

# Current market situation Netherlands, Belgium and Luxembourg

Data as on March, 13<sup>th</sup> 2025 available

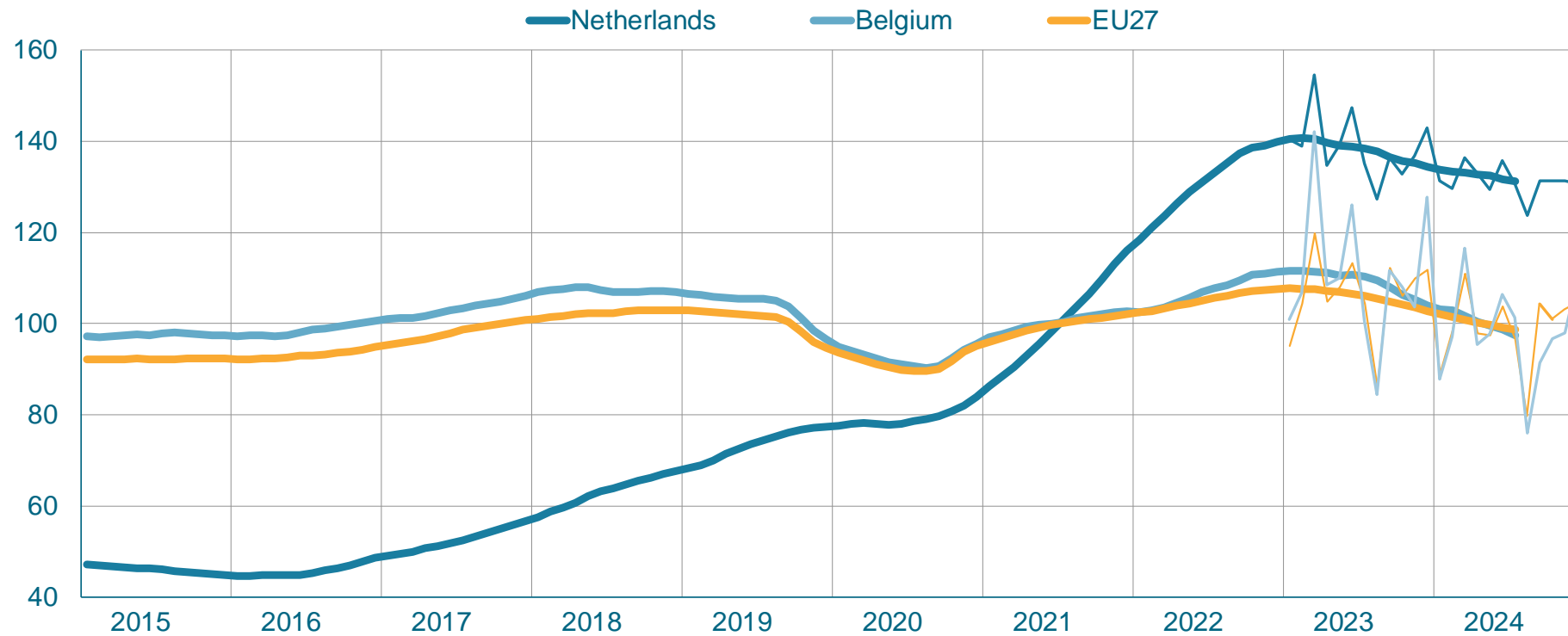
## Netherlands, Belgium, Luxembourg

### Mechanical and plant engineering

- Production
- Turnover forecasts
- Business climate, Capacity utilization rate and constraints

# Development of machinery production\*

Volume index, 2021 = 100 and 12-months moving average

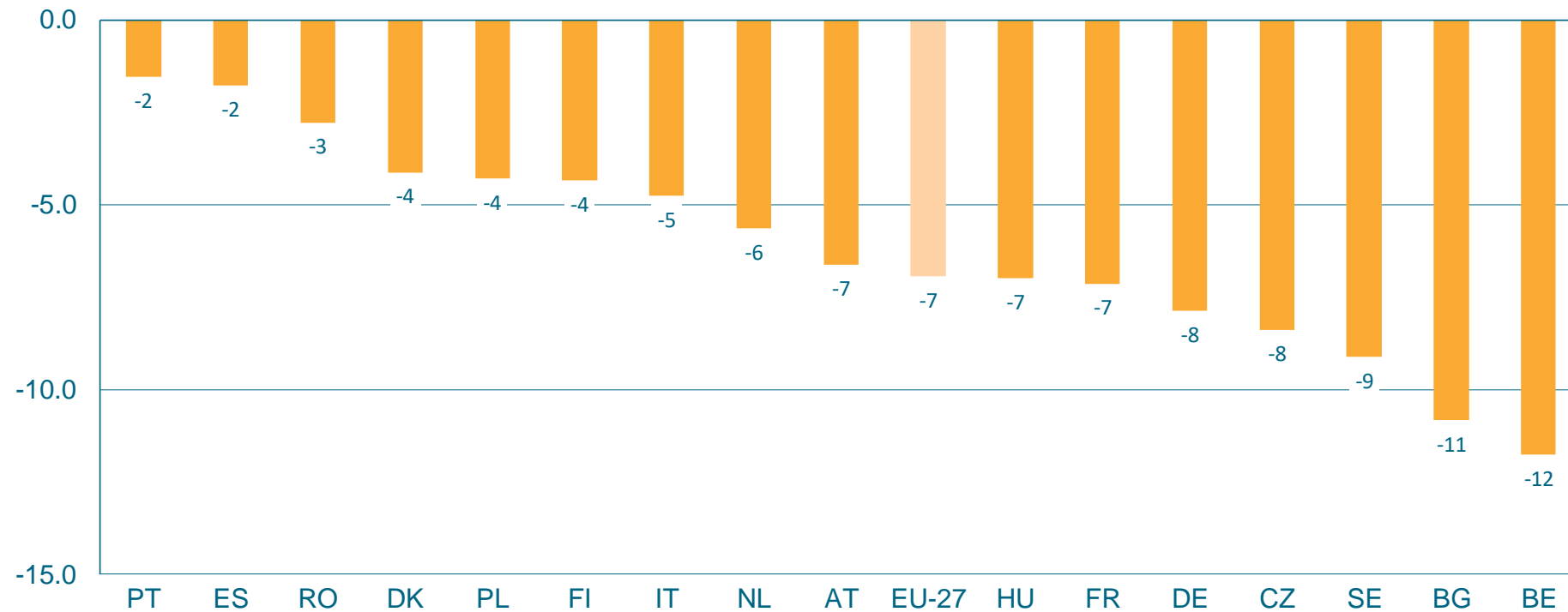


Source: Eurostat, Macrobond, VDMA

\*) NACE rev. 2 code 28.

# EU-27: Machinery production\*

January - December 2024/2023, %, real, calendar adjusted

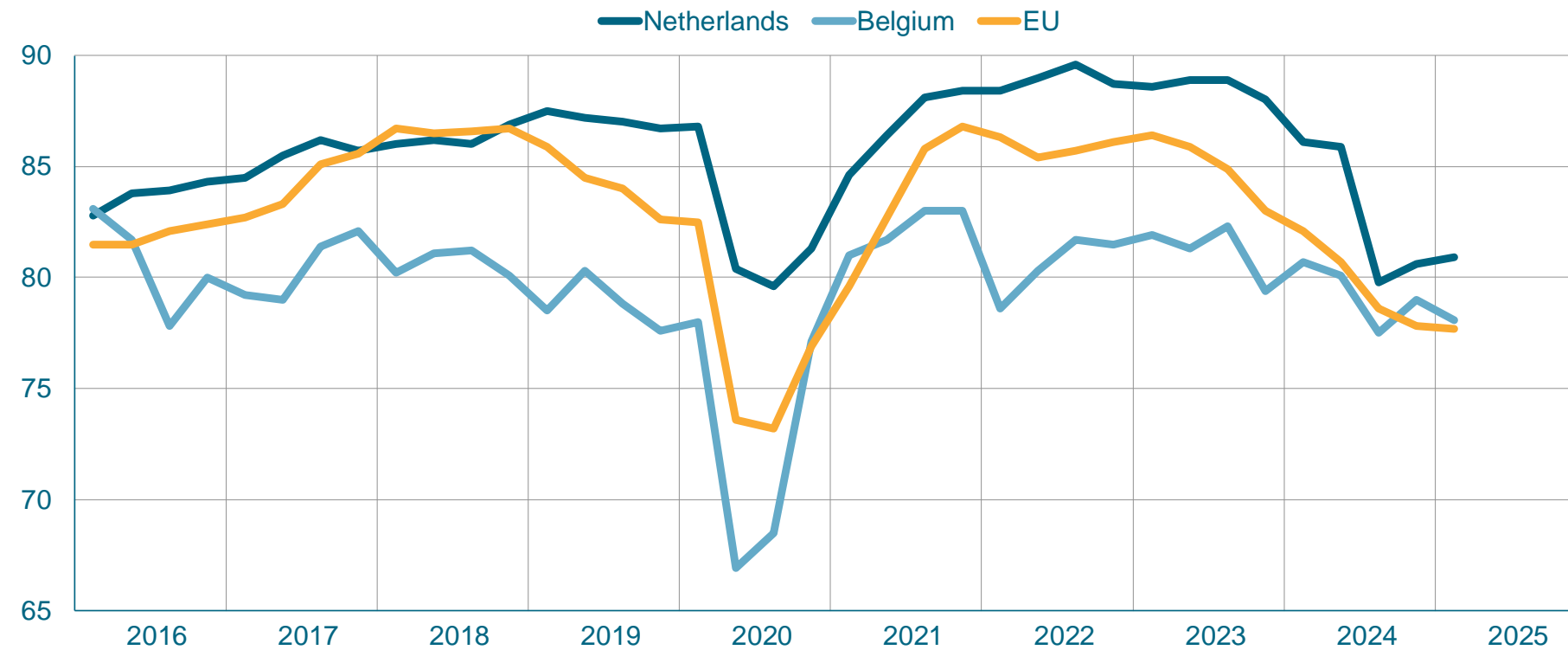


Source: Eurostat, Macrobond, VDMA

\*) NACE rev. 2 chapter 28.

