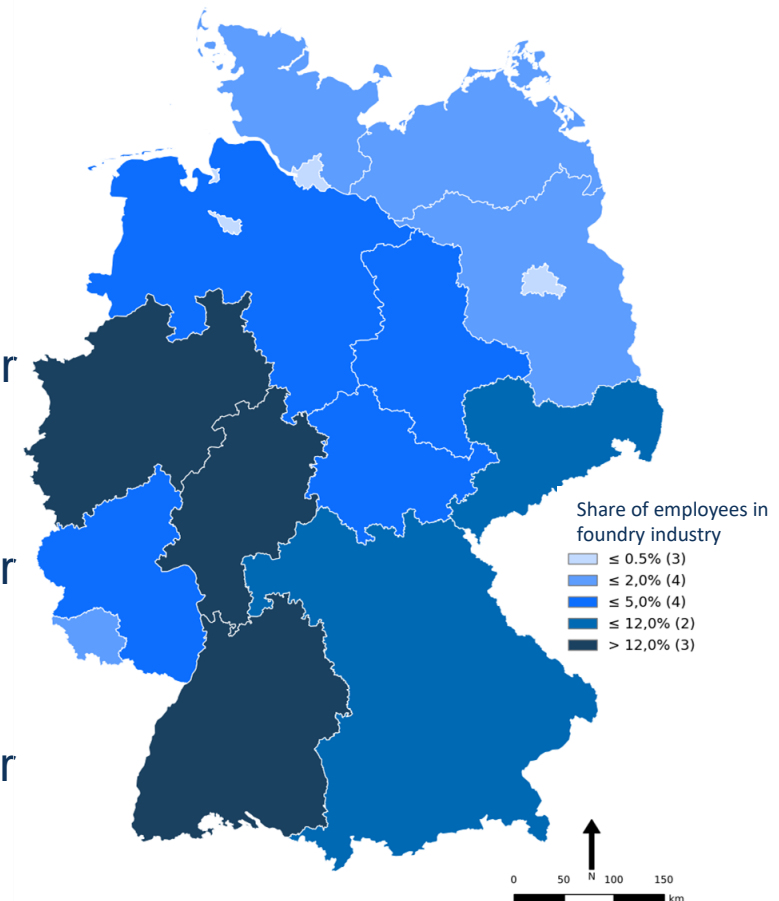


The economic importance of Germany's Foundry Industry



Foundry Industry in 2025

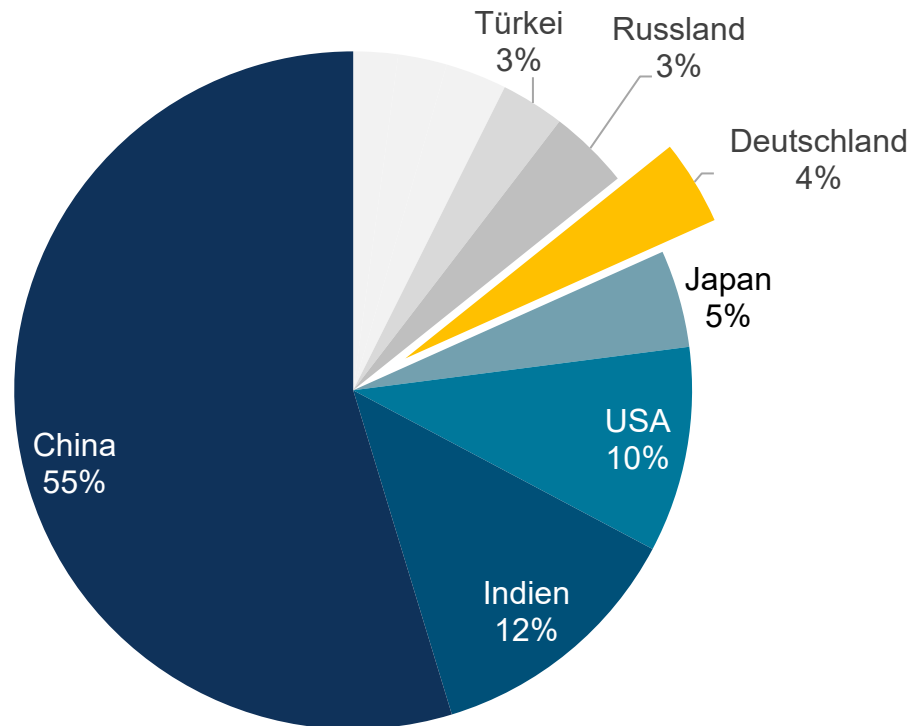
	Production	Turn over*	Employees*
Total	3,3 Mio. t - 3 %	13 Mrd. € -7 %	61.200 Mitarbeiter - 7 %
Ferrous	2,5 Mio. t - 3 %	7 Mrd. € - 7 %	31.900 Mitarbeiter - 6 %
Non Ferrous	0,8 Mio. t - 5 %	6 Mrd. € - 7%	29.200 Mitarbeiter - 7 %



