



# Unique.

Business Report October 2020 – October 2024



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# Unique.

## **Dear members and friends of the machinery and equipment manufacturing industry,**

being unique is a tall order. But there are many reasons why we can confidently call our industry and its association “unique”. Not only because mechanical and plant engineering is unique in its diversity of technologies and solutions and many of our products set standards worldwide. Our companies, with their deep regional roots across Germany and Europe, are also special as employers: we remain loyal to our locations because this loyalty also reflects a special appreciation of our employees and their achievements.

With over 3600 member companies, the VDMA can also call itself “unique”: This makes it not only the largest industrial association in Germany, but also the largest network in the European machinery and equipment manufacturing industry with around 380 member companies. The VDMA is also a unique centre of expertise for all topics relating to its member companies, bringing them together for important technological developments such as OPC UA or Manufacturing-X and lobbying for them both in front of and behind the scenes.

And this commitment has increased significantly over the past four years, as we now live in a world characterised by wars, crises and increasingly moving away from open borders and free trade. The mechanical and plant engineering industry has taken on and mastered these enormous challenges with strength, innovation and flexibility. We are also a key player in the major transformation tasks facing our world; without our products and solutions, neither the climate targets will be achieved nor digitalisation successfully shaped.

So we have every reason to say:

“The machinery and equipment manufacturing industry and its association are unique.”

With best regards



Karl Haeusgen  
VDMA President

## “Powerful – Forward-thinking – Relevant”

**Mechanical and plant engineering is a very special industry, and the same applies to the network that the VDMA maintains with its member companies: the largest industrial employer in Germany and Europe, the largest industry association with more than 3,600 members.**

This is the machinery and equipment manufacturing industry: globally successful, present in all important foreign markets. A technological pioneer with enormous solution expertise, which is absolutely necessary to fulfill the major transformation tasks. Significantly supported by the broad knowledge of an association that sees member-centricity as the core of its work. “We are unique” – such a self-description and such a promise of performance does not come easily to entrepreneurs in an industry that is typically characterised by medium-sized, family-run companies. But the mechanical and plant engineering sector proves every day that it can live up to this claim. And the VDMA can also point to a wider range of services than anyone else in the world of associations. That is why we have given this annual report the motto: **“Unique.”**

But if you want to be unique as an association for your member companies, you can't just concentrate on offering a particularly large and good portfolio of services. Rather, it starts with scrutinising oneself and constantly reviewing the standards by which one acts: Do we have our finger on the pulse, do we recognise the needs of our members and do we have the right strategies to represent the machinery and equipment manufacturing industry and its companies both in front of and behind the scenes and to fight for their competitiveness? This is especially true in view of the steadily growing number of European member companies that have joined the VDMA network from Austria, Poland, Italy, the Benelux countries and other countries.

A few years ago, we launched our INSPIRE change programme in order to improve ourselves. Based on the major changes in the world that affect all companies equally, we have set ourselves the goal of transforming the complex VDMA institution into a more powerful and flexible network organisation under the motto: **“Together.Better.OneVDMA.”** (More on this in the following article.) Digitalisation plays a major role in this. However, the focus is much more on the realisation that the enormous challenges posed by i.e. climate change, demographic developments and the current geopolitical crises also require an association to change itself in order to continue to be the best companion for its members in their day-to-day business.

However, this not only requires a clear picture of which specific projects are being implemented under the umbrella of INSPIRE that are intended to improve the association's services for its members. We also need clarity about the values that guide us in our daily work. At the turn of the millennium, the VDMA already went through such a comprehensive process once before; at that time, the aim was to bring the many mostly independently operating trade associations under a genuine common brand strategy.

At that time, the logo with the striking colours petrol and orange, which is still valid today, was created, as well as our core values, which were further developed in 2015:

**“Powerful – Pioneering – Hands-on”.**

Now it was time to re-evaluate these core values. Are they still suitable for a world in which there are fewer and fewer certainties, the pace of change is accelerating and “VUCA” (volatility, uncertainty, complexity, ambivalence) is the generally accepted description of the situation? Or do adjustments need to be made because the organisation and its employees have also changed?

We have pursued this question with numerous analyses, workshops and discussions, both internally and together with member companies and other reference groups. The question of our working principles played just as much a role as our understanding of the VDMA brand or our guiding principle. We put our own DNA to the test, so to speak, and scrutinised it. It became clear that one of our core values still fits very well, but that two others need to be adapted in order to meet the demands of our member companies and our own in the future.

#### **“Powerful”**

We are still committed to this attribute because it cannot be any other way. The machinery and equipment manufacturing industry has to prove itself every day in the face of tough global competition and demonstrate its strengths – and this is no less true for the association that supports it in this endeavour. “Changing the world” is the claim that both companies and the VDMA want to fulfil

#### **“Forward-thinking”**

On the one hand, this emphasizes that the member companies will receive all the essentials from their association and that, like a scout, we recognise all the challenges facing our industry at an early stage.

On the other hand, we also recognise that in a “VUCA” world, there is generally not just one solution that shows all member companies the same way ahead.

#### **“Relevant”**

We want to be the point of contact for as many questions as possible that, when looking for answers, a member company immediately thinks of. We offer market expertise, interpretation aid, networking, lobbying and personalised advice. We remain focused on member’s daily business, but we want to provide even more.

These three revised core values “Powerful – Forward-thinking – Relevant” also stand for further mandates that we want to fulfil in the interests of our members:

- We want to create added value by representing the interests of the mechanical engineering industry in all relevant German and European committees, recognising trends and new topics at an early stage, giving practical knowledge and providing answers to the challenges of our time.
- We want to connect people by bringing together the right players and communicating perspectives, learning from each other by sharing experiences and offering everyone a common platform.
- We want to live progress by shaping a better future together with the help of technology.

Our new core values are the central building blocks for further developing the VDMA as part of its INSPIRE programme and maintaining its importance for member companies as an indispensable partner. Indispensable because it is a unique collaboration that companies and the association maintain with each other. “Unique.” in the best sense – as a description of the status quo as well as a promise of performance.

# INSPIRE

## “Together.Better.OneVDMA.”

“Change” – that’s the world we live in. A world in which even a traditional, medium-sized industry and its association have to adapt to change ever more quickly.

“Change” – this is also a call to change. Companies in the machinery and equipment manufacturing industry have to react ever more quickly to new technological developments and customer requirements, as well as to further European regulations, growing trade conflicts and global supply chain disruptions.

And the VDMA itself is also changing for its members, recognising new needs and enlarging its range of services and processes. “Change” has become a permanent state of being for us, with the aim of continuously providing our members with better services. Our change programme has a name: INSPIRE. And a guiding principle: “Together. Better.OneVDMA.”

“Change” is uncomfortable at first – even for an association that is at the forefront of industrial network organisations in Germany and Europe with more than 3,600 members. That is why we have a clear focus: the VDMA wants to strengthen the competitiveness of its members and thus help to secure the future of mechanical and plant engineering. We have a long tradition in this. For more than 130 years, the VDMA has successfully promoted innovation and accompanied its members into new markets. We drive forward standardisation and norms and take care of training and securing skilled workers. And in the past four years in particular, the range of tasks for members and the association has expanded enormously: Sustainability, the circular economy and climate-neutral production are new challenges for which we are working with member companies to develop possible solutions.

INSPIRE is also a value proposition from the association to its members. In the digital age,

companies expect the VDMA to make its knowledge, services and performance available to them at any time and in a customised form. To this end, we use the many opportunities offered by digitalisation. Just like our member companies, we also scrutinise and optimise our processes and products.

This is because we want to become even more forward-looking in our collaboration with our members, in our range of services and in our internal cooperation. In doing so, we are also strengthening the VDMA’s unique network – both in personal contact and in the digital world. For us, it is always about creating a connection between people who work together for a strong, innovative mechanical and plant engineering industry. In this way, we are continuously expanding the performance promise that the association has been making since 1892.

## “Change” has become a permanent condition for us.

INSPIRE requires both courage and openness from everyone involved. “Change” also causes uncertainty in every organisation because familiar processes, structures and hierarchies are called into question. This is why we have introduced new formats such as INSPIRE town halls and roadshows in order to explain the change and get colleagues excited about it. Employees support the change process as “change agents” with a critical and constructive view.

We have also trained “agile coaches” who provide cross-divisional support for change projects. After all, feedback and participation from all VDMA employees are essential for success. INSPIRE is therefore primarily a cultural change for everyone involved in the VDMA.







For an association with historically grown structures and a strongly decentralised orientation, this is a far-reaching change. We are questioning what we are used to, we want to reach a higher level.

The association and its member companies benefit from this in equal measure. We have started with a series of “future workshops” that have prepared the ground for new services and offers. In our INSPIRE Talks, new projects are discussed and explained across the board. Colleagues are thinking and working in an increasingly agile and cross-divisional network. “Get out of the silos” – this call has characterised the organisation for several years. At the same time, new digital processes are intended to give employees more freedom to provide even better personal support to members.

**We are questioning what we are used to, we want to reach a higher level.**

Where do we stand with INSPIRE? It was a bumpy start – the coronavirus pandemic has really shaken up our “change” schedule, too. Some sub-projects had to wait because Corona suddenly had consequences that literally kept an entire nation, indeed the whole world, on tenterhooks. But we have nevertheless launched more and more new products in recent years and made them available to our members.

This can be experienced in particular through our Internet presence, which is far more than just a simple website: the OneVDMA platform. Many other new offers are in the pipeline. We therefore invite you to join us on the road to the next milestones. “Together.Better.OneVDMA.”

# Five Megatrends are Changing the World

**INSPIRE is our transformation programme to set the course for the future of the VDMA.**

Our compass and signpost is the INSPIRE target image. In order to create this target image, we looked at two questions in great detail: Which megatrends will change the strategies and business models of companies in the mechanical and plant engineering sector in the short and medium term? And how can the VDMA support its member companies in these upcoming change processes efficiently, effectively and profoundly?

Mechanical and plant engineering also has to face a transformation that is characterised by five megatrends - we call them the “5Ds”.

## **1. Digitalisation** **Managing the digital flood of knowledge**

Our society is developing ever faster into a digital information society. More knowledge is available on the internet at any time than a person or company could ever keep track of.

Users are generally well equipped with basic information themselves. Simply making this knowledge available on demand would fulfil neither the requirements of our members nor those of the VDMA. The added value of digitalisation only comes from the intelligent processing of this flood of knowledge. By processing, analysing and linking the available data, by critically questioning and meaningfully supplementing it.

And that as quickly as possible, because digitalisation is changing the desired reaction time. This applies both privately and professionally in working groups, companies and associations. We are becoming impatient, we are constantly “online”. Current developments should be checked for facts almost in real time and made available digitally in a clear format. New, relevant services should also be available “24/7” in the shortest possible time. The demands on the delivery of services are becoming ever greater.

The VDMA is standardising key processes in order to not only provide digital services but also to constantly optimise them. This task has no time limit. Because just as competition in our industry is driven by data generation and utilisation, we are constantly developing new projects to support our members.

We all know that: Intense international competition is displacing traditional structures and approaches. Business models are not only changing - some are becoming obsolete. For our member companies and for the VDMA, this presents not only risks, but also opportunities.

The VDMA is utilising the technical advances in data management as an opportunity. The better we are digitally positioned, the more new digital product formats we can offer our members. For example, we have brought together around 50 different portals on the OneVDMA platform. What’s more, configurable standard reports, individual key figure dashboards, automated invitation management, a platform for market and economic information and a data warehouse are further examples of our own digitalisation. We are therefore providing more customised information than ever before. In doing so, we are creating the basis for the next step: artificial intelligence will continue to profoundly change our work.

## 2. De-Risking

### The world is reorganising itself

The world has experienced significant crises in recent years. The coronavirus pandemic with the temporary collapse of supply chains and the war in Ukraine with its consequences for the energy markets are still impacting companies today. More and more economies that were previously closely intertwined are becoming disconnected. This is reason enough to develop resilience and reduce mutual dependencies, with negative effects on the international division of labour and cost structures. Industries that operate successfully internationally are particularly affected, including mechanical and plant engineering. Many companies in our industry are market leaders or technology leaders in their respective fields. Over the years, they have opened service and production facilities around the world and established themselves where their markets are, where they find the best production conditions or where their customers have called them.

