

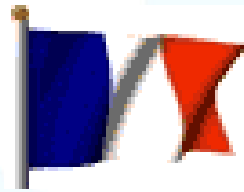


Association Française des  
Industries du Moule, Modèle,  
Maquette et Métiers Associés



 10<sup>TH</sup> INTERNATIONAL PATTERN  
& MODEL MAKING CONGRESS

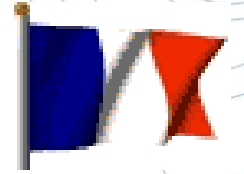
**FRANCE**



**REPORT TO CONGRESS**

France Desjonquères Laly  
President of AFIM

# FRENCH ECONOMIC SITUATION



Some economic fundamentals in 2005 :

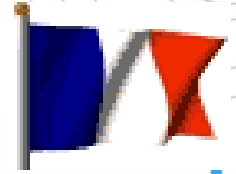
- Increase of Growth of the domestic product (GDP) (1710 milliard euros): +1,2 %. For 2006: +1.6% is anticipated
- Inflation rate: 1,9 %
- Unemployment rate: 9,5 %
- Basic working week: 35 hours
- Holidays : 5 weeks/year
- Average Moulder Hourly Wage: 13-16 euros

## The Pattern Model, Mould and Prototype Industry

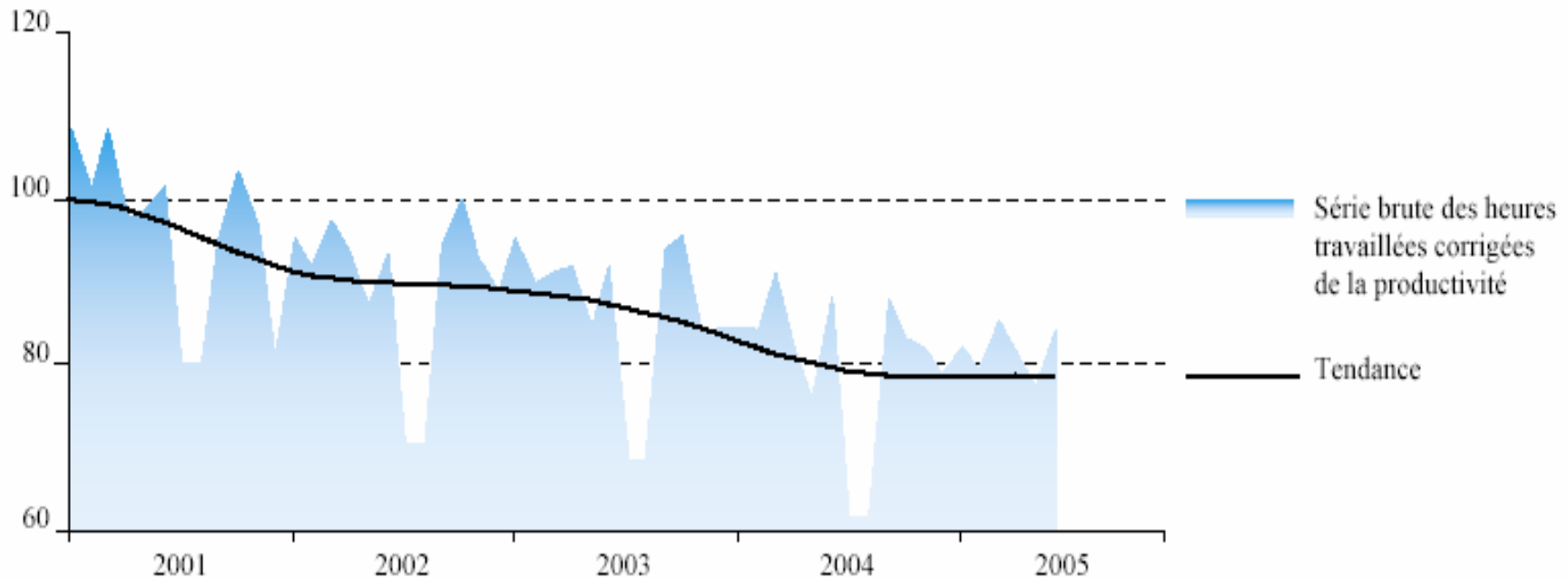


- Over the past years, our industry suffered a lot and a significant number of companies shut down.
- Among the main reasons of the slow down of the activity:
  - competition of low cost countries (Eastern Europe and Asia)
  - regrouping of clients companies

## The slow down of the activity over 5 years



### LA BAISSÉ DE L'ACTIVITÉ SE POURSUIT \*



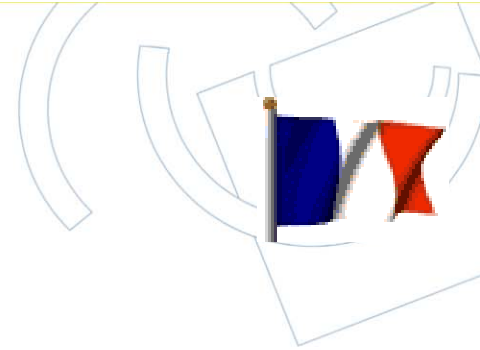
\* L'activité est suivie en heures travaillées (corrégées de la productivité), compte tenu de son hétérogénéité et de la difficulté à mesurer les quantités produites.