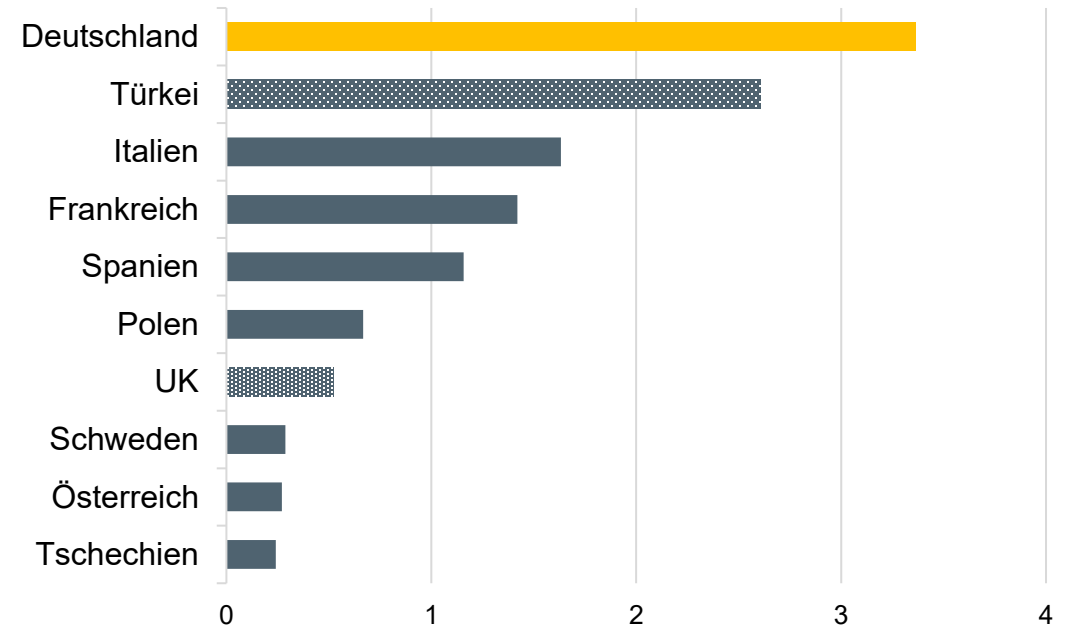
Source: BDG, Stat . BA, *Turn over & employees: >50, Change to previous year