Will they still be able to do this to a similar extent in the future? The geopolitical changes of recent years, in particular the growing conflict between the USA and China and Russia's aggression, are leading to systemic competition that is generating more and more protectionism. This not only makes global trade more difficult, but also leads to different technological and regulatory standards.

**The geopolitical changes of recent years are leading to systemic competition that is generating more and more protectionism.**

Companies that were previously able to rely on multilateral rules now have to take a multi-track approach and invest in several regions or increasingly focus on selected economic areas. This is accompanied by considerable upheaval in the supply chains, as the painful experiences of recent years have shown.

Of course, every management team continuously adapts the strategic direction of its own company. However, current developments are forcing managers to think about more than just continuous adjustment processes. It is now a matter of





fundamentally looking at strategic orientations. Production, product portfolios, sales and technologies are being scrutinised. Strength is shown by those who open up new markets faster than their competitors in order to compensate for their risky business. If you want to successfully develop and implement a strategic repositioning, you need access to sound knowledge and up-to-date analyses faster than ever. The stakes are high, also for the German economy. In 2023, the entire European mechanical and plant engineering sector recorded an estimated turnover of 910 billion euros and a 28 per cent share of global machinery sales. The mechanical engineering companies in Germany alone increased their turnover to a record 263 billion euros in 2023 - partly due to inflation. Helping to maintain this strength in an increasingly fragmented world is one of the VDMA's core tasks.

**Helping to maintain this strength in an increasingly fragmented world is one of the VDMA's core tasks.**

### 3. Demographics

#### New networks serve new values

The "human production factor" is becoming a decisive success factor for companies. However, this resource is becoming increasingly scarce. The baby boomers will soon be leaving the mechanical and plant engineering sector. International specialists and workers are not yet able to fill the emerging gaps, even in purely mathematical terms.

In addition, younger decision-makers are used to working in network structures.

They have learned and internalised that in a highly dynamic environment, only those who can exchange ideas and cooperate with others – quickly, internationally and across industries – will survive. But even a network is no longer a bond for life. Younger decision-makers are less tradition-orientated and more benefit-orientated. They leave networks as soon as they no longer offer them any added value. Because long-standing relationships are therefore becoming more difficult and less frequent, the VDMA maintains its networks with particular care. At the same



time, sought-after employees are not always tied to one place of work and are increasingly willing to change employers. They seize their opportunities, as the next, supposedly better offer is often just a few clicks away on a job portal. If you are looking for new knowledge, new experiences and new professional challenges, (almost) all doors are open to you. Not only is it easier than ever before. The choice of different sectors is also growing in many professions and activities. After all, it's not just AI experts who are urgently needed almost everywhere.

In addition to digital affinity, this new generation of experts is also characterised by a desire for sustainability, time autonomy and a changed attitude towards the relationship between private and working life. As the largest industrial employer, the mechanical and plant engineering sector employs a total of around 1.2 million people in Germany and around 3 million in the 27 EU member states. Employers must adapt to this new set of values. In the competition for increasingly scarce specialists and managers, they are adapting their workplaces and job offers. Only companies that learn to deal with these demands will remain attractive employers.

#### **4. Decentralisation** **Responsibility, power and autonomy** **for the individual**

The internet, the social media universe, but also internal company networks and data systems are constantly providing new information. It pours in on users from various channels in a decentralised set-up. Each user also acts in a decentralised manner: they often process the new information autonomously and make their decisions based on it. This is also increasingly the case on the job, both in the association and in the member companies. This increases the responsibility of each individual to make decisions that are in line with the respective (corporate) objective.

In a highly dynamic world, this decentralised structure is definitely an advantage. It constantly offers new points of interaction with the "outside world". For companies, it is a necessary condition

for working in a solution-orientated and networked way and for permanently adapting the product range to actual requirements.

However, this also means that customers are increasingly gaining autonomy and market power! Companies must anticipate, analyse and fulfil their needs, challenges and specific solution requirements faster than before. The one-size-fits-all principle is becoming increasingly obsolete here, too.

The solution lies in a target group-orientated approach - both for the member companies and for the VDMA. Anyone who floods their customers with information will lose out; they only want relevant facts or services. The task of digitalisation is to quickly consolidate information from the user to the provider. Only those who organise and control their data and information systems in a uniform manner can score points with targeted fact distribution and consolidation.

**In a highly dynamic environment, the only way to survive is to be able to exchange ideas and cooperate with others – quickly, internationally and across industries.**

Digital platforms are becoming the focal point for dialogue everywhere. Whether it's between parents at nursery school, in local politics or at work: people come together quickly and easily on platforms to pool their interests. Once they have achieved their goals, they dissolve their interest groups again. This makes it increasingly easy to join and participate in a wide variety of networks, including temporary ones. Outdated network structures are simply replaced by better offers. After all, these are also just a click away on the internet.

## **5. Decarbonisation**

### **Pressure from all sides**

Consumers and customers, EU regulations and financial institutions are demanding that companies provide credible proof of their environmentally friendly behaviour. An annual sustainability report will soon be mandatory for almost every company. But it doesn't stop there, the pressure increases with every new product. Sustainability is thus becoming the guiding principle for our actions and our way of life, across all generations.

This offers enormous opportunities for mechanical and plant engineering. We can play a pioneering role worldwide. It is the innovative strength of this sector that enables other industries to achieve more sustainable production. According to the consulting firm BCG, products and solutions from the mechanical and plant engineering sector can save an impressive 86 per cent of greenhouse gas emissions in industrialised countries.

In order to act consistently and credibly, our member companies must rethink their entire value chains. However, the reorganisation and further development of production, resource and supplier management is not enough. It is also about securing financing under new, sustainable conditions while keeping an eye on running costs. The increasing "regulatory frenzy" of national and European politics is also driving change in companies. It is constantly important to find out which regulations are currently relevant, which could potentially be added and how all of this can be financed and realised within the company. Forward-looking management has always been a must, but it is becoming even more multifactorial, even more challenging. Managers benefit more than ever from up-to-the-minute information when developing new business models and strategic competences.

### The “5Ds” lead to six strategic focal points

As megatrends, the “5 Ds” are a major challenge for all companies. But they by no means cover all the changes that the mechanical and plant engineering industry is facing. The term “VUCA world” aptly summarises the mixture of increasing volatility, uncertainty, complexity and ambivalence. Dealing with geopolitical crises, raw material shortages or cyber attacks is just as much a part of the requirements profile for managers and specialists as the usual sales or production planning. The list of the unpredictable is long.

**It is always necessary to find out which regulations are currently relevant and which could possibly be added.**

Changing framework conditions require a changed strategic focus - this also applies to us in the association. This results in an adapted and improved range of services as well as changed working methods within the VDMA.





## INSPIRE – the Strategic Focus

**We are setting new standards with our INSPIRE programme. The programme focuses on six strategic priorities in order to provide our member companies with the best possible support.**

We are modernising our structures, forming cross-divisional, interdisciplinary teams and using our resources more efficiently. The aim is to completely reorganise our services. To achieve this, we are reorganising our “production” as a service provider on a large scale. Our member companies produce machines and systems, we are the service provider that provides them with the services they need with the help of digitalisation and cross-divisional collaboration.

To this end, we have defined six strategic priorities.

Three of them lay the foundation for the reorganisation by creating the internal conditions for it. These include cultural change and information and data management. The other three projects develop concrete end products for our members, such as market and economic analyses.



**Strategic focus 1:**  
**We deliver “best in class” offers**

Our primary goal is to provide our member companies with a “best in class” range of services. This is not just about “trouble shooting”, but about having our ear to the market at all times. With a clear focus on member-centricity, we measure our portfolio not only against the offerings of other industry associations, but also against those of consulting firms. Our aim is to offer all association members customised services and advice. In addition to continuously measuring member satisfaction, we utilise improved tracking of user interests and our service and product database, for example. We want to enable our members to achieve a faster “time-to-market” by providing them with the information, topics and trends they need to overcome their challenges.

**Our aim is to offer all association members customised services and advice.**

In future, we want to offer every product in our range of services digitally. The OneVDMA platform is the centrepiece of this reorientation. It is a networking center par excellence and therefore a central element in the INSPIRE transformation process and the basis for many other end products and member benefits.

**Strategic focus 2:**  
**We are digitalising our association’s work**

Constantly evolving digitalisation is our most important tool. It enables us to work in a system- and data-based way. Standardised processes and methods, shared, workflow-supported IT systems and platforms are crucial to our success. Not only do they open up new ways of working together, they also enable VDMA employees to organise their network digitally via the OneVDMA platform. At the same time, we have also opened up the hybrid meeting world for our network alongside the digital and face-to-face world and established new, interactive exchange formats.

We have already made great progress in meeting the technical requirements for digitalisation and member centricity, a truly enormous task. Since 2021, we have redesigned several dozen individual websites into an interactive portal. We have systematised 2,000 service modules for our 50,000 member contacts, designed 200 topic pages and expanded their content. In addition, more than 200 collaboration groups were created in a short space of time. They offer simple, modern access for exchanging information on current issues as well as joint document processing – naturally taking into account all compliance requirements.

Despite our intensive work on the realignment, we have not lost sight of our core business. On the contrary. Over the past three years, we have been able to expand the network of VDMA member companies to a good 3600 companies in total. A record result that makes us proud. More digitalisation does not mean less personal: its network of experts is what sets the VDMA apart.

**Strategic focus 3:**  
**We manage member needs with a system**

In 2023, we increased speed and now we are stepping up a gear: our systematic member management is increasingly taking shape. It is a multi-layered and holistic project that encompasses product development, recommendation management and the user experience of our members. It is our key to offering every member exactly the service they need - and to being attractive to new members.

**We join forces across borders for an economically strong European mechanical and plant engineering industry that is heard in Brussels and Berlin alike.**

This is also important, as a broader, European membership base gives us a better starting position. In this way, we can join forces to fight for a strong European economic area and actively utilise market upheavals in mechanical and plant engineering for the benefit of our members. And last but not least, a broader membership base ensures a solid financial basis for the association and increases its impact. This goes hand in hand with the professionalisation of our sales throughout Europe. Here too, the association has created new, overarching structures that will pay off in the coming years.

**Strategic focus 4:**  
**We are pushing ahead with Europeanisation**

The VDMA is more than just a leading German industry association. We are an association with a European focus and a growing network. We join forces across borders for an economically strong European mechanical and plant engineering industry that is heard in Brussels and Berlin alike – for example, when it comes to standardisation and regulation, a common European power grid or the conclusion of new free trade agreements.

The VDMA not only has an office in Brussels, at the heart of the European Union, to represent the interests of the mechanical and plant engineering industry. We also have European country offices in Bologna, Maastricht, Vienna and Warsaw. Our colleagues there know what the local mechanical and plant engineering companies' needs are and which VDMA services and events they can use to provide concrete help. More than 380 companies in the EU (excluding Germany), the EFTA area and the UK are already part of the VDMA family and the number is growing all the time. In this way, the VDMA's international network continues to grow – to the benefit of all members.





**Strategic focus 5:  
Early indicators - knowing what's coming**

Having knowledge means having a head start. Only those who know the right early indicators can react to changes in good time. We are called upon to provide our member companies with these insights in a timely and precise manner. Our range of services is extensive and will continue to grow: market and economic analyses are just as much a part of this as our Government Relation Management, which brings members into direct contact with their elected representatives more effectively.

We want a powerful political community. Our most important target groups are VDMA members and members of the German and European parliaments from their respective constituencies. However, our campaigns can also be aimed at the German government, the European Commission, authorities, think tanks or the politically interested public.

Just like new technologies and their regulations, we also keep an eye on economic policy legislation and lobby on behalf of our members. We know that early information is a competitive advantage for companies, which can then be well prepared and react quickly.

And when the time is right, we also organise joint protests with other associations, for example against supply chain legislation or an all-encompassing ban on PFAS. Or we position ourselves in the day-to-day political debate in favour of our free and democratic economic and social system and against extremist forces.

