European
Foundry
Federation

Annual report 2024

www.eff-eu.org

Contents

01 Preface

It is my pleasure to introduce the 2024 edition of our annual statistical review, The European Foundry Industry, now published under the name of the European Foundry Federation (EFF). This year's report represents the continuation of a long-standing tradition: providing the most comprehensive, accurate and timely overview of Europe's foundry sector. As always, the analysis is based on detailed contributions from our national member associations, complemented by additional data from non-member countries to ensure a complete and reliable representation of Europe's industrial landscape.

The past year has been one of the most demanding our industry has faced in decades. What began with cautious optimism rapidly turned into a broad-based slowdown across nearly all segments. Ferrous castings contracted sharply, non-ferrous production weakened, and employment and capacity utilisation declined throughout 2024. These developments occurred in a highly complex macroeconomic environment marked by uneven global growth, subdued industrial activity in Europe, tight financing conditions, and intensified competitive pressure from global overcapacity – particularly in China.

Quarter after quarter, demand eroded and many foundries struggled with reduced orders, rising regulatory requirements, and shrinking financial buffers. By the end of the year, a growing number of plants were operating at or below sustainable levels. These figures do not simply reflect a cyclical downturn; they reveal the depth of the structural challenges confronting Europe's industrial base.

At the geopolitical level, uncertainty increased further. The election of Donald Trump in the United States signals the possibility of renewed trade tensions and a stronger shift toward domestic industrial policy, with implications for export-dependent European sectors. Meanwhile, state-supported overcapacity in Asia is expected to continue exerting pressure on international markets in 2025. At the same time, key European customer industries – automotive, machinery, construction – are themselves undergoing profound transitions, adding complexity to the outlook.

And yet, this report also affirms the strategic importance of our sector. Foundries remain essential to Europe's value chains: from mobility and renewable energy to defence, infrastructure and industrial machinery. Our capacity to supply high-quality, technologically advanced and increasingly low-carbon castings is crucial to Europe's competitiveness, its reindustrialisation objectives, and its broader economic resilience.

This annual publication reflects EFF's commitment to transparency, knowledge-sharing and evidence-based policymaking. It is designed to support industry leaders, policymakers and stakeholders in understanding the evolving dynamics of our sector and in making the decisions that will shape its future. Certain data categories – such as production values – remain incomplete due to reporting limitations, yet this document remains the most authoritative and comprehensive statistical resource available for Europe's foundry industry.

I would like to express my sincere appreciation to all EFF member associations for their dedicated work in assembling this extensive body of data. Their contributions demonstrate the strength, professionalism and unity of our European foundry community during a particularly challenging year.

As we enter 2026, our Federation will continue to advocate for a competitive and resilient European industrial environment – one that offers foundries the conditions they need to invest, innovate and thrive. The year ahead will be demanding, but with coordinated action and a clear strategic vision, Europe's foundry sector can emerge stronger.

EFF – The European Foundry Federation

Chiara Danieli
President

Ainhoa Ondarzabal
Secretary General

Tillman van de Sand
Commission for economics & statistics, Secretary

European
Foundry
Federation

02

Total Survey

The European Foundry Industry in 2024

The Economy and the Casting Customer Industries

The Macro-economic Situation at the end of the year 2024

In 2024, the US economy continued to operate above its potential, supported primarily by robust domestic demand. Private consumption expanded by 2.8 percent – well above its long-term historical average of 2.4 percent (2000–19) – reflecting strong labour-market conditions and accumulated household savings. However, early indicators in 2025 point to a possible shift in momentum. Consumer spending fell by 0.6 percent in January and remained subdued in February after a strong December rebound. This cooling reflects both a gradual normalization of spending patterns and increasing sensitivity to recurring changes in fiscal and regulatory policy, which appear to be weighing on business confidence. Together, these developments suggest that the US cyclical position is weakening, with risks tilted to the downside as tighter financial conditions continue to unfold.

In the euro area, the economy entered a cyclical recovery phase in late 2023 and early 2024, yet growth remained modest. Domestic demand was constrained by weak consumer sentiment, high interest rates, and the lingering effects of the energy-price shock. With the exception of Germany, consumption growth appears to have reached a plateau in most large economies. Elevated uncertainty has increased precautionary savings, limiting household expenditure. Manufacturing activity remained depressed, hampered by persistently higher energy costs, supply bottlenecks in advanced components, and subdued global demand – particularly from China. By contrast, services continued to drive growth, but this contribution has led to increasing divergence across member states: economies with large industrial sectors, notably Germany, struggled to regain momentum, whereas others with stronger tourism and services bases, such as Spain, performed more dynamically. Investment also remained below pre-pandemic trends, as elevated financing costs and subdued order books discouraged firms from expanding capacity.

In China, structural fragilities continued to dominate the macroeconomic landscape. The prolonged correction in the real estate sector – an industry that historically accounted for roughly a quarter of GDP when including related activities – has weighed heavily on domestic demand, household wealth, and local government revenues. Measures introduced in 2024 and 2025 to stabilize the property market, including targeted liquidity support and eased purchase restrictions, have so far had limited success. Combined with ongoing demographic headwinds and declining private-sector confidence, this has resulted in weaker import demand and softer growth in China's industrial output. These trends have spillover effects globally, particularly on European exporters of capital goods and industrial components.

Global inflation moderated significantly through 2024, aided by the normalization of energy prices and easing supply-chain pressures. Major central banks maintained restrictive monetary policy to ensure inflation returned durably to target, with gradual easing expected only from mid-2025. Financial conditions therefore remained tight, limiting credit growth and exerting downward pressure on investment and construction activity – two sectors of particular importance for European foundries.

numbers

+1.2%

The aggregated GDP growth recorded in 2024 across EFF countries

Against this international backdrop, the macroeconomic situation of the EFF countries showed cautious improvement. Aggregate GDP expanded by 1.2 percent in 2024, a modest acceleration compared with the prior year. Labour-market conditions improved in several member countries with historically higher unemployment rates, leading the overall EFF unemployment rate to decline by 0.1 percentage points to 6.1 percent. Inflation continued its downward trajectory, reaching 5.5 percent – still above central-bank targets but markedly lower than the peaks of 12.0 percent in 2022 and 8.5 percent in 2023.

The combination of easing inflation, a gradual softening in interest rates from mid-2025 onward, and stabilizing energy markets could support a moderate demand recovery, particularly in construction and machinery – key downstream sectors for European foundries. However, the outlook remains clouded by several risks: geopolitical tensions affecting trade flows and energy security, ongoing industrial competitiveness challenges in Europe, and persistent overcapacity and pricing pressure from non-European producers. These factors continue to shape the operating environment of the foundry industry and reinforce the need for strong industrial-policy support at both national and EU level.

Table 1: General Economic Data

	Weighting		Gross Domestic Product			CONSUMER PRICES			Unemployment Rate		
	in %		Growth Rate in %			Growth Rate in %			in %		
	Popul.	GDP	2022	2023	2024	2022	2023	2024	2022	2023	2024
Austria	1.6	2.2	5.3	-1.0	-1.2	4.7	5.1	5.4	4.7	5.1	5.4
Belgium	2.1	2.7	4.2	1.3	1.0	10.3	2.3	4.3	5.6	5.5	5.7
Bulgaria	1.1	0.5	4.0	1.9	2.8	13.0	8.6	2.6	4.2	4.4	4.2
Croatia	0.7	0.4	7.3	3.3	3.8	10.7	8.4	4.0	6.8	6.2	5.5
Czech Republic	1.9	1.4	2.8	-0.1	1.1	15.1	10.7	2.4	2.2	2.6	2.8
Denmark	1.0	1.8	1.5	2.5	3.7	8.5	3.4	1.3	2.5	2.8	2.9
Finland	1.0	1.2	0.8	-0.9	-0.1	7.2	4.3	1.0	6.8	7.2	8.4
France	11.9	13.1	2.6	1.1	1.1	5.9	5.7	2.3	7.3	7.3	7.4
Germany	14.8	19.2	1.4	-0.3	-0.2	8.7	6.0	2.5	3.1	3.0	3.4
Hungary	1.7	0.9	4.3	-0.8	0.5	14.6	17.1	3.7	3.6	4.1	4.5
Italy	10.3	9.8	4.8	0.7	0.7	8.7	5.9	1.1	8.1	7.7	6.6
Lithuania	0.5	0.4	2.5	0.4	2.7	18.9	8.7	0.9	6.0	6.9	7.1
Netherlands	3.1	5.1	5.0	0.1	1.0	11.6	4.1	3.2	3.5	3.6	3.7
Norway	1.0	2.0	3.2	0.1	2.1	5.8	5.5	3.1	3.3	3.6	4.0
Poland	6.4	3.8	5.3	0.1	2.9	14.2	11.5	3.7	2.9	2.8	2.8
Portugal	1.8	1.3	7.0	2.6	1.9	8.1	5.3	2.7	6.2	6.6	6.5
Slovenia	0.4	0.3	2.7	2.1	1.6	8.8	7.4	1.9	4.0	3.7	3.7
Spain	8.5	7.1	6.2	2.7	3.2	8.3	3.4	2.9	13.0	12.2	11.3
Sweden	1.8	2.5	1.5	-0.1	1.0	8.1	5.9	2.0	7.5	7.7	8.4
Switzerland	1.5	3.9	3.1	0.7	1.3	2.8	2.1	1.1	2.2	2.0	2.5
Türkiye	14.9	5.5	5.5	5.1	3.2	72.3	53.9	58.5	10.4	9.4	8.7
UK	12.0	15.1	4.8	0.4	1.1	9.1	7.3	2.5	3.8	4.1	4.3
EFF[1]	**100.0**	**100**	**3.7**	**0.8**	**1.2**	**12.0**	**8.5**	**5.5**	**6.4**	**6.2**	**6.1**

Source: International Monetary Fund, World Economic Outlook Database, April 2025

1 Gross Domestic Product and Consumer Prices weighted by GDP share of EFF countries. Unemployment Rate weighted by population share of EFF countries.

The Economic Situation in the Major Casting Customer Industries

Vehicle construction

In 2024, production of electric passenger cars in Germany continued to expand despite a challenging environment. Output rose by 7% to a record 1.35 million units, with one in three cars produced now electric. Growth came almost entirely from battery-electric vehicles (BEVs), whose production increased by 11% to 1.06 million units, while plug-in hybrids (PHEVs) declined by 6% to 290,000 units as manufacturers shifted their focus toward full electrification.

By contrast, Germany's domestic market remained weak. New registrations fell by 1% to 2.82 million vehicles and remain 22% below 2019 levels. The abrupt end of BEV purchase incentives in December 2023 led to a sharp drop in BEV demand (-27% in 2024), while PHEVs recovered slightly from a very low base (+9%). Internal-combustion vehicles regained market share (+3%), reflecting consumer price sensitivity as well as persistent uncertainty about charging infrastructure, operating costs, and the long-term regulatory direction of electromobility.

An additional factor weighing on European producers has been the rapid increase in imports of Chinese-made EVs. These vehicles, benefitting from strong cost advantages and highly integrated supply chains, gained market share across Europe and intensified price competition, particularly in volume segments. This has put pressure on European manufacturers' margins at a moment of high investment needs and has contributed to a growing gap between domestic BEV production and domestic BEV sales. The situation adds urgency to industrial-policy debates, including the European Commission's ongoing anti-subsidy investigation.

Across Europe, just under 13.0 million passenger cars were registered in 2024 (+1% year-on-year), but volumes remain 18% below 2019. EV registrations (BEV+PHEV) declined by slightly more than 2%, underperforming the market as incentives were reduced. Among the major European markets, only Spain recorded strong growth (+7%), followed by the UK (+3%), while Germany and Italy each slipped by 1% and France by 3%. Central and Eastern Europe outperformed (+10%), with Poland posting the strongest growth in Europe (+16%) followed by the Czech Republic (+5%) and Romania (+6%).

The transition also continued in the bus segment: of 5,382 new buses registered, nearly one-third (1,745) used alternative powertrains, including 713 fully electric units (13.2%). However, the overall bus market contracted by 2%, reflecting constrained public budgets and longer procurement cycles.

Mechanical engineering

The mechanical engineering sector experienced a pronounced downturn in 2024. After production began to contract in mid-2023, machinery manufacturers across the EU faced a particularly difficult year, with output declining by around 7%. Aside from the exceptional disruptions of the coronavirus year 2020 and the global financial crisis in 2009, such a steep contraction had not been recorded since the recession of 1992-93.

This decline reflects a combination of cyclical and structural pressures. Weak industrial activity across Europe, subdued global investment, and tight financing conditions sharply reduced demand for machinery and equipment. Order intake fell throughout the year as customers postponed or cancelled investment projects in response to economic uncertainty and elevated borrowing costs. Persistent weakness in key customer industries – automotive, construction, and parts of the process industry – added to the burden. In export markets, European producers also faced growing competitive pressure from Asian suppliers, while geopolitical tensions and trade frictions complicated international sales.

Together, these factors created one of the most challenging operating environments for EU mechanical engineering in decades, affecting capacity utilisation, profitability, and investment plans across the sector.

Building industry

Construction activity in the 19 EUROCONSTRUCT countries contracted by 2.4% in 2024, marking the second consecutive year of decline. A slight recovery is expected in 2025, with modest growth of around 0.6%, before momentum gradually strengthens over the following two years.

The main pressure point in 2024 was the sharp fall in new residential construction, extending the downturn already visible in 2023. High property prices, still elevated interest rates despite the beginning of a monetary easing cycle, and persistently high construction costs all weighed heavily on demand. Although a stabilisation is expected in 2025, the market will remain subdued. The residential renovation segment also weakened, recording a small contraction in 2024 and an additional decline expected in 2025. A more visible improvement in the housing sector is projected from 2026 onward, supported by demographic needs, the normalisation of financing conditions, and more effective subsidy schemes aimed at energy-efficient renovation.

The non-residential construction sector faced similar challenges. After a modest decline in 2023, activity continued to soften in 2024 as many new projects were delayed or cancelled amid economic uncertainty and rising project financing costs. Nonetheless, a return to growth is anticipated from 2025. Both new construction and renovation are expected to contribute to the upturn, with the strongest investment impulses coming from publicly funded segments such as education, health facilities, and administrative buildings. At the same time, EU and national "green transition" policies – particularly energy-efficiency requirements and decarbonisation targets – are set to provide a stable, long-term push to renovation work across commercial and institutional buildings.

Civil engineering remains the most resilient and dynamic part of the construction sector. Demand continues to be driven by urgent investment needs in transport networks, digital infrastructure, and energy systems, including grid reinforcement, renewable integration, and hydrogen-readiness projects. After a softer year in 2024, new civil engineering projects are expected to expand significantly in 2025 and 2026, while renovation activity will follow a more moderate but still positive path before gradually slowing toward the end of the forecast horizon. Strong public funding, European recovery instruments, and national infrastructure plans will remain the key drivers of this positive trajectory.

Steel industry

According to worldsteel, global crude steel production reached 1,839 million tonnes in 2024, a slight decline of 0.9% compared with the previous year. The downturn reflects continued weakness in global manufacturing, subdued construction activity in many regions, and persistent overcapacity pressures – particularly in Asia.

In the European Union, crude steel production fell more sharply. Output declined by 2.6% to 129.5 million tonnes as high energy prices, weak industrial demand, and tighter environmental regulation further strained the competitiveness of EU steelmakers. Germany produced just under 37.2 million tonnes, an increase of 5.2% year-on-year, but still remained below the symbolic threshold of 40 million tonnes for the third consecutive year – an indicator of the prolonged recession affecting the German steel industry.

Asia remained the dominant producing region, accounting for nearly three-quarters of global output. Crude steel production in Asia slipped by 1.0% to 1,358 million tonnes. China alone represented roughly 55% of world steel production, and its ongoing property-sector downturn and muted industrial activity continued to weigh on regional output and global steel markets.

In North America, producers were unable to sustain the production levels of 2023. Output declined by 4.2% to 105.9 million tonnes, with the United States accounting for 79.5 million tonnes (-2.4%). Slower industrial demand, combined with competitive import pressures, contributed to the reduction.

The CIS countries also recorded a contraction. Crude steel production is estimated at 84.8 million tonnes in 2024, down 4.2% from the previous year, reflecting continued geopolitical disruptions, trade-flow reorientation, and constrained investment.

The Foundry Industry

Ferrous Castings Trends 2024

In 2024, ferrous foundries across the EFF member states recorded one of the most significant downturns of the past decade. Total output fell to 9.0 million tonnes, a decline of 13.2 percent compared with 2023. The sector remains structurally concentrated. Germany, Türkiye, France, Spain and Italy, together with one additional medium sized producer, accounted for around 82 percent of total ferrous tonnage.
The contraction affected almost all major producing countries. Portugal and the United Kingdom were the only member states to report positive production figures for the second year in a row, showing continuity rather than a rebound effect. Across the rest of Europe, reduced order volumes, lower utilisation and a weakening customer environment shaped the overall development.
The pattern within the year was particularly concerning. The industry entered 2024 with relatively strong volumes in the first quarter, supported by remaining backlogs from 2023. In the following quarters production softened visibly. The second quarter already showed losses, the third quarter saw a further decline and the last quarter marked the lowest output since the immediate post pandemic period. This ongoing erosion leaves the European ferrous foundry landscape with an extremely weak starting point for 2025.

The value of ferrous casting production decreased to 22.5 billion euro, which corresponds to a decline of 11.7 percent compared with the previous year. All reporting member states recorded reductions in revenue, although to very different degrees. In Italy, revenue decreased by 22.9 percent, reflecting subdued domestic demand and a difficult export environment. In United Kingdom, by contrast, the reduction was limited to 1.1 percent, indicating comparatively stable conditions in domestic and regional markets.
These developments show the growing heterogeneity of the ferrous casting landscape in Europe. Country specific demand structures, energy costs and industrial policy environments increasingly influence the ability to maintain stable output.
Employment in ferrous foundries fell to 99,400, a reduction of 7.5 percent compared with 2023. This reflects both the cyclical weakness and the longer running structural pressure on labour intensive casting operations in Europe.

Alongside falling employment, the number of operating plants continued to decrease. Around 100 ferrous foundries closed permanently in 2024. Some cases were linked to insolvency and others to strategic consolidation or the inability to fund rising investment and regulatory requirements. As a result, the total number of active ferrous foundries in EFF member states fell to 1,553. The combination of lower output, reduced employment and fewer plants highlights the extent of the structural transformation within the sector.

Non-Ferrous Metal Castings Trends 2024

The non-ferrous segment performed more steadily than the ferrous segment, although it also recorded a decline. Total output in EFF member states fell by 4.2 percent to 3.5 million tonnes in 2024. The structure of the sector continues to be dominated by Italy, Germany and Türkiye, which together accounted for 66 percent of total non-ferrous production.
There was a mixed picture across the member states. Türkiye achieved a modest increase of 1.3 percent. Austria recorded an increase of 5.7 percent. Sweden maintained production broadly at the previous year's level. In most other countries output declined, reflecting weak demand in automotive castings, household goods, electrical equipment and other consumer-oriented segments. Light metal castings, especially aluminium, continue to play a decisive role in the overall structure of non-ferrous production in Europe.

Total production value decreased to 19.5 billion euro, which corresponds to a decline of 7.5 percent compared with 2023. Only Türkiye and Spain reported increases. In most other countries, lower order volumes and more intense price competition resulted in direct reductions in revenue. The value decline in the non-ferrous sector was more pronounced than the reduction in tonnage, which indicates stronger pressure on margins.

Employment in the non-ferrous sector decreased to 88,900. This equals a reduction of 2.6 percent compared with 2023. Although this decline was smaller than in the ferrous sector, it still illustrates the overall pressure within the industry. Several smaller plants reduced shifts or adjusted capacity in response to weakened demand, leading to a gradual consolidation of the non-ferrous sector.

Sector Wide Interpretation: A Year of Continuous Weakening

Across all segments, 2024 was characterised by a pattern of ongoing deterioration. The year began with comparatively strong figures in the first quarter but lost momentum in all subsequent quarters. This was visible in both ferrous and non-ferrous production. The decline was therefore not caused by a single external impulse but was the result of a continuous and broad-based reduction in demand across Europe. Many foundries entered 2024 with limited financial reserves. Lower utilisation, reduced profitability, rising regulatory requirements and cautious investment behaviour placed the sector under sustained strain. By the end of the year, a considerable share of European foundries was operating at or below sustainable levels. Maintenance and investment budgets were reduced, and long-term planning remained difficult. This situation forms a very weak foundation for the year 2025.

Outlook: An Environment of Increasing Difficulty in 2025

The election of Donald Trump as president of the United States at the end of 2024 introduces a new period of geopolitical and trade policy uncertainty. A stronger focus on domestic industrial policy in the United States is expected, which will influence the global flow of goods and could have a negative effect on export dependent foundry segments in Europe. At the same time, the global environment is shaped by significant excess capacities in Asia. In particular in China, considerable state supported production volumes are likely to reach international markets in 2025. These capacities, supported by national industrial strategies and export-oriented policies, will increase pressure on European producers in both ferrous and non-ferrous segments.
European customer industries also face structural challenges. Automotive manufacturers are dealing with volatile demand in electric mobility. Construction output remains weak in many member states. Machinery producers are confronted with subdued global investment. This combination results in an environment that does not offer signs of a general recovery in the short term.

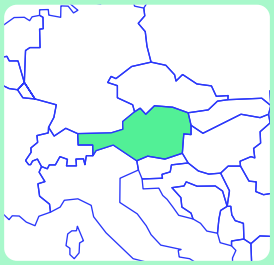
The European foundry sector therefore enters 2025 with very limited resilience. After a year of continuous decline in 2024, many foundries have only a small financial and operational buffer left. Without improvements in demand, policy conditions and competitive factors, the sector is moving into what may become one of the most demanding periods of the past decades.

Source:
IMF, ACEA, VDA, VDMA, Euroconstruct, Worldsteel, EFF

European
Foundry
Federation

03

Reports of the Countries



CAPITAL
Vienna

POPULATION IN 2024
9.178 Million

GDP IN 2024 (CURRENT PRICES)
€ 481.74 Billion
(-1.2% vs. 2023)

GDP PER CAPITA IN 2024
€ 52,599

UNEMPLOYMENT RATE (2024)
5.4%

CONSUMER PRICE (2024 VS. 2023)
5.4%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Austria

The Austrian foundry industry in 2024

Austria's economy presents both opportunities and risks. While digitalization, sustainability, and a strong domestic economy could drive growth, inflation, geopolitical uncertainties, and rising costs remain key challenges. The decisive factor will be whether policymakers can swiftly and effectively implement measures to strengthen Austria as a business hub. The industry's own survey indicates declines in production, revenue, and employment for 2024. Total production for the year stands at approximately 270,091 tons, reflecting a slight decrease of -0.1% compared to 2023. The industry's total revenue has dropped by -16.3% year-over-year, amounting to around €1.42 billion.

