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BUSINESS CONDITIONS REPORT

For six-month period ending
December 31st, 2024

*Results compiled by:
ISTMA World Secretariat
February 27th, 2024*

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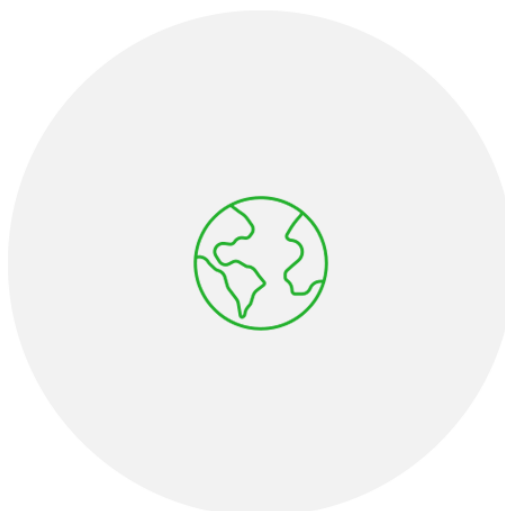
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GLOBAL SUMMARY

17 Countries

Brazil
Canada
Czech Republic
Estonia
Finland
Germany
Italy
Japan
Mexico

Poland
Portugal
Slovenia
South Africa
Spain
Switzerland
Turkey
United Kingdom



234 answers Business profile



Main activity

Moulds	56 %
Dies	19 %
Precision Machining	24 %

Size (tons)

Small / Medium (<10 tons)	75 %
Large (> 10 tons)	22 %
Blank answers	3 %

Future work currently on order books (in weeks)

1 - 4 weeks	26 %
5 - 8 weeks	29 %
9 - 12 weeks	18 %
+ 12 weeks	26 %

GLOBAL SUMMARY

People & work

Total number of skilled employees **14 094**

Current average work week per skilled employee

Until 40 hours **56 %**

Between 40 - 50 hours **40 %**

Over 50 hours **5 %**



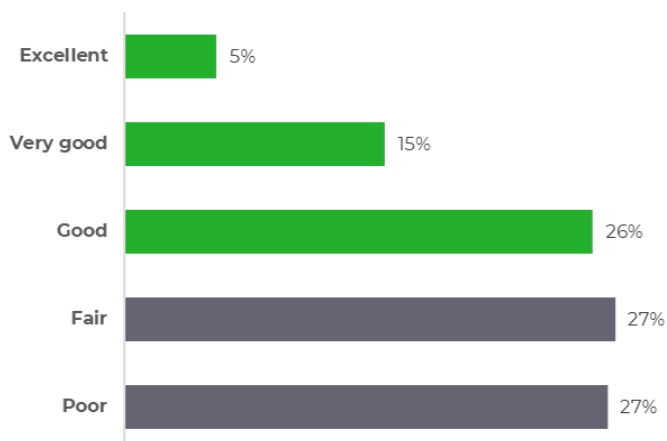
Number of working shifts

1 shift **57 %**

2 shifts **31 %**

3 shifts **12 %**

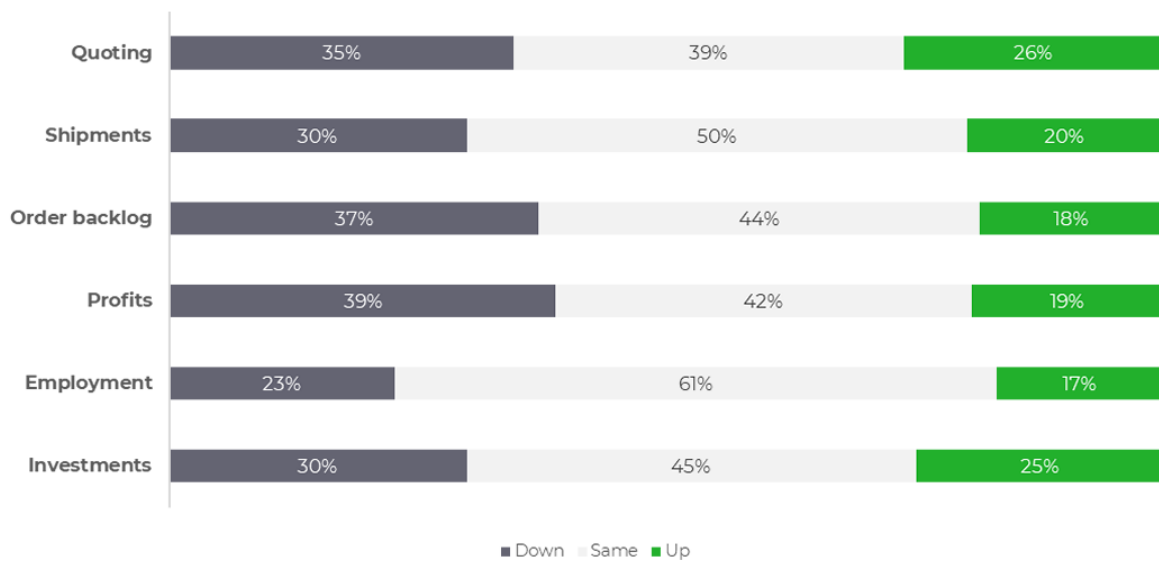
Current business conditions



GLOBAL SUMMARY

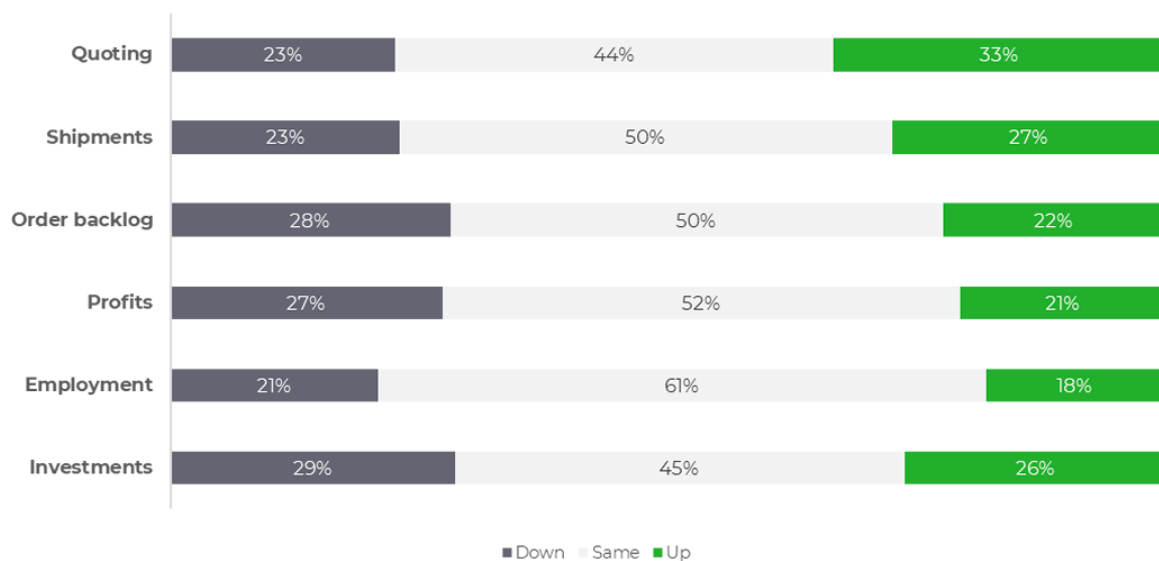
Current business conditions

Compared with last semester



Projected business conditions

Over six months



COUNTRY SUMMARY

Brazil



28 answers Business profile

Main activity

Moulds	79 %
Dies	18 %
Precision Machining	4 %

Size (tons)

Small / Medium (< 10 tons)	43 %
Large (> 10 tons)	50 %

Blank or invalid answers

7 %

Future work currently on order books (in weeks)

1 - 4 weeks	21 %
5 - 8 weeks	18 %
9 - 12 weeks	29 %
+ 12 weeks	32 %

People & work

Total number of skilled employees **1 584**

Current average work week per skilled employee

Up to 40 hours	14 %
Between 40 - 50 hours	86 %
Over 50 hours	0 %

Number of working shifts

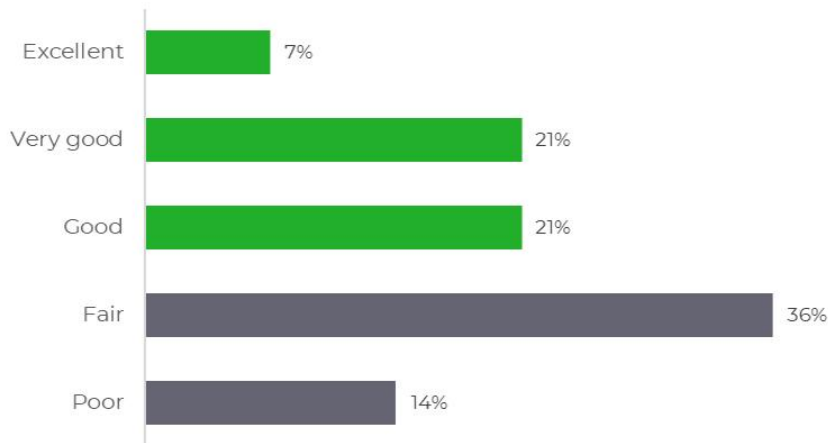
1 shift	32 %
2 shifts	54 %
3 shifts	14 %

COUNTRY SUMMARY

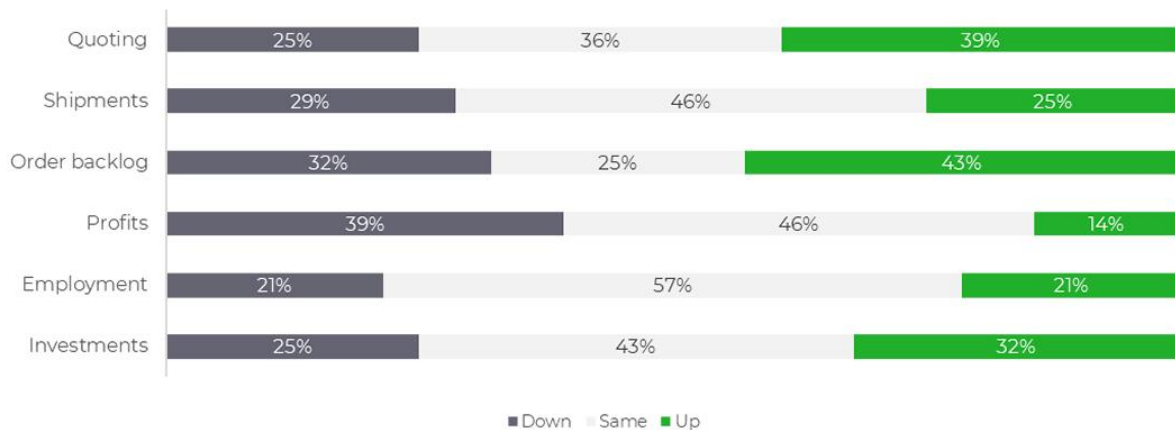
Brazil



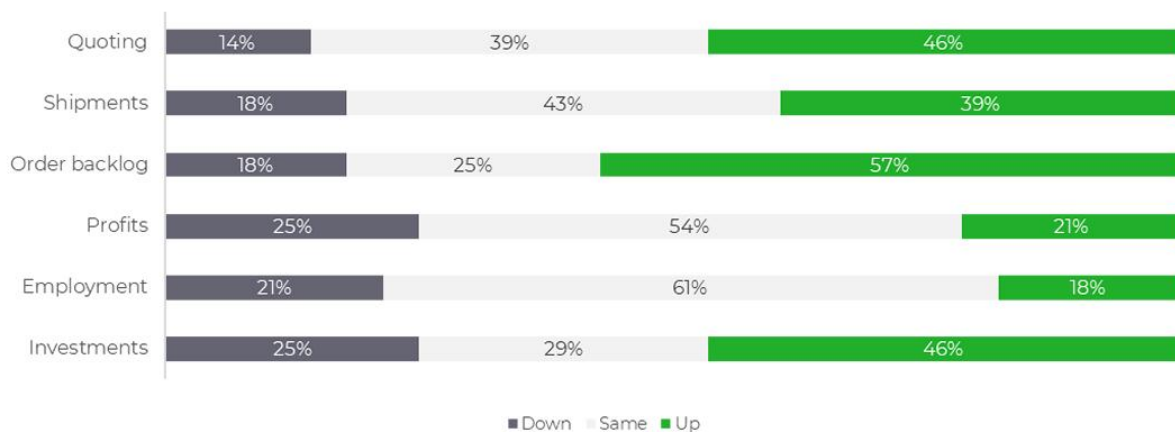
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Canada