**Strategic focus 6:  
We network thematically**

Effective and efficient service for members also means that we need to take the exchange of information within the association to a new level. This is why we are driving forward cross-divisional and cross-sector collaboration and the resulting innovation processes within the VDMA.

We utilise the knowledge of all employees across existing structures. The topic-centered content-pages of the OneVDMA platform are now managed by cross-departmental editorial teams. This allows member companies to access our content in a comprehensive and technically sound manner.

**We utilise the knowledge of all employees across existing structures.**

In addition, there are more and more topics that affect the entire mechanical engineering industry and that cannot be dealt with by individual trade associations or departments alone: The comprehensive PFAS ban desired by the EU, for example, has led to a large, joint information and lobbying offensive. The “global language of production” (OPC UA) is being supported by more and more trade associations and is firmly established in our industry. And the Manufacturing-X data room project, which the VDMA is coordinating, can only succeed with a large number of participating companies. In short, we think and act in an interdisciplinary way.

**We meet on the OneVDMA platform**

All of this needs a suitable place where members and the association can meet and services can be provided. This is precisely why we have created the OneVDMA platform, the centerpiece for the reorientation of our association business. It is a virtual marketplace. Here, our members can also carry out every interaction with the association and with other members digitally. We are thus creating “24/7” access to the constantly updated VDMA range of services exclusively for members.

**This is the place where people can network quickly and easily in groups and work together on solutions.**

On the OneVDMA platform, we present our complete range of services, thematically bundled and made transparent via search functions and overview pages. The platform is also deliberately open to external interested parties. As the voice of the mechanical and plant engineering industry, we want to reach out not only to our member companies, but also to the press, the public, politics, science and research. And for their part, these groups should be able to communicate with us in an uncomplicated manner. After all, external voices and ideas also contribute to the development of industry solutions. This is why each interest group can move freely across parts of the platform and set up their own personal information area.

We take a different approach with our exclusive offers of information, analyses and events. They are only provided for our member companies. We provide customised information. This is a challenge for the VDMA, as we unite different industries, regions, functional areas, company sizes and hierarchical levels under one roof. We want to satisfy the CEO just as much as the head of development, the person responsible for business development or the technology expert. Our portfolio of member contacts is as diverse as the information needs of the individual in the company.

Each of our 50,000 member contacts can configure their own personalised OneVDMA experience. We offer more than just individual prioritisation of benefits and services. Of course, direct access and a personalised calendar with VDMA appointments can also be set up on the platform. But OneVDMA is also a meeting place. This is the place where people can network quickly and easily in groups and work together on solutions.



# Our Milestones on the Path to Digital Transformation

**We have already reached many milestones since the launch of INSPIRE. But our ambition remains high.**



Every new project or product must offer our member companies individual added value. After all, the world around us is spinning ever faster and is constantly presenting us with new challenges. Two projects on which we have placed particular focus in 2023 and 2024 are key examples:

The market & business cycle products (M&C) can now be displayed digitally and personalised via the OneVDMA platform. In this way, we provide our member companies with a personalised, up-to-date and detailed insight into the world of figures in machinery and equipment manufacturing. The key economic figures are presented in interactive charts and tables.

## **VDMA members receive more valuable information with less effort.**

In April 2024, we also conducted a VDMA-wide economic survey for the first time. This is one of our flagship projects. All previous economic surveys of the association's trade and regional associations were summarised in one survey. We launched a cross-divisional process and digitally recorded more than 4,000 participants. In this way, we are further expanding our primary surveys. Our members not only avoid multiple reports. They now have an overview of the economic situation and development of the mechanical and plant engineering sector and its sub-sectors for each quarter. These reports can be compared with each other in terms of methodology and content.

The VDMA provides assessments of developments in regional markets worldwide, sales opportunities in relevant customer sectors and important early economic indicators. We report on sales expectations, investments, human resources and much more. For our member companies, this means, in line with INSPIRE, that they receive more valuable information with less effort.

At the beginning of 2024, we introduced the digital photovoltaic incoming orders/turnover report as a prototype. This configurable standard report impressed users with its interactive graphics and many functions. More and more trade associations are planning to map such reports via the new M&K platform. We also want to be able to offer surveys in the European regions by the end of 2024.

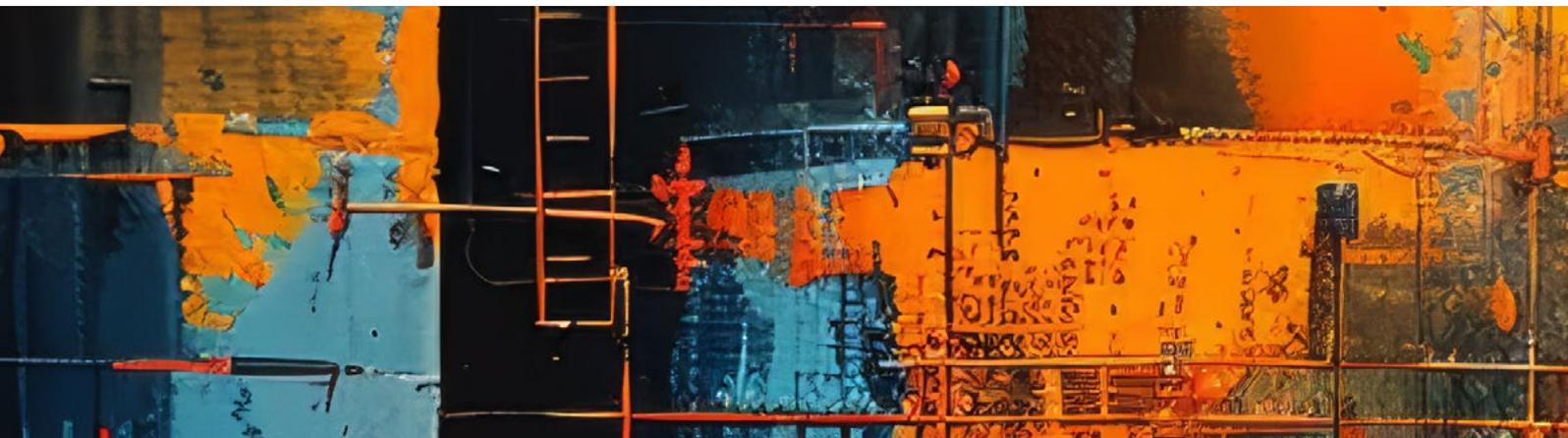
We will also introduce some new display formats for secondary data. We are starting the process with member workshops and in-house requirement workshops. The focus here is also on the needs of users. The result will be better preparation and presentation of information on international foreign trade data, production statistics and statistical databases.



We also took a big step forward in our distribution processes in 2024. Because the OneVDMA platform offers all interested parties a basic range of products that can be accessed digitally, we can recognise more quickly who is using which information. This will enable us to serve all channels in a more segment-orientated way in future. In this way, the INSPIRE distribution project has evolved into an “overall VDMA sales system” for which we are pooling our strengths across all divisions.

We create the necessary organisational framework and deploy our energy in a more targeted manner.

And because association work not only means serving our members in the best possible way, but also promoting the performance of the mechanical and plant engineering industry to the public, we are also continuously expanding our range of services in this area. For example, with the redesigned presence of the VDMA magazine on the OneVDMA platform – a modern print product is being congenially complemented in the online world.





### And the pipeline is well filled

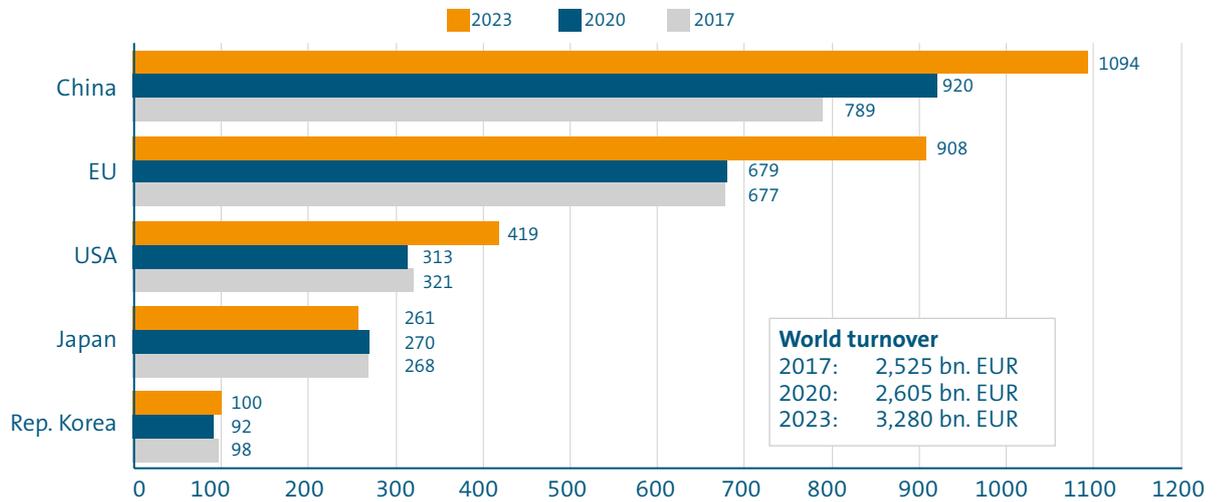
A lot has happened at VDMA in recent years. Our employees and managers have developed with great commitment and at a rapid pace. The technical and organisational foundations of the INSPIRE programme are in place. We take feedback seriously and respond to it.

More importantly, our pipeline of ideas and projects is still well filled. And it will stay that way. Because in times of constant change, our further development as a service organisation is right at the top of the agenda. Always true to the motto:

**“Together.Better.OneVDMA.”**

## World machinery turnover: China, EU27, USA, Japan, Republic Korea

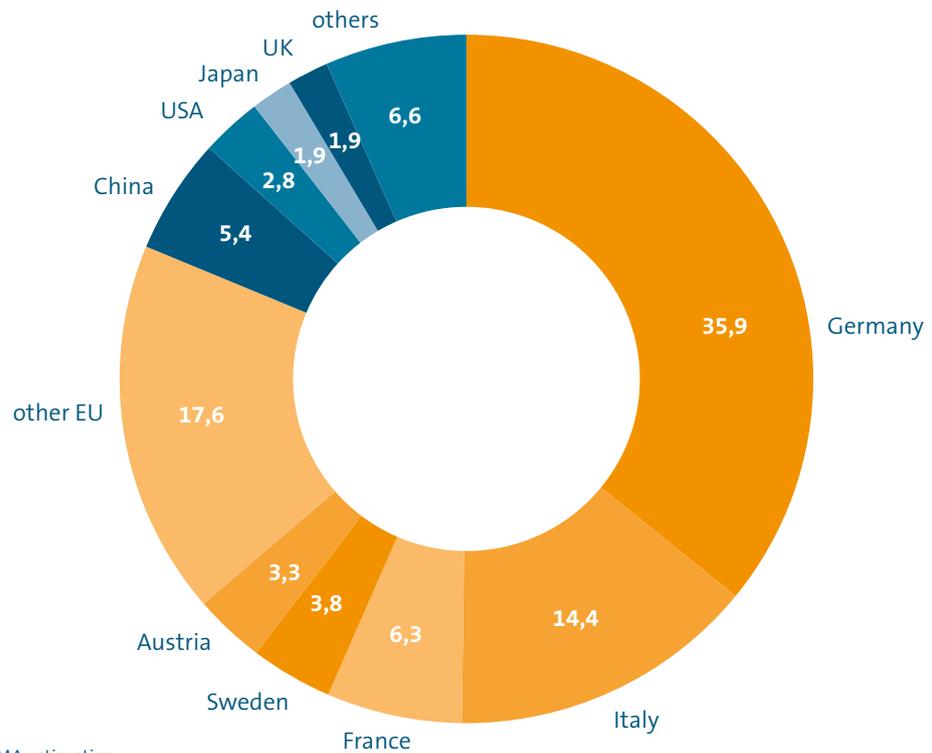
In bn EUR, mainly estimated



Source: VDMA estimations based on National Statistics, Eurostat and UNIDO

## EU27: Machine sales by origin

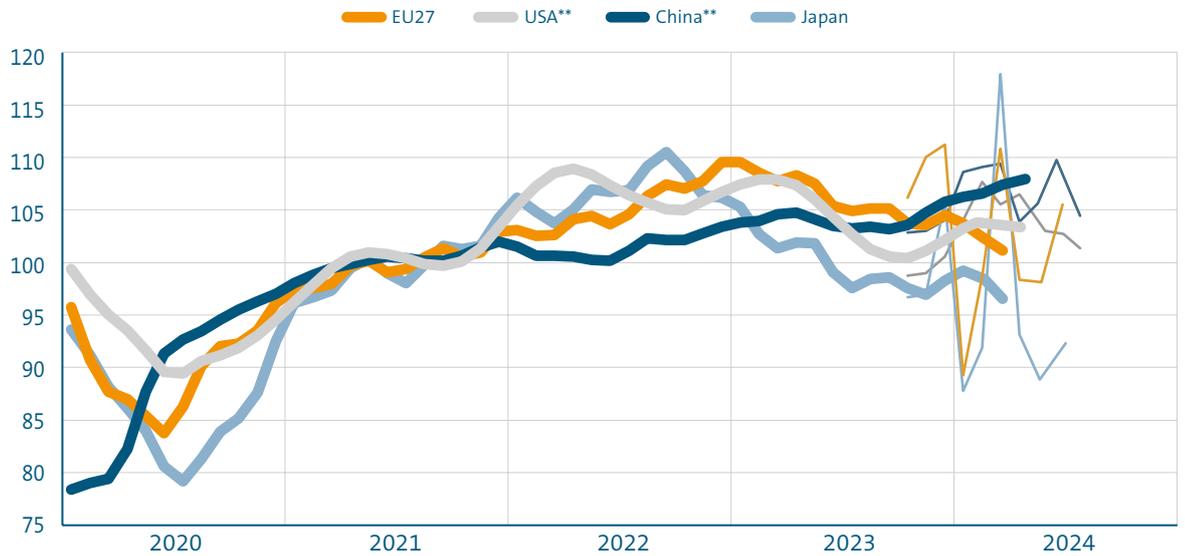
2023, Shares in %



Source: VDMA estimation

## Development of machinery production in key countries

Volume index\*, 2021 = 100 and 6-months moving average



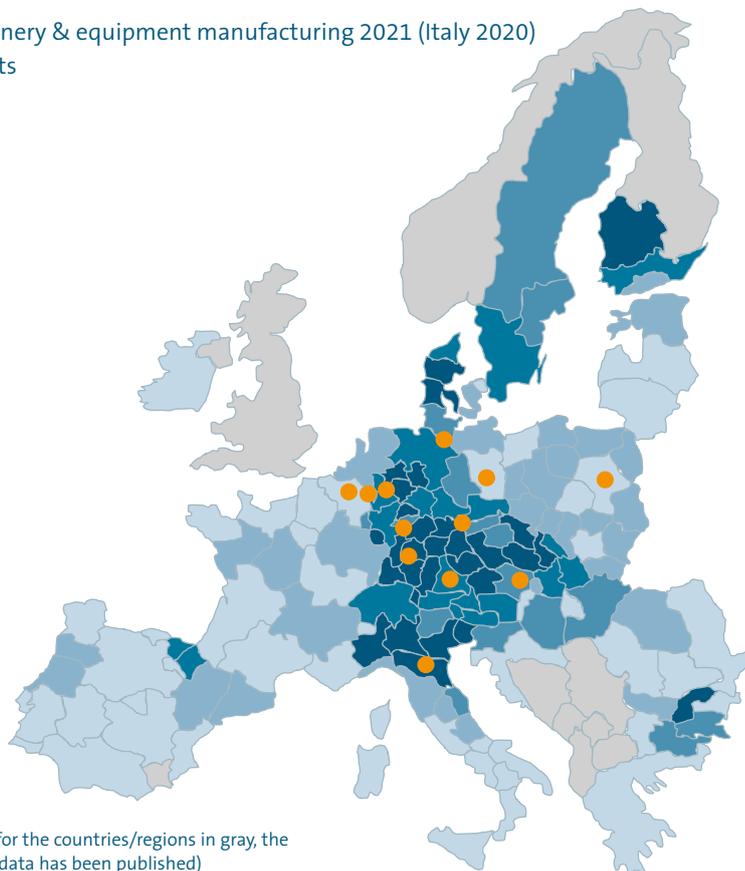
Source: Eurostat, National Statistics, Macrobond, VDMA

\*) NACE rev. 2 28. \*\*Seasonal adjusted

## Employees in the machinery and equipment manufacturing industry in Europe

Employees in machinery & equipment manufacturing 2021 (Italy 2020) per 1,000 inhabitants

- under 3
- 3 – 6
- 6 – 9
- 9 – 12
- above 12
- VDMA locations



Source: Eurostat, VDMA (for the countries/regions in gray, the data is confidential or no data has been published)

## Departments

Business Advisory  
 Communications  
 Computer Science  
 Economics and Statistics  
 Education Policy  
 Environment and Sustainability  
 Finance and Controlling  
 Foreign Trade  
 Human Resources  
 Informatics  
 Insurance  
 Internal Administration  
 Legal  
 Machine Information Interoperability  
 Membership Management  
 Taxes  
 Technical Affairs and Standardisation  
 Traffic

## Political Representations

Capital Office Berlin  
 European Office Brussels

## Regional Subsidiaries

Baden-Wuerttemberg  
 Bavaria  
 Center  
 East  
 North  
 North Rhine Westphalia

## VDMA country offices

### Austria

Vienna

Chairman: **Dr Markus Baldinger,**

Pöttinger Landtechnik GmbH, Grieskirchen (since March 2022)

**Dr Thomas Berndorfer,**

TTTech Industrial Automation AG, Vienna

**Stefan Bogner,**

Wacker Neuson Linz GmbH, Hörsching

**Martin Braun,**

Braun Maschinenfabrik Ges.m.b.H., Vöcklabruck

**Alois Burgstaller,**

Scheuch LIGNO GmbH, Mehrnbach

**Dr Gerhard Dimmler,**

ENGEL AUSTRIA GmbH, Schwertberg

**Dr Thomas Dopler,**

AICHELIN Holding GmbH, Mödling (until November 2022)

**Michael Fuchshuber,**

STIWA Automation GmbH, Attnang-Puchheim (coopted May 2023)

**Michael Lackner,**

Lindner-Recyclingtech GmbH, Spittal an der Drau

**Dr Heinz Leitner,**

Komptech GmbH, Frohnleiten (until March 2024)

**Thomas Lutzky,**

PHOENIX CONTACT GmbH, Vienna

**Michael Mehnert,**

BEKUM Maschinenfabrik Ges.m.b.H., Traismauer

**Mag. Alexander Melkus,**

SIGMATEK GmbH & Co. KG, Lamprechtsausen

**Mag. Martin Mühlbacher,**

Innio Jenbacher GmbH & Co OG, Jenbach

**Michael Reisner,**

AICHELIN GmbH, Mödling (from May 2023 to November 2023)

**Dr Joachim Schönbeck,**

ANDRITZ AG, Graz

**Felix Sorger,**

FWM Förderanlagen GmbH, Kirchstetten

**Dr Christoph Steger,**

ENGEL AUSTRIA GmbH, Schwertberg (until January 2022)

**Holger Streit,**

Liebherr-Werk Nenzing GmbH, Nenzing

**Rudolf Vogl,**

König & Bauer GmbH, Maria-Enzersdorf

**Rainer Weingraber,**

Wittmann Battenfeld GmbH, Kottlingbrunn

Managing Director: **Mag. Georg C. Priesner**

### Benelux

Maastricht

### Italy

Bologna

### Poland

Warsaw

## VDMA International

### Brazil

- São Paulo

### China

- Beijing
- Shanghai

### India

- Bangalore
- Kolkata
- Mumbai
- Delhi/Noida

### Japan

- Tokyo

### Russia

- Moscow (until December 2023)

### United States

- Chicago
- Washington

## Trade Associations

Additive Manufacturing  
 Agricultural Machinery  
 Air Handling Technology  
 Building Automation and Controls  
 Cleaning Systems  
 Compressors, Compressed Air and Vacuum Technology  
 Construction – Equipment and Plant Engineering  
 Electrical Automation  
 Electronics, Micro and New Energy Production Technologies  
 Engines and Systems  
 Firefighting Equipment  
 Fluid Power  
 Food Processing and Packaging Machinery  
 Large-scale Plant Engineering  
 Lifts and Escalators  
 Machine Tools and Manufacturing Systems  
 Materials Handling and Intralogistics  
 Measuring and Testing Technology  
 Metallurgy  
 Mining & Minerals  
 Plastics and Rubber Machinery  
 Power Systems  
 Power Transmission Engineering  
 Precision Tools  
 Printing and Paper Technology  
 Process Plant and Equipment  
 Pumps + Systems  
 Robotics + Automation  
 Security Systems  
 Software and Digitalization  
 Textile Care, Fabric and Leather Technologies  
 Textile Machinery

Valves

Waste Treatment and Recycling Technology

Welding and Pressure Gas Equipment

Woodworking Machinery

## Working Groups, Forums and Committees

### Working Groups

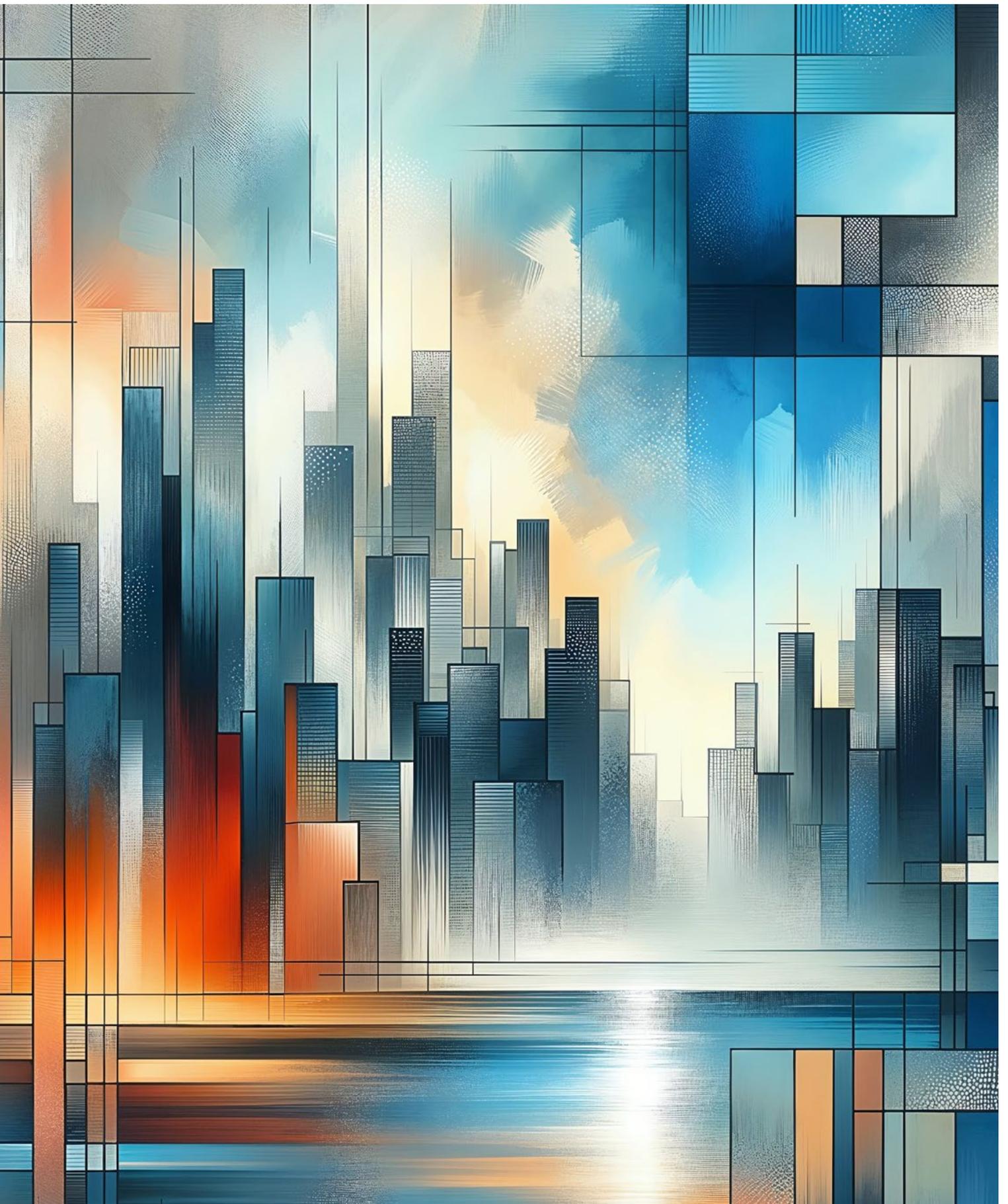
Additive Manufacturing  
 Building Information Modelling - BIM Building Automation and Electrotechnology  
 Earth-Moving Machinery  
 ETCT European Textile Care Technology  
 Fuel Cells  
 HealthTech  
 Hybrid Lightweight Technologies  
 Intralogistics-2X  
 Large Engines - CIMAC Germany  
 Lasers and Laser Systems for Material Processing  
 Machines in Construction – MiC 4.0  
 Marine Equipment and Systems  
 Organic and Printed Electronics Association (OE-A)  
 Power-to-X for Applications  
 Sanitary Technology and Design  
 Wind Industry  
 Wireless Communications for Machines