Iron casting has a total production of 130,498 tons for 2024 and has fallen by -5.6. Turnover has also fallen by -6.5% to around € 489 million. Ductile cast iron production amounted to 93,222 tons, a decrease of -6.7% compared to 2023. Steel casting also fell to 5,400 tons, which corresponds to a decrease of -15.8% compared to 2023. Production of grey cast iron fell by -0.1% compared to 2023 to 31,876 tons. In non-ferrous castings, production increased by 5.7% and sales fell by decreased by -20.7 %.

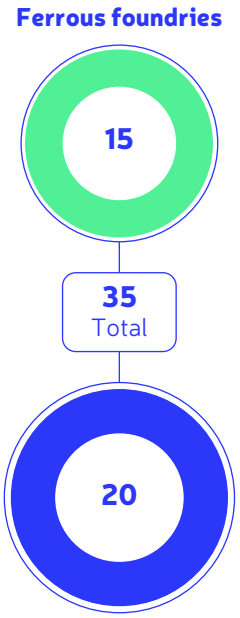
In 2024, a total of 5,933 employees (white-collar and blue-collar workers) were employed, which corresponds to -3.2% compared to 2023. The number of apprentices in the industry division who are being trained in the sector's own apprenticeships (foundry technology and metal casters) has increased compared to 2023. Unfortunately, the order situation at companies remains tense and significantly below the level of previous years.

Investment plans are very cautious due to the major economic burdens and high interest rates, combined with the uncertain economic situation. The industry is currently still suffering from capacity utilisation problems, high fluctuations in existing orders and great uncertainty regarding future developments. The collectively agreed increase in wages and salaries is 8.5% as in 2023. As in the previous year, commodity prices fluctuated in 2024. Electricity, energy and gas prices in Austria are still at a high level and continue to place a heavy burden on the industry and remain an operational challenge.

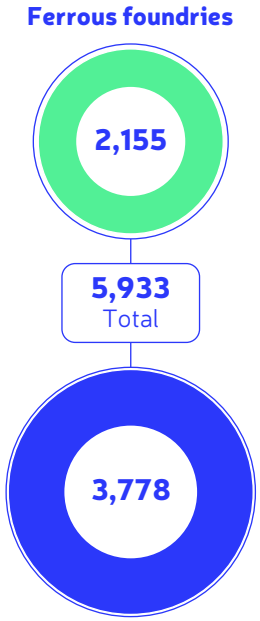
The current situation remains highly critical and uncertain. Most companies are facing capacity utilization issues, with declining and unpredictable order backlogs. Deliveries for e-mobility are significantly below planned expectations. Overall, the economic environment is extremely strained, leading many companies to adjust their workforce. KTM's challenges are placing additional pressure on the supplier industry. After years of stability, employment in the sector has now declined significantly. While the outlook for the future remains hopeful, uncertainty persists.

Highlights Austria

Number of foundries

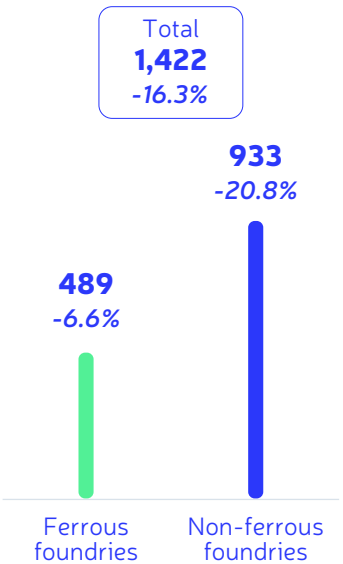


Number of employees



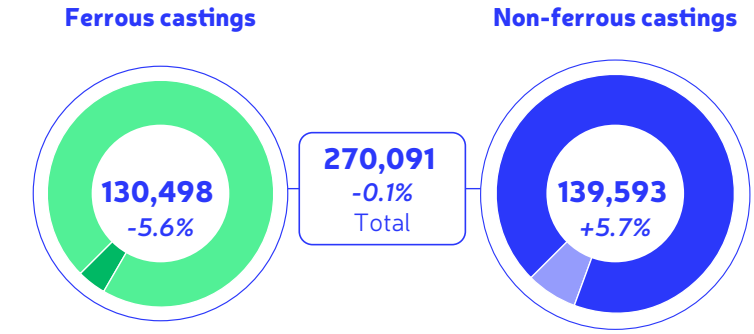
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



125,000 Iron castings ↘ -8.1%

5,400 Steel castings ↘ -15.8%

130,215 Light and ultralight castings ↘ +5%

9,378 Other non-ferrous castings ↗ +15.4%

CAPITAL
Zagreb

POPULATION IN 2024
3.862 Million

GDP IN 2024 (CURRENT PRICES)
€ 85.90 Billion
(+3.8% vs. 2023)

GDP PER CAPITA IN 2024
€ 22,200

UNEMPLOYMENT RATE (2024)
5.5%

CONSUMER PRICE (2024 VS. 2023)
4.0%

Source of data: Eurostat and International Monetary Fund, World Economic Outlook Database, April 2025

Croatia

The Croatian foundry industry in 2024

For the Croatian metal processing industry, 2024 was one of the more challenging years. Business revenues slightly declined (-0.2%), marking the first annual decrease in the medium term, while exports - accounting for about half of sector income - also fell. Investment activity dropped sharply (-21%) to its lowest level since 2021. Profitability weakened, with the EBITDA margin falling below 11%, the lowest since 2019. Labor cost pressures remained high, as average gross wages recorded the steepest growth in recent years, well above the medium-term average.

The industry faced growing uncertainty amid increasingly complex operating conditions. Following relative resilience in 2023, risks such as high energy prices, persistent inflation, weaker activity in the European metalworking sector, and geopolitical tensions affected performance. These factors led to supply chain disruptions, volatility in raw material and energy prices, and limited access to key markets. After a period of strong growth, export momentum slowed, while high labour costs and a shortage of skilled workers continued to weigh on operations. Negative trends in the European automotive industry — a key buyer of metal components — further dampened market prospects.

Croatian foundries continued to experience declining order volumes in 2024, in some cases facing a sharp drop in demand. The ongoing war in Ukraine, together with global political and economic uncertainty, continues to create an unfavourable business environment in Europe. No significant improvement is expected in early 2025.

A key structural issue remains strong wage growth in Croatia, particularly in the public sector, which adds pressure on private companies already constrained by workforce shortages. Employee mobility remains high, and foundries struggle to recruit and retain qualified personnel despite gradual improvements in working conditions. To mitigate this, many are increasingly hiring workers from distant countries such as India, the Philippines, Nepal, and several African nations.

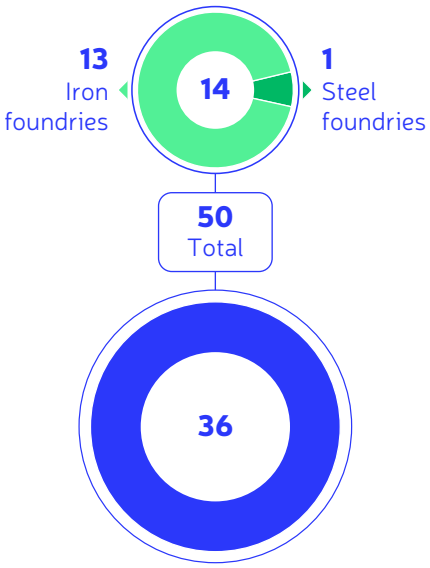
Production volumes in 2024 declined significantly compared to 2023, returning to levels similar to 2019. Industrial output remains volatile, with many foundries simultaneously facing workforce reductions, limited modernization, and rising wage demands.

As a highly export-oriented industry, the performance of Croatian foundries will largely depend on the broader economic situation in Europe and globally. Given the ongoing war in Ukraine and reduced order volumes from key customers, current challenges are expected to persist throughout 2025.

Highlights Croatia

Number of foundries

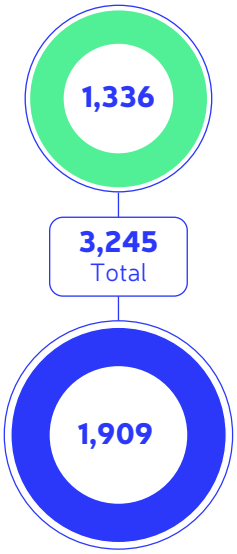
Ferrous foundries



Non-ferrous foundries

Number of employees

Ferrous foundries

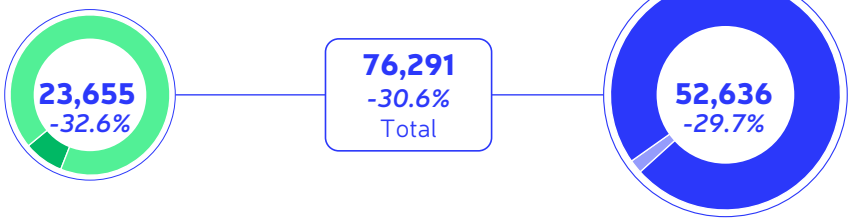


Non-ferrous foundries

Production value

(tons and % change 2024 vs. 2023)

Ferrous castings



- **23,653** Iron castings
- **2** Steel castings

Non-ferrous castings

- **52,454** Light and ultralight castings
- **182** Other non-ferrous castings

Highlights Croatia

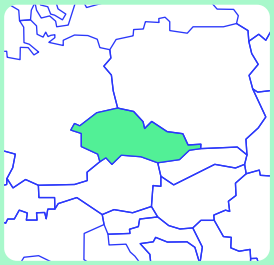
Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

IRON CASTINGS

General engineering	23,603	99.8%
Automotive	0	0
Other	50	0.2%

STEEL CASTINGS

General engineering	2	100%
Automotive	0	0%
Other	0	0%



CAPITAL
Prague

POPULATION IN 2024
10.909 Million

GDP IN 2024 (CURRENT PRICES)
€ 331.08 Billion
(+1.1% vs. 2023)

GDP PER CAPITA IN 2024
€ 30,276

UNEMPLOYMENT RATE (2024)
2.8%

CONSUMER PRICE (2024 VS. 2023)
2.4%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Czech Republic

The Czech Republic's foundry industry in 2024

In recent years, the foundry industry, or the entire manufacturing industry, has been under strong pressure from the imprudent setting of the Green Deal. The extreme, even sectarian effort of the ECE for a "green" Europe has pushed all energy-intensive industries into a corner. The foundry industry and the entire manufacturing industry will always be energy-intensive, using carbon as a basic element for production.

Carbon neutrality is out of the question here. The foundry industry and the entire manufacturing industry in Europe must have set rules that will lead to sustainability and development in a natural way. Ill-considered regulations and green ideology spread by a wide range of people living in Europe are hampering and stifling industrial growth. This gives room for competition from non-European manufacturers. This direction strongly weakens Europe and makes it economically vulnerable. The Green-Deal policy, as adopted, is based on cheap raw material resources from Russia. However, the situation in Europe has changed and the European central management cannot (does not want) to respond to this situation. The impacts are fatal and are manifested mainly in energy prices and rising inflation. All energy-intensive industries in Europe, including the foundry industry, are losing their competitiveness. In the Czech Republic, as an industrialized country with a generation of 30% of GDP, energy prices have had a significant impact on the loss of orders. The foundries therefore responded by restructuring and reducing production capacity. This was inevitably reflected in the total production, which in 2024 amounted to about 245 thousand tons of castings.

In a year-on-year comparison of mass production, this decrease amounted to about 13%. However, in a year-on-year comparison of foundry companies' turnovers, this decline was only about 2%, which only confirms the strong inflation caused by (all) energy prices, wage costs, necessary green investments or all green fees such as emission allowances, renewable resources, etc.

numbers

-13%

The decline in production recorded by Czech foundries in 2024 compared with the previous year

Energy prices are essential for the production of Fe-based castings. The triple price of energy in Europe, compared to non-European competition, supported imports from Asian territories. All deliveries of castings to Germany, on which our foundries were to a certain extent dependent, decreased. Another negative impact on the production of Fe castings was the decline in engineering production in the Czech Republic. On the other hand, some production was brought to our foundries by government contracts for infrastructure construction and regional construction.

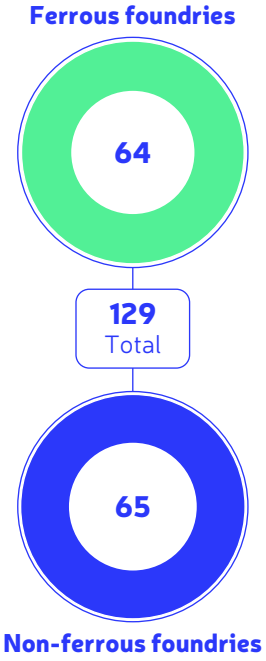
The high price of energy is a fundamental problem in the production of steel castings more than in others. Carbon steel production is becoming interesting in terms of cheaper prices of raw materials. These castings are used in the construction industry, construction machinery and welded engineering parts. The production of alloyed steel castings is hampered by metallurgical and economic demands. The price of alloying additions has climbed to all-time highs. Designers are looking for other, cheaper solutions. A huge and fundamental impact on the decline in the production of steel castings in the Czech Republic was the termination of production of the largest giants Vítkovice Heavy Machinery and Pilsen Steel. Heavy castings moved to India and China. The Russian embargo has limited established production and also reduced the production of our steelworks. New opportunities for Czech steelworks appear in the (armament) defence industry of Europe. The market is uncompromising here as well and prices significantly affect the success of our steelworks.

The future of shaped parts lies in light metals. Aluminium alloys are dominant for the automotive industry. Despite the pressure on low prices and high demands, they are the driving force of die casting foundries. The gradual transition to electric mobility is leading to further foundry challenges. Automotive manufacturers' demand for structural castings has stabilized. However, due to the uncertainty of demand development and market fluctuations, they are very risky in terms of return on necessary investments. Due to the crisis in Europe, automotive production is resorting to simple, economically undemanding solutions with maximum use of sheet metal components and moulded plastics.

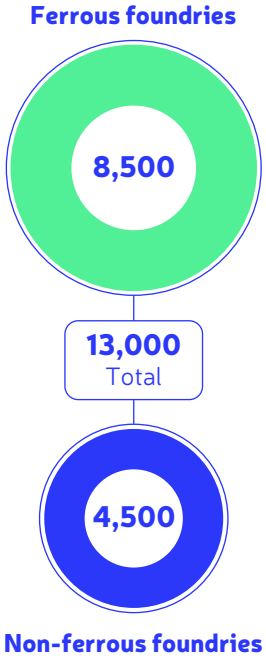
The priority is the price of cars. Energy-saving solutions are being sought in an effort to succeed in the aggressive policy of Chinese car manufacturers, which benefit from the simple and easy production of electric cars. Last year, 91,000 tonnes of non-ferrous metal castings were produced in the Czech Republic. This meant a decrease of about 7% compared to the previous year. For light aluminium and magnesium alloy castings, the decrease was about 5%. For heavy non-ferrous copper-based metals, this drop was about 10%.

Highlights Czech Republic

Number of foundries

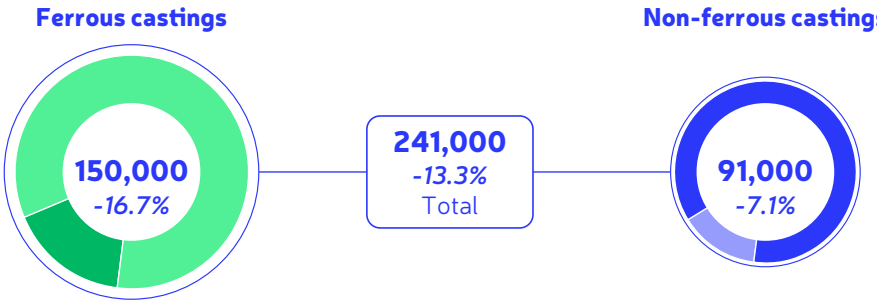


Number of employees



Production

(tons and % change 2024 vs. 2023)

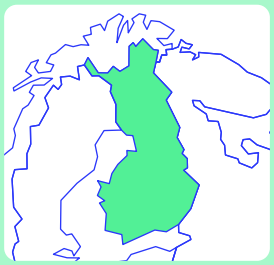


125,000 ↘ *-12.6%*
Iron castings

25,000 ↘ *-32.4%*
Steel castings

78,300 ↘ *-4.7%*
Light and ultralight castings

12,700 ↘ *-19.6%*
Other non-ferrous castings



CAPITAL
Helsinki

POPULATION IN 2024
5.612 Million

GDP IN 2024 (CURRENT PRICES)
€ 276.17 Billion
(-0.1% vs. 2023)

GDP PER CAPITA IN 2024
€ 49,282

UNEMPLOYMENT RATE (2024)
8.4%

CONSUMER PRICE (2024 VS. 2023)
1.0%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Finland

The Finnish foundry industry in 2024

The economic situation of the Finnish technology industry around the turn of the year was rife with contradictory signals. The European export market has remained very weak. At the same time, global uncertainty has mounted significantly, and companies' outlooks, as measured by various barometers, remain quite pessimistic. However, order intakes in the technology industry saw substantial growth in the fourth quarter of the year 2024. Although the increase in order intakes is largely explained by a handful of very significant individual orders, this could be interpreted as the first tangible sign that the economic cycle is closer to an upswing. However, it is too early to declare that there has already been a turn for the better. According to the evidence, it is all too clear that the economic climate has remained weak.

The turnover of mechanical engineering companies (machinery, metal products and vehicles) in Finland decreased by around 5 per cent in 2024 from 2023. Their turnover in Finland amounted to approximately € 38 billion in 2024.

At the end of December 2024, the value of order books was 3 per cent higher than in December 2023. It should be noted that shipyards have an exceptionally large share of the total value of order books. On the basis of order trends at the end of last year, the turnover of mechanical engineering companies is expected to start rising gradually this year.

The turnover of metals industry companies (steel products, non-ferrous metals, castings and metallic minerals) in Finland decreased by approximately 9 per cent in 2024 from 2023. In 2024, their turnover in Finland amounted to slightly more than EUR 13 billion. Last year, revenue was burdened by producer prices that were substantially lower than in the previous year, and by industrial action in early 2024.

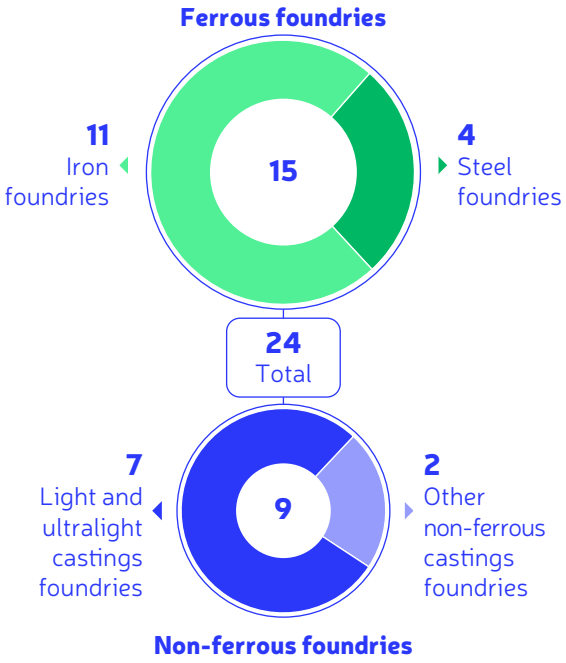
The production of iron and steel castings was 35,282 tons which is 24% less compared to year 2023. Iron and nodular iron casting production decreased about 24% and steel casting decreased about 23%. Metal castings production was 3,526 tons in 2024, which is about 19% less than the previous year. The value of the casting production of Finnish foundries in year 2024 was 212 m€, which is 13% less compared to year 2023. The foundry industry employed 1,365 people, 55 less than in 2023.

The main reason for the sharp drop in production was the unstable global situation. Due to uncertainty, foundries' customers invested in excessively large inventories in previous years, which were then depleted in 2024. Also investments in the engineering industry, which is very important sector for Finnish foundry industry, were frozen in 2024. Production is expected to grow by 10-20% in 2025.

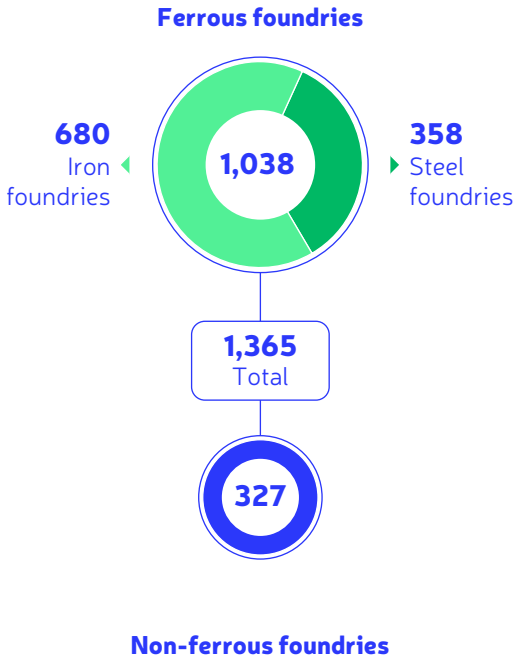
Challenges for the Finnish foundry industry include the availability of labor, foundry technology education, the availability of raw materials, and EU regulations such as SF BREF. On the other hand, the availability or price of energy is not a problem in Finland, thanks to abundant renewable energy (water, wind, solar) and nuclear power.

