

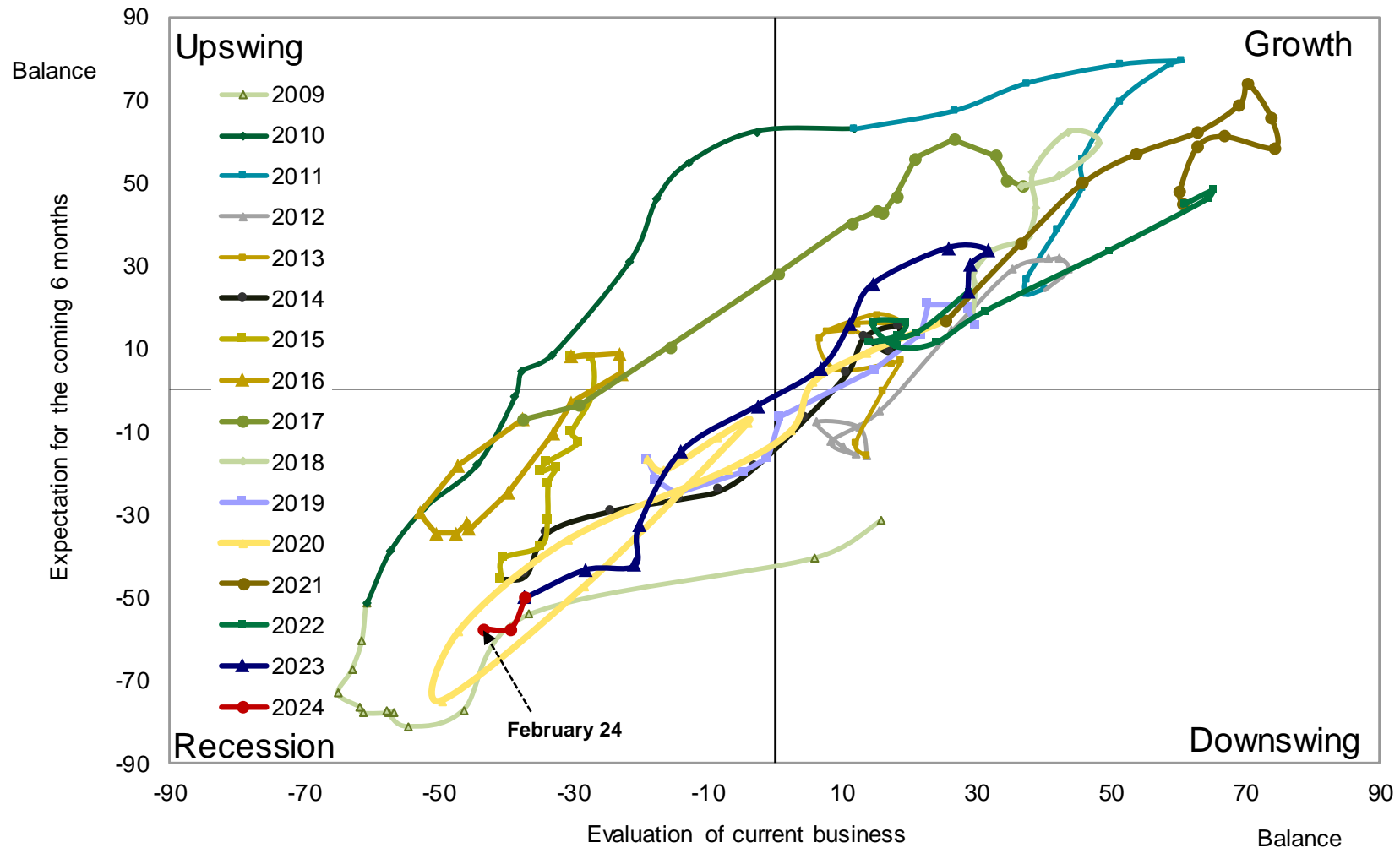
# Herausforderungen für Hersteller

8. Tag der LandBauTechnik

6. März 2024

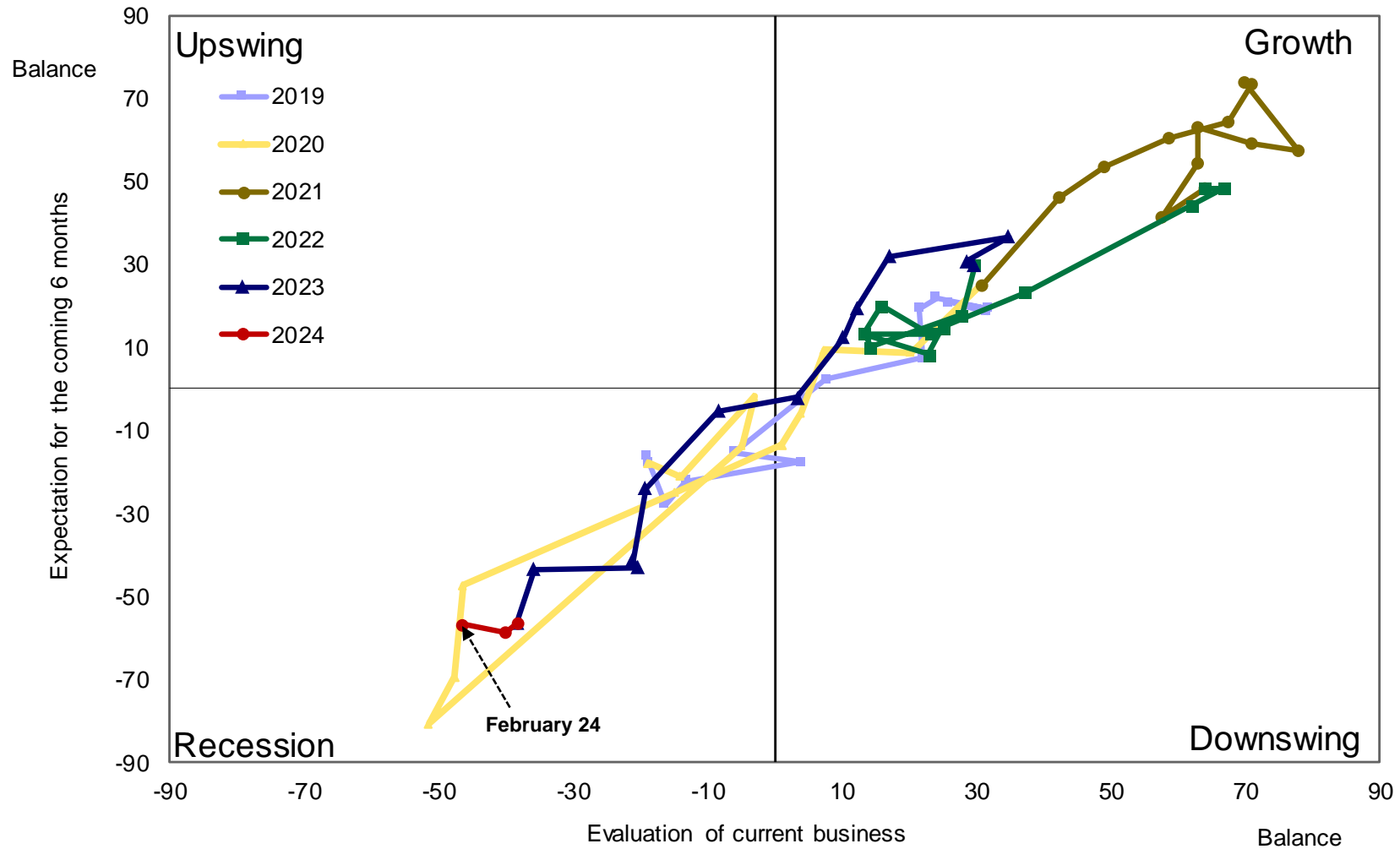
Dr. Tobias Ehrhard

# Business Climate



Source: CEMA Business Barometer, each value as an average of the last two months

# Business Climate



Source: CEMA Business Barometer

# Market



## Market Volume Development in real terms (converted into local currencies and deflated)

	2016	2017	2018	2019	2020	2021	2022e	2023f	2024f
	%-change	%-change	%-change	%-change	%-change	%-change	%-change	Trend	Trend
World	-1	4	5	-2	2	16	7	2	-8
EU 27 plus 1	-4	7	7	2	-2	16	6	↔	↘
NAFTA (ex)	-5	1	9	-4	7	15	10	↔	↓
China	-4	3	-10	-5	-4	9	11	↓	⇒
South America	4	7	10	-1	5	28	21	↘	↘
India	18	12	20	-7	12	7	2	⇒	↔
Russia	16	9	-4	-16	4	39	-43	↓	↘
Japan	-5	-2	3	6	-16	16	3	↔	↘
Turkey	-5	-2	-38	-20	37	35	-4	↑	↓

