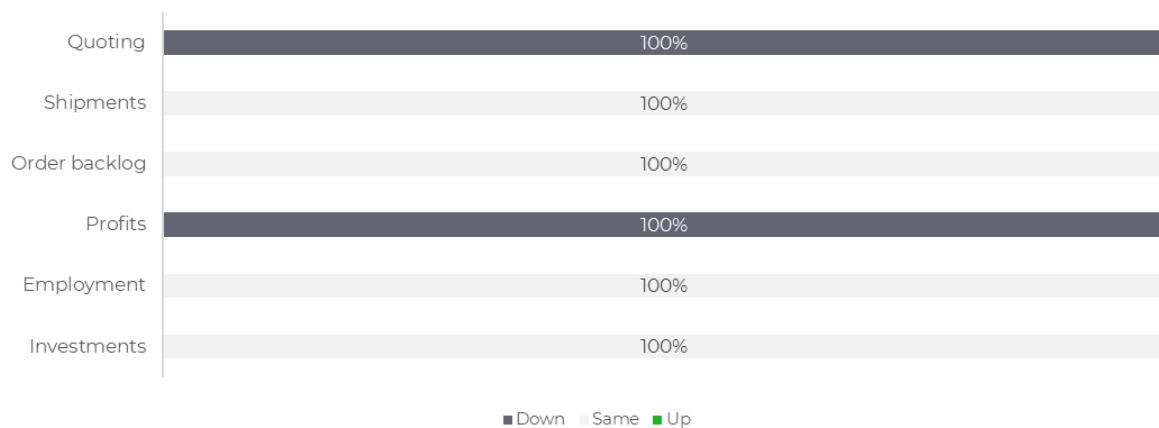
## Current business conditions



## Compared with last semester



## Projected business conditions over six months



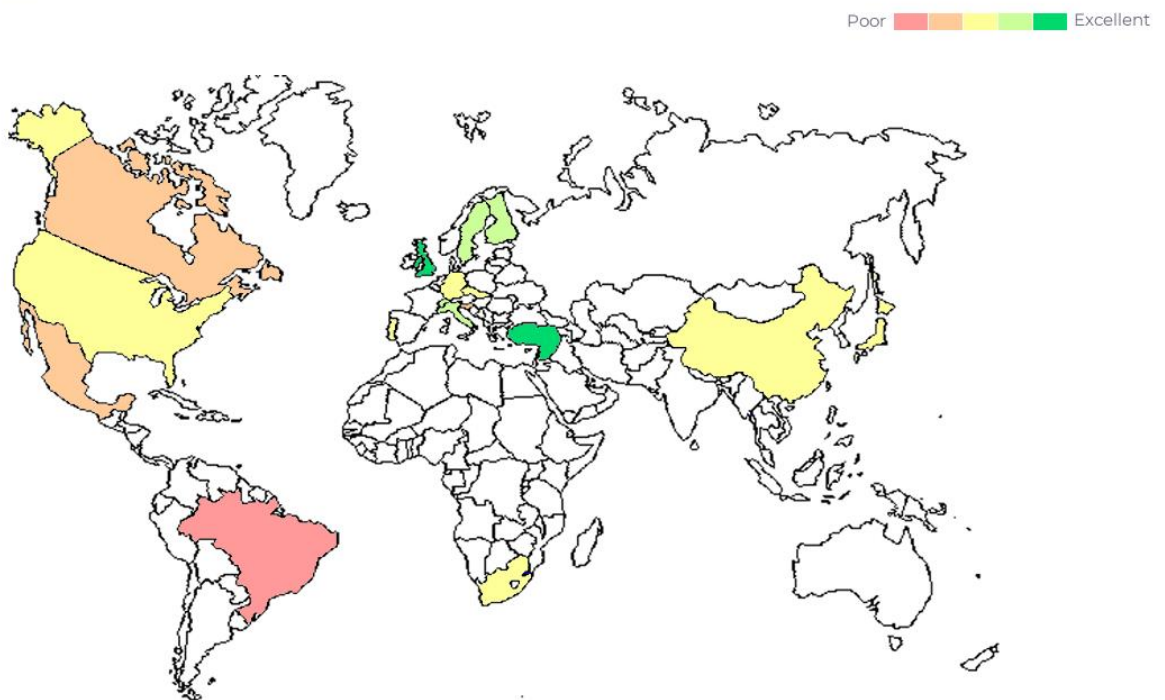
# GLOBAL PARTNER SUMMARY

DMG MORI