Highlights Finland

Number of foundries

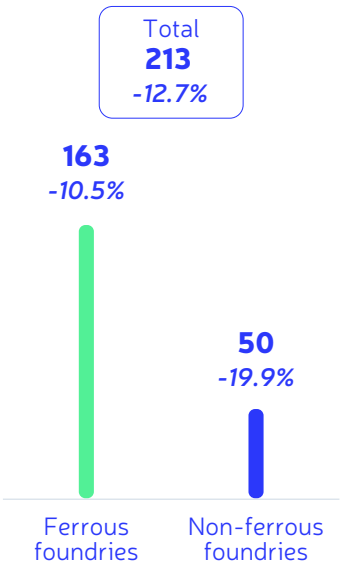


Number of employees



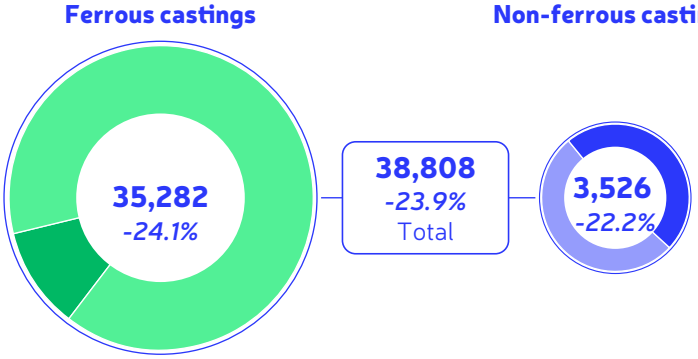
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)

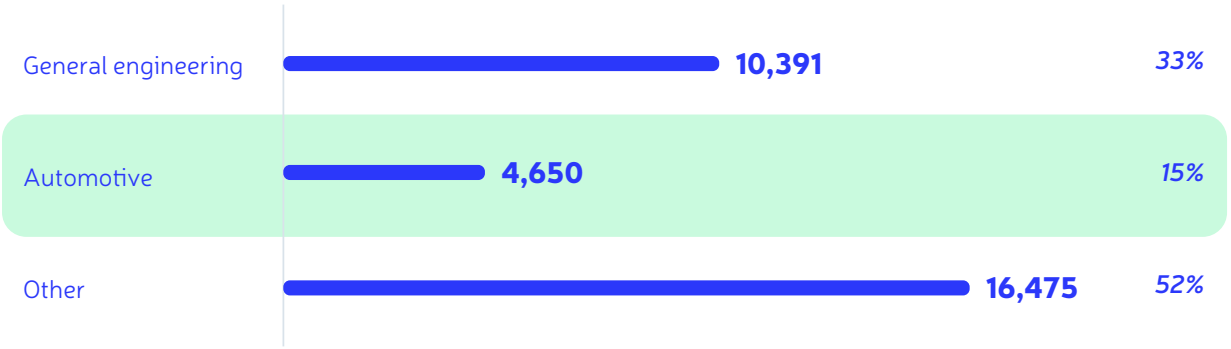


- **31,516** Iron castings ↘ -23.8%
- **3,766** Steel castings ↘ -23.1%
- **1,691** Light and ultralight castings ↘ -5.9%
- **1,835** Other non-ferrous castings ↘ -32.9%

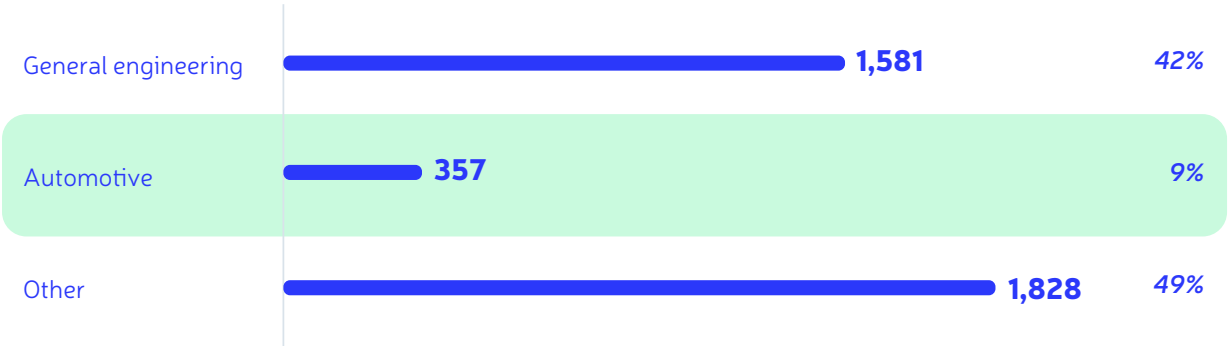
Highlights Finland

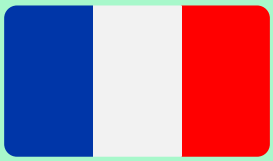
Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

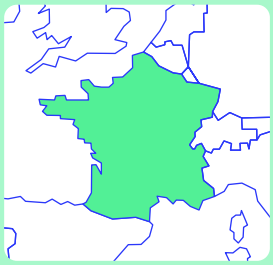
IRON CASTINGS



STEEL CASTINGS







CAPITAL
Paris

POPULATION IN 2024
68.628 Million

GDP IN 2024 (CURRENT PRICES)
€ 2,922 Billion
(+1.1% vs. 2023)

GDP PER CAPITA IN 2024
€ 42,700

UNEMPLOYMENT RATE (2024)
7.4%

CONSUMER PRICE (2024 VS. 2023)
2.0%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

France

The French foundry industry in 2024

French GDP increased by +1.1% in 2024. This economic growth is due to the increase in domestic demand. Household consumption increased by +1.0% in 2024. However, business investment decreased by -2.4% in volume over the whole of 2024. In this context of growth, inflation increased by +2,0% in 2024. The unemployment rate is limited to 7.4% in 2024 (annual average). Industrial production increased by +0.2% in 2024 after the growth significant of +0.8% during the previous year.

The French economy is expected to grow further in 2025: +0.1% in volume compared to 2024. The increase in inflation is expected to slow to around +1.0%. At the same time, the unemployment rate is expected to be limited to 7.6%.

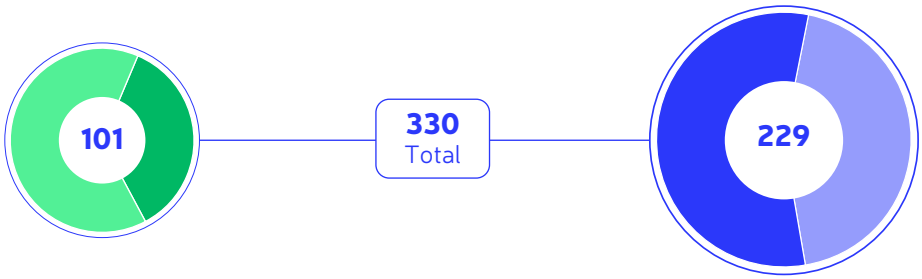
The turnover of the foundry industries decreased in 2024, and production also decreased. In total, ferrous and non-ferrous metal foundries produced 1.423 million tons in 2024 compared to 1.524 million tons in 2023. The activity of all foundry industries, all sectors combined, decreased in 2024 (-6.6% compared to 2023). In 2024, the analysis by category shows that the ferrous metal foundry activity recorded a decrease of -7.1% in volume while the production of non-ferrous metal foundries decreased by -5.0%. For both categories of activity, total production decreased by -6.6% in 2024. The total value of the production of the foundry industries is estimated at 5.7 billion euros in 2024. The drop in the foundry turnover is thus -5.4% in 2024 compared to 2023 with also a drop in production in volume. The number of employees is estimated at 28,507 at the end of December 2024. The workforce in the French foundry sector has thus decreased slightly in 2024. The number of companies in the foundry sector is 330 in 2024 (<10 people included).

Highlights France

Number of foundries

Ferrous foundries

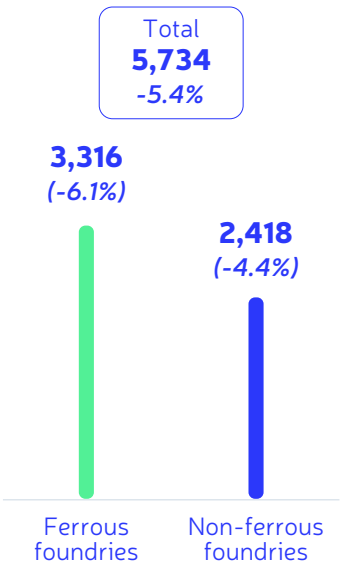
Non-ferrous foundries



- **65** Iron foundries
- **36** Steel foundries
- **128** Light and ultralight castings foundries
- **101** Other non-ferrous castings foundries

Production value

(million euros and % change 2024 vs. 2023)

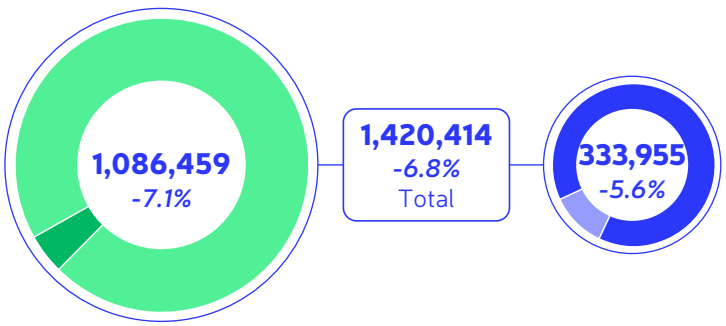


Production

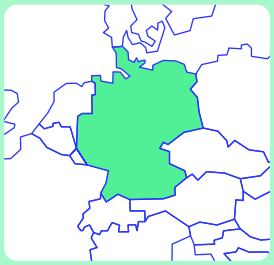
(tons and % change 2024 vs. 2023)

Ferrous castings

Non-ferrous castings



- **1,038,377** Iron castings ↘ -7.3%
- **48,082** Steel castings ↘ -2.6%
- **297,296** Light and ultralight castings ↘ -5.4%
- **36,659** Other non-ferrous castings ↘ -6.9%



CAPITAL
Berlin

POPULATION IN 2024
84.863 Million

GDP IN 2024 (CURRENT PRICES)
€ 4,305 Billion
(-0.2% vs. 2023)

GDP PER CAPITA IN 2024
€ 50,820

UNEMPLOYMENT RATE (2024)
3.4%

CONSUMER PRICE (2024 VS. 2023)
2.5%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Germany

The German foundry industry in 2024

In 2024, the German foundry industry experienced one of the most difficult years in its recent history. Total casting production fell by 12.9% to 3.41 million tons, reflecting sharp declines of 15.2% in iron and steel foundries and 4.4% in non-ferrous foundries. Despite structural shifts towards lightweight materials, both segments recorded almost identical double-digit losses in turnover. Industry revenue decreased by 12.1% to 12.27 billion EUR.

The downturn intensified over the course of the year, with a particularly weak fourth quarter (-18% year-on-year). Overall, production in 2024 stood almost 30% below the 2018 level, highlighting the depth of the downturn. The industry consists of around 550 companies employing 70,000 people. Average capacity utilisation reached only 72.7%, far below the long-term average of 81%.

The political environment added significant uncertainty. The federal government remained in a months-long stalemate and ultimately collapsed in autumn 2024. Prolonged political uncertainty prevented the implementation of long-planned reforms to reduce energy costs, ease bureaucratic burdens and strengthen investment incentives. Confidence in the industrial policy framework eroded further, and the ifo business climate for the foundry industry reached its historical low in October 2024. The current crisis is comparable only to the downturns following German reunification, the global financial crisis and the pandemic. Yet unlike those earlier shocks, it represents a structural break rather than a temporary disruption.

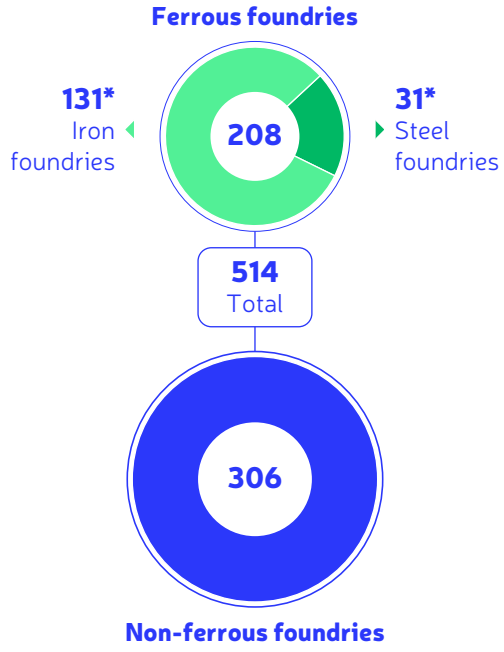
Germany's economy contracted slightly for the second consecutive year, while industrial output remained roughly 13% below its 2018 peak. High energy costs, complex regulation and political uncertainty slowed investment and weighed heavily on domestic demand. These factors directly hit foundries through weaker orders from key customer industries such as automotive and machinery manufacturing.

For the foundry sector, 2024 was marked by historically low order volumes, declining capacity utilisation and weak confidence. Nearly four out of five foundries cited a lack of orders as the main obstacle to production. Hopes for a cyclical recovery did not materialise. Although expectations stabilised slightly at year-end, the overall sentiment remained deeply pessimistic.

As a core supplier to almost all major industrial value chains, the foundry sector reflects the condition of Germany's industrial base. Investment restraint, regulatory uncertainty and persistently high energy costs have limited modernisation efforts and eroded competitiveness. 2024 will be remembered as a year of structural crisis and political uncertainty – one that highlighted the ongoing challenges for Germany's industrial foundation and the need for a stable, forward-looking industrial policy.

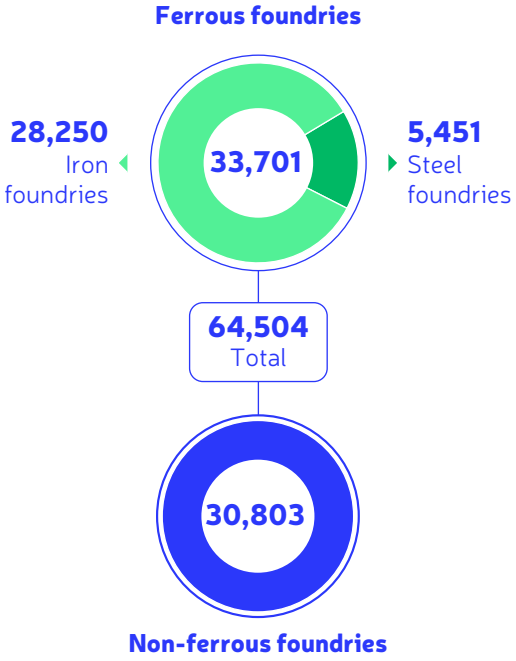
Highlights Germany

Number of foundries



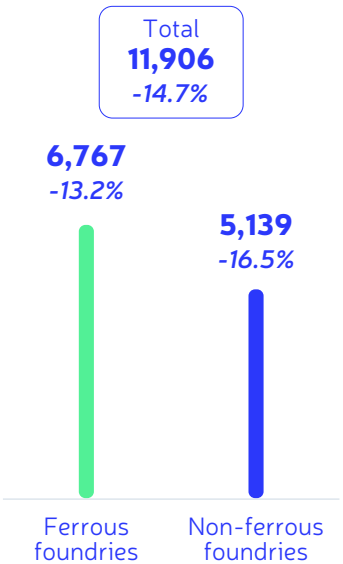
*>50 employees

Number of employees



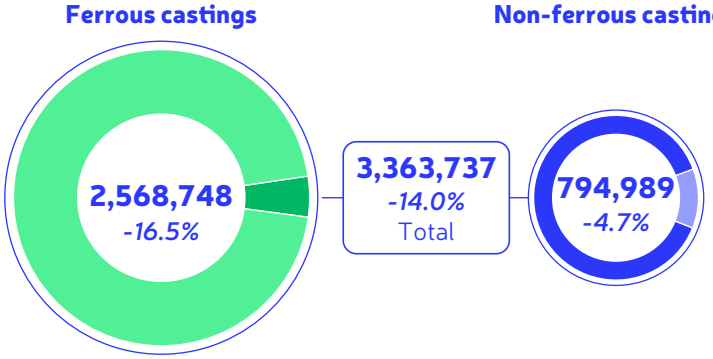
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



2,455,809 Iron castings ↘ -16.5%

112,939 Steel castings ↘ -17.4%

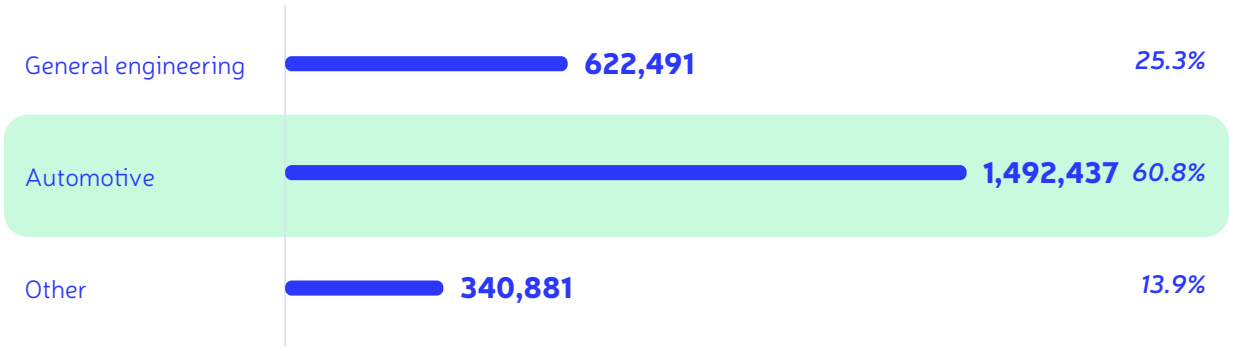
702,607 Light and ultralight castings ↘ -5.1%

92,382 Other non-ferrous castings ↘ -1.6%

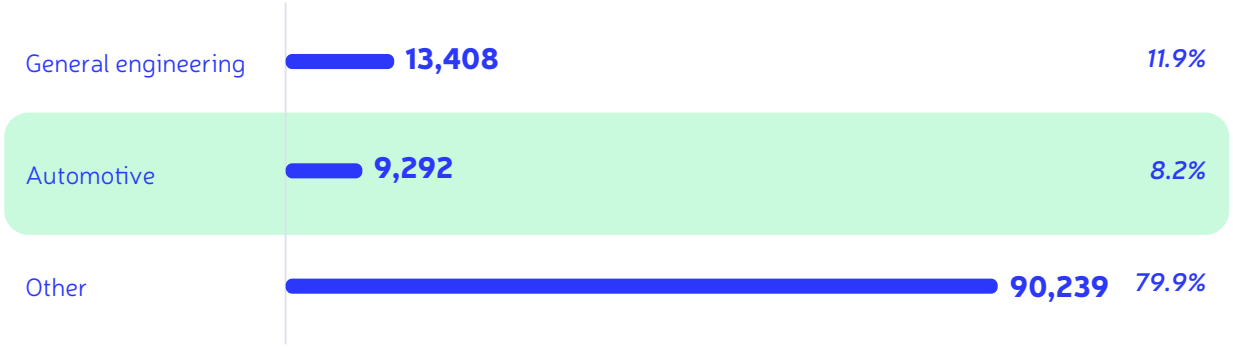
Highlights Germany

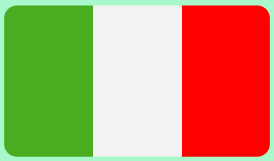
Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

IRON CASTINGS



STEEL CASTINGS





CAPITAL
Rome

POPULATION IN 2024
58.963 Million

GDP IN 2024 (CURRENT PRICES)
€ 2,192 Billion
(+0.7% vs. 2023)

GDP PER CAPITA IN 2024
€ 37,174

UNEMPLOYMENT RATE (2024)
6.6%

CONSUMER PRICE (2024 VS. 2023)
1.1%

Source of data: ISTAT – Istituto Nazionale di Statistica

Italy

The Italian foundry industry in 2024

In 2024, foundry production stood at around 1.6 million tons, a decrease of 12.3% compared to the previous year. Turnover decreased even more sharply (-12.8%), due to both lower production volumes, which reduced quantities sold, and strong downward pressure on prices, which further squeezed margins.
The causes of this complex situation are manifold. Over the past three years, the sector has faced an unstable global environment, marked by geopolitical conflicts, an energy crisis, and supply chain disruptions. Sanctions on Russian supplies have limited access to pig iron, forcing companies to seek more distant—and often less competitive—sources. Finally, uncertainties surrounding the future of the European Green Deal and the protectionist rhetoric that characterized Donald Trump's campaign in the U.S., who was later elected president, weighed on global markets, paralyzing investments.
On top of this, energy costs remained particularly high: the gap between Italian prices and those of other major European countries (not to mention the United States) widened further, creating a competitiveness deficit that is extremely difficult to bridge. In 2024, the average wholesale electricity price in Italy was €108.52, corresponding to +38% compared to Germany, +87% compared to France, and +72% compared to Spain.
Italy's 157 ferrous foundries produced about 856,000 tons of castings in 2024, down 17.2% from 2023. Turnover fell by 19.2%, to around €2.2 billion. Ferrous castings accounted for 52% of total Italian volumes.

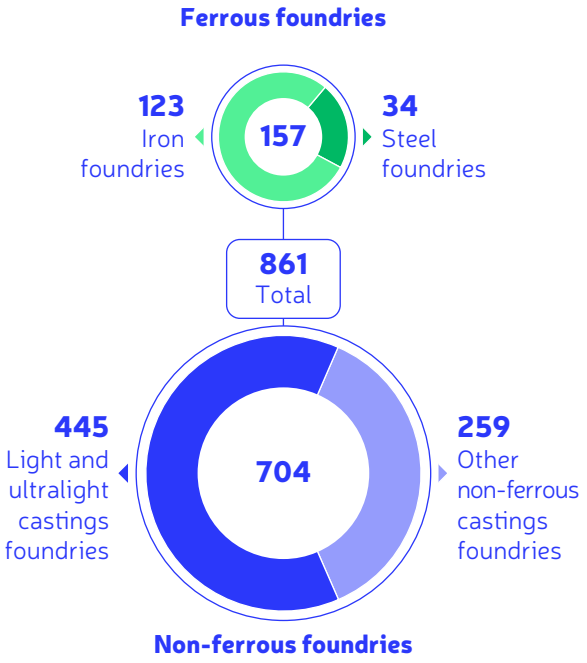
Iron casting output contracted by 16.8%, to slightly above 808,000 tons, while turnover fell by 20.3%. Gray iron accounted for 66.6% of production (537,591 tons), with a 12% decrease compared to 2023. Ductile iron, on the other hand, made up the remaining 33.4% of output and declined more sharply (-25%), reflecting weaker demand from mechanical engineering, machine tools, earthmoving, agricultural machinery, and energy equipment. The mechanical sector remains the main outlet (46% of the total, equal to 371,507 tons) but production for this segment dropped significantly: -27.5% compared to 2023.

2024 was particularly difficult for steel foundries: production fell below 50,000 tons (-21% year-on-year). Turnover also decreased, though less sharply (-16%). Alloy steels (28,190 tons, -22%) remain the largest share (58.5%); stainless (9,011 tons, -17.6%) hold 18.7%; carbon steels (10,987 tons, -19.6%) 22.8%. The mechanical sector absorbed 61.3% of total output, despite a 15.5% reduction compared to 2023.

