European
Foundry
Federation

Annual report 2025

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01 Preface

It is my pleasure to introduce the 2025 edition of The European Foundry Industry, the annual statistical review published by the European Foundry Federation (EFF).

For decades, this publication has provided a comprehensive picture of the European foundry industry, drawing on the valuable contributions of our national member associations. Beyond its statistical importance, the Yearbook offers an essential perspective on the evolution of a sector that remains fundamental to Europe's industrial competitiveness and economic resilience.

The figures for 2025 confirm that the European foundry industry continues to face a prolonged and profound crisis. Following the sharp contraction recorded in 2024, the anticipated recovery has failed to materialise. Overall European casting production declined by a further 5.5% in 2025, confirming the persistence of the downturn and the difficulties facing the sector.

The situation nevertheless differs significantly between countries. While some markets have shown signs of stabilisation or modest recovery, others have experienced further substantial declines. Germany, Europe's largest casting producer, recorded another contraction of 3.4%, while French production fell by more than 10%. Italy experienced a more limited decline of 1.6%, whereas Poland and the Czech Republic registered increases of 3.4% and 1.7%, respectively.

These contrasting developments illustrate the diversity of national circumstances, but they should not obscure the broader reality: the European foundry industry is facing challenges that extend far beyond the normal fluctuations of the economic cycle.

Weakness in key customer industries, particularly automotive, machinery and construction, continues to weigh heavily on demand. At the same time, European manufacturers face intense competition from producers operating under substantially different economic, environmental and regulatory conditions. Persistent global overcapacity, particularly in Asia, combined with Europe's structurally high energy costs, is placing considerable pressure on the competitiveness of our industrial base.

The consequences are increasingly visible. Financial difficulties, restructuring, production reductions and plant closures are threatening industrial capabilities that have taken decades to develop. Once lost, these capabilities are extremely difficult to rebuild.

This situation is particularly concerning at a time when Europe has placed industrial sovereignty, strategic autonomy and reindustrialisation at the centre of its ambitions.

Foundries are an essential link in almost every industrial value chain, supplying critical components for machinery, transportation, energy, infrastructure and defence. Their technological expertise, skilled workforce and production capabilities are indispensable to Europe's ability to manufacture, innovate and maintain control over its industrial future.

Preserving a strong and competitive European foundry industry is therefore not merely a sectoral concern, but a strategic necessity for Europe.

This conviction is driving EFF's political action.

Our Federation is intensifying its engagement with European institutions to ensure that industrial competitiveness becomes a central consideration in EU policymaking.

We are actively challenging the revision of EU ETS benchmarks, where the proposed reduction in free emission allowances threatens to impose unsustainable additional costs on European foundries. We are also advocating for an effective Carbon Border Adjustment Mechanism (CBAM), including appropriate coverage of downstream products and safeguards against circumvention, to prevent carbon leakage and unfair competition.

More broadly, EFF is working alongside other European industrial organisations to promote affordable energy, fair international competition, proportionate regulation and investment conditions that allow European manufacturers to remain competitive while pursuing decarbonisation.

Our objective is not to challenge Europe's environmental ambitions, but to ensure that they can be achieved while preserving its industrial base. Decarbonisation must go hand in hand with competitiveness: relocating production outside Europe would benefit neither European industry nor the global environment.

The coming years will be decisive. EFF will continue to defend the interests of European foundries, working closely with our national associations and industrial partners to ensure that our sector's concerns are heard and reflected in European policies.
EFF – The European Foundry Federation

I would like to express my sincere appreciation to all EFF member associations for their continued commitment and for the extensive work involved in collecting and consolidating the statistics presented in this Yearbook. Their contributions make this publication possible and demonstrate the strength and professionalism of our European foundry community.

Europe's industrial sovereignty depends on its ability to preserve and develop its manufacturing capabilities. Ensuring that European foundries remain an integral part of that future is the mission to which EFF remains firmly committed.



Chiara Danieli
President



Ainhoa Ondarzabal
Secretary General

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02

General Overview

The European foundry industry in 2025

Economic environment, customer industries and foundry production

Key figures at a glance

TOTAL PRODUCTION	PRODUCTION VALUE	EMPLOYMENT
12.3 Mt	€ 41.2 bn	245,000
–5.5% vs 2024	**–5.7%** vs 2024	**–4.2%** vs 2024

Ferrous castings 8.8 Mt (-6.2%) · €21.2 bn (-8.3%) · ~102,000 employees
Non-ferrous castings 3.5 Mt (-2.7%) · €20.0 bn (-4.1%) · ~93,000 employees

Key figures for EFF countries. Year-on-year changes on a comparable basis (countries reporting both years). Breakdown by segment excludes countries reporting total employment only. Source: EFF survey.

The global macroeconomic framework

According to the IMF's April 2026 World Economic Outlook, the global economy proved more resilient than expected in 2025. World GDP grew by 3.4%, in line with 2024 and well above the 2.8% projected a year earlier. Activity was supported by a lower-than-feared impact of tariffs, the front-loading of purchases ahead of announced tariff increases, a weaker US dollar, fiscal support in the United States, Germany and China, and the boom in AI-related investment. World trade growth accelerated to 5.1%, global inflation fell to 4.1%, and oil prices dropped by 14.4%.
Growth remained uneven across the main economies. The United States grew by 2.1% and China by 5.0%, with China's trade surplus reaching a record $1.2 trillion as its exports shifted away from the US towards Asian and European markets. The Euro Area recovered moderately to 1.4%, with Germany (0.2%) and Italy (0.5%) lagging behind and Spain (2.8%) leading among the major economies. The outlook for 2026 has deteriorated following the outbreak of the Middle East conflict at the end of February. In its July 2026 update, the IMF lowered its forecast for world growth in 2026 to 3.0% (from 3.1% in April) and raised its global inflation forecast to 4.7% (from 4.4%), noting that the disinflation seen since 2024 has stalled, with energy prices around 25% above pre-conflict levels. World trade is projected to grow by 3.5%. Growth is expected at 2.3% in the United States and 4.6% in China, while the Euro Area is set to slow to 0.9%, the weakest pace among the major economies.

The situation in EFF countries

Overall, the macroeconomic outlook for the EFF countries in 2025 was more favourable than in 2024. Economic growth strengthened moderately, inflation continued to move towards more sustainable levels, and labour market conditions improved slightly. These developments suggest a gradual consolidation of the economic recovery. However, the outlook remained subject to significant downside risks stemming from geopolitical uncertainty, trade tensions, and the evolution of energy prices.

GDP growth

At the aggregate EFF level, GDP growth increased from 0.7% in 2023 to 1.2% in 2024 and 1.4% in 2025, indicating a gradual strengthening of economic activity over the period. The improvement in 2025 was supported by stronger growth in several European economies. Among the countries included in the EFF, Poland recorded GDP growth of 3.6% in 2025, Denmark reached 2.9% and the Czech Republic 2.5%. Growth also strengthened in Germany, from -0.9% in 2023 to 0.2% in 2025, and remained positive in France, reaching 0.9% in 2025. The United Kingdom recorded growth of 1.3% in 2025, while the Netherlands reached 1.9%. Despite

Table 1 – General economic data, EFF countries

COUNTRY	Weight (%)		GDP growth (%)			Consumer prices (%)			Unemployment rate (%)		
	Pop.	GDP	2023	2024	2025	2023	2024	2025	2023	2024	2025
Austria	1.6	2.2	–0.8	–0.7	0.6	7.7	2.9	3.6	5.1	5.2	5.7
Belgium	2.1	2.8	1.7	1.1	1.0	2.3	4.3	3.0	5.5	5.7	6.2
Czech Republic	1.9	1.5	0.0	1.3	2.5	10.7	2.4	2.5	2.6	2.6	2.9
Denmark	1.1	1.8	0.6	3.5	2.9	3.4	1.3	1.8	2.8	2.9	2.9
Finland	1.0	1.2	–1.3	0.4	0.2	4.3	1.0	1.8	7.2	8.4	9.7
France	12.2	12.8	1.6	1.1	0.9	5.7	2.3	0.9	7.3	7.4	7.6
Germany	14.9	19.2	–0.9	–0.5	0.2	6.0	2.5	2.3	3.1	3.4	3.8
Hungary	1.7	0.9	–0.8	0.6	0.4	17.1	3.7	4.4	4.1	4.5	4.3
Italy	10.5	9.7	0.9	0.8	0.5	5.9	1.1	1.6	7.7	6.6	6.1
Netherlands	3.2	5.1	–0.6	1.1	1.9	4.1	3.2	3.0	3.6	3.7	3.9
Norway	1.0	2.0	0.4	1.4	1.1	5.5	3.2	3.0	3.6	4.0	4.5
Poland	6.5	3.9	0.3	3.0	3.6	11.4	3.6	3.6	2.8	2.9	3.1
Portugal	1.9	1.3	3.1	2.2	1.9	5.3	2.7	2.2	6.6	6.5	6.0
Slovenia	0.4	0.3	2.4	1.7	1.1	7.2	2.0	2.5	3.9	3.7	3.9
Spain	8.8	7.3	2.5	3.5	2.8	3.4	2.9	2.7	12.2	11.3	10.5
Sweden	1.9	2.6	–0.2	1.0	1.5	5.9	2.0	2.6	7.7	8.4	8.9
Switzerland	1.6	4.0	0.9	1.4	1.3	2.1	1.1	0.2	2.0	2.4	2.8
Türkiye	15.3	6.1	5.0	3.3	3.6	53.9	58.5	34.9	9.4	8.7	8.3
United Kingdom	12.4	15.3	0.3	1.1	1.3	7.3	2.5	3.4	4.1	4.3	4.9
EFF*	**100.0**	**100.0**	**0.7**	**1.2**	**1.4**	**8.9**	**5.8**	**4.3**	**6.2**	**6.1**	**6.1**

** EFF: weighted average. GDP growth and consumer prices weighted by GDP share; unemployment rate weighted by population share of EFF countries. Source: IMF, World Economic Outlook Database, April 2026.*

this broad-based improvement, growth remained moderate in several major European economies, highlighting the still gradual nature of the European economic recovery.

Consumer prices

Inflation showed a significant normalization over the period. At the aggregate EFF level, consumer price growth declined from 8.9% in 2023 to 5.8% in 2024 and 4.3% in 2025. The decline was particularly pronounced in several countries that had experienced high inflation in 2023. Hungary, for example, saw consumer price growth fall from 17.1% in 2023 to 4.4% in 2025, while Türkiye declined from 53.9% to 34.9% over the same period. Poland also recorded a substantial reduction, from 11.4% in 2023 to 3.6% in 2025. Inflation in Italy decreased from 5.9% in 2023 to 1.1% in 2024, before edging up to 1.6% in 2025, while France recorded 0.9% in 2025 and Germany 2.3%. Overall, the data indicate a broad-based disinflationary process across the EFF economies, although inflation remained considerably higher in some countries, particularly Türkiye, than in the rest of the group. Excluding Türkiye, the EFF aggregate would stand at around 2.3% in 2025.

Unemployment rate

The labour market remained relatively resilient throughout the period. At the aggregate EFF level, the unemployment rate declined marginally from 6.2% in 2023 to 6.1% in 2024 and remained at 6.1% in 2025. The aggregate figures therefore point to a broadly stable labour market, despite the moderate pace of economic growth. Considerable differences persisted across countries. In 2025, unemployment was particularly low in Switzerland (2.8%), the Czech Republic (2.9%), Denmark (2.9%), and Poland (3.1%). The Netherlands recorded 3.9%, while Germany stood at 3.8%. By contrast, unemployment remained substantially higher in Spain (10.5%), Türkiye (8.3%), Sweden (8.9%), and Finland (9.7%). Italy recorded an unemployment rate of 6.1% in 2025, broadly in line with the EFF aggregate. Overall, the data suggest that European labour markets remained stable, but

Table 2 – Manufacturing production, 2025

COUNTRY	GDP weight (%)	Manufacturing output, 2025 (% change)
Austria	2.6	+2.9
Belgium	3.3	–0.1
Czech Republic	1.8	+1.9
Denmark	2.1	–3.3
Finland	1.4	+1.5
France	15.2	+0.3
Germany	22.7	–1.1
Hungary	1.1	–3.1
Italy	11.5	–1.4
Netherlands	6.0	–0.4
Norway	2.4	+3.8
Poland	4.7	+3.5
Portugal	1.6	–1.5
Slovenia	0.4	–1.1
Spain	8.6	+0.7
Sweden	3.0	+5.8
Switzerland	4.7	+4.6
Türkiye	7.2	+2.4
EFF*	**100.0**	**+0.5**

** EFF: GDP-weighted average; weights recalculated excluding the UK, for which Eurostat data were not available. Production volume, unadjusted data. Source: Eurostat.*

significant structural differences in unemployment persisted across countries.

Manufacturing growth lags behind GDP expansion

The EFF manufacturing production index increased by 0.5% in 2025, a much weaker performance than the 1.4% GDP growth recorded for the same country sample. This gap highlights the different dynamics affecting the overall economy and the manufacturing sector.

While GDP benefited from resilient domestic demand and the continued expansion of services, manufacturing remained under pressure. Weak industrial demand, particularly in several large European economies, continued to weigh on factory output. Germany and Italy, which together account for around 34% of the EFF weighting, both recorded declines in manufacturing production.

These negative performances offset the stronger growth observed in countries such as Sweden, Switzerland, Norway and Poland. As a result, the weighted manufacturing indicator showed only marginal growth despite positive economic activity overall. The comparison suggests that the industrial recovery is lagging behind the broader economic expansion. Going forward, a stronger rebound in manufacturing will be necessary for industrial production to converge with overall GDP growth.

The major casting customer industries

The analysis of downstream foundry sectors is based on Eurostat industrial production trends for the main and most representative economic activity codes (NACE Rev. 2) along the value chain. Aggregate EFF variations have been calculated by weighting available country data according to each country's GDP share of total EFF GDP.

In 2025, the main downstream customer industries of the foundry sector showed an overall weak and differentiated performance. The transport equipment sector recorded mixed trends: the production of motor vehicles, trailers and semi-trailers declined by 1.4%, while the manufacture of other transport equipment increased by +4.3%, supported by more specific market segments.

Mechanical engineering remained broadly stable, with a slight decline in the production of machinery and equipment (-0.6%), reflecting the weakness of industrial investment activity across several European markets.

The steel industry recorded a moderate performance: the production of basic iron, steel and ferro-alloys increased marginally (+0.6%), while the manufacture of tubes, pipes, hollow profiles and related fittings in steel declined more significantly (-2.7%), highlighting continued pressure on industrial demand.

Table 3 – Industrial production in the main customer industries, EFF countries

Customer industry	NACE	Activity	2025 vs 2024 (%)
Vehicle construction	29	Motor vehicles, trailers and semi-trailers	–1.4
Vehicle construction	30	Other transport equipment	+4.3
Mechanical engineering	28	Machinery and equipment n.e.c.	–0.6
Steel industry	24.1	Basic iron and steel and ferro-alloys	+0.6
Steel industry	24.2	Tubes, pipes, hollow profiles and related fittings, of steel	–2.7
Construction	F	Construction	+2.3

Production volume, NACE Rev. 2; GDP-weighted EFF aggregate. Source: Eurostat.

The construction sector represented the most resilient area, with growth of +2.3%, showing stronger performance compared with the manufacturing segments.
Overall, the 2025 outlook points to a still fragile recovery among the main customer industries of the foundry sector, with positive developments concentrated in specific segments and industrial demand remaining generally subdued.

numbers

-1.4%

The decline in the production of motor vehicles, trailers and semi-trailers in Europe 2025

Focus on vehicle construction

Global motor vehicle production reached 96.4 million units in 2025, increasing by +4.0% compared with 2024 and by +3.0% compared with 2023, according to OICA (International Organization of Motor Vehicle Manufacturers). Growth was mainly driven by emerging countries, which produced 58.2 million vehicles, up +8% versus 2024 and +10% versus 2023. Conversely, developed countries recorded a slight decline, with production of 38.2 million units, down –1% compared with 2024 and –6% compared with 2023.
Asia-Oceania remains the world's largest production hub, with 59.2 million vehicles and +8% growth compared with 2024, supported mainly by China (+10%) and India (+8%). China further strengthened its position as the global production leader, reaching 34.5 million vehicles, accounting for more than one third of worldwide production. Europe is experiencing a phase of stagnation, with 17.2 million units, down –1% compared with 2024 and –5% compared with 2023. Within Europe, the European Union + United Kingdom recorded a –1% decline in 2025, confirming the ongoing challenges affecting the European automotive sector. Among the main European producers, Germany showed slight growth (+2%), while Italy (-20%), the United Kingdom (-16%) and Spain (-4%) recorded lower production compared with 2024. Türkiye maintained a positive trend, with +4% growth in 2025, confirming its role as an important regional manufacturing hub.
The Americas recorded a –2% decline compared with 2024, mainly due to lower production in North America, particularly in the United States (-3%) and Canada (-8%). South America showed a positive performance (+3%), supported mainly by Brazil (+4%).
The comparison with 2023 highlights stronger growth in Asia (+8%) and emerging markets (+10%), while Europe and other developed economies have not yet fully recovered previous production levels. Overall, 2025 confirms the shift of global automotive growth towards emerging markets, while industrialized countries continue to face a more challenging structural environment. This trend reflects weaker European demand, the technological transition towards electric vehicles, and the increasing concentration of production capacity in Asian markets. For the foundry industry, the data indicate a differentiated scenario: global automotive-related demand is expanding, but growth opportunities are increasingly concentrated in emerging markets rather than in Europe.

Table 4 – Global motor vehicle production by region (thousand units)

REGION	Year	Buses	Heavy trucks	Light comm. vehicles	Passenger cars	Total	Change (%)
Europe	2024	51	328	2,095	14,865	17,339	
	2025	47	289	1,986	14,879	17,201	–1
Americas	2024	35	702	13,657	4,754	19,148	
	2025	31	522	13,542	4,648	18,743	–2
Asia-Oceania	2024	208	2,587	4,856	47,351	55,002	
	2025	240	3,024	5,049	50,897	59,210	+8
Africa	2024	1	31	277	936	1,245	
	2025	1	32	313	907	1,253	+1
World	**2024**	**295**	**3,649**	**20,884**	**67,907**	**92,735**	
	2025	**320**	**3,866**	**20,889**	**71,332**	**96,407**	**+4**

Source: OICA Correspondents Survey.

The foundry industry in Europe

In 2025, the European foundry industry faced a differentiated operating environment, suffering from the weak and uneven performances observed in its main customer sectors, particularly automotive and mechanical engineering. At the aggregate level of EFF countries, total production recorded a 5.5% decline, standing at 12.3 million tonnes compared to 12.98 million in 2024. This drop in volumes was accompanied by a 5.7% decrease in total production value, which fell to €41.2 billion from €43.7 billion the previous year. Total employment in the sector fell to approximately 245,000 workers (–4.2%).
The dynamics of 2025 describe a European foundry sector that, despite operating in a slightly more favourable global macroeconomic framework compared to 2024, continues to face an internal market characterized by weak investments and a difficult recovery of the manufacturing industry, whose growth continues to lag significantly behind general GDP expansion. For the European foundry industry to consolidate its competitive position, a sustained recovery in machinery and vehicle manufacturing within EU borders will be essential, together with overcoming current geoeconomic tensions that threaten to heavily impact industrial demand and supply chains ahead of 2026.