1st in Europe: German Foundries are globally active

Share of global casting production

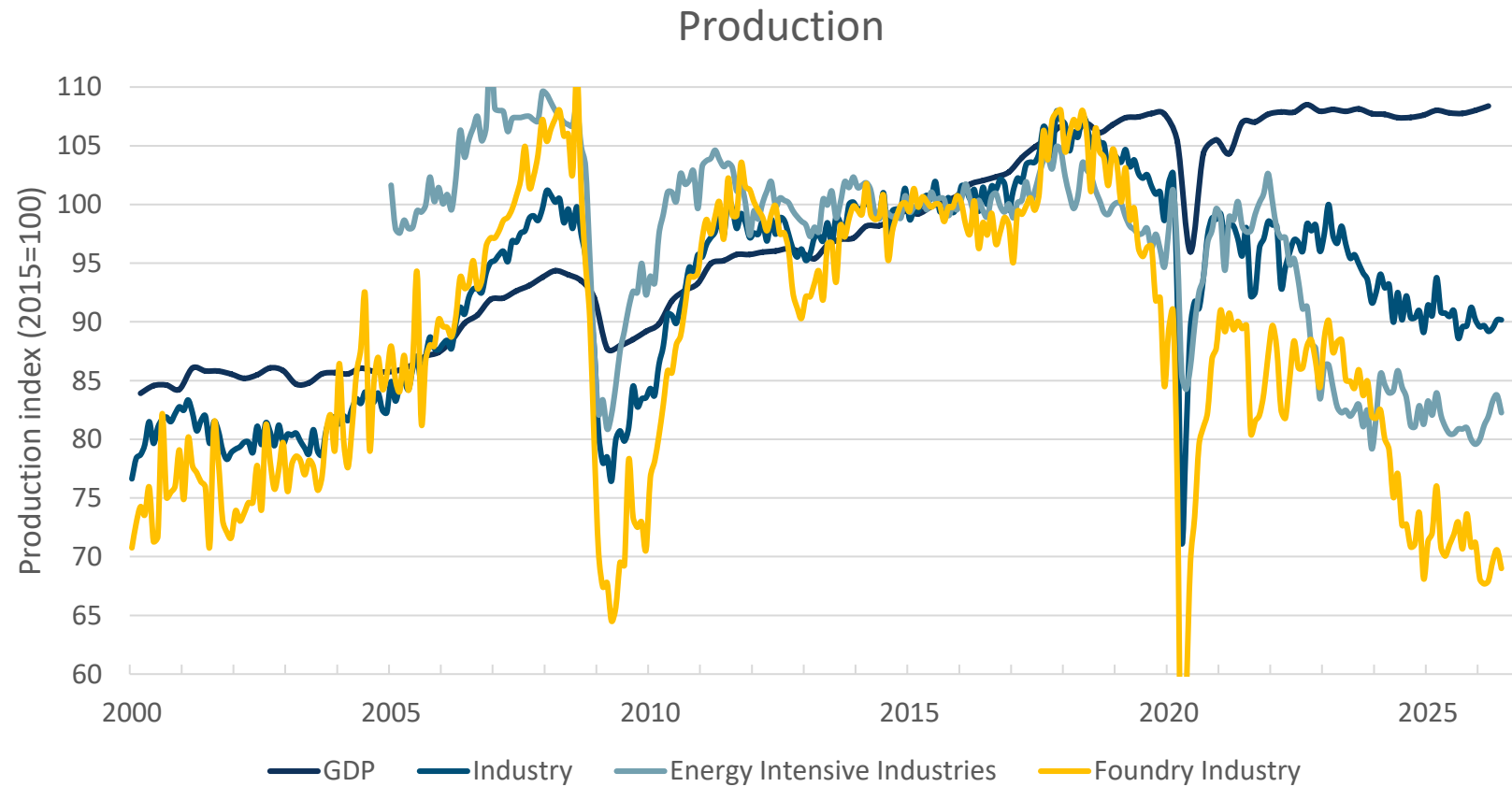


European Casting Production [Mio. t]



Quelle: nationale Verbände, EFF, modern casting;