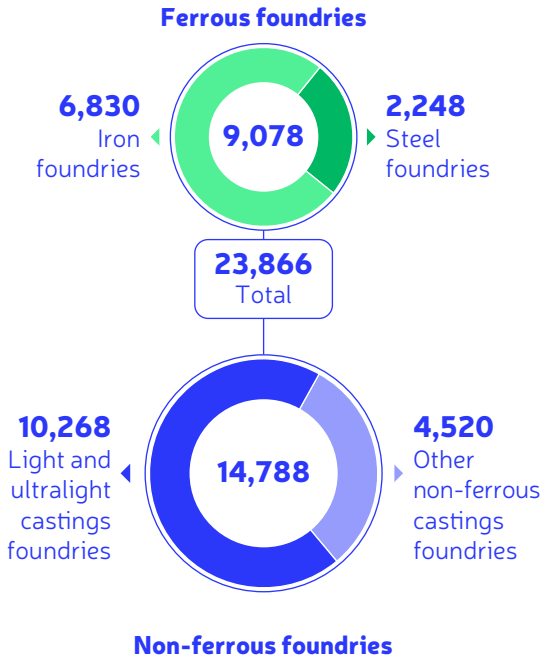
Non-ferrous foundries performed better than the ferrous ones, though still declining. Production fell by 6.1% to 777,461 tons, while turnover dropped by 9.2% to €4.4 billion. Aluminium castings represented 81% of non-ferrous castings produced in Italy in 2024. Their production fell by 8.2% (-56,000 tons). Zinc recorded a positive performance of +5%, with a share of 12.5% of the total. Brass, bronze and copper alloy castings account for 6.3% and their production grew by 1.6%. Magnesium, finally, recorded a production decline of -15.5% and now represents only 0.3% of the total. The transport sector remained the primary market for non-ferrous castings (52% of the production) but dropped by 14.1% (-66,310 tons), reflecting the automotive sector's critical phase.

Highlights Italy

Number of foundries

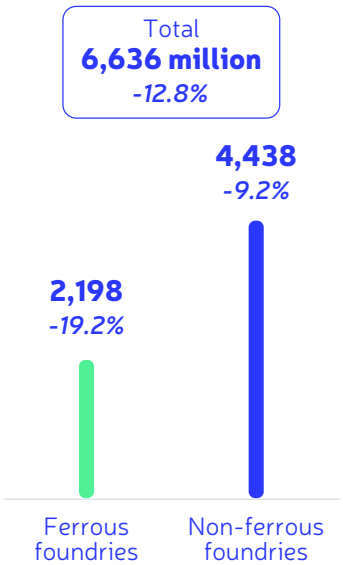


Number of employees



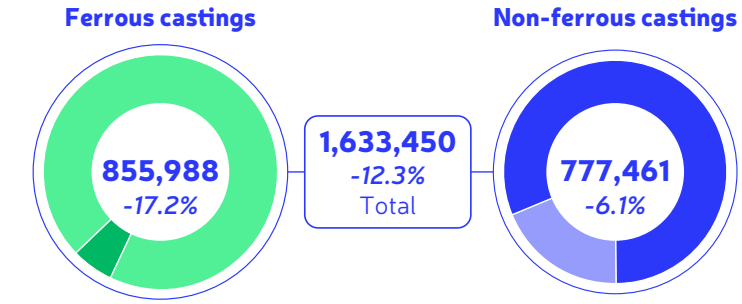
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



807,800 Iron castings ↘ -16.8%

48,188 Steel castings ↘ -20.7%

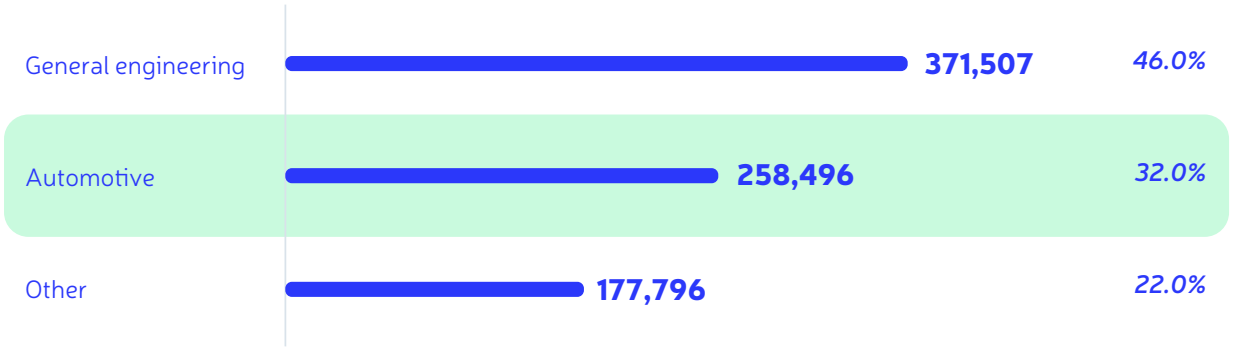
630,680 Light and ultralight castings ↘ -8.2%

146,781 Other non-ferrous castings ↗ +4.3%

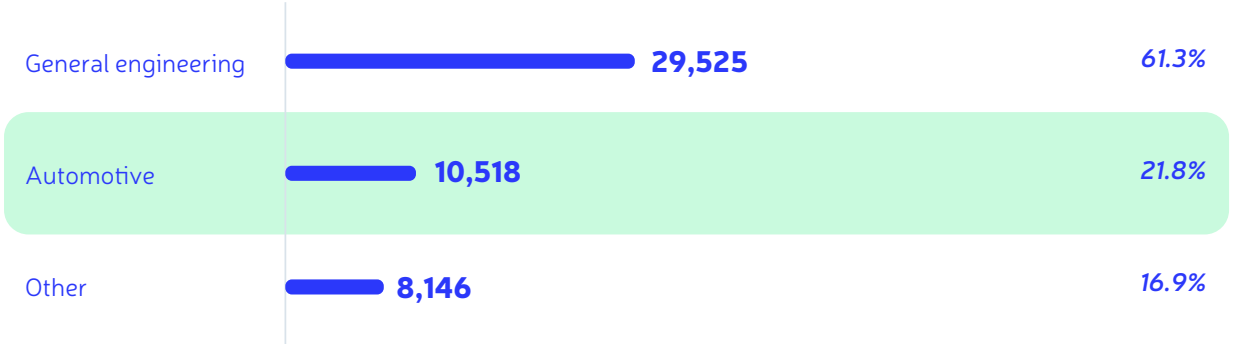
Highlights Italy

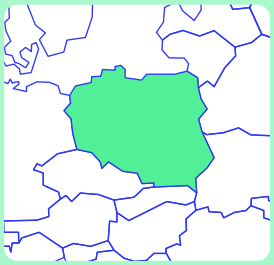
Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

IRON CASTINGS



STEEL CASTINGS





CAPITAL
Warsaw

POPULATION IN 2024
36.559 Million

GDP IN 2024 (CURRENT PRICES)
€ 854.67 Billion
(+2.9% vs. 2023)

GDP PER CAPITA IN 2024
€ 23,338

UNEMPLOYMENT RATE (2024)
2.8%

CONSUMER PRICE (2024 VS. 2023)
3.7%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Poland

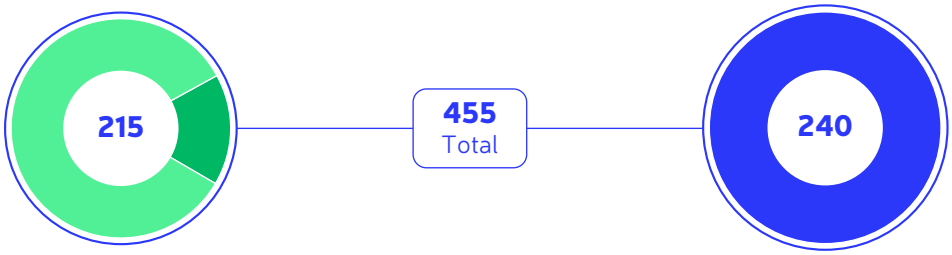
The Polish foundry industry in 2024

In 2024, the Polish economy recorded a significant recovery, with real GDP growth of 3.0 %. This growth was mainly driven by strong private consumption and an improvement in the labour market, as well as by inflows from the National Recovery Programme and the Structural Funds. GDP growth was higher than expected and stood out positively against the economies of the CEE region. According to the Central Statistical Office (GUS), average annual inflation in Poland in 2024 reached 3.6%. This is a significant slowdown compared to 2023, when the price increase was 11.4%. Registered unemployment rate in 2024 oscillated around 5%, and at the end of the year it amounted to 5.1%, The economic situation in the EU has had a significant impact on the Polish foundry industry. Over 50% of the castings produced in Poland are exported to EU countries. Shrinking consumer markets, mainly in Germany, had a key impact on the decline in production in Poland. The main recipients of Polish castings have been the following industries: automotive industry (65%), construction (9%), machinery industry (9%), iron and steel industry (7%), energy industry (3%) and others (7%). Due to the turbulent geopolitical situation, this structure may soon change, with an increasing number of foundries seeking the required certificates and concessions to become suppliers to the currently very growing arms industry. Employment in the Polish foundry industry for years has remained at an almost unchanged level of 22,000 employees.
In 2024, like in previous years, export of castings accounted for nearly 50% of total production: iron castings -55%, non-ferrous metal castings -43% and steel castings 40%. The main recipients of Polish castings are located in UE and USA.

In 2024 there were 180 cast iron foundries, 35 cast steel foundries and 240 non-ferrous metal foundries operating in Poland. Majority of companies belong to the SME sector and they are responsible for over 40% of total production. The main problems faced by Polish foundries were the decreasing number of orders, electricity costs and still insufficient supply of human resources. An additional financial burden for companies was constantly growing minimum wage. Total casting production in Poland in 2024 accounted for 667,123 tons incl. 418,612 tons of ferrous castings. Production of nonferrous casting was on a level of 248,511 tons which represented 37.2 % of total casting production. The production of castings in Poland in 2024 decreased by 11.50% in comparison to 2023.

Highlights Poland

Number of foundries



180
Iron foundries

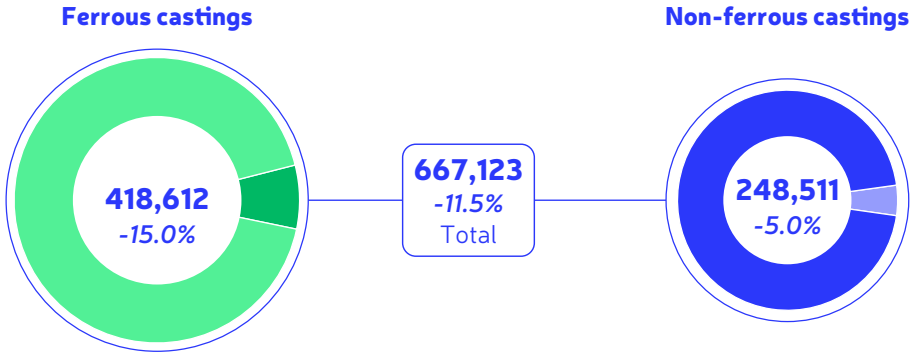
35
Steel foundries

240
Light and ultralight castings foundries

0
Other non-ferrous castings foundries

Production

(tons and % change 2024 vs. 2023)

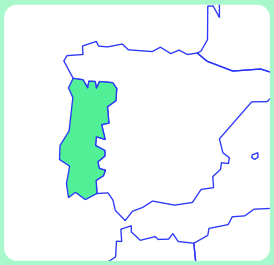


388,112 ↘ *-15.0%*
Iron castings

29,800 ↘ *-15.0%*
Steel castings

237,500 ↘ *-5.0%*
Light and ultralight castings

11,011 ↘ *-5.1%*
Other non-ferrous castings



CAPITAL
Lisbon

POPULATION IN 2024
10.714 Million

GDP IN 2024 (CURRENT PRICES)
€ 285.19 Billion
(+1.9% vs. 2023)

GDP PER CAPITA IN 2024
€ 26,725

UNEMPLOYMENT RATE (2024)
6.5%

CONSUMER PRICE (2024 VS. 2023)
2.7%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Portugal

The Portuguese foundry industry in 2024

In 2024, the active population in Portugal amounted to 5,463.4 thousand people and the employed population was estimated at 5,112.3 thousand people. The unemployment rate reached in 2024, 6.4% of the active population. In the foundry area, the demand for skilled technicians, operators and maintenance staff has been increasing every year. Companies have difficulties in attracting talent and keeping it in their organisations.
The automotive industry remains the main customer market, which absorbs about 73% of the Portuguese global production of foundry products. The Portuguese foundry sector exports 85% of the total production (by weight) mainly to the European market.
In 2024, the outcome of the Portuguese foundry industry was roughly 170 thousand tons, 121 thousand tons from the ferrous sector and 49 thousand tons from the non-ferrous sector. Which means an increase of 1.0% for the ferrous sector and a decrease of 2.6% for non-ferrous sector.

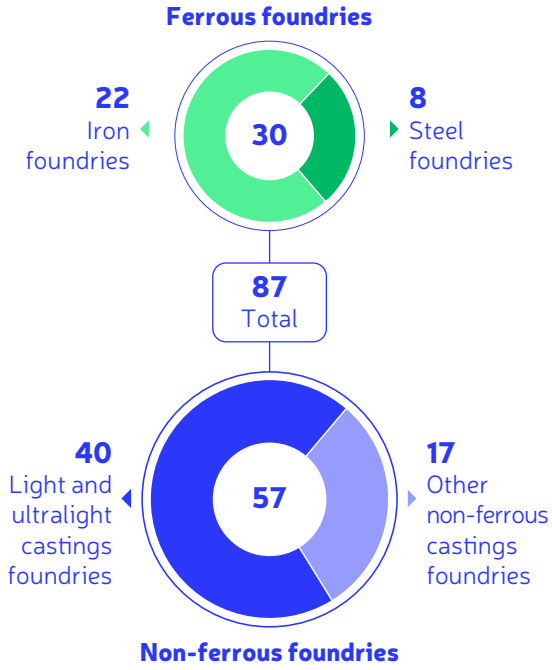
In 2024, sales decreased 13.7% for ferrous and 1.0% for non-ferrous, which means an average decreased of 6.8% compared to the previous year. The values for the ferrous sector experienced decrease in steel production, a slight increase in nodular subsector and an increase of 3.6% in iron subsector, which was reflected in a global increase in the ferrous sector of 1.0% against 2023.
The no-ferrous sector decreased by 4.6% in light casting subsector, increased by 2.2% in copper subsector and by slight 0.2% in zinc subsector, which was reflected in a global decrease in the non-ferrous sector of 2.6% against 2023.

In 2024, no new foundries were installed in Portugal, although there were several investments in existing foundries, aiming at process improvement. Global investments in the non-ferrous sector during 2024 were around 14M€, mainly in aluminium foundries. In 2025, investments are estimated to reach the amount of 15M€. Overall investments in the ferrous sector in 2024 were around 15M€, carried out mainly by iron foundries. In 2025, planned investments are expected to reach a total amount of 16M€. In 2024, annual electricity market prices fell, mostly below €80/MWh. The fall in gas prices, combined with the reduction in demand and the increase in renewable generation compared to 2024, led to a decrease in prices in the electricity markets. During 2024, installed solar and wind energy increased in most markets, thus favouring the increase in production with these technologies. In 2024, renewable production reached its highest level ever in the Portuguese electricity system, having supplied 71% of electricity consumption.

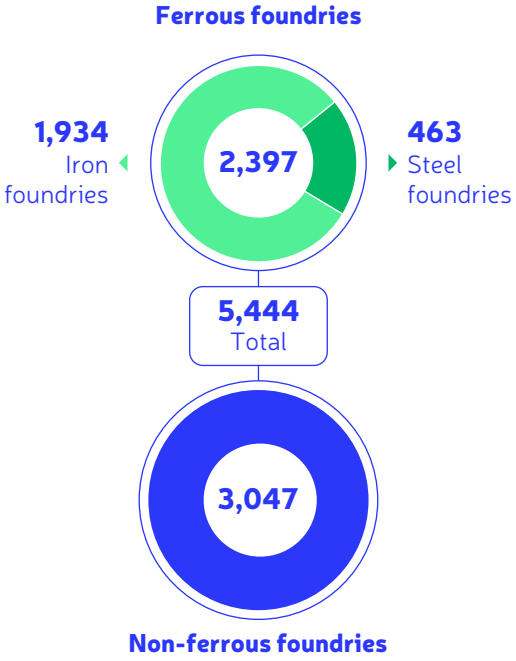
Globally, the needs of the automotive sector had an increase in 2024. This increase was reflected in the ferrous sector, where there was an increase in production output for this sector from 121 001 Ton in 2023 to 121 579 Ton in 2024. However, this increase was not reflected in billing values, which fall from M€295 in 2023 to 255M€ in 2024. In Portugal, the global billing values fall from 653M€ in 2023 to 609M€ in 2024.
The Portuguese Foundry Industry has its own Professional Training Centre, CINFU, in a partnership between APF - Portuguese Foundry Association and the Institute for Employment and Professional Training. CINFU promotes professional training for the workers of the sector and for those who will join it in the future. There is also a long partnership with the University of Porto - Faculty of Engineering, for the training of future foundry engineers.

Highlights Portugal

Number of foundries

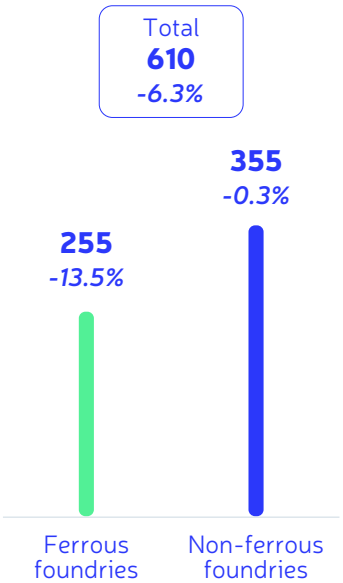


Number of employees



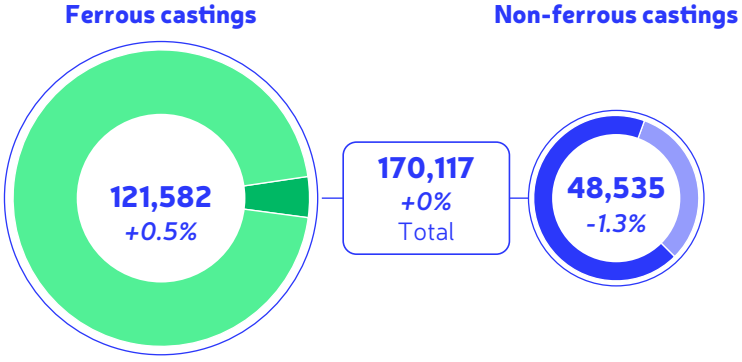
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



117,725 Iron castings *+1.6%*

32,738 Light and ultralight castings *-2.8%*

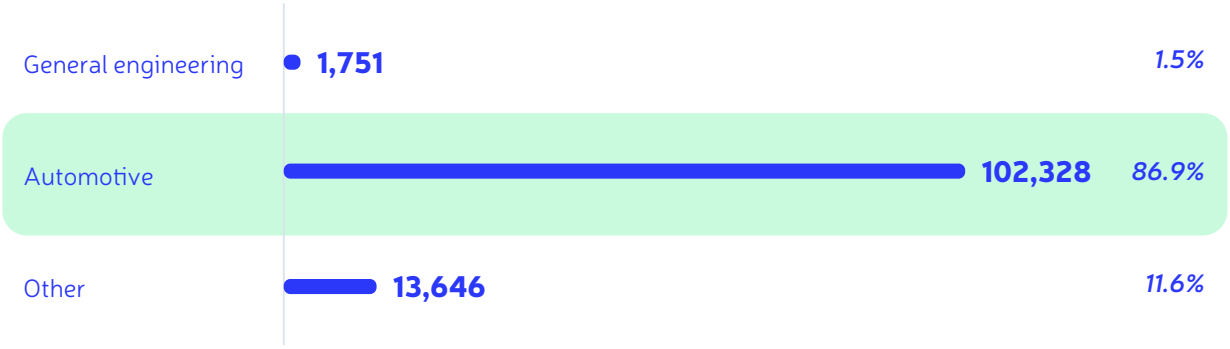
3,857 Steel castings *-24.2%*

15,797 Other non-ferrous castings *+1,9%*

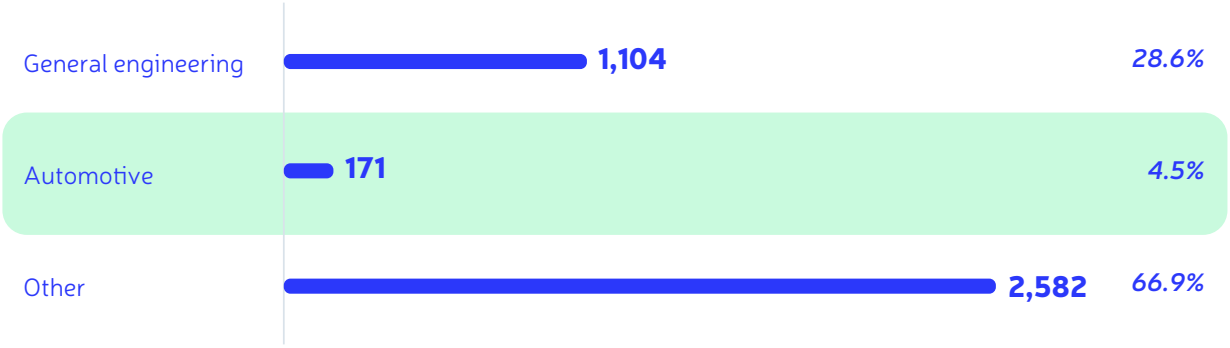
Highlights Portugal

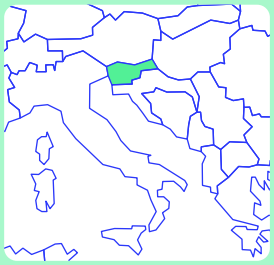
Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

IRON CASTINGS



STEEL CASTINGS





CAPITAL
Ljubljana

POPULATION IN 2024
2.129 Million

GDP IN 2024 (CURRENT PRICES)
€ 66.97 Billion
(+1.6% vs. 2023)

GDP PER CAPITA IN 2024
€ 31,530

UNEMPLOYMENT RATE (2024)
3.7%

CONSUMER PRICE (2024 VS. 2023)
1.9%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Slovenia

The Slovenian foundry industry in 2024

Economic growth in Slovenia is expected to accelerate to 2.1% this year, slightly below expectations from autumn 2024. Growth in goods export will be somewhat lower this year after last year's strong performance, which weakened significantly in the fourth quarter, and will largely align with the growth in foreign demand. Growth in services exports is expected to accelerate further. Domestic consumption will be a key driver of GDP growth this year, in particular continued growth in private consumption, supported by rising wages and social transfers, as well as a recovery in investment following last year's decline. Growth in household consumption will drive turnover in trade and in tourism and leisure-related services, further boosted by the continued rise in consumption by foreign tourists. Government investment activity will increase, supported by the funds from the Recovery and Resilience Plan (RRP) and the Fund for the Reconstruction of Slovenia, established in response to the 2023 floods. However, uncertainty and weak economic recovery among Slovenia's trading partners will lead to cautious investment decisions, particularly in exportoriented sectors. Some impetus will come from lower interest rates, which will have an impact on housing investment in particular, albeit more in the medium term. In 2025, government consumption growth is expected to moderate to 2.7%, compared to last year. As in 2024, the ongoing recovery from floods is expected to impact growth in general government spending on goods and services, not just on investment. Additionally, the first effects of the new long term care benefits, implemented in mid-2025, are expected to start emerging.