# Capacity utilization in machinery and equipment manufacturing

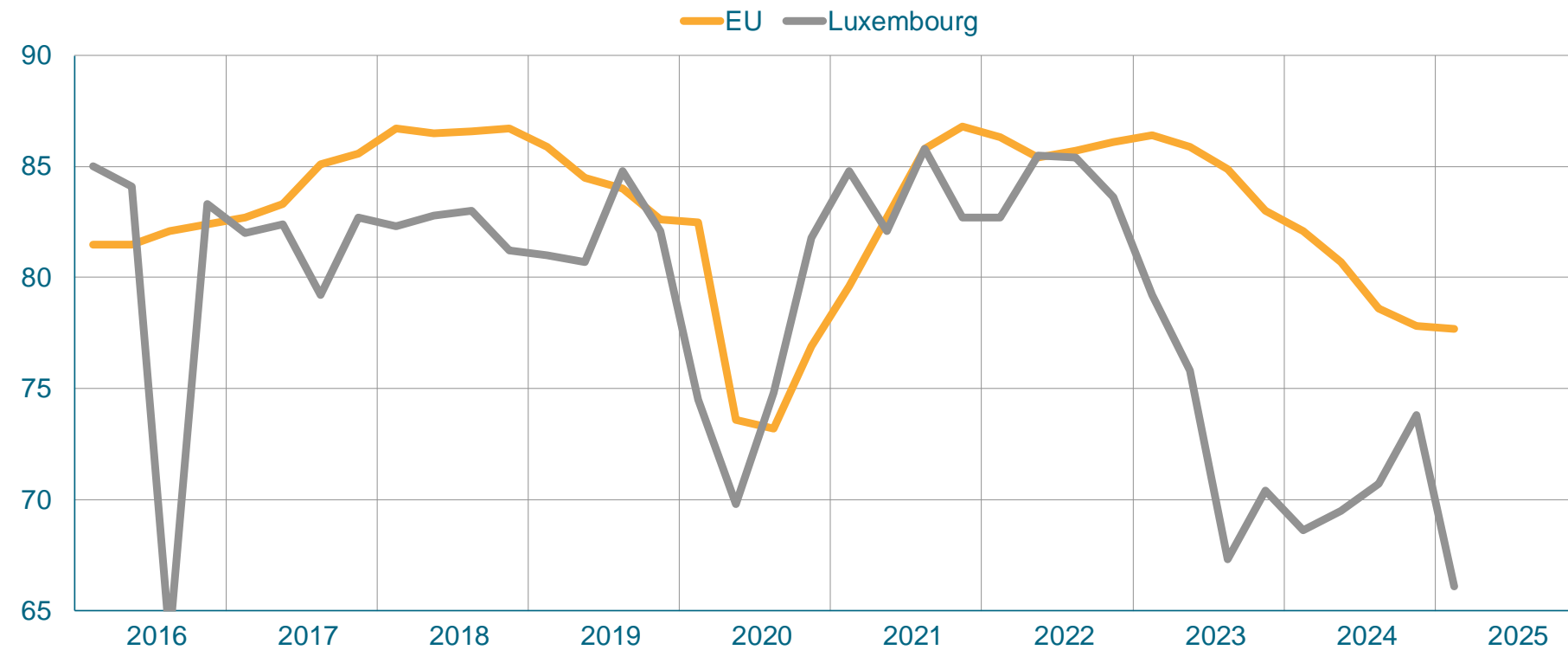
In % of full capacity level of output



Source: EU DG ECFIN, Macrobond, VDMA

# Capacity utilization in machinery and equipment manufacturing in Luxembourg

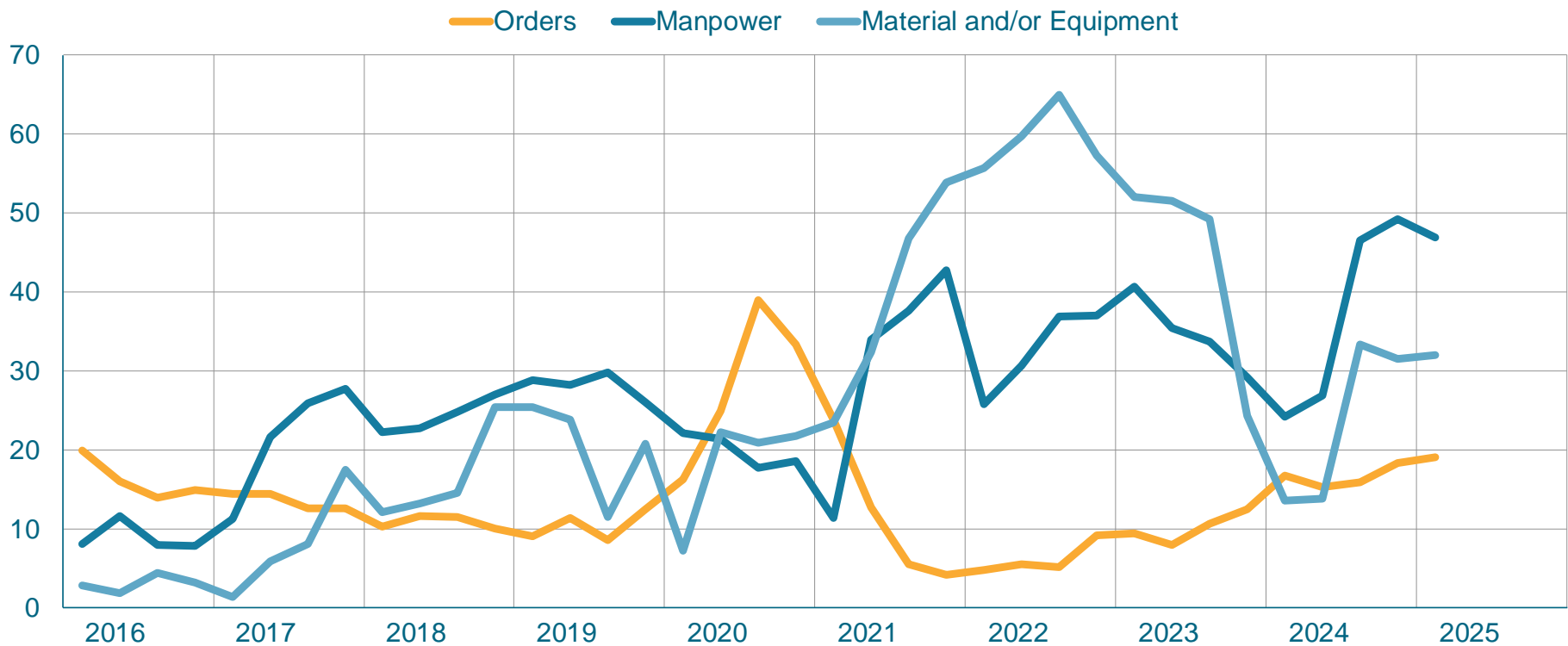
In % of full capacity level of output



Source: EU DG ECFIN, Macrobond, VDMA

# Netherlands: Limitation of production in machinery and equipment manufacturing due to a lack of ...

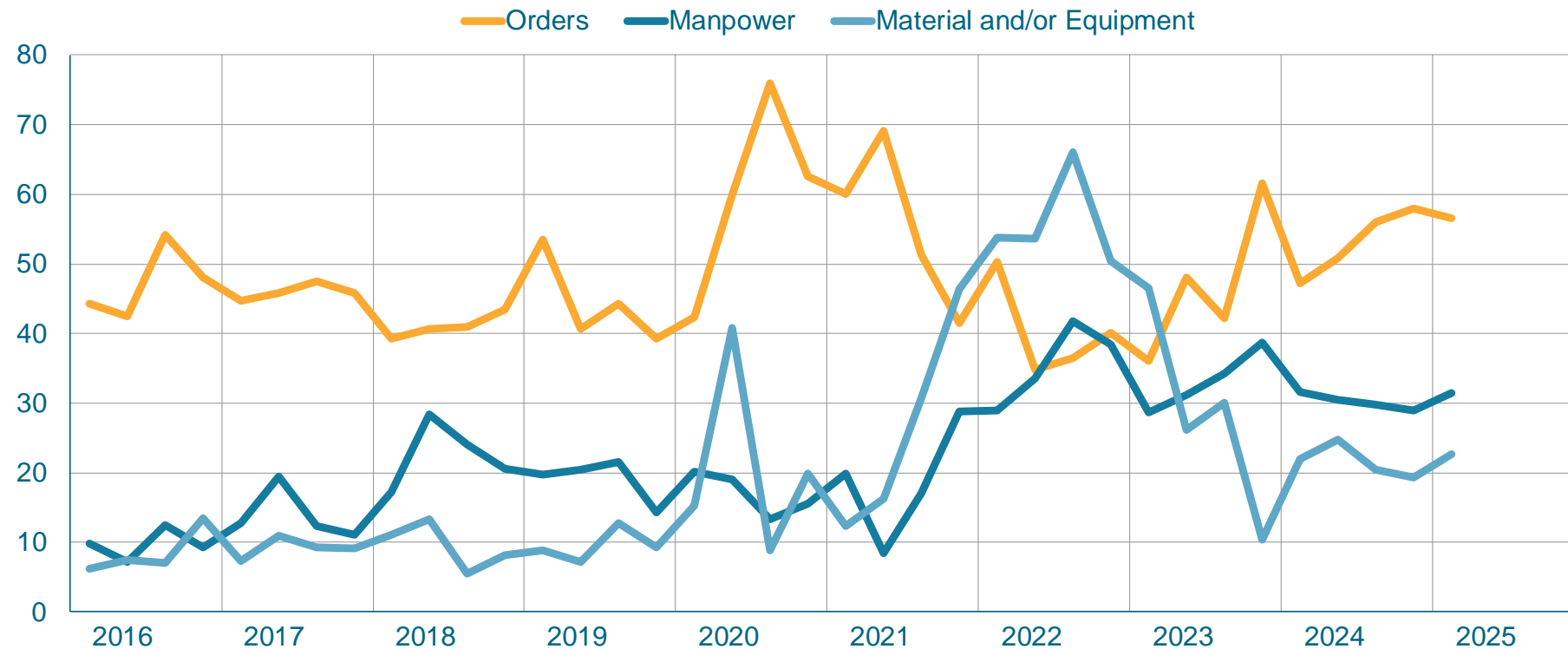
Share in percent



Source: European Comission, Macrobond, VDMA

# Belgium: Limitation of production in machinery and equipment manufacturing due to a lack of ...

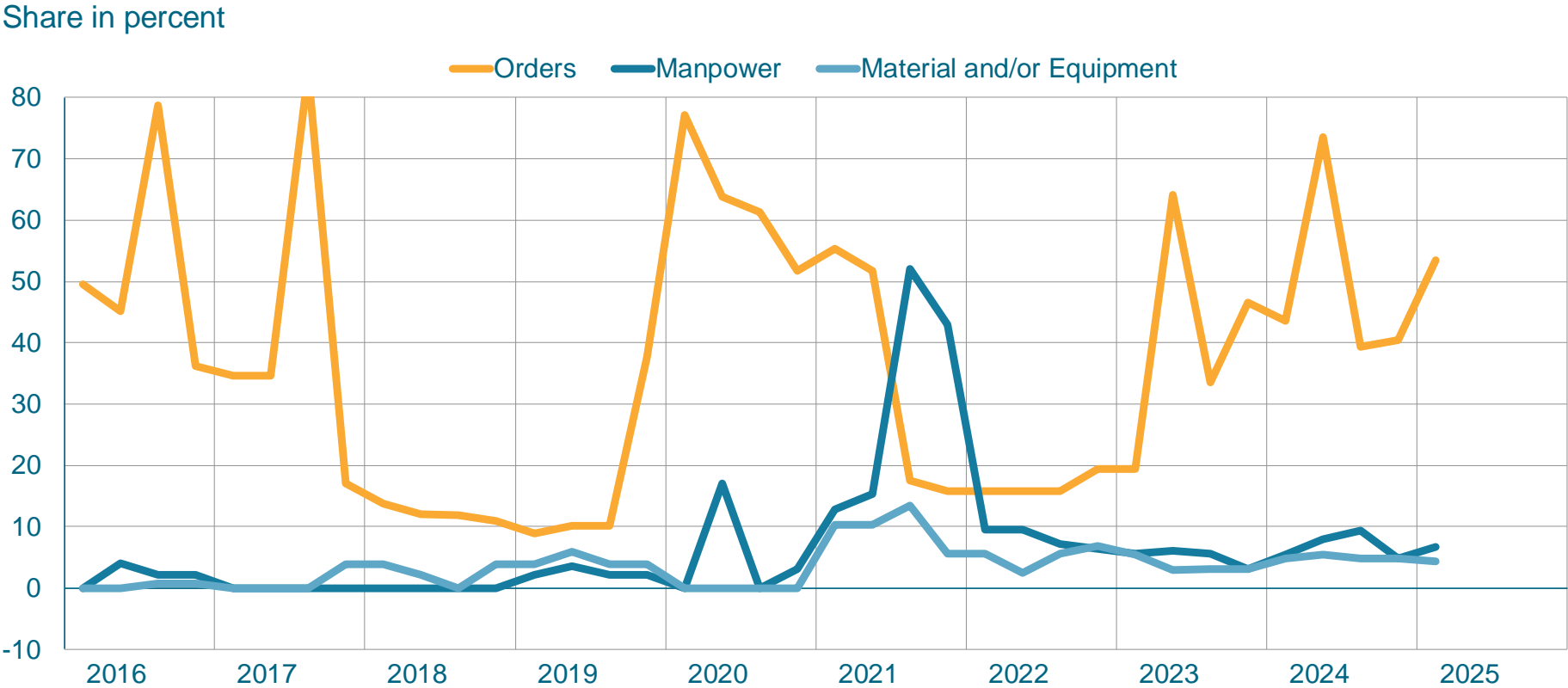
Share in percent



Source: European Commission, Macrobond, VDMA



# Luxembourg: Limitation of production in machinery and equipment manufacturing due to a lack of ...



Source: European Comission, Macrobond, VDMA

# Netherlands: Business climate in machinery and equipment manufacturing

Balance of positive and negative answers, seasonally adjusted



Source: EU Commission, Macrobond, VDMA

# Belgium: Business climate in machinery and equipment manufacturing

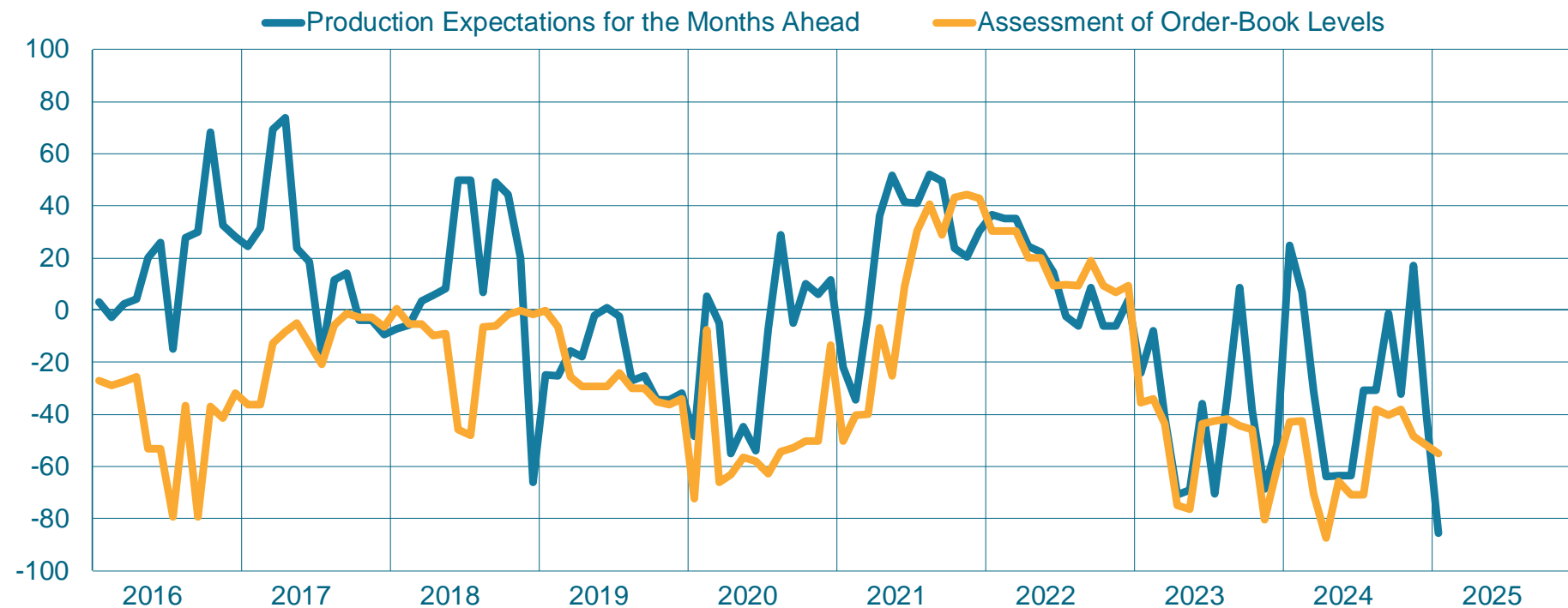
Balance of positive and negative answers, seasonally adjusted



Source: EU Commission, Macrobond, VDMA

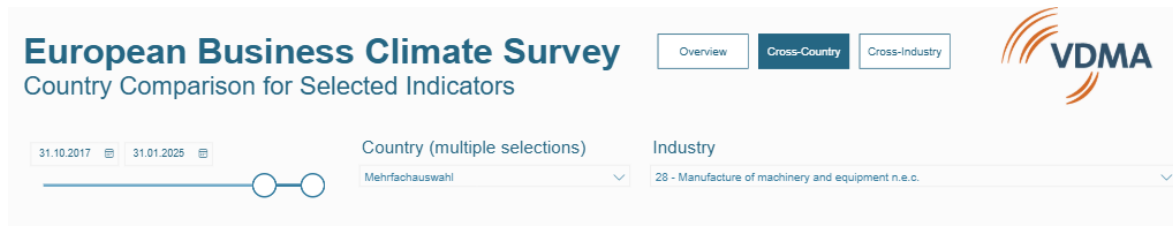
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Balance of positive and negative answers, seasonally adjusted

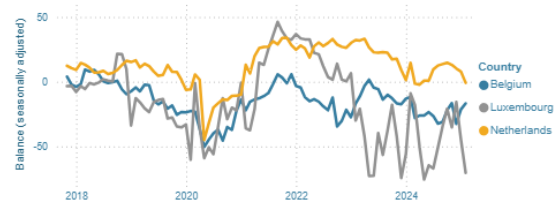


Source: EU Commission, Macrobond, VDMA

# Further information are online available for all EU member states by sectors

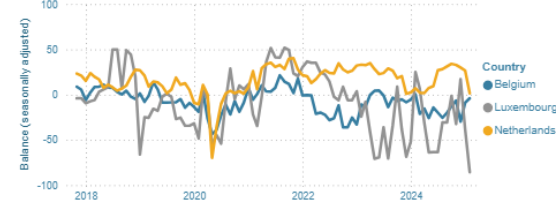


Business Climate Index



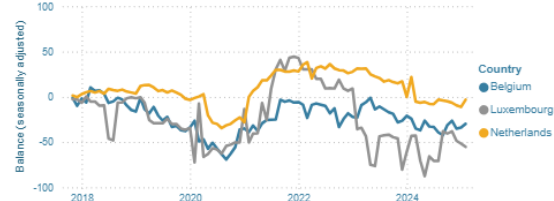
Source: European Commission, Directorate-General for Economic and Financial Affairs