### Forums

Building Technology  
 Glass Technology  
 Manufacturing-X  
 Mobile Machines  
 Packaging Materials/Means  
 Process Measurement  
 Process Technology  
 Quantum Technologies and Photonics  
 Teleservice  
 #XMOTIVE

### Committees

Accreditation  
 Business Administration and Corporate Management  
 China  
 Climate & Energy  
 Macroeconomic Issues  
 Communications  
 Compliance Management  
 Controlling & Accounting  
 Contract Law  
 Corporate Foresight  
 Corporate Responsibility  
 Control Technology  
 Cybersecurity  
 Customer Service



Customs  
 Digital Product Passport  
 DigitaLegis  
 Education  
 Embargo  
 Engineering & Design  
 Environmental Policy  
 Export Financing  
 Foreign Trade  
 Heavy Transport  
 Industrial Property Rights  
 Industrial Security  
 Information Security  
 International Employee Postings  
 Interoperability  
 IT Committee  
 IT Expert group  
 Labour Law  
 Legal  
 Machinery Directive  
 Macroeconomic Issues  
 Marketing  
 NIS2  
 Occupational Safety  
 Personnel  
 Platform Economy  
 Product Management  
 Production  
 Public Procurement  
 Purchasing and Materials Management  
 Quality & Management  
 Research and Innovation  
 Risk Management, Compliance & Auditing  
 Standardisation  
 Substance Policy  
 Taxes  
 Tax Compliance  
 Taxes for Large-scale Plant Engineering  
 Technology Policy  
 Transfer Pricing  
 Wage Tax  
 Value Added Tax  
 USA

#### Advisory Boards and Expert Groups

Agile Software Development  
 Artificial Intelligence  
 Corporate Foresight  
 Informatics  
 Interoperability  
 IT  
 PCF Calculation  
 Platform Economy  
 Security Solutions for Industry  
 Technology Policy

## Service Organisations

### Deutsche Forschungsgesellschaft für Automatisierung und Mikroelektronik e.V. (DFAM)

Managing Director: **Max Decker**

### DIN-Normenausschuss Maschinenbau (NAM)

### DIN-Normenausschuss Werkzeugmaschinen (NWM)

### Fachbetriebsgemeinschaft Maschinenbau e. V. (FGMA)

### Förderverein Mobile Arbeitsmaschinen e.V. (MOBIMA)

Managing Director: **Hartmut Rauen, Christian Kunze**

### Forschungsfonds Fluidtechnik

Managing Director: **Hartmut Rauen, Dr Christian Geis**

### Forschungsfonds Pumpen (FFP)

Managing Director: **Christoph Singrün**

### Forschungsfonds Vakuumtechnik

Managing Director: **Christoph Singrün**

### Forschungsgemeinschaft Industrieofenbau e.V. (FOGI)

Managing Director: : **Joachim Kahn, Dr Timo Würz**

### Forschungsgemeinschaft Intralogistik/Fördertechnik und Logistiksysteme (IFL)

Managing Director: **Sascha Schmel**

### Forschungskuratorium Maschinenbau e. V. (FKM)

Managing Director: **Dr Eric Maiser** (since July 2024), **Dietmar Goericke** (until June 2024)

### Forschungsplattform Holzbearbeitungstechnologie e.V. (FPH)

Managing Director: **Dr Bernhard Dirr**

### Forschungsrat Kältetechnik e.V. (FKT)

Managing Director: **Robert Hild**

### Forschungsvereinigung Antriebstechnik e.V. (FVA)

Managing Director: **Hartmut Rauen**

### Forschungsvereinigung Bau- und Baustoffmaschinen e.V. (FVB)

Managing Director: **Dr Darius Soßdorf**

### Forschungsvereinigung für Luft- und Trocknungstechnik e.V. (FLT)

Managing Director: **Robert Hild**

### FVV e.V. – Science for a moving society

Managing Director: **Martin Nietsche** (since July 2024), **Dietmar Goericke** (until June 2024)

### PrintPromotion GmbH

Managing Director: **Holger Breiderhoff, Thomas Schiemann**

## International Committees and Working Groups

### Agricultural Technology

CEMA aisbl – European Agricultural Machinery, Management: CEMA, Belgium

### Automation + Management for Home + Building

European Building Automation and Controls Association (eu.bac), Management: VDMA

### Building Material Machines

European Ceramic Technology Suppliers (ECTS), Management: VDMA

### Ceramic Machines and Systems

European Ceramic Technology Suppliers (ECTS), Management: VDMA

### Compressors, Compressed Air and Vacuum Technology

European Association of Manufacturers of Compressors, Vacuum Pumps, Pneumatic Tools and Air & Condensate Treatment Equipment (PNEUROP), Management: Orgalim, Belgium

### Construction Machinery and Processing Technology and Mining

Committee for European Construction Equipment (CECE), Management: CECE, Belgium

### Conveyor Technology

European Materials Handling Federation (FEM), Management: Orgalim, Belgium

### Cutting Tools, Clamping Technology

European Cutting Tools Association (ECTA), Management: VDMA

### Drive Technology

Comité Européen des Associations de Constructeurs d'Engrenages et d'Éléments de Transmission (EUROTRANS), Management: VDMA

### Drives and Systems (Engines, Turbines, Alternative Drives)

CIMAC e.V., Management: VDMA

### Fire Protection Technology

European Committee of Manufacturers of Vehicles, Equipment and Installations for Fire Protection (EUROFEU), Management: bvfa

### Fluid Power

Comité Européen des Transmissions Oléohydrauliques et Pneumatiques (CETOP), Management: VDMA

### Foundry Machines

The European Foundry Equipment Suppliers Association (CEMAFON), Management: VDMA

### General Air Technology, Air Conditioning and Ventilation Technology/Refrigeration Technology

European Committee of Heating, Ventilation, Air Conditioning and Refrigeration Manufacturers (EUROVENT), President: Raul Corredera Haener

### Generating Sets

European Association for Power Generating Sets (Europgen), Management: VDMA

### Large-scale Plant Engineering

European Committee of Large Plant Manufacturers (EUROPLANT), Management: VDMA

### Lifts

European Lift Association (ELA), Management: ELA, Belgium

### Liquid Pumps

European Association of Pump Manufacturers (EUROPUMP), Management: Orgalim, Belgium

### Machine Tools

European Association of the Machine Tool Industries (CECIMO), Management: CECIMO, Belgium

### Mechanical Engineering, Electrical Engineering, Electronics and Metal Technology

Orgalim, Brussels

### Motor Systems for Power Generation

European Engine Power Plants Association (EUGINE), Management: VDMA

### Packaging Machines

Confederation of Packaging Machinery Association (C.O.P.A.M.A), General Secretariat: FME/GMV, Netherlands  
European Packaging Machinery Association (EUROPAMA), General Secretariat: VDMA

### Plastic and Rubber Machines

European Plastics and Rubber Machinery Association (EUROMAP), Management: VDMA

### Printing and Paper Processing Machines

International Federation of Printing Industry (Global Print), Secretariat: APTECH, USA

### Process Engineering

European Committee for Process Equipment and Plant Manufacturers (EUCHEMAP), General Secretariat: VDMA

### Pumps + Systems

European Association of Pump Manufacturers (EUROPUMP), Management: Orgalim, Belgium

**Robotics**

International Federation of Robotics (IFR),  
Management: VDMA

**Rolling Bearings**

Federation of European Bearing Manufacturers' Associations (FEBMA), Management: VDMA

**Scales**

Comité Européen des Constructeurs d'Instruments de Pesage (CECIP), Management: VDMA

**Textile Machinery**

European Committee of Textile Machinery Manufacturers (CEMATEx), Management: ACIMIT, Italy (since May 2024),  
Swissmem, Switzerland (until April 2024)

**Thermoprocess Technology**

The European Committee of Industrial Furnace, Heating and Metallurgical Equipment Associations (CECOF),  
Management: VDMA

**Toolmaking**

International Special Tooling and Machining Association (ISTMA),  
Management: CEFAMOL, Portugal

**Turbines**

European Association of Gas and Steam Turbine Manufacturers (EUTurbines), Management: VDMA

**Vacuum Technology**

European Vacuum Technology Association (EVTA),  
Management: VDMA

**Woodworking Machinery**

European Federation of Woodworking Machinery Manufacturers (EUMABOIS), Management: ACIMALL, Italy

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**Gerhard Borho,**

Festo SE & Co. KG, Esslingen (until January 2023)

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KUKA Aktiengesellschaft, Augsburg

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Siemens Gamesa Renewable Energy, ES-Madrid (until July 2024)

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ENGEL AUSTRIA GmbH, AT-Schwertberg

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Voith GmbH & Co. KGaA, Heidenheim

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**Carolin Kurtz,**

KURTZ Holding GmbH & Co. Beteiligungs KG, Kreuzwertheim

**Prof Dr Peter Laier,**

ZF Friedrichshafen AG, Friedrichshafen (since January 2023)

**Dr Thomas Lindner,**

Groz-Beckert KG, Albstadt

**Jan-Hendrik Mohr,**

CLAAS KGaA mbH, Harsewinkel (since June 2023)

**Rolf Najork,**

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**Achim Peltz,**

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**Wilhelm Rehm,**

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**Christine Rupp,**

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**Dipl.-Wirtsch.-Ing. Henrik Schunk,**

SCHUNK SE &amp; Co KG, Lauffen am Neckar

**Dr Stefan Spindler,**

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**Dr Stephan Timmermann,**

KSB SE &amp; Co. KGaA, Frankenthal

**Carl Martin Welcker,**

Alfred H. Schütte GmbH &amp; Co KG, Cologne

**Dirk Wittkopp,**

IBM Deutschland Entwicklung GmbH, Böblingen (until December 2021)

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BAUER Maschinen GmbH, Schrobenhausen (since January 2023)

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Voith Hydro Holding GmbH &amp; Co. KG, Heidenheim (since October 2020)

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SSI Schäfer Automation GmbH, Giebelstadt (until October 2023)

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GEA Group AG, Düsseldorf (until October 2021)

**Thomas Böck,**

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**Gerhard Borho,**

Festo SE &amp; Co. KG, Esslingen (until January 2023)

**Dr Sönke Brodersen,**

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**Dr Erich Bröker,**

Jagenberg AG, Krefeld (until June 2023)

**Dr Cornelia Brucklacher,**

Leitz GmbH &amp; Co KG, Oberkochen

**Regina Brückner,**

BRÜCKNER Trockentechnik GmbH &amp; Co KG, Leonberg (until March 2022)

**Dr Lars Brzoska,**

Jungheinrich AG, Hamburg

**Jochen Burg,**

SMS group GmbH, Hilchenbach (since January 2024)

