



ECONOMICS AND STATISTICS

Current market situation in the Netherlands, Belgium and Luxembourg

Data as on October, 30th 2025 available

2025/10/30 - ANKE UHLIG

ADVANCING EUROPE'S MACHINERY INDUSTRY



Chart pack BeNeLux

1

MACHINERY PRODUCTION

4

TRADE LINKS

2

BUSINESS CLIMATE SURVEY
RESULTS

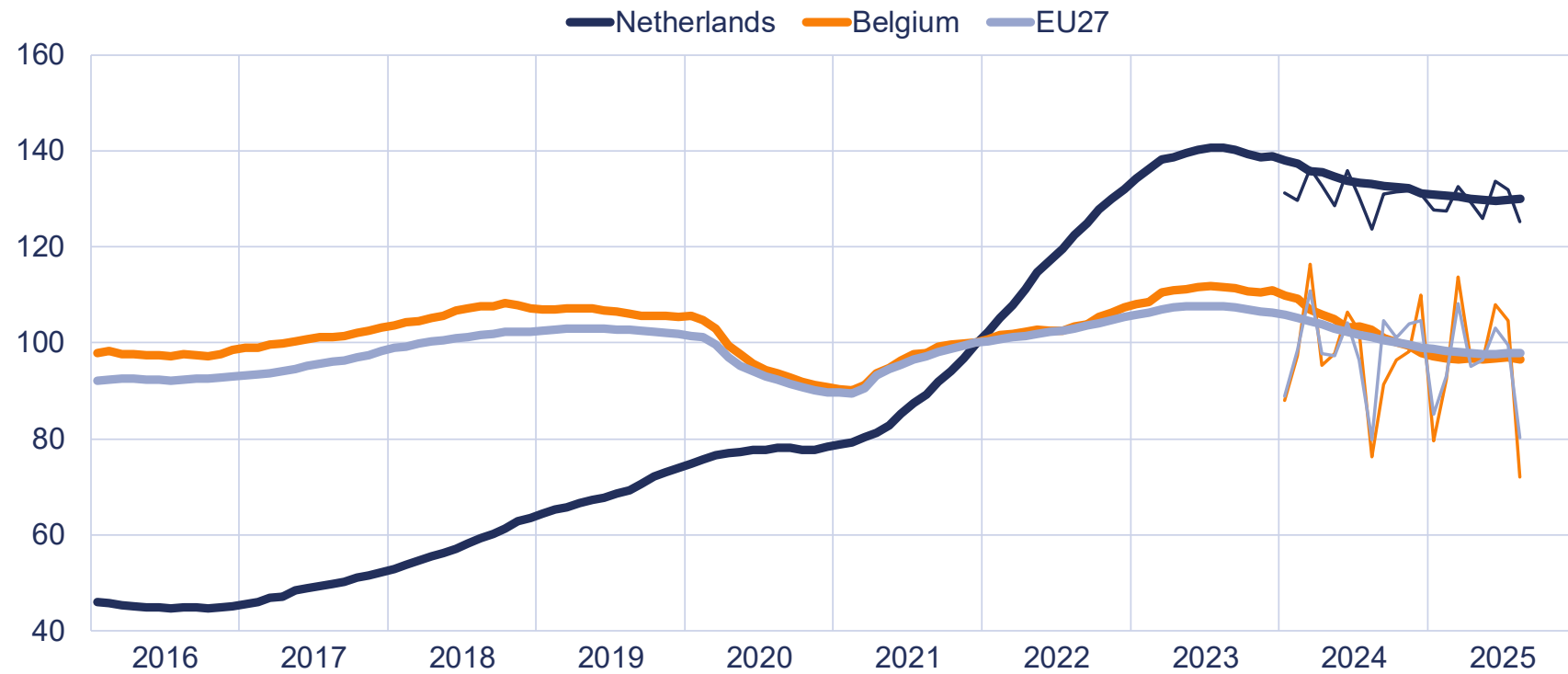
3

MACHINERY TURNOVER INCL.
FORECAST

1 Machinery Production

Machinery production

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

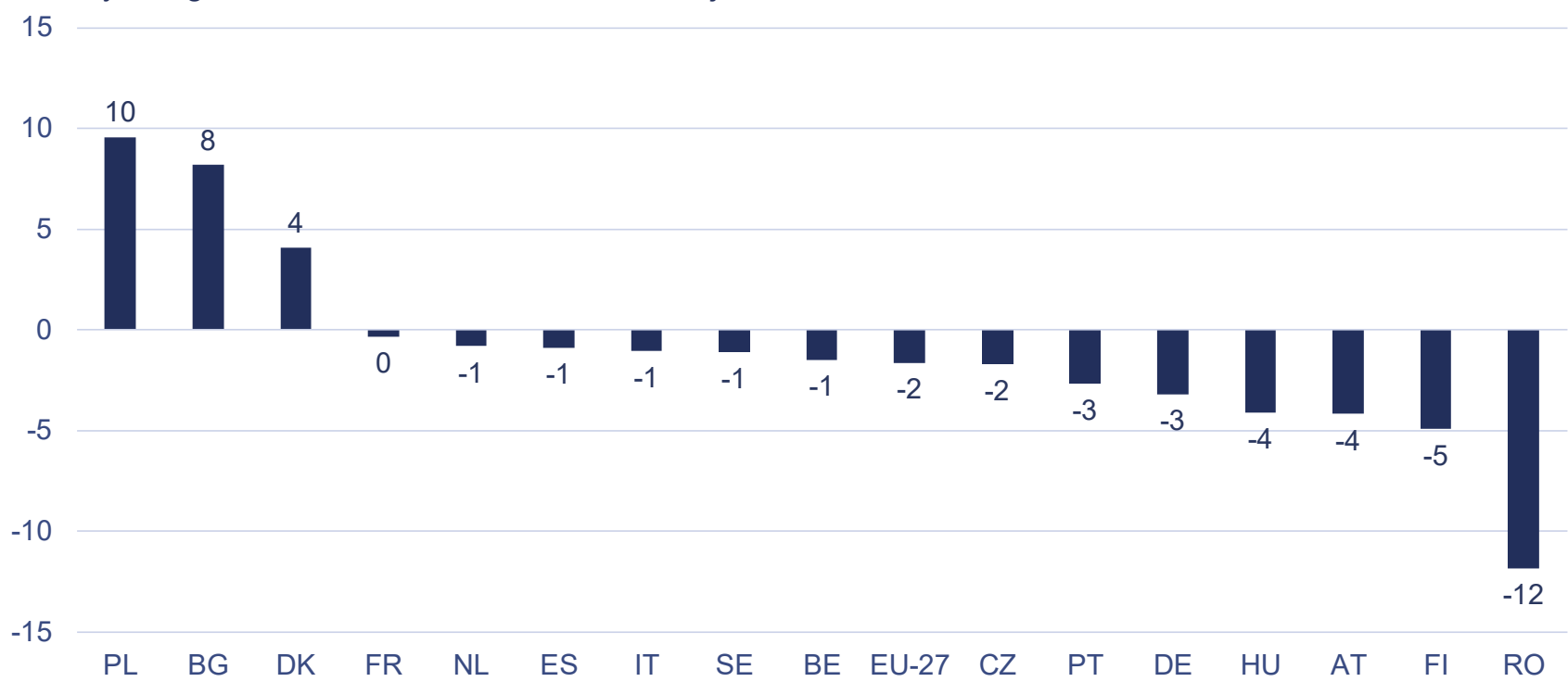


*) NACE rev. 2 code 28.

Source: Eurostat, Macrobond, VDMA

EU-27: Production in machinery and equipment manufacturing*

January - August 2025/2024, %, real, calendar adjusted



*) NACE rev. 2 chapter 28.

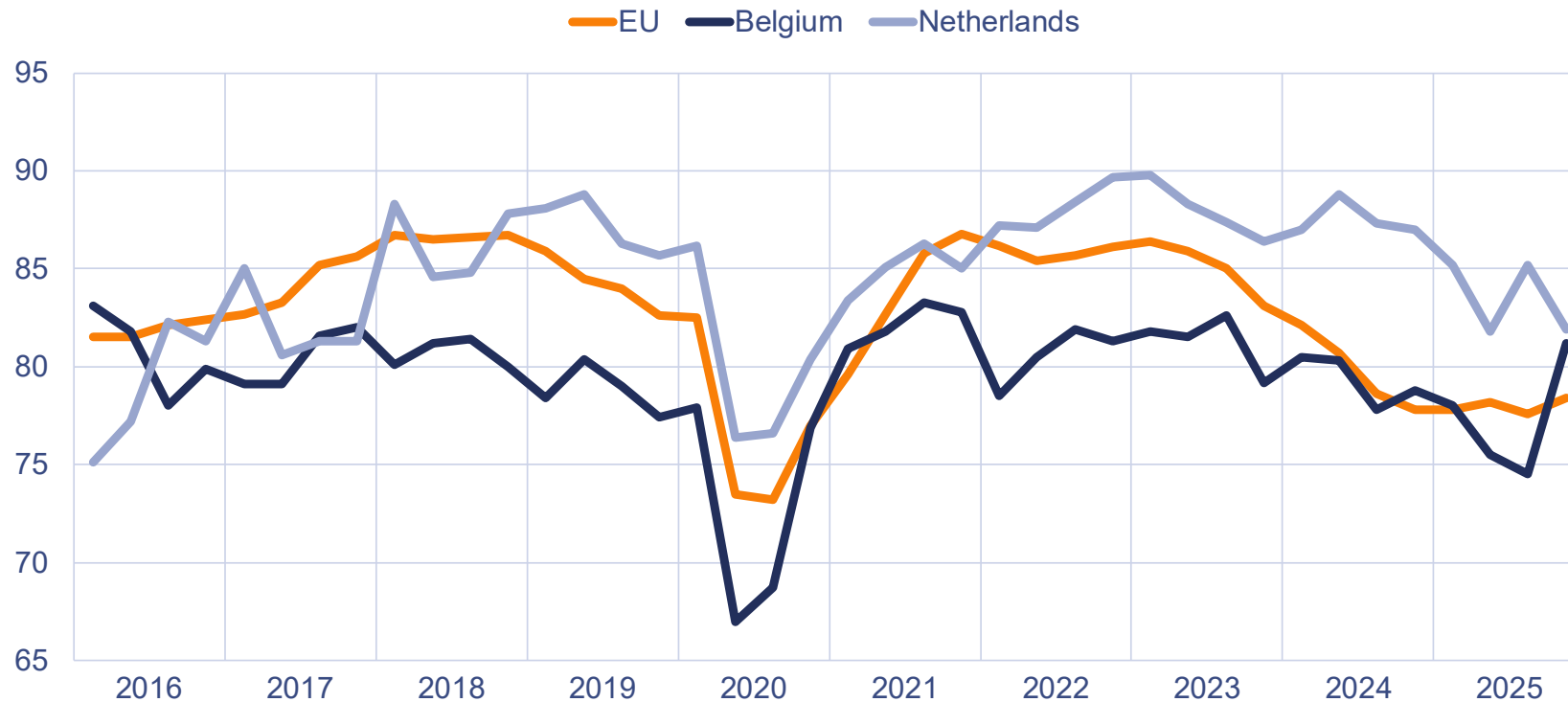
Source: Eurostat, Macrobond, VDMA

Business Climate Survey Results

A large, stylized orange number '2' is positioned behind the text, spanning across the words 'Business' and 'Climate' on the top line, and 'Survey' and 'Results' on the bottom line.

Capacity utilization in machinery and equipment manufacturing

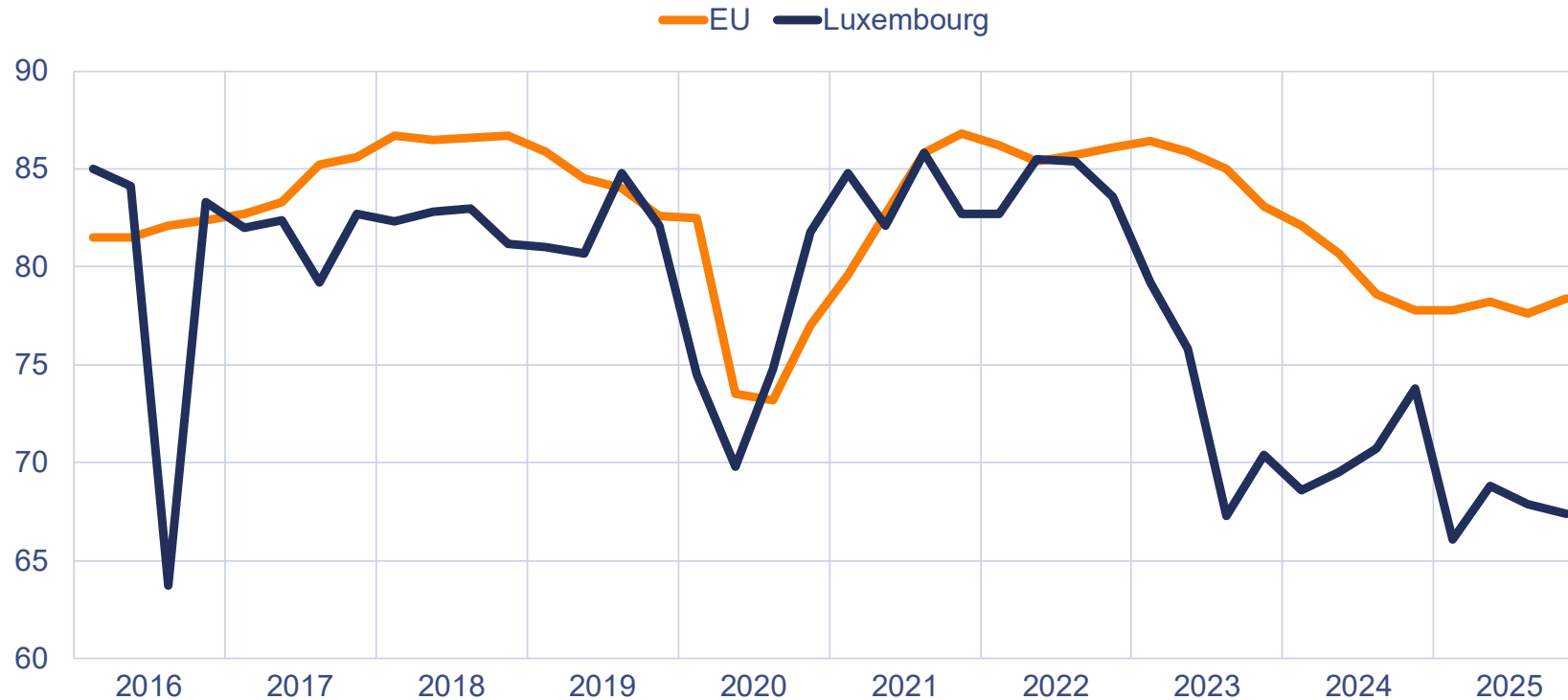
In percent of full capacity level of output