# DMG MORI

## Mouldmaking

Current business conditions



Business conditions forecast



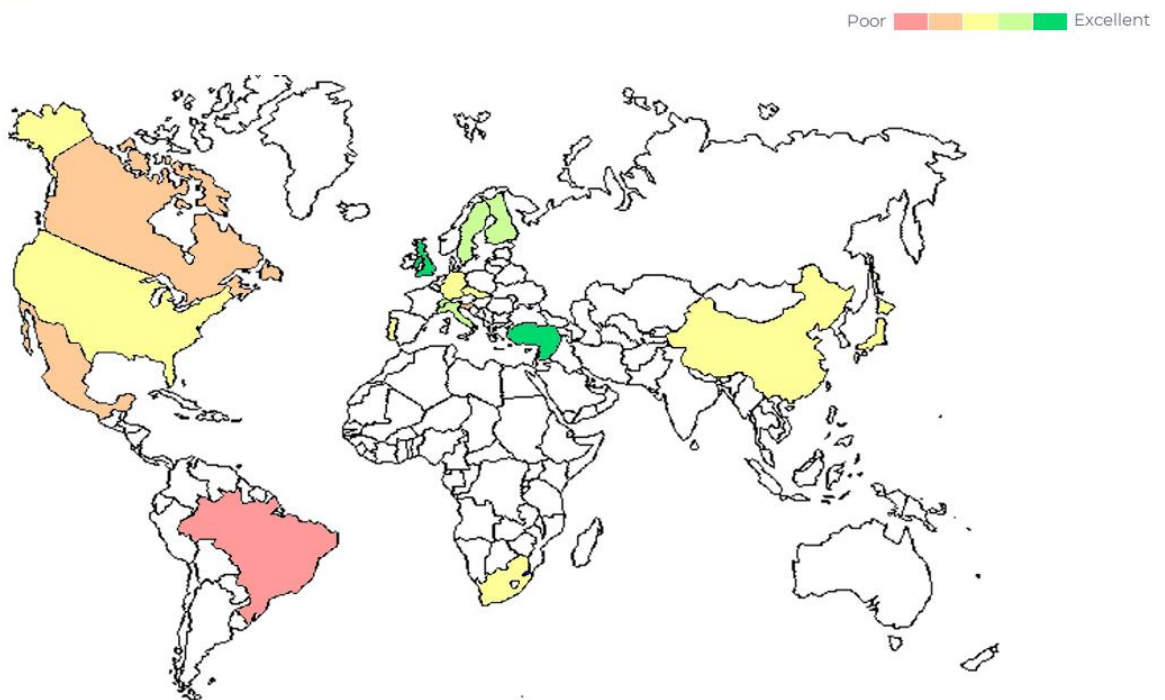
# GLOBAL PARTNER SUMMARY

DMG MORI

# DMG MORI

Die making

Current business conditions