**Burkhard Dahmen,**

SMS group GmbH, Düsseldorf (until January 2024)

**Olaf Desch,**

Nidec DESCH Antriebstechnik GmbH &amp; Co. KG, Arnsberg (since October 2023)

**Dr Joachim Döhner,**

KUKA Systems GmbH, Augsburg (until July 2024)

**Jan Drömer,**

ek robotics GmbH, Hamburg (since February 2024)

**Wilfried Eberhardt,**

KUKA Aktiengesellschaft, Augsburg

**Dr Jochen Eickholt,**

Siemens Gamesa Renewable Energy, ES-Madrid (until July 2024)

**Michael Eisler,**

WEILER Werkzeugmaschinen GmbH, Emskirchen

**Andreas Endters,**

J.M. Voith SE &amp; Co KG / VPH, Heidenheim

**Dr Stefan Engleder,**

ENGEL AUSTRIA GmbH, A-Schwertberg

**Stefan Euchner,**

EUCHNER GmbH + Co KG, Leinfelden

**Prof Dr Peter Fath,**

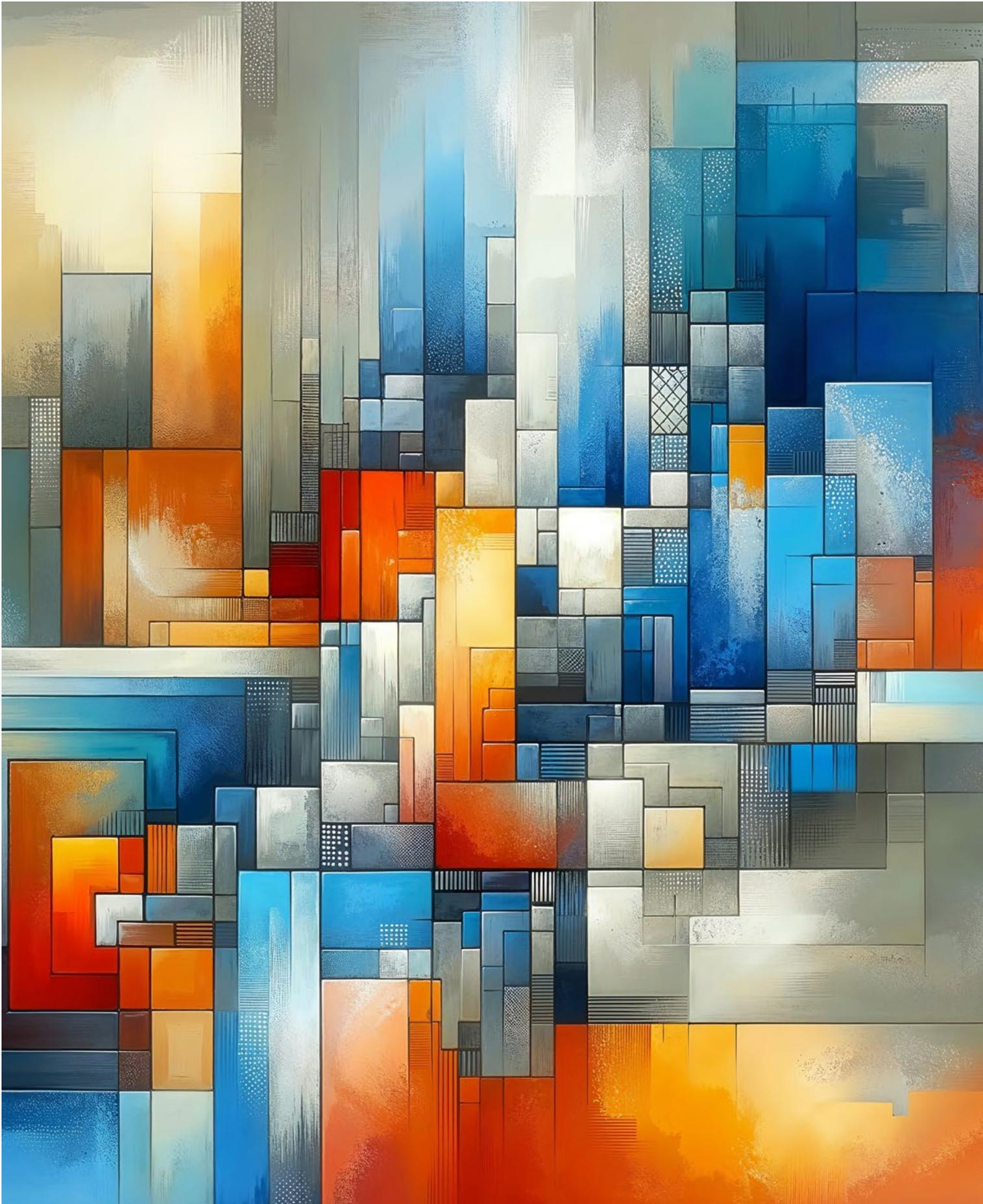
RCT Solutions GmbH, Constance

**Dr Reinhold Festge,**

HAVER &amp; BOECKER OHG Wire weaving mill and machine factory, Oelde

**Bodo Finger,**

Maschinenfabrik Mönninghoff GmbH &amp; Co. KG, Bochum (until July 2024)



**Charlotte Finger,**

Maschinenfabrik Mönninghoff GmbH & Co KG, Bochum

**Michael Finkler,**

proALPHA GmbH, Weilerbach (since October 2020)

**Jörg Freitag,**

SIEMENS AG, Nuremberg

**Dr York Fusch,**

Körting Hannover GmbH, Hannover

**Dr Klaus Geißdörfer,**

ebm-papst Mulfingen GmbH & Co. KG, Mulfingen (since January 2023)

**Alfred Geissler,**

DMG MORI AG, Bielefeld (since January 2024)

**Dr Steffen Haack,**

Bosch Rexroth AG, Lohr (since November 2021)

**Dr Toralf Haag,**

Voith GmbH & Co. KGaA, Heidenheim

**Dipl.-Kfm., MBA Philipp Hahn-Woernle,**

viastore SYSTEMS GmbH, Stuttgart (until January 2024)

**Claudia Haimer,**

Haimer GmbH, Igenhausen

**Stefan Hantke,**

SCHNEEBERGER Holding AG, CH-Roggwil (since March 2023)

**Christoph Hauck,**

toolcraft AG, Georgensgmünd

**Karl Haeusgen,**

HAWE Hydraulik SE, Aschheim/Munich

**Klaus-Hasso Heller,**

Aerzener Maschinenfabrik GmbH, Aerzen (until June 2023)

**Dipl.-Ing. (FH) Klaus Helmrich,**

SIEMENS AG, Nuremberg (until March 2021)

**Dr Frank Hiller,**

DEUTZ AG, Cologne (until February 2022)

**Florian Hofbauer,**

RENK GmbH, Augsburg (until May 2021)

**Dr Bertram Hoffmann,**

WITTENSTEIN SE, Igersheim

**Dr Jürgen Holdhof,**

EDUR-Pumpenfabrik Eduard Redlien GmbH & Co. KG, Kiel (until January 2023)

**Dr Janpeter Horn,**

August HERZOG Maschinenfabrik GmbH & Co KG, Oldenburg (since March 2022)

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**Christoph Klenk,**

KRONES AG, Neutraubling

**Jan Klingelberg,**

Klingelberg AG, CH-Zurich

**Petra Klingenstein,**

Hitachi Energy Germany AG, Mannheim (until June 2023)

**Günther Klingler,**

Chr. Mayr GmbH + Co KG, Mauerstetten (until November 2021)

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HAHN Automation Group GmbH, Rheinböllen (since September 2021)

**Dr Marcus Korthäuer,**

ESPERA-WERKE GMBH, Duisburg (since July 2023)

**Nicolaus Krämer,**

HERMETIC-Pumpen GmbH, Gundelfingen (since April 2023)

**Dr Peter Kreisfeld,**

iwis antriebssysteme GmbH & Co. KG, Munich (until November 2020)

**Mathis Kuchejda,**

SCHMIDT + HAENSCH GmbH & Co, Berlin

**Carolin Kurtz,**

KURTZ Holding GmbH & Co. Beteiligungs KG, Kreuzwertheim

**Prof Dr Peter Laier,**

ZF Friedrichshafen AG, Friedrichshafen (since January 2023)

**Dr Uwe Lauber,**

MAN Energy Solutions SE, Augsburg

**Dr Wolfgang Leitner,**

ANDRITZ AG, AT-Graz (until June 2022)

**Anthony van der Ley,**

LEMKEN GmbH & Co KG, Alpen (since October 2020)

**Dr Thomas Lindner,**

Groz-Beckert KG, Albstadt

**Dipl.-Chem. Michael Ludden,**

Sutco RecyclingTechnik GmbH, Bergisch Gladbach

**Edgar Mähringer-Kunz,**

IMSTec GmbH, Klein-Winternheim

**Wolf D. Meier-Scheuven,**

BOGE KOMPRESSOREN Otto Boge GmbH & Co KG, Bielefeld

**Alexander Melkus,**

SIGMATEK GmbH & Co KG, A-Lamprechtshausen (since October 2020)

**Dieter Menne,**

Mettler-Toledo GmbH, Giessen (until June 2023)

**Dr Frank Mitzschke,**

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**Jan-Hendrik Mohr,**

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**Dr Jan Mrosik,**

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**Martin Mühlbacher,**

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**Stefan Munsch,**

MUNSCH Chemie-Pumpen GmbH, Ransbach-Baumbach

**Rolf Najork,**

Robert Bosch GmbH, Stuttgart (until December 2022)

**Moritz Netzsch,**

Erich NETZSCH B.V. & Co. Holding KG, Selb

**Kai Neubauer,**

KASPAR SCHULZ Brauereimaschinenfabrik & Apparatebauanstalt GmbH

**Bernd Neugart,**

Neugart GmbH, Kippenheim (since September 2021)

**Wilfried Neuhaus-Galladé,**

J. D. NEUHAUS GmbH & Co KG, Witten

**Dipl.-Ing. (FH) Frank Notz,**

Festo SE & Co. KG, Esslingen (since January 2023)

**Jürgen Nowicki**

Linde GmbH Linde Engineering, Pullach

**Werner Ottilinger,**

SAUTER Germany Sauter-Cumulus GmbH, Freiburg

**Pekka Paasivaara,**

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**Dipl.-Ing. Andreas Panz,**

Körber Technologies GmbH, Hamburg (since March 2023)

**Franz-Josef Paus,**

Hermann Paus Maschinenfabrik GmbH, Emsbüren (until September 2024)

**Achim Peltz,**

Siemens AG, Erlangen (since July 2021)

**Markwart von Pentz,**

John Deere GmbH & Co KG, Mannheim

**Alexander Peters,**

NEUMANN & ESSER Verwaltungs- u. Beteiligungsgesellschaft mbH, Übach-Palenberg

**Thomas Pilz,**

Pilz GmbH & Co KG, Ostfildern

**Dr Heinz-Jürgen Prokop,**

TRUMPF Werkzeugmaschinen SE + Co KG, Ditzingen (until December 2021)

**Dipl.-Ing. Cornelia Püschel,**

PÜSCHEL Automation GmbH & Co KG, Lüdenscheid

**Wilhelm Rehm,**

ZF Friedrichshafen AG, Friedrichshafen (until December 2022)

**Ulrich Reifenhäuser,**

REIFENHÄUSER GmbH & Co. KG Maschinenfabrik, Troisdorf

**Albert Reiss,**

ARKU Maschinenbau GmbH, Baden-Baden

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**Christine Rupp,**

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accelcon industrial engineering GmbH, Heusweiler

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ANDRITZ AG, AT-Graz (since June 2022)

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ABP Induction Systems GmbH, Dortmund (since February 2024)

**Dr Harald Schrimpf,**

PSI Software SE, Berlin (until June 2023)

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HAWE Hydraulik SE, Aschheim/Munich (until December 2023)

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**Dr Stefan Spindler,**

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**Martin Zaindl,**

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**Stefan Zecha,**

Zecha Hartmetall-Werkzeugfabrikation GmbH, Königsbach-Stein

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Deputy Executive Director:

**Hartmut Rauen**

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**Axel Brugger,**

Siemens AG, Berlin (from May 2021 to November 2023)

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Siemens AG, Munich (since November 2023)

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**Karl Friedrich Schmidt,**

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GETT Gerätetechnik GmbH, Treuen

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KREISEL GmbH & Co KG Umwelttechnik, Krauschwitz

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**Klaus-Hasso Heller**,  
Aerzener Maschinenfabrik GmbH, Aerzen (until November 2022)

**Consul Petra Baader**,  
Nordischer Maschinenbau Rud.Baader GmbH+Co. KG, Lübeck

**Norbert Basler**,  
Basler AG, Ahrensburg

**Dr Victoria Behrmann**,  
Amandus Kahl GmbH & Co KG, Reinbek

**Christian Decker**,  
DESMASchuhmaschinen GmbH, Achim

**Klaus Deleroi**,  
REINTJES GmbH, Hamelin

**Stephan Gais**,  
Mahr GmbH, Göttingen (until November 2022)

**Manuel Hüsken**,  
Mahr GmbH, Göttingen

**Timm Grotheer**,  
NABERTHERM GmbH, Lilienthal

**Dr Jürgen Holdhof**,  
EDUR-Pumpenfabrik Eduard Redlien GmbH & Co. KG, Kiel  
(until November 2022)

**Frederike Holdhof**,  
EDUR-Pumpenfabrik Eduard Redlien GmbH & Co. KG, Kiel

**Sonja Neubert**,  
Siemens AG, Hamburg

**Andreas Panz**,  
Körper Technologies GmbH, Hamburg

**Matthias Pilz**,  
Oerlikon Neumag, branch of Oerlikon Textile GmbH & Co. KG,  
Neumünster

**Lars Reeder**,  
Hein & Oetting Feinwerktechnik GmbH, Ahrensburg

**Jürgen Röders**,  
Röders GmbH, Soltau

**Carolin von Rönne**,  
Getriebebau NORD GmbH & Co. KG, Bargteheide (co-opted March  
2024)

**Mathias Rusch**,  
SKF Marine GmbH, Hamburg (until November 2022)

**Henning Saacke**,  
SAACKE GmbH, Bremen

**Dr Sandra Szech**,  
Odego GmbH, Hamburg

**Markus Waterkamp**,  
KROENERT GmbH & Co. KG, Hamburg (co-opted March 2024)

**Axel Weidner**,  
Mankenberg GmbH, Lübeck (until November 2022)

Managing Director: **Dr Jörg Mutschler**

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Chairman: **Dr Timo Berger**,  
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**Dr Karl-Peter Becker**,  
Arnz FLOTT GmbH Werkzeugmaschinen, Remscheid

**Charlotte Finger**,  
Maschinenfabrik Mönninghoff GmbH & Co KG, Bochum

**Michael Hess**,  
Carl KRAFFT & Söhne GmbH & Co. KG, Düren

**Dr Ulf Leinhäuser**,  
Claas Industrietechnik GmbH, Paderborn

**Nicola Lemken**,  
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**Wolf D. Meier-Scheuven**,  
BOGE KOMPRESSOREN Otto Boge GmbH & Co KG, Bielefeld

**Dr Robert Rank**,  
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**Benjamin Reiners**,  
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**Michael Rennerich**,  
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Voss Fluid GmbH, Wipperfürth

**Ludger Wissing**,  
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**Dr Stephan Witt**,  
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Managing Director: **Hans-Jürgen Alt**

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**Dr Tobias Brune**,

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**Rudolf Derntl**,

Hermle Maschinenbau GmbH (HMG), Ottobrunn

**Guido Frohnhaus**,

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**Christoph Hauck**,

toolcraft AG, Georgensgmünd

**Dr Karsten Heuser**,

Siemens AG, Erlangen

**Alexander Jakschik**,

ULT AG, Löbau

**Renè Kreissl**,

TRUMPF Laser- und Systemtechnik AG, Ditzingen (until June 2023)

**Carsten Merklein**,

Schaeffler Technologies AG & Co KG, Herzogenaurach

**Dr Astrid Rota**,

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Managing Director: **Dr Markus Heering**

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**Dirk Brannolte**,

ZF Friedrichshafen AG, Passau

**Dott. Aldo Carozza**,

SDF S.p.A., IT-Treviglio

**Vincenzo Cetani**,

SAME DEUTZ-FAHR Deutschland GmbH, Lauingen

**Mathias Dieter**,

HYDAC TECHNOLOGY GmbH, Sulzbach

**Christian Dreyer**,

AMAZONEN-WERKE H. Dreyer SE & Co KG, Hasbergen

**Josef Fliegl jun**,

Fliegl Agrartechnik GmbH, Mühldorf am Inn

**Henrik Gilstring**,

Väderstad AB, SE-Väderstad

**Arild Gjerde**,

Kverneland AS Kverneland Group, NO-Klepp Stasjon

**Christoph Grimme**,

Grimme Landmaschinenfabrik GmbH & Co KG, Damme

**Christoph Gröblichhoff**,

AGCO GmbH, Marktobersdorf

**Michael Horsch**,

HORSCH Maschinen GmbH, Schwandorf

**Steven van Kooten Niekerk**,

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**Prof Dr Martin Kremmer**,

John Deere GmbH & Co. KG, European Technology Innovation Centre, Kaiserslautern

**Thierry Krier**,

Kuhn SAS, FR-Saverne

**Bernard Krone**,

Bernard Krone Holding SE & Co KG, Spelle

**Jan-Hendrik Mohr**,

CLAAS KGaA mbH, Harsewinkel

**Heinz Pöttinger**,

Pöttinger Landtechnik GmbH, AT-Grieskirchen

**Ulrich Rassenhövel**,

GEA Farm Technologies GmbH, Bönen

**Dr Benjamin Schutte**,

Claas Global Sales GmbH

**Walter Wagner**,

AGCO GmbH, Marktobersdorf

**Cornelia Walde**,

John Deere Walldorf International GmbH, Walldorf

**Sebastian M. Zunhammer**,

Zunhammer GmbH, Traunreut

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**Dr Bernd Scherer** (until June 2022)

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**Dr Stephan Arnold**,

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**Dr Henrik Badt**,

Kalthoff Luftfilter und Filtermedien GmbH, Selm

**Dr Henning Bähren**,

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**Michael Bauer**,

Fläktgroup Germany, Herne (until September 2021)

**Michael Freiherr**,

Güntner GmbH & Co. KG, Fürstenfeldbruck (since May 2024)

**Wolf Hartmann**,

LTG Aktiengesellschaft, Stuttgart (until November 2022)

**Dr Urs Herding**,

Herding GmbH Filtertechnik, Amberg

**Udo Laeis**,

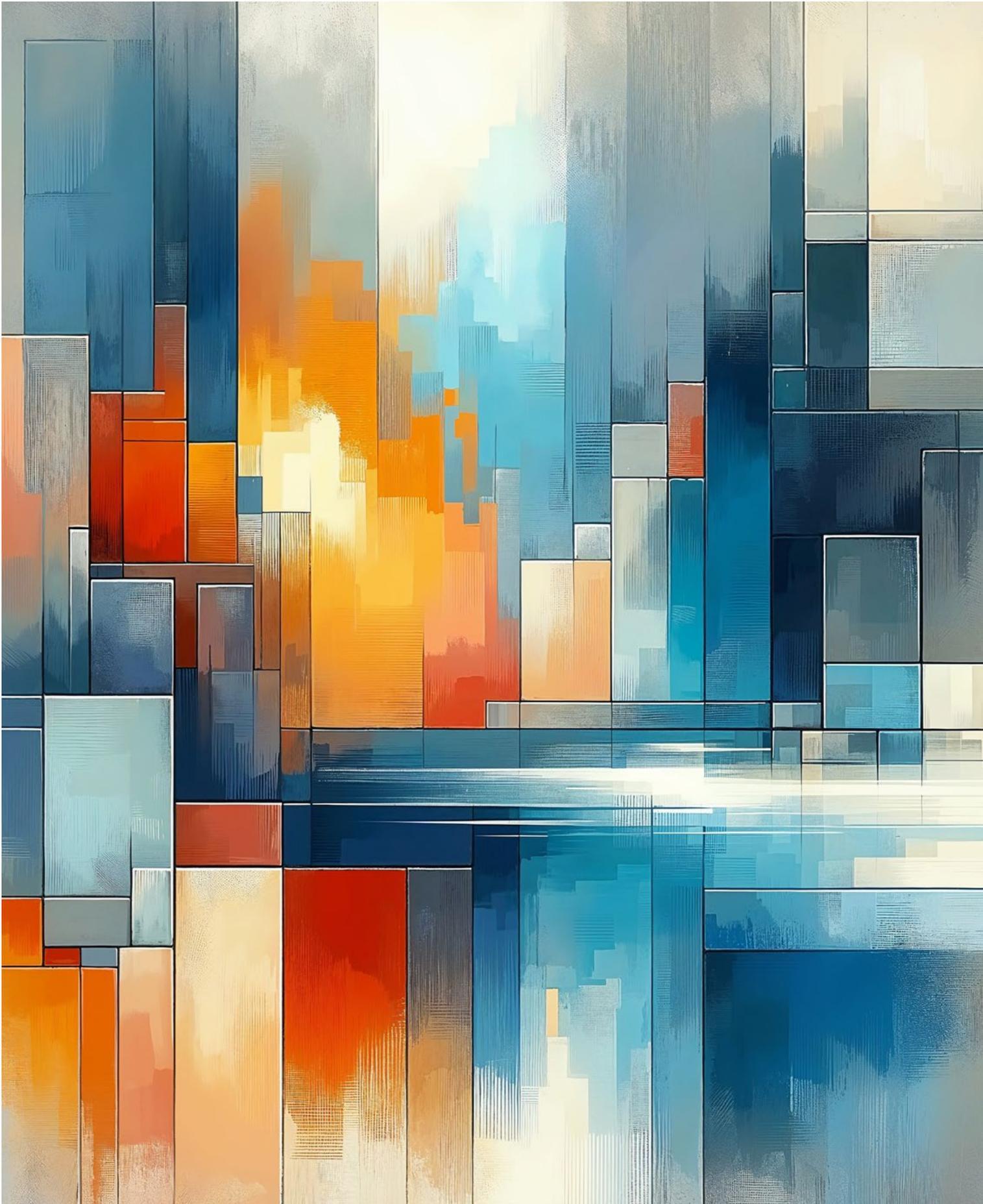
Viessmann Refrigeration Solutions GmbH (since November 2022)

**Dr Nabil Abou Lebdi**,

Ventilatorenfabrik Oelde GmbH, Oelde

**Thomas Rippert**,

Rippert Anlagentechnik GmbH & Co. KG, Herzebrock-Clarholz



**Prof Dr Tomas Smetana,**

ebm-papst Mulfingen GmbH & Co KG, Mulfingen (since May 2024)

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**Andreas von Thun,**

BerlinerLuft. Technik GmbH, Berlin

**Ralf Wagner,**

LTG Aktiengesellschaft, Stuttgart (since November 2022)

**Christian Weiser,**

A-HEAT Allied Heat Exchange Technology AG, AT-Vienna, subsidiary: Güntner GmbH & Co. KG, Fürstenfeldbruck (until May 2024)