Source: EU DG ECFIN, Macrobond, VDMA

Luxembourg: Capacity utilization in machinery and equipment manufacturing

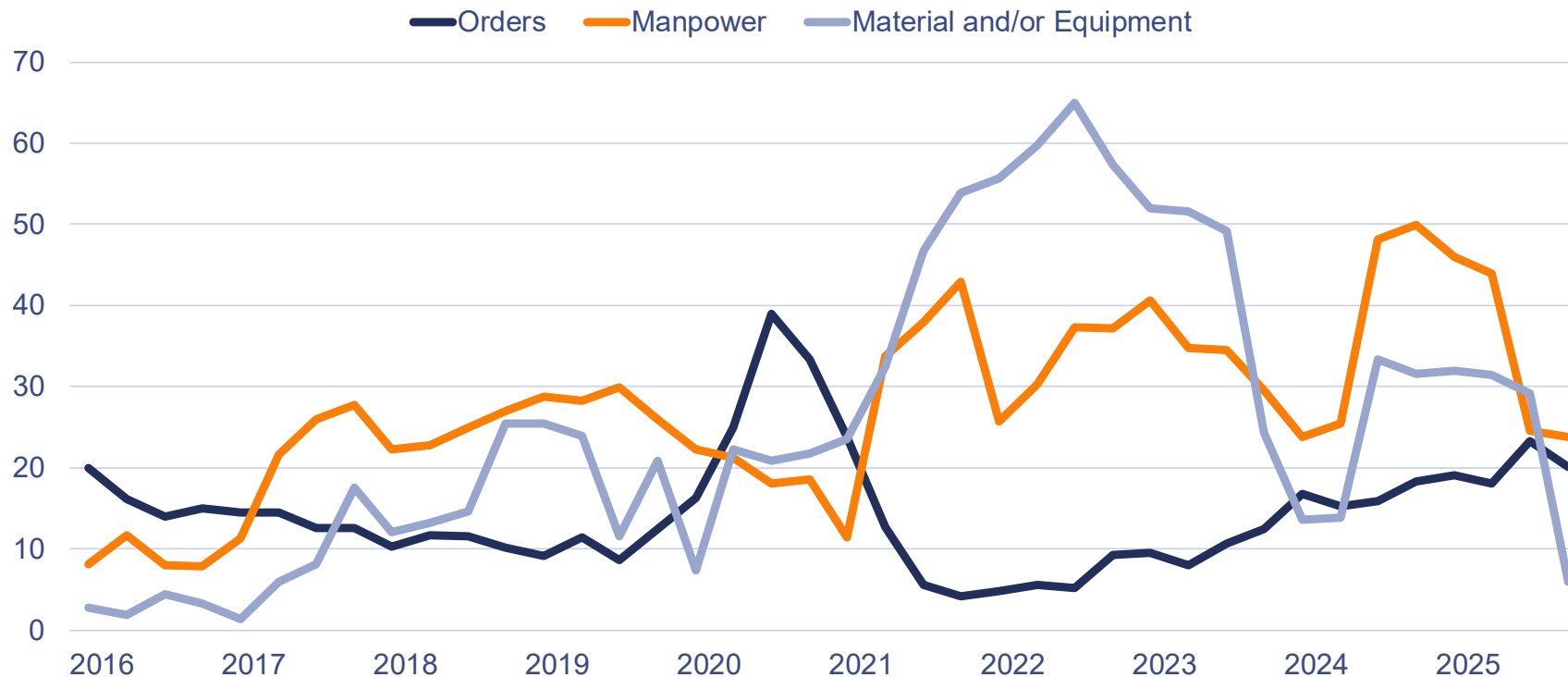
In percent of full capacity level of output



Source: EU DG ECFIN, Macrobond, VDMA

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

Shares in per cent

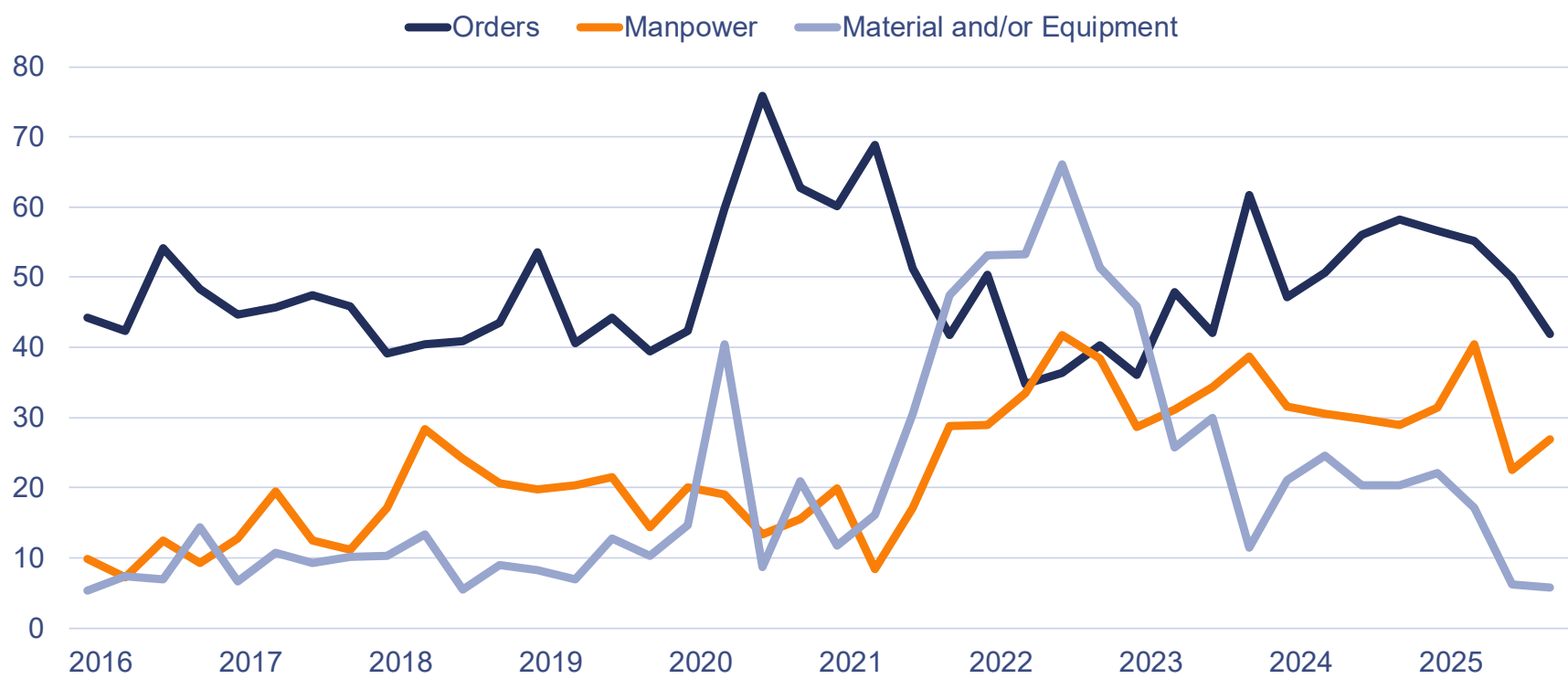


Source: European Commission, Macrobond, VDMA

Economics and Statistics

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

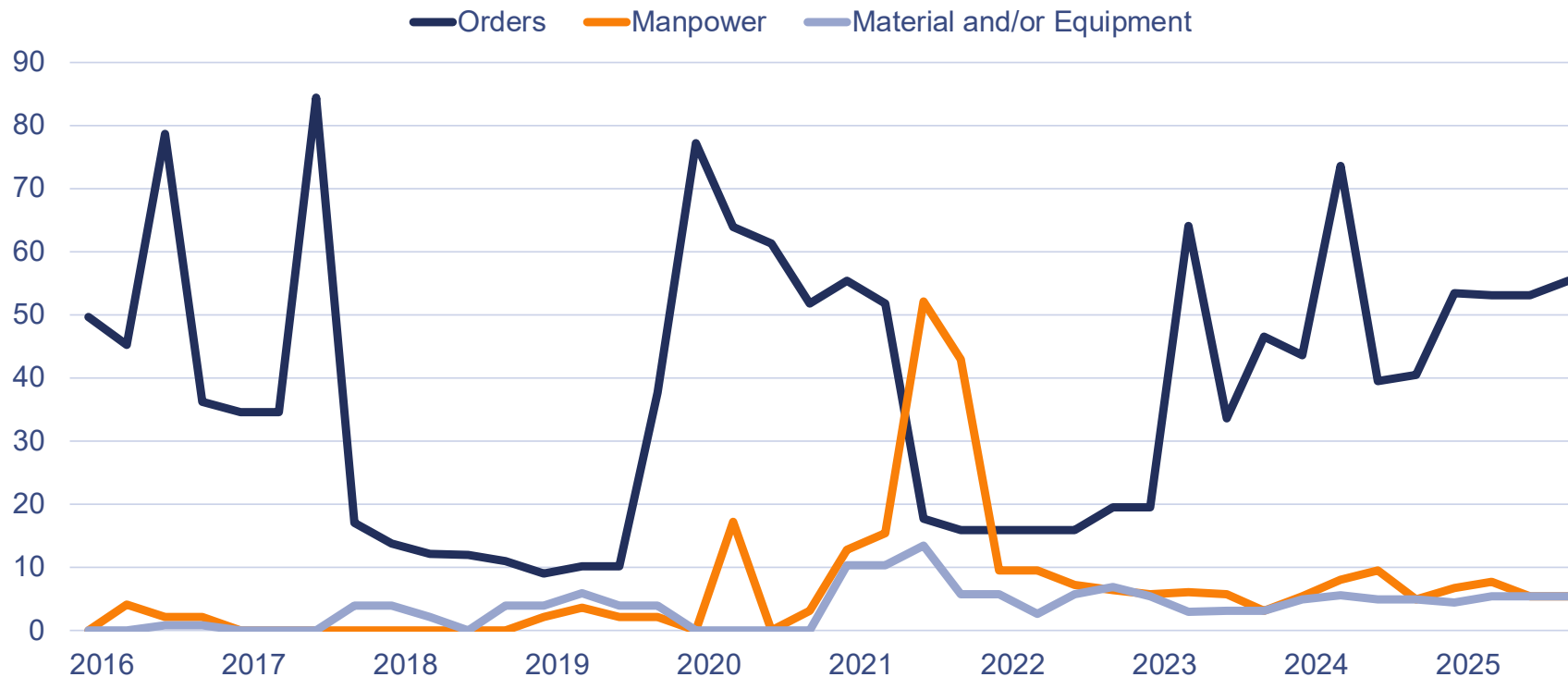
Shares in per cent



Source: European Commission, Macrobond, VDMA

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

Shares in per cent



Source: European Commission, 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

Luxembourg: Business climate in machinery and equipment manufacturing

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

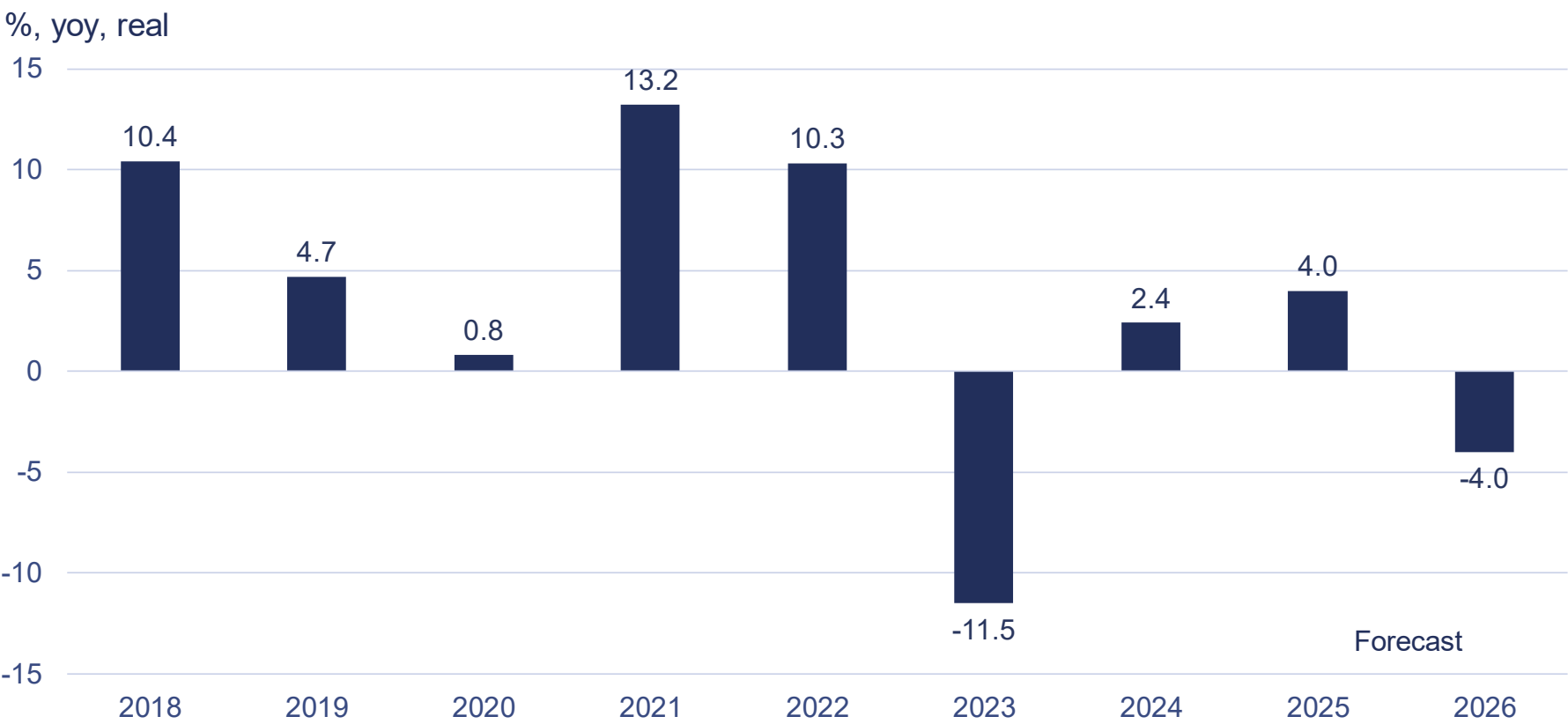


Check this website:

[VDMA Statistics Database](#)

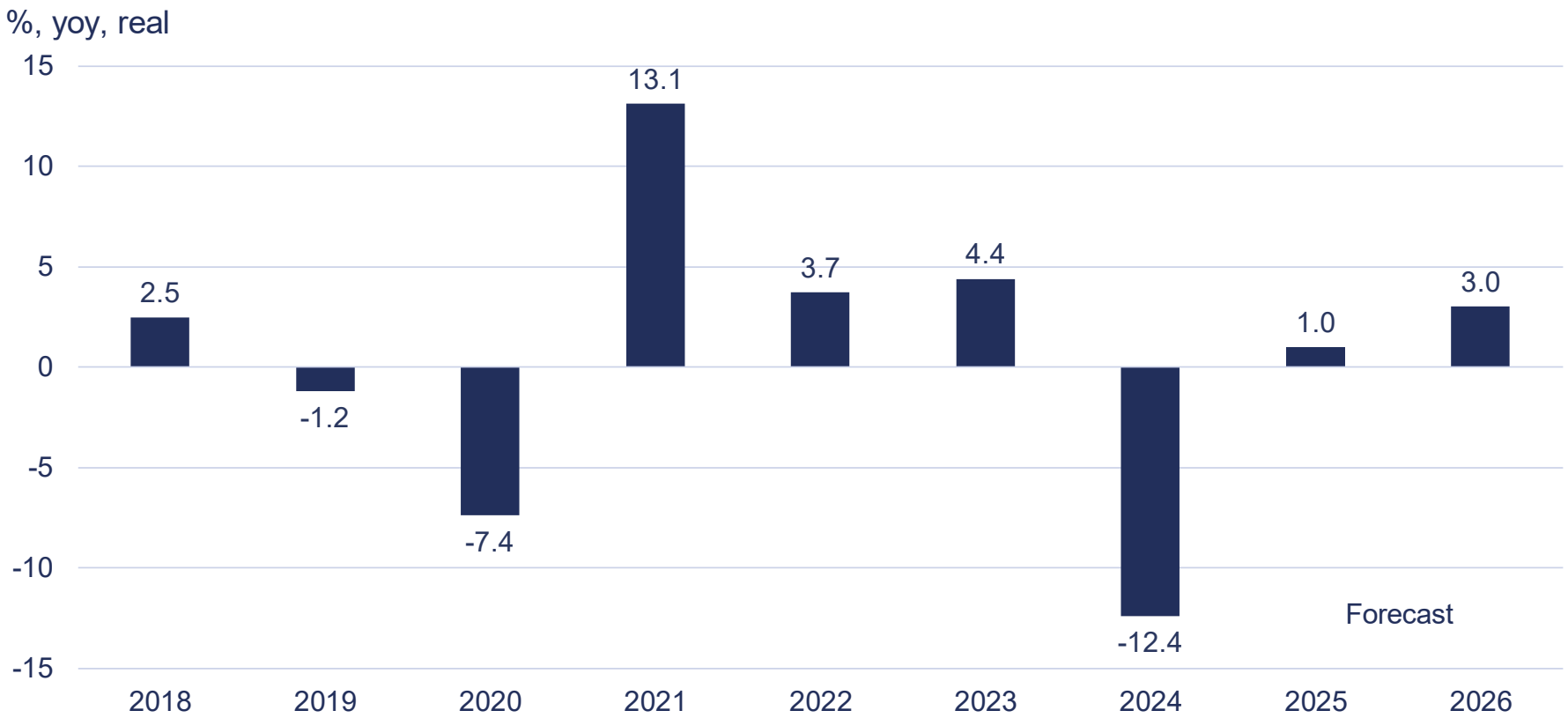
Machinery 3 Turnover incl. Forecast

Netherlands: Development of machinery turnover



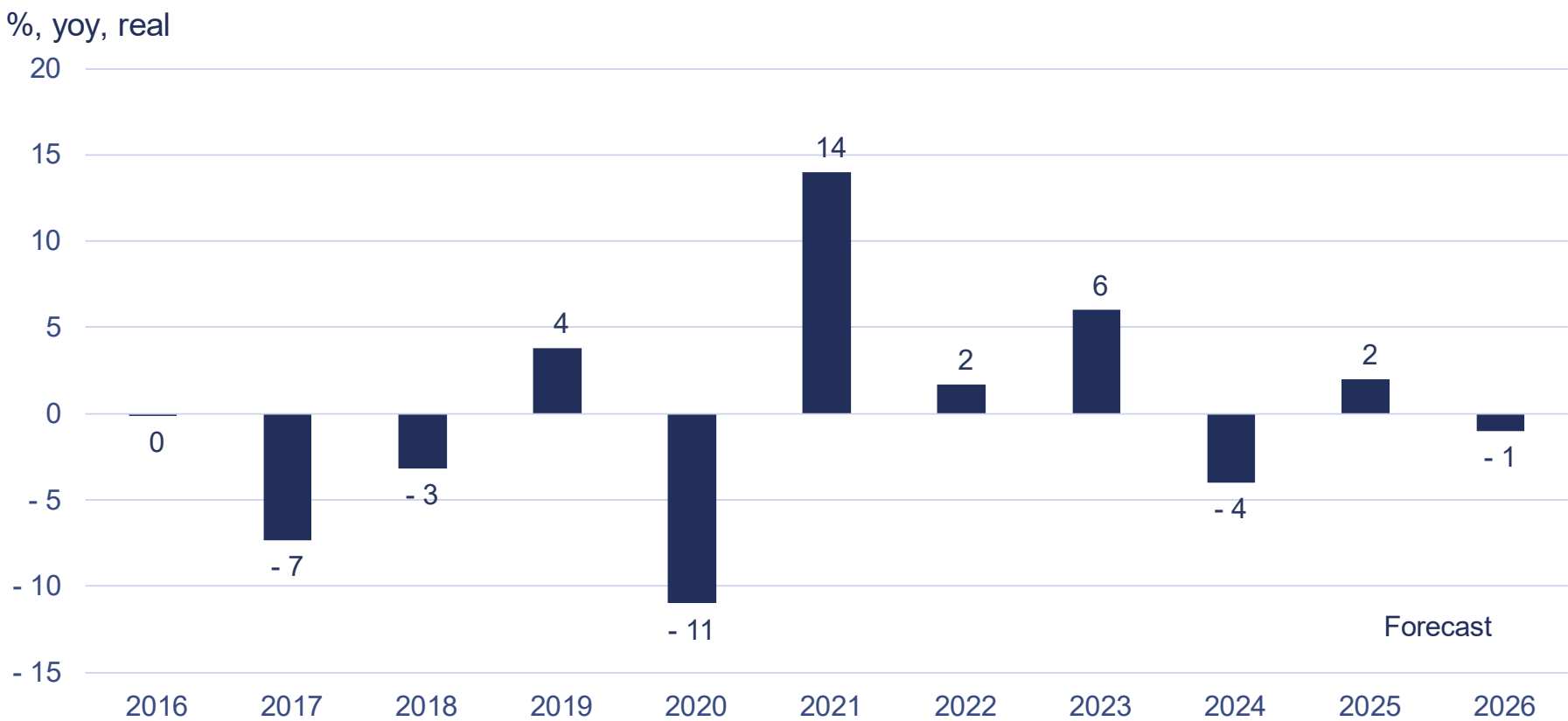
Source: Eurostat, VDMA

Belgium: Development of machinery turnover



Source: Eurostat, VDMA

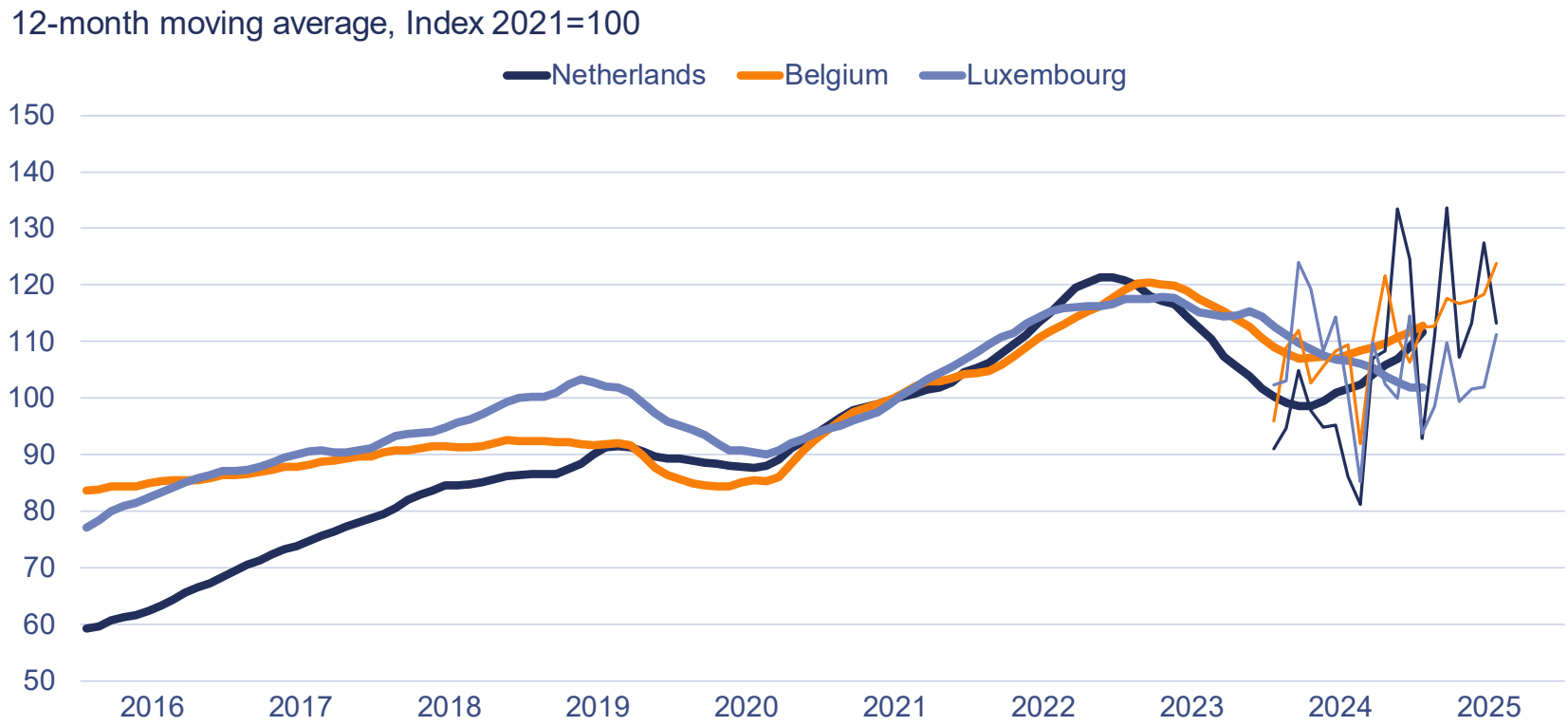
Luxembourg: Development of machinery turnover



Source: Oxford Economics, VDMA

Trade4Links

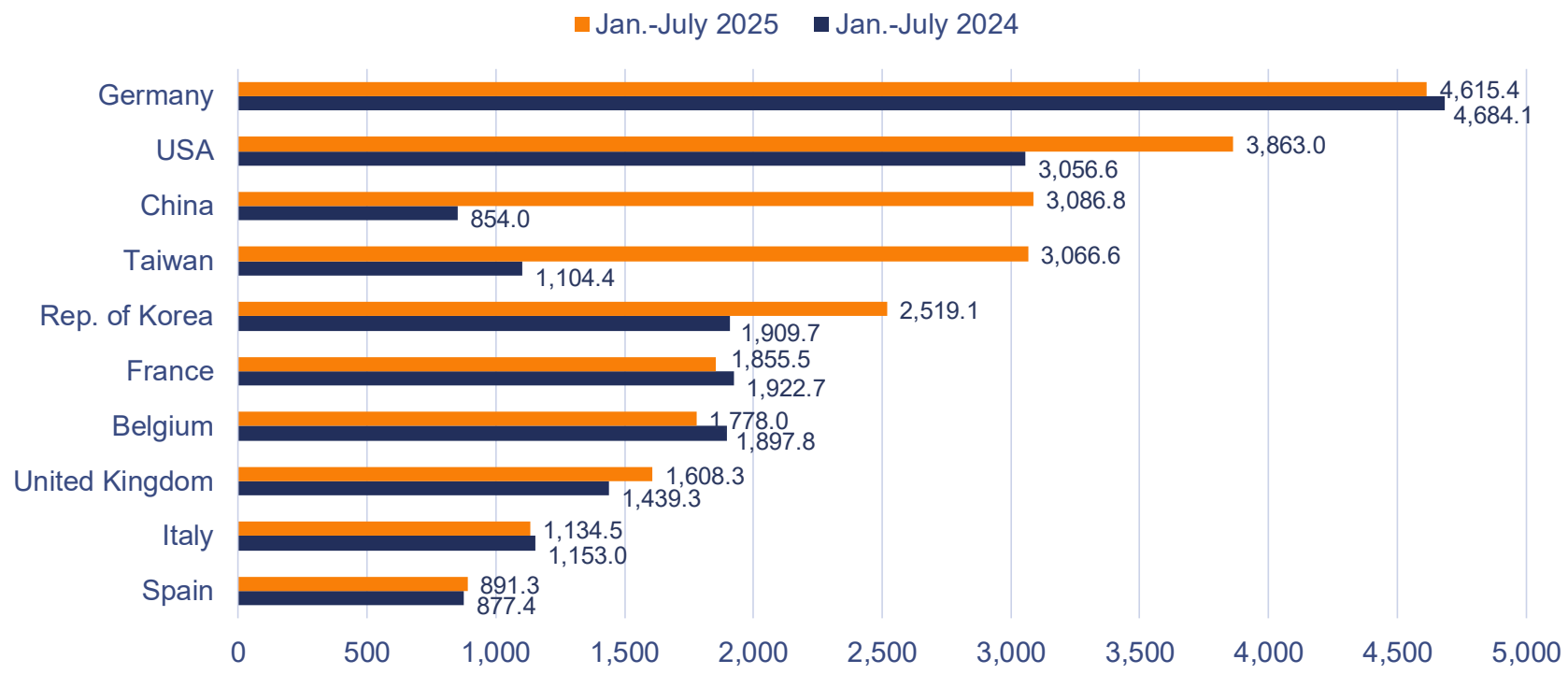
Machinery exports of the Netherlands, Belgium and Luxembourg