20 answers Business profile

Main activity

Moulds	30 %
Dies	25 %
Precision Machining	45 %

Size (tons)

Small / Medium (< 10 tons)	50 %
Large (> 10 tons)	35 %

Blank or invalid answers

15 %

Future work currently on order books (in weeks)

1 - 4 weeks	15 %
5 - 8 weeks	25 %
9 - 12 weeks	10 %
+ 12 weeks	50 %

People & work

Total number of skilled employees **1 402**

Current average work week per skilled employee

Up to 40 hours	60 %
Between 40 - 50 hours	25 %
Over 50 hours	15 %

Number of working shifts

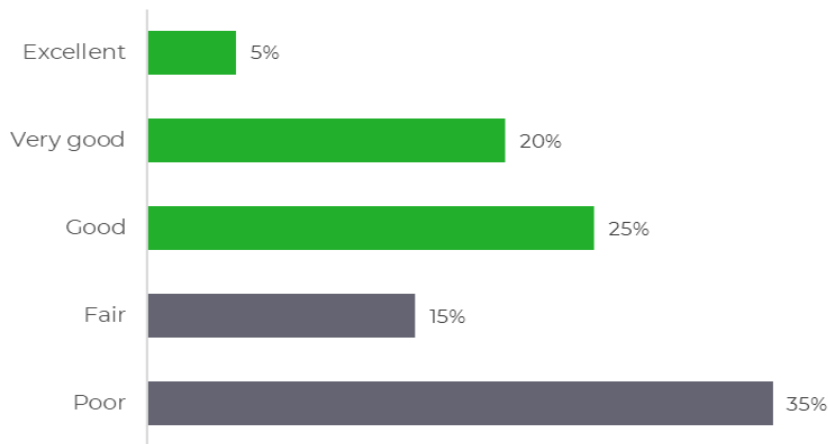
1 shift	30 %
2 shifts	45 %
3 shifts	25 %

COUNTRY SUMMARY

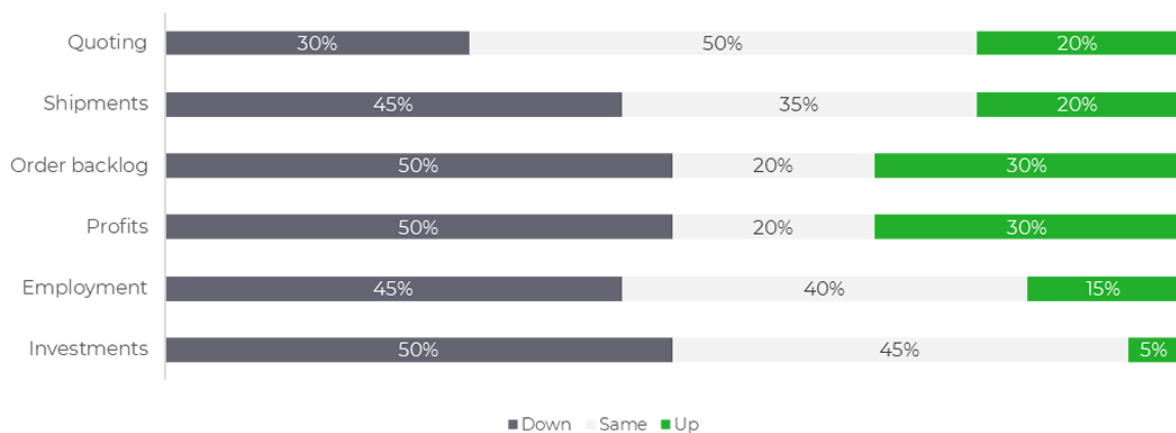
Canada



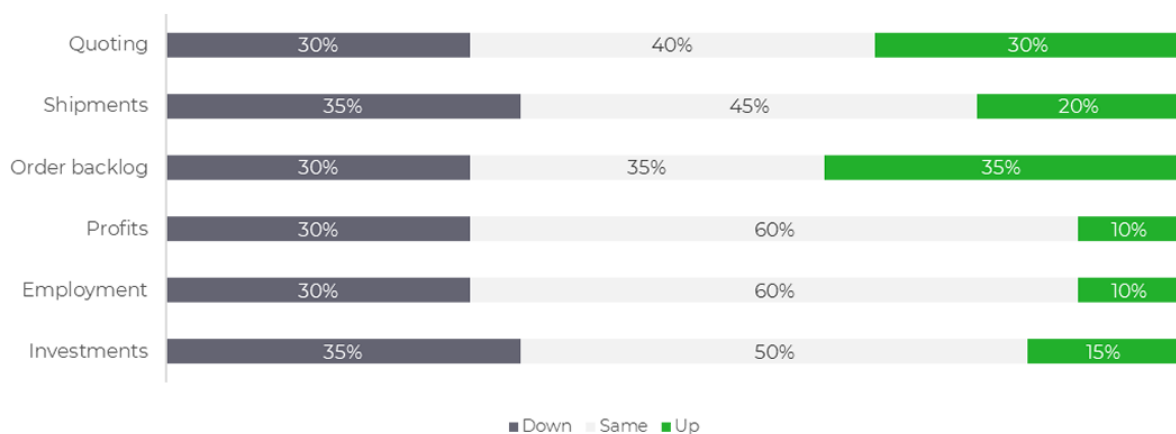
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Czechia



09 answers Business profile

Main activity

Moulds	44 %
Dies	44 %
Precision Machining	11 %

Size (tons)

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

Future work currently on order books (in weeks)

1 - 4 weeks	11 %
5 - 8 weeks	22 %
9 - 12 weeks	33 %
+ 12 weeks	33 %

People & work

Total number of skilled employees **1 787**

Current average work week per skilled employee

Up to 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

Number of working shifts

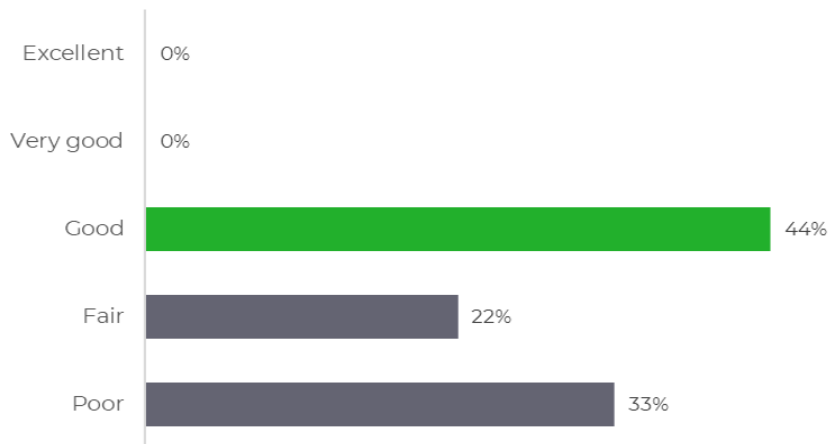
1 shift	22 %
2 shifts	44 %
3 shifts	33 %

COUNTRY SUMMARY

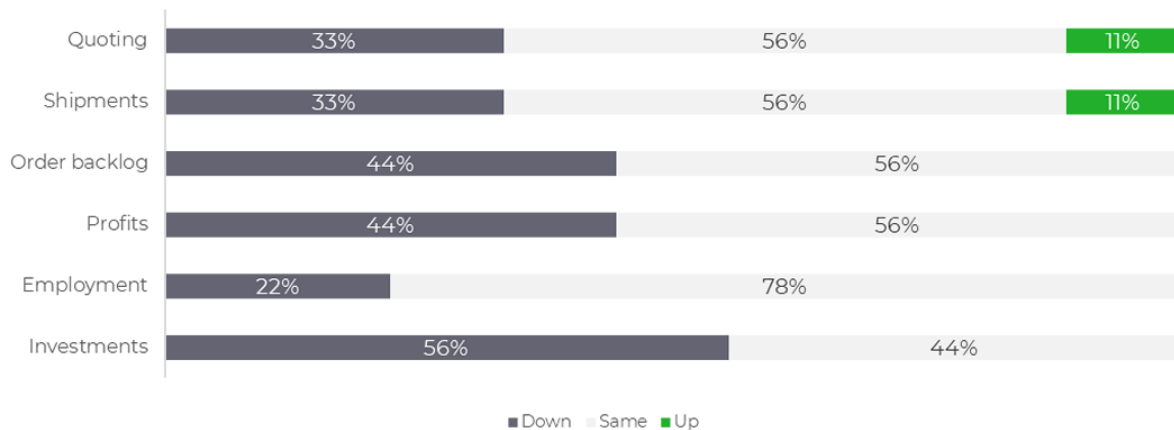
Czechia



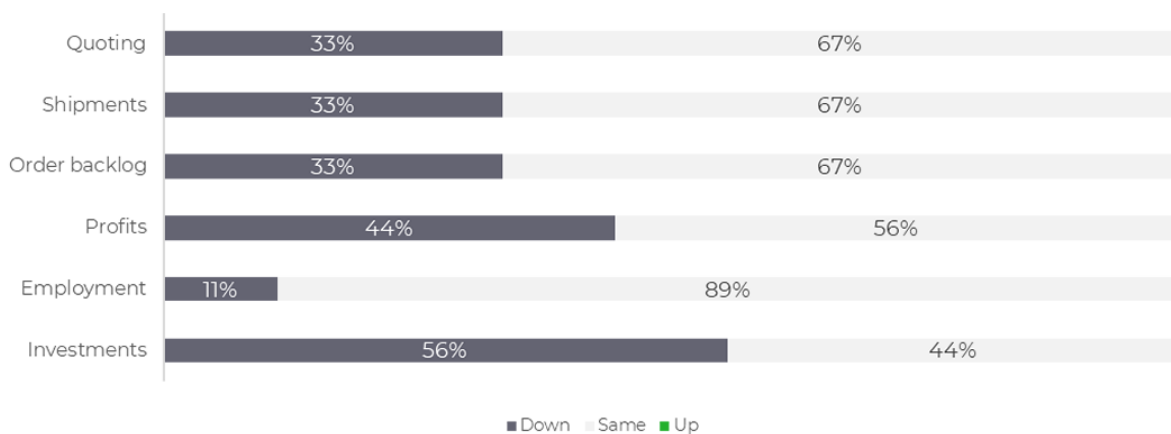
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Estonia



07 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	29 %
9 - 12 weeks	29 %
+ 12 weeks	43 %

People & work

Total number of skilled employees **243**

Current average work week per skilled employee

Up to 40 hours	86 %
Between 40 - 50 hours	14 %
Over 50 hours	0 %

Number of working shifts

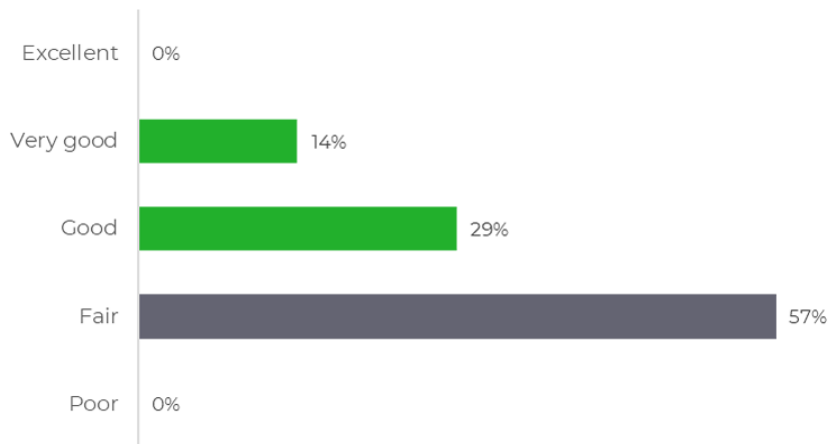
1 shift	43 %
2 shifts	43 %
3 shifts	14 %