### Legend:

↑	> +10%
↔	+4/+10%
⇒	+/- 3%
↘	-4/-10%
↓	> -10%

### Main simplifications and assumptions:

- Past: Converted at annual average inflation and currency exchange rates
- Forecast: Real term development. Non-considered rest of the world with same real term development like the weighted average of the regions under consideration

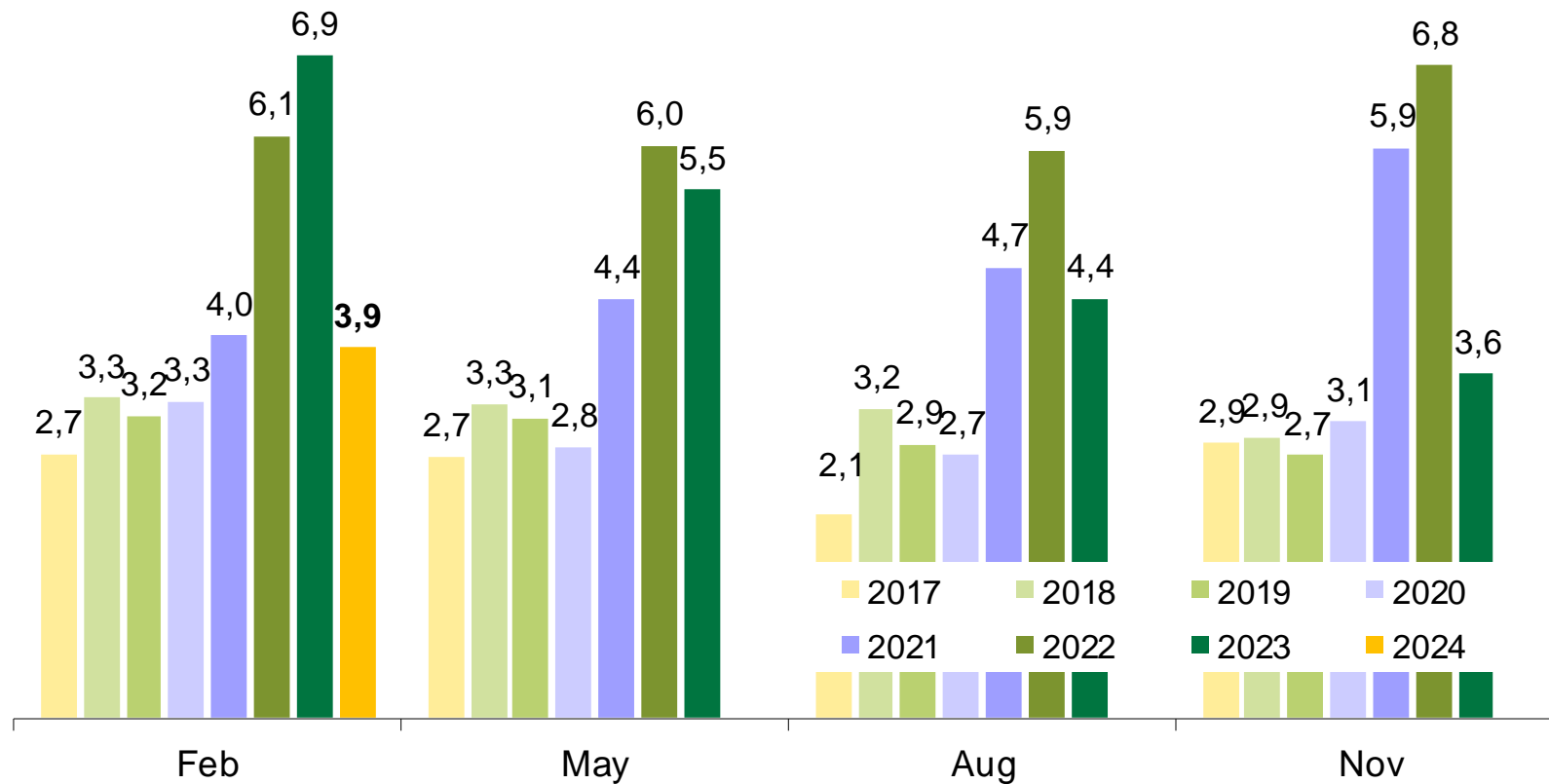
Source: VDMA (status February 2024)

# Business environment



## Manufacturers' volume of orders

Question: Our volume of orders corresponds currently to a production period of ... months.