Source: Eurostat, VDMA

Netherlands: Machinery exports TOP 10 countries

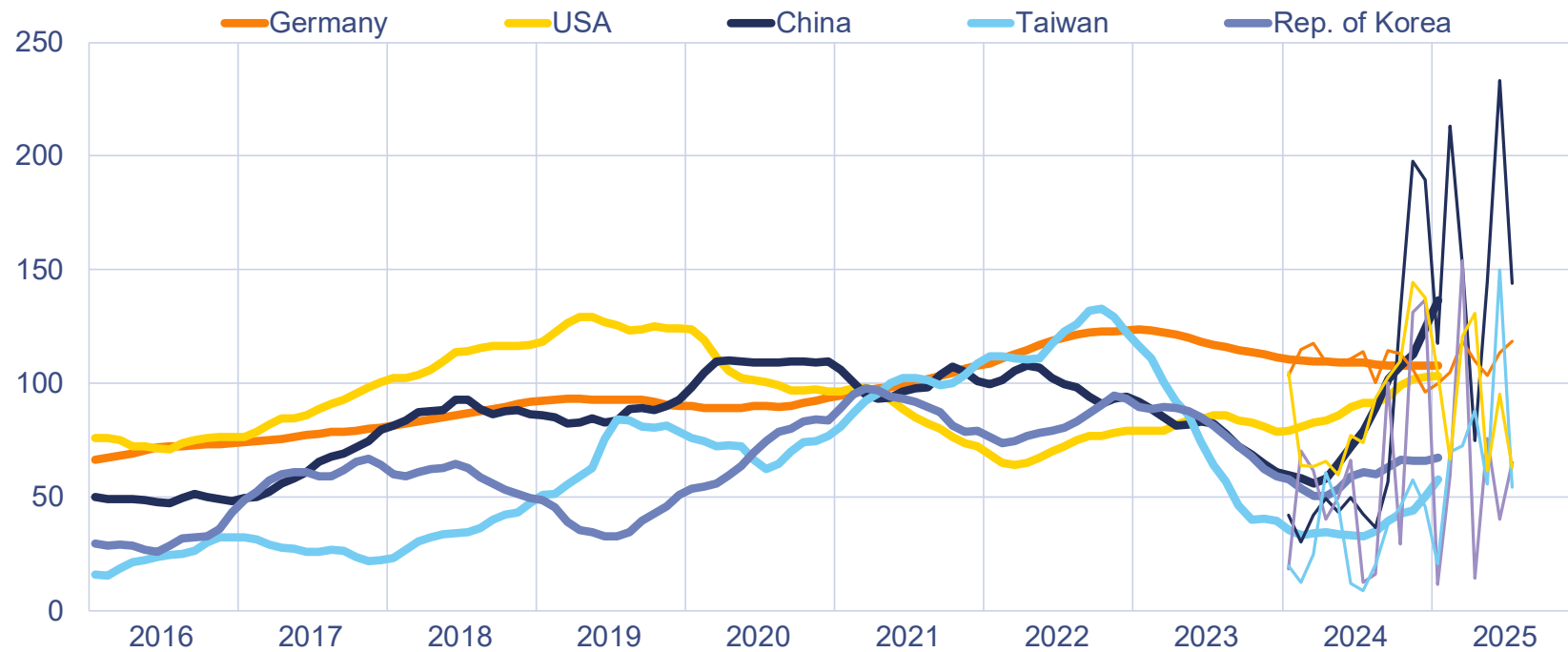
m EUR



Source: Eurostat, VDMA

Netherlands: Machinery exports in the Top-5 export countries

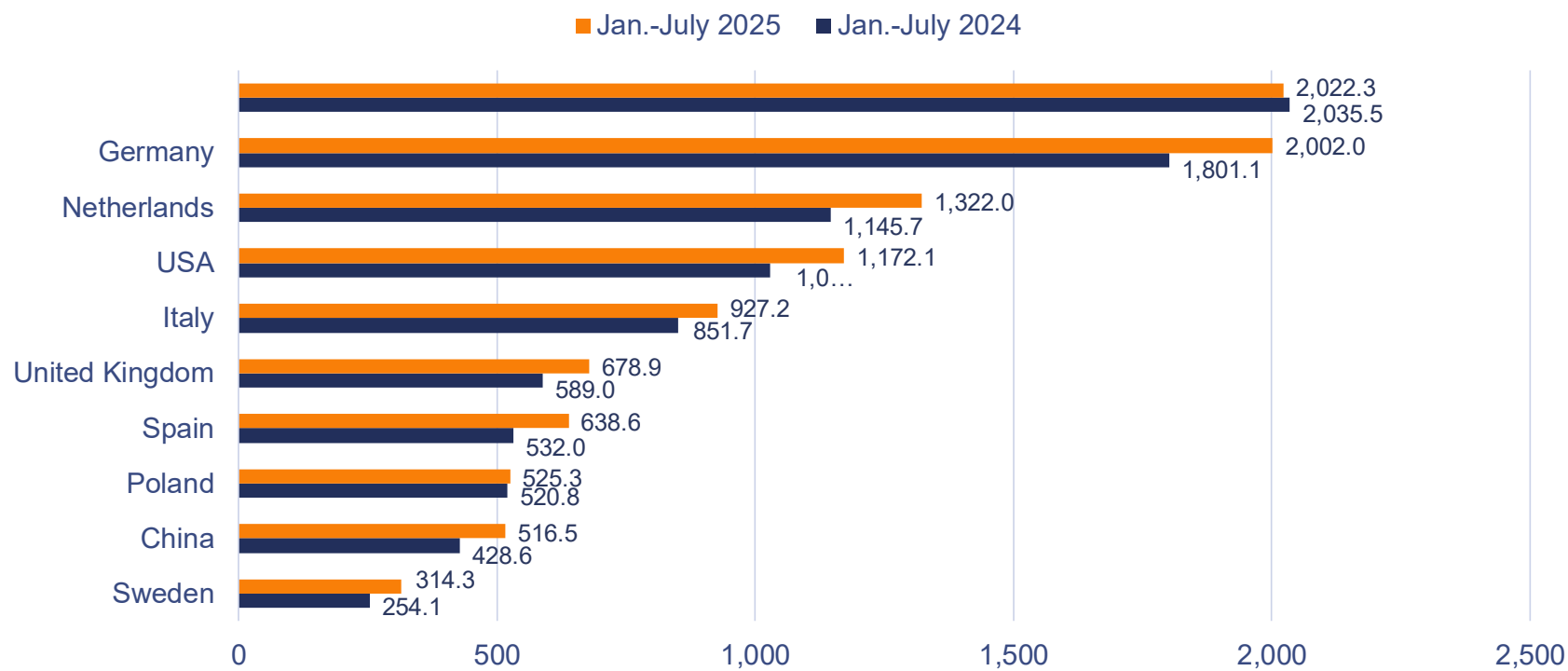
12-month moving average, Index 2021=100



Source: Eurostat, VDMA

Belgium: Machinery exports TOP 10 countries

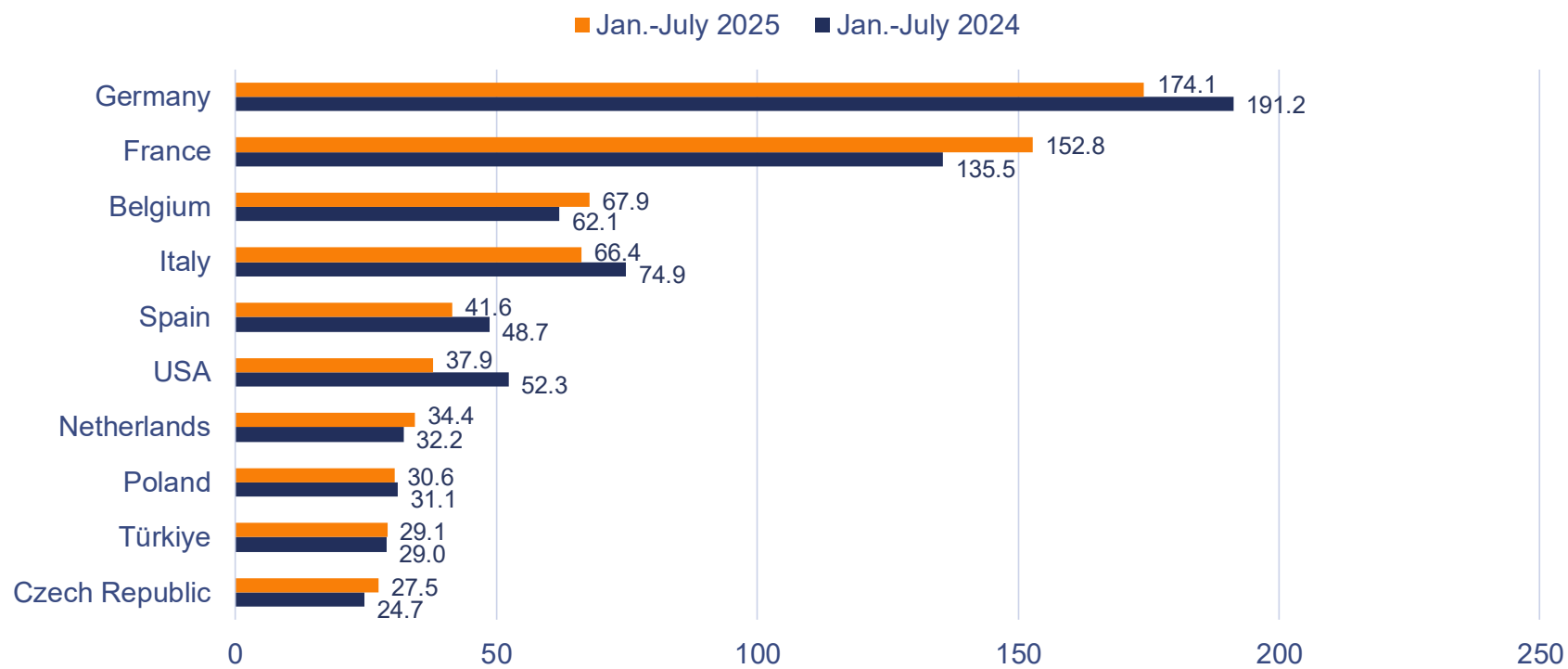
m EUR



Source: Eurostat, VDMA

Luxembourg: Machinery exports TOP 10 countries

m EUR

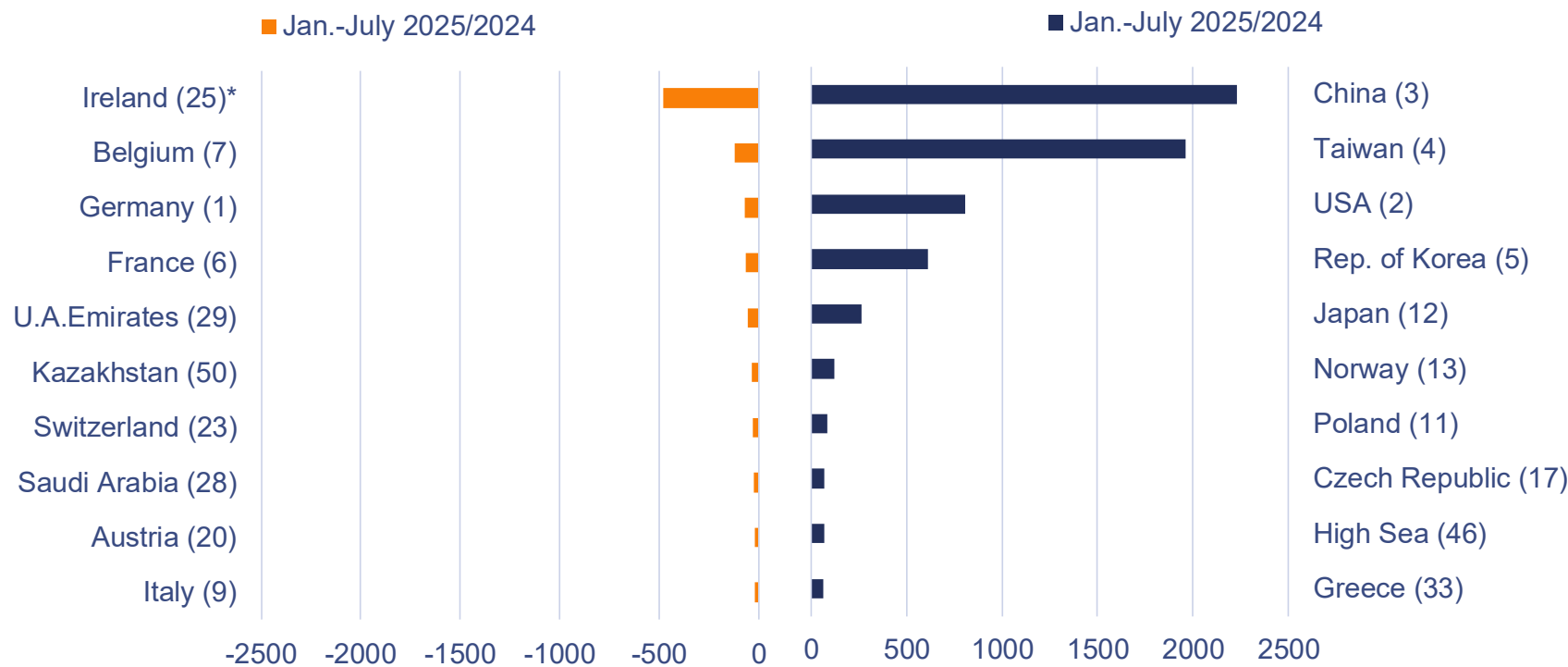


Source: Eurostat, VDMA

Netherlands: Machinery exports by countries

Absolutely highest decreases/increases