Production expectations for the months ahead



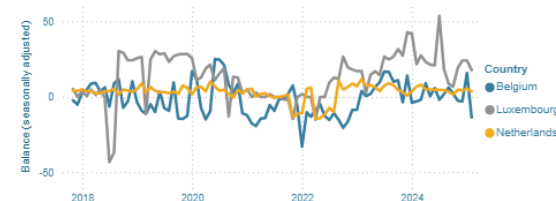
Source: European Commission, Directorate-General for Economic and Financial Affairs

Assessment of order-book levels



Source: European Commission, Directorate-General for Economic and Financial Affairs

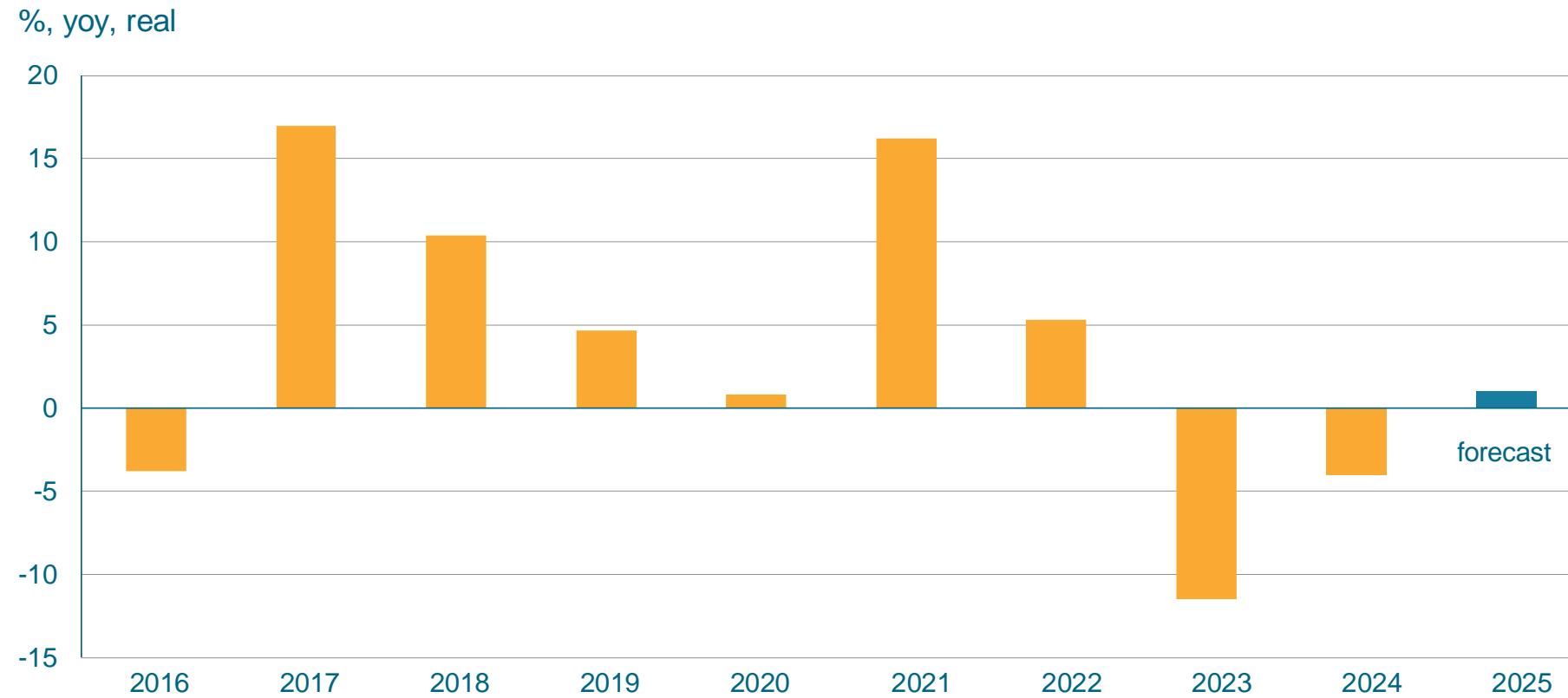
Assessment of stocks of finished products



Source: European Commission, Directorate-General for Economic and Financial Affairs

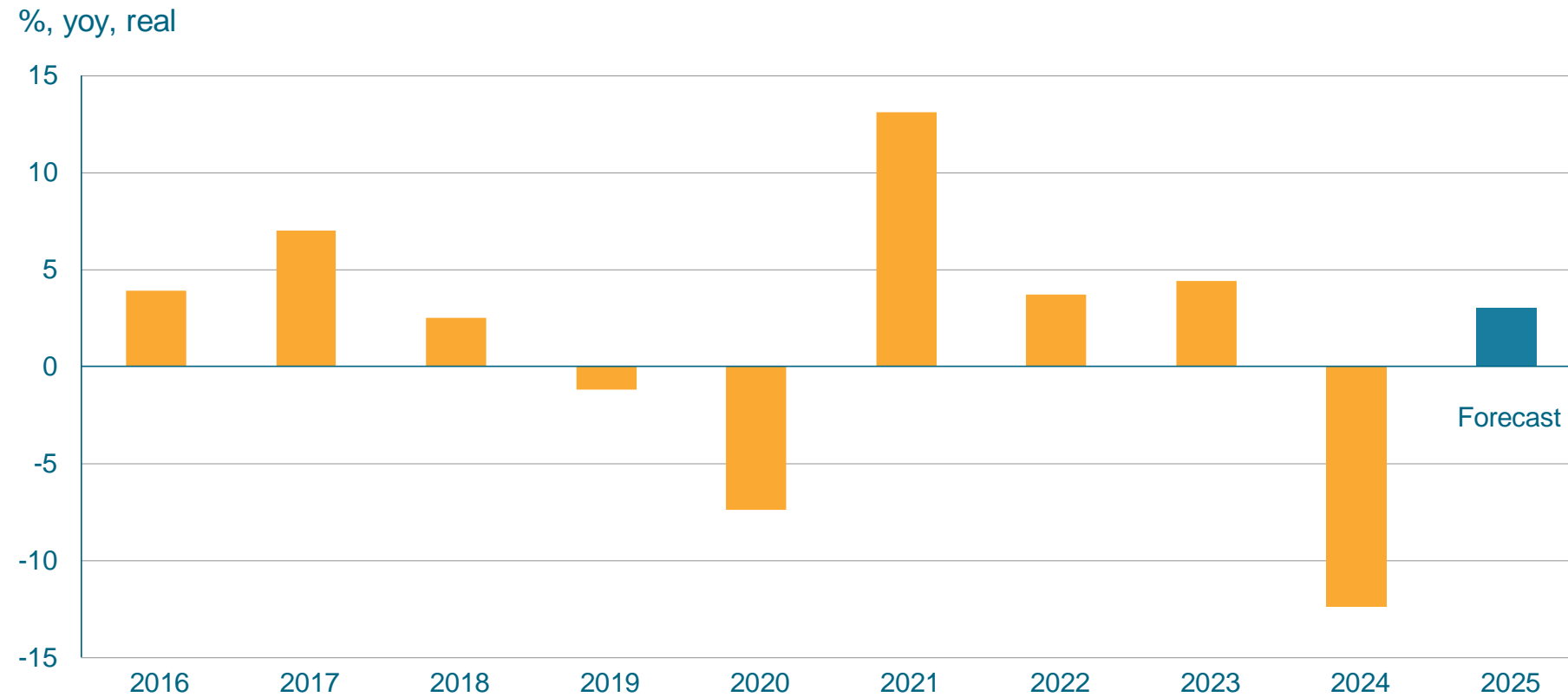
Check this website:  
[\*\*VDMA Statistics Database\*\*](#)