Ferrous castings

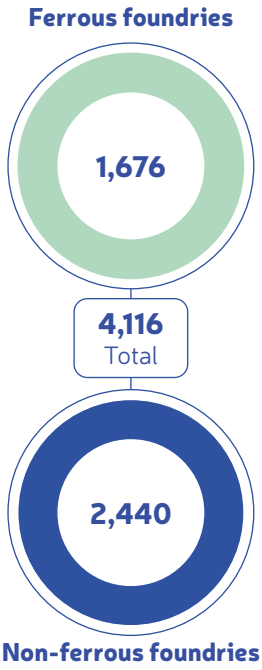
The ferrous metals segment continued to suffer from the critical issues of weak European industrial demand, heavily penalized by the stagnation of the automotive and commercial vehicle sectors on the European continent. The overall production of ferrous metal castings suffered a 6.2% contraction, closing 2025 at 8.83 million tonnes compared to 9.4 million the previous year. At the same time, production value showed an even more severe decline of 8.3%, falling to €21.2 billion. The erosion of volumes and margins also had repercussions on the operational and employment levels of the segment, which today counts just over 100,000 workers, highlighting the prolonged structural difficulties for European iron and steel foundries to return to historical production levels.

Non-ferrous castings

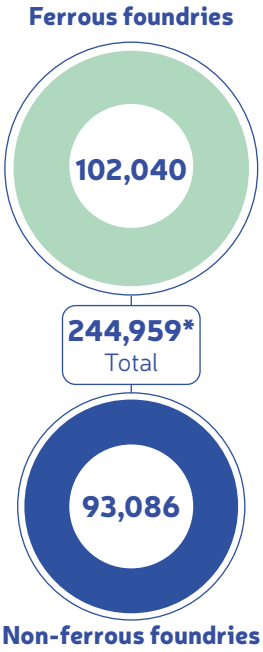
In contrast to the ferrous metals sector, the non-ferrous alloys segment showed greater resilience in 2025. Non-ferrous metal production limited its decline to 2.7%, reaching 3.48 million tonnes. Production value decreased by 4.1% compared with 2024, reaching a total value of €20.0 billion across the countries participating in the survey.
The resilience of this sector is closely linked to the demand for light alloy castings, which continue to benefit from the push of the technological transition towards component lightweighting and the spread of electric vehicles. Employment in non-ferrous metal foundries stood at almost 93,000 workers.

The European foundry industry at a glance

Number of foundries

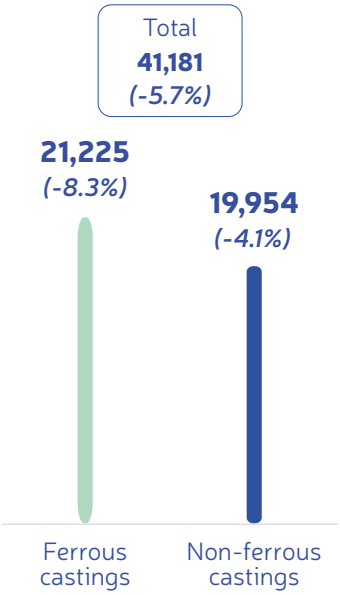


Number of employees



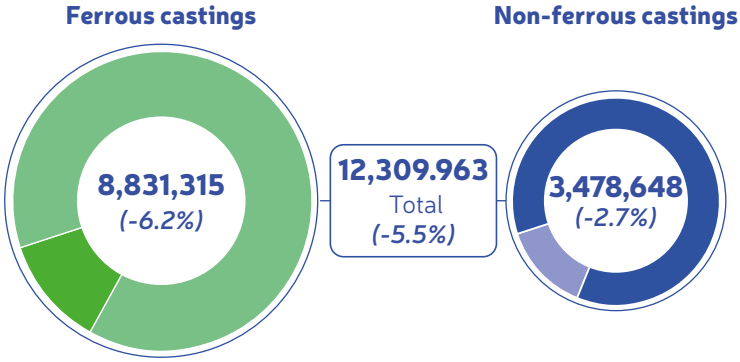
Production value

(million euros and % change 2025 vs. 2024)**



Production

(tonnes and % change 2025 vs. 2024)**



8,264.433 (-6%)
Iron castings

563,097 (-9.8%)
Steel castings

3,051,690 (-2.5%)
Light and ultralight castings

423,460 (-4.1%)
Other non-ferrous castings

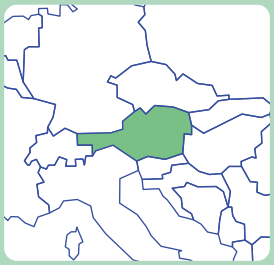
* *Sub-sector employment figures (~102,000 ferrous and ~93,000 non-ferrous) do not sum to the total (245,000) as several reporting countries provided aggregate employment data only.*
** *The % change was calculated on a comparable basis, considering only countries with actual surveyed data for both 2024 and 2025.*

European
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03

Country Reports





CAPITAL
Vienna

POPULATION IN 2025
9.18 million

GDP IN 2025 (CURRENT PRICES)
€ 534.50 billion
(+0.6% vs. 2024)

GDP PER CAPITA IN 2025 (CURRENT PRICES)
€ 58.213

UNEMPLOYMENT RATE (2025)
5.7%

CONSUMER PRICE (2025 VS. 2024)
3.6%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Austria

The Austrian foundry industry in 2025

Context

In 2025, the Austrian economy remained largely stagnant, with an estimated GDP growth of around 0.5%. Inflation remained elevated at an annual average of 3.5%, while the industrial sector was negatively impacted by U.S. tariff policies and intensified international competition, particularly from China.

Foundry Industry Performance

The foundry sector ended 2025 with declines in both production volumes and revenues. Total production stood at 268,772 tonnes (-0.5% compared to 2024), generating a total revenue of approximately €1.38 billion (-2.8%). The ferrous metal sector showed slight resilience: production increased by 0.7% (131,466 tonnes), with revenues growing by 0.9% to €494 million. Within this segment, ductile iron production grew by 3.2% (96,221 tonnes), offsetting the contractions in grey cast iron (30,390 tonnes, -4.7%) and steel castings (4,855 tonnes, -10.1%). Conversely, the non-ferrous segment recorded a negative trend, with a 1.6% drop in production volumes (137,306 tonnes) and a 4.7% decrease in revenues (approximately €889 million).

Key Challenges

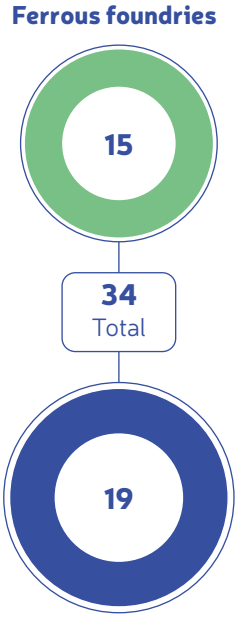
Austrian foundries are facing a very difficult market environment, characterized by a sharp drop in orders due to weak demand in the key mechanical engineering and automotive sectors. Operationally, high volatility in raw material prices and persistently high electricity and gas costs represent an ongoing challenge. Consequently, corporate investment plans are extremely cautious, constrained not only by the challenging economic climate but also by the burden of recent wage settlements. Furthermore, the implementation of upcoming environmental regulations and BAT (Best Available Techniques) requirements will necessitate additional structural and financial adjustments.

Employment and Outlook

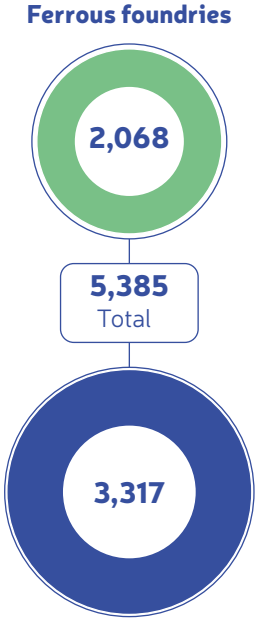
Employment experienced a sharp contraction in 2025: the total number of employees (including both white-collar and blue-collar workers) fell by 9.2% to 5,385. There was also a decline in the number of apprentices training for specific foundry professions. Labor costs will face further adjustments tied to collective agreements, with agreed increases of 1.41% in November 2025 and 1.9% in November 2026. The outlook for 2026 remains cautious. Although a baseline demand persists in domestic industry, particularly for mechanical engineering, cyclical fluctuations and increasing energy efficiency requirements will continue to complicate the overall picture. A potential stabilization of the sector will strongly depend on companies' ability to integrate new production methods and continuous technological improvements throughout the year.

Highlights Austria

Number of foundries

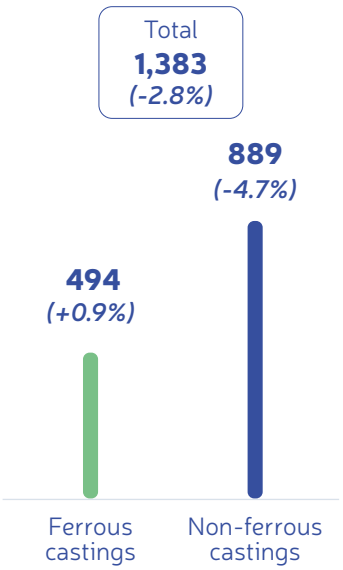


Number of employees



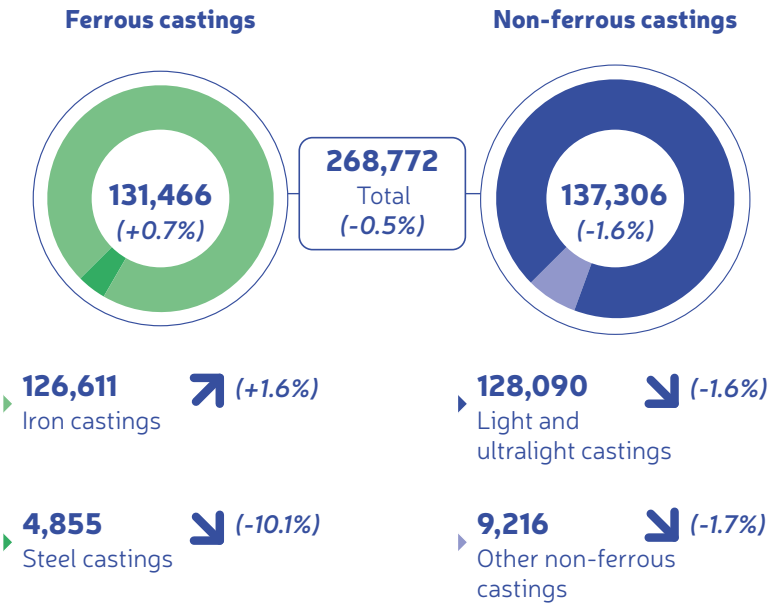
Production value

(million euros and % change 2025 vs. 2024)

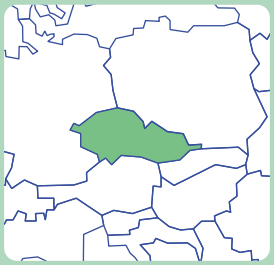


Production

(tonnes and % change 2025 vs. 2024)







CAPITAL
Prague

POPULATION IN 2025
10.90 million

GDP IN 2025 (CURRENT PRICES)
€ 358.54 billion
(+2.5% vs. 2024)

GDP PER CAPITA IN 2025
€ 32,883

UNEMPLOYMENT RATE (2025)
2.9%

CONSUMER PRICE (2025 VS. 2024)
2.5%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Czech Republic

The Czech foundry industry in 2025

Context

In late 2025, a new Czech government was formed with a strong mandate to address the challenges faced by energy-intensive industries. The political focus is now on revising Green Deal regulations and reopening discussions on the EU ETS to prevent deindustrialization and ensure that emission allowance revenues directly fund corporate decarbonization projects. Despite a national electricity surplus, domestic energy prices remain disproportionately high compared to the EU average.

Foundry Industry Performance

The decline in overall foundry production volumes finally halted in 2025, stabilizing at 2024 levels in terms of weight, while total turnover grew due to rising casting prices. The industry is increasingly shifting towards higher value-added products, with core and fettling shop capacities in many foundries exceeding 90% utilization. In the ferrous segment, cast iron production saw a slight increase of approximately 3% compared to 2024. However, steel castings fell to a historic low of 24,000 tons as soaring ferroalloy prices drove customers to seek alternative materials. Conversely, the non-ferrous sector performed well, driven by aluminum die-castings for the automotive industry, which recorded a 5% year-on-year growth supported by the ongoing transition to electromobility.

Key Challenges

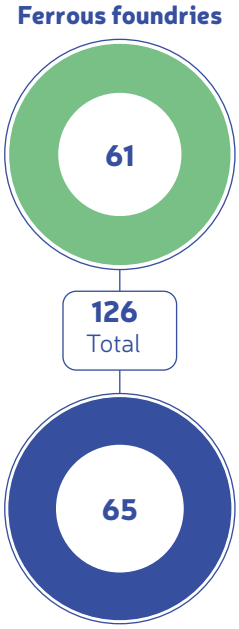
Competitiveness remains the most critical issue, severely undermined by exorbitant energy prices and environmental compliance costs, which led to the closure of eight notable foundries in 2025. The Carbon Border Adjustment Mechanism (CBAM) has driven up the cost of imported raw materials, while non-EU competitors often bypass these tariffs on finished castings through nomenclature loopholes. Furthermore, only iron foundries are currently included in the NACE list of sectors eligible for compensation for indirect emission costs, though efforts are underway to include steel and non-ferrous castings. Consequently, technological investments are heavily restricted due to market uncertainty and the financial strain of green requirements.

Employment and Outlook

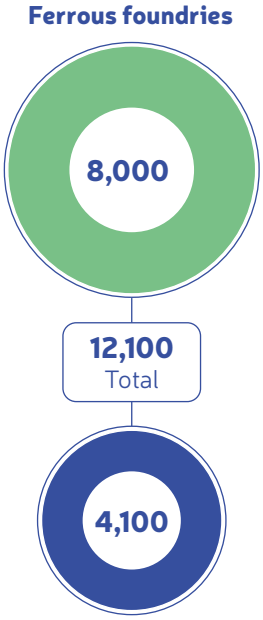
The Czech foundry industry currently employs about 13,000 regular workers, but a chronic shortage of qualified labor remains a constant bottleneck that threatens future growth. Surviving foundries have largely absorbed the workloads of the closed plants, helping to maintain overall production levels. The industry's outlook hinges heavily on the new government's success in lowering energy costs and securing EU ETS compensations. In the automotive supply chain, while electromobility presents new opportunities, intense price competition from Chinese manufacturers forces foundries to adopt a highly cautious approach to future investments.

Highlights Czech Republic

Number of foundries

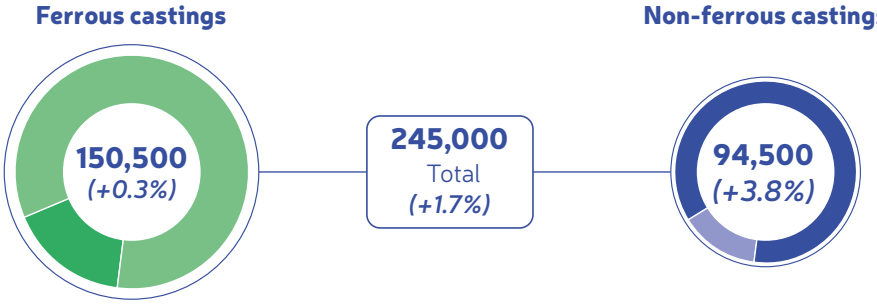


Number of employees



Production

(tonnes and % change 2025 vs. 2024)



126,500 Iron castings *(+1.2%)*

24,000 Steel castings *(-4.0%)*

83,000 Light and ultralight castings *(+6.0%)*

11,500 Other non-ferrous castings *(-9.4%)*





CAPITAL
Helsinki

POPULATION IN 2025
5.61 million

GDP IN 2025 (CURRENT PRICES)
€ 292.04 billion
(+0.2% vs. 2024)

GDP PER CAPITA IN 2025
€ 52,041

UNEMPLOYMENT RATE (2025)
9.7%

CONSUMER PRICE (2025 VS. 2024)
1.8%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Finland

The Finnish foundry industry in 2025

Context

In 2025, order books and new orders in the Finnish technology industry have strengthened significantly in spite of extraordinary trade and geopolitical volatility. Growth has been clearly driven by the shipbuilding industry, but the last quarter of 2025 was surprisingly upbeat for the sector as a whole.

Foundry Industry Performance

The production of iron castings increased by approximately 15% in 2025. Notably, the share of exports in iron castings increased by over 30%. The production of steel castings remained at the low 2024 level. The production volumes of aluminium and copper alloys increased by approximately 5%. However, the value of total foundry production in 2025 remained at the 2024 level despite the increase in production volumes.

Key Challenges

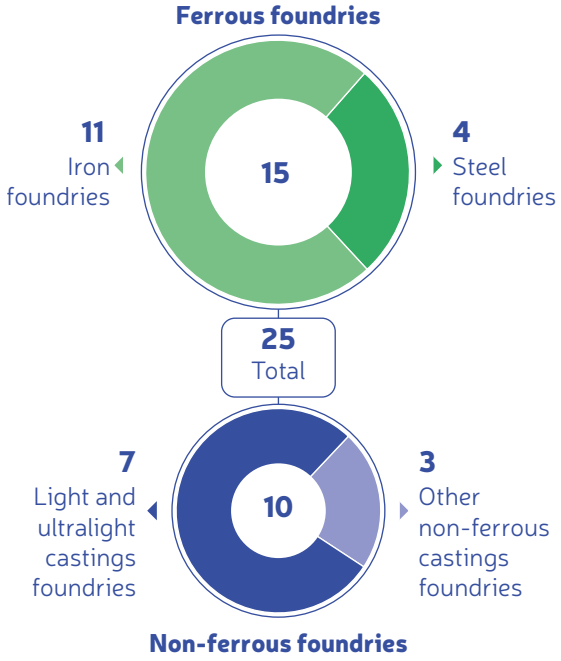
Current main problems/challenges faced by the Finnish foundry industry are: number of customer orders, i.e. low volume and short order book, how to educate skilled foundry workers (in Finland both university and vocational education and training is in transition) and regulation through the EU.

Employment and Outlook

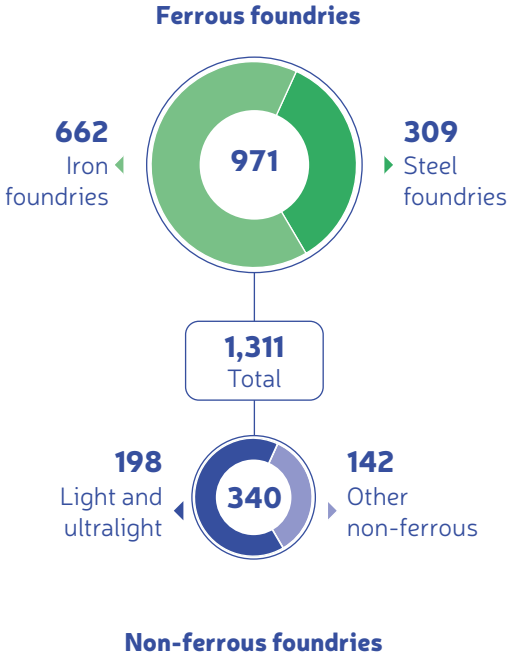
The number of employees in Finnish foundries is decreasing slightly, the annual decrease was approximately 4% in 2025. A volume growth of approximately 10% in foundry production volumes is expected for 2026. The competitive advantages of the Finnish foundry industry in the future will include, among others, relatively cheap and green energy and, consequently, the low carbon footprint of cast products.