In m EUR



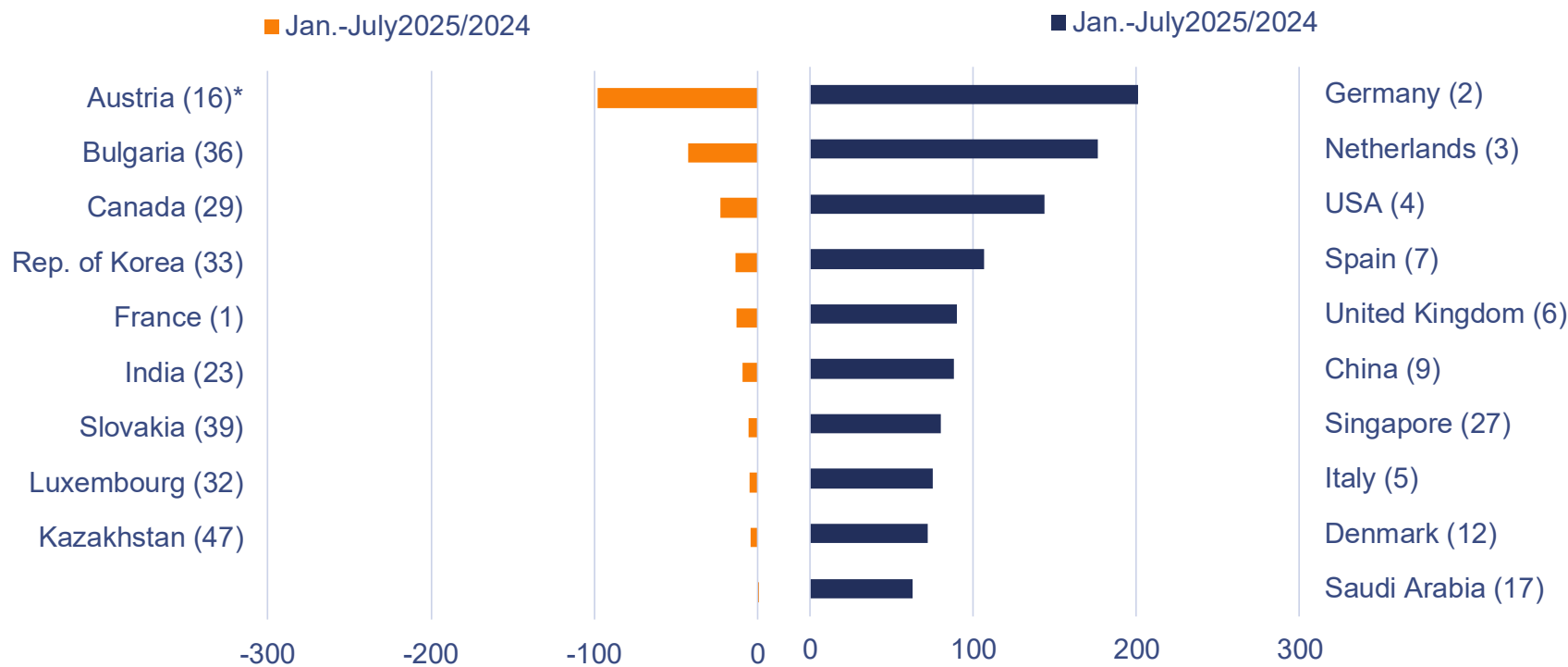
*) Rank of country within the top 50 destinations of Netherlands machinery exports.

Source: Eurostat, VDMA

Belgium: Machinery exports by countries

Absolutely highest decreases/increases

In m EUR



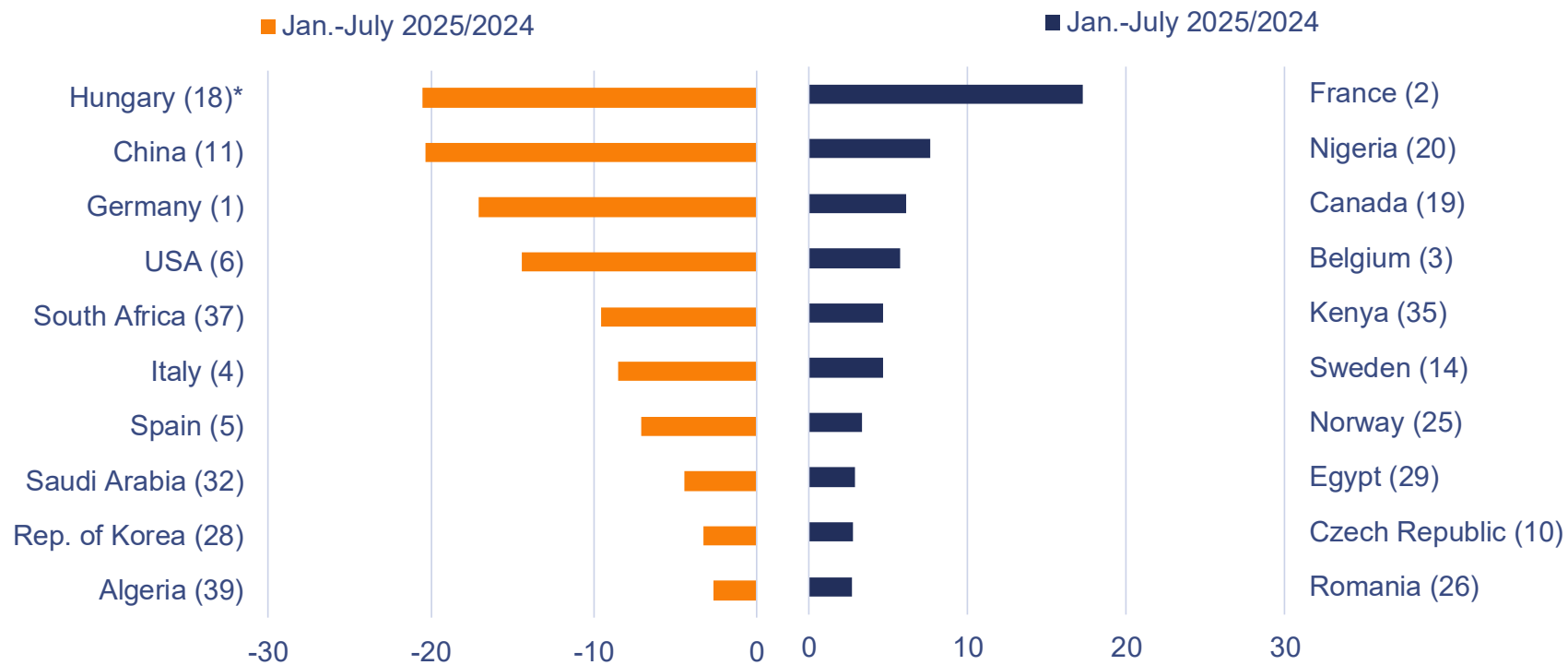
*) Rank of country within the top 50 destinations of Belgium machinery exports.

Source: Eurostat, VDMA

Luxembourg: Machinery exports by countries

Absolutely highest decreases/increases

In m EUR

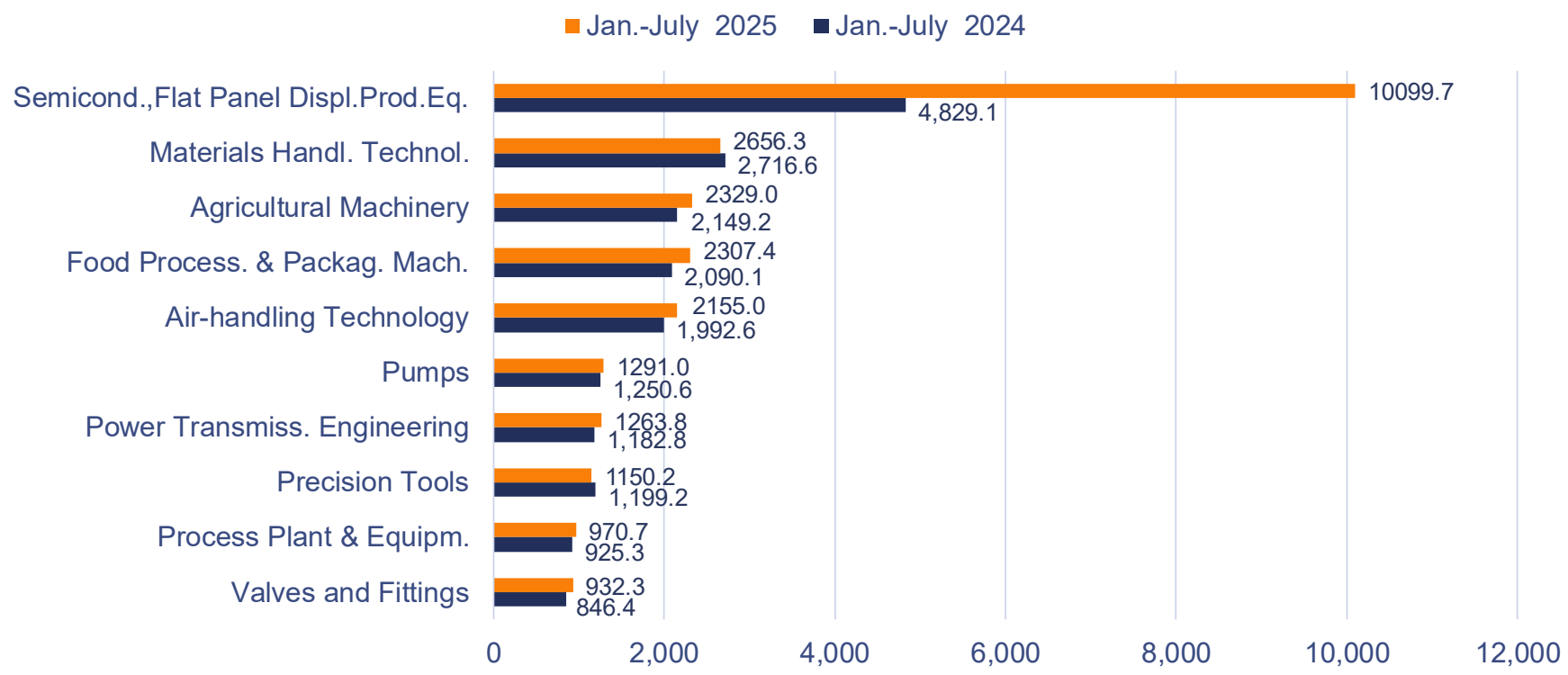


*) Rank of country within the top 50 destinations of Luxembourg machinery exports.