COUNTRY SUMMARY

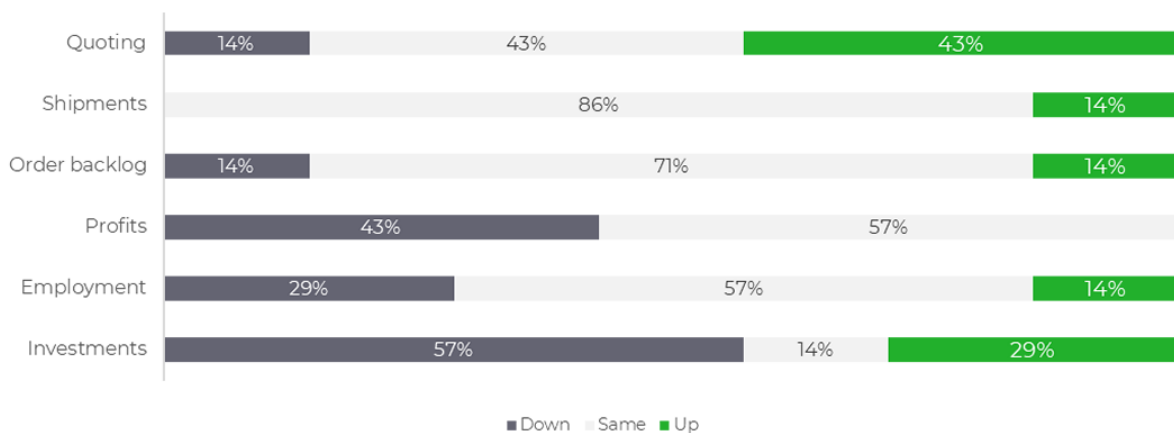
Estonia



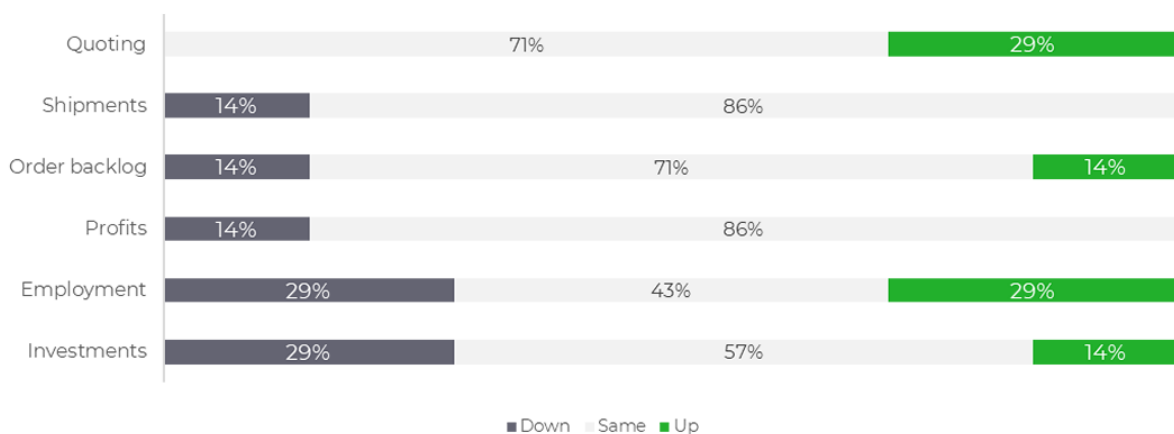
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Finland



2 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	50 %
+ 12 weeks	50 %

People & work

Total number of skilled employees **155**

Current average work week per skilled employee

Up to 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

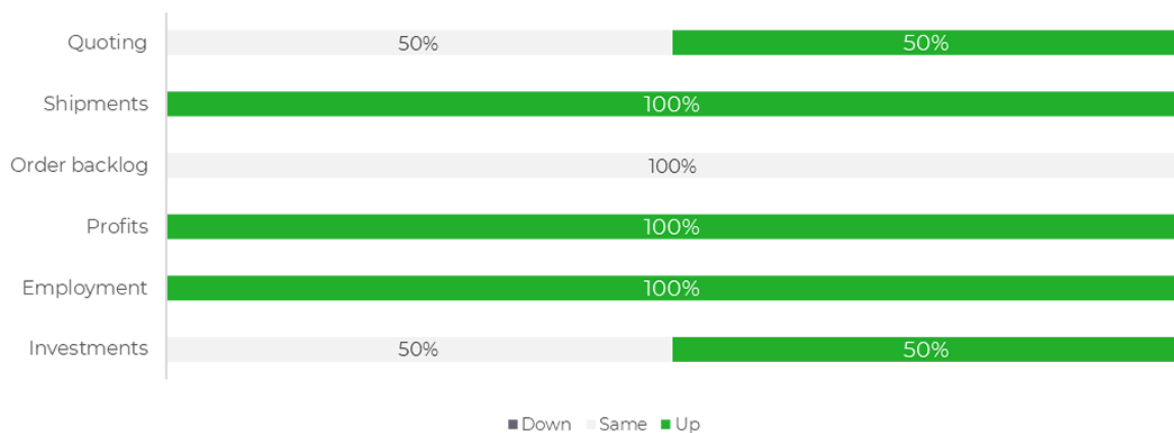
Finland



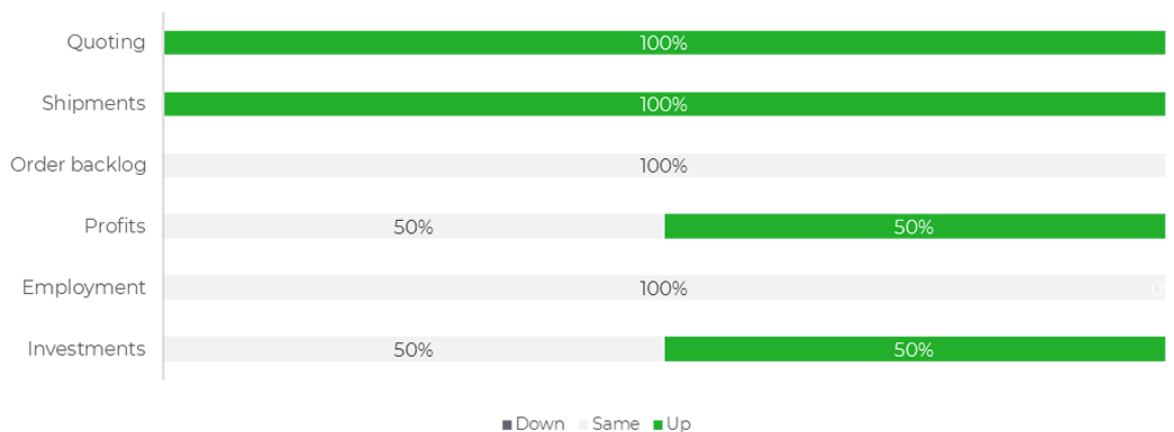
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Germany



14 answers Business profile

Main activity

Moulds	64 %
Dies	29 %
Precision Machining	7 %

Size (tons)

Small / Medium (< 10 tons)	86 %
Large (> 10 tons)	14 %

Future work currently on order books (in weeks)

1 - 4 weeks	36 %
5 - 8 weeks	36 %
9 - 12 weeks	21 %
+ 12 weeks	7 %

People & work

Total number of skilled employees **653**

Current average work week per skilled employee

Up to 40 hours	93 %
Between 40 - 50 hours	7 %
Over 50 hours	0 %

Number of working shifts

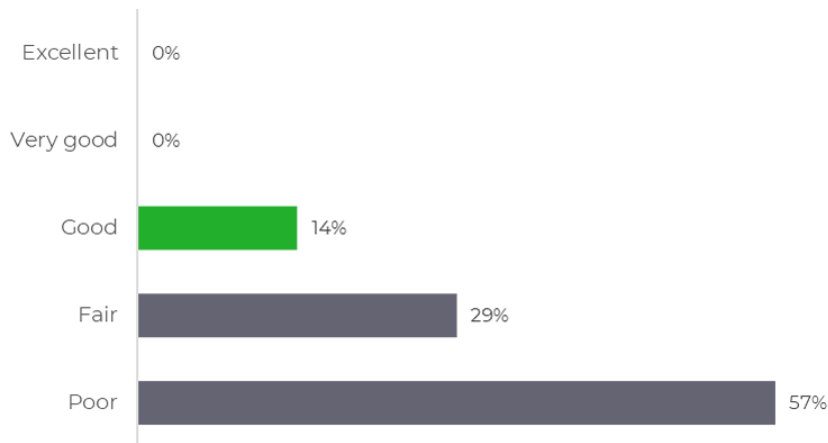
1 shift	71 %
2 shifts	21 %
3 shifts	7 %

COUNTRY SUMMARY

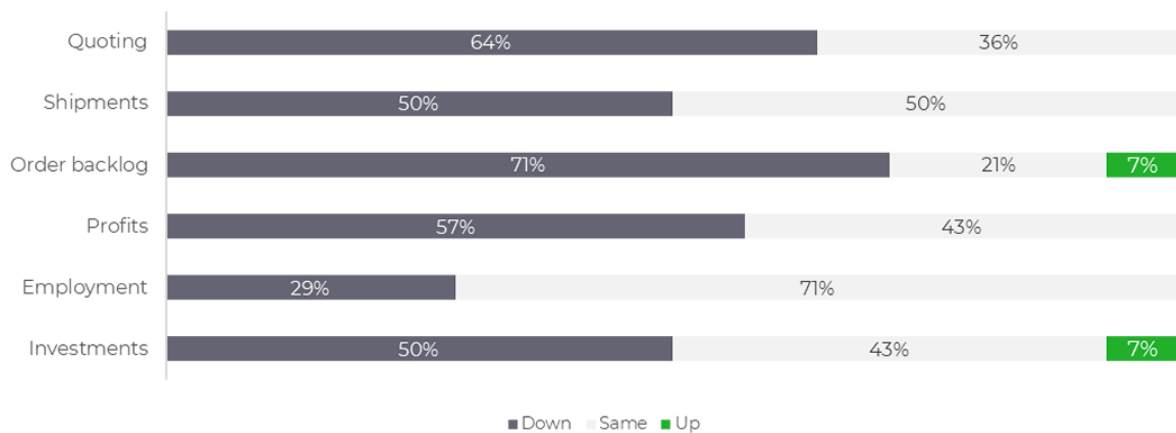
Germany



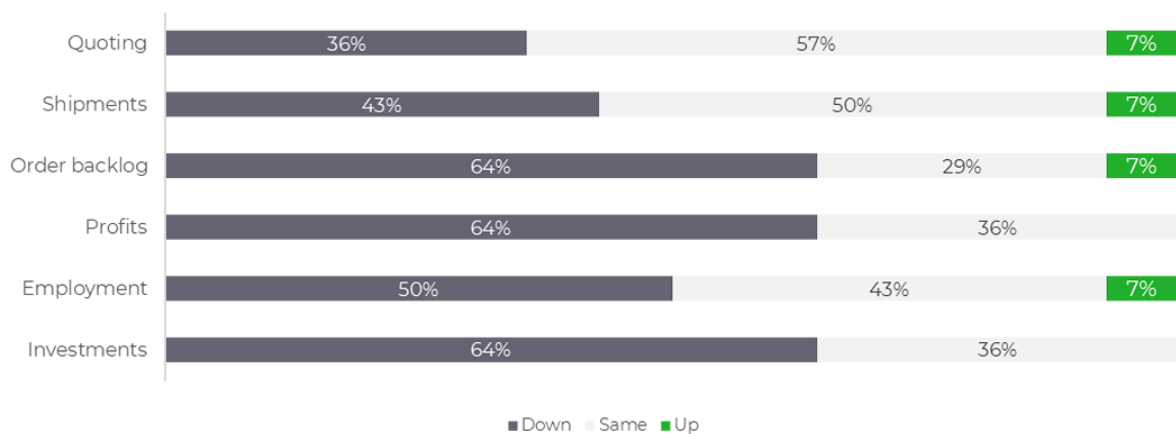
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Italy