# Netherlands: Development of machinery turnover



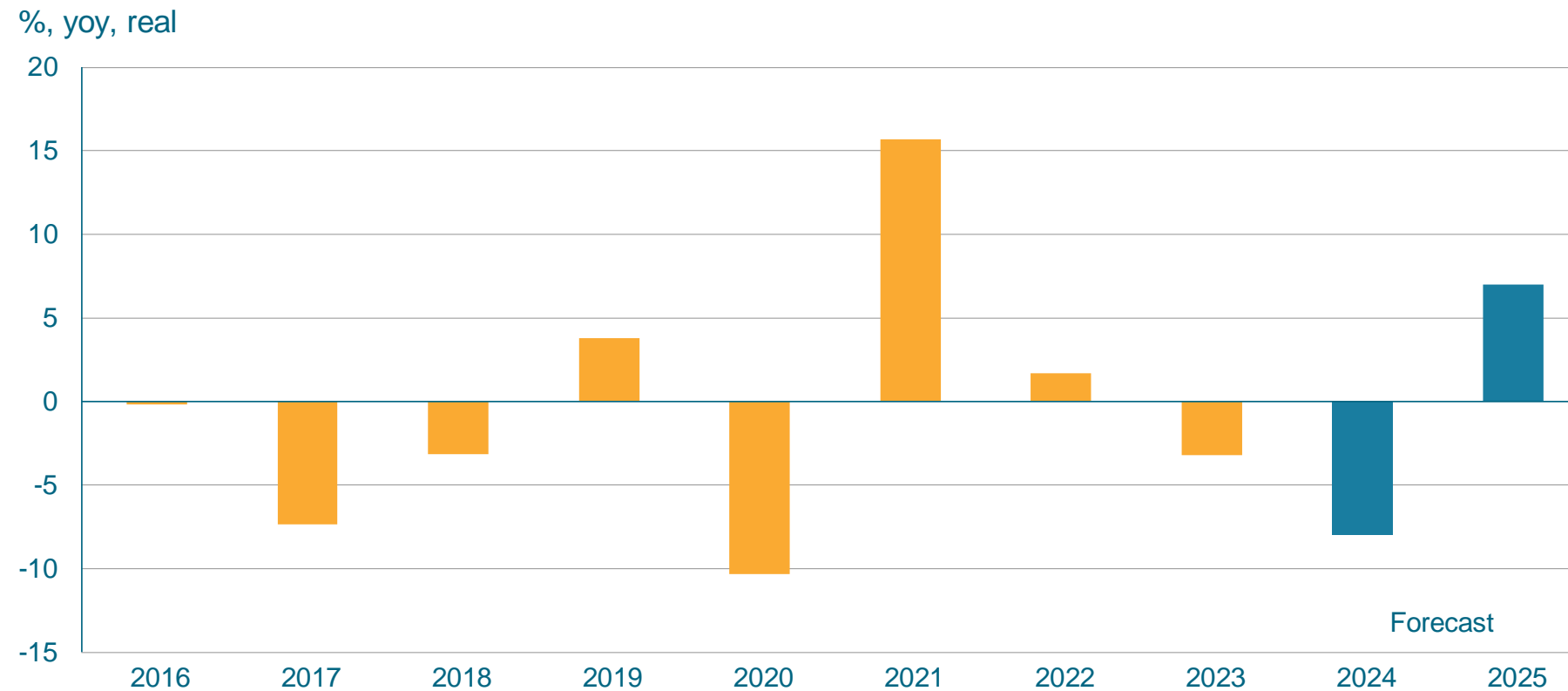
Source: Eurostat, VDMA

# Belgium: Development of machinery turnover



Source: Eurostat, VDMA

# Luxembourg: Development of machinery turnover



Source: Oxford Economics Ltd., VDMA



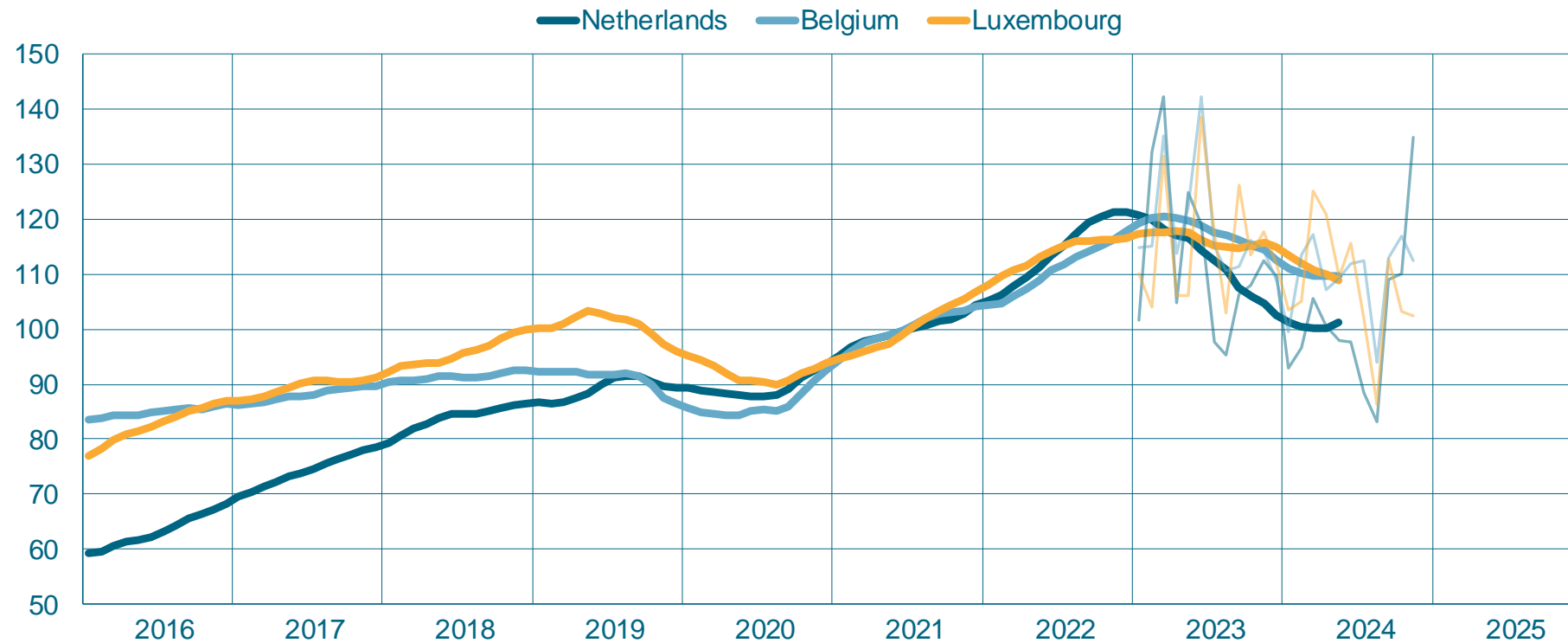
## Netherlands, Belgium, Luxembourg

### Machinery and plant engineering

- Trade links

# Machinery exports of Netherlands, Belgium and Luxembourg

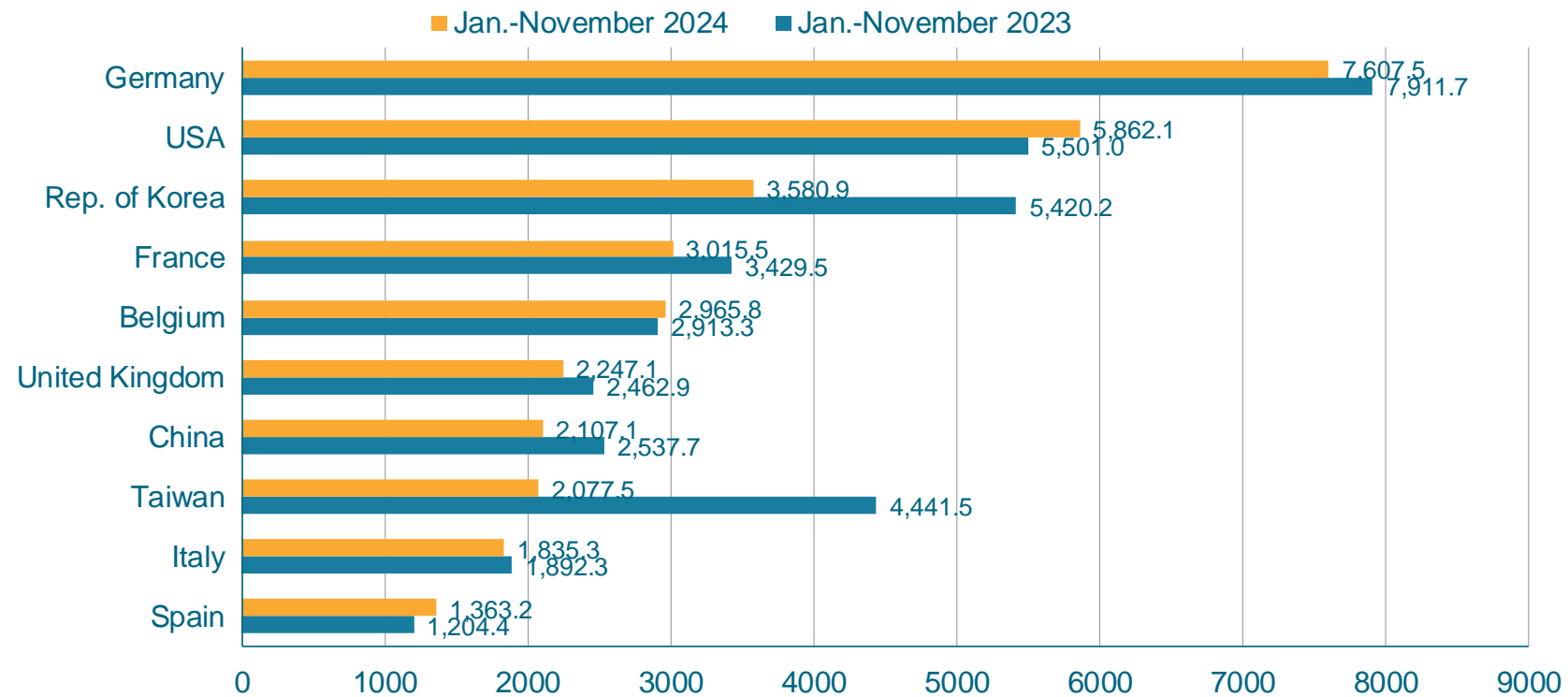
12-month moving average, Index 2021=100



Source: Eurostat, VDMA

# Netherlands: Machinery exports TOP 10 countries

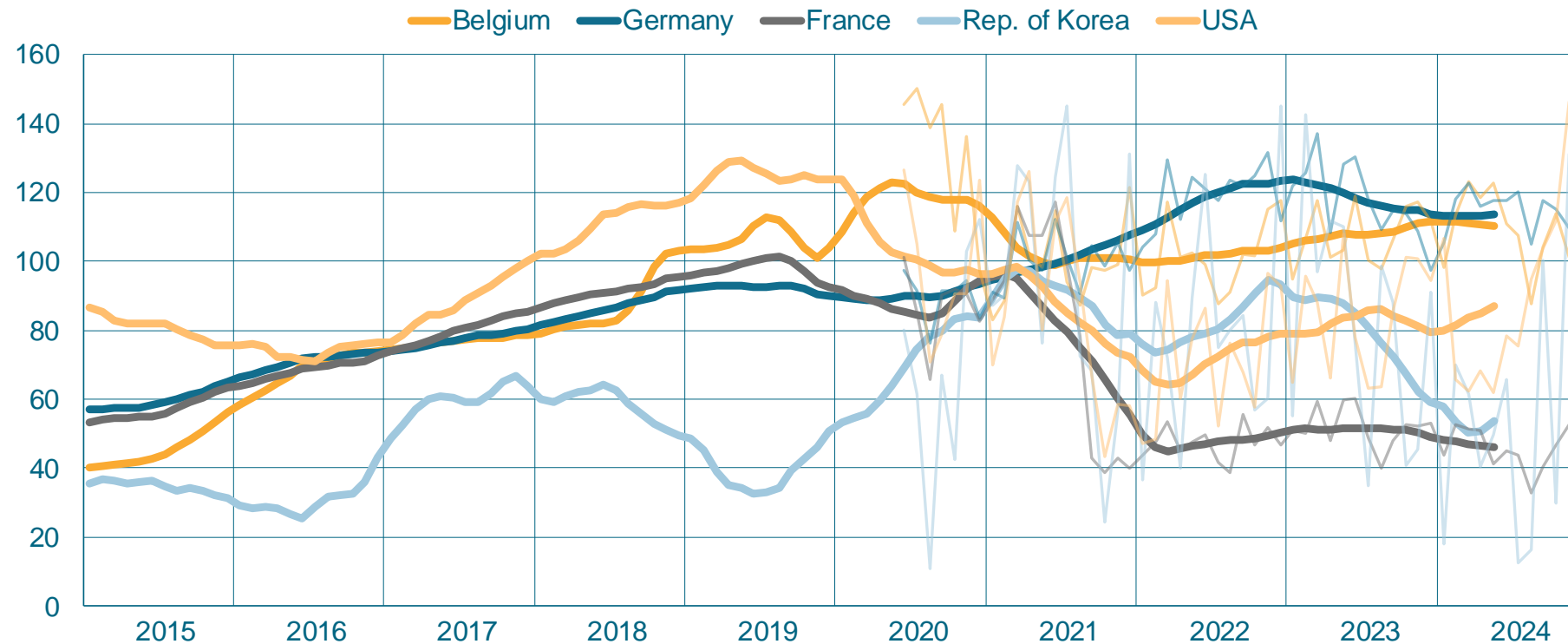
m EUR



Source: Eurostat, VDMA

# Netherlands: Machinery exports in the Top-5 export countries

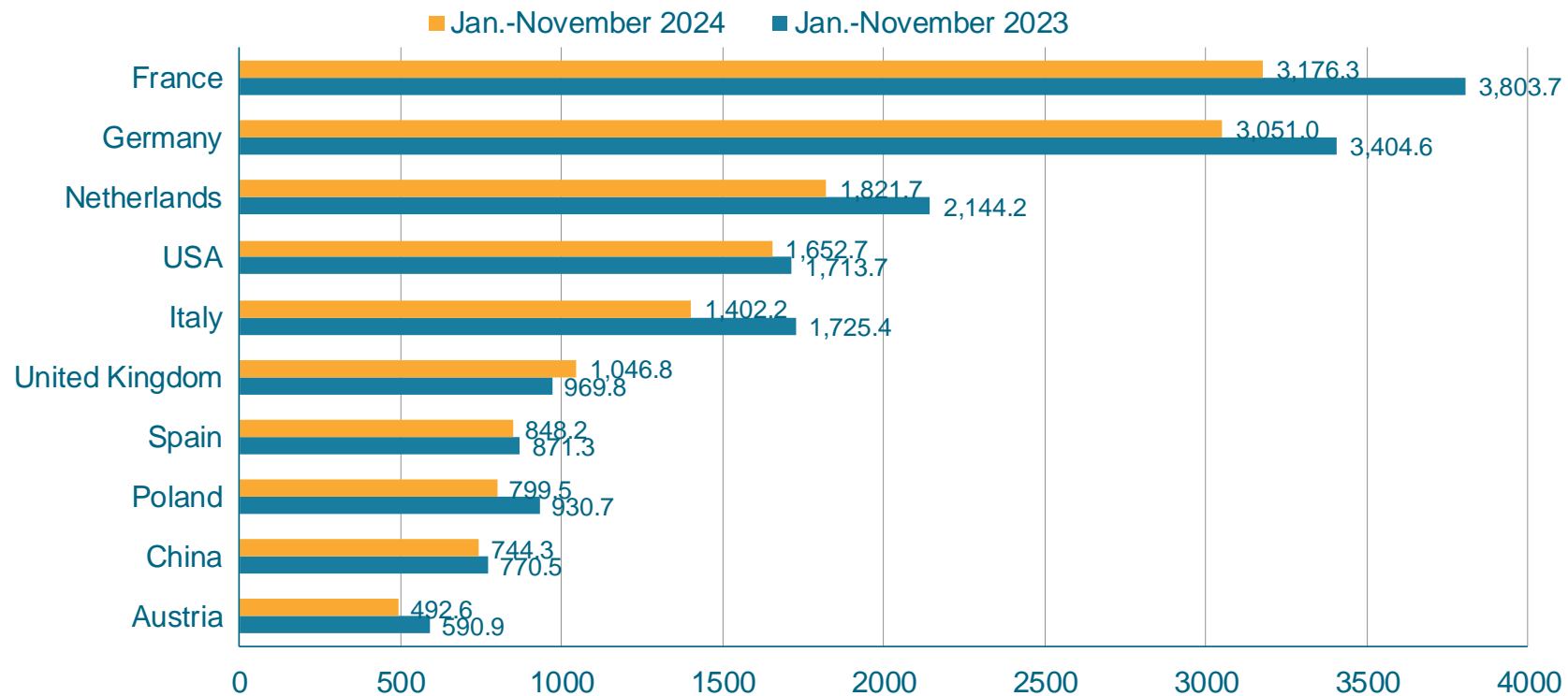
12-month moving average, Index 2021=100



Source: Eurostat, VDMA

# Belgium: Machinery exports TOP 10 countries

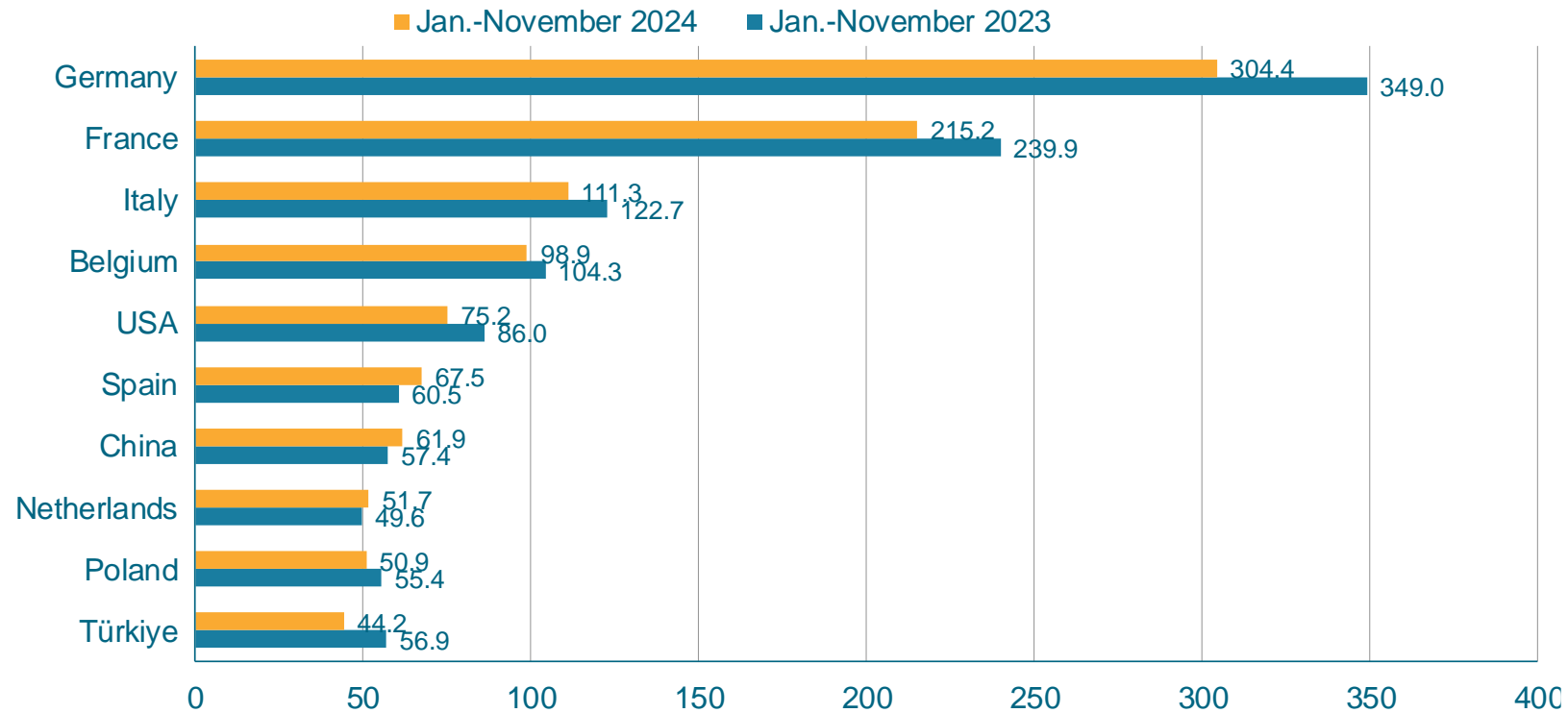