Base 100 en 2000

SESSI - enquêtes mensuelles de branche -

*The activity measured in worked hours*

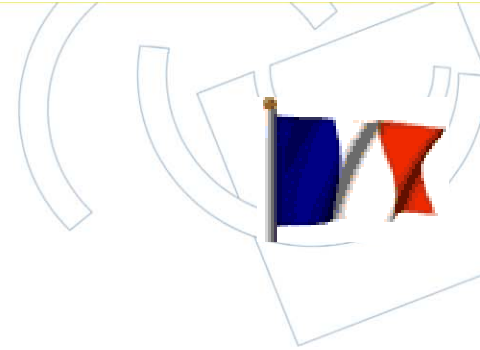
## Current Market Situation



- “Less costly” price
- Regrouping of Companies
- Clients Purchasing Policy Technics
- Low Cost companies pressure on industry

## Opportunities for the sector

- Technological watch
- Networking
- Place of Modeling link/prototype
- Style Development



# Some data on the Pattern Model and Mould Industry



**Globally the industry represents:**

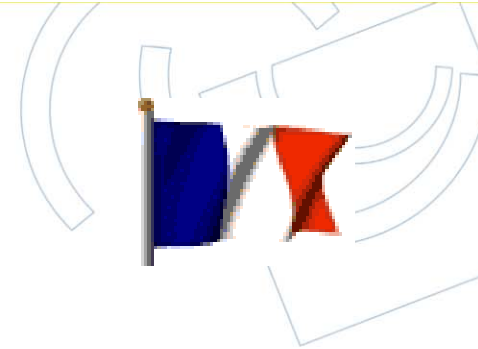
- **Number of companies 781**
- **Employees 11 200**
- **Turnover 1305 millions euros**

**To note: in this sector, 73 % of French companies have less than 20 employees, accounting for 25 % of the total labor force and 24 % of the total turnover.**

**Data for companies of 20 employees or more (source SESSI) :**

- **Number of companies 210**
- **Employees 8400**
- **Turnover 992 millions euros**
- **Exportation 10 %**





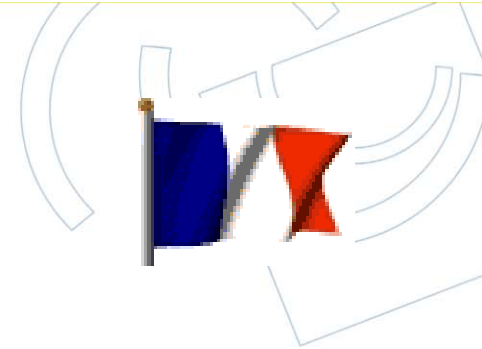
## EVOLUTION DE L'ACTIVITE

*Entreprises plus de 20 personnes*

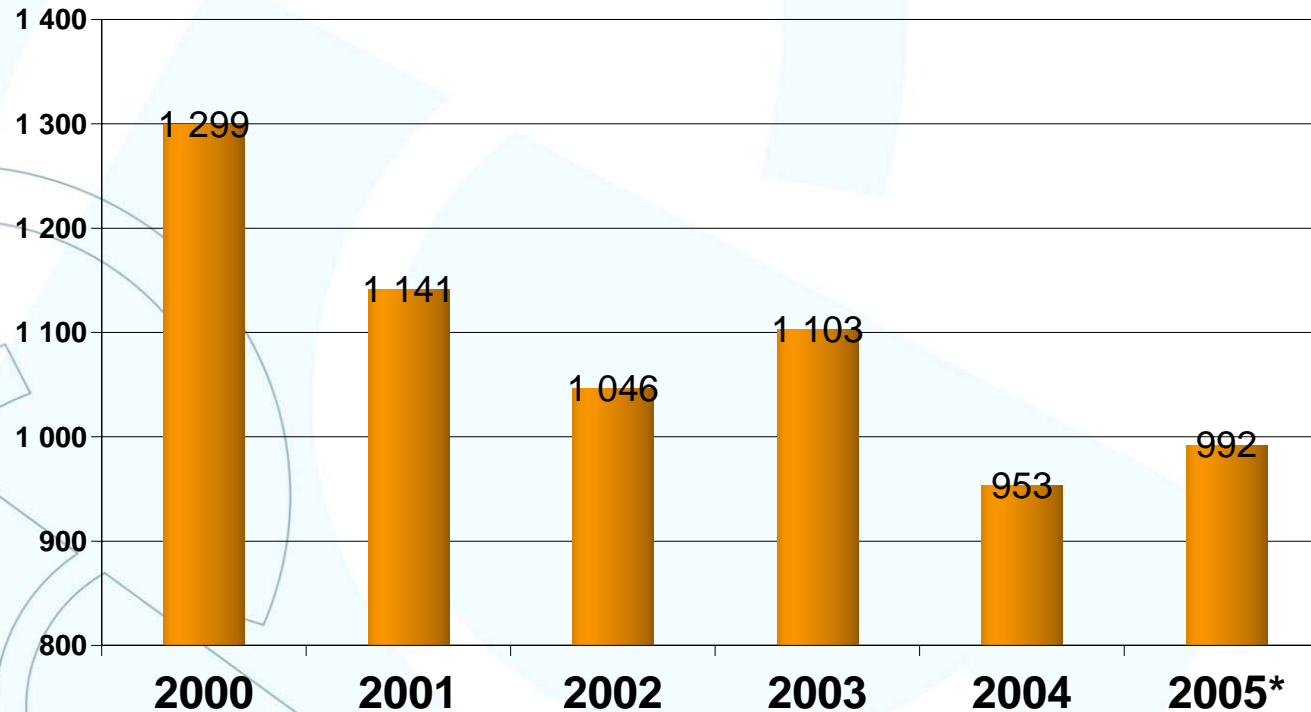
<b>FACTURATIONS</b>		<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005*</b>
Millions d'€	<b>FRANCE</b>	1 104	975	891	931	805	837
	<b>EXPORT</b>	195	166	155	172	148	155
	<b>TOTAL</b>	<b>1 299</b>	<b>1 141</b>	<b>1 046</b>	<b>1 103</b>	<b>953</b>	<b>992</b>
<b>EFFECTIFS</b>		11 114	10 453	10 003	9 598	8 437	8 428
<b>NOMBRE ENTREPRISES</b>		274	233	221	222	210	211