German casting production in centre of transformation



Ø last 3 months
vs. 2018

GDP
+ 2 %

Industry
- 15 %

Energy Intensive Industries
- 18 %

Foundry Industry
- 35 %

Source: Federal Statistical Office, calendar- and seasonally adjusted

German Foundry Industry

Key figures in 2025



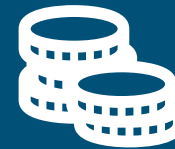
545

Number of foundries



67.700

Employees



€4.9 billion

Gross value added

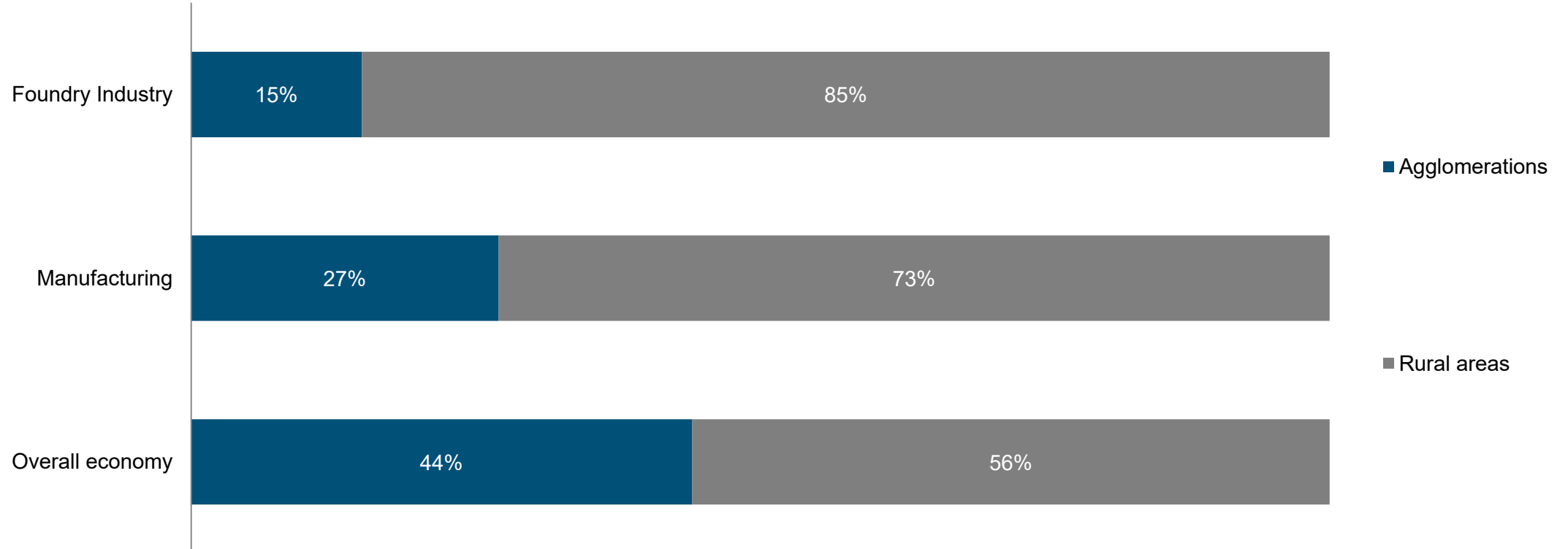


€14 billion

Production value

Foundries are important employers and social stability in rural regions

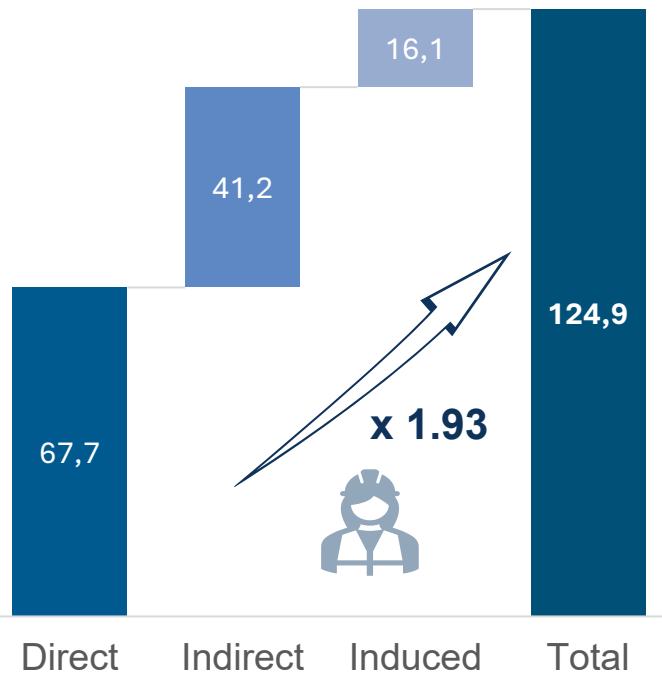
Distribution of foundry employees compared to manufacturing and the economy as a whole



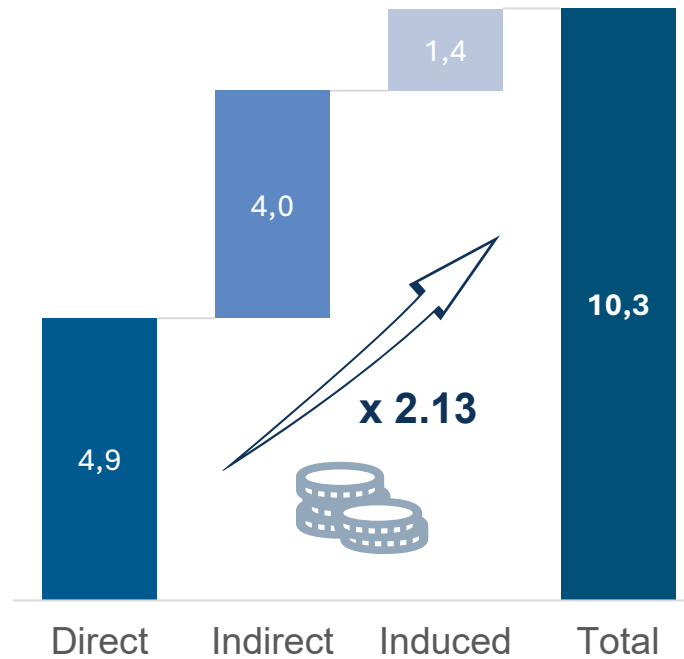
German Casting Industry: Strong backward linkages