m EUR



Source: Eurostat, VDMA

# Luxembourg: Machinery exports TOP 10 countries

m EUR

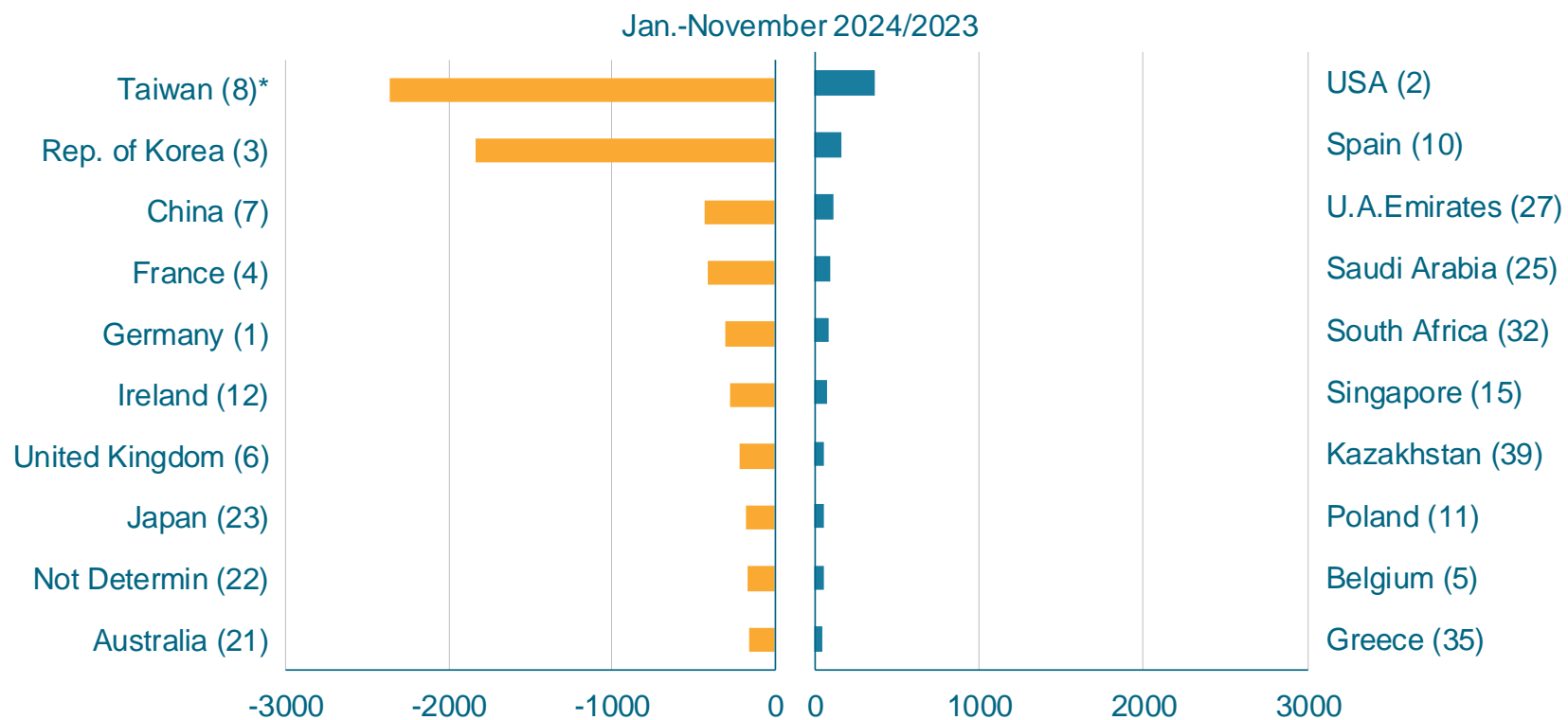


Source: Eurostat, VDMA

# Netherlands: Machinery exports by countries

## Absolutely highest decreases/increases

In m EUR



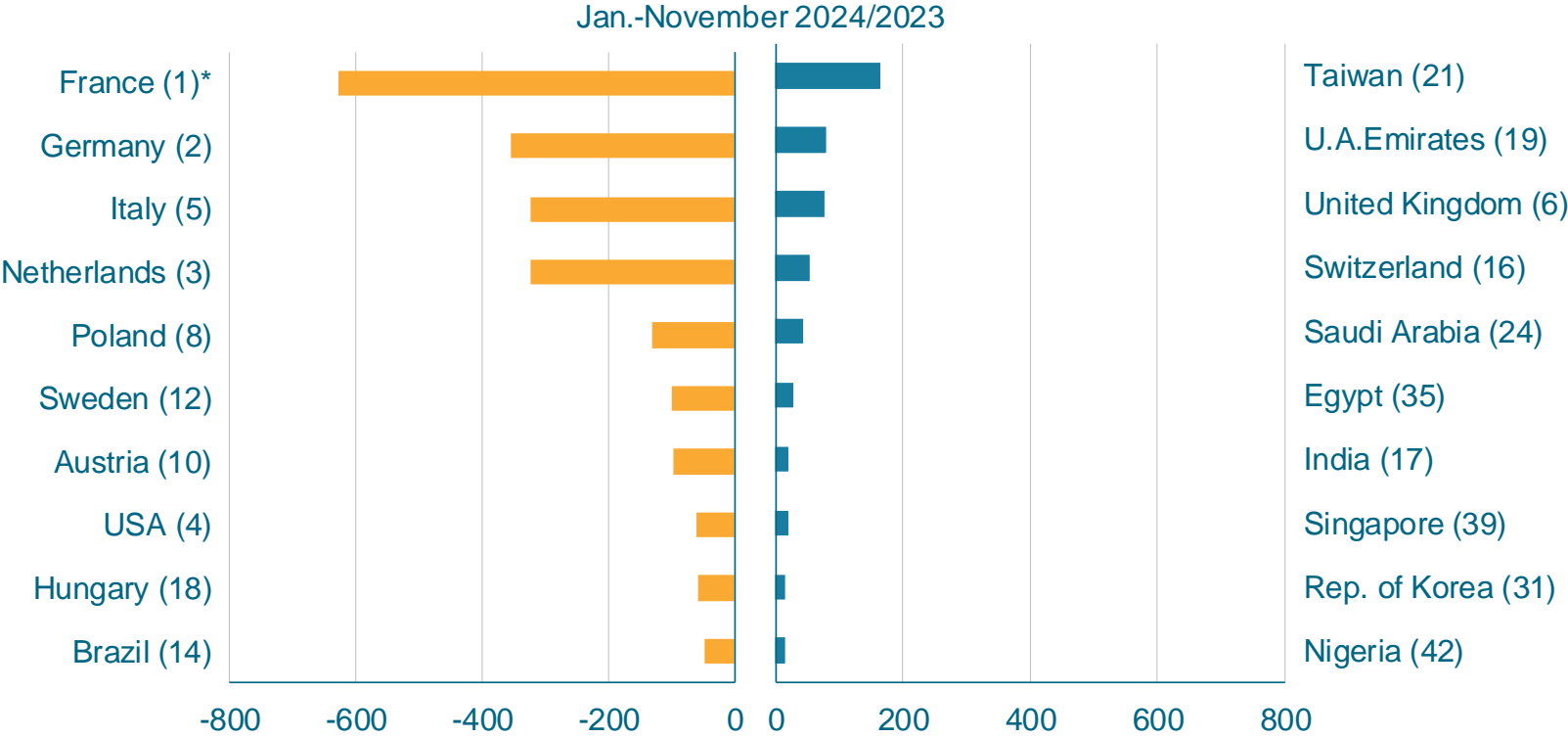
Source: Eurostat, VDMA

\*) Rank of country within the top 50 destinations of Netherlands machinery exports.

# Belgium: Machinery exports by countries

## Absolutely highest decreases/increases

In m EUR



Source: Eurostat, VDMA

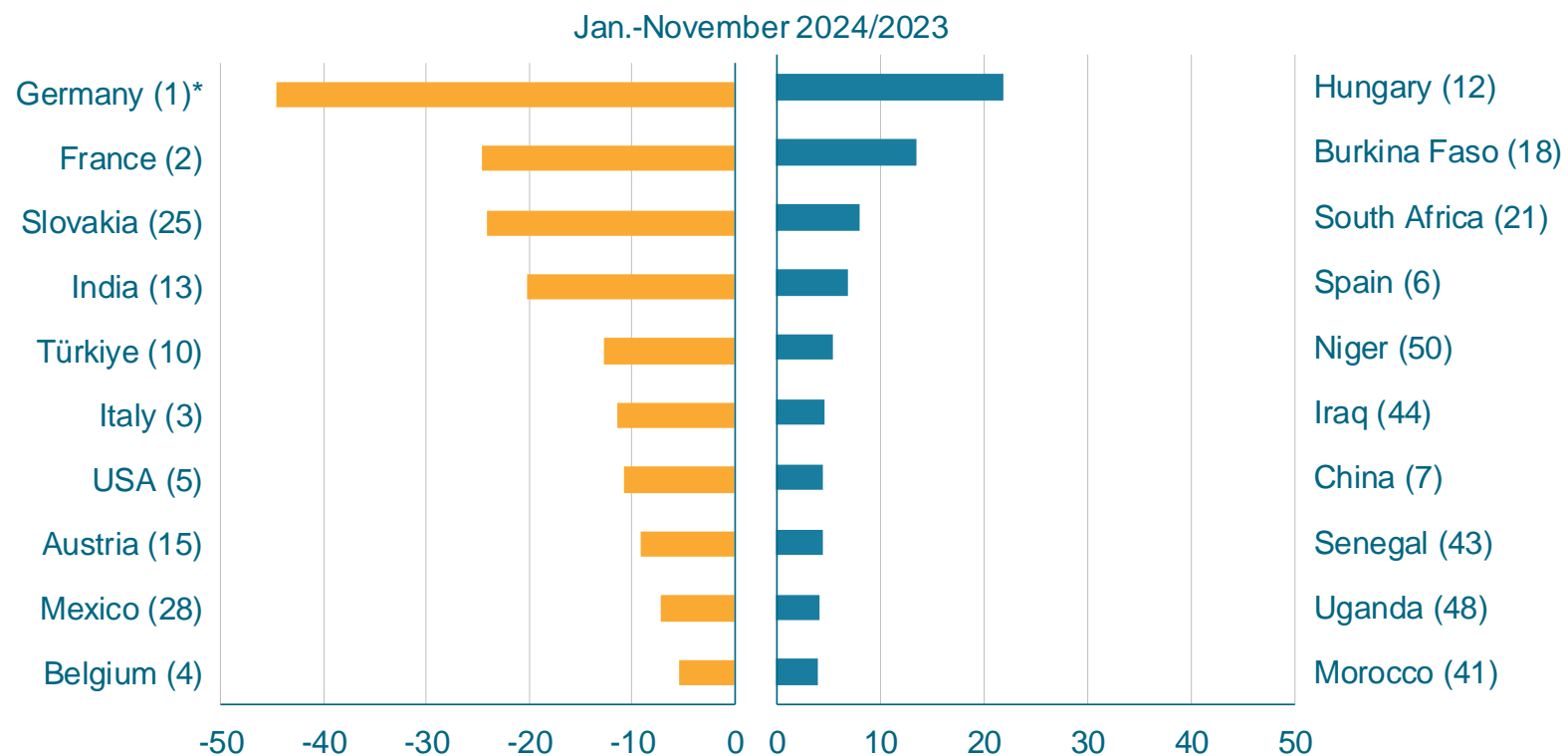
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# Luxembourg: Machinery exports by countries

## Absolutely highest decreases/increases

In m EUR

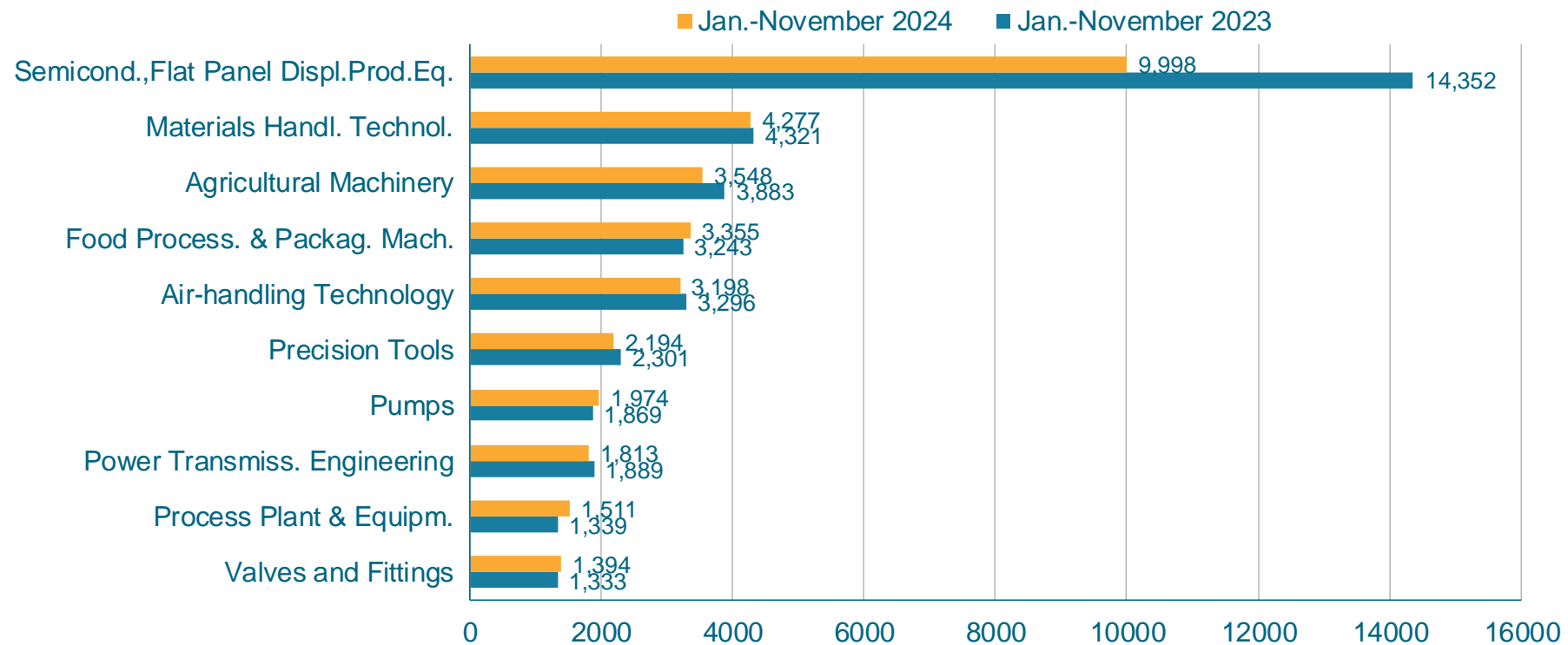


Source: Eurostat, VDMA

\*) Rank of country within the top 50 destinations of Luxembourg machinery exports.