Business conditions forecast







# GLOBAL PARTNER SUMMARY

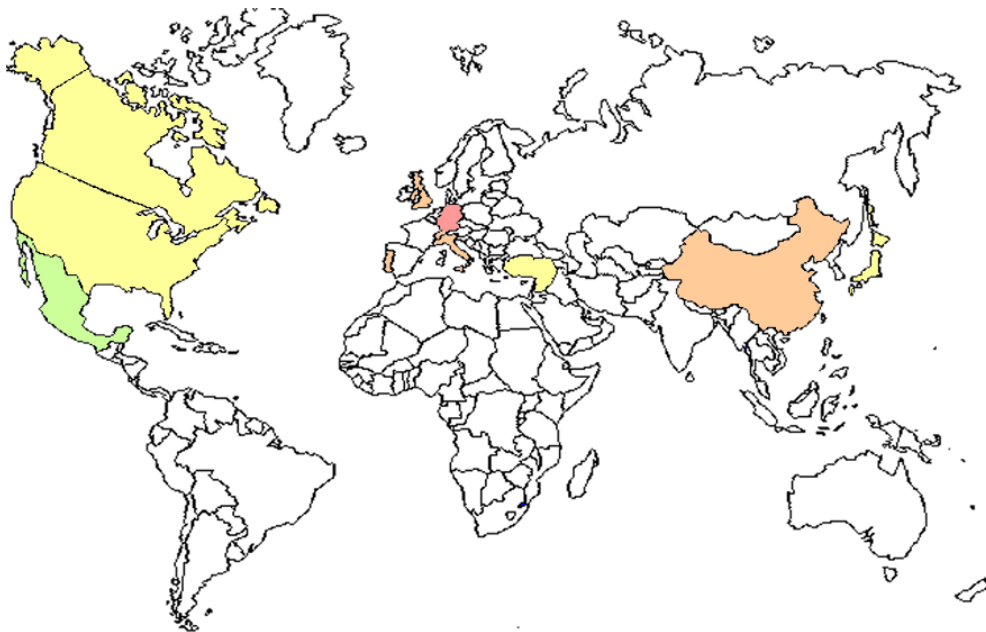
Makino

Mouldmaking



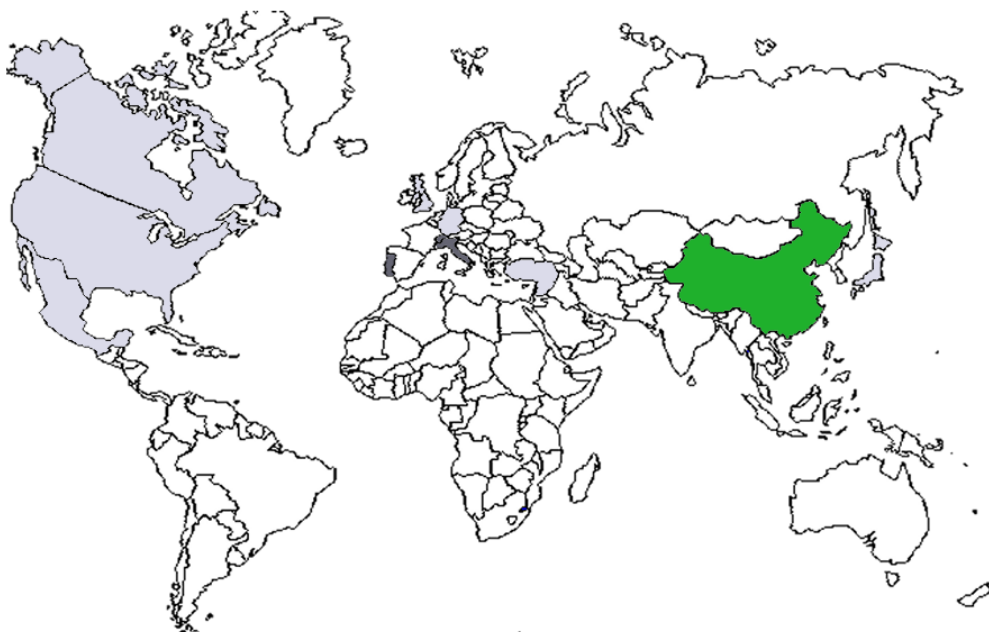
Current business conditions

Poor     Excellent



Business conditions forecast