*Sources : Ministère de l'Industrie (SESSI), FIM*

*(\*) Provisoires*



## EVOLUTION DES FACTURATIONS TOTALES (En millions d'Euros)



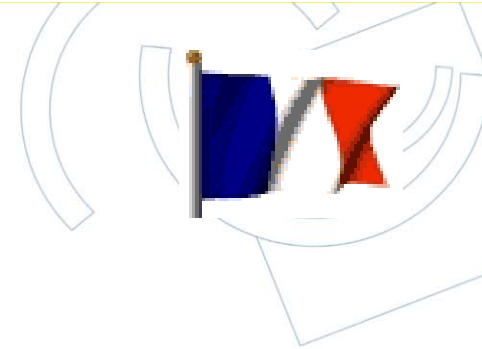
Source: FIM, Pôle Etudes stratégiques et Prospective



## AFIM : The French Association of Mould, Pattern & Model Maker Industry

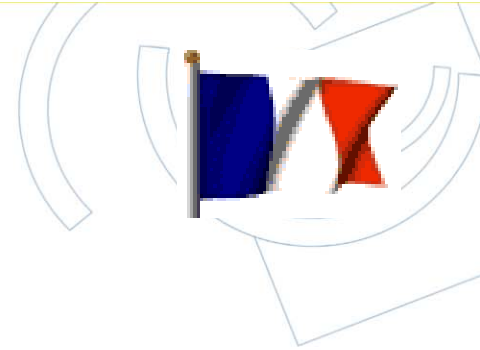
- AFIM was founded in 1924 (Pattern Model Masters).
- Today, it gathers more than 100 members (representing 20% of our industry) in different groups:
  - the mould makers
  - the pattern model makers
  - the associated trades and corresponding members
- Major economic sectors represented are the automotive, aeronautics, electronics, luxury products, railway and nautism.

## AFIM MAIN ACTIONS



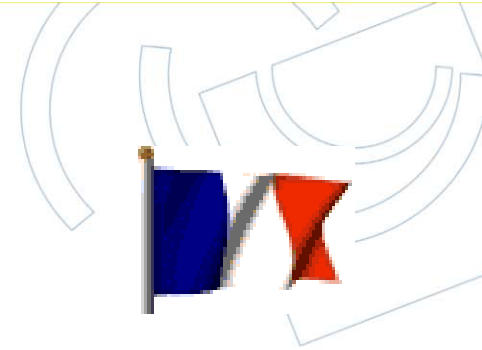
- Defending the professional interests of its members (law, technics, normalisation, training ...)
- Promoting actively its members know-how
- Training
- Counselling
- Quality / Environment
- Information (internet site, newsletter, magazine, meeting, Congress)
- Promotion and Trade fairs
- Technical and Economic studies (inc. Foreign countries)
- Lobbying (ie negotiating payment terms at the upper level)
- Collaboration dialogue: AFPR, Profession Plastique, CETIM, UNM, Fédération de la Plasturgie
- On the international level, AFIM is a member of ISTMA.

# CONCLUSION



## Strengths of the sector:

- Duration of activity vs. clients volatility
- Markets proximity
- Invention, opportunism, « being different », singularity
- Performance speed
- Adaptability to process standard with flexibility



I am very proud of welcoming you during this Congress.

Thank you!