Highlights Finland

Number of foundries

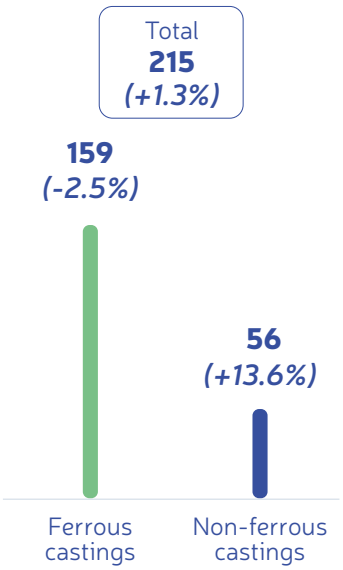


Number of employees



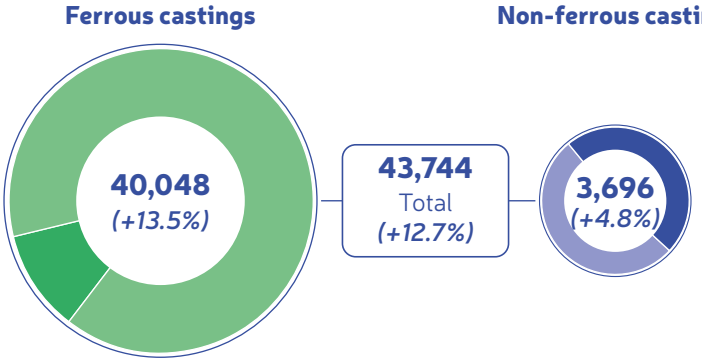
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)



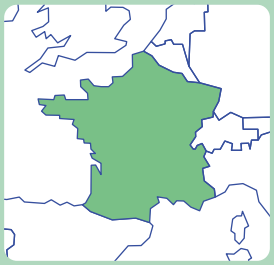
35,723 Iron castings (+13.3%)

4,325 Steel castings (+14.8%)

1,747 Light and ultralight castings (+3.3%)

1,949 Other non-ferrous castings (+6.2%)





CAPITAL
Paris

POPULATION IN 2025
68.85 million

GDP IN 2025 (CURRENT PRICES)
€ 3,105 billion
(+0.9% vs. 2024)

GDP PER CAPITA IN 2025
€ 45,097

UNEMPLOYMENT RATE (2025)
7.6%

CONSUMER PRICE (2025 VS. 2024)
0.9%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

France

The French foundry industry in 2025

Context

French GDP increased by +0.9% in 2025. This economic growth is due to the increase in domestic demand. Household consumption increased by +0.5% in 2025. Business investment stayed stable with +0.2% in volume over the whole of 2025.

Foundry Industry Performance

The French foundry industry experienced a sharp decrease in production, falling from 1,422,611 tonnes in 2024 to 1,275,481 tonnes in 2025 (-10.3%). The percentage decrease in ferrous and non-ferrous foundry production is similar (-10.7% and -8.4%, respectively). However, the turnover has experienced a smaller decline than production with a fall of -4.1% between 2024 and 2025.

Key Challenges

A major concern is that the survival of certain companies is compromised by escalating cash flow pressures. Another important challenge is to successfully stabilize production volumes for the coming years.

Employment and Outlook

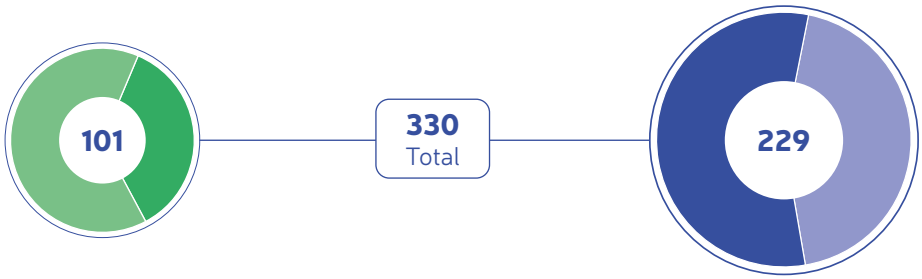
Employment remains stable in 2025, with 28,501 employees against 28,507 in 2024. However, the foundry sector could face a loss of skilled employees. This poses a significant risk to the transmission of technical know-how, driven both by upcoming retirements and the industry's declining appeal to younger talent.
With the conflict in the Middle East at the beginning of 2026, we can expect a huge increase in the price of energy. Nevertheless, most companies were hedged against rising energy prices, mitigating the overall impact on the sector.
In terms of production, we are expecting a small decrease in the foundry industry for the upcoming year.

Highlights France

Number of foundries

Ferrous foundries

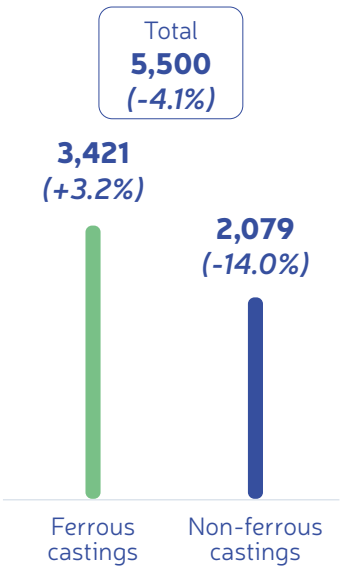
Non-ferrous foundries



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

Production value

(million euros and % change 2025 vs. 2024)

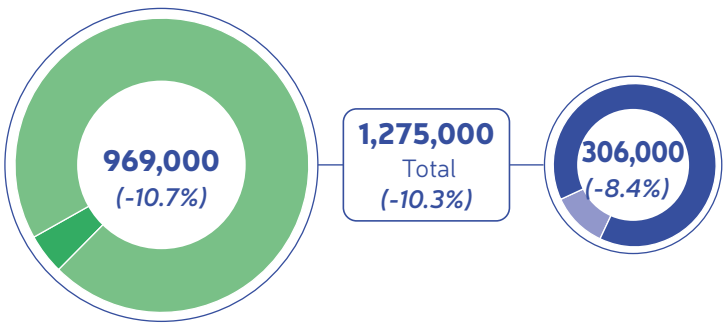


Production

(tonnes and % change 2025 vs. 2024)

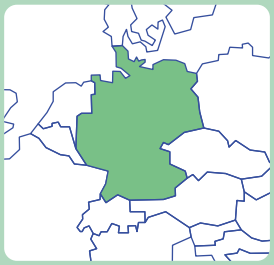
Ferrous castings

Non-ferrous castings



- **935,850** Iron castings ↘ *(-9.9%)*
- **33,150** Steel castings ↘ *(-31.1%)*
- **274,125** Light and ultralight castings ↘ *(-7.8%)*
- **31,875** Other non-ferrous castings ↘ *(-13.1%)*





CAPITAL
Berlin

POPULATION IN 2025
83.52 million

GDP IN 2025 (CURRENT PRICES)
€ 6,652.59 billion
(+0.2% vs. 2024)

GDP PER CAPITA IN 2025
€ 55,704

UNEMPLOYMENT RATE (2025)
3.8%

CONSUMER PRICE (2025 VS. 2024)
2.3%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Germany

The German foundry industry in 2025

Context

After two years of recession, the German economy returned to marginal growth in 2025. Price-adjusted GDP rose by 0.2%, supported mainly by private and public consumption, while weak investment, subdued exports and continued pressure on manufacturing limited demand for castings.

Foundry Industry Performance

German foundries produced approximately 3.26 million tonnes in 2025, around 3.4% less than in 2024. Iron and steel casting output fell by 2.9% to 2.494 million tonnes, while non-ferrous casting output declined by 4.8% to 763,000 tonnes. Sector turnover decreased more sharply, by 7.5%, to approximately EUR 11.3 billion: EUR 6.3 billion in iron and steel castings and EUR 5.0 billion in non-ferrous castings. Average capacity utilisation rose from 73.0% in 2024 to 75.3% but remained well below the long-term average of around 82%, confirming persistent underutilisation. Within the ferrous segment, output for vehicle manufacturing fell by 3.0%, whereas mechanical-engineering demand provided some support and production increased by 4.0%. In non-ferrous casting, aluminium output declined by 3.9% to 596,000 tonnes; magnesium and zinc castings recorded particularly sharp falls of 13.5% and 33.7%, respectively, while copper-alloy castings increased marginally by 0.4%.

Key Challenges

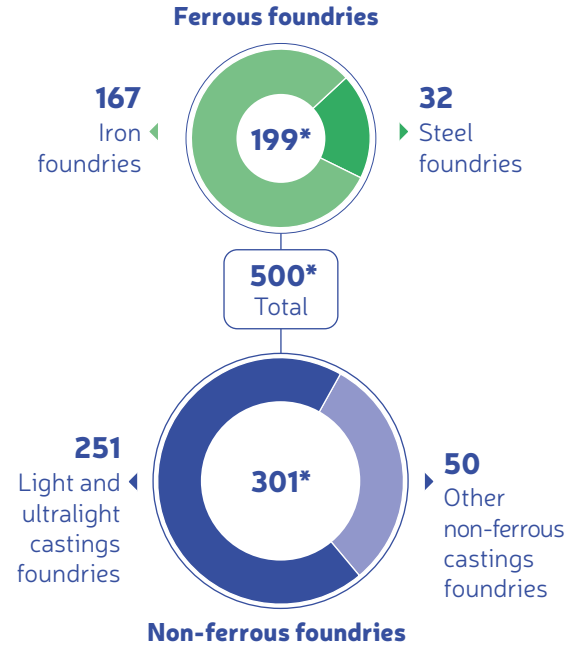
The most immediate challenge remained weak demand from key customer industries, especially automotive, combined with increasing price pressure from Asian imports. The expansion of US tariffs in 2025 also raised the risk that trade flows would be diverted towards the EU market. At the same time, German foundries continued to face internationally uncompetitive energy costs. The fixed price under Germany's national emissions trading system rose from EUR 45 to EUR 55 per tonne of CO_2 in 2025. Finally, companies must finance major investments in electrification, energy efficiency and low-carbon production while capacity utilisation and margins remain low. Lengthy grid connections, permitting procedures and growing reporting obligations further weaken the investment climate, particularly for SMEs.

Employment and Outlook

The sector comprises roughly 545 companies and 67,700 employees; employment continued to decline in 2025 as prolonged underutilisation led to restructuring and job losses. For 2026, the BDG expects production to remain broadly flat, implying stabilisation at a low level rather than a genuine recovery. A sustained upturn requires competitive energy prices, effective carbon-leakage protection, faster grid connections and permitting, proportionate regulation and protection against unfair trade. Electrification, digitalisation and changing component requirements in the automotive transition will continue to reshape the industry over the medium term.

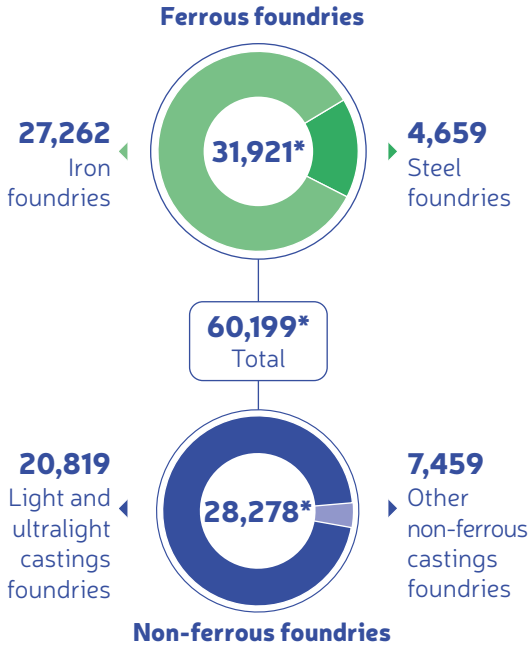
Highlights Germany

Number of foundries



*>50 employees

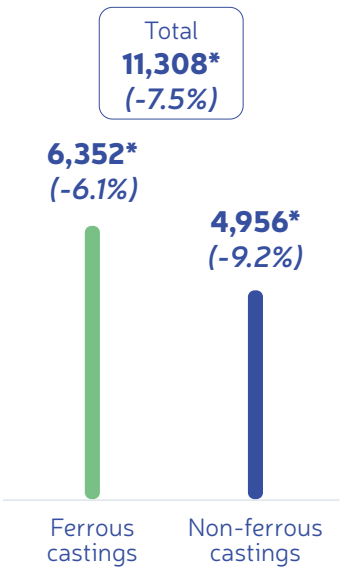
Number of employees



*>50 employees

Production value

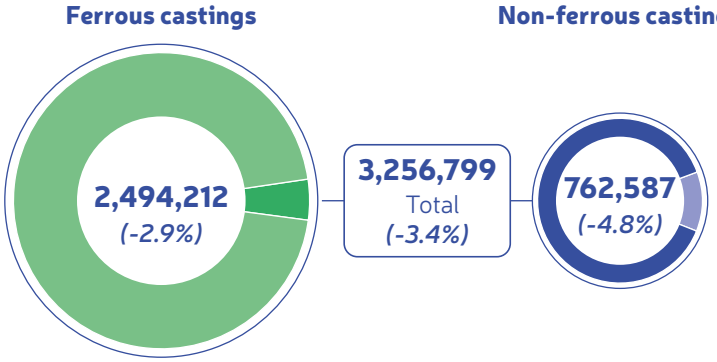
(million euros and % change 2025 vs. 2024)



*>50 employees

Production

(tonnes and % change 2025 vs. 2024)



2,379,250 Iron castings ↘ *(-3.1%)*

676,623 Light and ultralight castings ↘ *(-4.5%)*

114,962 Steel castings ↗ *(+1.8%)*

85,964 Other non-ferrous castings ↘ *(-7.0%)*

*>50 employees





CAPITAL
Budapest

POPULATION IN 2025
9.56 million

GDP IN 2025 (CURRENT PRICES)
€ 227.55 billion
(+0.4% vs. 2024)

GDP PER CAPITA IN 2025
€ 23,803

UNEMPLOYMENT RATE (2025)
4.3%

CONSUMER PRICE (2025 VS. 2024)
4.4%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Hungary

The Hungarian foundry industry in 2025

Context and Foundry Industry Performance

Numerous external and internal factors influenced the foundries' performance in 2025; the most significant of these were: energy volatility, volatile order backlog and portfolio diversification.

The greatest uncertainty stemmed from the volatility of energy prices. As a new trend, during the summer period, the spot price of electricity sometimes fluctuated by as much as tenfold within a single day. The decline in global energy prices was reflected only to a limited extent in Hungarian end-user energy prices, largely due to disproportionately high levels of special taxes and system usage fees. Most foundries were unable to pass these extra costs on to their customers, which represented a significant competitive disadvantage for Hungarian foundries in international markets.

The order backlog fluctuated significantly throughout the year, affecting industrial segments differently, primarily due to significant exposure to changes in German industrial output.

Several foundries supplying the automotive industry are seeking orders from other industrial segments to broaden their product range, but foundries are undertaking few new developments, as market resources have become extremely expensive and the economic environment is fraught with uncertainty.

Those foundries that, despite the above challenges - perhaps by diversifying their product portfolio - were able to retain their existing customers and/or acquire new ones have had a year that surpassed the previous year's results.

Key Challenges

The Green Transition is becoming an increasingly significant challenge for the industry - and this pressure is expected to grow - that some customers now expect foundries to disclose and verify the carbon footprint of all their products and to continuously reduce it. This is having an increasingly significant impact on the procurement of raw materials and energy as well. Foundries must implement significant improvements in the interest of the "Green Transition". The expected phase-out of internal combustion engines represents another source of uncertainty; all stakeholders must prepare for this in a timely manner.

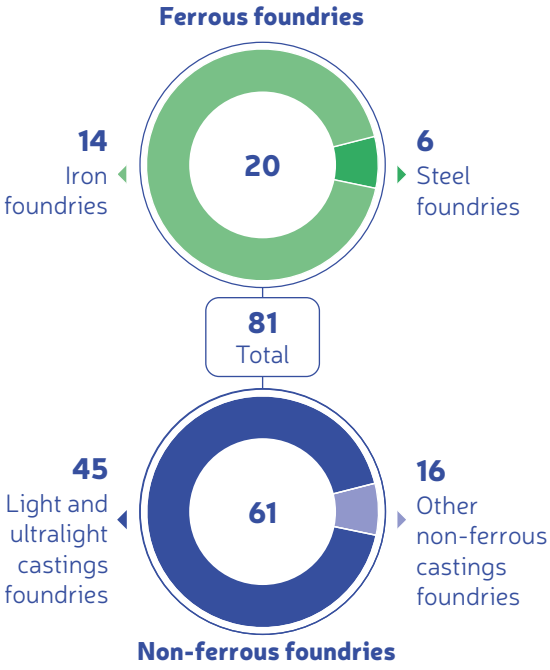
Employment and Outlook

Unlike in previous years, there was an adequate workforce available, mainly thanks to Asian guest workers. Currently, no students are enrolled in the domestic intermediate-level foundry training program, and there were no applicants for adult education either. We are working to spark young people's interest in casting with a revamped, modern curriculum. More students enrolled in higher education this year than in previous years.

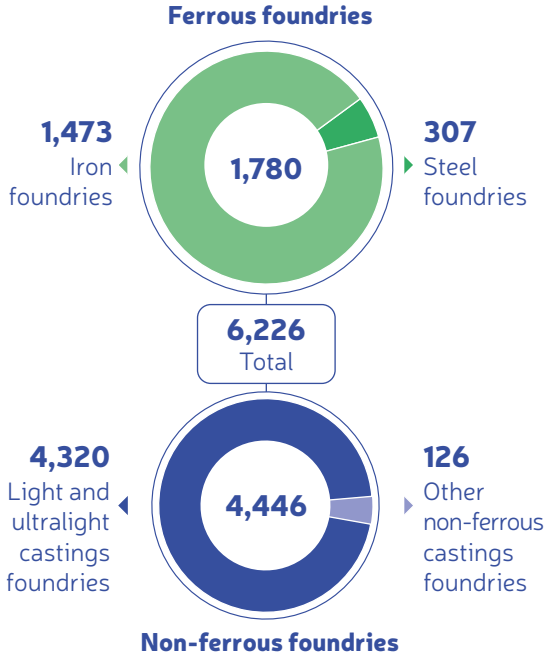
The current global crises are causing a great deal of uncertainty, which is having a significant impact on the availability of energy sources and energy prices. The green transition and stricter regulations are creating additional challenges. Together, these factors could lead to the closure of small and medium-sized foundries.