Source: Eurostat, VDMA

Netherlands: Machinery exports for Top-10 Sectors

m EUR

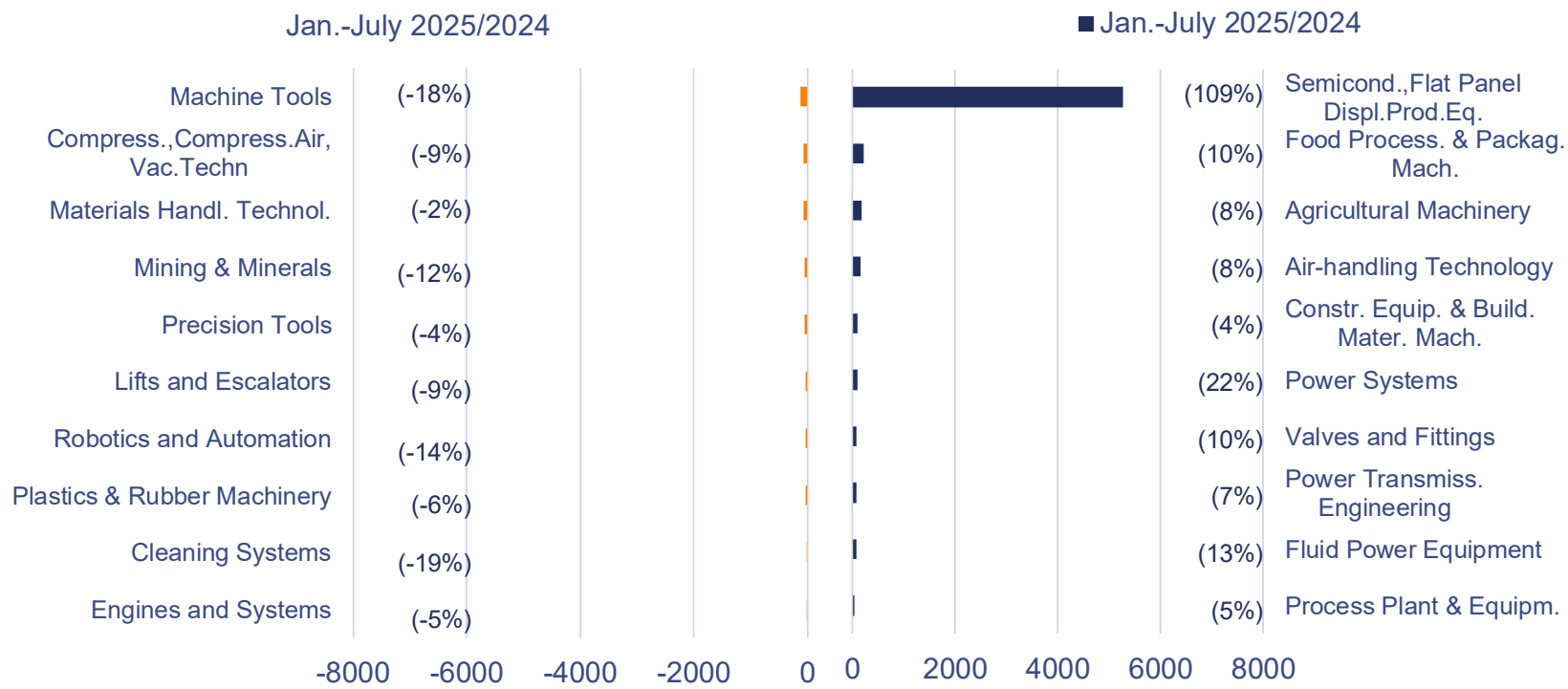


Source: Eurostat, VDMA

Netherlands: Machinery by sectors

Absolutely highest decreases/increases

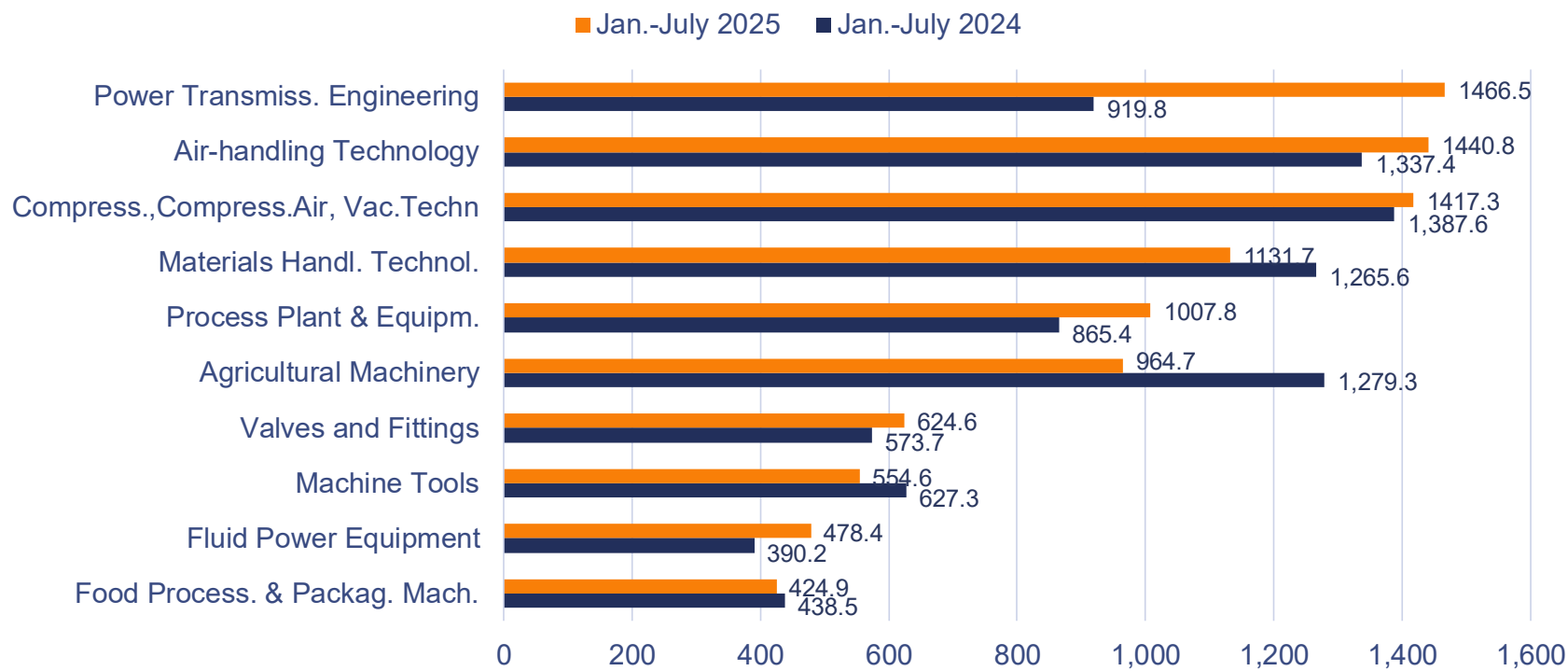
Absolutely highest decreases/increases in m Euro (Change to previous year in %)



Source: Eurostat, VDMA

Belgium: Machinery exports for Top-10 Sectors

m EUR

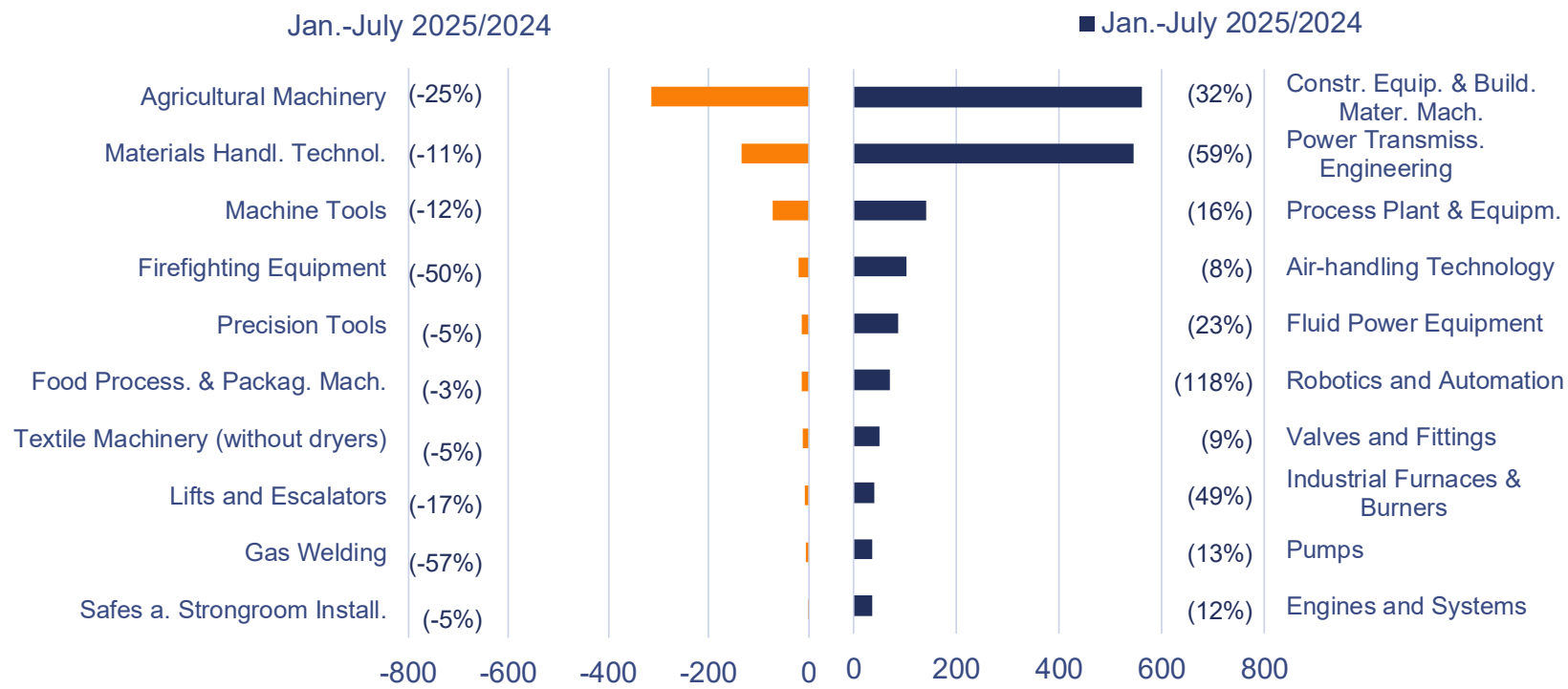


Source: Eurostat, VDMA

Belgium: Machinery by sectors

Absolutely highest decreases/increases

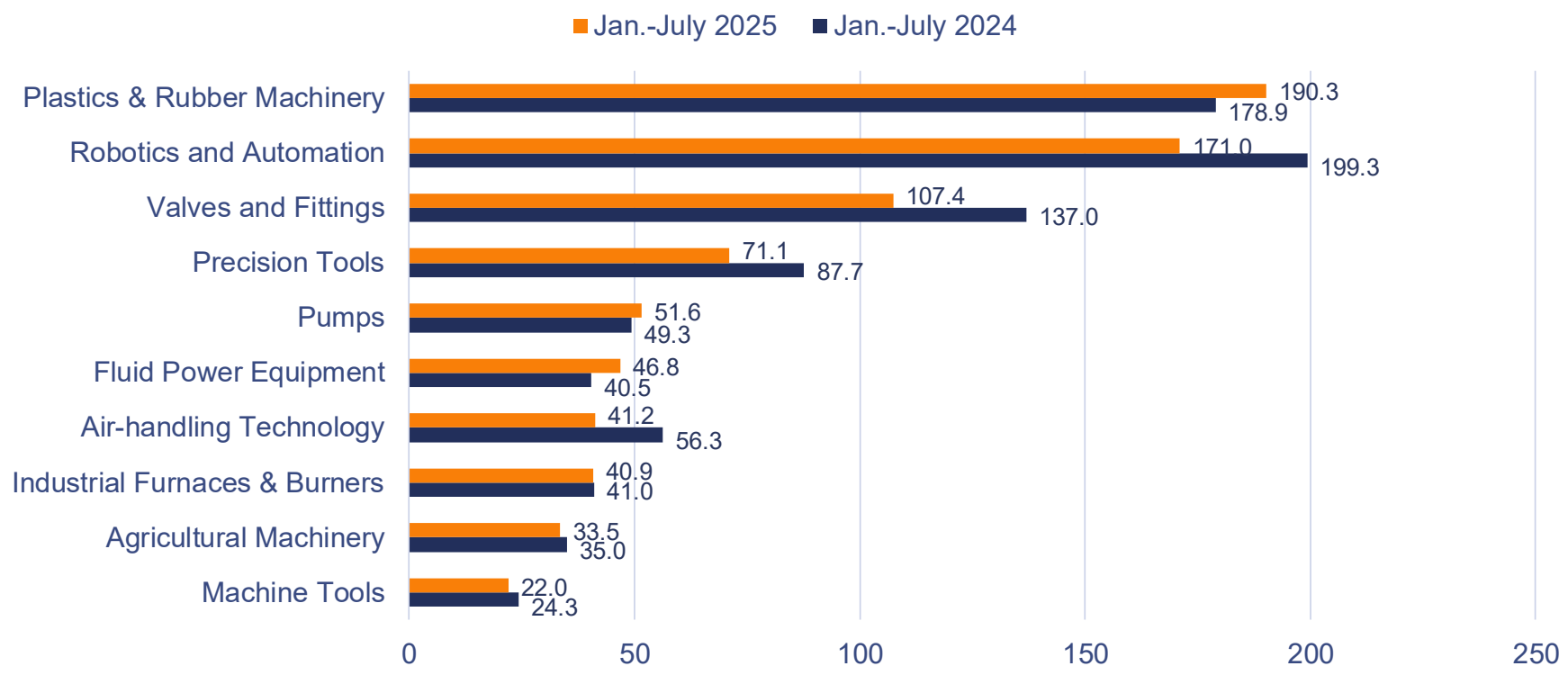
Absolutely highest decreases/increases in m Euro (Change to previous year in %)



Source: Eurostat, VDMA

Luxembourg: Machinery exports for Top-10 Sectors

m EUR

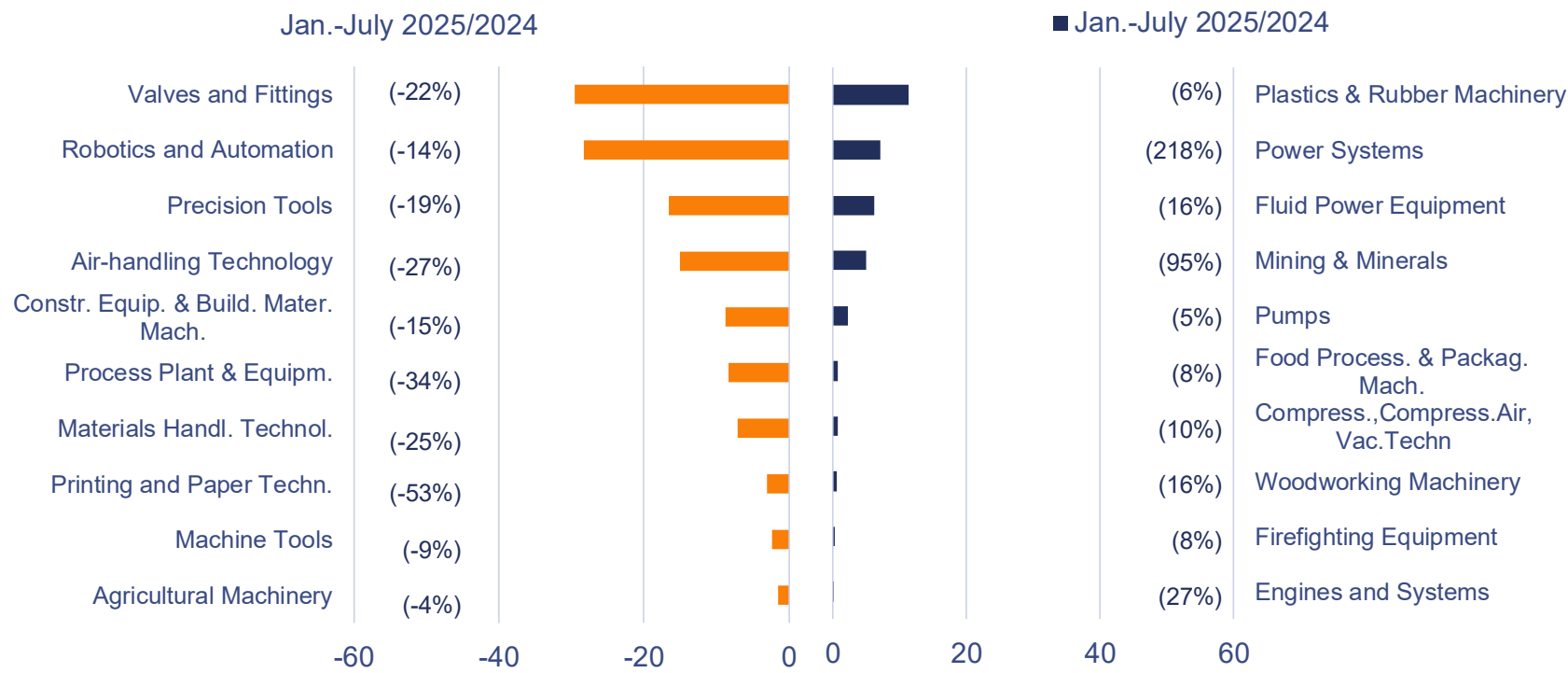


Source: Eurostat, VDMA

Luxembourg: Machinery by sectors

Absolutely highest decreases/increases

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



Source: Eurostat, VDMA

Netherlands: Machinery exports

Machinery exports of Netherlands

Year	Total	Country shares in %					
	m EUR	DE	US	KR	FR	BE	CN
2015	30,595	13.9	11.2	6.8	5.5	4.2	5.1
2016	33,635	15.5	8.5	4.4	6.3	6.3	4.9
2017	39,707	14.0	9.1	8.6	6.1	5.7	5.4
2018	45,448	13.7	10.3	8.2	6.1	5.3	7.2
2019	48,899	13.6	10.7	3.8	6.2	6.8	5.7
2020	47,024	13.9	8.9	8.7	5.5	7.6	7.9
2021	53,659	13.4	7.7	10.7	5.7	5.5	6.4
2022	61,484	14.0	8.4	9.3	5.6	4.9	5.6
2023	60,566	14.0	10.0	9.9	6.2	5.3	4.7
2024	54,498	14.4	12.1	8.1	5.8	5.8	4.8