## Global trend: Green and digital transformation

### The narrative – Create first mover advantages

- » EU creates framework to become trendsetter in green and digital technologies
- » EU companies will benefit as first movers in global markets
- » EU standards will become global standards



# Green and digital transformation – An ambitious regulatory framework

## A European Green Deal

Proposals for this term announced so far: 90



Proposals submitted to date



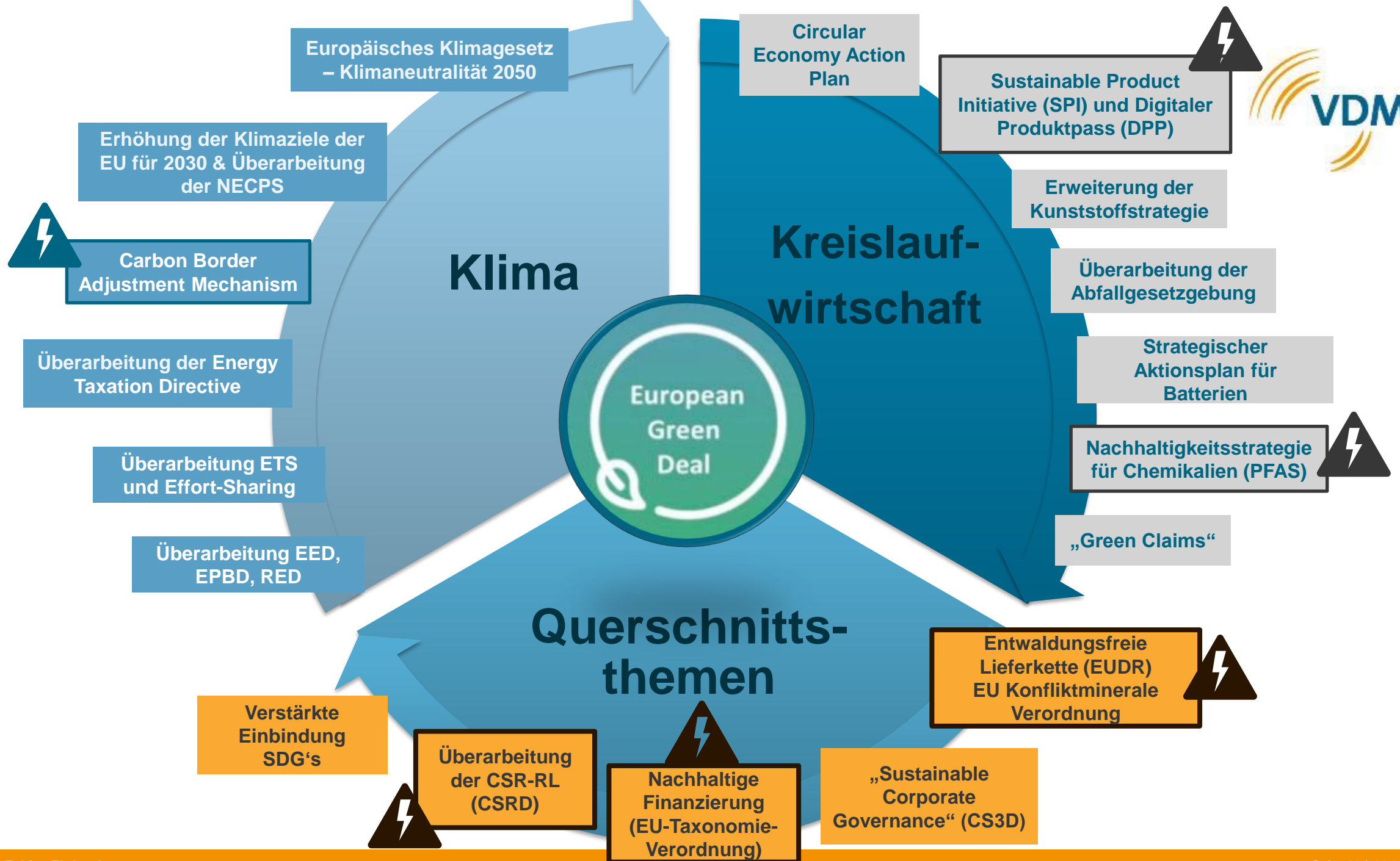
## A Europe fit for the digital age

Proposals for this term announced so far: 73



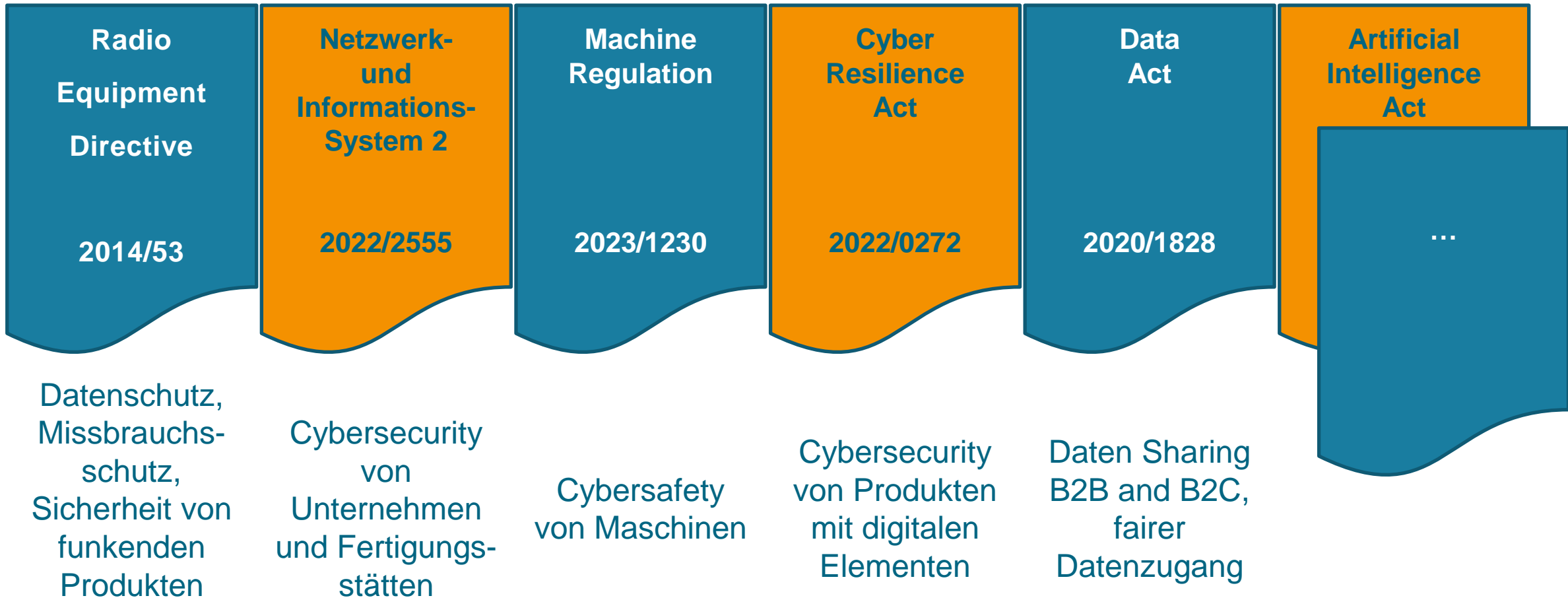