Highlights Hungary

Number of foundries

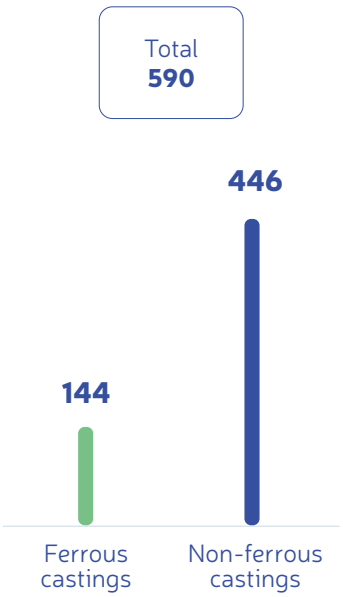


Number of employees



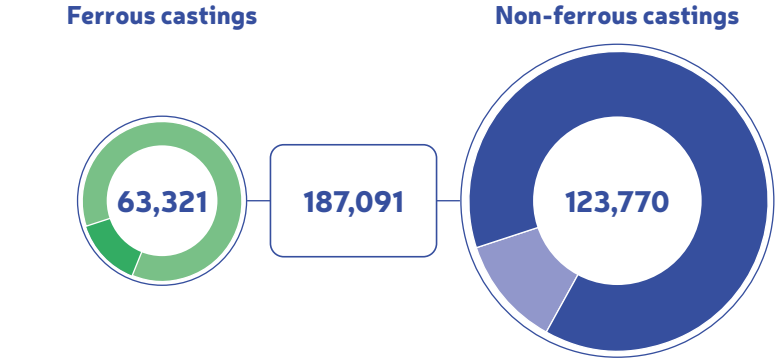
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)



63,059
Iron castings

123,109
Light and ultralight castings

262
Steel castings

661
Other non-ferrous castings





CAPITAL
Rome

POPULATION IN 2025
58.93 million

GDP IN 2025 (CURRENT PRICES)
€ 2,350.33 billion
(+0.5% vs. 2024)

GDP PER CAPITA IN 2025
€ 39,880

UNEMPLOYMENT RATE (2025)
6.1%

CONSUMER PRICE (2025 VS. 2024)
1.6%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Italy

The Italian foundry industry in 2025

Context

In Italy, GDP increased by 0.5% in real terms in 2025. Growth was supported by domestic demand (+1.5 percentage points), driven by household consumption (+1.0%) and a recovery in gross fixed investment (+3.5%, following a 3.1% decline in the previous year). The industrial production index in volume terms recorded a slight decrease (-0.3%), following the sharp contractions seen over the previous two years. Weakness in energy-intensive industries and consumer goods was partly offset by the resilience of high-technology activities.

Foundry Industry Performance

Foundry production fell by 1.6% to 1.61 million tonnes, marking the third consecutive year of decline and bringing production levels below those recorded during the 2009 financial crisis. Since the 2021 peak, the sector has lost more than 330,000 tonnes of production, while compared with the all-time high recorded in 2007, output has now fallen by more than 40%.
Ferrous castings production stood at 847,864 tonnes, down 0.9% from the previous year, and currently accounts for around 52.7% of total foundry production.
Non-ferrous castings, on the other hand, recorded a sharper decline in 2025, falling by 2.4% to 759,665 tonnes. The decrease was the same in both subsectors: aluminium, magnesium and superalloy foundries, and zinc, copper and other non-ferrous metal alloy foundries.
Total turnover remained broadly stable at € 6.38 billion (down 0.1% on 2024), but only thanks to a 4% rise in producer prices: volumes continued to fall and margins came under pressure. Ferrous foundries recorded turnover of €2.19 billion, down 1.0% from the previous year. This was the third consecutive decline, following decreases of 5.4% in 2023 and 17.2% in 2024. Non-ferrous foundries moved in the opposite direction, with turnover up 0.5% to € 4.19 billion.

Key Challenges

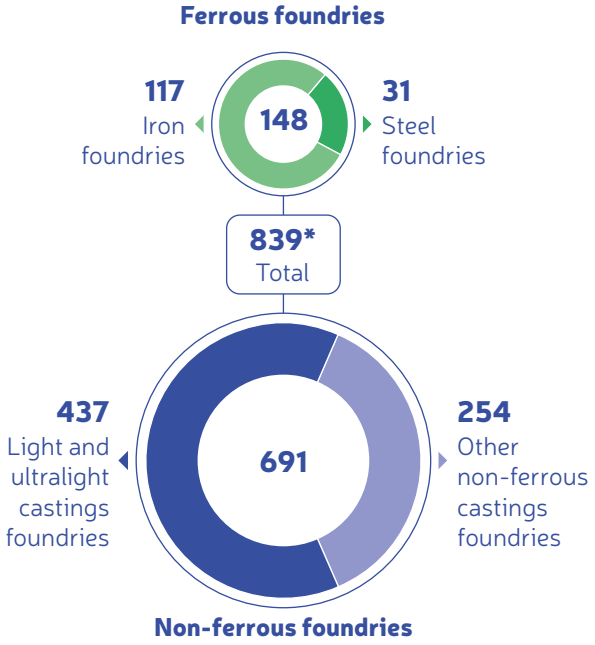
The sector's main challenges are high energy costs, well above those faced by non-EU competitors and by other major European countries, where electricity is considerably cheaper than in Italy. CBAM is another key issue and needs to be revised to prevent effects contrary to its purpose. Foundries depend on raw materials such as pig iron and certain ferroalloys, which the EU barely produces, so applying a CO_2 cost to these imports protects no European producer and only penalises foundries against non-EU competitors.

Employment and Outlook

Employment in the sector has fallen sharply, from 34,696 employees in 2008 to 24,316 in 2024 (the latest data available), in line with a drop in the number of active companies from 1,225 to 839. Even so, most foundries are still looking to recruit, particularly skilled workers, but struggle to find candidates with the right skills and qualifications. For 2026, Assofond expects production to remain broadly at 2025 levels: despite some weak positive signals in late 2025, economic momentum stayed subdued in the first half of 2026 and was too weak to generate a significant rebound.

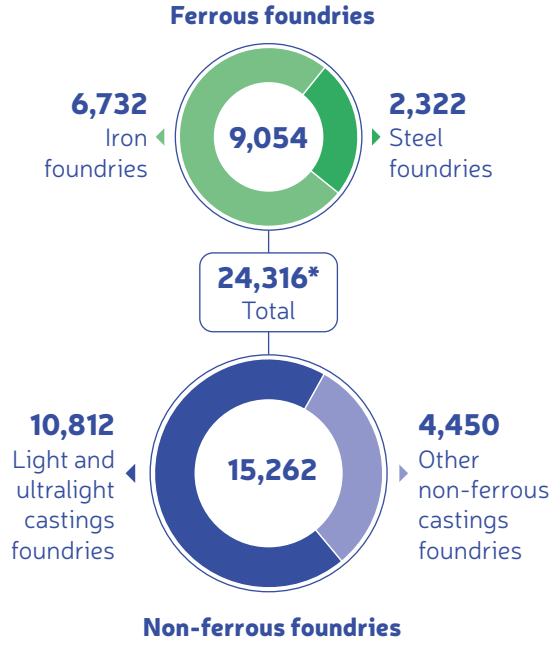
Highlights Italy

Number of foundries



*2024

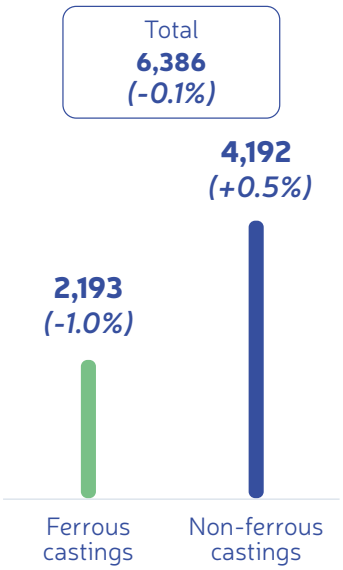
Number of employees



*2024

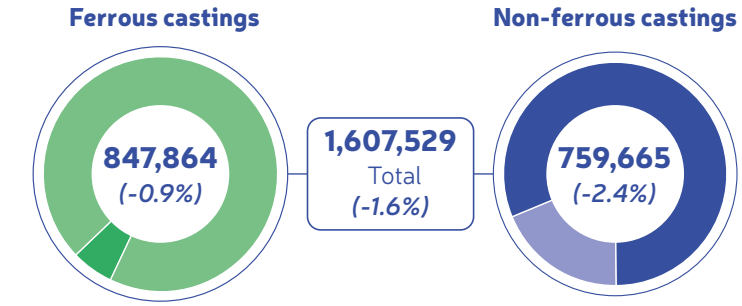
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)

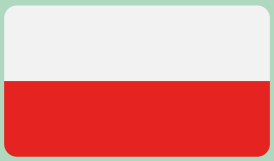


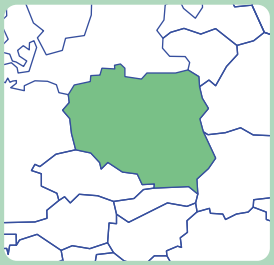
795,956 Iron castings (-1.5%)

51,908 Steel castings (+7.7%)

616,397 Light and ultralight castings (-2.4%)

143,268 Other non-ferrous castings (-2.4%)





CAPITAL
Warsaw

POPULATION IN 2025
36.50 million

GDP IN 2025 (CURRENT PRICES)
€ 954.46 billion
(+3.6% vs. 2024)

GDP PER CAPITA IN 2025
€ 26,151

UNEMPLOYMENT RATE (2025)
3.1%

CONSUMER PRICE (2025 VS. 2024)
3.6%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Poland

The Polish foundry industry in 2025

Context

Polish economy recorded solid growth in 2025, remaining among the fastest-growing large economies in the EU. Real GDP increased by 3.6%, accelerating from 3.0% in 2024. Industry also improved, with gross value added rising by approximately 3.0%. The unemployment rate averaged 3.1%, remaining among the lowest in the EU.

Foundry Industry Performance

Polish foundry industry experienced another challenging year in 2025 as the recovery of European manufacturing remained gradual and uneven. Although Poland's industrial production improved during the year, demand from major casting consumers remained below pre-crisis expectations. Export-oriented foundries benefited from Poland's competitive manufacturing base, but weak investment activity across Western Europe continued to constrain order volumes.

Polish foundry industry (180 iron foundries, 35 steel foundries, 240 non-ferrous foundries) produced 784,556 tons of castings in 2025, including 629,514 tons of ferrous castings (increase by 4.3% in comparison to 2024, 80,2% of total production) and 155,042 tons of non-ferrous castings (19,8% of total production, increase by 0,3% from 2024).
It is divided into: grey iron castings: 440,859 tons (increase by 6.4 % in comparison to 2024), ductile iron castings: 173,836 tons (decrease by 1.7%), steel castings: 14,819 tons (increase by 14.6%).
Non-ferrous castings: aluminum 154,387 tons (increase by 0,3%), other non-ferrous metals castings 655 tons (decrease by 4.7%)

Key Challenges

Weak European Industrial Demand
The principal challenge facing the Polish foundry industry in 2025 was subdued demand from European manufacturing. Automotive production – the main market - although improving compared with previous years, remained below historical levels in several major EU markets. Machinery manufacturers and construction equipment producers also delayed investment decisions because of slower economic growth and high financing costs. Consequently, foundries experienced strong price competition and continued pressure on operating margins.

High Production and Energy Costs
Energy-intensive foundry operations continued to face elevated production costs. Many companies responded by investing in induction furnaces, waste heat recovery systems, digital process control and energy-efficient melting technologies.

Employment and Outlook

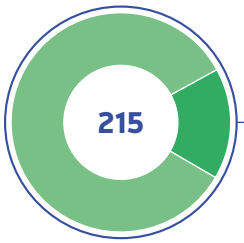
Employment in the Polish foundry industry remained broadly stable during 2025, although gradual workforce reductions through retirement continued to be offset by increased automation and digitalization. The sector remains an important employer within Polish metalworking, with approximately 20,000 employees (decrease by 0,03%).

The outlook for the Polish foundry industry is cautiously optimistic. A gradual recovery in European manufacturing, together with growing investment in defense, renewable energy infrastructure, rail transport and industrial equipment, is expected to support casting demand over the medium term. Long-term competitiveness will depend on continued investment in automation, digital manufacturing, energy efficiency and environmental performance.

Highlights Poland

Number of foundries

Ferrous foundries



455
Total

Non-ferrous foundries

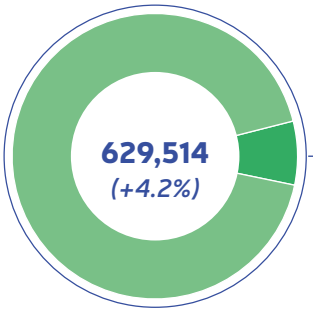


- **180** Iron foundries
- **35** Steel foundries
- **240** Light and ultralight castings foundries
- **0** Other non-ferrous castings foundries

Production

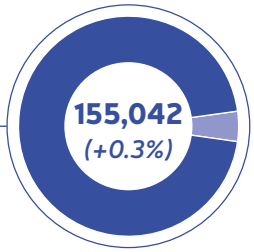
(tonnes and % change 2025 vs. 2024)

Ferrous castings



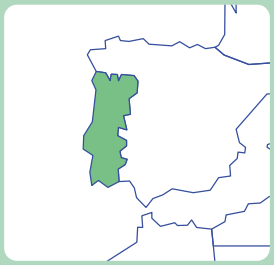
784,556
Total
(+3.4%)

Non-ferrous castings



- **614,695** Iron castings *(+4.0%)*
- **14,819** Steel castings *(+14.6%)*
- **154,387** Light and ultralight castings *(+0.3%)*
- **655** Other non-ferrous castings *(-4.7%)*





CAPITAL
Lisbon

POPULATION IN 2025
10.77 million

GDP IN 2025 (CURRENT PRICES)
€ 319.27 billion
(+1.9% vs. 2024)

GDP PER CAPITA IN 2025
€ 29,646

UNEMPLOYMENT RATE (2025)
6.0%

CONSUMER PRICE (2025 VS. 2024)
2.2%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Portugal

The Portuguese foundry industry in 2025

Context

In 2025, the foundry sector in Portugal faced a combination of cyclical factors (slowdown in European industrial demand) and structural challenges (energy transition, labour, and international competition). Being a heavily export-oriented industry integrated into European value chains, the difficulties experienced by its main clients directly impacted national foundries.

Foundry Industry Performance

In 2025, the outcome of the Portuguese foundry industry was 170,467 tonnes, 119,787 tonnes from the ferrous sector and 50,680 tonnes from the non-ferrous sector, which means a decrease of 0.5% in the ferrous sector and an increase of 4.0% in the non-ferrous sector.
Sales increased 6.5% for ferrous and 4.1% for non-ferrous, result of a turnover of 273.4M€ and 368.2M€, respectively, totalizing 641.6M€, which means a global increase of 5.1% compared to the previous year.
Regarding the ferrous sector, compared to the previous year, in 2025 there was a sharp decrease in grey iron castings production of 14.6%, while for nodular and steel, there was an increase of 6.1% and 2.5%, respectively.
In the non-ferrous sector, compared to the previous year, in 2025 there was an increase in production in all alloys: 8.5% for copper, 6.7% for zinc and 1.9% for light castings.

Key Challenges

The main cyclical challenge was the weakness in demand from client sectors, especially the automotive sector. This was driven by competition from Chinese brands, the technological transformation of the automotive industry (electrification, digitalization and regulatory pressure on combustion engines) which increased uncertainty regarding the future demand for certain cast components (requiring adaptation from manufacturers) and also the uncertainty caused by trade tariffs imposed by the US.
The Portuguese foundry industry is deeply linked to car manufacturers and their suppliers with an involvement of 70% of the global production, which increases its vulnerability to specific economic cycles in this sector.
Environmental regulations and current limitations regarding the implementation of a fully-fledged Circular Economy represent another challenge for the sector, incurring significant costs due to the disposal of foundry sand waste in landfills instead of its incorporation into other industrial sectors.
Another concern for the sector relates to the implementation of the new BREF-SF and the resulting impacts, as substantial investment will be required within a brief period.

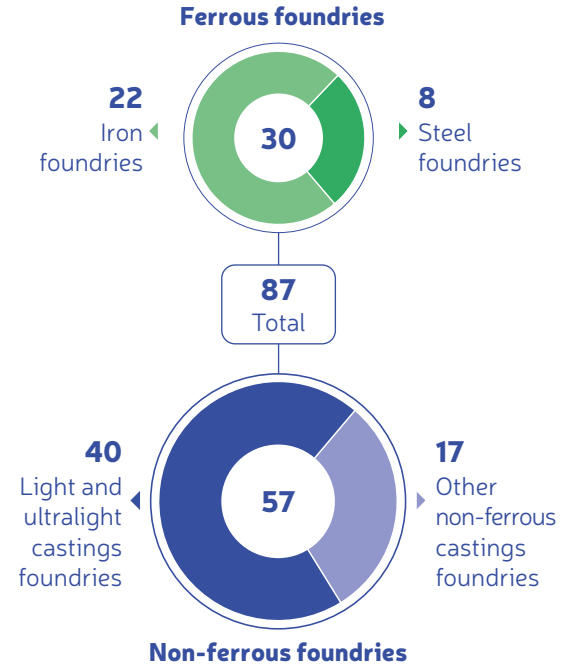
Employment and Outlook

The availability of skilled labour remains as a structural problem for the Portuguese manufacturing industry in general, and particularly for the foundry sector. The sector needs workers with specific technical skills in metallurgical processes, industrial maintenance, automation and process control. The challenge is aggravated by several factors: aging industrial workforce, difficulty in attracting young people to industry, competition from other sectors for qualified technicians; and increasing wage pressure to retain talent.
Comparing the overall employment figures for the sector, is observed an increase of 0.3% in 2025, from 5,590 to 5,608 workers.
Analysing the available data in each subsector, is observed a decrease of 6.5% for ferrous and an increase of 6.0% for non-ferrous.