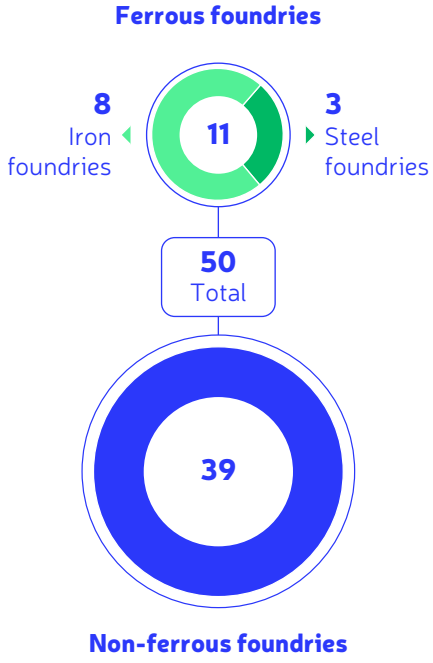
However, economic growth could exceed expectations in the baseline scenario if workforce attraction efforts are more successful and EU funds are absorbed more efficiently in conjunction with reform measures

The total production of the Slovenian foundry industry in 2024 was 150,665, which is further decrease of 10% compared to the 168,253 tons produced in 2023. Business conditions have deteriorated significantly due to necessary market restructuring, a decline in demand and fewer orders, and unacceptably high electricity prices. These factors are seriously jeopardizing the future of all foundries. The production of grey cast iron amounted to 43,020 tons, which is 17% less than last year. The production of ductile iron amounted to 34,478 tons, which is 6% less than last year. The production of steel totaled 4,133 tons, which is 30% less than last year. The production of copper alloys totaled 922 tons, which is down by 12% from last year. The production of zinc alloys totaled 4,946 tons, which is down by 3% from last year. The production of aluminum alloys totaled 56,680 tons, which is down by 2% from last year. The production of malleable iron was the only positive or growing production in 2024, totaling 3,000 tons, compared to last year's 2,700, which is a difference of 11%. Finally, 3,486 tons of "other casting production" was reported in 2024.

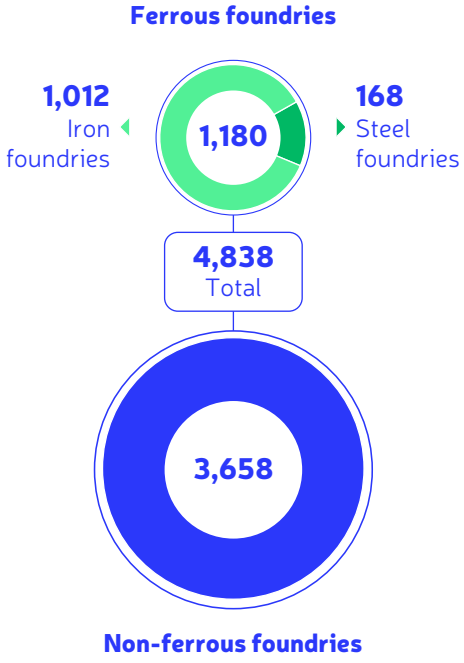
The total production value of the Slovenian foundry industry in 2024, amounted to 948,027,672 €, which is a major decrease of 8.5%, compared to last years increase of 1.8%, all of the subdivision of our foundry industry had a decrease in their production value or monetary fall.

Highlights Slovenia

Number of foundries

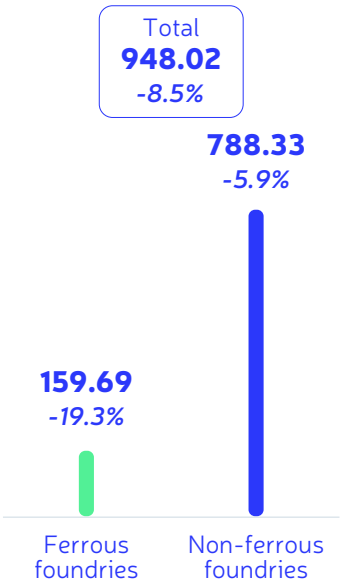


Number of employees



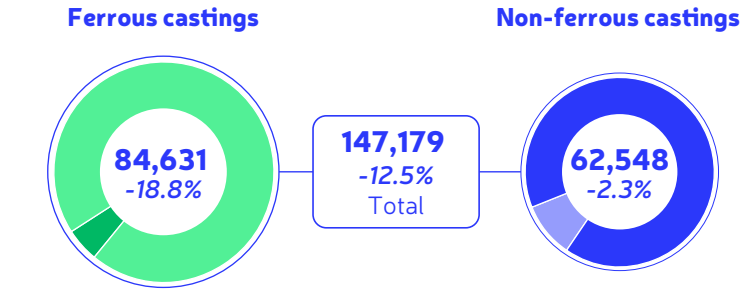
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)

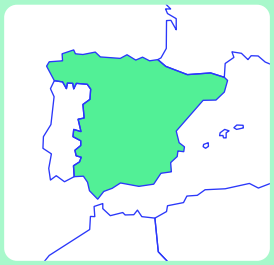


80,498 Iron castings ↘ *-18.1%*

4,133 Steel castings ↘ *-29.8%*

56,680 Light and ultralight castings ↘ *-2.1%*

5,868 Other non-ferrous castings ↘ *-4.2%*



CAPITAL
Madrid

POPULATION IN 2024
49.721 Million

GDP IN 2024 (CURRENT PRICES)
€ 1,591 Billion
(+3.2% vs. 2023)

GDP PER CAPITA IN 2024
€ 32,430

UNEMPLOYMENT RATE (2024)
11.3%

CONSUMER PRICE (2024 VS. 2023)
2.9%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Spain

The Spanish foundry industry in 2024

After 3 years in a row of increase in production of the Spanish foundry sector (+6.89% in 2021, +2.21% in 2022 and +2.44% in 2023), in 2024 the Spanish foundry production fell by 2.07%. Comparing data of the common enterprises, 2023 vs 2024 the occupancy rate decreased from 78% (2023) to 71% (2024). The orders increased from 71 to 80 days in 2024. The foundry sector employment was expected to fall by 1.09% by December 2024 and to fall by almost another point (-0.91) by June 2025.

In general, markets have behaved better in the first half, with a significant drop in the second half of 2024, especially in the automotive sector, the main customer of the foundry sector, which represents 62% of the Sector's sales. For iron foundries working for the Automotive sector was expected to fall by -9% for 2024 year. The wind sector end up with significant drops in production too. With the exception of some sub-sectors such as Stainless Steel, the falls in the second half of the year have caused occupancy levels and order books to fall sharply, which will have caused the 2024 financial year to end below the previous year, in terms of production.

In the foundry sector the level of exports is very high, with the main markets being those of the European Union and Germany as the main destination country. The weak situation of the European markets in 2024, especially Germany, has also caused exports to fall, with the greatest impact in the second half of 2024. During 2024, R&D activity has remained stable. By 2025 it is perceived an increased interest of foundry companies in R&D programs and projects. There is a lot of uncertainty for 2025. It is expected to start in a sad way and end with a bit better mood. For iron foundries working for the Automotive sector at the end of the year 2024, it was expected to fall by -9% for 2024 year. The agricultural sector is facing a difficult situation, with significant declines.

The industrial vehicle subsector has experienced a major downturn throughout the year, making it a negative period, although the final months of 2024 showed slight improvement. There are in general delays in the launch of electric vehicles projects. In general, there is concern about the high level of absenteeism.

Many foundries are concerned about the new BREF limit values, as they will need to adapt and make substantial investments. In general, 2025 is not expected to be a good year.

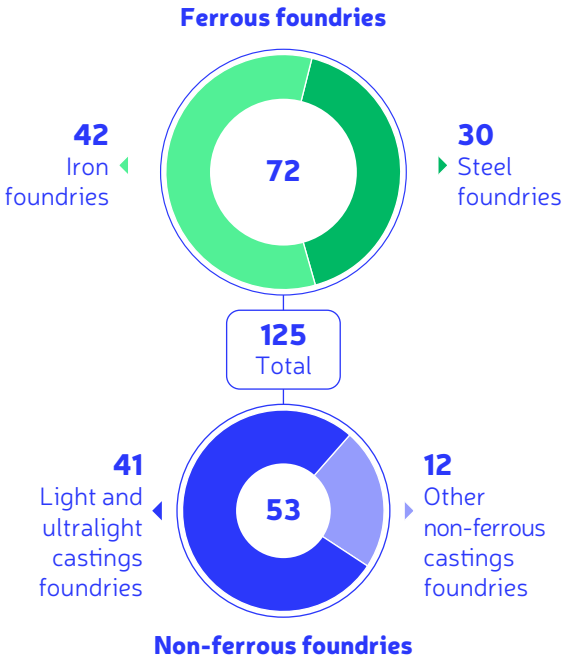
Some foundries are choosing to diversify their activity into sectors such as offshore and naval. However, in 2024, the automotive and machine tool sectors experienced declines. As for the nuclear subsector, it has performed poorly over the past ten years, as it is a very slow-moving market.

Looking ahead to 2025, there is a general sense of uncertainty, although the expectation is at least to maintain current levels; much will depend on whether some of the pending projects are finally launched. The beginning of the year is expected to be weaker, with a more positive outlook towards the end of 2025. Both the naval and Oil & Gas sectors are expected to have a good year in 2025, and in the case of the naval sector, 2026 also looks promising. Lastly, it is noted that customer demands are increasingly high. Stainless steel foundries have had better numbers than the others during 2024.

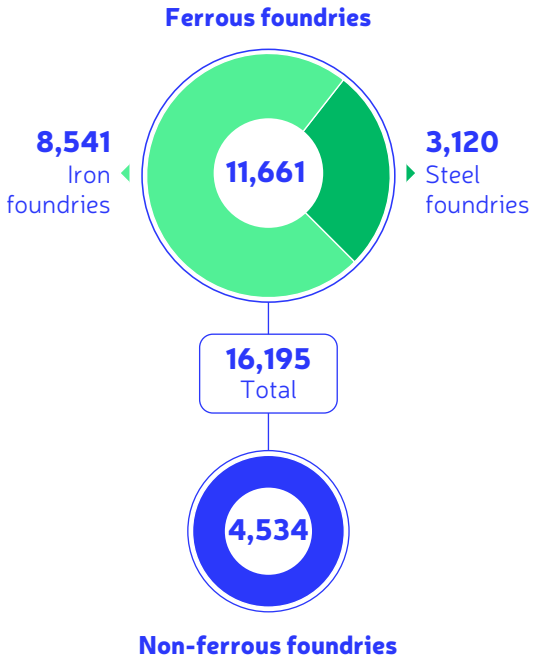
The non-ferrous metals subsector has shown the greatest dynamism, recording a 1.3% increase in employment, a 1.1% rise in turnover, and a 2.2% growth in exports, even though production experienced a slight decline of 1.2%. Aluminium foundries have produced less than in 2023. Zamak, for its part, has also seen a decline in terms of production and exported tonnage.

Highlights Spain

Number of foundries

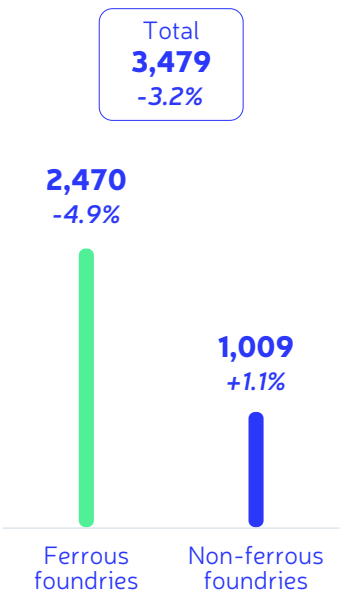


Number of employees



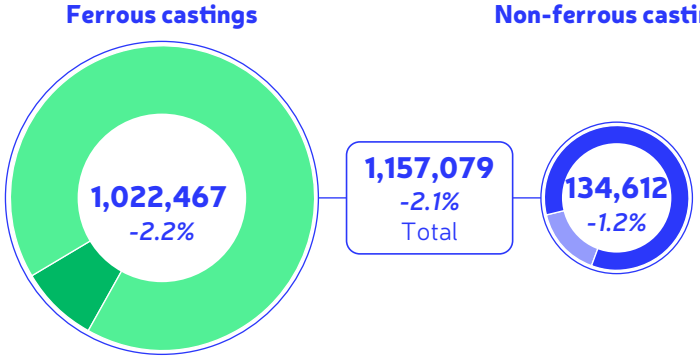
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



937,517 Iron castings ↘ -2.4%

84,950 Steel castings ↗ +0.3%

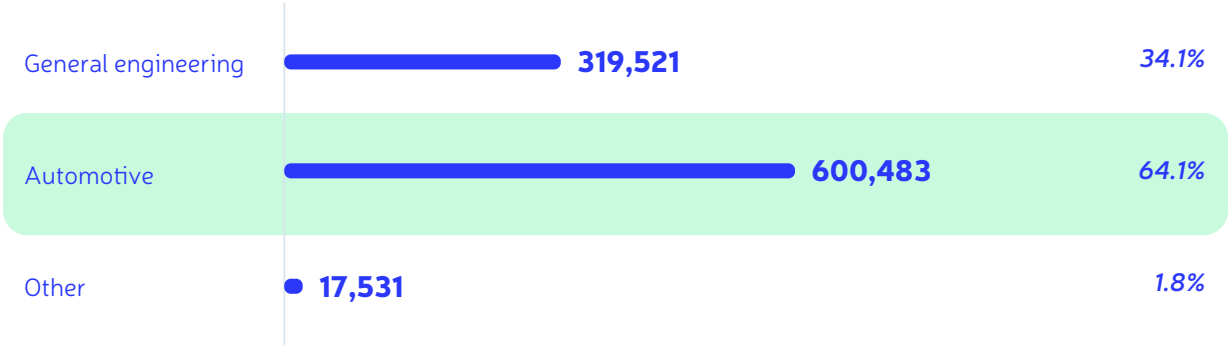
113,643 Light and ultralight castings ↘ -0,9%

20,969 Other non-ferrous castings ↘ -3.2%

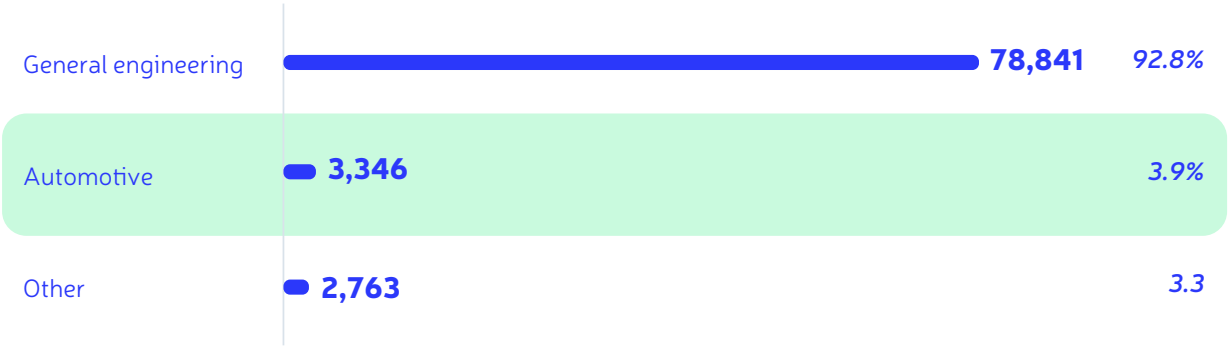
Highlights Spain

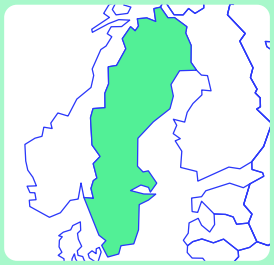
Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

IRON CASTINGS



STEEL CASTINGS





CAPITAL
Stockholm

POPULATION IN 2024
10.587 Million

GDP IN 2024 (CURRENT PRICES)
€ 520.48 Billion
(+1.0% vs. 2023)

GDP PER CAPITA IN 2024
€ 55,388

UNEMPLOYMENT RATE (2024)
8.4%

CONSUMER PRICE (2024 VS. 2023)
2.0%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Sweden

The Swedish foundry industry in 2024

The Swedish foundry industry remains an essential part of the national manufacturing fabric, providing critical components to a range of sectors. With approximately 100 active foundries, a strong emphasis on technological development, sustainability, and collaboration, the industry is strategically positioned for the challenges of tomorrow.

The year 2024 continued to be shaped by macroeconomic uncertainty in Sweden. Inflation, though easing from the very high levels of 2022–2023, remained above the Riksbank's target of 2%. The Consumer Price Index (CPI) saw a slower pace of increase, but households continued to feel the pressure from high borrowing costs and rising living expenses.

Unemployment held at relatively elevated levels, around 7.5%, with variation across sectors. The industrial sector, including foundries, generally fared better than many service segments, but capital investments remained cautious. During the autumn, the Riksbank began signaling the possibility of interest rate cuts in 2025.

The Swedish foundy industry comprises around 100 foundries. Employment across the sector is about 6,000 people. In 2024 demand was mixed across customer sectors. The automotive industry maintained a degree of stability, though consumer-level headwinds constrained broader growth. At the same time, sectors involved in energy and machinery saw continuing needs for cast components. Production volumes did not reach the levels of the peak years but remained acceptable for many actors.

Some foundries used the more cautious environment to invest in modernization, energy efficiency upgrades, and sustainability measures moves aimed at long-term competitiveness despite short-term pressures.

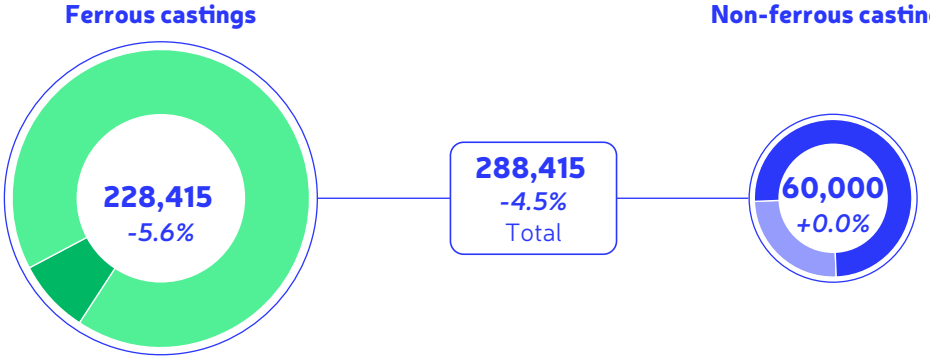
The Swedish foundry industry continues to face a number of challenges. Demand volatility and fluctuating order volumes create uncertainty for many companies, making it difficult to plan production and investments effectively. Although electricity prices eased compared to the previous two years, regional variations and long-term capacity concerns remained an issue for this energy-intensive sector. At the same time, rising raw material costs, price fluctuations and lead times still pose challenges despite supply chains having largely stabilized since the disruptions of recent years. Another key challenge is the recruitment and retention of skilled technical personnel, as many foundries struggle to attract younger generations to the profession. In addition, the industry must continue to adapt to increasingly stringent environmental and climate regulations, which require continuous investments in cleaner technologies and more sustainable production methods.

Opportunities for the future arise in several areas. Continued progress in automation, digitalization, and process innovation offers significant potential to strengthen competitiveness and improve efficiency across Swedish foundries. Sweden's relatively clean electricity mix and strong national commitment to sustainability also provide a strategic advantage for industrial customers seeking to reduce their carbon footprints. At the same time, the ongoing reorganization of global supply chains and the trend toward more regional production are creating favourable conditions for domestic manufacturing. Increased collaboration in research and development, as well as initiatives focused on circularity and the reuse of materials, open possibilities for entirely new value chains.

Highlights Sweden

Production

(tons and % change 2024 vs. 2023)



210,115 -4.5%
Iron castings

18,300 -16.4%
Steel castings

45,000 -6.3%
Light and ultralight castings

15,000 +25%
Other non-ferrous castings

CAPITAL
Bern

POPULATION IN 2024
9.029 Million

GDP IN 2024 (CURRENT PRICES)
€ 891.81 Billion
(+1.3% vs. 2023)

GDP PER CAPITA IN 2024
€ 99,509

UNEMPLOYMENT RATE (2024)
2.5%

CONSUMER PRICE (2024 VS. 2023)
1.1%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Switzerland

The Swiss foundry industry in 2024

The year 2024 proved particularly challenging for the Swiss foundry industry. Altogether, the volatile demand situation in the 46 member-firms of the Swiss Foundry Association (GVS) led to a severe downturn. Production output, as measured in tons delivered, showed an overall decline of 13.6% from the year before. In 2025 as well, the industry association foresees scant improvement in incoming orders and production volume since the prior year, as a result of continuing low demand from the central user markets.

In the course of 2024, economic conditions deteriorated severely and the unpredictability of the market forced Swiss foundries to adopt even briefer development and production cycles than before. A number of new, sustainable "made in Switzerland" casting solutions were adopted. The challenging market conditions, however, adversely impacted the opportunity for strong earnings.

In the general field of machine construction, numerous clients of the Swiss foundries encountered an extreme downturn in demand since the middle of last year. Scarcely any new business could be contracted as a result. This was due especially to the economic weakness of Switzerland's greatest export market, Germany. Owing to the limited sales of electric automobiles, orders for Swiss light metal foundries from manufacturers in Germany and all of Europe decreased once again, remaining far below estimates. Business activity in this automotive field, which is so important for the Swiss foundry industry, also suffered from the short-term savings programs and unreliable order retrievals of German producers.