14 answers Business profile

Main activity

Moulds	64 %
Dies	29 %
Precision Machining	7 %

Size (tons)

Small / Medium (< 10 tons)	79 %
Large (> 10 tons)	14 %

Blank or invalid answers

7 %

Future work currently on order books (in weeks)

1 - 4 weeks	14 %
5 - 8 weeks	21 %
9 - 12 weeks	14 %
+ 12 weeks	50 %

People & work

Total number of skilled employees **257**

Current average work week per skilled employee

Up to 40 hours	93 %
Between 40 - 50 hours	7 %
Over 50 hours	0 %

Number of working shifts

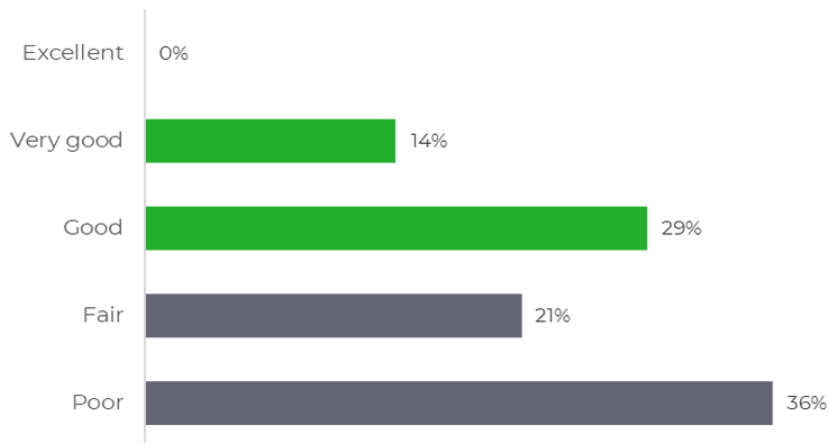
1 shift	93 %
2 shifts	7 %
3 shifts	0 %

COUNTRY SUMMARY

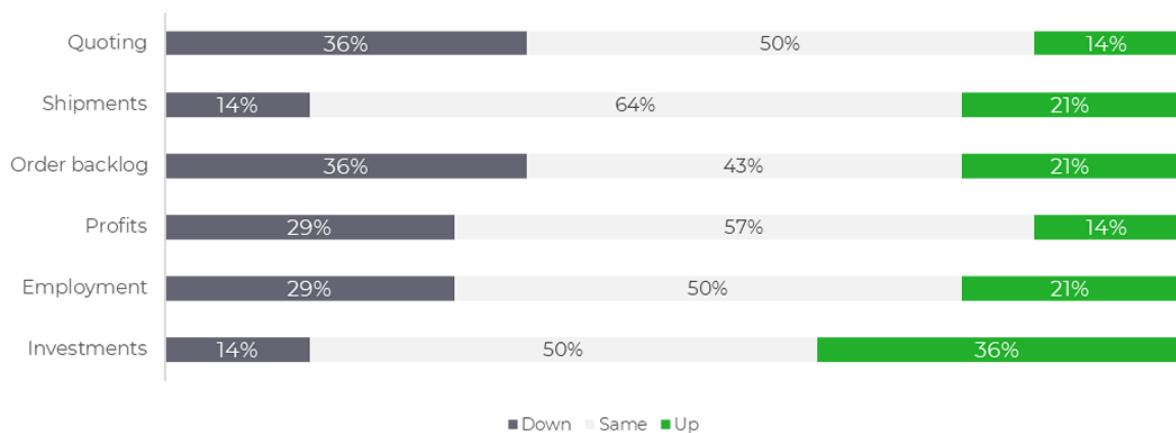
Italy



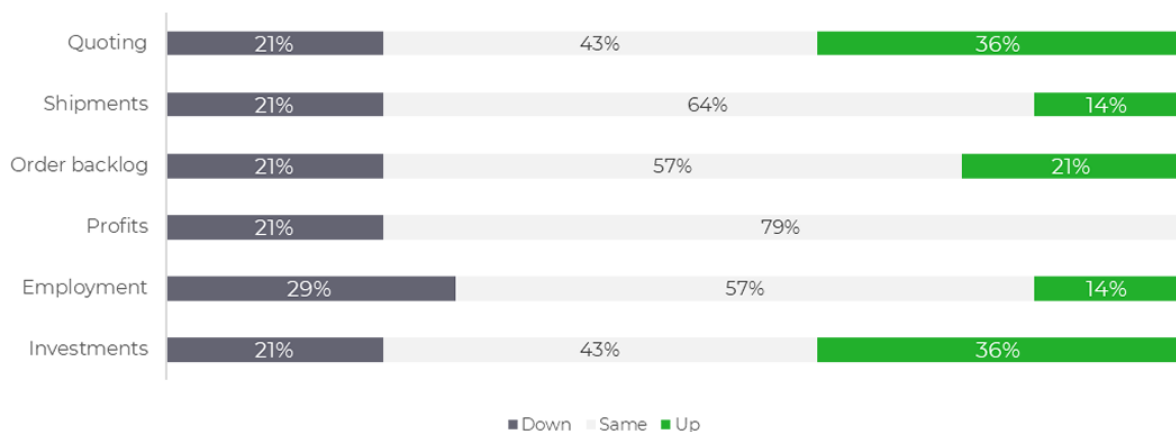
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Japan



14 answers Business profile

Main activity

Moulds	43 %
Dies	50 %
Precision Machining	7 %

Size (tons)

Small / Medium (< 10 tons)	86 %
Large (> 10 tons)	14 %

Future work currently on order books (in weeks)

1 - 4 weeks	36 %
5 - 8 weeks	36 %
9 - 12 weeks	14 %
+ 12 weeks	14 %

People & work

Total number of skilled employees **1 786**

Current average work week per skilled employee

Up to 40 hours	57 %
Between 40 - 50 hours	29 %
Over 50 hours	14 %

Number of working shifts

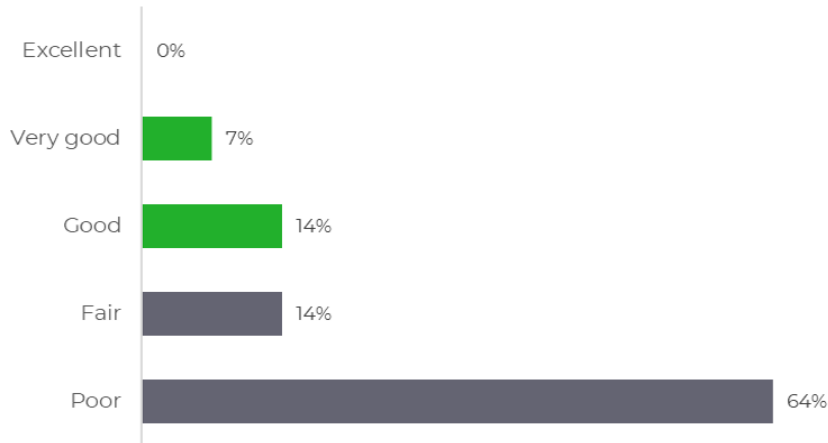
1 shift	71 %
2 shifts	29 %
3 shifts	0 %

COUNTRY SUMMARY

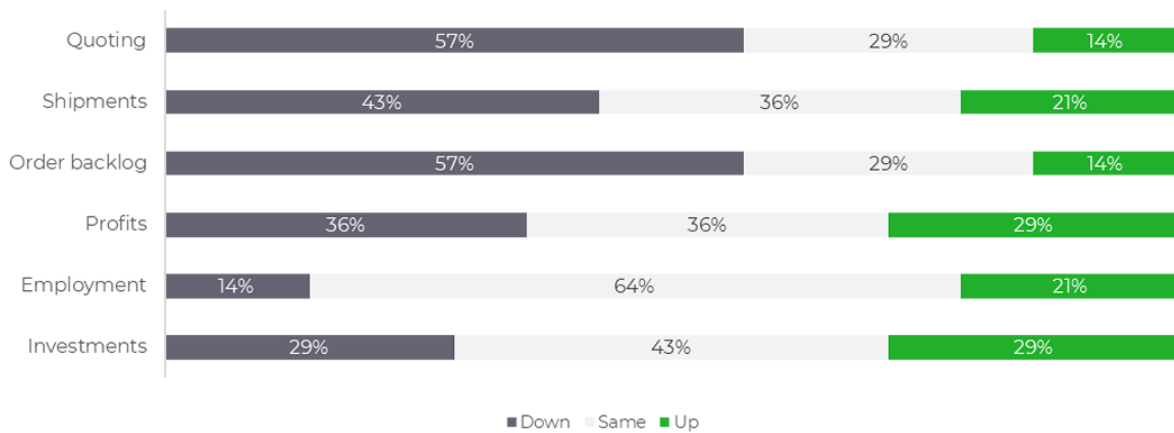
Japan



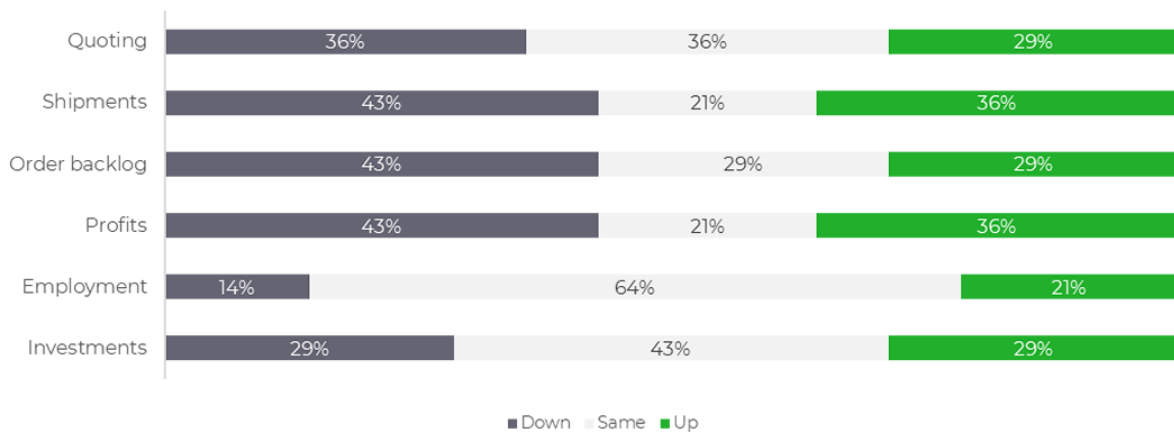
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Mexico



11 answers Business profile

Main activity

Moulds	64 %
Dies	27 %
Precision Machining	9 %

Size (tons)

Small / Medium (< 10 tons)	91 %
Large (> 10 tons)	9 %

Future work currently on order books (in weeks)

1 - 4 weeks	45 %
5 - 8 weeks	27 %
9 - 12 weeks	18 %
+ 12 weeks	9 %

People & work

Total number of skilled employees **413**

Current average work week per skilled employee

Up to 40 hours	18 %
Between 40 - 50 hours	64 %
Over 50 hours	18 %

Number of working shifts

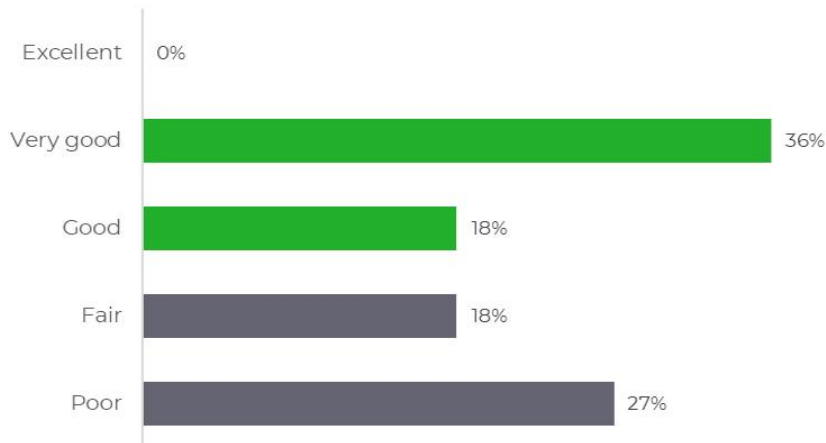
1 shift	45 %
2 shifts	36 %
3 shifts	18 %