Direct, indirect and induced Germany-wide effects of the foundry industry, 2025

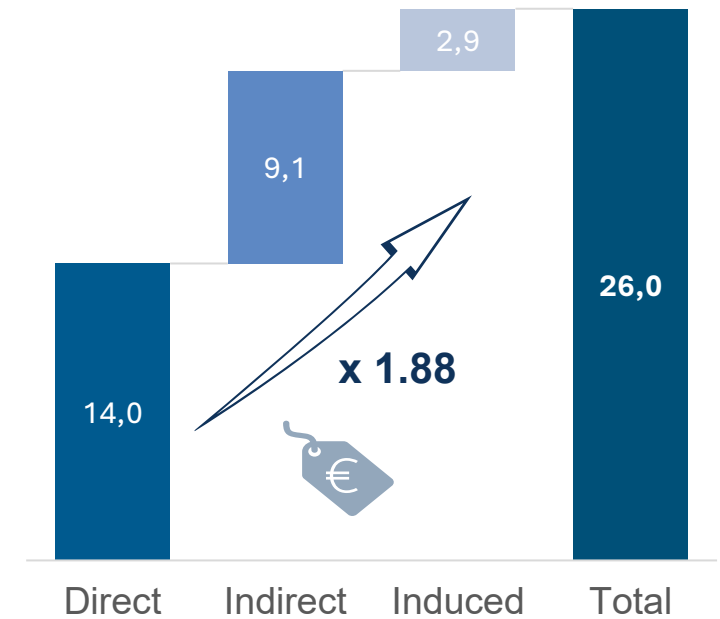
Job effects (in 1,000 people)



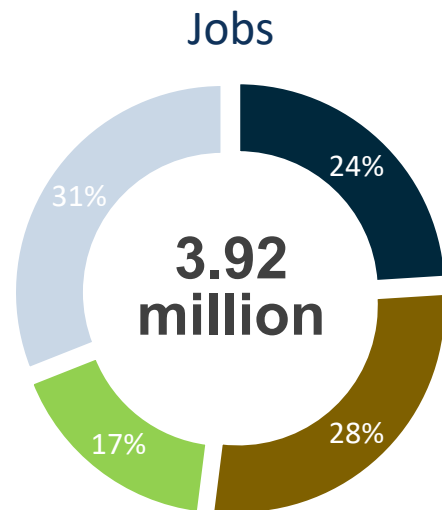
Value added effects (in € billion)



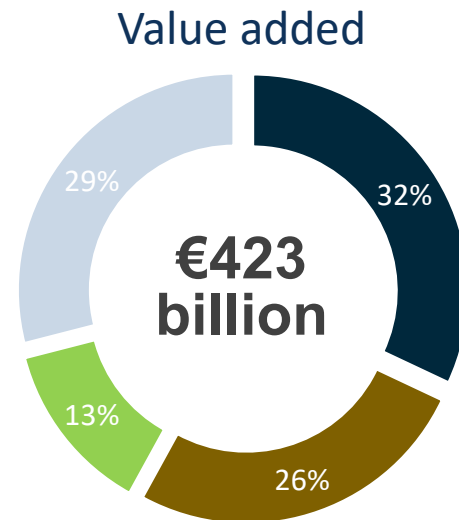
Effects on the value of production (in € billion)



Forward linkages: Foundries generate significant effects in a broad customer network



- **9 percent** of the total economy
- **36 percent** of industry
- Reach factor: **x 55**



- **12 percent** of the total economy
- **38 percent** of industry
- Reach factor: **x 78**