On the other hand, the demand climate from the rail vehicle industry remained stable at a satisfactory level, with renewed growth rates. In the construction sector, the lengthy regulatory processes and the prevailing shortages of skilled workers had an adverse economic impact. Fewer construction and renovation projects were completed in 2024 than originally estimated. For all construction materials across the board, production volume declined by 13.6% to a total delivery tonnage of 34,685, compared with 41,006 tons in the preceding year. Production in light-metal and nonferrous casting decreased by 14% in 2024, while iron casting reported a reduction of 13.3%.

According to a survey among GVS executives, initial incoming orders for the development of new casting parts encouraged optimism among leading companies in the sector with respect to an economic recovery in 2025, or at least promising indicators. Slight improvement was noted as early as late in 2024, causing further rises in utilization levels for the first quarter of 2025. Thanks to long-term project schedules, the rail vehicle market remained a reliable stabilizing factor.

Geopolitical developments such as an end to the Russia-Ukraine war and the conflict in the Near East could be expected to increase the demand for casting parts for infrastructure reconstruction. In the current year we do not yet foresee a clear improvement for the Swiss foundry industry, since that would depend primarily on a recovery in the main export markets, Germany and all of Europe.

numbers

34,685

tonnes

The total volume of castings produced by Swiss foundries in 2024

Our strengths and weaknesses are determined by our target markets. Just as we, as suppliers, profited from the surge in the past, so do we suffer now from the downturn in the automotive industry. Rising exports of Chinese electric vehicles to Europe, and possible disadvantageous resolutions in the USA, further lower our expectations. Withdrawal, however, is not considered an option. We are convinced that technological trends such as E-mobility and lightweight construction will be decisive factors in our industry. Increased adoption of light-metal casting parts throughout the transport sector and also in the machine construction industry will lead to increased demand in the medium to long term. In Germany and throughout Europe, as well as in North America, it can be expected that the process of recovery will be slower than in Asia.

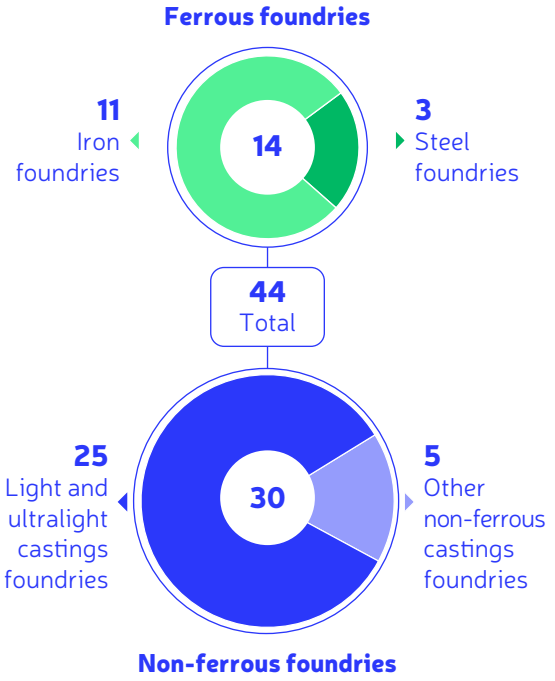
Despite the significantly disproportionate competitive conditions and the intense price war with European and Asian suppliers, the chief market factor, we believe, is stability: an advantage that we in Switzerland can reliably guarantee in every respect—political, economic and qualitative.

Swiss foundries face an uncertain variable in the new CO2 law, which has potential consequences for industry that are as yet difficult to foresee. In addition, the numerous reporting obligations, including CO2 reporting and various compliance certificates, impose a considerable administrative burden on companies that will undoubtedly require staffing increases. Although energy costs have clearly diminished, Switzerland is still considered to labor under a disadvantage in European competition, especially owing to higher-than-average network costs and taxes.

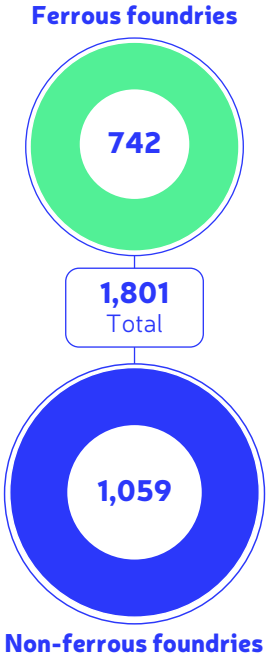
Along with these high costs, the specialized staffing shortage and strong Swiss franc pose the greatest challenges for the Swiss foundry industry in the near future. Persistent economic stagnation in the Euro zone can be expected to exert further pressure on the value of the weak Euro, making exports considerably more expensive and undermining the competitive strength of the Swiss foundry industry.

Highlights Switzerland

Number of foundries

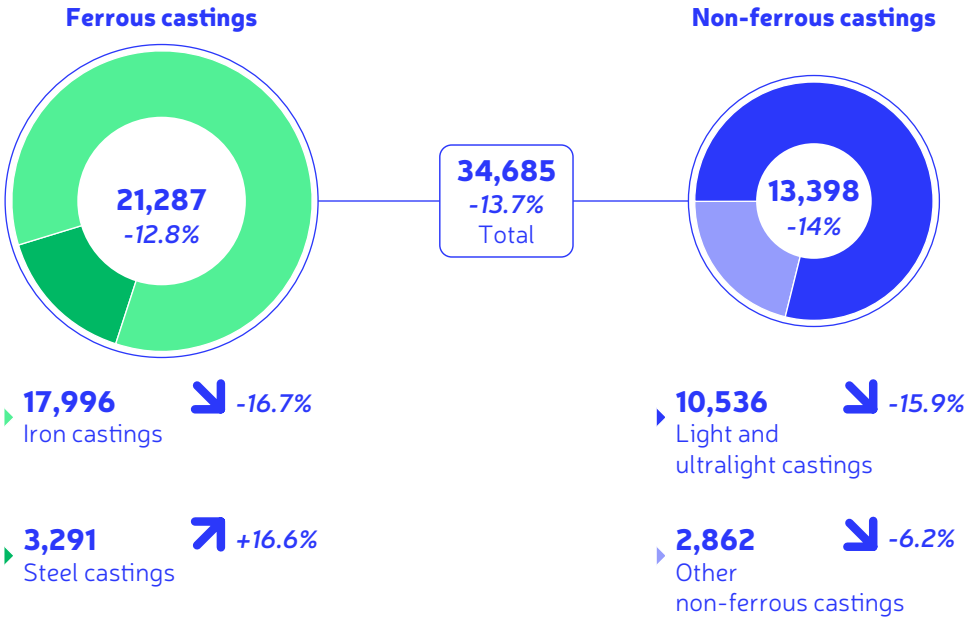


Number of employees



Production

(tons and % change 2024 vs. 2023)



CAPITAL
Ankara

POPULATION IN 2024
86.026 Million

GDP IN 2024 (CURRENT PRICES)
€ 1,140 Billion
(+3.2% vs. 2023)

GDP PER CAPITA IN 2024
€ 13,323

UNEMPLOYMENT RATE (2024)
8.7%

CONSUMER PRICE (2024 VS. 2023)
58.5%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

Türkiye

The Turkish foundry industry in 2024

The Turkish foundry industry experienced a demanding year in 2024, shaped by tightening financial conditions, global uncertainty, and rising production costs. Total output declined by 14.6% to reach 2.6 million tons, reflecting the combined effects of weaker domestic demand, reduced export orders and cautious investment behavior across customer industries.

Industrial and macroeconomic indicators remained challenging. The national manufacturing PMI remained below 50 for much of the year, indicating ongoing contraction. Although the first quarter suggested potential for recovery, the slowdown in new orders during the second half of the year prompted many foundries to adjust their production schedules and reduce shifts. Employment also decreased slightly as companies sought to balance productivity with lower workload levels while still struggling to attract skilled technical staff, which is a long-standing challenge for the industry.

From a cost perspective, inflationary pressures remained the key risk factor. Labour costs increased by 76% year-on-year in local currency, raising their share in total casting costs to nearly 30%. Raw-material prices (scrap and pig iron) rose between 22% and 32%, maintaining levels about five times higher than in 2020. Although energy tariffs (electricity and natural gas) remained relatively stable in 2024, they are still around seven times higher than in 2020 in local currency, which puts manufacturing industries at a structural cost disadvantage.

These dynamics particularly affected ferrous foundries, where grey and ductile iron production declined by roughly 20%, reducing capacity utilization to 56%. Steel castings also contracted by around 21%, mainly driven by weak foreign demand and global price competition. In contrast, non-ferrous foundries — especially aluminium die-casting (HPDC) — demonstrated strong resilience. Production increased by 2.7%, supported by ongoing demand from automotive and electrical equipment sectors, as well as new investments in high-pressure die-casting cells and automation systems.

Despite the contraction, the Turkish foundry industry continues to position itself as a technology-driven and export-oriented production base. In 2024, approximately 69% of total casting value originated from exports, confirming the sector's strong integration with European value chains.

Digitalization, process automation, and energy efficiency remain at the center of investment strategies. Foundries are increasingly adopting data-based production management, real-time quality control, and predictive maintenance systems, preparing for a more competitive environment shaped by the EU Green Deal, CBAM, and related regulations.

numbers

69%

The share of total turnover generated by exports by Turkish foundries

Looking forward, the sector's outlook for 2025 and beyond is cautiously optimistic. Domestic demand is expected to stabilize, while export recovery will depend on the pace of industrial activity in Europe. The industry's strategic priorities will include:

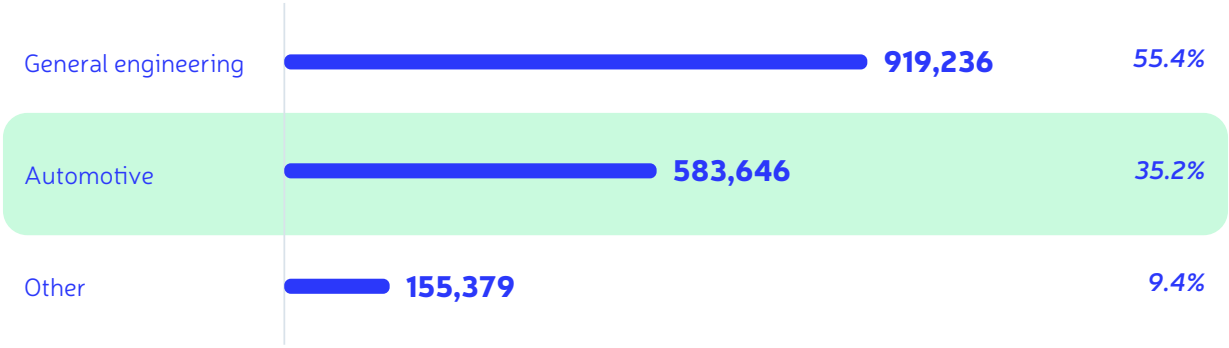
- Decarbonization and energy efficiency projects to align with the upcoming Turkish ETS framework,
- Lightweight design and alloy innovation to serve e-mobility and renewable-energy components,
- Vocational training and digital skills development, addressing workforce shortages, and
- Integration of AI-supported process control systems to increase productivity and reduce scrap.

With its strong engineering base, adaptable SMEs, and growing R&D capacity, the Turkish foundry industry has proven its resilience. While short-term headwinds persist, the long-term trajectory is clear: a shift toward greener, smarter, and more globally competitive production — ensuring that Turkey remains one of the key innovation centers of the European foundry landscape.

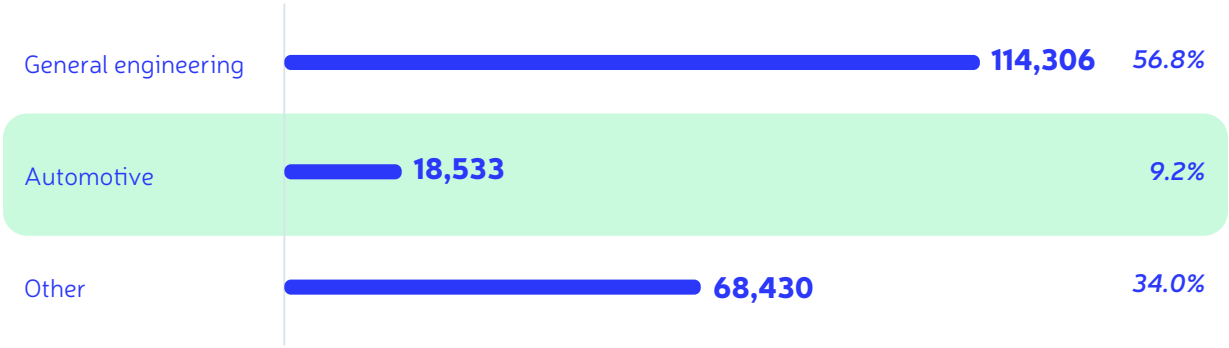
Highlights Türkiye

Ferrous castings: target markets (tons produced in 2024 and % share of total volumes)

IRON CASTINGS

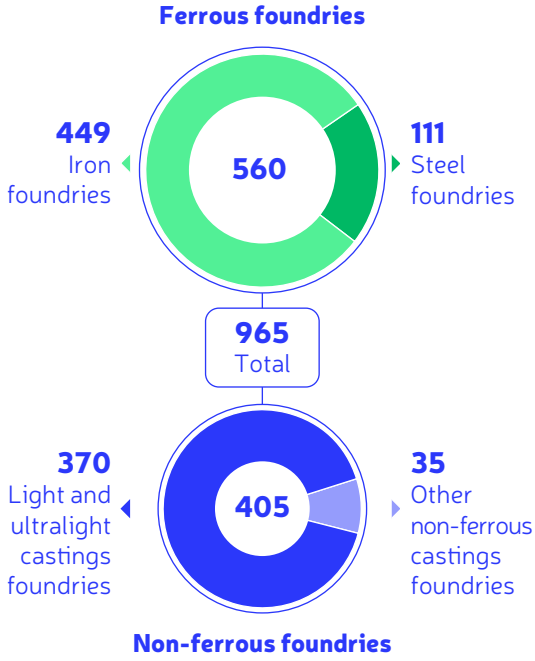


STEEL CASTINGS

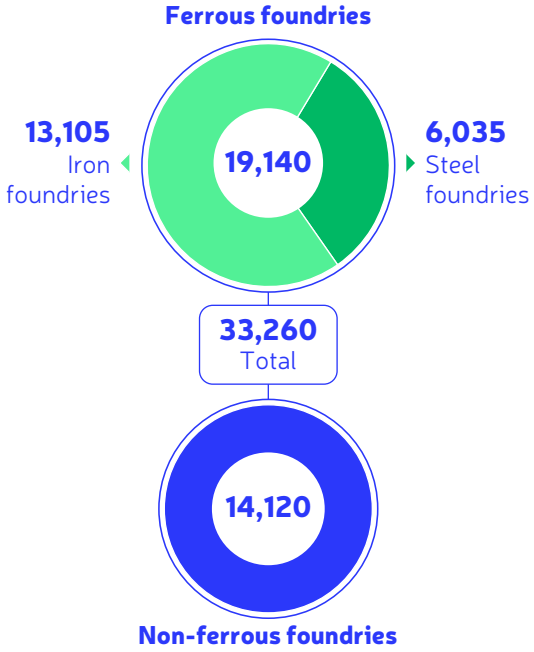


Highlights Türkiye

Number of foundries

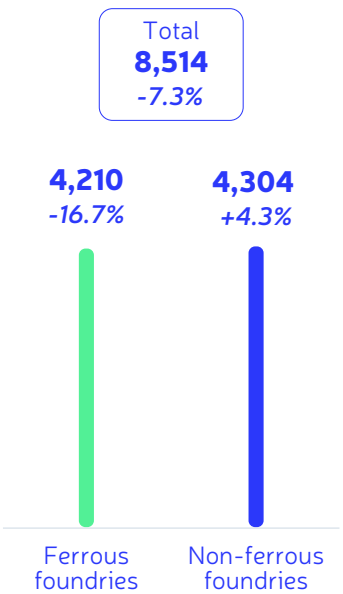


Number of employees



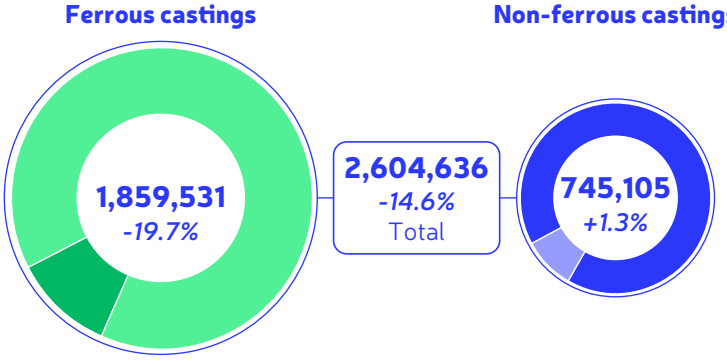
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



1,658,261 Iron castings ↘ -19.5%

201,270 Steel castings ↘ -21.2%

678,892 Light and ultralight castings ↗ +2.7%

66,213 Other non-ferrous castings ↘ -11.2%

CAPITAL
London

POPULATION IN 2024
69.868 Million

GDP IN 2024 (CURRENT PRICES)
€ 3,235 Billion
(+1.1% vs. 2023)

GDP PER CAPITA IN 2024
€ 46,740

UNEMPLOYMENT RATE (2024)
4.3%

CONSUMER PRICE (2024 VS. 2023)
2.5%

Source of data: International Monetary Fund, World Economic Outlook Database, April 2025

UK

The UK foundry industry in 2024

2024 continued where 2023 left off and showed a slightly improved picture compared with 2023 for UK foundries. As in 2023, some of the growth due to increased prices rather than increased tonnages as there were some foundry closures, although several sectors showed improvements in demand.

There were 5 foundry closures, with an additional foundry being taken out of administration by being taken over by another foundry group. The closures were of small to medium sized ferrous foundries; 3 light alloy foundries and two iron foundries. 3 of the foundries were in England, one in Wales and one in Scotland. The foundry that was taken over was a medium-sized iron company in England. No new foundries were opened.

In general, most light alloy foundries saw slight increase in work compared with 2023, but for many orders were still not at the levels of work reported before the covid-19 pandemic. Many reported plenty of enquiries, and design or prototyping work for EVs, but not all have translated into firm orders, perhaps due to a lack of business confidence. Where orders have been confirmed, there has been an increase in time seen before first volume production orders were being placed. Inconsistent order levels from passenger vehicle OEMs has also been a factor. Delays in obtaining tooling from East Asia, and then the tooling requiring repair or rectification, was also reported to be a factor, with price still being the main factor in purchasing decisions.

The steel casting sector has benefited from increased work for the defence sector, as well as from the oil and gas sector, and some continued demand from transport, specifically heavy vehicles.

For both light alloy foundries, and the investment sector more generally, the aerospace sector has seen a recovery in orders, with order for the defence, oil and gas and IGT sectors also increasing. The automotive sector has experienced a decrease in work loads as fewer components are required in full EV's and automotive sales are down, in part due to manufacturers changing their offerings, coupled with high prices for EV's and the removal of grants towards purchase costs. Fleet purchases of EV's outweighed sales of EV's to private individuals.

CMF members have reported that enquiry levels generally seem to be quite high, but within increased time for these to be converted into orders.

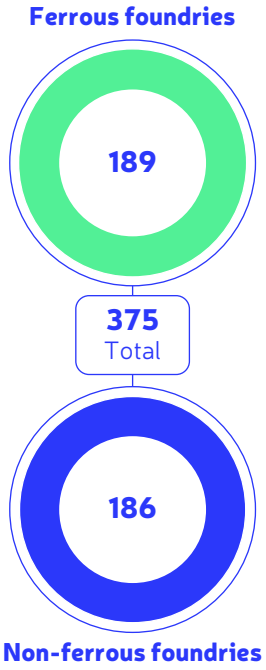
Key challenges for the industry continue to be:

- Energy costs, with ever increasing non-commodity charges now being the greatest part of energy bills for foundries.
- Labour costs due to the increase in national minimum wage and the cost-of-living crisis.
- Aging workforce
- Lack of skilled labour and the inability to attract new employees into the foundries. Starting salaries are having to rise to attract new employees, which if forcing higher wages for skilled personnel to keep salary differences.

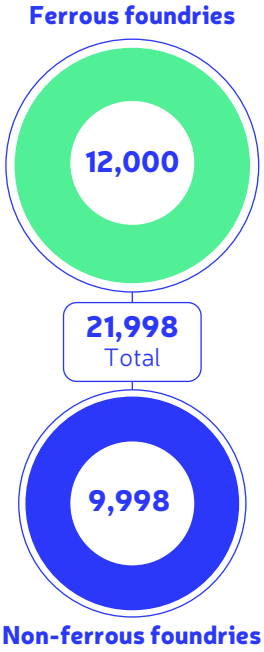
Since early July 2024 a new Government has been in place, with a strong majority in Parliament (providing some stability), and with a greater focus on manufacturing as part of an industrial strategy to generate economic growth.