Down   Up 



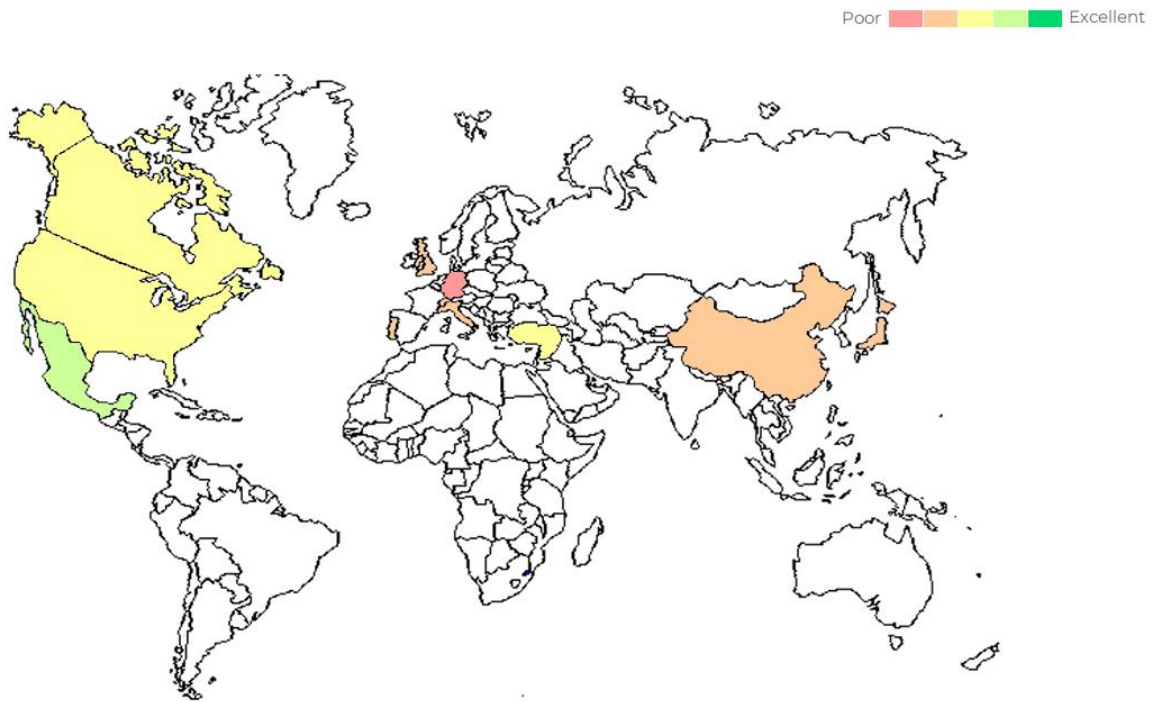
# GLOBAL PARTNER SUMMARY

Makino

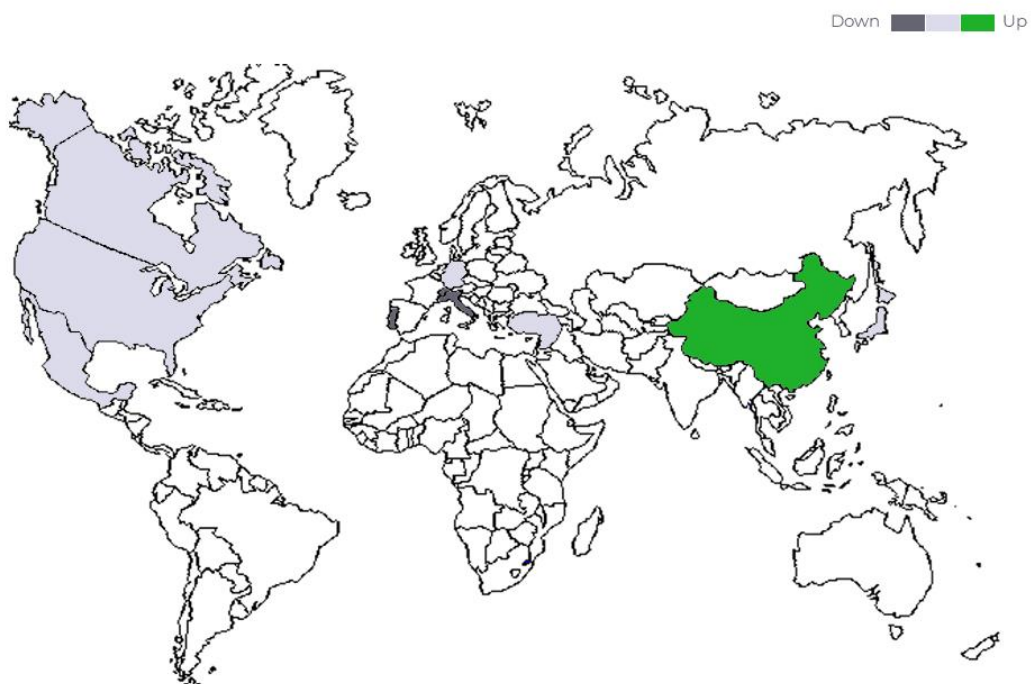
Die making



Current business conditions



Business conditions forecast