COUNTRY SUMMARY

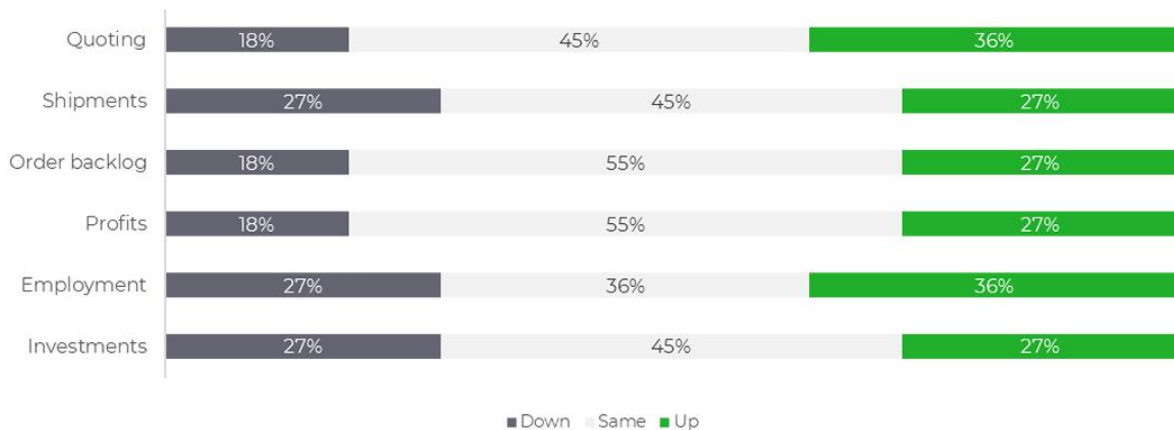
Mexico



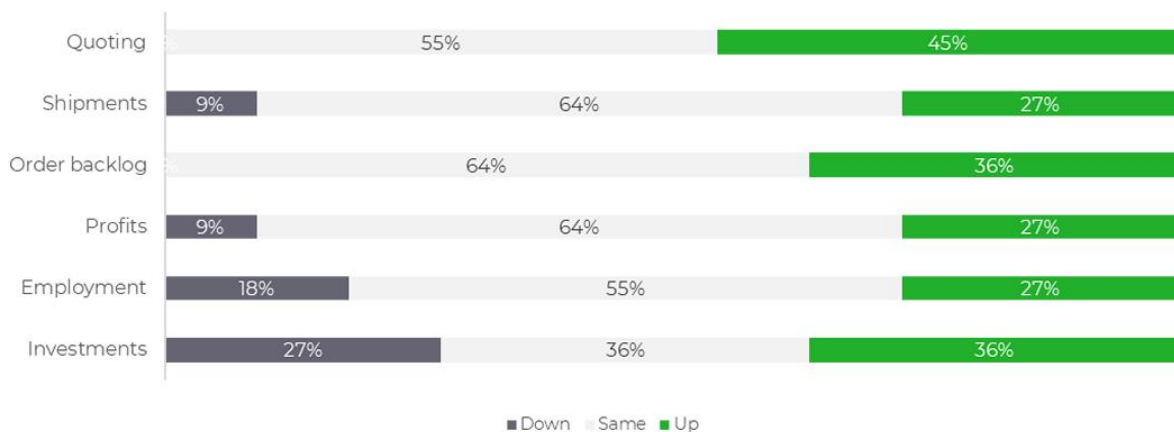
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Poland



2 answers Business profile

Main activity

Moulds	50 %
Dies	0 %
Precision Machining	0 %

Blank or invalid answers 50 %

Size (tons)

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

Future work currently on order books (in weeks)

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

People & work

Total number of skilled employees **55**

Current average work week per skilled employee

Up to 40 hours	0 %
Between 40 - 50 hours	0 %
Over 50 hours	100 %

Number of working shifts

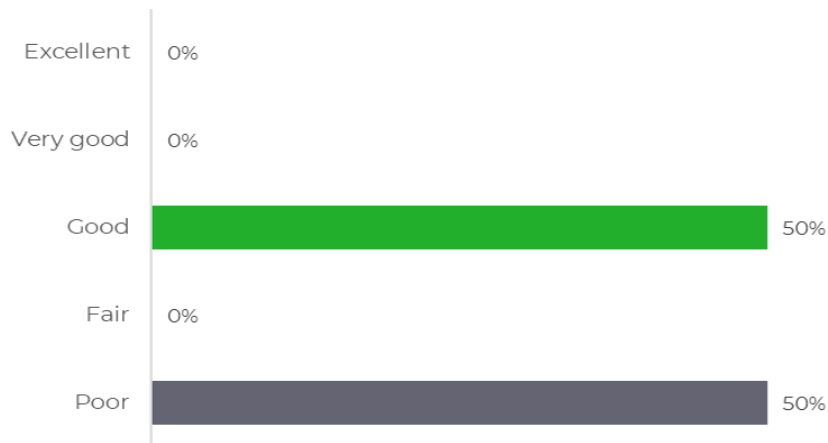
1 shift	0 %
2 shifts	0 %
3 shifts	100 %

COUNTRY SUMMARY

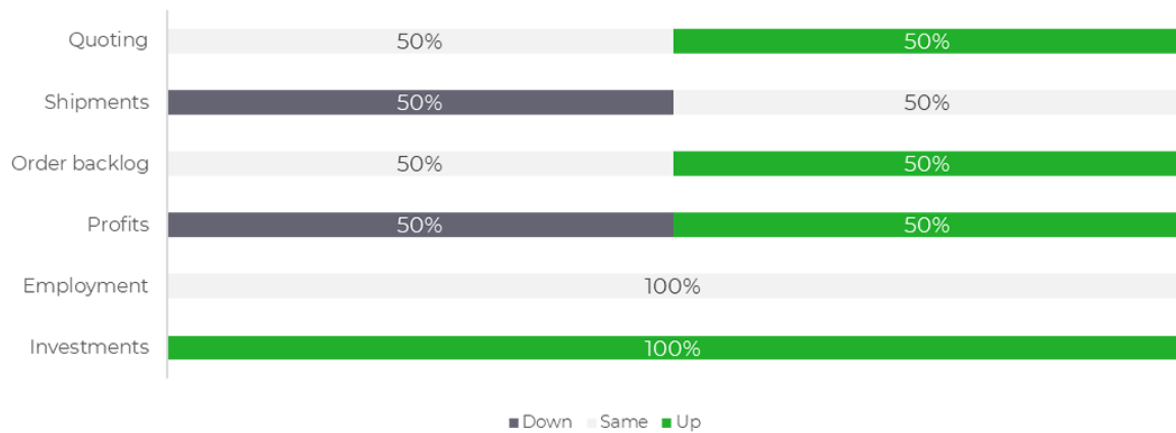
Poland



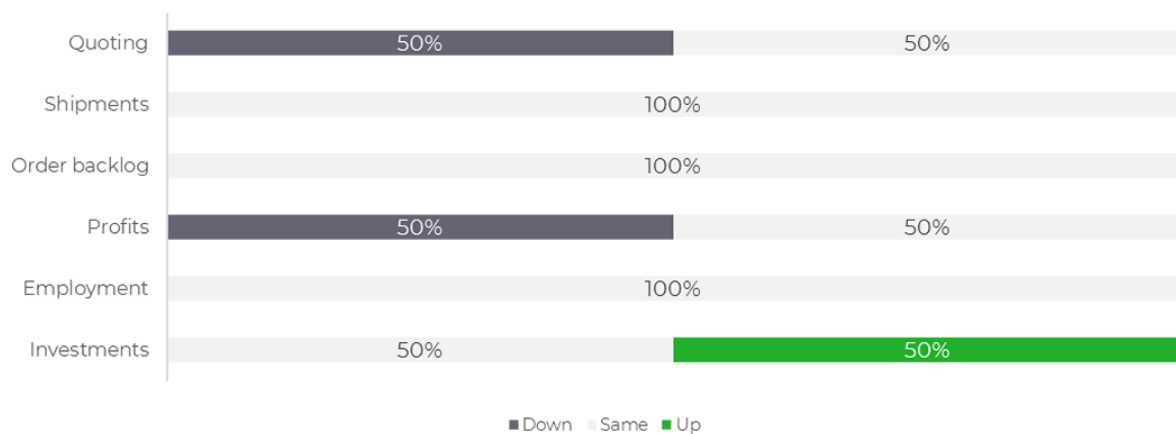
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Portugal



14 answers Business profile

Main activity

Moulds	100 %
Dies	0 %
Precision Machining	0 %

Size (tons)

Small / Medium (< 10 tons)	71 %
Large (> 10 tons)	14 %

Blank or invalid answers

14 %

Future work currently on order books (in weeks)

1 - 4 weeks	7 %
5 - 8 weeks	36 %
9 - 12 weeks	14 %
+ 12 weeks	43 %

People & work

Total number of skilled employees **1 693**

Current average work week per skilled employee

Up to 40 hours	86 %
Between 40 - 50 hours	14 %
Over 50 hours	0 %

Number of working shifts

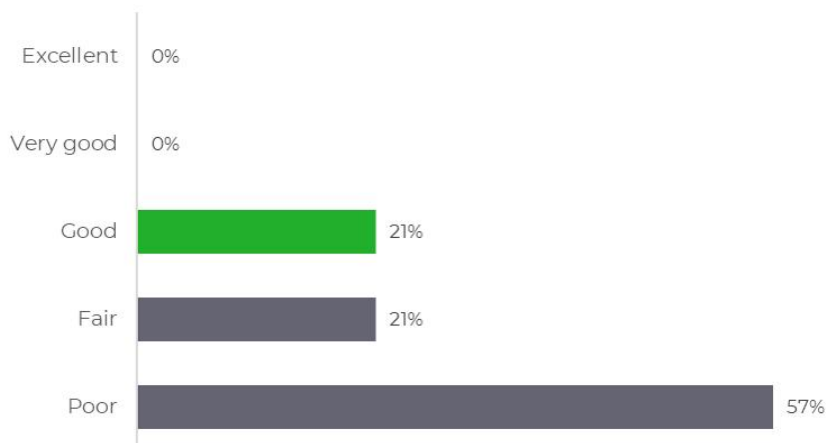
1 shift	57 %
2 shifts	29 %
3 shifts	14 %