# Netherlands: Machinery exports for Top-10 Sectors

m EUR

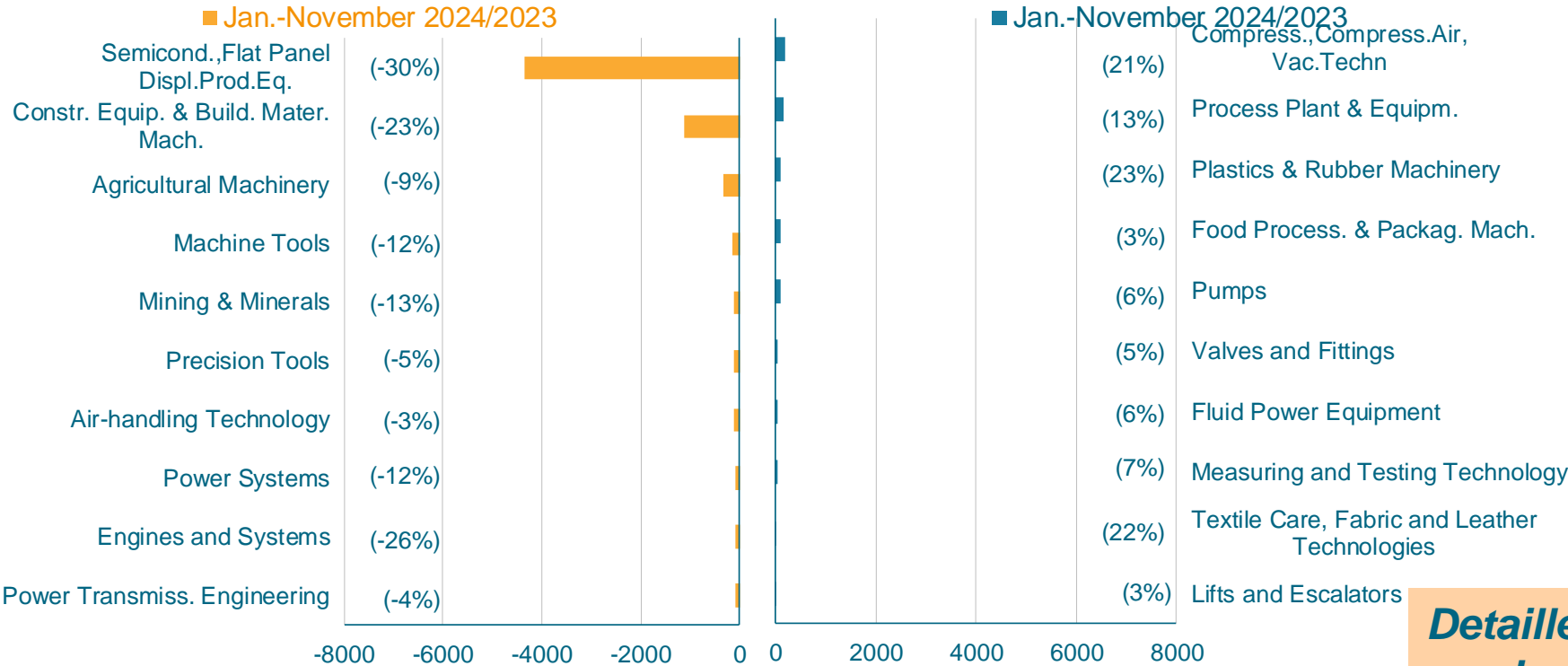


Source: Eurostat, VDMA

# Netherlands: Machinery by subsectors

## Absolutely highest decreases/increases

Absolutely highest decreases/increases in m Euro (Change to previous year in %)



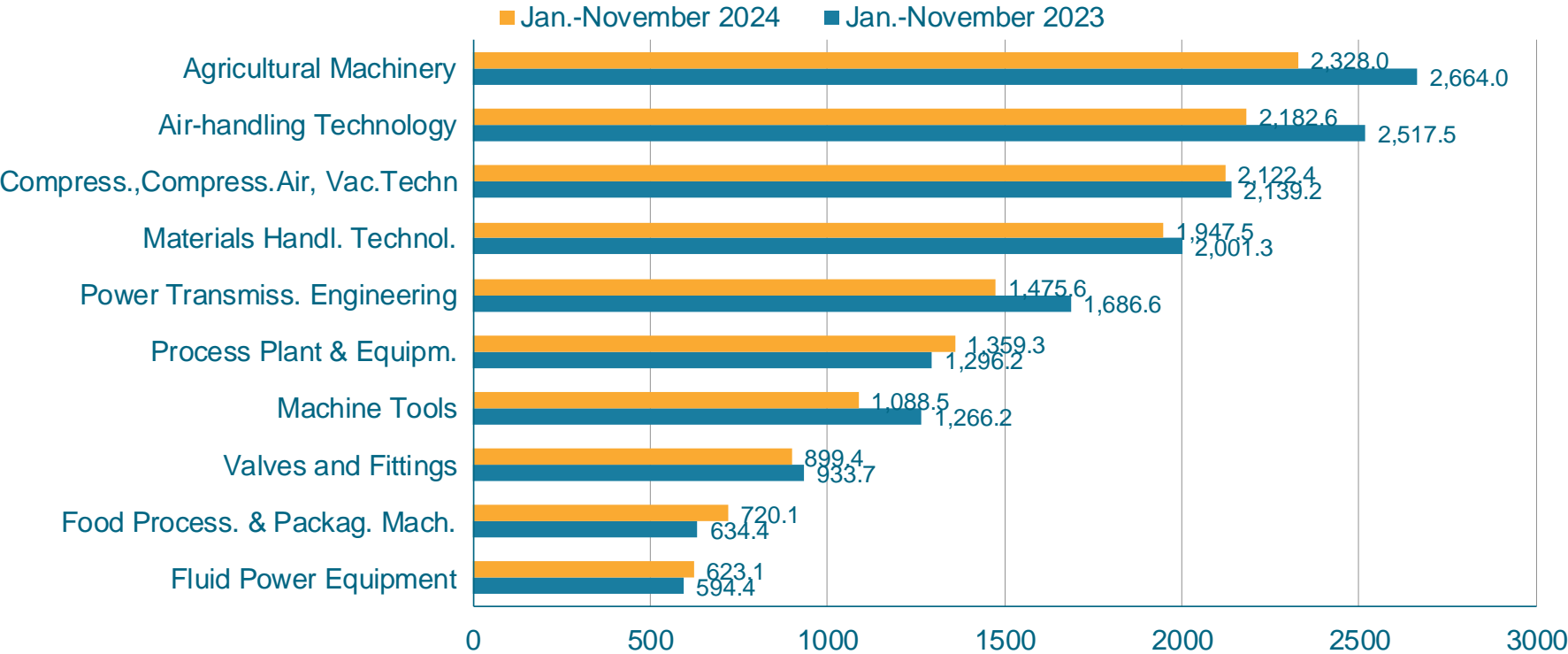
Source: Eurostat, VDMA

**Detailed information by product groups:**  
[VDMA statistics database](#)

# Belgium: Machinery exports for Top-10 Sectors



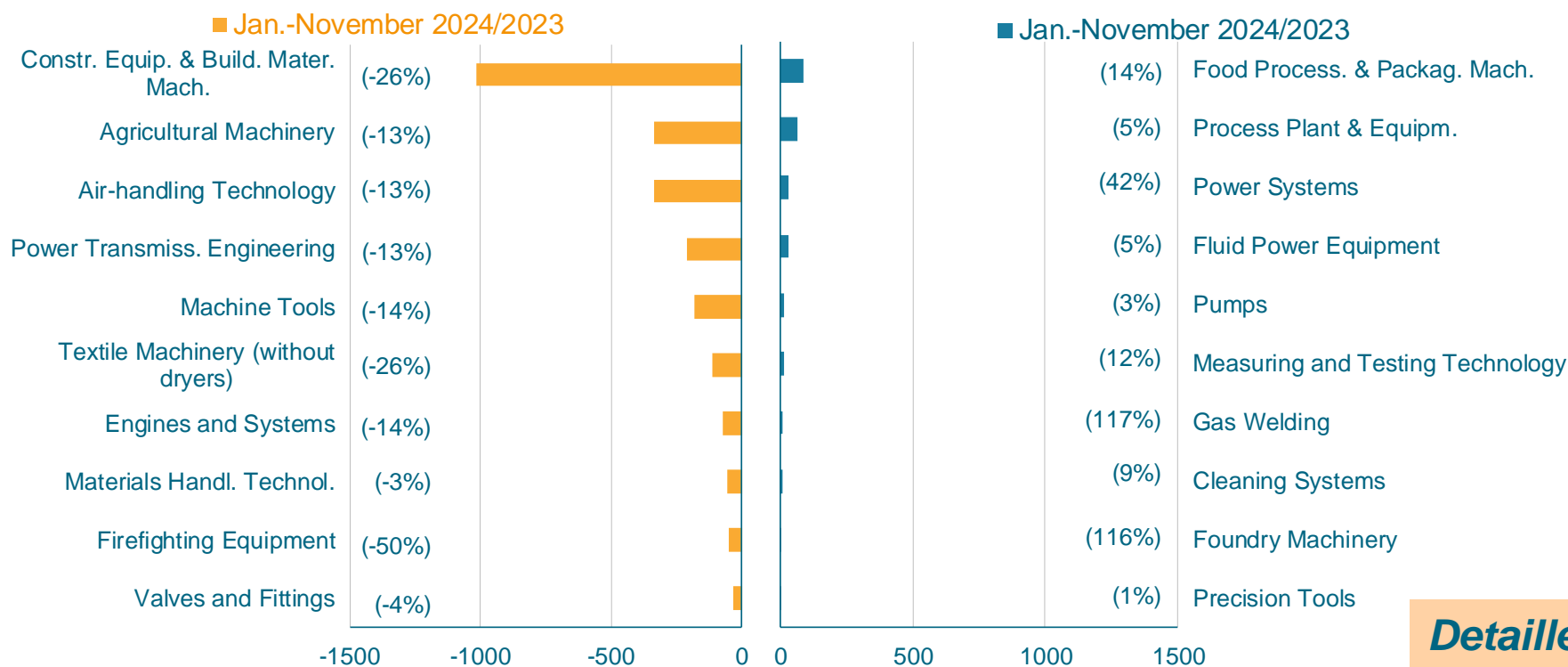
m EUR



# Belgium: Machinery by subsectors

## Absolutely highest decreases/increases

Absolutely highest decreases/increases in m Euro (Change to previous year in %)