# GLOBAL PARTNER SUMMARY

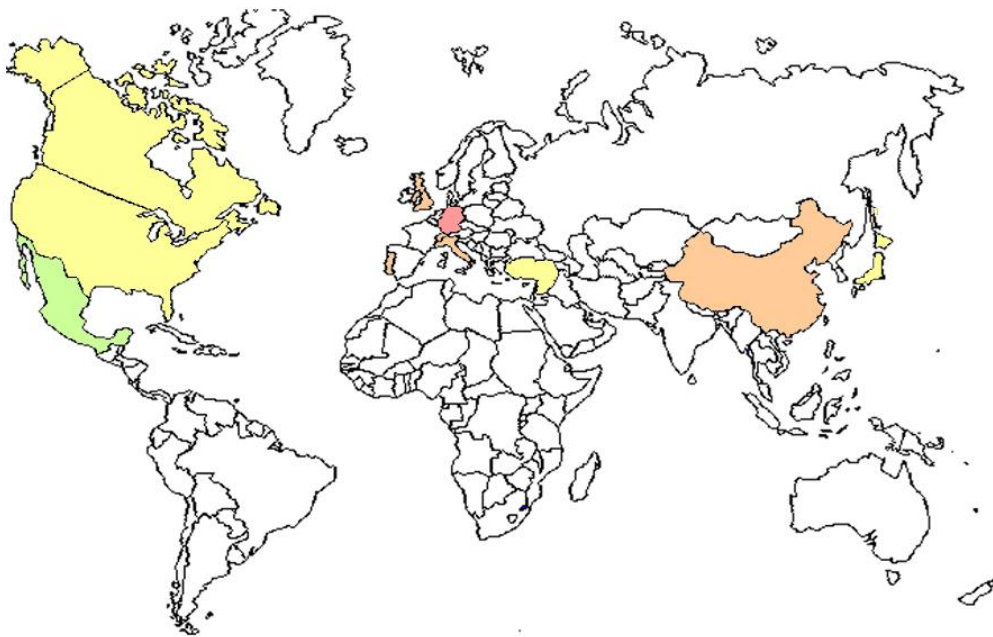
Makino

Precision Machining



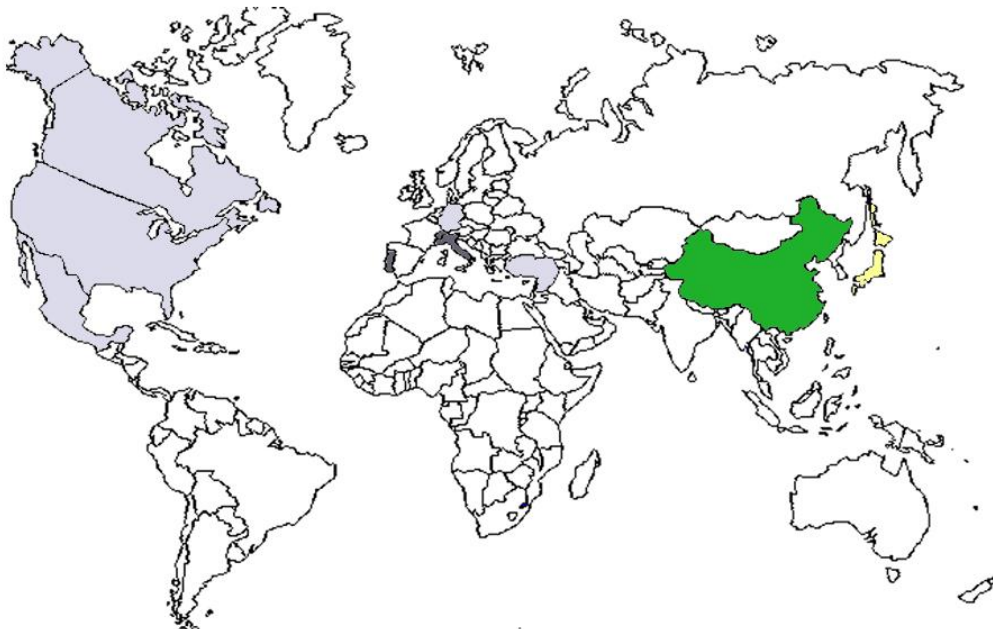
Current business conditions

Poor Excellent



Business conditions forecast

Down Up





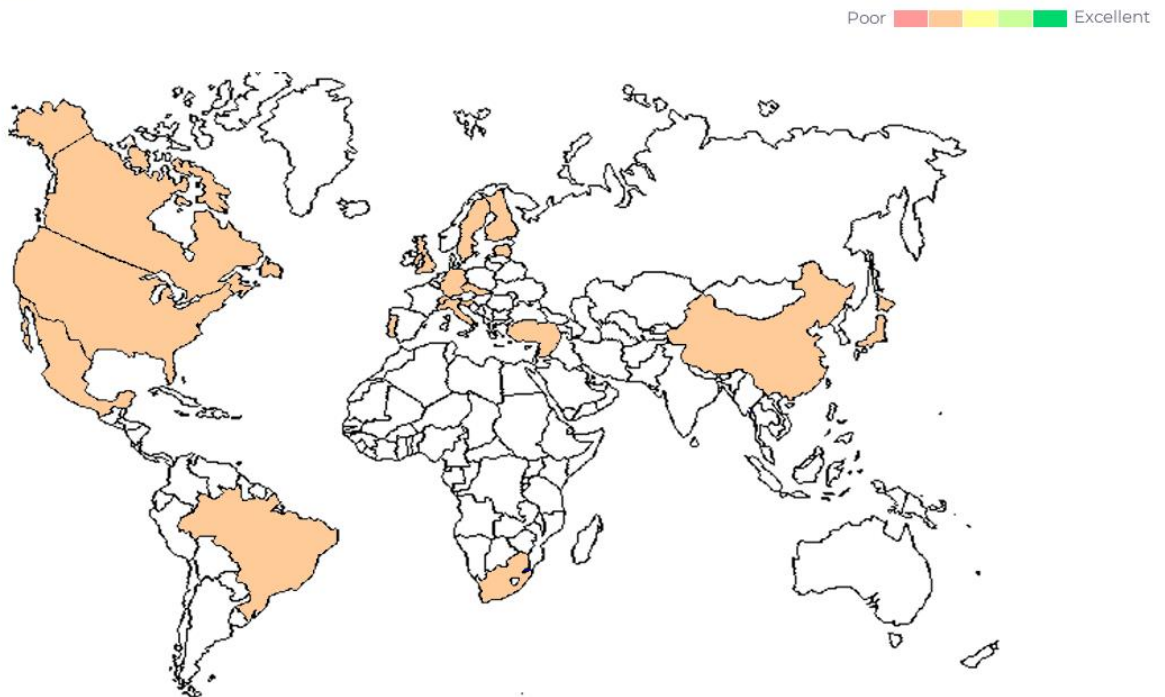