Reach Factor

55

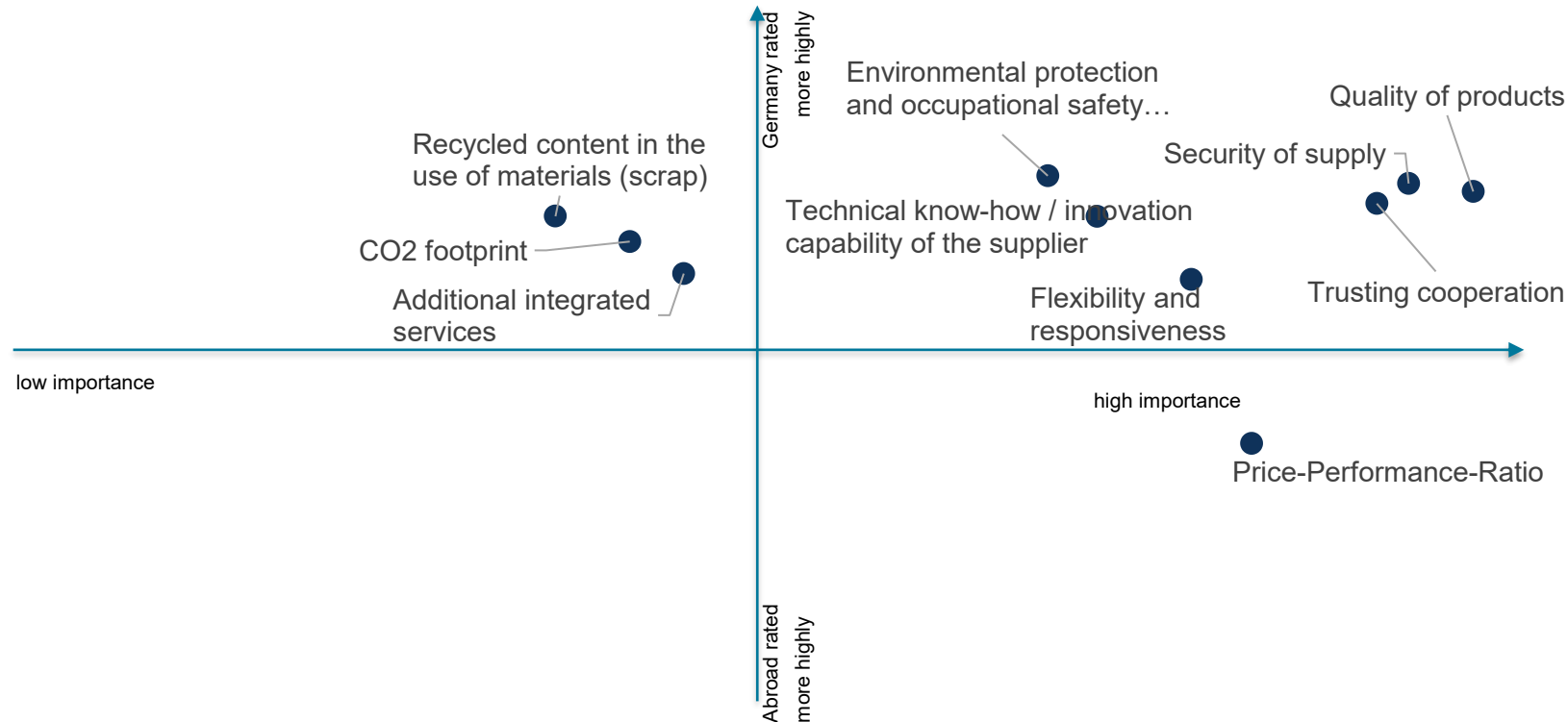
Every job in the foundry industry enables 55 jobs in customer industries.

Reach factor = Scope of customer network / Scope of foundry industry

Lessons from the Survey of Customers: Strength and Challenges for the German Foundry Industry

How important are the following aspects of casting sourcing to your business as a whole?

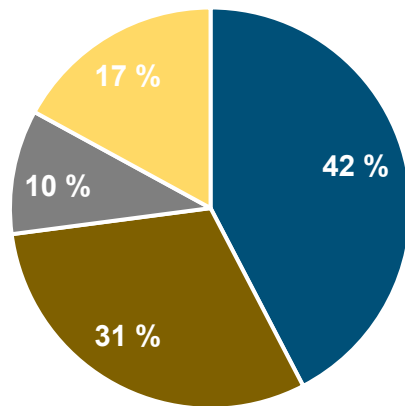
How do you assess these aspects in comparison between castings sourced in Germany and castings sourced from abroad? /



- The German foundry industry still has many **strengths**: quality, supply security and cooperation.
- But it no longer **scores as well on price-performance** compared with international suppliers.
- **Sustainability aspects** currently carry less weight with customers than with policymakers.