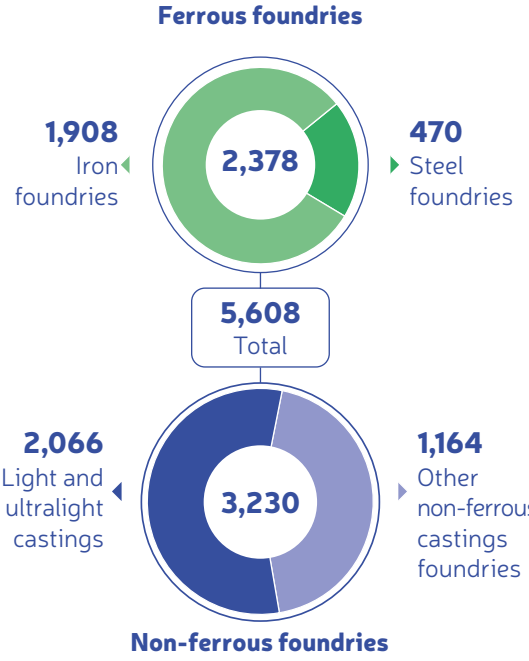


Highlights Portugal

Number of foundries

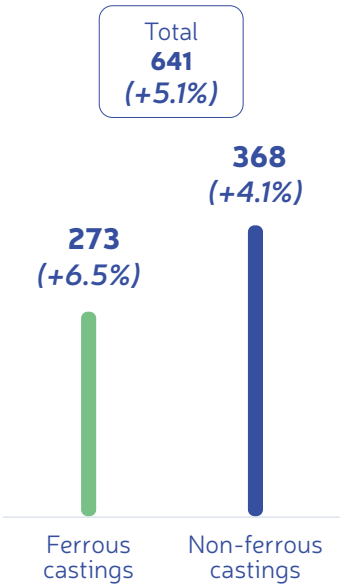


Number of employees



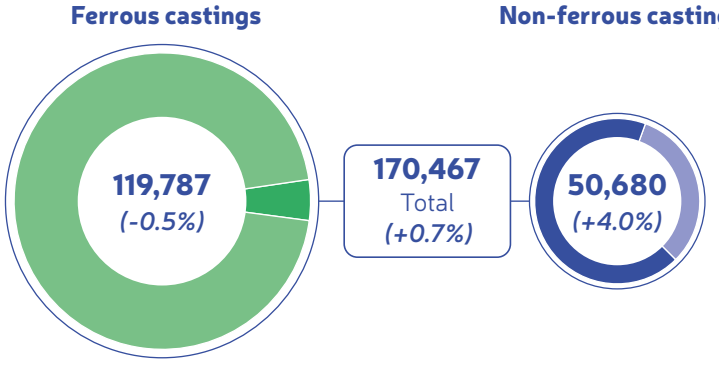
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)

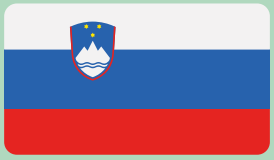


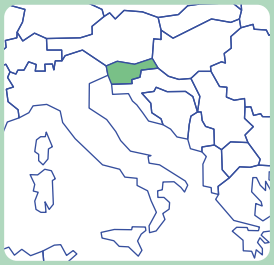
115,835 Iron castings *(-0.6%)*

33,444 Light and ultralight castings *(+1.9%)*

3,952 Steel castings *(+2.5%)*

17,236 Other non-ferrous castings *(+8.3%)*





CAPITAL
Ljubljana

POPULATION IN 2025
2.13 million

GDP IN 2025 (CURRENT PRICES)
€ 73.41 billion
(+1.1% vs. 2024)

GDP PER CAPITA IN 2025
€ 34,448

UNEMPLOYMENT RATE (2025)
3.9%

CONSUMER PRICE (2025 VS. 2024)
2.5%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Slovenia

The Slovenian foundry industry in 2025

Context

Under the baseline scenario, which does not assume persistently elevated oil and gas prices or disruptions to their supply, Slovenia's GDP growth is projected to strengthen to 2.0% this year and maintain a similar pace over the following two years. The export sector is expected to gradually recover, driven by improved industrial activity among the country's main trading partners.

Foundry Industry Performance

The Slovenian foundry industry experienced a broad-based contraction in 2025, with total production falling to 137,020 tonnes – a 10% decrease compared to the 150,665 tonnes recorded in 2024, continuing the downward trend from 2023 (168,253 tonnes).

In the ferrous segment, grey iron output declined by 11% to 38,644 tonnes, ductile iron fell by 6% to 32,340 tonnes, and steel castings contracted by 8% to 3,794 tonnes. Malleable iron remained the only stable category at 3,000 tonnes, while other ferrous cast irons registered a minor 15 tonnes. Within the non-ferrous segment, copper alloys dropped by 6% to 878 tonnes. Aluminium alloys, which represent the largest share of national production, fell sharply by 12% to 50,048 tonnes, significantly impacting the overall foundry output. Conversely, zinc was the sole growing sector, posting a marginal increase to 5,133 tonnes (up from 4,946 tonnes), while magnesium alloys recorded zero production. Other unclassified castings decreased by 9% to 3,168 tonnes.

This production decline directly impacted financial performance. Sales revenues fell to EUR 878.8 million in 2025, down from EUR 922.9 million in 2024 and a peak of EUR 1.01 billion in 2023. Despite the contraction, the sector remains highly export-dependent: international sales accounted for 84.2% of the total, reaching EUR 739.6 million in 2025.

Key Challenges

The Slovenian foundry industry faces many of the same structural challenges as its counterparts in neighbouring countries and across the European Union. These include high energy prices and energy-related crises, market restructuring that has led to declining demand, excessive procedural formalism that hinders the effective implementation of measures, and a rigid regulatory framework in both industrial and environmental policy, as is the case of the BATs and the uncertainty regarding the CBAM.

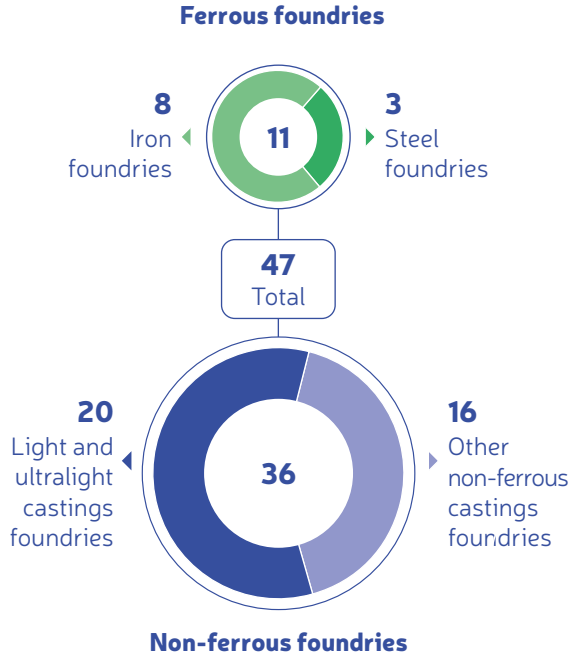
Employment and Outlook

The challenges facing the Slovenian foundry industry are also reflected in employment trends. After remaining relatively stable at around 4,900 employees between 2021 and 2023, the workforce declined from 4,978 in 2023 to 4,836 in 2024 and 4,657 in 2025, a loss of more than 300 jobs over two years. At the same time, labour costs rose significantly, driven by government reforms, including increases in the statutory minimum wage, mandatory winter bonuses etc. As a result, average gross monthly wages in the foundry sector increased from EUR 1,933 in 2021 to EUR 2,447 in 2025, placing further pressure on the industry's competitiveness.

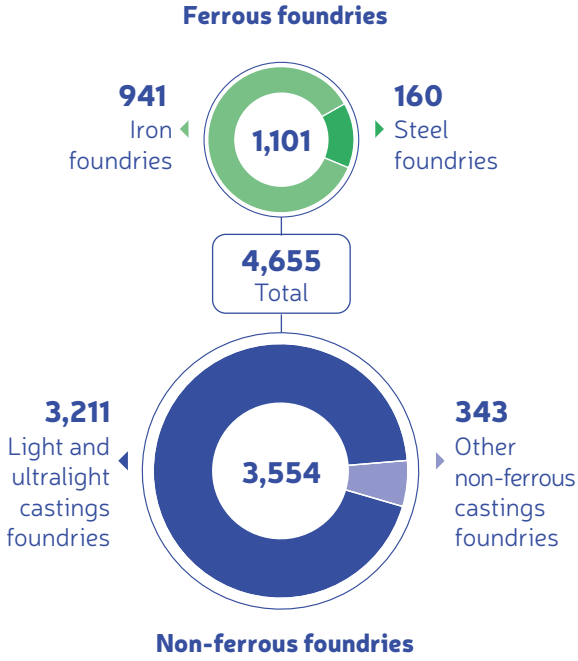


Highlights Slovenia

Number of foundries

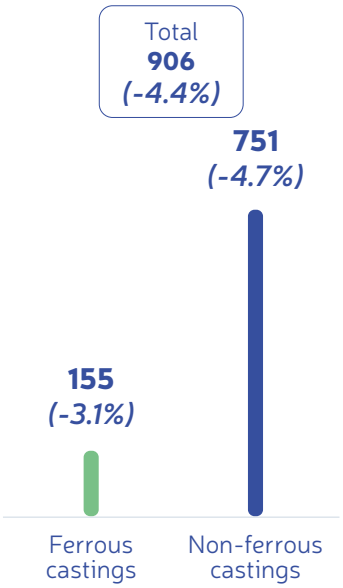


Number of employees



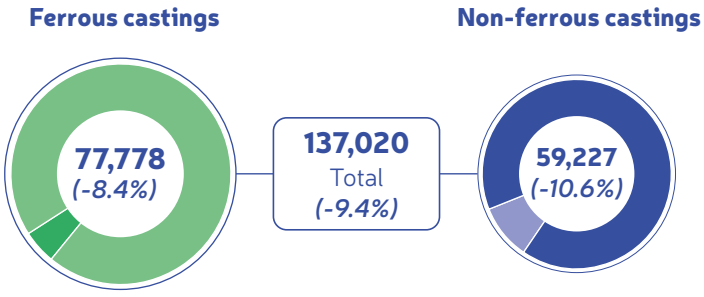
Production value

(million euros and % change 2025 vs. 2024)



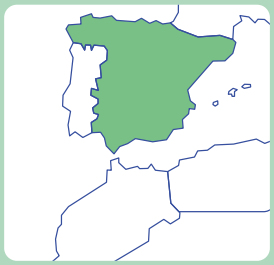
Production

(tonnes and % change 2025 vs. 2024)



- **73,984** Iron castings (-8.5%)
- **3,794** Steel castings (-8.0%)
- **50,048** Light and ultralight castings (-12 %)
- **9,179** Other non-ferrous castings (-1.9%)





CAPITAL
Madrid

POPULATION IN 2025
49.72 million

GDP IN 2025 (CURRENT PRICES)
€ 1,754.68 billion
(+2.8% vs. 2024)

GDP PER CAPITA IN 2025
€ 35,290

UNEMPLOYMENT RATE (2025)
10.5%

CONSUMER PRICE (2025 VS. 2024)
2.7%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Spain

The Spanish foundry industry in 2025

Context

In 2025, the Spanish economy grew by 2.8%, driven by domestic demand and investment, which supported a resilient labor market. The International Monetary Fund forecasts further economic growth of 2.1% in 2026 and 1.8% in 2027.

Foundry Industry Performance

In 2025, the production of Spanish foundries stood at 1,061,561 tonnes, marking an 8.3% decrease compared to 2024. Overall, the sector saw a 3.0% reduction in turnover, while exports – primarily destined for the European Union – remained almost stable (-1.1%), representing a vital 74.27% share of total production. Analysing the subsectors, non-ferrous metals proved to be the true driver of the industry, recording growth across all indicators: production (+2.0%), turnover (+4.4%), and exports (+11.2%). Conversely, both cast iron (production -9.8%, turnover -6.3%) and steel (production -7.9%, turnover -5.4%) experienced negative performances. Regarding end-user markets, the naval, oil and gas, and public works sectors performed well. The automotive industry showed mixed results, with resilient performance for iron castings but sharp declines for non-ferrous metals. Key sectors such as wind energy, machine tools, railway, and agriculture contracted, while the defence sector remains a potential growth area. Despite this complex scenario, the capacity utilization rate rose from 71% to 79%, and order books increased from 80 to 83 days.

Key Challenges

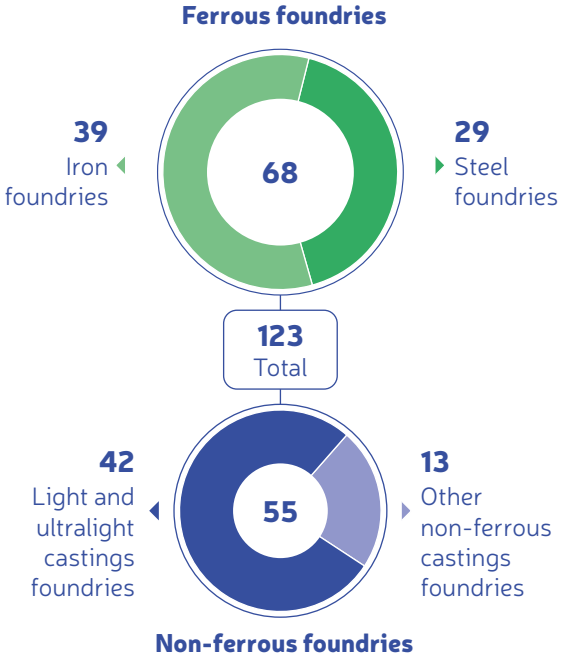
The primary challenge in 2025 was the marked weakness in demand across several key customer markets, which resulted in lower production levels. A second major critical issue is workforce management: companies face increasing difficulties in recruiting and retaining qualified personnel, and struggle to replace retiring workers. This is compounded by growing rates of absenteeism and long-term sick leave. Finally, Spanish foundries face competitiveness challenges linked to an increasingly strict environmental regulatory framework, including the substantial investments required to implement new BREF limit values. These issues are exacerbated by uncertainties arising from international geopolitical tensions and high volatility in energy and raw material markets.

Employment and Outlook

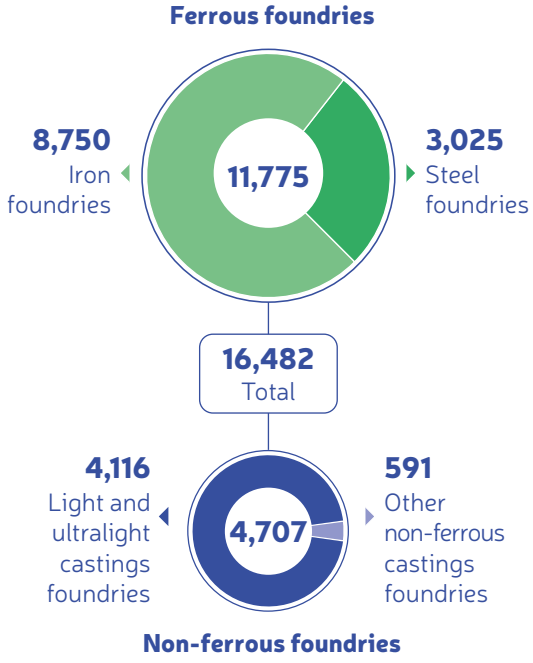
Despite the decline in production, the sector demonstrated resilience in its workforce, managing to increase overall employment by 1.8%. This result was primarily driven by hiring in the non-ferrous metals (+3.8%) and cast iron (+2.5%) subsectors. Expectations for 2026 point to substantial stability compared to 2025 levels, with a moderate recovery anticipated during the year, even though order books remain generally weak. The outlook remains heavily influenced by global geopolitical tensions, particularly the situation in Iran and the Strait of Hormuz. The sector's main concerns involve rising transport and freight costs, higher energy prices (especially natural gas), and price increases for crucial raw materials tied to oil markets, such as aluminium alloys and foundry resins. These factors continue to create a challenging business environment for the industry.

Highlights Spain

Number of foundries

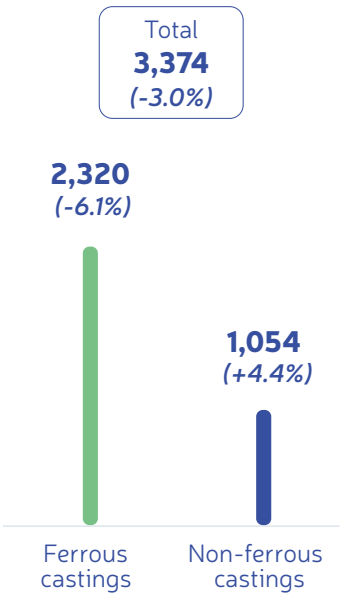


Number of employees



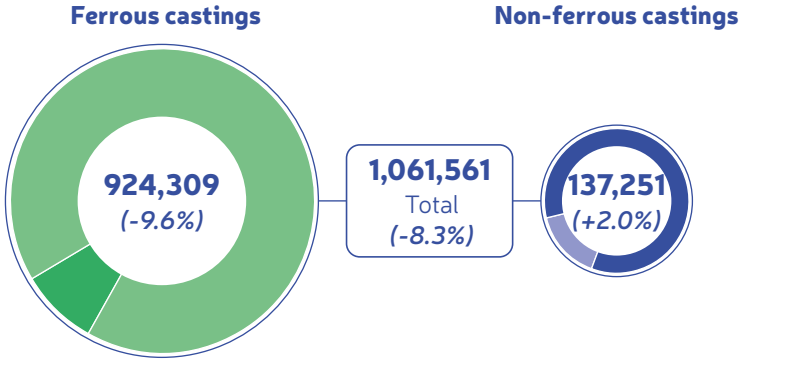
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)



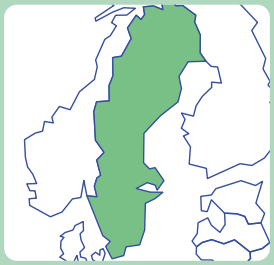
846,029 Iron castings ↘ *(-9.8%)*

78,280 Steel castings ↘ *(-7.9%)*

116,770 Light and ultralight castings ↗ *(+2.8%)*

20,481 Other non-ferrous castings ↘ *(-2.3%)*





CAPITAL
Stockholm

POPULATION IN 2025
10.68 million

GDP IN 2025 (CURRENT PRICES)
€ 616.59 billion
(+1.5% vs. 2024)

GDP PER CAPITA IN 2025
€ 57,753

UNEMPLOYMENT RATE (2025)
8.9%

CONSUMER PRICE (2025 VS. 2024)
2.6%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Sweden

The Swedish foundry industry in 2025

Context

In 2025, Swedish foundries operated in an environment marked by uncertainty, weak demand in some customer segments and pressure from energy, raw material and regulatory costs. The industry remained closely linked to Sweden's manufacturing base, including vehicles, engineering, energy, mining, infrastructure and defence.

Foundry Industry Performance

Total Swedish casting production in 2025 is estimated at approximately 290,000 tonnes, broadly unchanged from 2024. Ferrous production amounted to around 218,000 tonnes. Iron castings accounted for about 204,000 tonnes, down from 210,000 tonnes in 2024, while steel castings decreased to around 14,000 tonnes, from 18,300 tonnes. Non-ferrous production amounted to around 71,000 tonnes. Aluminium was reported at approximately 56,000 tonnes, compared with 45,000 tonnes in 2024, while other non-ferrous metals remained stable at around 15,000 tonnes. The increase in aluminium should, however, be interpreted with caution, as it is likely to be partly explained by a previous calculation or reporting error rather than by an actual increase in production of the same magnitude.
Iron continued to dominate production by volume, representing about 70 per cent of total output. Reliable national data on production value and average capacity utilisation is not yet available, but the overall picture is one of stable volumes combined with pressure on margins and investment capacity.