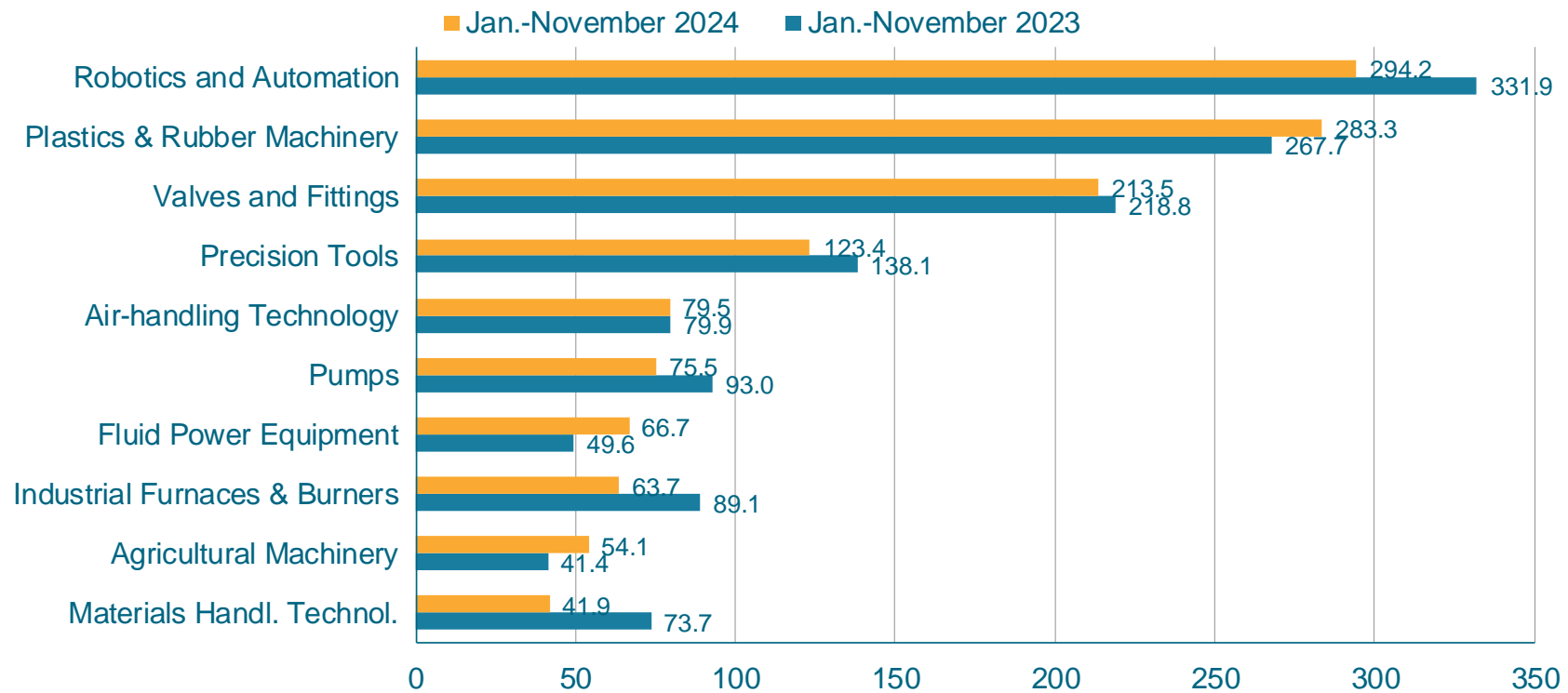


Source: Eurostat, VDMA

**Detailed information by product groups:**  
[VDMA statistics database](#)

# Luxembourg: Machinery exports for Top-10 Sectors

m EUR

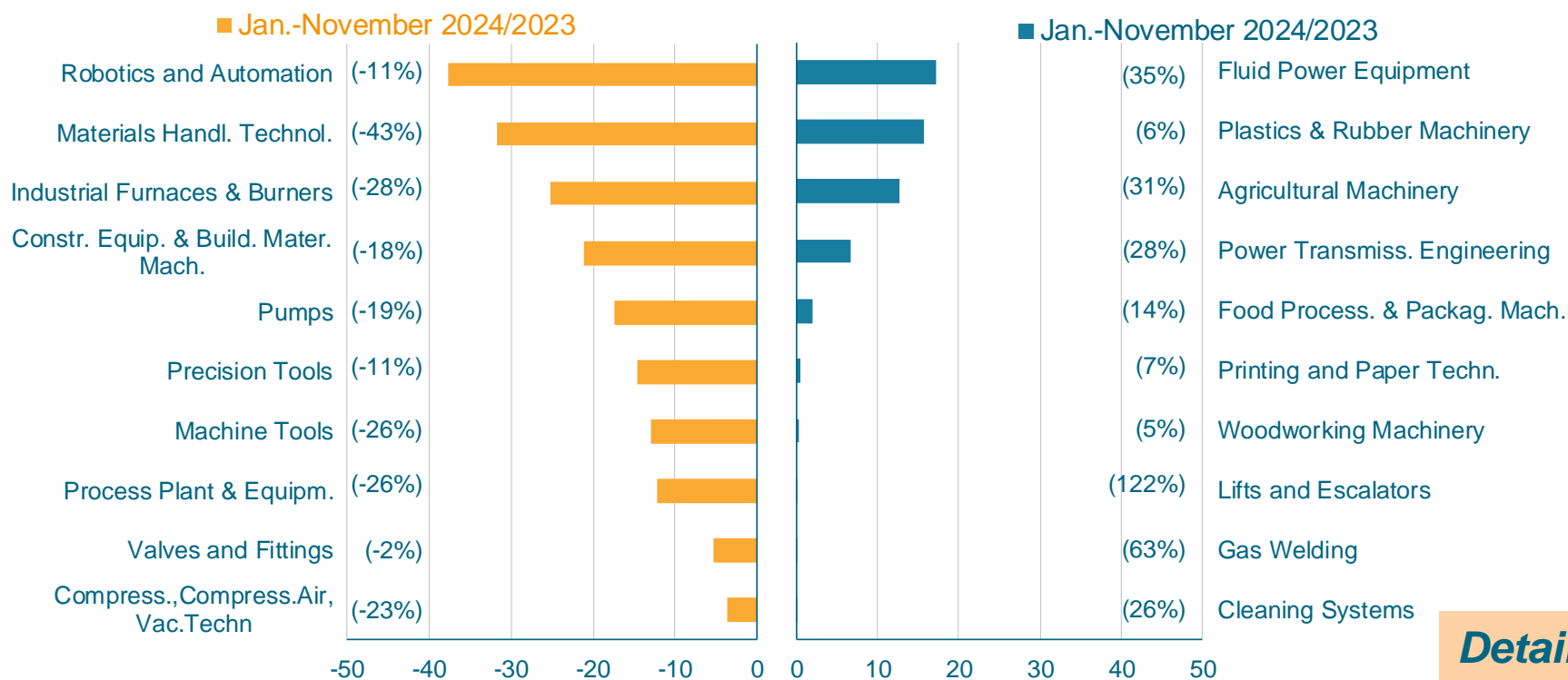


Source: Eurostat, VDMA

# Luxembourg: Machinery by subsectors

## Absolutely highest decreases/increases

Absolutely highest decreases/increases in m Euro (Change to previous year in %)



Source: Eurostat, VDMA

**Detailed information by product groups:**  
[VDMA statistics database](#)

# Netherland: Machinery exports

## Machinery exports of Netherlands

Year	Total m EUR	Country shares in %					
		DE	US	KR	TW	FR	BE
2014	29,302	13.5	13.8	6.3	4.3	5.5	3.8
2015	30,595	13.9	11.2	6.8	4.8	5.5	4.2
2016	33,635	15.5	8.5	4.4	5.3	6.3	6.3
2017	39,707	14.0	9.1	8.6	4.7	6.1	5.7
2018	45,448	13.7	10.3	8.2	5.5	6.1	5.3
2019	48,899	13.6	10.7	3.8	12.7	6.2	6.8
2020	47,024	13.9	8.9	8.7	9.8	5.5	7.6
2021	53,659	13.4	7.7	10.7	13.8	5.7	5.5
2022	61,484	14.0	8.4	9.3	14.4	5.6	4.9
2023	60,484	14.1	10.0	9.9	7.9	6.2	5.3

Source: Eurostat, VDMA



# Belgium: Machinery exports

## Machinery exports of Belgium

Year	Total m EUR	Country shares in %					
		FR	DE	NL	US	IT	PL
2014	19,641	13.4	12.6	6.1	7.0	5.0	2.5
2015	19,351	13.7	12.5	7.2	6.5	5.5	2.8
2016	19,827	13.6	12.6	6.9	6.6	5.7	2.7
2017	20,515	13.9	12.0	6.9	6.8	5.8	2.7
2018	21,317	13.8	12.6	7.3	6.9	5.9	3.1
2019	21,402	14.9	12.5	8.0	6.7	6.0	2.9
2020	19,994	15.4	12.8	8.0	6.2	5.6	3.0
2021	23,348	17.6	12.8	7.5	6.2	6.7	3.5
2022	25,991	17.0	13.3	8.4	6.3	6.9	3.3
2023	27,483	15.0	13.3	8.5	6.9	6.8	3.7

Source: Eurostat, VDMA

# Luxembourg: Machinery exports

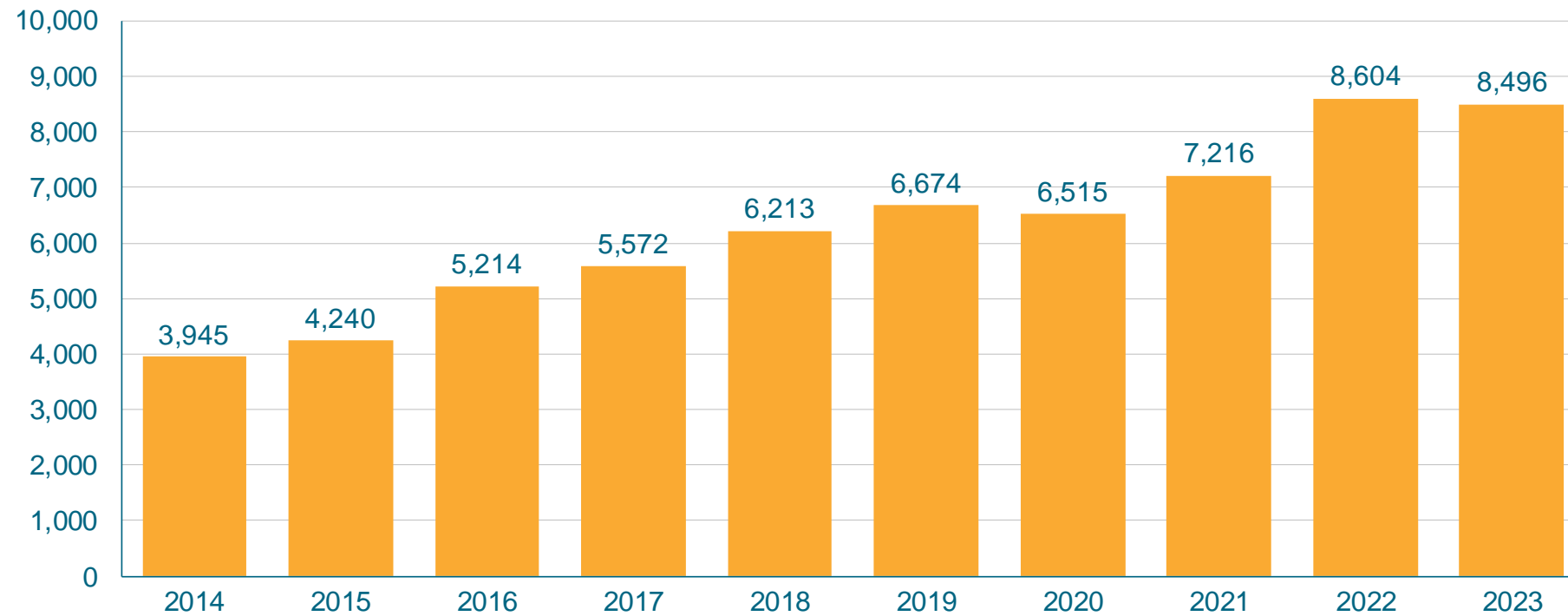
## Machinery exports of Luxembourg

Year	Total m EUR	Country shares in %					
		DE	FR	IT	BE	US	ES
2014	1,059	17.8	12.7	3.5	5.6	4.6	2.4
2015	1,157	17.8	11.9	4.5	5.6	5.4	3.3
2016	1,419	20.8	13.7	6.3	5.7	4.2	3.6
2017	1,551	19.9	13.6	6.9	5.9	4.5	3.9
2018	1,636	19.5	14.5	7.2	5.4	4.3	4.2
2019	1,752	18.6	15.0	6.9	5.9	4.6	3.4
2020	1,556	18.5	14.2	6.3	6.6	4.8	3.7
2021	1,716	17.7	13.8	7.4	5.2	4.6	3.3
2022	1,965	18.8	13.5	6.8	5.3	5.1	3.3
2023	2,009	19.2	13.3	6.8	5.7	4.7	3.3