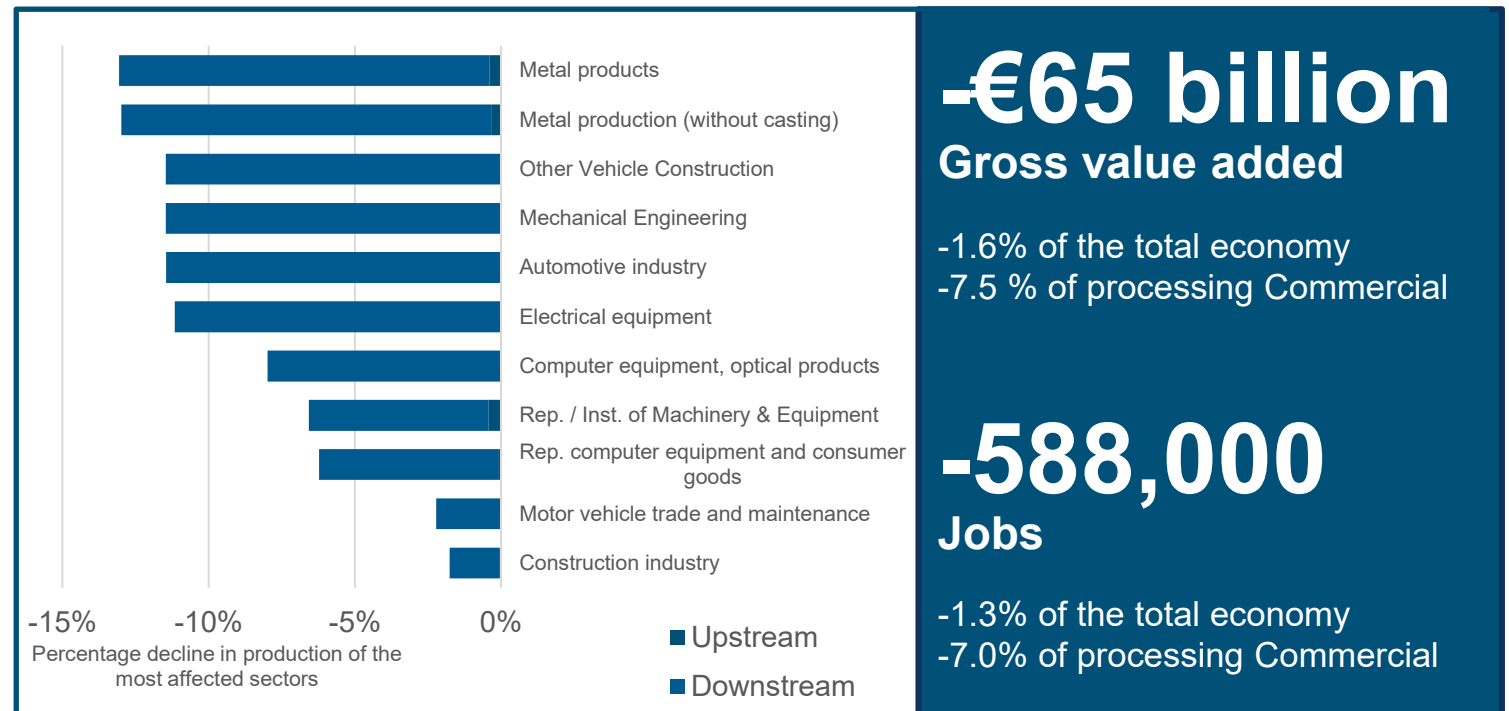
German foundries only substitutable to a limited extent: further weakening leads to severe economic consequences

Substitution of German castings difficult for three-quarters of companies



- Not possible at all
- Possible to a limited extent
- Mostly possible
- Fully possible

Sectoral and macroeconomic impact of a 50 percent decline in domestic casting production



Summary of the Key findings: The foundry industry is a strategic pillar of Germany's industrial resilience

Three central findings of the study

01



Deeply embedded in the value chain

Closely interlinked both upstream, through inputs and supplies, and downstream, through broad customer networks.

02



A source of social stability

Foundries secure employment in rural regions and provide well-paid industrial jobs.

03



Its loss would hit far beyond own sector

Losing the foundry industry would cause severe economic damage across the wider economy.

Overall economic resilience also depends on a strong foundry industry