**Monika Witt,**

TH. WITT Kältemaschinenfabrik GmbH, Aachen

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**Dr Alexey Levin,**

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**Dr Heinrich Ostendarp,**

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**Johann Sailer,**

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**Hans-Jörg Vollert,**

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**Matthias Weber,**

WEBER Maschinentechnik GmbH, Bad Laasphe

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**Egbert Wenninger,**

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**Klaus Deleroi,**

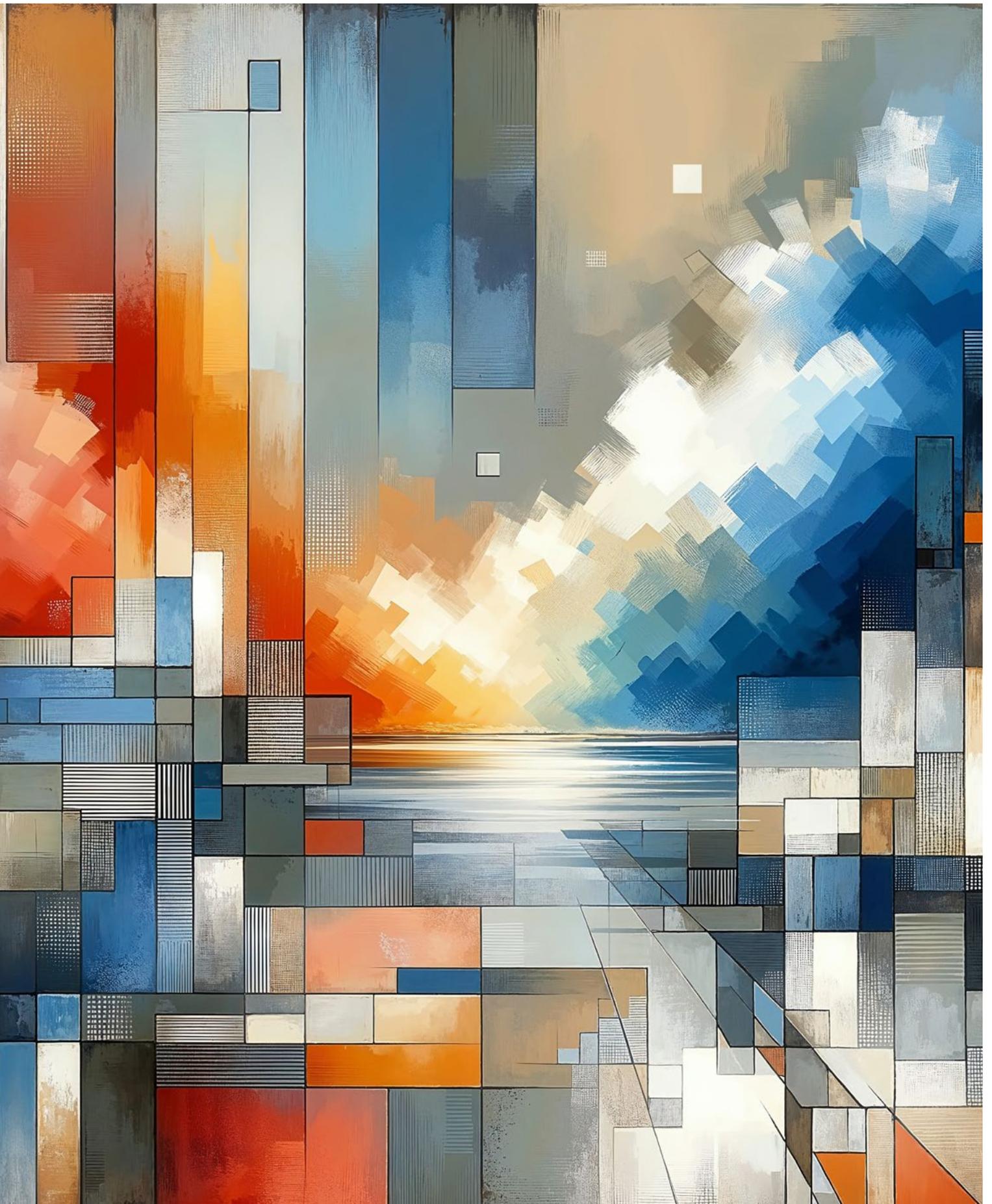
REINTJES GmbH, Hamelin

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**Dr rer. nat. Stephan Kohlsmann,**

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**Ken Dufford,**

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VETTER Krantechnik GmbH, Haiger

**Winfried Schmuck,**

BITO-Lagertechnik Bittmann GmbH, Meisenheim

**Franz Schulte,**

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**Torsten Gerlach,**

FAM Minerals & Mining GmbH, Magdeburg

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Herrenknecht AG, Schwanau

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Hitachi Energy Germany AG, Mannheim

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Andritz Hydro GmbH, Ravensburg

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**Klaus Rogge**,  
GE Wind Energy GmbH, Salzbergen

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**Michael Stipa**,  
Rolls-Royce Solutions GmbH, Friedrichshafen

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**Wilhelm Rehm**,  
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**Johann Soder**,  
SEW-EURODRIVE GmbH & Co. KG, Bruchsal (until December 2023)

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**Bernhard Torliene**,  
Eickhoff Antriebstechnik GmbH, Bochum (until April 2024)

**Nicola Warning**,  
KTR Systems GmbH, Rheine

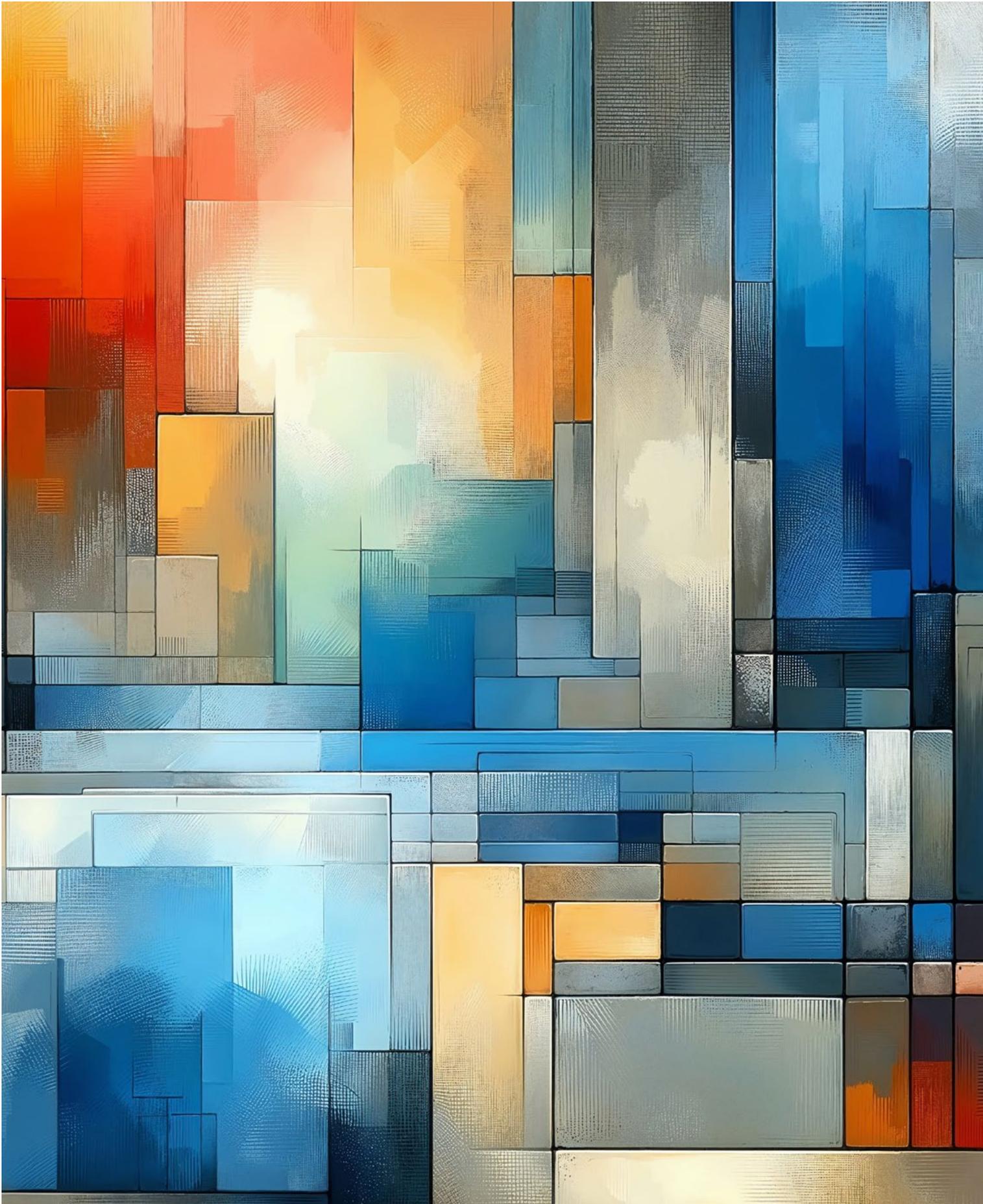
**Cornelius Weitzmann**,  
J.M. Voith SE & Co. KG / VTA Division Turbo, Heidenheim

**Christian Wendler**,  
Lenze SE, Aerzen

**Susanne Wiegand**,  
RENK GmbH, Augsburg

**Dr Anna-Katharina Wittenstein**,  
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# Image Creation with Artificial Intelligence

For the first time, we used generative artificial intelligence to create the illustrations in this annual report.

This step is also an experiment to evaluate the possibilities and limits of AI in professional editorial design. The new tools make it possible to develop customised visualisations that are both of high quality and unique.

We used Midjourney 5.2 and DALL-E (as an integral part of ChatGPT). We deliberately worked with very simple prompts in order to leave a lot of “responsibility” to the AI.

The very free implementations leave many possibilities for interpretation to the viewer. With this experimental approach, we hope to provide our readers with fresh, engaging and technologically advanced content.

What experiences did we make?

## **Quality control and consistency:**

AI-generated images can vary greatly in quality, especially if the descriptions entered are vague or ambiguous. It can be difficult to ensure a consistent image aesthetic that meets editorial standards. Especially when different AI systems are used. The abstract motifs we have chosen deliberately avoid exact reproduction of technical details.

## **Copyright and ethical concerns:**

The use of AI to create images raises questions regarding copyright. It can be unclear who owns the rights to an AI-generated image, especially if the underlying data or templates are protected by copyright. There are also ethical concerns regarding the authenticity and manipulation of images. We have therefore evaluated all images through several instances and processed them individually.

## **Excessive dependence on data:**

AI models are heavily dependent on the data used to train them. This can lead to bias in the image design if the database is not diverse enough or reflects historical prejudices. For example, an object of which only a few images exist on the internet is not relevant for the AI.



Picture result

Page 7  
Midjourney  
closeup of a diesel engine

Page  
AI used  
Prompt



Page 8  
Midjourney  
closeup of industrial laser cutting of metal, laser beam, sparks



Page 24/25  
Midjourney  
An mainly abstract painting, colors blue gray and orange, serene yet vibrant atmosphere, industrial automation



Page 10/11  
Midjourney  
closeup of a motor



Page 30  
DALL-E  
abstract picture in vibrant colors, serene yet vibrant style with a subtle city view, using shades of blue, orange, and grey.



Page 12  
Midjourney  
windpark in a rural region, 4 modern windmills, closeup



Page 35  
DALL-E  
abstract painting, featuring shades of blue, orange, and grey. Composition with of balance and harmony and unique arrangement of geometry



Page 14/15  
Midjourney  
Abstract interpretation of modern industry, colors mainly blue and grey



Page 38  
DALL-E  
abstract painting, shades of blue, orange, and grey, creating a serene yet vibrant atmosphere. The combination of colors aims to balance warmth, depth, and neutrality



Page 16  
Midjourney  
An abstract painting, colors blue gray and orange, serene yet vibrant atmosphere, the topic of the image is automotive



Page 43  
DALL-E  
abstract painting, shades of blue, orange, and grey in a serene vibrant atmosphere. The combination of colors and geometry creates a balanced composition.



Page 18/19  
Midjourney  
An mainly abstract painting, colors blue gray and orange, serene yet vibrant atmosphere,



Page 46  
DALL-E  
abstract painting, maintaining the balance of blue, orange, and grey a new arrangement of shapes and lines for a different sense of tranquility and dynamism.



Page 21  
Midjourney  
An mainly abstract painting, colors blue gray and orange, serene yet vibrant atmosphere, geometrical, mechanic



Page 51  
DALL-E  
abstract painting, maintaining the balance of blue, orange, and grey a new arrangement of shapes and lines for a different sense of tranquility and dynamism.



Page 23  
Midjourney  
An mainly abstract painting, colors blue gray and orange, serene yet vibrant atmosphere, geometrical, mechanic



Page 54  
DALL-E  
abstract painting, featuring shades of blue, orange, and grey, offering a new interpretation of balance and harmony with its unique arrangement of geometric shapes.

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