Key Challenges

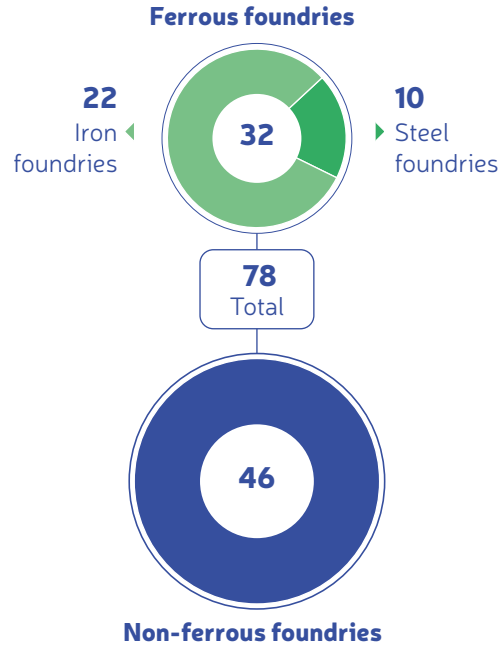
The main challenges in 2025 were energy costs, raw material supply and increasing administrative requirements. Energy remained a direct competitiveness issue, especially for energy-intensive processes. High and volatile electricity costs made planning, pricing and investment decisions more difficult.
Material supply was another key concern. Foundries depend on metal raw materials, scrap qualities, alloying elements, foundry sand, binders and other production inputs. Competition for high-quality scrap and secondary aluminium is expected to increase as more industries seek to reduce their carbon footprint, creating both cost pressure and supply risks.
Customer requirements for climate data, traceability and documentation also increased. For many small and medium-sized foundries, these requirements are resource-intensive and not always matched by customers' willingness to pay. Reliable data and documentation are therefore becoming increasingly important competitive factors.

Employment and Outlook

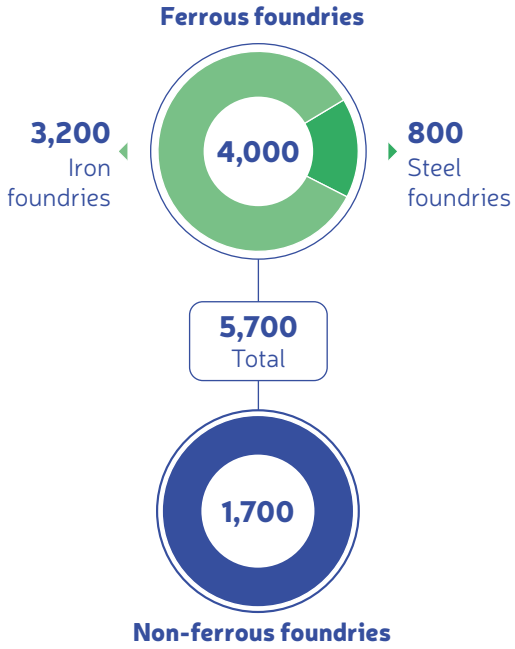
The Swedish foundry industry directly employs approximately 5,700 people, of which around 4,300 work in independent foundries and about 1,400 in in-house foundries. Employment appears broadly stable, but the industry faces a long-term skills challenge.
The outlook for 2026 is cautiously stable. Recovery will depend on stronger demand from key customer industries, more predictable energy costs and improved investment conditions. In the medium term, the industry will be shaped by electrification, defence-related demand, low-carbon materials, digitalisation and circular material flows. Future competitiveness will depend on investment, skills development, data management and secure material supply.

Highlights Sweden

Number of foundries

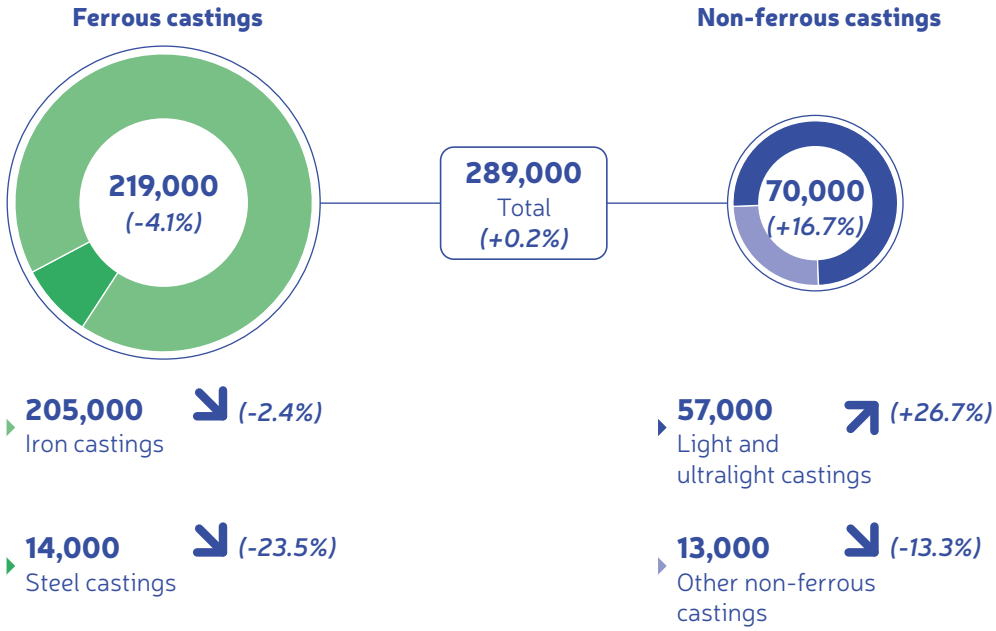


Number of employees



Production

(tonnes and % change 2025 vs. 2024)







CAPITAL
Bern

POPULATION IN 2025
9.03 million

GDP IN 2025 (CURRENT PRICES)
€ 691.79 billion
(+1.3% vs. 2024)

GDP PER CAPITA IN 2025
€ 106,562

UNEMPLOYMENT RATE (2025)
2.8%

CONSUMER PRICE (2025 VS. 2024)
0.2%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Switzerland

The Swiss foundry industry in 2025

Context

In 2025, the 46 member companies of the Swiss Foundry Association (GVS) faced a highly demanding year under mixed economic conditions. Weakened European economic performance and restrictive U.S. tariff policies hampered customer investments, leading to a 7.6% overall decline in Swiss foundry production.

Foundry Industry Performance

The first half of 2025 saw stable but low order levels with weak capacity utilization. Specialized Swiss OEM suppliers were heavily impacted by the severe crisis in German automotive manufacturing, while machine construction also recorded low to moderate demand. The second half of the year brought further deterioration as customer demand worsened across nearly all key European export markets, and unpredictable U.S. customs policies induced market paralysis and demand volatility.
However, the railway, large motor vehicle, and construction sectors provided stable exceptions, even showing slight growth in new orders. Furthermore, the economic downturn in Germany led to insolvencies and plant closures, displacing market shares and allowing Swiss foundries to secure new customers.
In terms of materials, total production volumes decreased to 32,051 tonnes (down from 34,685 tonnes in 2024). Light metal and non-ferrous casting fell by 16% to 8,852 tonnes, and ferrous casting declined by 5.7% to 20,072 tonnes. Conversely, copper and zinc alloy castings bucked the trend, growing by 9.3% to 3,127 tonnes.

Key Challenges

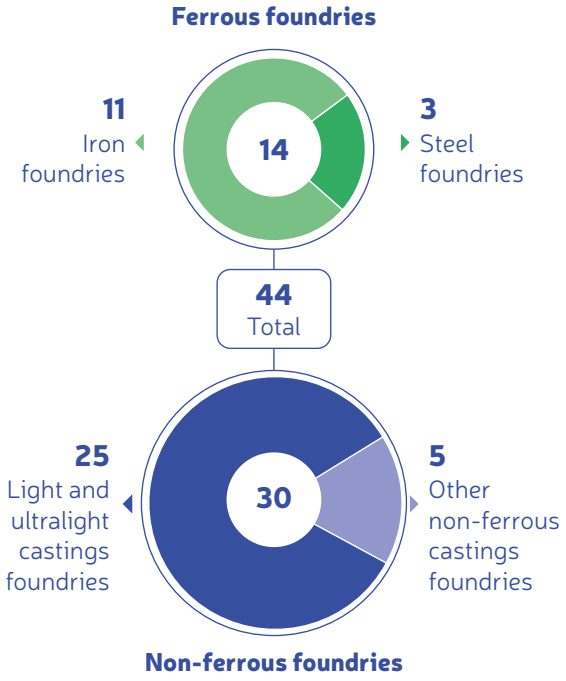
The Swiss foundry sector continues to struggle against international competition due to the strong Swiss franc, persistent shortages of specialized personnel, and high energy costs – where rising network fees and duties offset improvements in base energy prices.
Protectionist trends present a growing administrative and operational barrier. The industry is increasingly restricted by "buy European" clauses, new customs regulations, legal export limitations, and foreign subsidies. Of particular concern are Italy's protectionist tax incentives; if such policies spread across the EU, they threaten Swiss earning prospects in major export markets like Germany. Consequently, the industry strongly supports federal diplomatic dialogues with Rome, Brussels, and Washington to safeguard fair trade.

Employment and Outlook

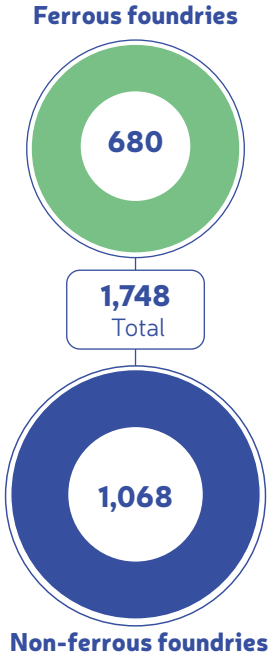
No major economic turning point is expected for 2026, pointing instead to a gradual stabilization process at a modest level. While new model series from German automotive manufacturers offer a slight positive impulse, overall market penetration remains difficult. To counter severe cost pressures, Swiss foundries are heavily accelerating investments in digitalization, automation, and structural modernization. While parts of mass production may be relocated to more cost-effective locations abroad, Switzerland remains firmly anchored as the core hub for high-value creation, technological innovation, and complex development projects. This strategy leverages the industry's global reputation for technological leadership, reliability, and precision.

Highlights Switzerland

Number of foundries

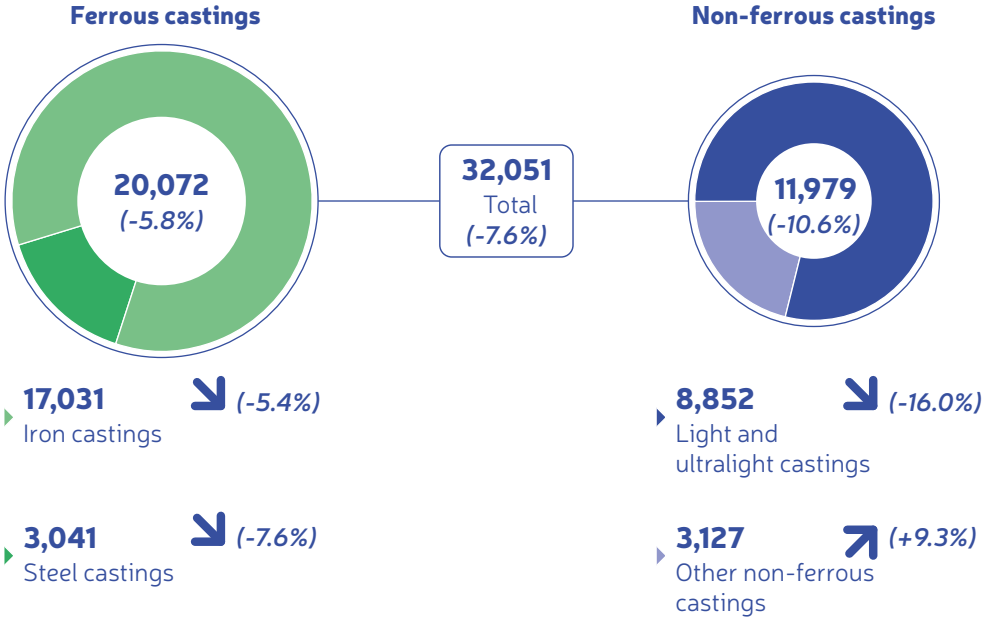


Number of employees



Production

(tonnes and % change 2025 vs. 2024)







CAPITAL
Ankara

POPULATION IN 2025
85.83 million

GDP IN 2025 (CURRENT PRICES)
€ 1,472.17 billion
(+3.6% vs. 2024

GDP PER CAPITA IN 2025
€ 17,153

UNEMPLOYMENT RATE (2025)
8.3%

CONSUMER PRICE (2025 VS. 2024)
34.9%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

Türkiye

The Turkish foundry industry in 2025

Context

Türkiye's 2025 growth bypassed industry, leaving casting demand weak at home and subdued abroad.

Foundry Industry Performance

Turkish metal casting production fell by 11.7% in 2025 to 2.3 million tonnes, a third consecutive year of contraction following declines of 1.9% in 2023 and 14.6% in 2024. The fall was driven primarily by iron castings, down 15.0% and still accounting for around 62% of total output. Steel castings, a smaller segment at about 7%, also fell. Non-ferrous castings proved far more resilient, easing only 3.6%; aluminium, the largest non-ferrous segment at roughly 28% of output, benefited from the automotive lightweighting trend. Sector turnover declined by 6.3% to EUR 7.98 billion; the milder fall in value than in volume reflects higher unit prices amid persistent cost inflation. Exports remained the sector's main buffer: total direct exports reached 1.64 million tonnes (EUR 6.09 billion), equivalent to about 71% of output by volume and 76% by value. Export ratios were high across ductile iron (75%), steel (76%) and non-ferrous castings (79%), underlining the industry's dependence on external demand while domestic demand stayed weak.

Key Challenges

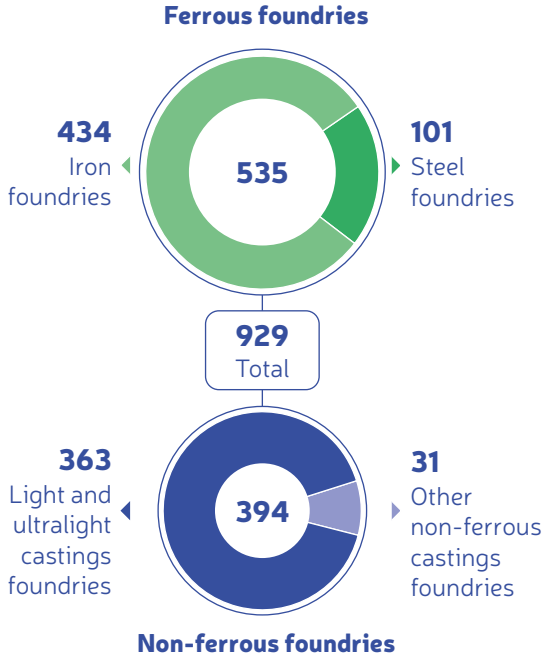
The industry's main challenges in 2025 were weak demand, cost inflation and import pressure. Domestic demand from key customer industries such as automotive, machinery and white goods was subdued, with only the steel sector providing relatively resilient demand. Persistent cost inflation compounded the strain: prices for metal casting services rose 25.6% and the Turkish lira weakened 25.8% against the euro, squeezing margins that could only partially be passed on given soft demand. On the export side, which absorbs most of national output, stagnant European automotive and machinery production limited growth opportunities, even as Turkey gained share in the EU market. Rising imports across several domestic customer sectors reflect the same global competition that Turkish foundries also face in their export markets, adding pressure on both fronts: eroding domestic sales while intensifying price competition abroad, where higher Turkish lira-denominated input and labour costs further weigh on competitiveness.

Employment and Outlook

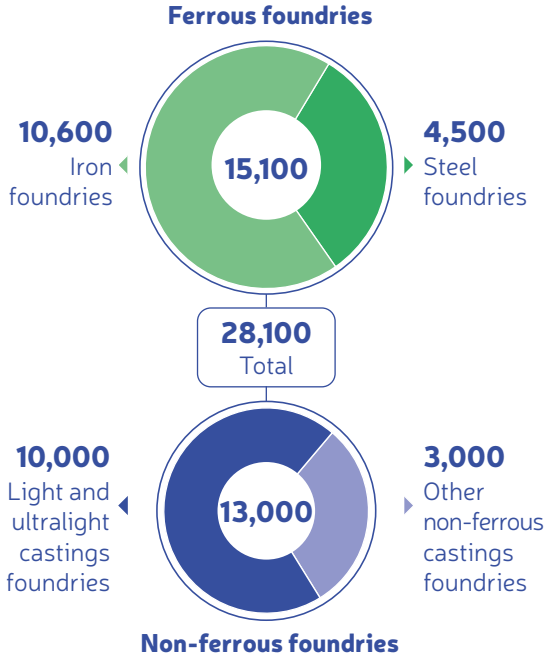
Employment in industry contracted in 2025, with the workforce and hours worked both declining and capacity utilisation staying below its long-term average throughout the year. The outlook for 2026 is cautiously optimistic: a partial recovery in the final quarter of 2025 and a modest improvement in business confidence suggest demand may be bottoming out, though a durable recovery in production and employment depends on a sustained revival of demand. Over the medium term, automotive lightweighting, the shift toward aluminium, defence and infrastructure programmes in Europe, and investments in digitalisation and sustainability are expected to shape the industry's structural transformation and competitiveness.

Highlights Türkiye

Number of foundries

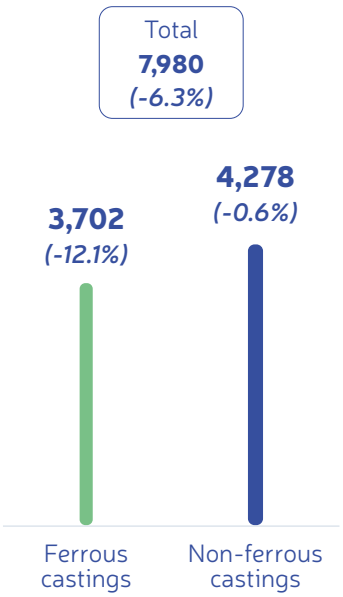


Number of employees



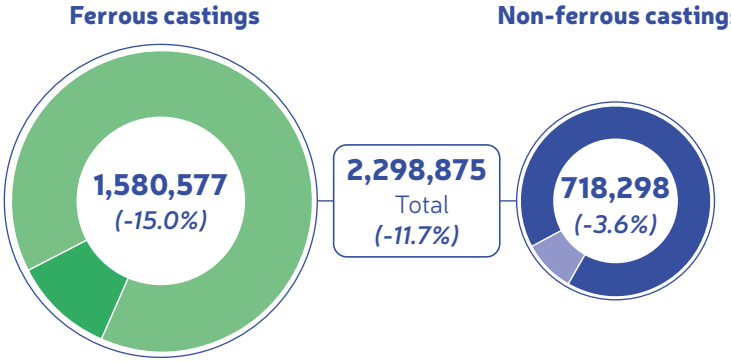
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)



1,411,927 Iron castings ↘ *(-14.9%)*

653,745 Light and ultralight castings ↘ *(-3.7%)*

168,650 Steel castings ↘ *(-16.2%)*

64,553 Other non-ferrous castings ↘ *(-2.5%)*





CAPITAL
London

POPULATION IN 2025
69.49 million

GDP IN 2025 (CURRENT PRICES)
€ 3,689.42 billion
(+1.3% vs. 2024)

GDP PER CAPITA IN 2025
€ 53,059

UNEMPLOYMENT RATE (2025)
4.9%

CONSUMER PRICE (2025 VS. 2024)
3,4%

Source: International Monetary Fund, World Economic Outlook Database, April 2026

UK

The UK foundry industry in 2025

Context and Foundry Industry Performance

2025 saw a 1.7% decrease in UK iron casting production compared to 2024, dropping to 387,827 tonnes. Steel casting production decreased by 17.4% to 43,099 tonnes. Production values showed a mixed picture: iron foundries saw increased sales values due to customer mix, while steel foundries faced flat prices and reduced orders. The UK saw both one of the largest iron foundries and one of the largest steel foundries close, with both being part of group businesses being owned overseas and the work being removed from the UK. This was in part due to the nature of the end customers' locations globally and wanting to be nearer to their end markets. For non-ferrous foundries, aluminium casting production grew by 15% to 72,753 tonnes, while copper-based, zinc, and magnesium alloys remained flat. Capacity utilisation varied widely between individual foundries with some operating at 100% and having to seek to increase their capacity to produce, through to others who had seen a decline in the amount of capacity they were using. Overall, the average capacity utilisation fell by five percentage points on average.