Highlights UK

Number of foundries

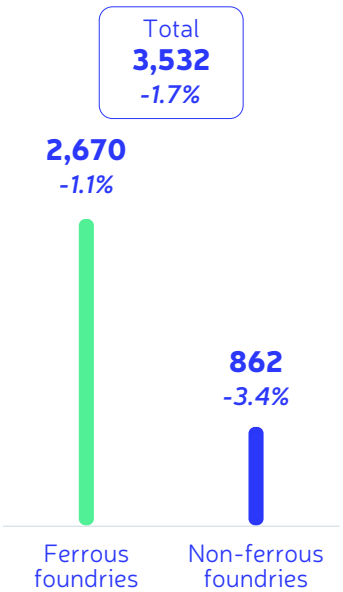


Number of employees



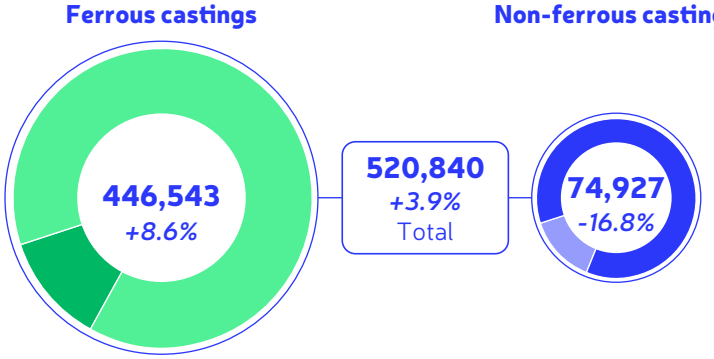
Production value

(million euros and % change 2024 vs. 2023)



Production

(tons and % change 2024 vs. 2023)



394,384 Iron castings ↗ +4.7%

52,159 Steel castings ↗ +51%

63,263 Light and ultralight castings ↘ -18.4%

10,064 Other non-ferrous castings ↘ -4.1%

European
Foundry
Federation

04

Tables

Iron, ductile iron and steel castings

Table 1: Total production in 1000 t - Iron, Steel and Malleable iron castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	158.5	134.7	152.3	149.5	138.2	130.5	-7.6	-5.6
Belgium	67.6	52.4	54.2					
Bulgaria			42.1	43.7	43.7		0.0	
Croatia	29.1	25.7	34.9	36.0	35.1	23.7	-2.5	-32.6
Czech Rep.	268.5	192.5	225.5	222.5	180.0	150.0	-19.1	-16.7
Denmark	86.9		82.0					
Finland	57.8	47.1	51.8	52.8	46.5	35.3	-12.0	-24.1
France	1,304.3	1,067.4	1,212.4	1,244.4	1,170.1	1,086.5	-6.0	-7.1
Germany	3,804.9	2,714.8	3,158.4	3,116.4	3,077.5	2,568.7	-1.3	-16.5
Hungary	76.2	76.4	75.2	74.9	74.9		0.0	
Italy	1,108.9	893.1	1,058.8	1,051.0	1,032.0	856.0	-1.8	-17.1
Norway	31.2		29.4					
Poland	655.0	524.0	571.2	485.5	492.5	418.6	1.4	-15.0
Portugal	140.4	106.3	120.7	114.3	121.0	121.6	5.8	0.5
Slovenia	177.2	116.7	124.5	112.1	104.2	84.6	-7.0	-18.8
Spain	1,113.3	931.1	1,000.8	1,022.0	1,045.3	1,022.5	2.3	-2.2
Sweden	240.4	197.2	210.4	242.0	242.0	228.4	0.0	-5.6
Switzerland	26.3	22.8	23.9	25.6	24.4	21.3	-4.6	-12.8
Türkiye	1,741.2	1,664.0	2,308.0	2,369.9	2,314.9	1,859.5	-2.3	-19.7
UK	414.2	365.6	359.4	402.0	411.3	446.5	2.3	8.6
Total EFF	**11,501.9**	**9,131.8**	**10,895.9**	**10,764.7**	**10,553.5**	**9,053.7**	**-2.0**	**-12.4**

Table 2: Production value in Mio. € - Iron, Steel and Malleable iron castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	432	382	436	512	523	489	2.3	-6.6
Belgium								
Bulgaria			187	197	197		0.0	
Croatia								
Czech Rep.								
Denmark								
Finland	178	143	154	199	182	163	-8.5	-10.5
France	2,769	2,388	2,758	3,435	3,529	3,316	2.8	-6.1
Germany	6,875	5,448	6,433	7,619	7,800	6,767	2.4	-13.2
Hungary	226	232	247	225	225		0.0	
Italy	1,979	1,709	2,232	2,862	2,851	2,198	-0.4	-22.9
Norway	36							
Poland		816						
Portugal	253	211	169	267	295	255	10.4	-13.6
Slovenia		137	243	216	198	160	-8.4	-19.3
Spain	1,913	1,731	1,936	2,470	2,596	2,470	5.1	-4.9
Sweden								
Switzerland								
Türkiye	2,628	2,774	3,348	4,671	5,055	4,210	8.2	-16.7
UK	1,950	2,340	2,200	2,240	2,700	2,670	20.5	-1.1
Total EFF	**19,239**	**18,311**	**20,344**	**24,912**	**26,152**	**22,697**	**5.0**	**-11.1**

Table 3: Number of foundries (Production units) - Iron, Steel and Malleable iron castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	15	15	15	15	15	15	0.0	0.0
Belgium	13	13	13	13	13		0.0	
Bulgaria	0		39	37	37		0.0	
Croatia	0					14		
Czech Rep.	71	70	69	69	67	64	-2.9	-4.5
Denmark	8							
Finland	18	16	15	15	15	15	0.0	0.0
France								
Germany	232	225	220	220	211	208	-4.1	-1.4
Hungary	39			32	32		0.0	
Italy	172	172	176	171	159	157	-7.0	-1.3
Norway	5							
Poland	215	216	216	216	211	215	-2.3	1.9
Portugal	31	31	31	30	30	30	0.0	0.0
Slovenia	11	11	10	10	11	11	10.0	0.0
Spain	71	74	74	74	69	72	-6.8	4.3
Sweden	36	36						
Switzerland	15	15	13	14	14	14	0.0	0.0
Türkiye	550	556	564	570	575	560	0.9	-2.6
UK	207	202	197	194	191	189	-1.5	-1.0
Total EFF	**1,709**	**1,652**	**1,652**	**1,680**	**1,650**	**1,564**	**-1.8**	**-0.4**

Table 4: Employment in the foundry industry - Iron, Steel and Malleables iron castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	2,215	2,158	2,165	2,218	2,192	2,155	-1.2	-1.7
Belgium	1,766	1,727	1,633					
Bulgaria			2,548	2,439	2,439		0.0	
Croatia						1,336		
Czech Rep.	10,500	9,500	9,400	9,000	9,000	8,500	0.0	-5.6
Denmark	1,047							
Finland	1,264	1,170	995	1,084	921	1,038	-15.0	12.7
France								
Germany	39,675	35,385	34,657	34,985	34,650	33,701	-1.0	-2.7
Hungary	3,720	3,620	3,506	3,340	3,340		0.0	
Italy	9,040	9,432	9,587	9,310	9,137	9,078	-1.9	-0.6
Norway								
Poland	16,000	11,125	10,600	10,600	10,600		0.0	
Portugal	2,582	2,181	2,380	2,380	2,354	2,397	-1.1	1.8
Slovenia	1,110	1,277	1,321	1,355	1,334	1,180	-1.5	
Spain	11,162	10,808	10,869	10,881	11,790	11,661	8.4	-1.1
Sweden	7,000	7,000						
Switzerland	1,012	1,012	764	807	836	742	3.6	-11.2
Türkiye	20,100	20,500	20,995	21,525	21,875	19,140	1.6	-12.5
UK	14,150	13,850	13,700	13,510	13,190	12,000	-2.4	-9.0
Total EFF	**142,343**	**130,745**	**125,120**	**123,434**	**123,658**	**102,928**	**0.2**	**-4.1**

Table 5: Direct exports total in 1000 t - Iron, Steel and Malleable iron castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria								
Belgium								
Bulgaria			33	30	30		0.0	
Croatia								
Czech Rep.								
Denmark								
Finland	14	14	16	16	7	6	-58.0	-10.2
France	448	384	432	460	445	431	-3.3	-3.1
Germany	1,554	1,046	1,249	1,288	1,327	1,128	3.0	-15.0
Hungary	45	65	62	58	58		0.0	
Italy	488	387				251		
Norway	16							
Poland		253	259	220	266	226	20.9	-14.9
Portugal	128	98	111	99	104	107	5.1	2.5
Slovenia				87	81		-7.0	
Spain	747	622	659	656	725	702	10.6	-3.2
Sweden								
Switzerland								
Türkiye	1,087	981	1,457	1,573	1,525	1,213	-3.0	-20.5
UK								
Total EFF	**4,527**	**3,850**	**4,277**	**4,486**	**4,567**	**4,064**	**1.8**	**-13.3**

Iron castings

Table 6: Total production in 1000 t - Iron castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	42	33	37	39	32	32	-17.4	-0.3
Belgium	56	43	44					
Bulgaria			26	27	27		-0.1	
Croatia	29	26	35	36	35	18	-2.5	-47.7
Czech Rep.	167	117	140	138	110	98	-20.3	-10.9
Denmark	29							
Finland	18	17	21	20	17	14	-19.0	-17.3
France	537	432	504	506	470	436	-7.0	-7.2
Germany	2,189	1,619	1,874	1,823	1,837	1,623	0.8	-11.6
Hungary	18	16	16	17	17		0.0	
Italy	668	534	616	616	611	538	-0.8	-11.9
Norway	9							
Poland	450	360	392	334	340	289	1.8	-14.9
Portugal	41	26	40	35	37	38	5.9	1.7
Slovenia	130	59	73	66	59	43	-10.4	-27.1
Spain	363	283	323	338	376	334	11.0	-11.1
Sweden	155	126	142	154	154	157	0.0	1.8
Switzerland	9	8	9	10	8	7	-15.0	-18.2
Türkiye	614	617	921	901	868	701	-3.7	-19.2
UK	145	128	128	136	132	130	-3.0	-1.5
Total EFF	**5,640**	**4,421**	**5,306**	**5,160**	**5,130**	**4,458**	**-0.6**	**-11.3**

Table 7: Number of foundries (Production units) - Iron castings (incl. nodular and malleable castings)

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	12	12	12	12	12		0.0	
Belgium	5	5	5					
Bulgaria			29	28	28		0.0	
Croatia	0					13		
Czech Rep.	56	55	54	54	53	44	-2.9	-17.0
Denmark	8							
Finland	11	11	11	11	11	11	0.0	0.0
France								
Germany*	144	140	134	134	134	131	-4.1	-2.2
Hungary	27	27	27	27	27		0.0	
Italy	134	134	136	136	127	123	-7.0	-3.1
Norway	5							
Poland	180	180	180	180	176	180	-2.3	2.3
Portugal	23	23	23	22	22	22	0.0	0.0
Slovenia	11	8	7	7	8	8	10.0	0.0
Spain	42	43	43	42	39	42	-6.8	7.7
Sweden	25							
Switzerland	13	13	10	11	11	11	0.0	0.0
Türkiye	443	447	452	455	458	449	0.9	-2.0
UK								
Total EFF	**1,139**	**1,098**	**1,123**	**1,107**	**1,106**	**1,034**	**-1.8**	**-2.1**

**>50 employees*

Table 8: Employment in the foundry industry - Iron castings (incl. nodular and malleable castings)

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria								
Belgium								
Bulgaria			1,969	1,893	1,893		0.0	
Croatia						1,336		
Czech Rep.								
Denmark	1,047							
Finland	724	645	629	698	558	680	-20.1	21.9
France								
Germany	34,096	29,496	29,276	29,875	29,401	28,250	-1.6	-3.9
Hungary		3,450	3,340	3,210	3,210		0.0	
Italy	6,736	7,119	7,256	6,978	6,850	6,830	-1.8	-0.3
Norway								
Poland	12,500	8,010	7,400	7,400	7,400		0.0	
Portugal	2,064	1,684	1,861	1,861	1,795	1,934	-3.5	7.7
Slovenia	1,110	1,066	1,120	1,154	1,154	1,012	0.0	-12.3
Spain	8,800	8,182	8,199	8,144	8,737	8,541	7.3	-2.2
Sweden								
Switzerland	910	910	527			742		
Türkiye	13,600	13,875	14,225	14,525	14,725	13,105	1.4	-11.0
UK								
Total EFF	**81,587**	**74,437**	**75,802**	**75,738**	**75,723**	**62,430**	**0.0**	**-2.8**

Ductile iron castings

Table 9: Total production in 1000 t - Ductile iron castings (Nodular and Malleable iron castings)

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	105	92	105	104	100	93	-4.1	-6.7
Belgium	5	4	4					
Bulgaria			11	12	12		0.0	
Croatia	7	6	11	7	7	5	3.1	-19.7
Czech Rep.	50	35	41	41	33	27	-18.5	-18.2
Denmark	58							
Finland	29	23	26	27	25	18	-7.4	-28.9
France	711	594	665	691	650	602	-5.9	-7.4
Germany	1,434	957	1,141	1,127	1,104	833	-2.0	-24.5
Hungary	56	58	57	57	57		0.0	
Italy	381	301	386	376	360	270	-4.2	-25.1
Norway	22							
Poland	155	124	135	115	118	100	2.6	-15.2
Portugal	94	76	77	74	79	79	6.6	0.9
Slovenia	47	40	47	42	39	37	-6.3	-4.7
Spain	663	583	609	606	585	603	-3.5	3.2
Sweden	62	51	48	66	66	54	0.0	-18.8
Switzerland	15	12	13	13	13	11	0.2	-15.7
Türkiye	934	855	1,108	1,178	1,191	958	1.1	-19.6
UK	221	196	196	229	245	264	7.0	7.9
Total EFF	**5,042**	**3,998**	**4,668**	**4,756**	**4,683**	**3,955**	**-1.5**	**-13.6**

Steel castings

Table 10: Total production in 1000 t - Steel castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	11	10	10	7	6	5	-5.7	-15.8
Belgium	7	6	5					
Bulgaria			5	5	5		0.0	
Croatia							0.0	
Czech Rep.	52	41	45	44	37	25	-15.9	-32.4
Denmark								
Finland	10	7	6	5	5	4	-7.9	-23.1
France	56	42	43	48	49	48	3.4	-2.6
Germany	178	138	144	167	137	113	-18.2	-17.4
Hungary	2	2	2	2	2		0.0	
Italy	60	58	57	59	61	48	3.1	-20.7
Norway								
Poland	50	40	44	37	35	30	-5.4	-15.0
Portugal	5	4	4	5	5	4	-5.3	-24.2
Slovenia		18	4	4	6	4	37.9	-29.8
Spain	71	65	69	77	85	85	9.6	0.3
Sweden	24	20	21	22	22	18	0.0	-16.4
Switzerland	2	3	2	3	3	3	11.2	16.6
Türkiye	192	192	279	290	256	201	-11.9	-21.2
UK	49	42	35	37	35	52	-7.0	51.0
Total EFF	**770**	**686**	**775**	**812**	**747**	**641**	**-8.0**	**-12.8**

Table 11: Number of foundries (Production units) - Steel castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	3	3	3	3	3		0.0	
Belgium	8	8	8					
Bulgaria	0		10	9	9		0.0	
Croatia	0					1		
Czech Rep.	28	27	27	27	26	25	-3.7	-3.8
Denmark	0							
Finland	7	7	6	6	6	4	0.0	-33.3
France								
Germany	41	39	38	38	38	31	0.0	-18.4
Hungary	12	0	6	5	5		0.0	
Italy	38	38	40	35	32	34	-8.6	6.3
Norway	0							
Poland	35	36	36	36	35	35	-2.8	0.0
Portugal	8	8	8	8	8	8	0.0	0.0
Slovenia	0	3	3	3	3	3	0.0	0.0
Spain	29	31	31	32	30	30	-6.3	0.0
Sweden	11							
Switzerland	2	2	3	3	3	3	0.0	0.0
Türkiye	107	109	112	115	117	111	1.7	-5.1
UK								
Total EFF	**320**	**329**	**331**	**320**	**315**	**285**	**-1.6**	**-3.7**

Table 12: Number of persons employed total - Steel castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria								
Belgium								
Bulgaria			579	546	546		0.0	
Croatia								
Czech Rep.								
Denmark								
Finland	540	525	366	386	363	358	-20.1	-1.4
France								
Germany	6,657	5,889	5,386	5,110	5,249	5,451	-1.6	3.8
Hungary		170	166	130	130		0.0	
Italy	2,304	2,313	2,331	2,332	2,287	2,248	-1.8	-1.7
Norway								
Poland	3,500	3,115	3,200	3,200	3,200		0.0	
Portugal	518	497	519	519	559	463	-3.5	-17.2
Slovenia		211	201	201	180	168	0.0	-6.7
Spain	2,362	2,626	2,670	2,737	3,053	3,120	7.3	2.2
Sweden								
Switzerland	102	102	237					
Türkiye	6,500	6,625	6,770	7,000	7,150	6,035	1.4	-15.6
UK								
Total EFF	**22,483**	**22,073**	**22,425**	**22,161**	**22,717**	**17,843**	**0.0**	**-4.4**

Non-ferrous metal castings

Table 13: Total production in 1000 t - Non-ferrous metal castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	144.8	121.4	139.6	141.9	132.1	139.6	-6.9	5.7
Belgium	1.0	1.7	1.6					
Bulgaria			6.0	6.1	6.1		0.0	
Croatia	45.8	65.9	60.8	34.1	74.9	52.6	119.6	-29.7
Czech Rep.	116.0	94.5	108.3	105.5	98.0	91.0	-7.1	-7.1
Denmark	3.5		3.2					
Finland	5.3	4.1	6.1	6.3	4.5	3.5	-27.9	-22.2
France	392.4	330.7	339.9	340.4	353.7	334.0	3.9	-5.6
Germany	1,019.2	769.4	806.1	810.3	834.2	795.0	3.0	-4.7
Hungary	124.0	121.7	121.6	126.0	126.0		0.0	
Italy	827.3	659.2	880.5	820.6	828.0	776.8	0.9	-6.2
Norway	6.5		5.9					
Poland	356.5	285.2	310.9	264.2	261.6	248.5	-1.0	-5.0
Portugal	56.5	50.3	50.6	51.5	49.2	48.5	-4.5	-1.3
Slovenia	75.7	53.1	64.3	66.4	64.0	62.5	-3.6	-2.3
Spain	153.9	124.6	127.7	131.4	136.3	134.6	3.7	-1.2
Sweden	65.1	56.4	60.0	60.0	60.0	60.0	0.0	0.0
Switzerland	15.9	13.6	14.8	15.4	15.6	13.4	1.0	-14.0
Türkiye	573.0	506.8	655.5	738.8	735.4	745.1	-0.5	1.3
UK	165.8	120.1	114.5	97.3	90.0	74.9	-7.5	-16.8
Total EFF	**4,102.6**	**3,312.8**	**3,817.0**	**3,763.5**	**3,869.6**	**3,580.2**	**2.8**	**-2.5**

Table 14: Production value in Mio. € - Non-ferrous metal castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	974	812	960	1,150	1,178	933	2.4	-20.8
Belgium								
Bulgaria			28	30	30		0.0	
Croatia								
Czech Rep.								
Denmark								
Finland	51	45	54	62	62	50	-0.9	-19.9
France	2,373	1,883	2,096	2,459	2,530	2,418	2.9	-4.4
Germany	5,558	4,429	5,190	6,209	6157	5,139	-0.8	-16.5
Hungary	387	390	408	450	450		0.0	
Italy	4,390	3,569	4,646	3,053		4,438		
Norway	51							
Poland								
Portugal	381	325	323	376	356	355	-5.4	-0.3
Slovenia		0	651	803	838	788	4.3	-5.9
Spain	1,020	803	893	1,039	998	1,009	-3.9	1.1
Sweden								
Switzerland								
Türkiye	2,691	2,530	2,708	3,834	4,126	4,304	7.6	4.3
UK	1,050	950	920	840	892	862	6.2	-3.4
Total EFF	**18,926**	**15,736**	**18,875**	**20,307**	**17,617**	**20,295**	**-13.2**	**-2.7**

Table 15: Number of foundries (Production units) - Non-ferrous metal castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	23	22	22	22	21	20	-4.5	-4.8
Belgium	6	6	6	6	6			
Bulgaria	0		23	22	22		0.0	
Croatia	0					36		
Czech Rep.						65		
Denmark	7							
Finland	14	13	13	12	12	9	0.0	-25.0
France								
Germany	330	327	322	323	315	306	-2.5	-2.9
Hungary	33	31	32	32	32		0.0	
Italy	864	866	843	820	732	704		
Norway	3							
Poland	240	240	240	240	238	240		
Portugal	57	57	57	57	57	57	0.0	0.0
Slovenia	47	47	45	43	42	39	-2.3	-7.1
Spain	52	52	52	53	52	53	-1.9	1.9
Sweden	60							
Switzerland	31	31	30	30	30	30		
Türkiye	394	396	404	409	412	405	0.7	-1.7
UK	199	195	191	189	189	186	0.0	-1.6
Total EFF	**2,360**	**2,283**	**2,280**	**2,258**	**2,160**	**2,150**	**-4.3**	**-0.4**

Table 16: Employment in the foundry industry - Non-ferrous metal castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	4,718	4,380	4,357	4,239	3,938	3,778	-7.1	-4.1
Belgium	496	494	466	466	466		0.0	
Bulgaria			595	587	587		0.0	
Croatia						1,909		
Czech Rep.	4,000	4,000	4,000	4,000	4,500	4,500		
Denmark	372							
Finland	381	344	350	361	379	327	5.0	-13.7
France								
Germany	35,522	32,473	31,242	33,662	32,722	30,803	-2.8	-5.9
Hungary	5,230	5,250	5,333	4,800	4,800		0.0	
Italy	18,815	18,813	18,878	14,524	14,061	14,788		
Norway	287							
Poland	8,300	7,387	11,200	11,200	11,200			
Portugal	3,365	3,293	3,339	3,289	3,108	3,047	-5.5	-2.0
Slovenia	4,032	3,669	3,576	3,547	3,646	3,658	2.8	0.3
Spain	5,242	4,623	4,597	4,753	4,475	4,534	-5.8	1.3
Sweden	7,000							
Switzerland	1,450	1,450	1,166	1,165	1,224	1,059		
Türkiye	13,750	13,850	14,150	14,250	14,320	14,120	0.5	-1.4
UK	13,150	13,000	12,560	12,390	10,530	9,998	-15.0	-5.1
Total EFF	**126,110**	**113,026**	**115,809**	**113,233**	**109,956**	**92,521**	**-2.9**	**1.5**

Light and ultralight castings

Table 17: Total production in t - Light and ultralight castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria	133,406	111,302	127,971	131,859	123,972	130,215	-6.0	5.0
Belgium	683	539						
Bulgaria			5,700	5,730	5,730		0.0	
Croatia						52,454		
Czech Rep.	95,000	77,700	89,400	87,600	82,200	78,300	-6.2	-4.7
Denmark	2,224							
Finland	2,184	1,730	3,604	3,604	1,797	1,691	-50.1	-5.9
France	348,062	293,529	299,016	299,255	314,267	297,296	5.0	-5.4
Germany	1,011,599	673,227	716,616	716,465	740,610	702,607	3.4	-5.1
Hungary	122,675	119,186	119,304	124,013	124,013		0.0	
Italy	685,584	543,972	732,537	685,046	687,213	630,680	0.3	-8.2
Norway	6,526							
Poland	340,000	272,000	296,480	252,008	250,000	237,500	-0.8	-5.0
Portugal	37,009	31,966	33,050	34,859	33,673	32,738	-3.4	-2.8
Slovenia	54,625	44,618	52,692	55,576	57,912	56,680	4.2	-2.1
Spain	129,345	101,317	106,185	110,522	114,618	113,643	3.7	-0.9
Sweden	48,000	39,195	45,000	48,000	48,000	45,000	0.0	-6.3
Switzerland	12,699	10,815	11,726	12,362	12,531	10,536	1.4	-15.9
Türkiye	504,328	50,264	579,124	665,930	660,832	678,892	-0.8	2.7
UK	149,100	104,522	99,296	87,649	79,510	64,863	-9.3	-18.4
Total EFF	**3,683,049**	**2,875,882**	**3,317,701**	**3,320,479**	**3,336,878**	**3,133,095**	**0.5**	**-2.2**