Source: Eurostat, VDMA

Belgium: Machinery exports

Machinery exports of Belgium

Year	Total	Country shares in %					
	m EUR	FR	DE	NL	US	IT	GB
2015	19,351	13.7	12.5	7.2	6.5	5.5	6.0
2016	19,827	13.6	12.6	6.9	6.6	5.7	5.4
2017	20,515	13.9	12.0	6.9	6.8	5.8	5.3
2018	21,317	13.8	12.6	7.3	6.9	5.9	5.9
2019	21,402	14.9	12.5	8.0	6.7	6.0	5.9
2020	19,994	15.4	12.8	8.0	6.2	5.6	5.8
2021	23,348	17.6	12.8	7.5	6.2	6.7	4.0
2022	25,991	17.0	13.3	8.4	6.3	6.9	3.7
2023	27,625	14.9	13.2	8.4	6.8	6.8	3.8
2024	24,962	13.5	12.1	7.8	7.3	6.0	4.3

Source: Eurostat, VDMA

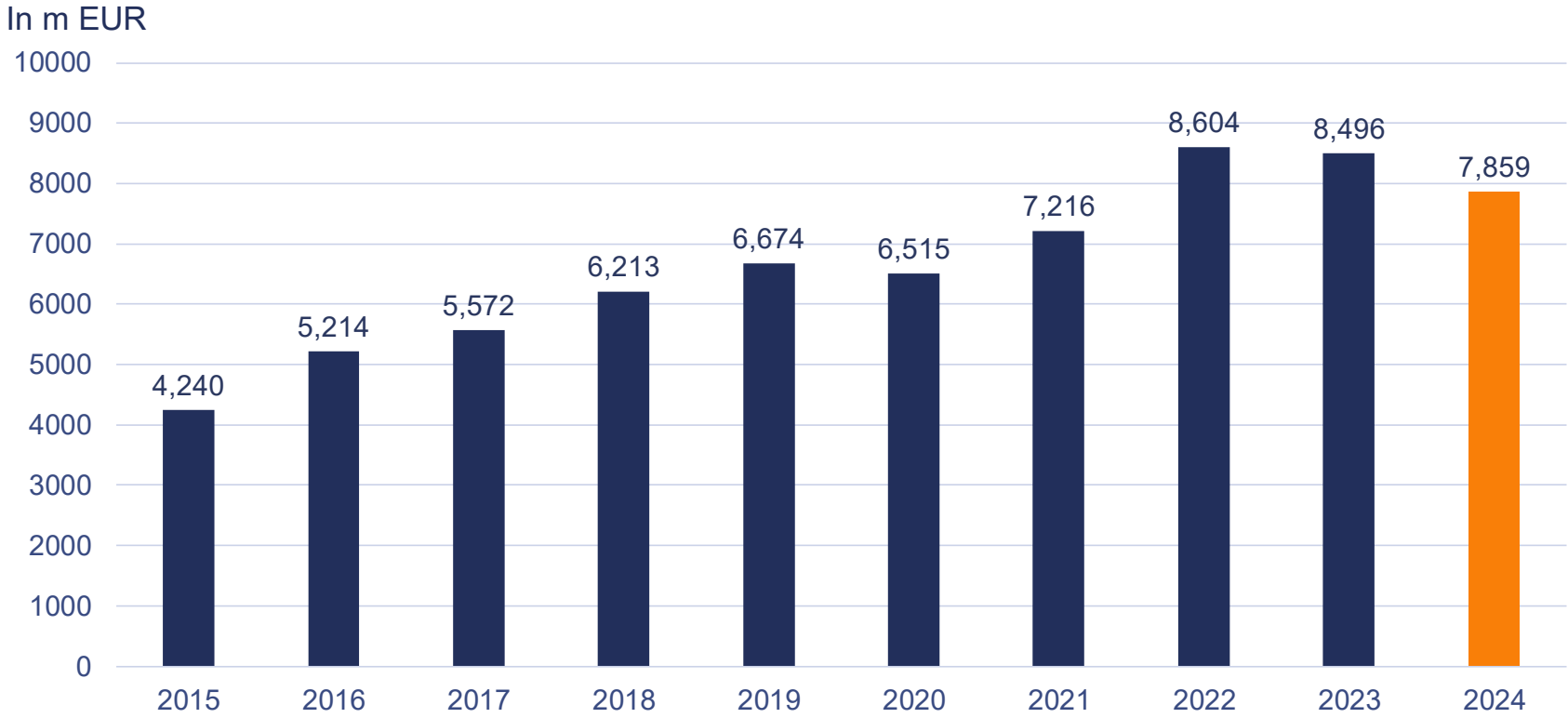
Luxembourg: Machinery exports

Machinery exports of Luxembourg

Year	Total	Country shares in %					
	m EUR	DE	FR	IT	BE	US	ES
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	1,982	18.9	13.1	6.7	5.9	4.8	3.3
2024	1,835	17.6	12.3	6.5	5.8	4.3	3.8

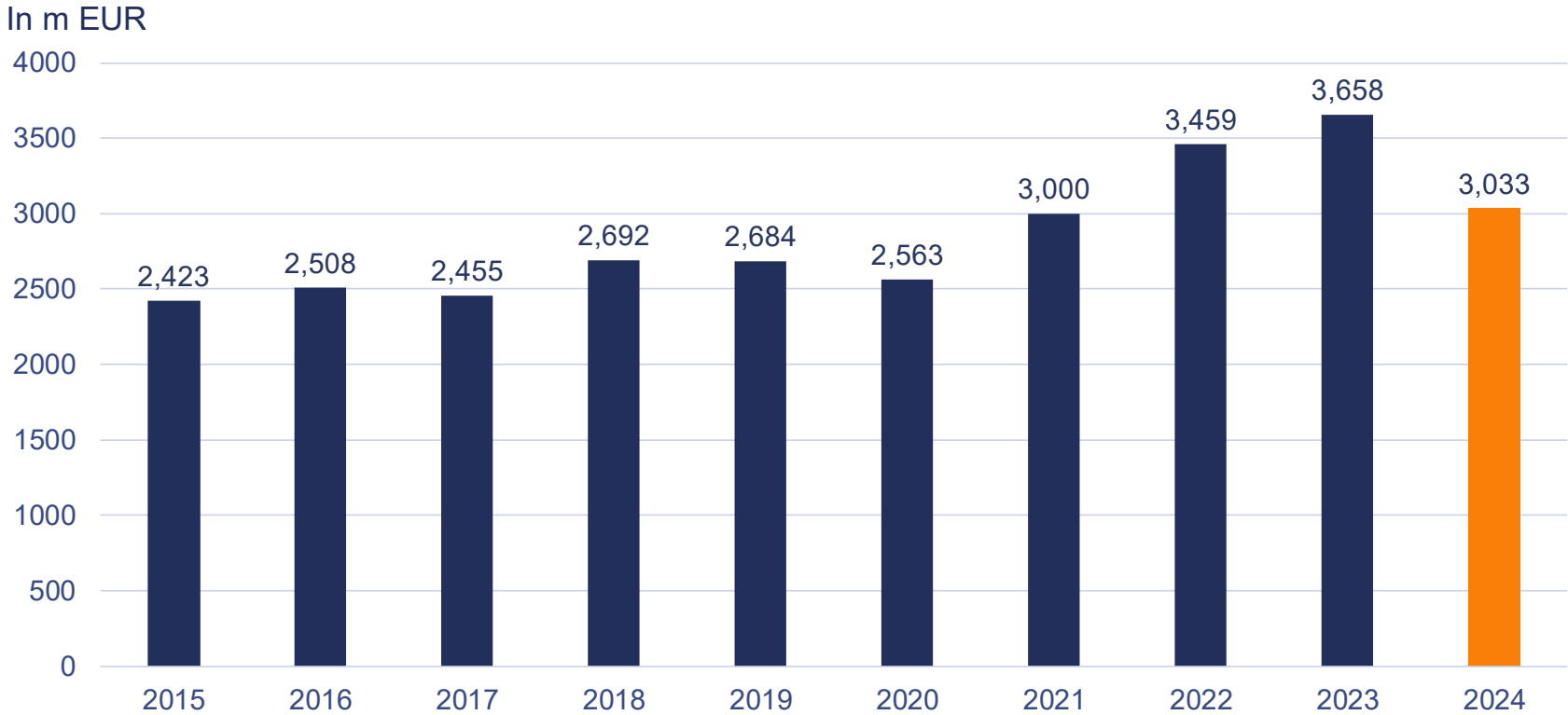
Source: Eurostat, VDMA

Netherlands: Machinery exports to Germany



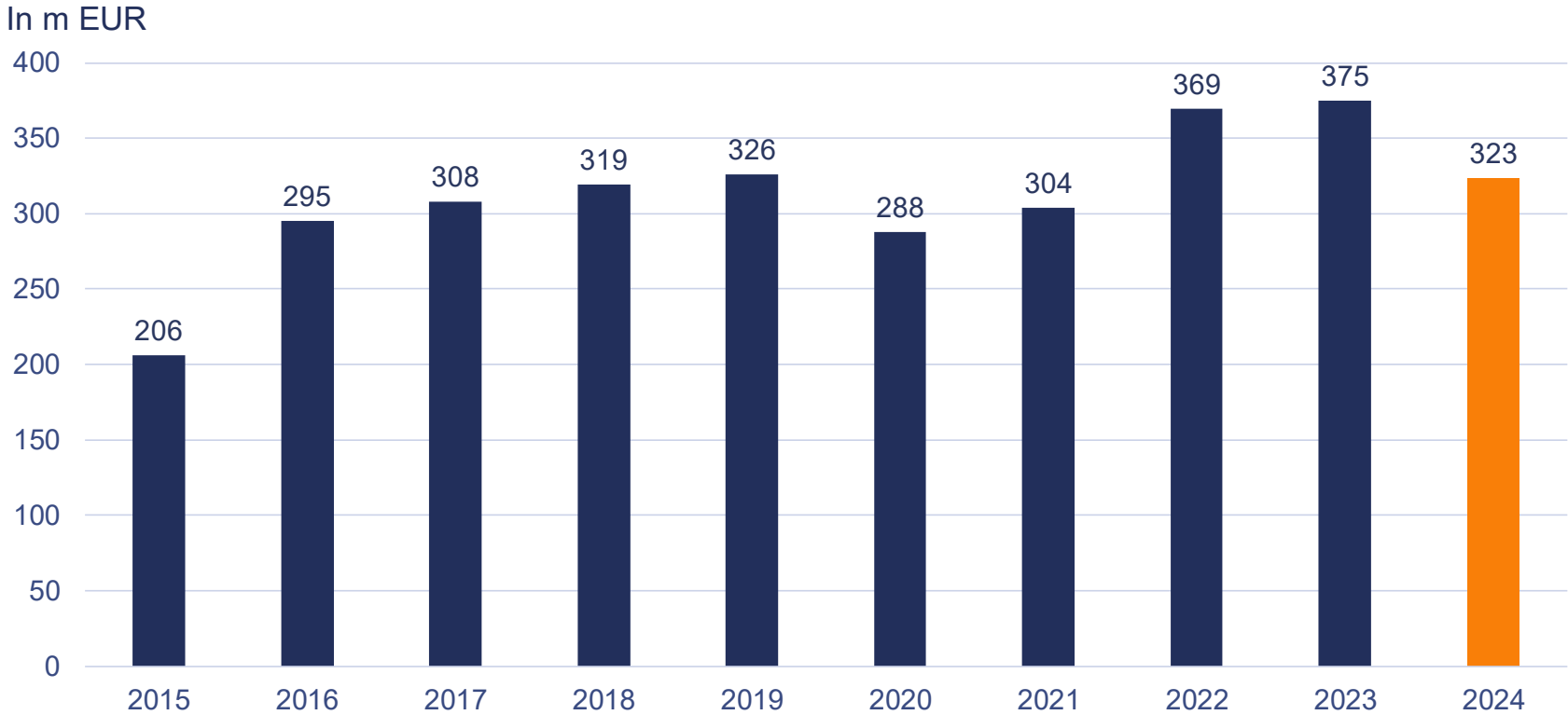
Source: Eurostat, VDMA

Belgium: Machinery exports to Germany



Source: Eurostat, VDMA

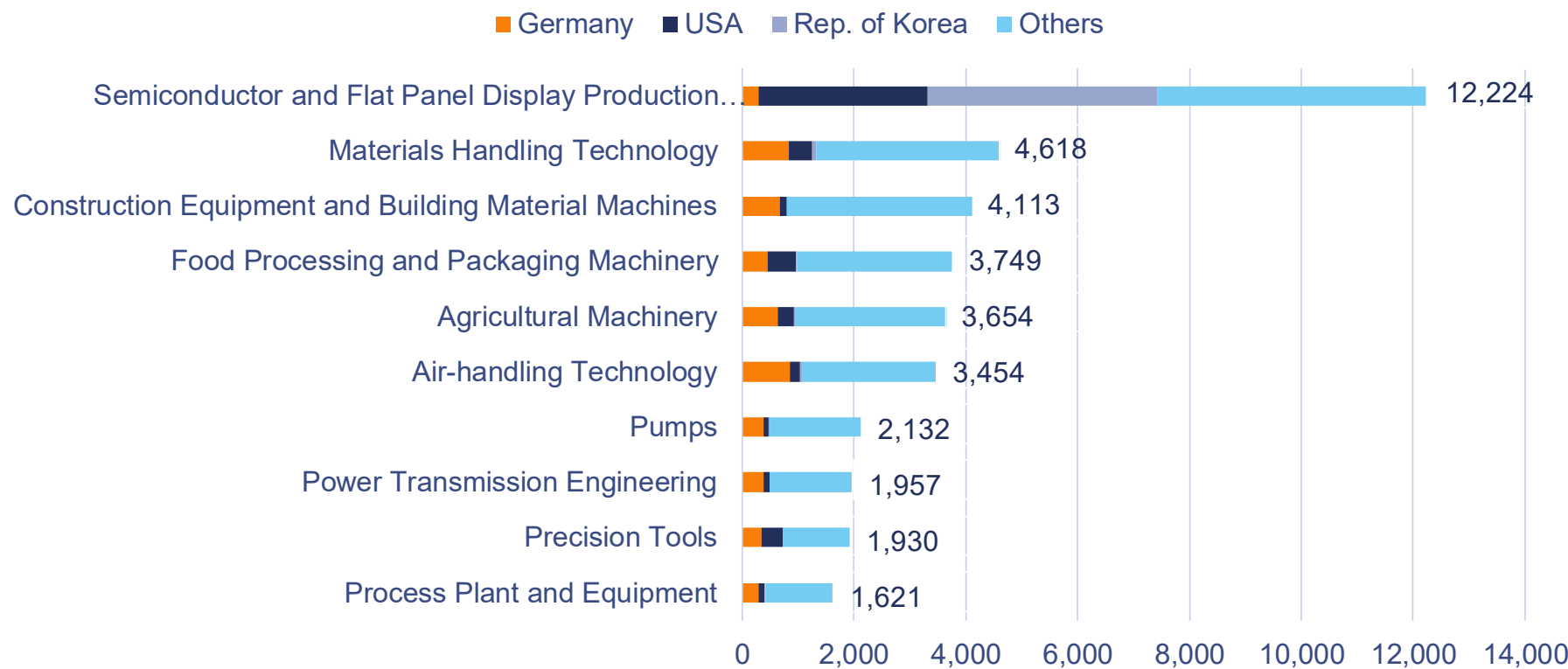
Luxembourg: Machinery exports to Germany