Source: Eurostat, VDMA

# Netherlands: Machinery exports to Germany

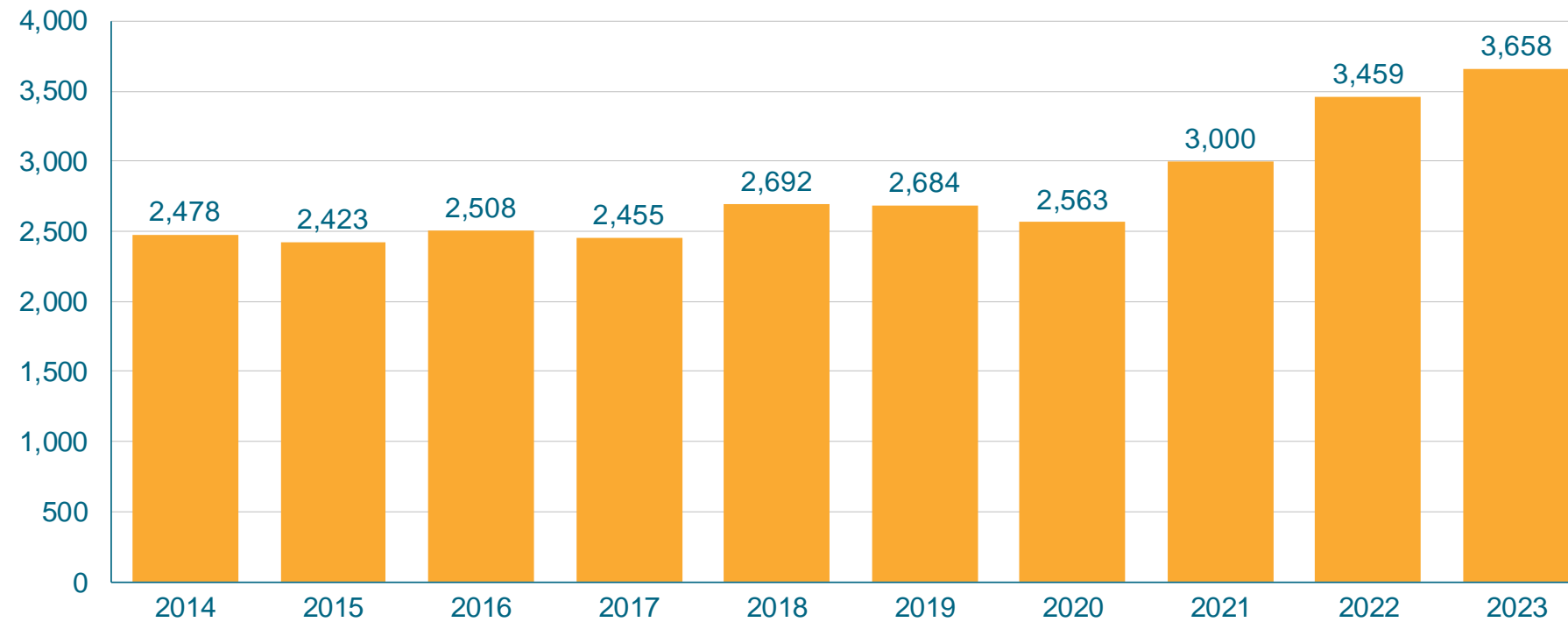
In m EUR



Source: Eurostat, VDMA

# Belgium: Machinery exports to Germany

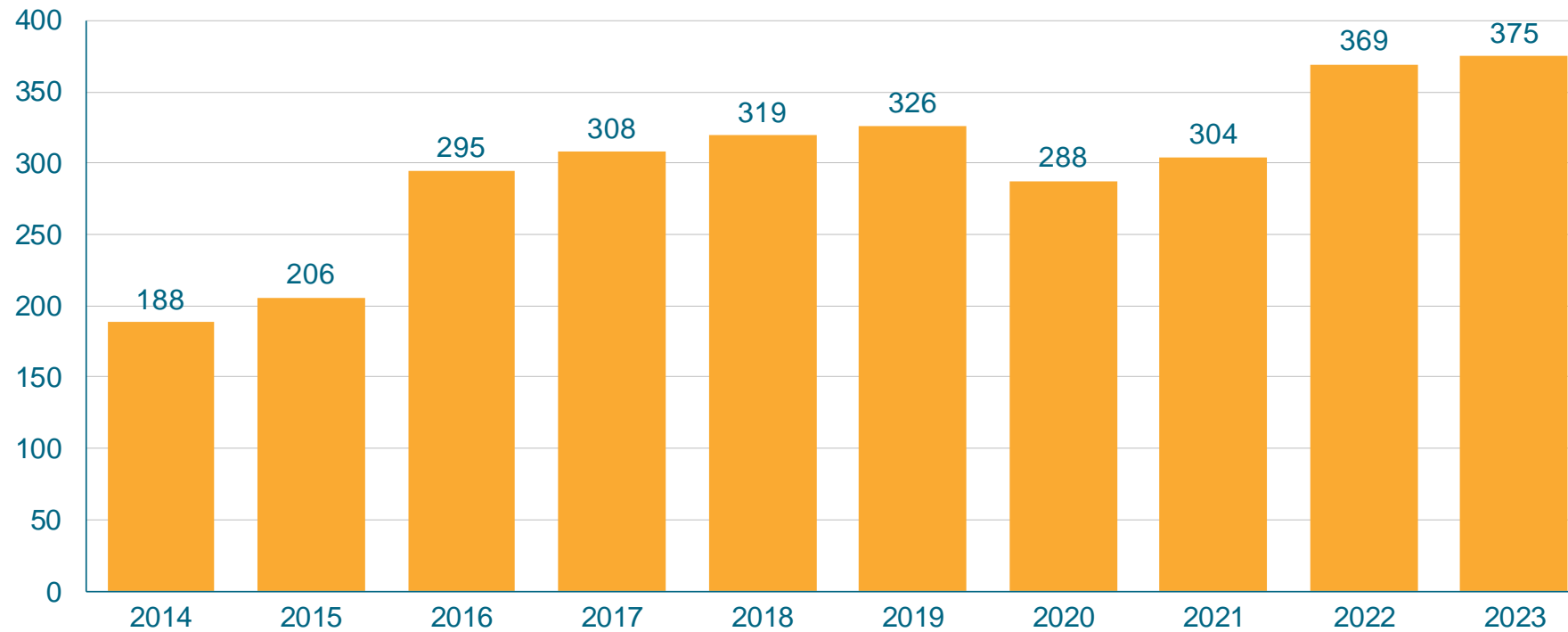
In m EUR



Source: Eurostat, VDMA

# Luxembourg: Machinery exports to Germany

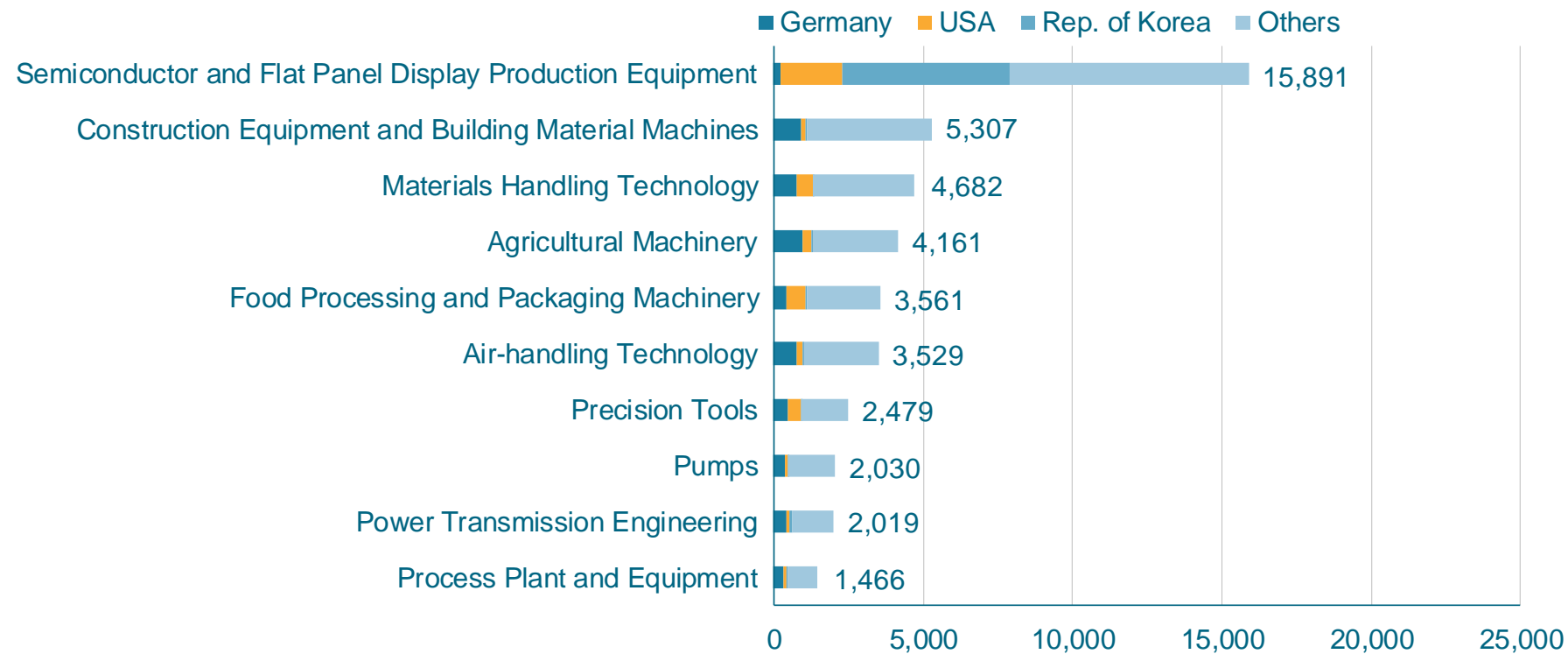
In m EUR



Source: Eurostat, VDMA

# Netherlands: Machinery exports by subsectors and countries

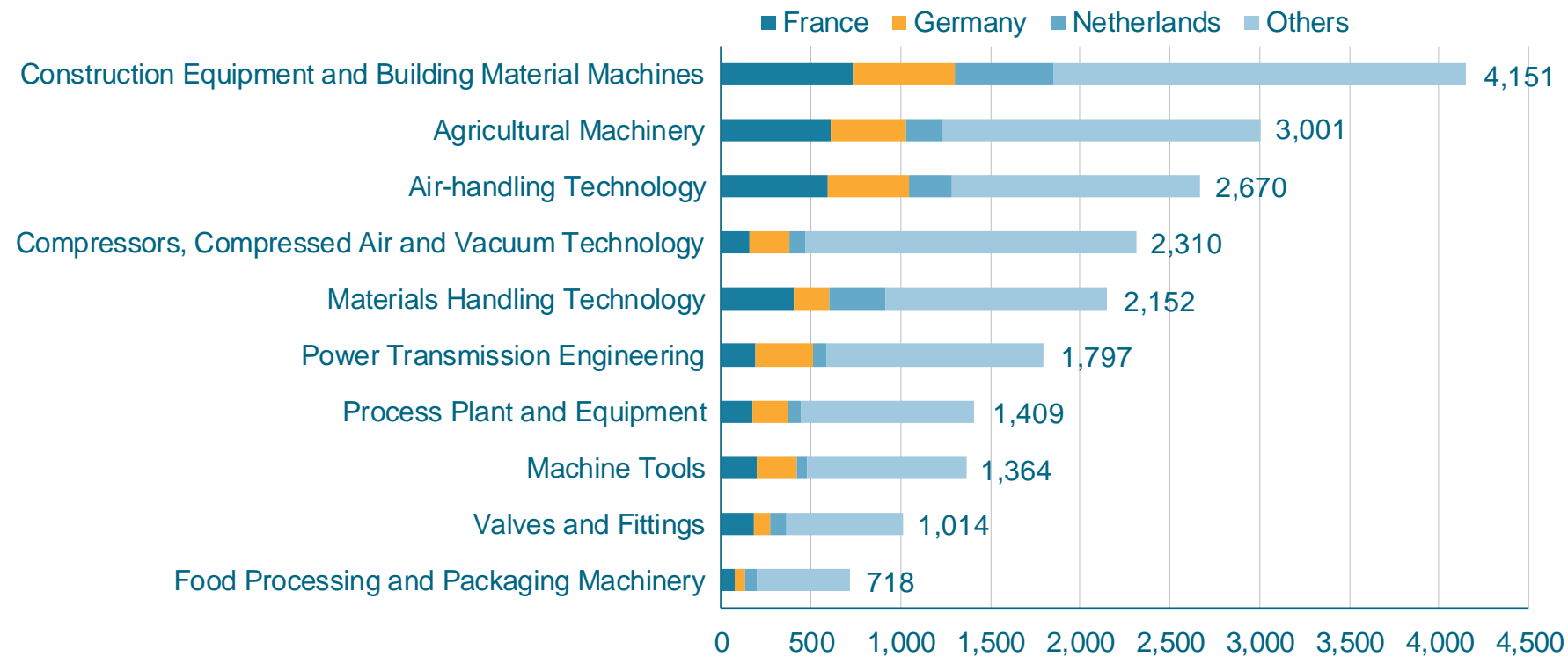
m EUR, 2023



Source: Eurostat, VDMA

# Belgium: Machinery exports by subsectors and countries

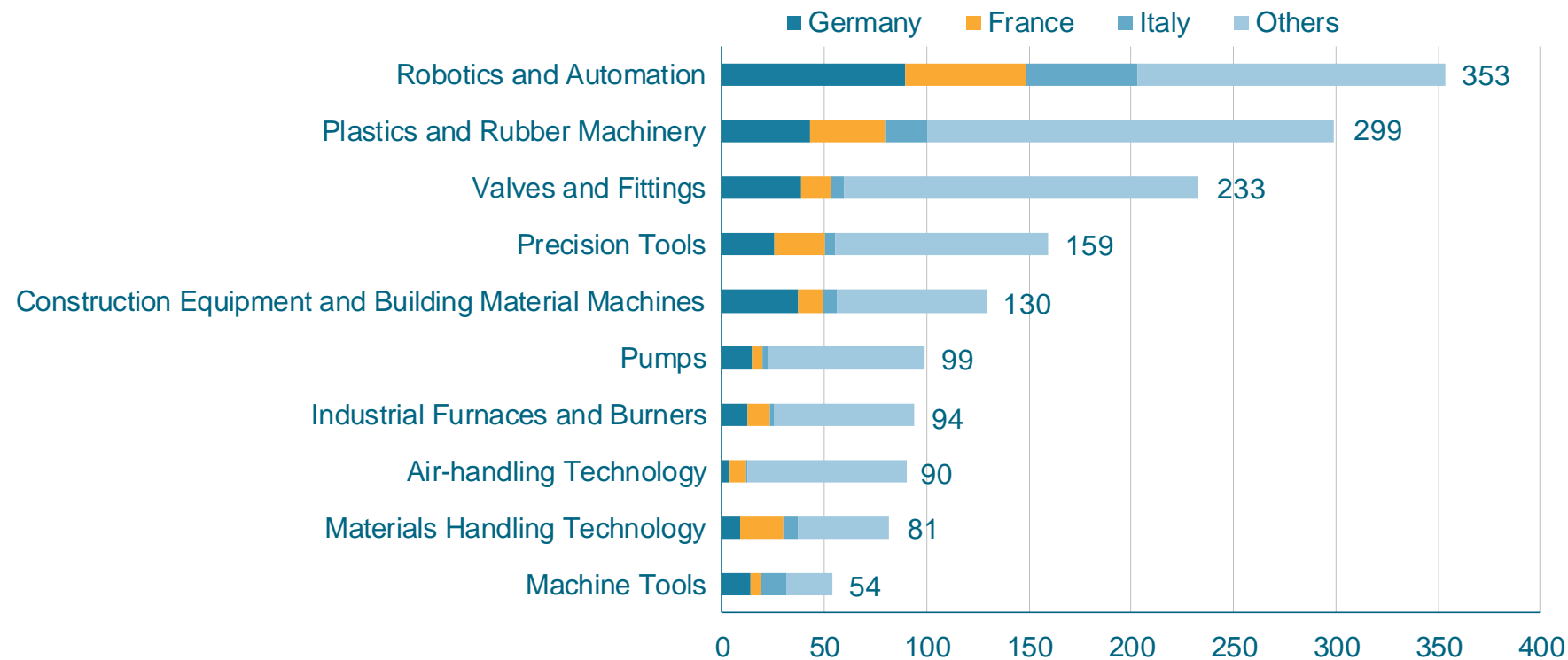
m EUR, 2023



Source: Eurostat, VDMA

# Luxembourg: Machinery exports by subsectors and countries

m EUR, 2023



Source: Eurostat, VDMA



# Netherlands: Machinery imports



## Machinery imports of Netherlands

Year	Total m EUR	Country shares in %					
		DE	CN	JP	US	BE	IT
2014	18,956	25.3	8.7	11.1	11.4	4.5	3.6
2015	20,169	24.3	8.4	11.1	12.2	4.7	3.4
2016	24,418	28.0	7.3	8.4	9.6	6.4	4.8
2017	26,207	27.7	7.5	8.2	8.9	6.2	4.7
2018	30,273	28.7	7.7	8.1	9.4	5.6	4.2
2019	32,476	27.3	8.0	8.5	9.0	5.8	4.4
2020	30,769	28.8	8.6	7.2	9.5	5.8	4.5
2021	35,819	28.8	10.5	7.7	8.7	5.7	4.7
2022	40,564	28.4	11.4	7.5	8.7	5.7	4.1
2023	41,591	31.8	9.7	7.9	7.3	5.5	4.4

# Belgium: Machinery imports



## Machinery imports of Belgium

Year	Total m EUR	Country shares in %					
		DE	CN	NL	US	FR	IT
2014	17,982	18.4	4.6	8.8	12.7	10.1	7.7
2015	17,296	18.4	5.5	9.1	10.9	10.2	7.5
2016	18,425	19.7	5.7	9.3	10.1	9.9	7.9
2017	19,931	20.4	5.7	8.8	10.3	9.9	7.9
2018	20,255	19.5	5.8	9.8	9.2	9.5	8.0
2019	21,180	18.2	7.0	11.1	9.1	8.9	7.6
2020	19,213	19.8	8.2	10.8	8.4	9.0	7.9
2021	22,755	18.5	10.3	10.3	7.7	8.9	8.6
2022	25,495	17.9	12.3	9.3	8.1	8.2	7.7
2023	25,773	18.0	12.1	9.1	8.8	8.3	7.2

# Luxembourg: Machinery imports

## Machinery imports of Luxembourg

Year	Total m EUR	Country shares in %					
		DE	BE	JP	FR	IT	US
2014	970	33.3	16.5	5.6	11.0	6.1	4.3
2015	1,031	32.3	15.6	6.7	10.5	6.8	4.8
2016	1,317	28.1	14.0	19.4	8.9	5.1	4.3
2017	1,487	25.9	13.5	22.4	8.2	5.8	4.2
2018	1,483	27.4	14.1	15.7	8.8	6.4	4.1
2019	1,583	25.8	15.5	19.2	8.8	5.0	4.1
2020	1,532	29.8	14.5	13.9	9.0	4.8	3.7
2021	1,611	29.2	15.5	11.9	9.4	5.1	3.8
2022	1,707	28.7	13.9	13.5	9.1	4.7	5.0
2023	1,604	29.8	13.4	11.4	8.8	5.7	4.8

Source: Eurostat, VDMA



## Information on market opportunities: VDMA Statistics Database

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» Publication and files

» Interactive data explorer

– International trade

– German Production figures

– VDMA New order and turnover statistics

– Leading indicators all EU-27 countries by industries

## Your contact.



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