Proposals submitted to date





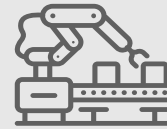


# Europäische Regulierungen – Überblick Cybersicherheit



# Cybersicherheit: um welche Bereiche geht es?

## NIS 2 Richtlinie (NIS2UmsuCG)

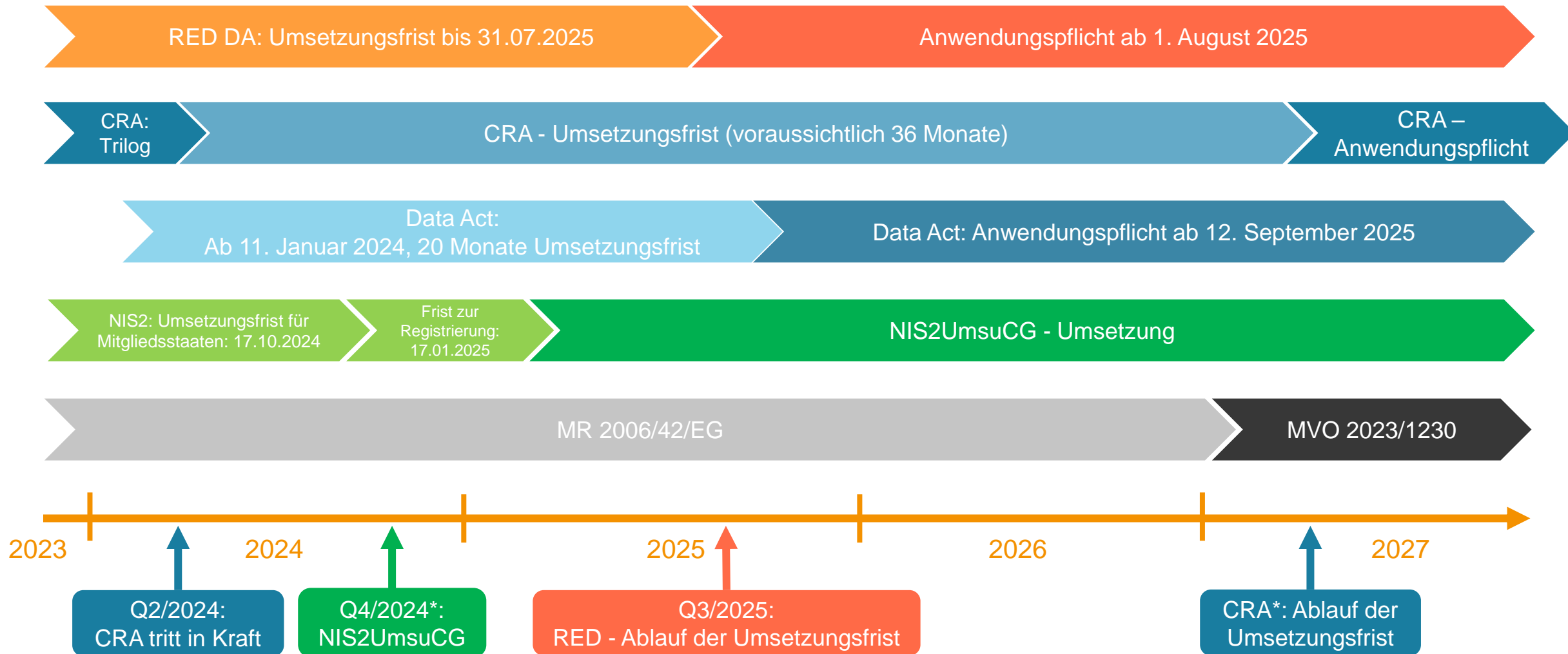


## Cyber Resilience Act RED Delegated Act Maschinenverordnung



Bereich	IT	OT	Produkt
Anwendungsbereich	Eigene IT-Infrastruktur	Fertigung / Shopfloor	Zu verkaufende Produkte
Verantwortung	IT-Abteilung	Betriebsleitung	Produktentwicklung
Systeme	Laptop, E-Mail, Webseite, IaaS	MES, SPS, Fernwartung	„Vernetztes Produkt“, IoT-Dienste, Maschinen-Cloud
Betriebsprozesse	Eigene Prozesse		Kundenprozesse
Regulierungsrolle	Verwender, Nutzer, Servicedienstleister		Hersteller

# Zeitplan NIS2-Umsetzung, RED DA, CRA, Data Act, MVO



A large, vertical image on the left side of the slide shows a single water droplet suspended in mid-air, just above a surface of water. The droplet is perfectly spherical and reflects light. Below it, a series of concentric ripples spread outwards across the water's surface. The entire scene is set against a background of varying shades of blue, from a deep teal at the bottom to a lighter, almost white blue at the top.

**Thank you**  
**Thank you**  
for your attention!