Key Challenges

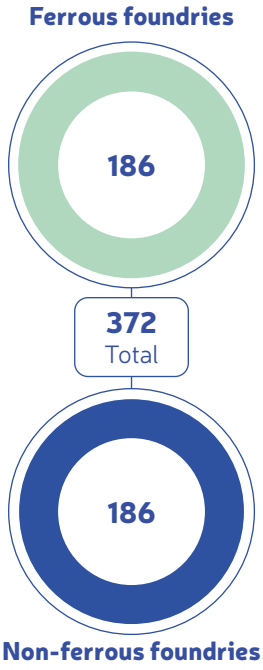
The industry faced several key challenges, including cyber-attacks on major businesses. A significant attack on Jaguar Land Rover halted production for weeks, heavily impacting its supply chain and numerous UK foundries supplying the automotive sector. Energy costs remained a major burden. Although the government held consultations on business support, most plans were delayed until 2026. Foundries consistently fell short of government thresholds for energy-intensive industry support, and rising non-commodity costs on energy bills remain a primary concern. Additionally, labour costs continued to rise in the UK in part driven by policies of the UK government and with other changes to employment law in the UK, foundries have experienced a more problematic environment with finding people that wish to work in the environment of being in a foundry compared to other industries and sectors.

Employment and Outlook

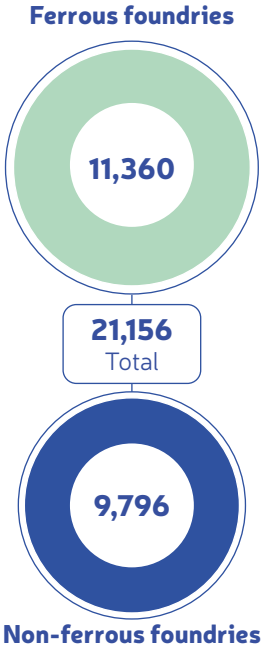
The general picture for the number of employees in the industry is stable. While a number of employees have been lost with the closure of a couple of the largest foundries in the UK, others have seen some expansion and additional recruitment. Overall, there was approximately a 7% decrease in the headcount of employees in 2025 compared to 2024, with the biggest change being seen in the ferrous sector.
Looking forwards, the industry is expecting to see an increase in costs and legislation concerning the Employment Rights Act from the current government, which many believe will make it more expensive and harder to recruit employees. There is also a concern changes proposed will make it harder to remove underperforming employees from foundries, and with the push to increase unionisation of businesses by the government, what impact this will have on employment is unknown.

Highlights UK

Number of foundries

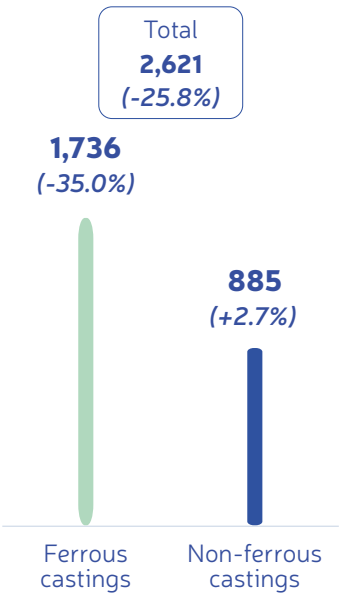


Number of employees



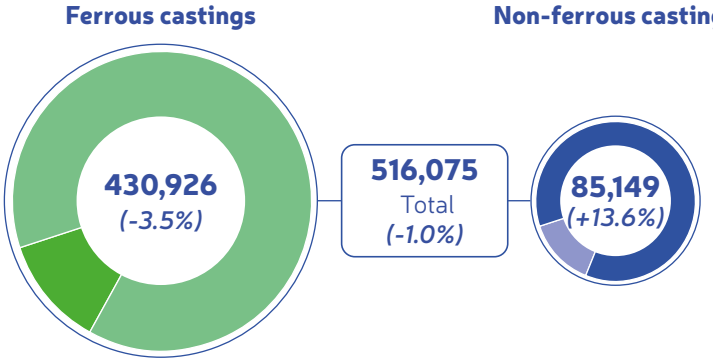
Production value

(million euros and % change 2025 vs. 2024)



Production

(tonnes and % change 2025 vs. 2024)



387,827 (-1.7%)
Iron castings

74,353 (+14.6%)
Light and ultralight castings

43,099 (-17.4%)
Steel castings

10,796 (+7.3%)
Other non-ferrous castings

European
Foundry
Federation

04

Tables

Ferrous and non-ferrous castings

Table 1
Total production in 1000 t - Ferrous and non-ferrous castings

COUNTRY	Total production		Ferrous castings		Non-ferrous castings	
	2025	2025/24 in %	2025	2025/24 in %	2025	2025/24 in %
Austria	268.8	-0.5	131.5	0.7	137.3	-1.6
Belgium*	58.5	N/A	58.5	N/A		
Czech Rep.	245.0	1.7	150.5	0.3	94.5	3.8
Denmark**	77.9	3.0	74.4	3.0	3.5	2.9
Finland	43.7	12.7	40.0	13.5	3.7	4.8
France	1,275.0	-10.2	969.0	-10.8	306.0	-8.4
Germany	3,256.8	-3.4	2,494.2	-2.9	762.6	-4.8
Hungary***	187.1	N/A	63.3	N/A	123.8	N/A
Italy	1,607.5	-1.6	847.9	-0.9	759.7	-2.4
Norway						
Poland	784.6	3.4	629.5	4.2	155.0	0.3
Portugal	170.5	0.7	119.8	-0.5	50.7	4.0
Slovenia	137.0	-9.4	77.8	-8.4	59.2	-10.6
Spain	1,061.6	-8.3	924.3	-9.6	137.3	2.0
Sweden	289.0	0.2	219.0	-4.1	70.0	16.7
Switzerland	32.1	-7.6	20.1	-5.8	12.0	-10.6
Türkiye	2,298.9	-11.7	1,580.6	-15.0	718.3	-3.6
United Kingdom	516.1	-1.0	430.9	-3.5	85.1	13.6
TOTAL EFF	**12,310.0**	**-5.5**	**8,831.3**	**-6.2**	**3,478.6**	**-2.7**

* *% change is omitted due to missing 2025 data (2024 figure was used as placeholder when available). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

** *Total production does not include steel castings (data not available)*

*** *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 2
Production value in M € - Ferrous and non-ferrous castings

COUNTRY	Total production value		Ferrous castings		Non-ferrous castings	
	2025	2025/24 in %	2025	2025/24 in %	2025	2025/24 in %
Austria	1,383.0	-2.8	494.0	0.9	889.0	-4.7
Belgium*	276.7	N/A	276.7	-0.3		
Czech Rep.						
Denmark						
Finland	215.3	1.3	159.0	-2.5	56.3	13.6
France	5,500.0	-4.1	3,421.0	3.2	2,079.0	-14.0
Germany	11,307.8	-7.5	6,352.2	-6.1	4,955.6	-9.2
Hungary**	590.0	N/A	144.0	N/A	446.0	N/A
Italy	6,385.7	-0.1	2,193.4	-1.0	4,192.3	0.5
Norway	0.0					
Poland	0.0					
Portugal	641.0	5.1	273.0	6.5	368.0	4.1
Slovenia	906.0	-4.4	155.0	-3.1	751.0	-4.7
Spain	3,373.7	-3.0	2,320.0	-6.1	1,053.7	4.4
Sweden						
Switzerland						
Türkiye	7,979.7	-6.3	3,702.0	-12.1	4,277.7	-0.6
United Kingdom	2,621.4	-25.8	1,736.0	-35.0	885.4	2.7
TOTAL EFF	**41,180.3**	**-5.7**	**21,226.3**	**-8.3**	**19,953.9**	**-4.1**

* *% change is omitted due to missing 2025 data (2024 figure was used as placeholder when available). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

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Table 3
Number of foundries (Production units) - Ferrous and non-ferrous castings

COUNTRY	Total	Ferrous foundries			Non-ferrous foundries		
		Total	Iron	Steel	Total	Light and ultralight	Other non-ferrous
Austria	34	15			19		
Belgium	46	26	14	12	20	7	13
Czech Rep.	126	61	41	20	65		
Denmark							
Finland	25	15	11	4	10	7	3
France	330	101	65	36	229	128	101
Germany	500	199	167	32	301	251	50
Hungary	81	20	14	6	61	45	16
Italy	839	148	117	31	691	437	254
Norway							
Poland	455	215	180	35	240	240	0
Portugal	87	30	22	8	57		
Slovenia	47	11	8	3	36	20	16
Spain	123	68	39	29	55	42	13
Sweden	78	32	22	10	46		
Switzerland	44	14	11	3	30	25	5
Türkiye	929	535	434	101	394	363	31
United Kingdom	372	186			186		
TOTAL EFF	**4,116**	**1,676**	**1,145**	**330**	**2,440**	**1,565**	**502**

Table 4
Employment in the foundry industry - Ferrous and non-ferrous castings

COUNTRY	Total	Ferrous foundries			Non-ferrous foundries		
		Total	Iron	Steel	Total	Light and ultralight	Other non-ferrous
Austria	5,385	2,068			3,317		
Belgium	2,140	1,852	1,077	775	288	99	189
Czech Rep.	12,100	8,000			4,100		
Denmark	1,332						
Finland	1,311	971	662	309	340	198	142
France	28,501						
Germany	60,199	31,921	27,262	4,659	28,278	20,819	7,459
Hungary	6,226	1,780	1,473	307	4,446	4,320	126
Italy	24,316	9,054	6,732	2,322	15,262	10,812	4,450
Norway							
Poland	20,000						
Portugal	5,608	2,378	1,908	470	3,230	2,066	1,164
Slovenia	4,655	1,101	941	160	3,554	3,211	343
Spain	16,482	11,775	8,750	3,025	4,707	4,116	591
Sweden	5,700	4,000	3,200	800	1,700		
Switzerland	1,748	680	680		1,068		
Türkiye	28,100	15,100	10,600	4,500	13,000	10,000	3,000
United Kingdom	21,156	11,360			9,796		
TOTAL EFF*	**244,959**	**102,040**	**63,285**	**17,327**	**93,086**	**55,641**	**17,464**

**The total employment figure exceeds the sum of the individual segments because some countries reported only total employment, without a breakdown by ferrous and non-ferrous foundries.*

Ferrous castings

Table 5
Total production in 1000 t - Ferrous castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	134.7	152.3	149.5	138.2	130.6	131.5	0.7
Belgium*	52.4	78.1	83.0		58.5	58.5	N/A
Czech Rep.	192.5	225.5	222.5	180.0	150.0	150.5	0.3
Denmark**	76.3	78.7	84.3	88.8	72.3	74.4	3.0
Finland	47.1	51.8	52.8	46.5	35.3	40.0	13.5
France	1,067.4	1212.4	1244.4	1,170.1	1,086.5	969.0	-10.8
Germany	2,714.8	3,158.4	3,116.4	3,077.5	2,568.7	2,494.2	-2.9
Hungary***	76.4	75.2	74.9	74.9	63.3	63.3	N/A
Italy	893.1	1,058.8	1,051.0	1,032.0	856.0	847.9	-0.9
Norway		29.4					
Poland	524.0	571.2	485.5	492.5	604.1	629.5	4.2
Portugal	106.3	120.7	114.3	121.0	120.5	119.8	-0.5
Slovenia	116.7	124.5	112.1	104.2	84.9	77.8	-8.4
Spain	931.1	1,000.8	1,022.0	1,045.3	1,022.5	924.3	-9.6
Sweden	197.2	210.4	242.0	242.0	228.4	219.0	-4.1
Switzerland	22.8	23.9	25.6	24.4	21.3	20.1	-5.8
Türkiye	1,664.0	2,308.0	2,369.9	2,314.9	1,859.5	1,580.6	-15.0
United Kingdom	365.6	359.4	402.0	411.3	446.5	430.9	-3.5
Total EFF	**9,182.4**	**10,839.4**	**10,852.3**	**10,563.5**	**9,408.8**	**8,831.3**	**-6.2**

* *% change is omitted due to missing 2025 data (2024 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

** *Iron castings only*

*** *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 6
Production value in M € - Ferrous castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	382.4	436.3	511.8	523.4	489.4	494.0	0.9
Belgium		248.6	321.4		277.6	276.7	-0.3
Czech Rep.							
Denmark							
Finland	142.8	154.3	198.8	181.9	163.0	159.0	-2.5
France	2,388.4	2,758.1	3,434.7	3,529.5	3,315.6	3,421.0	3.2
Germany	5,448.0	6,432.9	7,619.0	7,800.0	6,767.2	6,352.2	-6.1
Hungary*	232.0	247.0	225.0	225.0	144.0	144.0	N/A
Italy	1,702.3	2,235.4	2,828.1	2,676.3	2,216.0	2,193.4	-1.0
Norway							
Poland	816.0						
Portugal	210.5	169.2	267.1	295.0	256.3	273.0	6.5
Slovenia	136.6	243.3	215.9	197.8	160.0	155.0	-3.1
Spain	1,731.0	1,936.0	2,470.0	2,596.0	2,470.0	2,320.0	-6.1
Sweden							
Switzerland							
Türkiye	2,774.4	3,347.6	4,670.7	5,055.4	4,210.0	3,702.0	-12.1
United Kingdom	2,340.0	2,200.0	2,240.0	2,700.0	2,670.0	1,736.0	-35.0
Total EFF	**18,304.5**	**20,408.7**	**25,002.5**	**25,780.3**	**23,139.1**	**21,226.3**	**-8.3**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 7
Number of foundries (Production units) - Ferrous castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	15	15	15	15	15	15	0.0
Belgium	30	28	27	27	26	26	0.0
Czech Rep.	70	69	69	67	64	61	-4.7
Denmark	8						
Finland	16	15	15	15	15	15	0.0
France					101	101	0.0
Germany	225	220	220	211	208	199	-4.3
Hungary*	39			32	20	20	N/A
Italy	171	159	158	157	157	148	-5.7
Norway							
Poland	216	216	216	211	215	215	0.0
Portugal	31	31	30	30	30	30	0.0
Slovenia	11	10	10	11	11	11	0.0
Spain	74	74	74	69	72	68	-5.6
Sweden	36	36	36	36	36	32	-11.1
Switzerland	15	13	14	14	14	14	0.0
Türkiye	556	564	570	575	560	535	-4.5
United Kingdom	202	197	194	191	189	186	-1.6
Total EFF	**1,715**	**1,647**	**1,648**	**1,661**	**1,733**	**1,676**	**-3.3**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 8
Employment in the foundry industry - Ferrous castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	2,158	2,165	2,218	2,192	2,155	2,068	-4.0
Belgium	2,039	2,026	1,985	1,925	1,898	1,852	-2.4
Czech Rep.	9,500	9,400	9,000	9,000	8,500	8,000	-5.9
Denmark							
Finland	1,170	995	1,084	921	1,038	971	-6.5
France							
Germany	35,385	34,657	34,985	34,650	33,701	31,921	-5.3
Hungary*	3,620	3,506	3,340	3,340	1,780	1,780	N/A
Italy	9,310	9,137	9,018	9,078	9,078	9,054	-0.3
Norway							
Poland	11,125	10,600	10,600	10,600			
Portugal	2,181	2,380	2,380	2,354	2,397	2,378	-0.8
Slovenia	1,277	1,321	1,355	1,334	1,180	1,101	
Spain	10,808	10,869	10,881	11,790	11,661	11,775	1.0
Sweden*	7,000				4,000	4,000	N/A
Switzerland	1,012	764	807	836	742	680	-8.4
Türkiye	20,500	20,995	21,525	21,875	19,140	15,100	-21.1
United Kingdom	13,850	13,700	13,510	13,190	12,000	11,360	-5.3
Total EFF	**130,934**	**122,515**	**122,688**	**123,085**	**109,270**	**102,040**	**-7.0**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 9
Direct exports total in 1000 t - Ferrous castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria							
Belgium							
Czech Rep.							
Denmark							
Finland	13.9	16.5	15.9	6.7	6.0	11.4	90.7
France	384.3	432.1	459.8	444.8	431.0	395.1	-8.3
Germany	1,046.2	1,248.7	1,288.3	1,327.0	1,128.0	1,097.9	-2.7
Hungary*	64.9	61.5	57.7	57.7	46.0	45.9	N/A
Italy					178.9	162.2	-9.3
Norway							
Poland	253.0	258.5	219.7	265.6	422.9	503.6	19.1
Portugal**	97.7	110.5	99.3	104.4	107.7	107.7	N/A
Slovenia			86.7	80.6			
Spain	621.8	659.4	655.9	725.4	702.0	682.0	-2.8
Sweden							
Switzerland							
Türkiye	981.2	1,456.6	1,572.7	1,525.1	1,213.0	1,071.6	-11.7
United Kingdom							
Total EFF	**3,462.9**	**4,243.8**	**4,455.9**	**4,537.2**	**4,235.4**	**4,077.4**	**-3.9**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*
*** % change is omitted due to missing 2025 data (2024 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Iron castings

Table 10
Total production in 1000 t - Iron castings (incl. grey, ductile and malleable castings)