Table 18: Light and ultralight castings in t

	Year	Aluminium			Magnesium
		Sandcast and gravity die casting	Pressure die casting	Total	Total
Austria	2023	14,919	104,762	119,681	
	2024	16,651	106,672	123,323	
	in %	11.6	1.8	3.0	
Czech Rep.	2023			81,900	300
	2024			78,100	200
	in %			-4.6	-33.3
Finland	2023	779	1,018	1,797	
	2024	708	983	1,691	
	in %	-9.1	-3.4	-5.9	
Germany	202	316,994	408,691	731,518	9,092
	2024	298,303	396,152	694,455	8,152
	in %	-5.9	-3.1	-5.1	-10.3
Italy	2023			684,729	2,484
	2024			628,581	2,099
	in %			-8.2	-15.5
Poland	2023				
	2024			237,500	
	in %				
Portugal	2023	1,641	32,032	33,673	
	2024	2,097	30,641	32,738	
	in %	27.8	-4.3	-2.8	
Slovenia	2023				
	2024			56,680	
	in %				
Spain	2023	1,366	113,252	114,618	
	2024	2,869	110,663	113,532	
	in %	110.0	-2.3	-0.9	
Sweden	2023				
	2024			45,000	
	in %				
Switzerland	2023	2,013	10,518	12,531	
	2024	1,887	8,649	10,536	
	in %	-6.3	-17.8	-15.9	
Türkiye	2023	75,621	584,445	660,066	766
	2024	78,800	599,385	678,186	707
	in %	4.2	2.6	2.7	-7.8
UK	2023	0,0	0,0	77,910	1,600
	2024			63,263	1,600
	in %			-18.8	0.0

Other non-ferrous castings

Table 19: Total production in t - Copper alloy castings

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria								
Belgium								
Bulgaria			320	340	340		0.0	
Croatia						182		
Czech Rep.	20,000	16,000	18,000	17,000	15,000	12,000	-11.8	-20.0
Denmark	1,188							
Finland	3,124	2,415	2,508	2,678	2,734	1,835	2.1	-32.9
France	17,409	16,118	17,705	18,459	17,696	17,410	-4.1	-1.6
Germany	77,225	46,076	48,425	46,633	66,737	69,900	43.1	4.7
Hungary	483	729	701	310	310		0.0	
Italy	48,232	38,168	51,947	46,869	48,022	48,790	2.5	1.6
Norway								
Poland	6,000	4,800	5,232	4,448	4,442	6,214	-0.1	39.9
Portugal	17,054	16,203	14,699	14,225	13,496	13,794	-5.1	2.2
Slovenia	872	990	1,005	1,125	1,050	922	-6.7	-12.2
Spain	14,634	15,279	12,807	12,617	13,764	13,196	9.1	-4.1
Sweden								
Switzerland	2,131	2,023	2,039	1,935	2,131	2,020	10.1	-5.2
Türkiye	29,285	24,851	33,388	24,337	24,580	23,912	1.0	-2.7
UK	8,650	8,300	7,885	7,860	8,646	8,214	10.0	-5.0
Total EFF	**246,287**	**191,952**	**216,660**	**198,836**	**218,948**	**218,389**	**10.1**	**0.4**

Table 20: Total production in t - Zinc

	2019	2020	2021	2022	2023	2024	2023/22 in%	2024/23 in%
Austria								
Belgium								
Bulgaria								
Croatia								
Czech Rep.	1,000	800	900	900	800	700	-11.1	-12.5
Denmark								
Finland								
France	24,486	18,880	20,739	20,324	19,484	19,249	-4.1	-1.2
Germany	57,182	49,761	41,095	28,748	26,895	22,482	-6.4	-16.4
Hungary	763	1,662	1,542	1,576	1,576		0.0	
Italy	92,161	75,834	95,089	88,151	92,732	97,369	5.2	5.0
Norway								
Poland	7,500	6,000	6,540	5,559	5,050	4,797	-9.2	-5.0
Portugal	2,464	2,165	2,829	2,419	2,011	2,003	-16.9	-0.4
Slovenia	9,665	7,477	8,187	7,103	5,073	4,946	-28.6	-2.5
Spain	8,426	7,304	7,973	7,491	7,738	7,773	3.3	0.5
Sweden								
Switzerland	1,051	762	1,054	1,127	920	842	-18.4	-8.5
Türkiye	39,432	31,644	42,981	48,536	49,992	42,301	3.0	-15.4
UK	8,090	7,300	7,300	1,800	1,850	1,850	2.8	0.0
Total EFF	**252,220**	**209,589**	**236,229**	**213,734**	**214,122**	**204,312**	**0.2**	**-1.5**

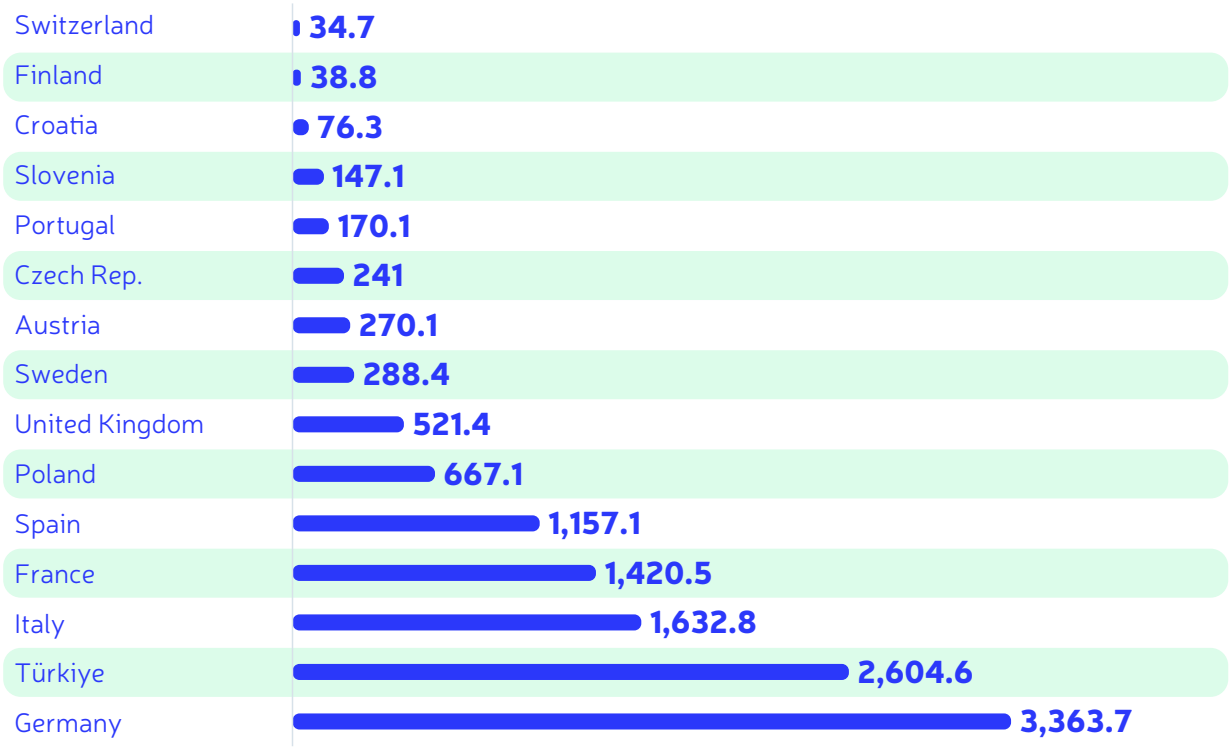
European
Foundry
Federation

05

Charts

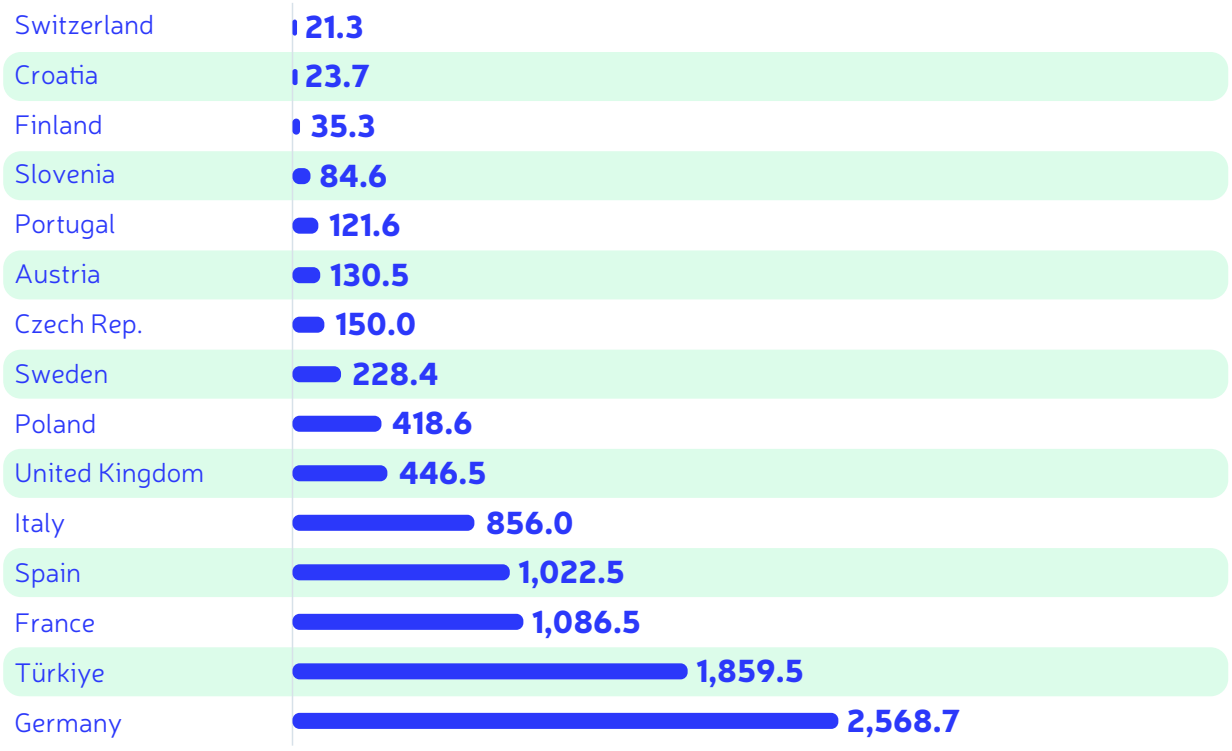
Production of Ferrous and Non-ferrous Castings

in the European Foundry Industry in 2024 (in 1,000 t)



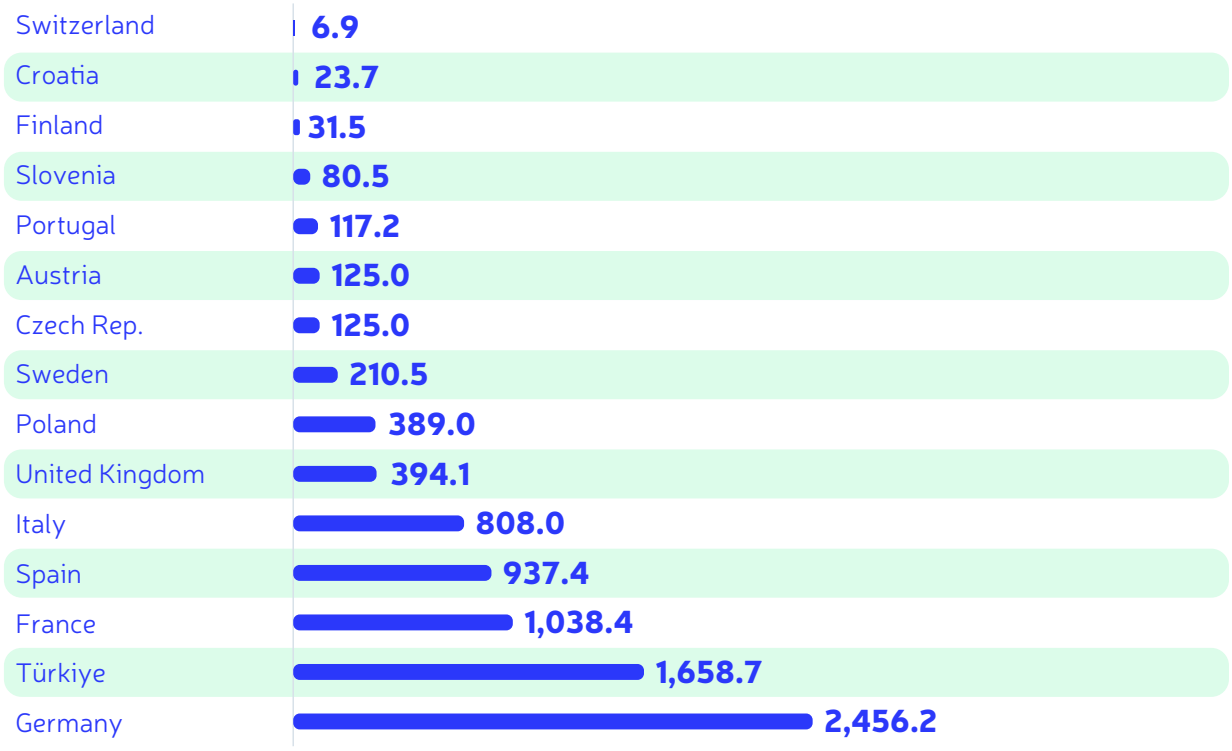
Production of Iron, Ductile Iron and Steel Castings

in the European Foundry Industry in 2024 (in 1,000 t)



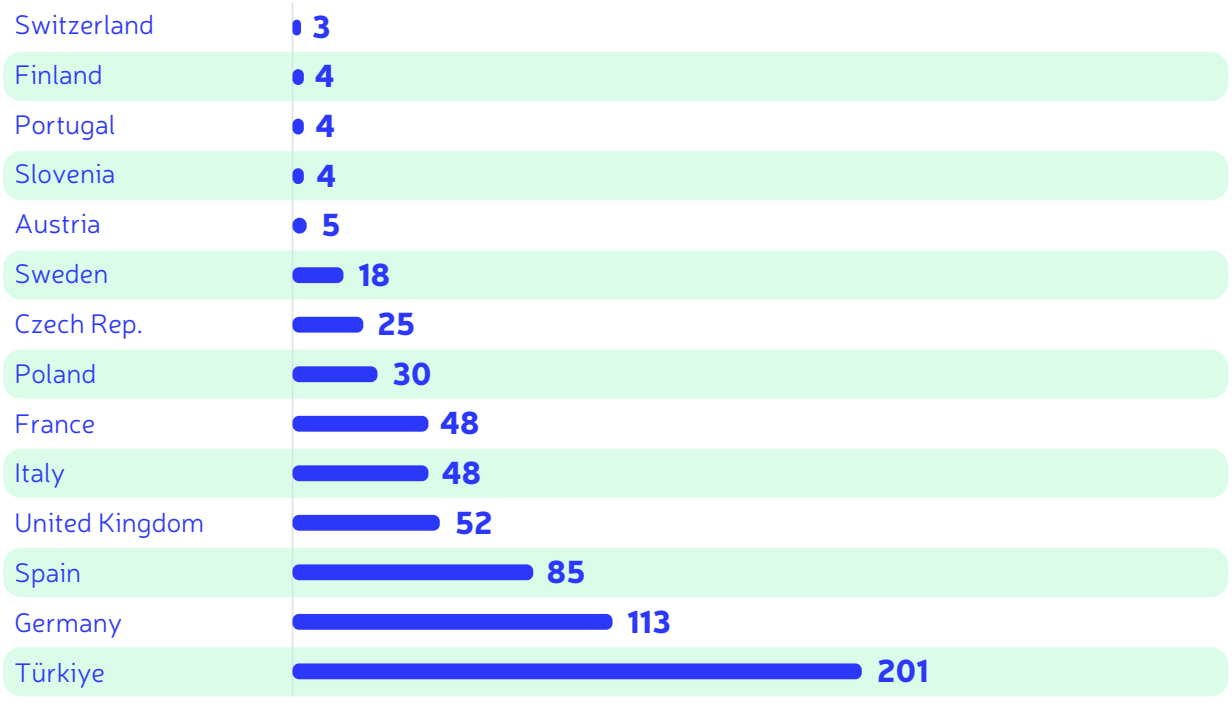
Production of Iron Castings (incl. Nodular and Malleable Iron Castings)

in the European Foundry Industry in 2024 (in 1,000 t)



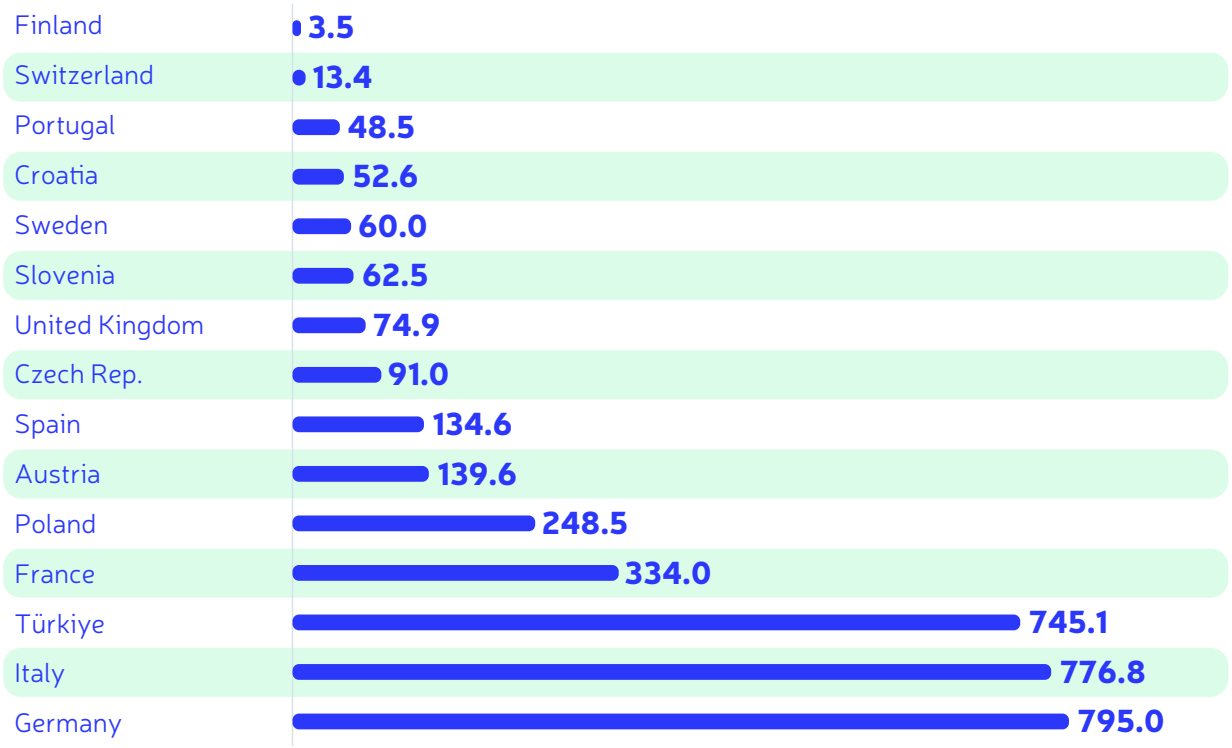
Production of Steel Castings

in the European Foundry Industry in 2024 (in 1,000 t)



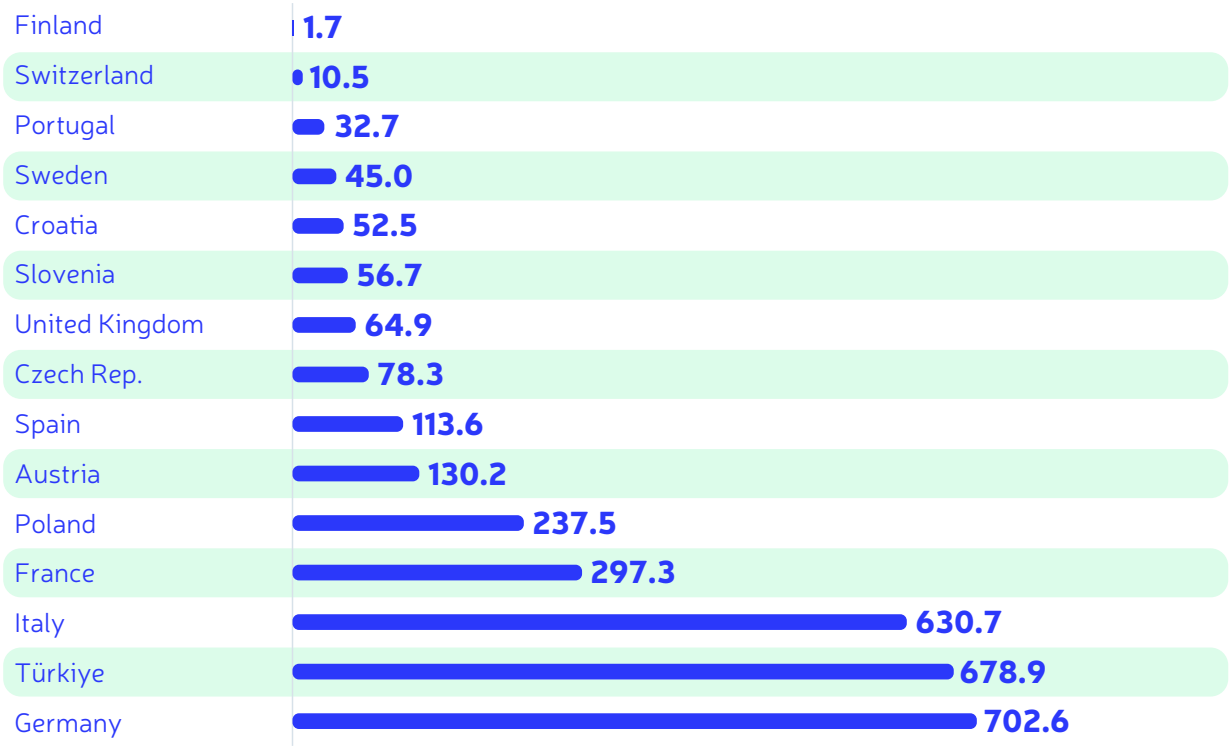
Production of Non-ferrous Castings

in the European Foundry Industry in 2024 (in 1,000 t)



Production of Light and Ultralight Castings

in the European Foundry Industry in 2024 (in 1,000 t)



European
Foundry
Federation

EFF - European Foundry Federation
General Secretariat
Alameda Urquijo 33, 1D, Abando
48008 Bilbao, Spain
info@eff-eu.org - www.eff-eu.org