Source: Eurostat, VDMA

Netherlands: Machinery exports by sectors and countries

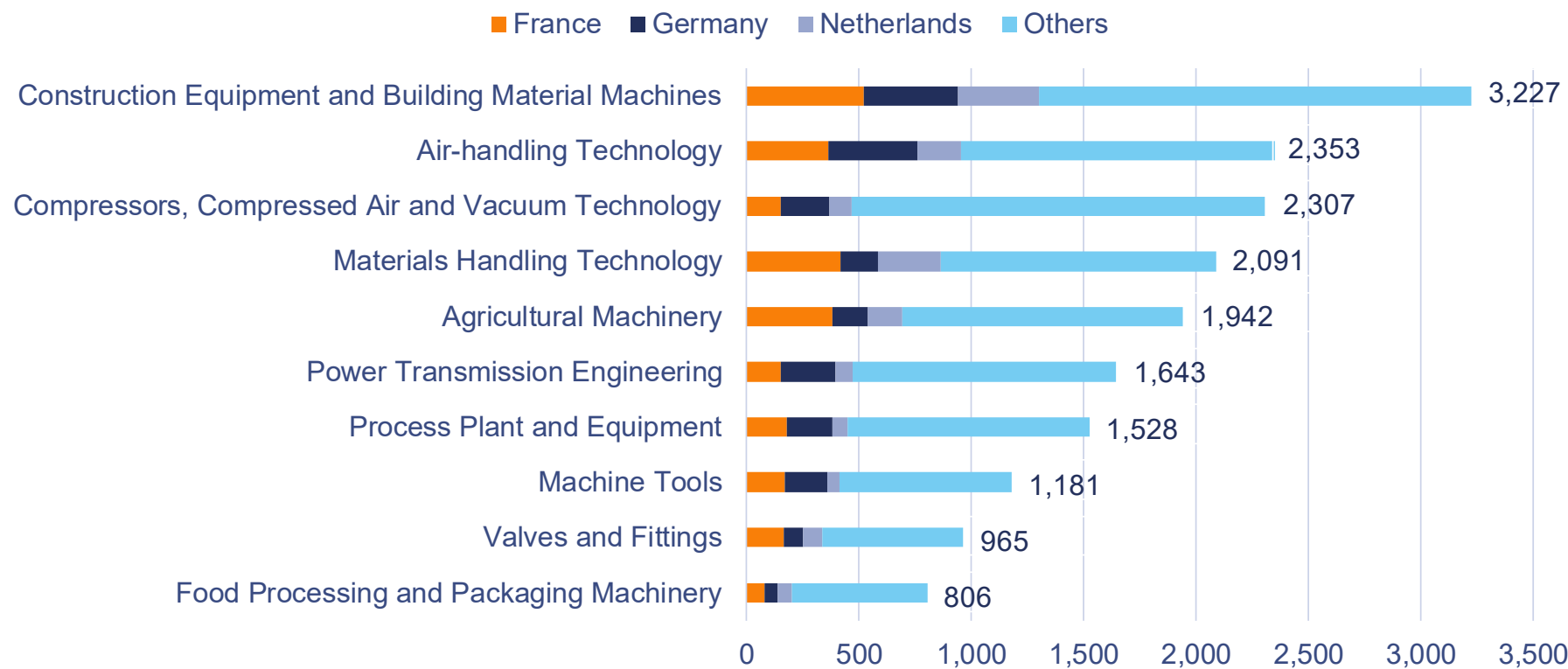
m EUR, 2024



Source: Eurostat, VDMA

Belgium: Machinery exports by sectors and countries

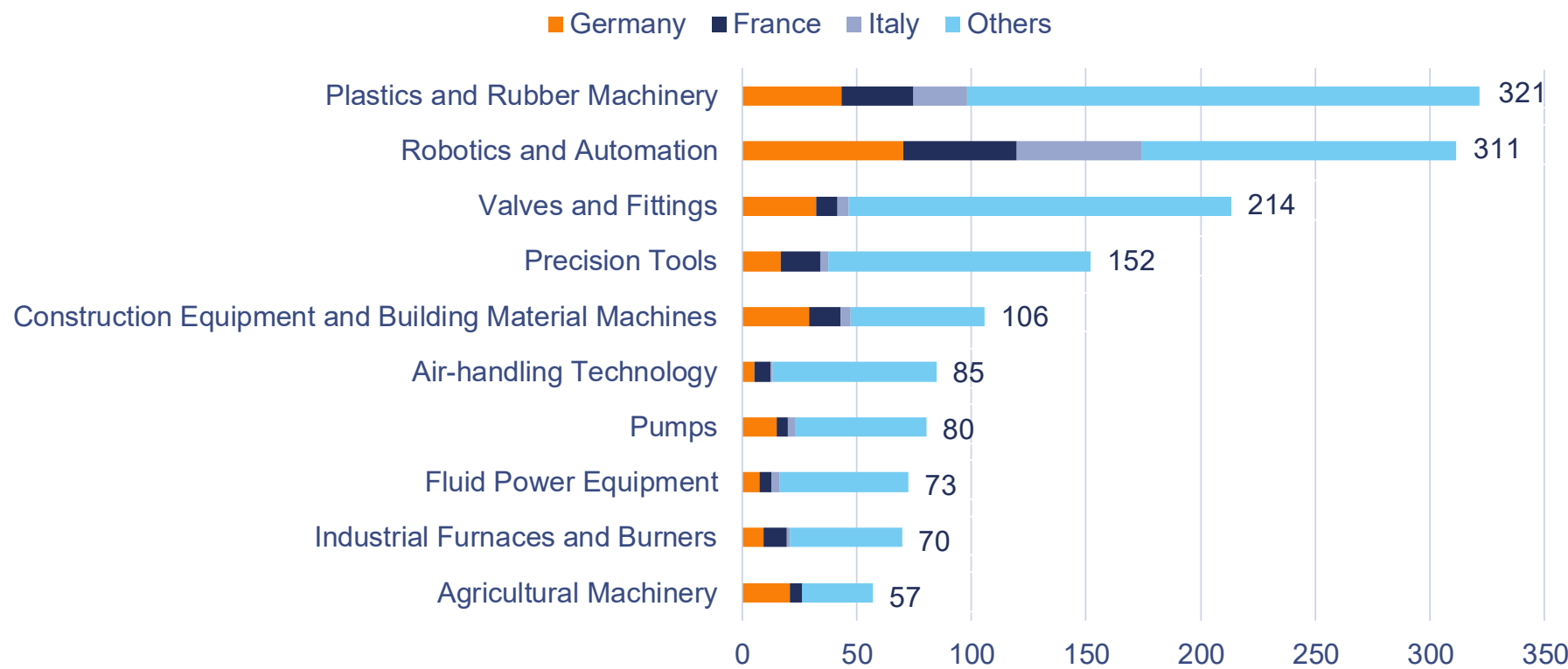
m EUR, 2024



Source: Eurostat, VDMA

Luxembourg: Machinery exports by sectors and countries

m EUR, 2024



Source: Eurostat, VDMA

Netherlands: Machinery imports

Machinery imports of Netherlands

Year	Total m EUR	Country shares in %					
		DE	CN	US	JP	BE	GB
2015	20,169	24.3	8.4	12.2	11.1	4.7	3.3
2016	24,418	28.0	7.3	9.6	8.4	6.4	4.4
2017	26,207	27.7	7.5	8.9	8.2	6.2	4.2
2018	30,273	28.7	7.7	9.4	8.1	5.6	4.1
2019	32,476	27.3	8.0	9.0	8.5	5.8	4.0
2020	30,769	28.8	8.6	9.5	7.2	5.8	3.7
2021	35,819	28.8	10.5	8.7	7.7	5.7	3.9
2022	40,564	28.4	11.4	8.7	7.5	5.7	4.4
2023	41,591	31.8	9.7	7.3	7.9	5.5	4.3
2024	38,017	33.2	11.4	6.9	5.9	5.4	4.3

Source: Eurostat, VDMA

Belgium: Machinery imports

Machinery imports of Belgium

Year	Total m EUR	Country shares in %					
		DE	CN	NL	US	FR	IT
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
2024	22,830	19.2	11.9	9.4	8.3	8.1	7.6

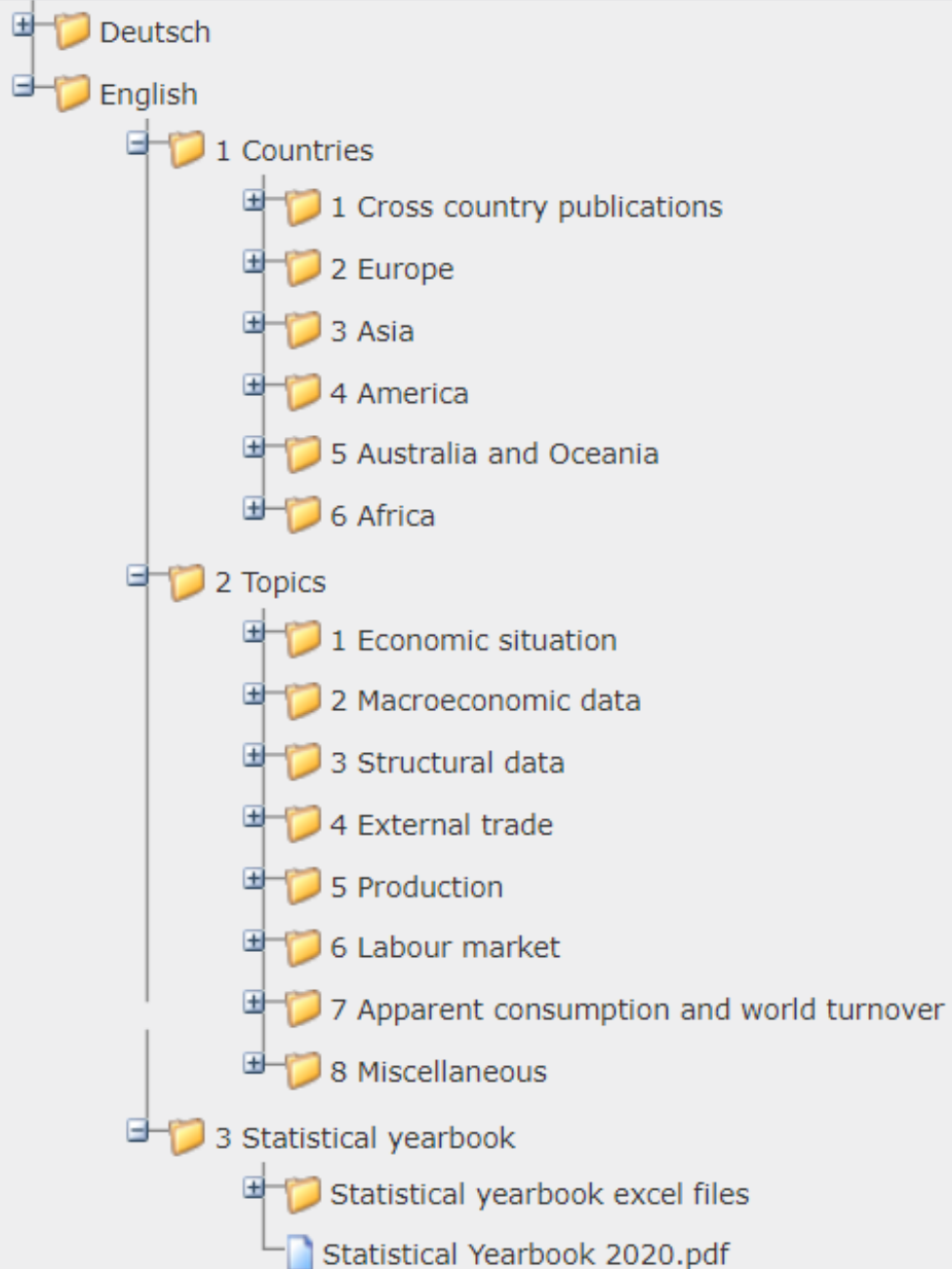
Source: Eurostat, VDMA

Luxembourg: Machinery imports

Machinery imports of Luxembourg

Year	Total m EUR	Country shares in %					
		DE	BE	FR	JP	IT	IE
2015	1,031	32.3	15.6	10.5	6.7	6.8	3.7
2016	1,317	28.1	14.0	8.9	19.4	5.1	2.6
2017	1,487	25.9	13.5	8.2	22.4	5.8	2.5
2018	1,483	27.4	14.1	8.8	15.7	6.4	3.3
2019	1,583	25.8	15.5	8.8	19.2	5.0	2.9
2020	1,532	29.8	14.5	9.0	13.9	4.8	3.3
2021	1,611	29.2	15.5	9.4	11.9	5.1	3.5
2022	1,707	28.7	13.9	9.1	13.5	4.7	3.7
2023	1,604	29.8	13.4	8.8	11.4	5.7	4.0
2024	1,434	32.2	15.1	10.2	6.7	5.1	4.4

Source: Eurostat, VDMA



Information on market opportunities: **VDMA Statistics Database**

Recognise growth potential.

Make informed decisions.

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- Interactive data explorer
 - International trade
 - German Production figures
 - VDMA New order and turnover statistics
 - Leading indicators all EU-27 countries by industries

Thank you for your attention.

FOR FURTHER INFORMATION PLEASE CONTACT:

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