COUNTRY SUMMARY

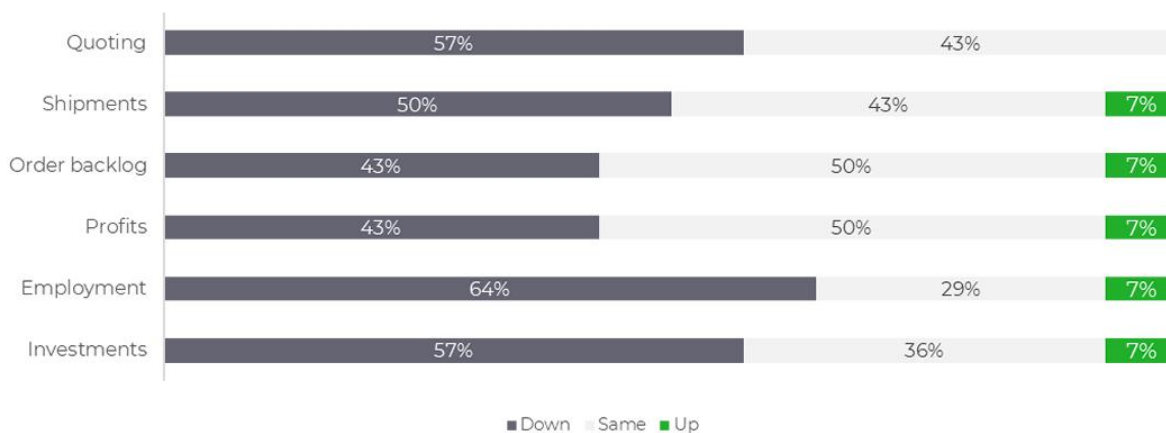
Portugal



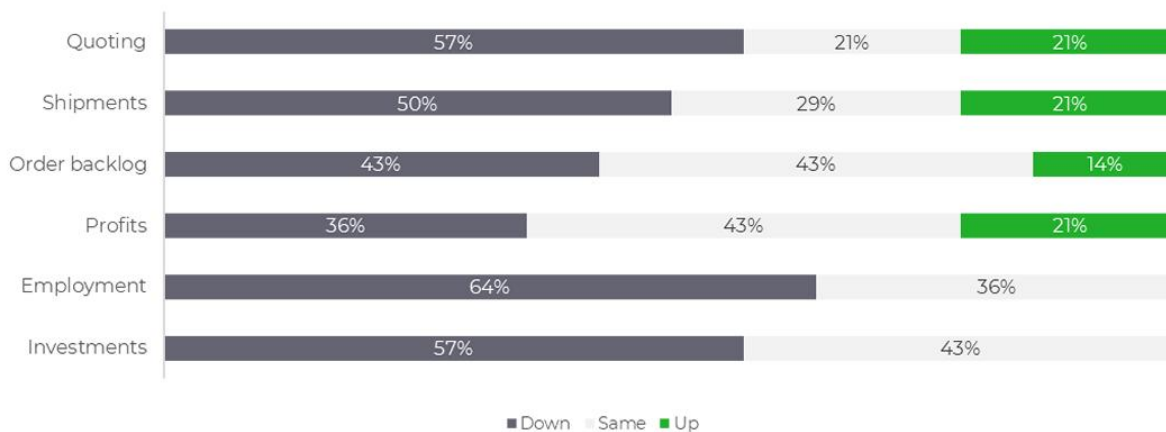
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Slovenia



8 answers Business profile

Main activity

Moulds	75 %
Dies	0 %
Precision Machining	25 %

Size (tons)

Small / Medium (< 10 tons)	88 %
Large (> 10 tons)	12 %

Future work currently on order books (in weeks)

1 - 4 weeks	63 %
5 - 8 weeks	37 %
9 - 12 weeks	0 %
+ 12 weeks	0 %

People & work

Total number of skilled employees **79**

Current average work week per skilled employee

Up to 40 hours	63 %
Between 40 - 50 hours	37 %
Over 50 hours	0 %

Number of working shifts

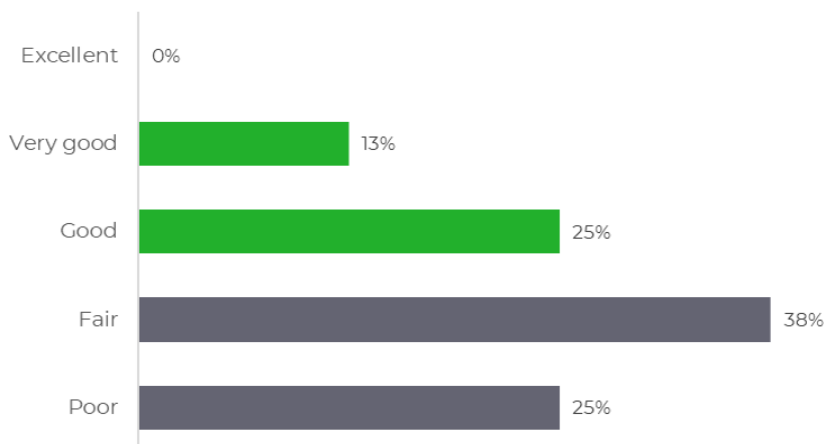
1 shift	100 %
2 shifts	0 %
3 shifts	0 %

COUNTRY SUMMARY

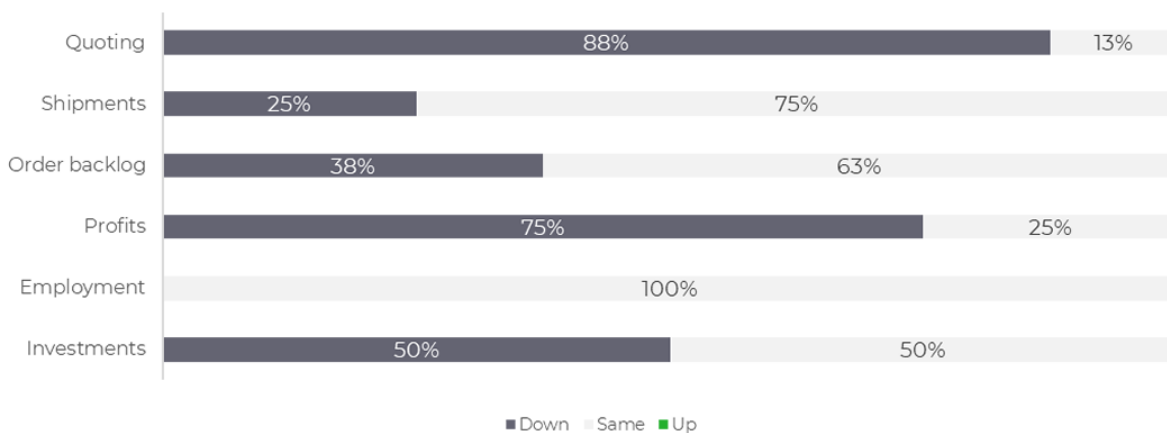
Slovenia



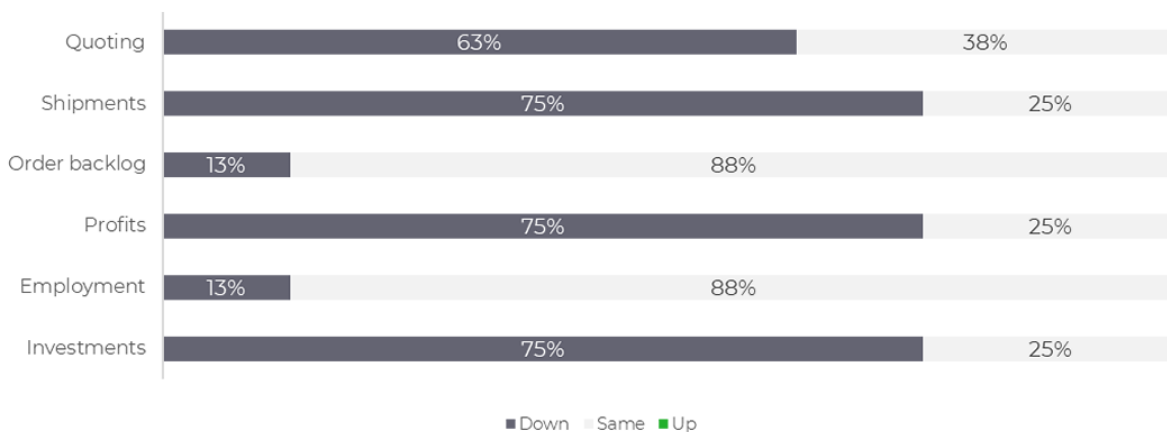
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

South Africa



60 answers Business profile

Main activity

Moulds	37 %
Dies	13 %
Precision Machining	50 %

Size (tons)

Small / Medium (< 10 tons)	85 %
Large (> 10 tons)	15 %

Future work currently on order books (in weeks)

1 - 4 weeks	38 %
5 - 8 weeks	33 %
9 - 12 weeks	12 %
+ 12 weeks	17 %

People & work

Total number of skilled employees **1 084**

Current average work week per skilled employee

Up to 40 hours	62 %
Between 40 - 50 hours	37 %
Over 50 hours	2 %

Number of working shifts

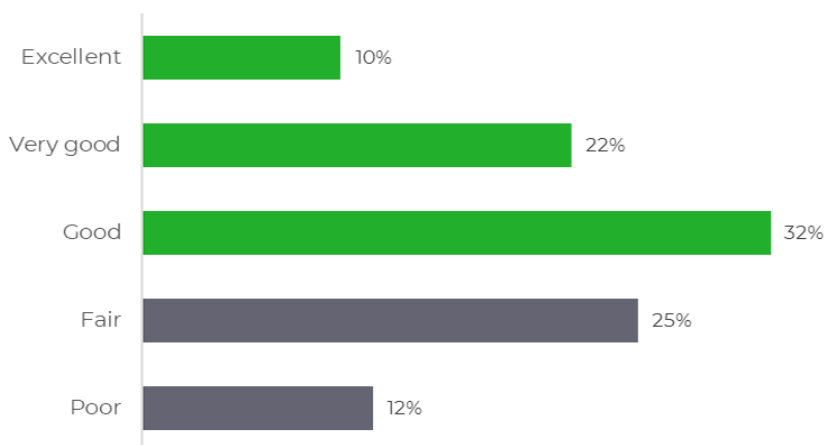
1 shift	70 %
2 shifts	20 %
3 shifts	10 %

COUNTRY SUMMARY

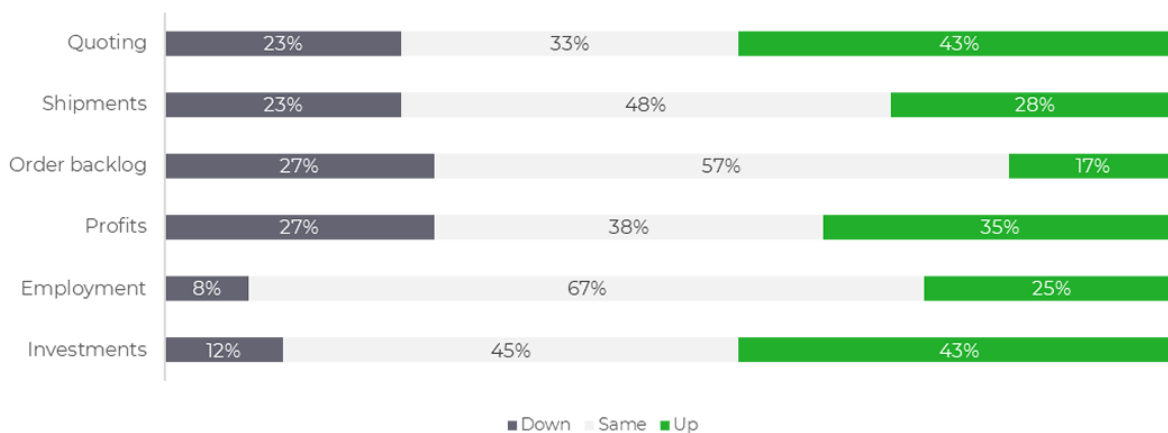
South Africa



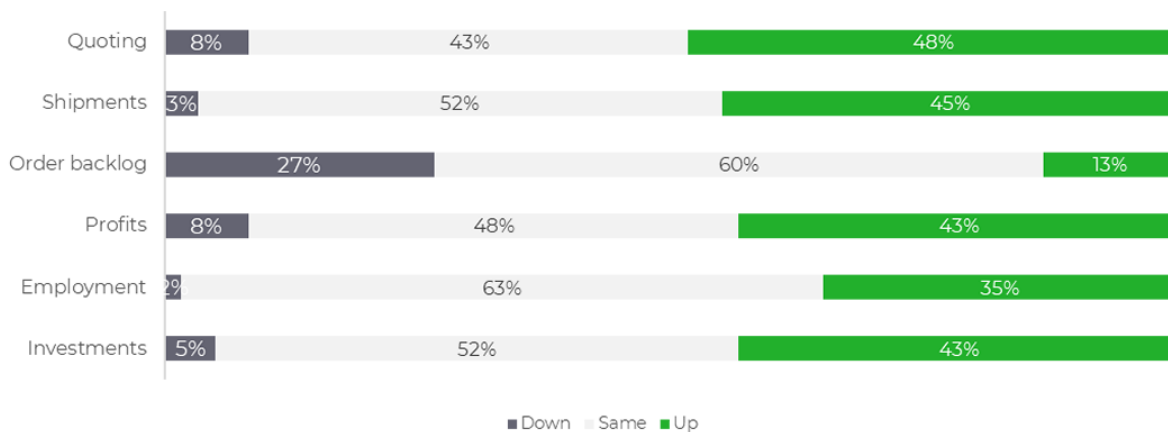
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Spain