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	125.1	141.9	142.7	131.8	125.1	126.6	1.2
Belgium	46.9	75.7	79.0	66.8	55.5	54.7	-1.4
Czech Rep.	151.5	181.0	178.5	143.0	125.0	126.5	1.2
Denmark	76.3	78.7	84.3	88.8	72.3	74.4	3.0
Finland	40.4	46.1	47.5	41.6	31.5	35.7	13.4
France	1,025.5	1,169.3	1,196.6	1,120.7	1,038.4	935.9	-9.9
Germany	2,575.8	3,014.6	2,949.3	2,940.8	2,456.2	2,379.3	-3.1
Hungary*	74.4	73.5	73.2	73.2	63.1	63.1	N/A
Italy	835.1	1,002.1	992.0	971.2	807.8	796.0	-1.5
Norway							
Poland	484.0	527.6	448.4	457.4	591.2	614.7	4.0
Portugal	102.2	116.3	109.0	115.9	116.6	115.8	-0.7
Slovenia	99.1	120.7	107.8	98.3	80.5	74.0	N/A
Spain	865.9	931.6	944.7	960.6	937.4	846.0	-9.7
Sweden	177.0	189.2	220.1	220.1	210.1	205.0	-2.4
Switzerland	20.3	21.5	23.1	21.6	18.0	17.0	-5.4
Türkiye	1,472.0	2,028.8	2,079.8	2,059.4	1,658.7	1,411.9	-14.9
United Kingdom	324.0	324.0	364.9	376.8	394.1	387.8	-1.6
Total EFF	**8,495.4**	**10,042.4**	**10,041.0**	**9,887.9**	**8,781.4**	**8,264.4**	**-6.0**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 11
Number of foundries (Production units) - Iron castings (incl. grey, ductile and malleable iron castings)

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	12	12	12	12			
Belgium	19	17	15	14	14	14	0.0
Czech Rep.	55	54	54	53	44	41	-6.8
Denmark							
Finland	11	11	11	11	11	11	0.0
France					65	65	0.0
Germany*	186	182	182	173	170	167	-1.8
Hungary**	27	27	27	27	14	14	N/A
Italy	136	127	124	123	123	117	-4.9
Norway							
Poland	180	180	180	176	180	180	0.0
Portugal	23	23	22	22	22	22	0.0
Slovenia	8	7	7	8	8	8	0.0
Spain	43	43	42	39	42	39	-7.1
Sweden**					22	22	N/A
Switzerland	13	10	11	11	11	11	0.0
Türkiye	447	452	455	458	449	434	-3.3
United Kingdom							
Total EFF	**1,160**	**1,145**	**1,142**	**1,127**	**1,175**	**1,145**	**-2.6**

* *>50 employees*
** *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 12
Employment in the foundry industry - Iron castings (incl. grey, ductile and malleable castings)

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria							
Belgium	1,208	1,158	1,178	1,180	1,132	1,077	-4.8
Czech Rep.							
Denmark							
Finland	645	629	698	558	680	662	-2.6
France							
Germany	29,496	29,276	29,875	29,401	28,250	27,262	-3.5
Hungary*	3,450	3,340	3,210	3,210	1,473	1,473	N/A
Italy	6,978	6,850	6,777	6,830	6,830	6,732	-1.4
Norway							
Poland	8,010	7,400	7,400	7,400			
Portugal	1,684	1,861	1,861	1,795	1,934	1,908	-1.3
Slovenia	1,066	1,120	1,154	1,154	1,012	941	-7.0
Spain	8,182	8,199	8,144	8,737	8,541	8,750	2.4
Sweden*					3,200	3,200	N/A
Switzerland**	910	527			742	680	N/A
Türkiye	13,875	14,225	14,525	14,725	13,105	10,600	-19.1
United Kingdom							
Total EFF	**75,503**	**74,585**	**74,822**	**74,990**	**66,899**	**63,285**	**-5.8**

* *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*
** *% change is omitted since the number of employees reported for 2025 also includes employees of steel foundries*

Table 13
Total production in 1000 t - Grey iron castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	33.4	37.1	38.6	31.9	31.9	30.4	-4.7
Belgium	43.0	44.5	44.5				
Czech Rep.	117.0	140.0	138.0	110.0	98.0	99.0	1.0
Denmark	28.9						
Finland	17.3	20.6	20.5	16.6	13.7	14.6	6.5
France	431.9	503.9	505.6	470.3	436.3	385.1	-11.7
Germany	1,618.7	1,873.7	1,822.8	1,836.9	1,623.0	1,568.7	-3.3
Hungary*	16.5	16.3	16.6	16.6	8.6	8.6	N/A
Italy	534.4	616.2	616.1	610.9	537.6	526.6	-2.0
Norway							
Poland	360.0	392.4	333.5	339.5	414.3	440.9	6.4
Portugal	26.1	39.7	35.3	37.3	38.0	32.5	-14.6
Slovenia*	59.3	73.2	65.9	59.0	38.6	38.6	N/A
Spain	283.1	322.8	338.5	375.6	334.0	310.7	-7.0
Sweden	126.0	141.7	154.2	154.2	156.6		
Switzerland	8.4	8.6	9.9	8.4	6.9	6.4	-6.9
Türkiye	617.3	920.7	901.3	868.0	701.0	588.9	-16.0
United Kingdom	128.4	128.4	136.1	132.0	130.0	174.3	34.1
Total EFF	**4,449.5**	**5,279.9**	**5,177.2**	**5,067.4**	**4,568.6**	**4,225.3**	**-4.2**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 14
Total production in 1000 t - Ductile iron castings (incl. nodular and malleable iron castings)

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	91.7	104.8	104.1	99.9	93.2	96.2	3.2
Belgium	3.9	4.5					
Czech Rep.	34.5	41.0	40.5	33.0	27.0	27.5	1.9
Denmark							
Finland	23.1	25.5	27.1	25.0	17.8	21.1	18.7
France	593.6	665.5	691.1	650.3	602.1	550.8	-8.5
Germany	957.1	1,140.9	1,126.5	1,103.9	833.2	810.6	-2.7
Hungary*	58.0	57.2	56.6	56.6	54.4	54.4	N/A
Italy	300.6	385.9	376.0	360.3	270.2	269.4	-0.3
Norway							
Poland	124.0	135.2	114.9	117.9	176.8	173.8	-1.7
Portugal	76.1	76.6	73.7	78.6	78.6	83.4	6.1
Slovenia	39.8	47.4	42.0	39.3	37.5	35.3	-5.7
Spain	582.8	608.8	606.2	585.0	603.4	535.3	-11.3
Sweden	51.0	47.5	65.9	65.9	53.5		
Switzerland	11.9	12.9	13.1	13.2	11.1	10.6	-4.5
Türkiye	854.7	1,108.1	1,178.5	1,191.4	957.7	823.0	-14.1
United Kingdom	195.6	195.6	228.7	244.7	264.1	213.5	-19.2
Total EFF	**3,998.4**	**4,657.2**	**4,744.8**	**4,664.9**	**4,080.6**	**3,705.0**	**-8.4**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Steel castings

Table 15
Total production in 1000 t - Steel castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	9.6	10.3	6.8	6.4	5.4	4.9	-10.1
Belgium		2.4	4.0		3.0		
Czech Rep.	41.0	44.5	44.0	37.0	25.0	24.0	-4.0
Denmark							
Finland	6.7	5.7	5.3	4.9	3.8	4.3	14.8
France	41.9	43.1	47.8	49.4	48.1	33.2	-31.1
Germany	138.0	143.8	167.1	136.7	112.9	115.0	1.8
Hungary*	2.0	1.7	1.7	1.7	0.3	0.3	N/A
Italy	58.0	56.8	58.9	60.8	48.2	51.9	7.7
Norway							
Poland	40.0	43.6	37.1	35.1	12.9	14.8	14.6
Portugal	4.1	4.4	5.4	5.1	3.9	4.0	2.5
Slovenia	17.6	3.8	4.3	5.9	4.1	3.8	-8.0
Spain	65.3	69.2	77.3	84.7	85.0	78.3	-7.9
Sweden	20.2	21.2	21.9	21.9	18.3	14.0	-23.5
Switzerland	2.5	2.4	2.5	2.8	3.3	3.0	-7.6
Türkiye	192.0	279.3	290.1	255.6	201.3	168.6	-16.2
United Kingdom	41.6	35.4	37.1	34.5	52.2	43.1	-17.4
Total EFF	**680.5**	**767.5**	**811.3**	**742.4**	**627.6**	**563.1**	**-9.8**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 16
Number of foundries (Production units) - Steel castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria							
Belgium	11	11	12	13	12	12	0.0
Czech Rep.	27	27	27	26	25	20	-20.0
Denmark							
Finland	7	6	6	6	4	4	0.0
France					36	36	0.0
Germany*	39	38	38	38	31	32	3.2
Hungary**	0	6	5	5	6	6	N/A
Italy	35	32	34	34	34	31	-8.8
Norway							
Poland	36	36	36	35	35	35	0.0
Portugal	8	8	8	8	8	8	0.0
Slovenia	3	3	3	3	3	3	0.0
Spain	31	31	32	30	30	29	-3.3
Sweden**	11				10	10	N/A
Switzerland	2	3	3	3	3	3	0.0
Türkiye	109	112	115	117	111	101	-9.0
United Kingdom							
Total EFF	**322**	**316**	**322**	**321**	**348**	**330**	**-5.4**

* *>50 employees*
** *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 17
Number of persons employed total - Steel castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria							
Belgium	831	868	807	745	766	775	1.2
Czech Rep.							
Denmark							
Finland	525	366	386	363	358	309	-13.7
France							
Germany	5,889	5,386	5,110	5,249	5,451	4,659	-14.5
Hungary*	170	166	130	130	307	307	N/A
Italy	2,332	2,287	2,241	2,248	2,248	2,322	3.3
Norway							
Poland	3,115	3,200	3,200	3,200			
Portugal	497	519	519	559	463	470	1.5
Slovenia	211	201	201	180	168	160	-4.8
Spain	2,626	2,670	2,737	3,053	3,120	3,025	-3.0
Sweden*					800	800	N/A
Switzerland	102	237					
Türkiye	6,625	6,770	7,000	7,150	6,035	4,500	-25.4
United Kingdom							
Total EFF	**22,923**	**22,670**	**22,331**	**22,877**	**19,716**	**17,327**	**-12.8**

* *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Non-ferrous metal castings

Table 18
Total production in 1000 t - Non-ferrous metal castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	121.4	139.6	141.9	132.1	139.6	137.3	-1.6
Belgium	1.7	1.6					
Czech Rep.	94.5	108.3	105.5	98.0	91.0	94.5	3.8
Denmark	3.5	3.3	3.6	4.1	3.4	3.5	2.9
Finland	4.1	6.1	6.3	4.5	3.5	3.7	4.8
France	330.7	339.9	340.4	353.7	334.0	306.0	-8.4
Germany	769.4	806.1	810.3	834.2	801.1	762.6	-4.8
Hungary*	121.7	121.6	126.0	126.0	123.8	123.8	N/A
Italy	659.2	880.5	820.6	828.0	777.5	759.7	-2.4
Norway		5.9					
Poland	285.2	310.9	264.2	261.6	154.6	155.0	0.3
Portugal	50.3	50.6	51.5	49.2	48.7	50.7	4.0
Slovenia	53.1	64.3	66.4	64.0	66.2	59.2	-10.6
Spain	124.6	127.7	131.4	136.3	134.6	137.3	2.0
Sweden	56.4	60.0	60.0	60.0	60.0	70.0	16.7
Switzerland	13.6	14.8	15.4	15.6	13.4	12.0	-10.6
Türkiye	506.8	655.5	738.8	735.4	745.1	718.3	-3.6
United Kingdom	120.1	114.5	97.3	90.0	74.9	85.1	13.6
Total EFF	**3,316.3**	**3,811.1**	**3,779.5**	**3,792.7**	**3,571.5**	**3,478.6**	**-2.7**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 19
Production value in M € - Non-ferrous metal castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	811.7	959.7	1,150.3	1,177.5	933.0	889.0	-4.7
Belgium							
Czech Rep.							
Denmark							
Finland	45.2	53.7	62.5	61.9	49.6	56.3	13.6
France	1,882.6	2,095.5	2,459.1	2,530.4	2,417.8	2,079.0	-14.0
Germany	4,429.0	5,190.0	6,209.0	6,157.0	5,457.0	4,955.6	-9.2
Hungary*	390.0	408.0	450.0	450.0	446.0	446.0	N/A
Italy	3,053.4	4,150.0	4,911.7	4,483.9	4,173.0	4,192.3	0.5
Norway							
Poland							
Portugal	324.7	323.4	376.2	356.0	354.0	368.0	4.0
Slovenia	0.0	650.9	803.0	837.8	788.3	751.0	-4.7
Spain	803.0	893.0	1,039.0	998.0	1,009.0	1,053.7	4.4
Sweden							
Switzerland							
Türkiye	2,530.4	2,707.6	3,834.0	4,126.2	4,304.0	4,277.7	-0.6
United Kingdom	950.0	920.0	840.0	892.0	861.7	885.4	2.7
Total EFF	**15,220.0**	**18,351.9**	**22,134.9**	**22,070.6**	**20,793.4**	**19,953.9**	**-4.1**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 20
Number of foundries (Production units) - Non-ferrous metal castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	22	22	22	21	20	19	-5.0
Belgium	27	25	23	19	20	20	0.0
Czech Rep.	65	65	65	65	65	65	0.0
Denmark							
Finland	13	13	12	12	9	10	11.1
France					229	229	0.0
Germany	327	322	323	315	306	301	-1.6
Hungary*	31	32	32	32	61	61	N/A
Italy	820	732	710	704	704	691	-1.8
Norway	3						
Poland	240	240	240	238	240	240	0.0
Portugal	57	57	57	57	57	57	0.0
Slovenia	47	45	43	42	39	36	-7.7
Spain	52	52	53	52	53	55	3.8
Sweden*	60				46	46	N/A
Switzerland	31	30	30	30	30	30	0.0
Türkiye	396	404	409	412	405	394	-2.7
United Kingdom	195	191	189	189	186	186	0.0
Total EFF	**2,386**	**2,230**	**2,208**	**2,188**	**2,470**	**2,440**	**-1.3**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 21
Employment in the foundry industry - Non-ferrous metal castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	4,380	4,357	4,239	3,938	3,778	3,317	-12.2
Belgium	430	360	332	313	299	288	-3.6
Czech Rep.*	4,000	4,000	4,000	4,500	4,100	4,100	N/A
Denmark							
Finland	344	350	361	379	327	340	4.0
France							
Germany	32,473	31,242	33,662	32,722	30,803	28,278	-8.2
Hungary*	5,250	5,333	4,800	4,800	4,446	4,446	N/A
Italy	14,524	14,061	14,274	14,788	14,788	15,262	3.2
Norway							
Poland	7,387	11,200	11,200	11,200			
Portugal	3,293	3,339	3,289	3,108	3,047	3,230	6.0
Slovenia	3,669	3,576	3,547	3,646	3,658	3,554	-2.8
Spain	4,623	4,597	4,753	4,475	4,534	4,707	3.8
Sweden*					1,700	1,700	N/A
Switzerland	1,450	1,166	1,165	1,224	1,059	1,068	0.8
Türkiye	13,850	14,150	14,250	14,320	14,120	13,000	-7.9
United Kingdom	13,000	12,560	12,390	10,530	9,998	9,796	-2.0
Total EFF	**108,673**	**110,291**	**112,262**	**109,943**	**96,657**	**93,086**	**-4.1**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 22
Total production in 1000 t - Light and ultralight castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria	111.3	128.0	131.9	124.0	130.2	128.1	-1.6
Belgium	0.5	-	-	-	-		
Czech Rep.	77.7	89.4	87.6	82.2	78.3	83.0	6.0
Denmark		-	-	-	-		
Finland	1.7	3.6	3.6	1.8	1.7	1.7	3.3
France	293.5	299.0	299.3	314.3	297.3	274.1	-7.8
Germany	673.2	716.6	716.5	740.6	708.7	676.6	-4.5
Hungary*	119.2	119.3	124.0	124.0	123.1	123.1	N/A
Italy	544.0	732.5	685.0	687.2	631.7	616.4	-2.4
Norway							
Poland	272.0	296.5	252.0	250.0	153.9	154.4	0.3
Portugal	32.0	33.1	34.9	33.7	32.8	33.4	1.9
Slovenia	44.6	52.7	55.6	57.9	56.7	50.0	-11.7
Spain	101.3	106.2	110.5	114.6	113.6	116.8	2.8
Sweden	39.2	45.0	48.0	48.0	45.0	57.0	26.7
Switzerland	10.8	11.7	12.4	12.5	10.5	8.9	-16.0
Türkiye	450.3	579.1	665.9	660.8	678.9	653.7	-3.7
United Kingdom	104.5	99.3	87.6	79.5	64.9	74.4	14.6
Total EFF	**2,875.9**	**3,312.0**	**3,314.7**	**3,331.1**	**3,127.4**	**3,051.7**	**-2.5**

** % change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

Table 23
Total production in 1000 t - Copper alloy castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria							
Belgium							
Czech Rep.	16.0	18.0	17.0	15.0	12.0	10.7	-10.8
Denmark							
Finland	2.4	2.5	2.7	2.7	1.8	1.9	6.2
France	16.1	17.7	18.5	17.7	17.4	14.0	-19.4
Germany	46.1	48.4	46.6	66.7	69.9	70.2	0.4
Hungary*	0.7	0.7	0.3	0.3	0.4	0.4	N/A
Italy	39.4	52.8	47.4	48.0	49.4	48.4	-2.1
Norway							
Poland**	4.8	5.2	4.4	4.4	0.7	0.7	-4.7
Portugal	16.2	14.7	14.2	13.5	13.7	14.9	8.5
Slovenia	1.0	1.0	1.1	1.1	0.9	0.9	-4.8
Spain	15.3	12.8	12.6	13.8	13.2	13.0	-1.7
Sweden							
Switzerland	2.0	2.0	1.9	2.1	2.0	2.3	11.7
Türkiye	24.9	33.4	24.3	24.6	23.9	23.3	-2.5
United Kingdom	8.3	7.9	7.9	8.6	8.2	8.9	8.9
Total EFF	**193.2**	**217.2**	**199.0**	**218.6**	**213.7**	**209.6**	**-1.9**

* *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*
** *incl. Copper, Zinc and other non ferrous metal*

Table 24
Total production in 1000 t - Zinc castings

COUNTRY	2020	2021	2022	2023	2024	2025	2025/24 in %
Austria							
Belgium							
Czech Rep.	0.8	0.9	0.9	0.8	0.7	0.7	0.0
Denmark							
Finland							
France	18.9	20.7	20.3	19.5	19.2	17.9	-7.3
Germany	49.8	41.1	28.7	26.9	22.5	15.8	-29.9
Hungary*	1.7	1.5	1.6	1.6	0.2	0.2	N/A
Italy	75.8	95.1	88.2	92.7	97.4	94.9	-2.5
Norway							
Poland	6.0	6.5	5.6	5.1			
Portugal	2.2	2.8	2.4	2.0	2.2	2.3	6.7
Slovenia	7.5	8.2	7.1	5.1	4.9	5.1	3.8
Spain	7.3	8.0	7.5	7.7	7.8	7.5	-3.7
Sweden							
Switzerland	0.8	1.1	1.1	0.9	0.8	0.9	3.3
Türkiye	31.6	43.0	48.5	50.0	42.3	41.2	-2.5
United Kingdom	7.3	7.3	1.8	1.9	1.9	1.9	0.0
Total EFF	**209.6**	**236.2**	**213.7**	**214.1**	**199.9**	**188.4**	**-5.8**

* *% change is omitted due to missing 2024 data (2025 figure was used as placeholder). The % change for the European total was calculated on a comparable basis, taking into account only countries with actual surveyed data for both years. Estimated or missing data - and their individual changes, marked as N/A - are excluded from percentage change calculations.*

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