# GLOBAL PARTNER SUMMARY

Oerlikon HRSflow

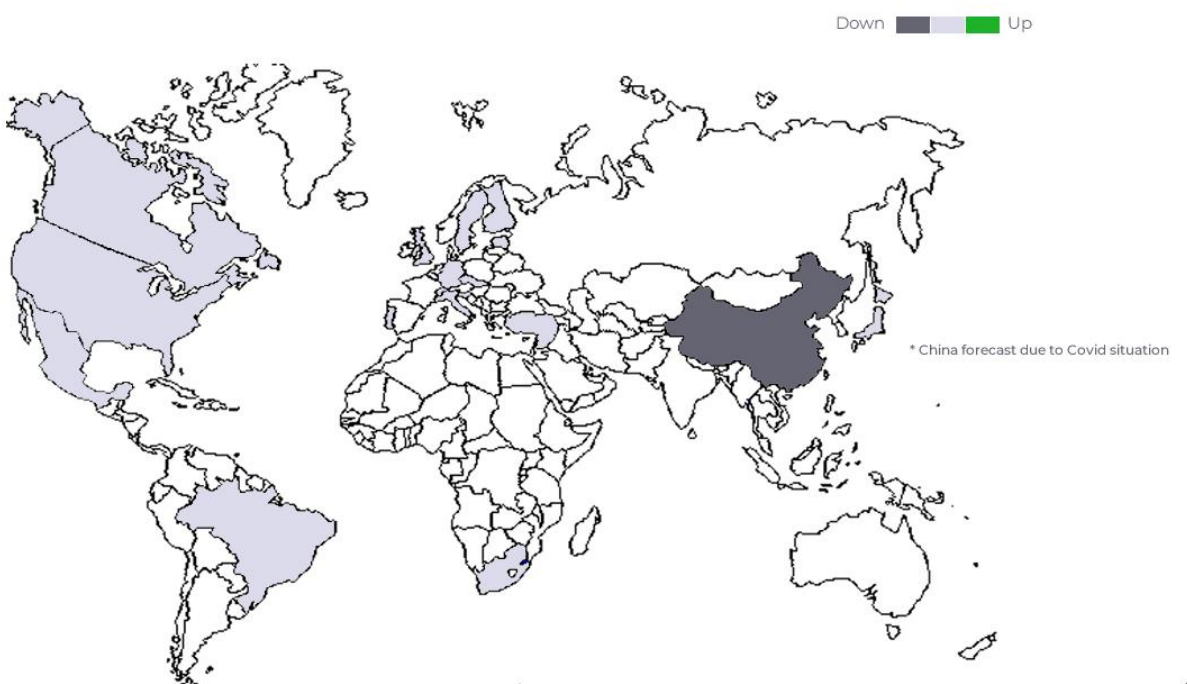
Mouldmaking



Current business conditions



Business conditions forecast





# **ISTMA**

International Special Tooling and Machining Association