2 answers

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	50 %
+ 12 weeks	50 %

People & work

Total number of skilled employees **64**

Current average work week per skilled employee

Up to 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

Number of working shifts

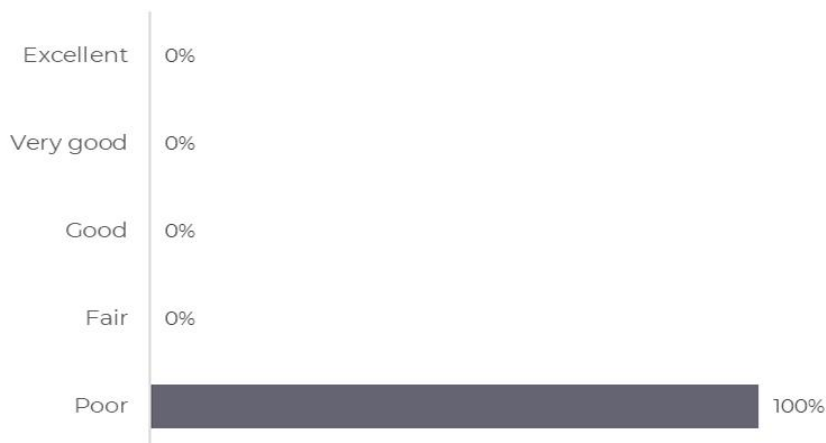
1 shift	0 %
2 shifts	100 %
3 shifts	0 %

COUNTRY SUMMARY

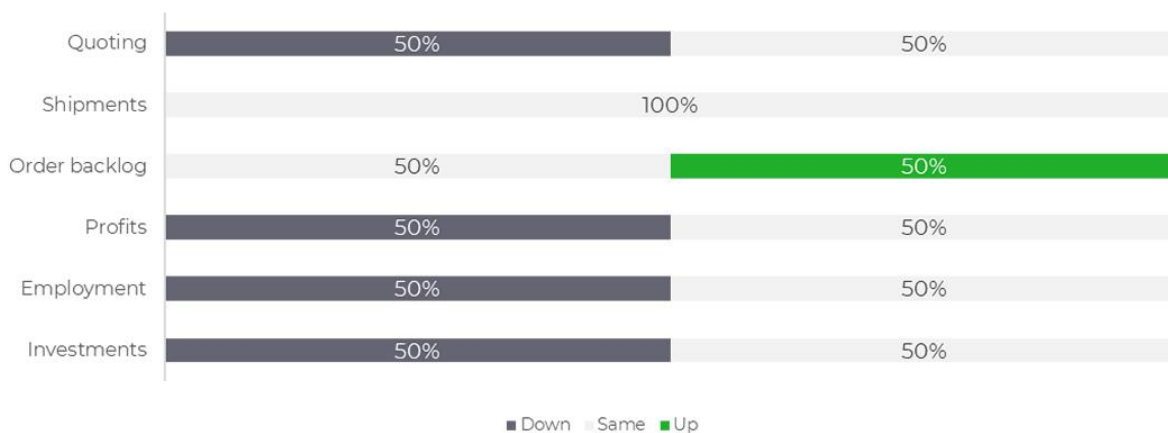
Spain



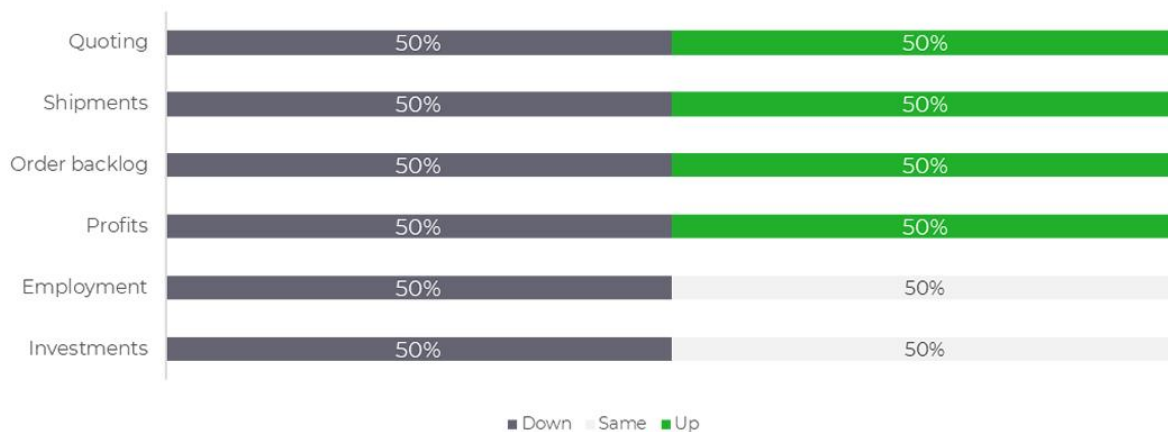
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Switzerland



20 answers Business profile

Main activity

Moulds	60 %
Dies	5 %
Precision Machining	35 %

Size (tons)

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

Future work currently on order books (in weeks)

1 - 4 weeks	10 %
5 - 8 weeks	40 %
9 - 12 weeks	25 %
+ 12 weeks	25 %

People & work

Total number of skilled employees **1 400**

Current average work week per skilled employee

Up to 40 hours	10 %
Between 40 - 50 hours	90 %
Over 50 hours	0 %

Number of working shifts

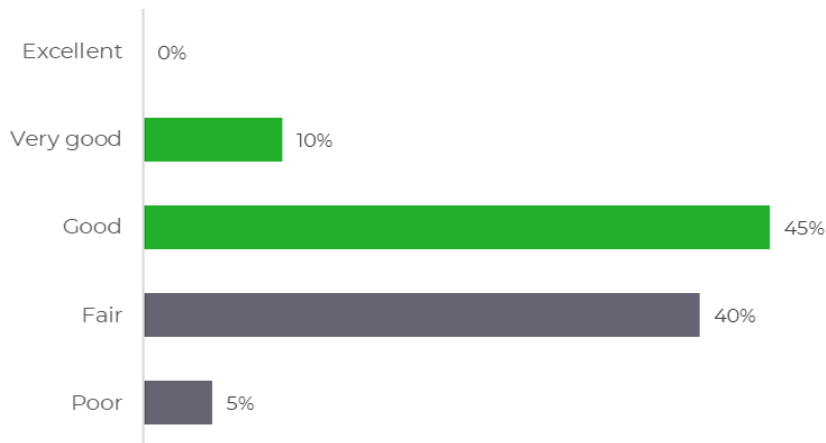
1 shift	80 %
2 shifts	15 %
3 shifts	5 %

COUNTRY SUMMARY

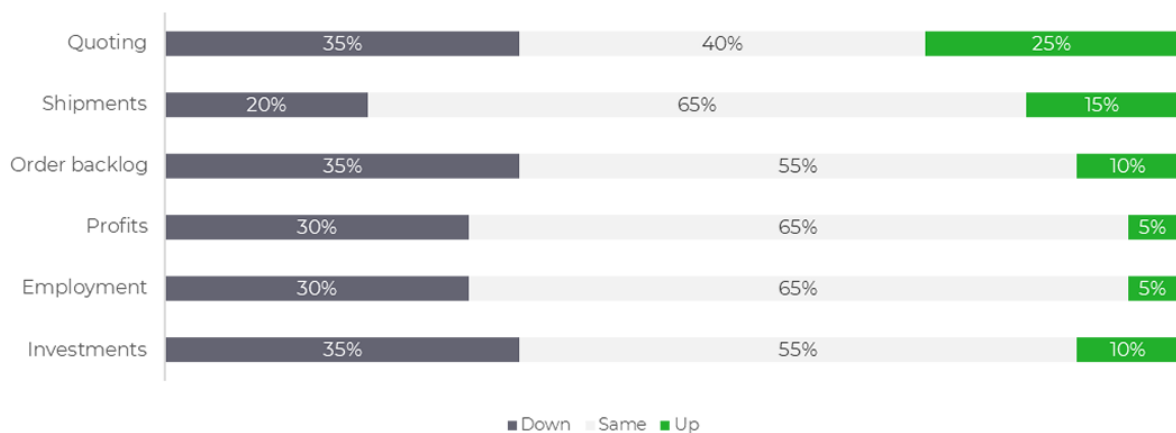
Switzerland



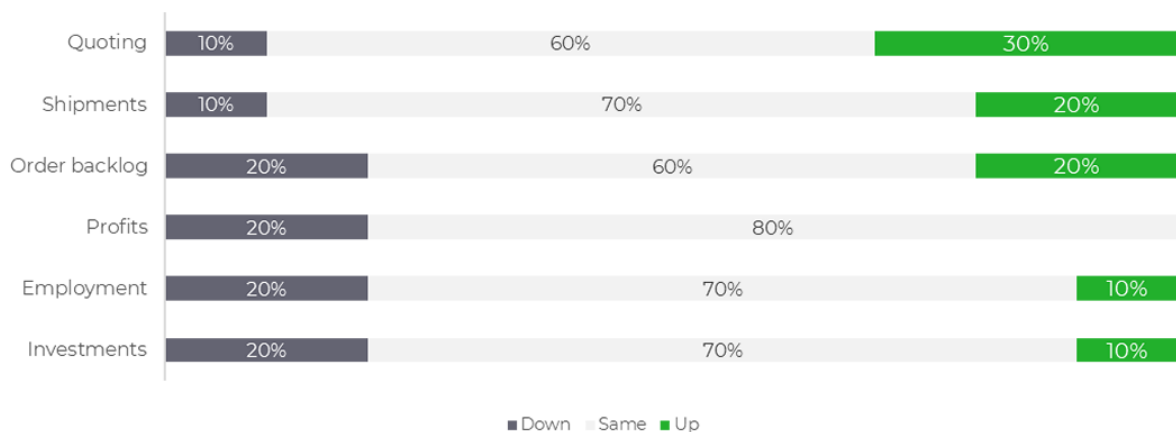
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

Turkey



6 answers

Business profile

Main activity

Moulds	50 %
Dies	50 %
Precision Machining	0 %

Size (tons)

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

Future work currently on order books (in weeks)

1 - 4 weeks	17 %
5 - 8 weeks	50 %
9 - 12 weeks	17 %
+ 12 weeks	17 %

People & work

Total number of skilled employees **1 371**

Current average work week per skilled employee

Up to 40 hours	0 %
Between 40 - 50 hours	83 %
Over 50 hours	17 %

Number of working shifts

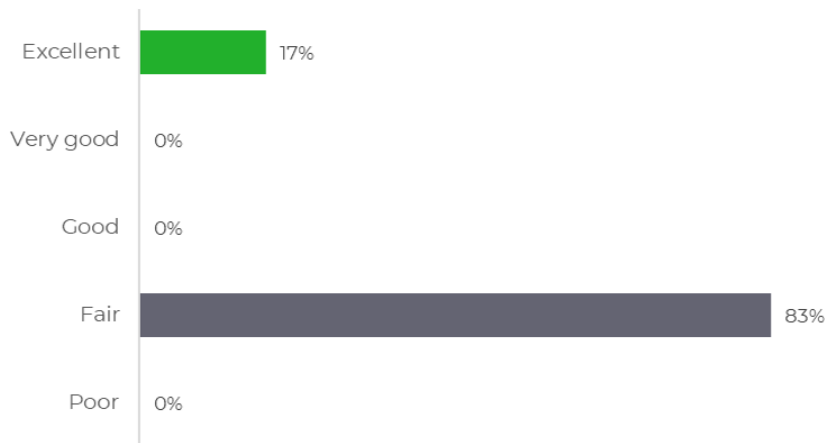
1 shift	0 %
2 shifts	83 %
3 shifts	17 %

COUNTRY SUMMARY

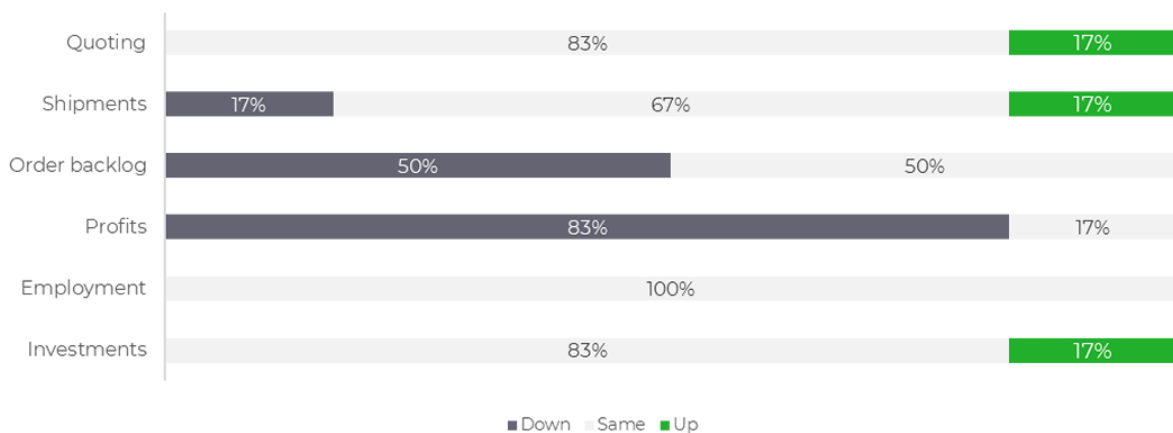
Turkey



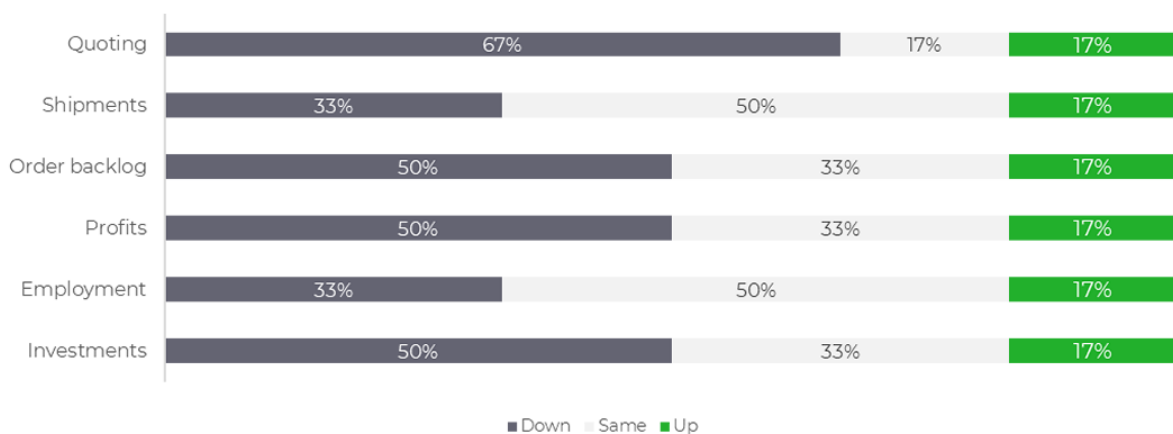
Current business conditions



Compared with last semester



Projected business conditions over six months



COUNTRY SUMMARY

United Kingdom



3 answers

Business profile

Main activity

Moulds	0 %
Dies	33 %
Precision Machining	67 %

Size (tons)

Small / Medium (< 10 tons)	67 %
Large (> 10 tons)	33 %

Future work currently on order books (in weeks)

1 - 4 weeks	67 %
5 - 8 weeks	0 %
9 - 12 weeks	33 %
+ 12 weeks	0 %

People & work

Total number of skilled employees **68**

Current average work week per skilled employee

Up to 40 hours	100 %
Between 40 - 50 hours	0 %
Over 50 hours	0 %

Number of working shifts

1 shift	67 %
2 shifts	33 %
3 shifts	0 %

COUNTRY SUMMARY

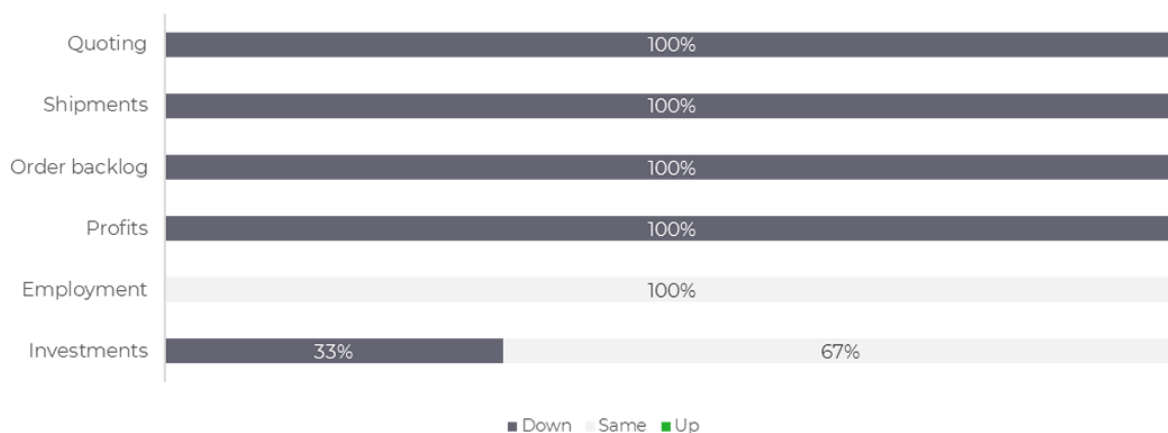
United Kingdom



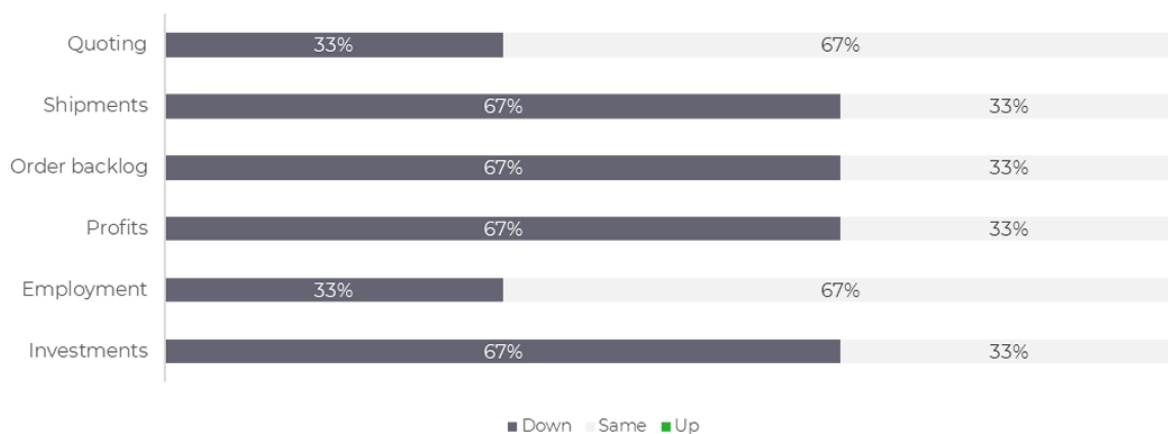
Current business conditions



Compared with last semester



Projected business conditions over six months



GLOBAL PARTNER SUMMARY

AHP Merkle

Mouldmaking



Current business conditions

	POOR	FAIR	GOOD	VERY GOOD	EXCELLENT
Brazil	●	●	●	●	●
Canada	●	●	●	●	●
China	●	●	●	●	●
Czech Republic	●	●	●	●	●
Estonia	●	●	●	●	●
Finland	●	●	●	●	●
Germany	●	●	●	●	●
Italy	●	●	●	●	●
Japan	●	●	●	●	●
Mexico	●	●	●	●	●
Portugal	●	●	●	●	●
Slovenia	●	●	●	●	●
South Africa	●	●	●	●	●
Sweden	●	●	●	●	●
Switzerland	●	●	●	●	●
Turkey	●	●	●	●	●
United Kingdom	●	●	●	●	●
USA	●	●	●	●	●

Business conditions forecast

	DOWN	SAME	UP
Brazil	●	●	●
Canada	●	●	●
China	●	●	●
Czech Republic	●	●	●
Estonia	●	●	●
Finland	●	●	●
Germany	●	●	●
Italy	●	●	●
Japan	●	●	●
Mexico	●	●	●
Portugal	●	●	●
Slovenia	●	●	●
South Africa	●	●	●
Sweden	●	●	●
Switzerland	●	●	●
Turkey	●	●	●
United Kingdom	●	●	●
USA	●	●	●

GLOBAL PARTNER SUMMARY

AHP Merkle

Diemaking



Current business conditions

	POOR	FAIR	GOOD	VERY GOOD	EXCELLENT
Brazil	●	●	●	●	●
Canada	●	●	●	●	●
China	●	●	●	●	●
Czech Republic	●	●	●	●	●
Estonia	●	●	●	●	●
Finland	●	●	●	●	●
Germany	●	●	●	●	●
Italy	●	●	●	●	●
Japan	●	●	●	●	●
Mexico	●	●	●	●	●
Portugal	●	●	●	●	●
Slovenia	●	●	●	●	●
South Africa	●	●	●	●	●
Sweden	●	●	●	●	●
Switzerland	●	●	●	●	●
Turkey	●	●	●	●	●
United Kingdom	●	●	●	●	●
USA	●	●	●	●	●

Business conditions forecast

	DOWN	SAME	UP
Brazil	●	●	●
Canada	●	●	●
China	●	●	●
Czech Republic	●	●	●
Estonia	●	●	●
Finland	●	●	●
Germany	●	●	●
Italy	●	●	●
Japan	●	●	●
Mexico	●	●	●
Portugal	●	●	●
Slovenia	●	●	●
South Africa	●	●	●
Sweden	●	●	●
Switzerland	●	●	●
Turkey	●	●	●
United Kingdom	●	●	●
USA	●	●	●

GLOBAL PARTNER SUMMARY

Oerlikon HRSflow

Mouldmaking



Current business conditions

	POOR	FAIR	GOOD	VERY GOOD	EXCELLENT
Brazil	•	•	•	•	•
Canada	•	•	•	•	•
China	•	•	•	•	•
Czech Republic	•	•	•	•	•
Estonia	•	•	•	•	•
Finland	•	•	•	•	•
Germany	•	•	•	•	•
Italy	•	•	•	•	•
Japan	•	•	•	•	•
Mexico	•	•	•	•	•
Portugal	•	•	•	•	•
Slovenia	•	•	•	•	•
South Africa	•	•	•	•	•
Sweden	•	•	•	•	•
Switzerland	•	•	•	•	•
Turkey	•	•	•	•	•
United Kingdom	•	•	•	•	•
USA	•	•	•	•	•

Business conditions forecast

	DOWN	SAME	UP
Brazil	•	•	•
Canada	•	•	•
China	•	•	•
Czech Republic	•	•	•
Estonia	•	•	•
Finland	•	•	•
Germany	•	•	•
Italy	•	•	•
Japan	•	•	•
Mexico	•	•	•
Portugal	•	•	•
Slovenia	•	•	•
South Africa	•	•	•
Sweden	•	•	•
Switzerland	•	•	•
Turkey	•	•	•
United Kingdom	•	•	•
USA	•	•	•



ISTMA

International Special Tooling and Machining Association