

ENGEL at the K 2025

ENGEL remains the strongest European supplier in a dynamic injection moulding market

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ENGEL is navigating one of the most challenging phases since its founding 80 years ago. Increasing uncertainty in key sales markets, structural shifts in the customer landscape and rising competitive pressure are reshaping the environment. At the same time, the machine manufacturer is unlocking new potential through a clear commitment to global customer proximity and a consistent innovation mindset. ENGEL remains the strongest European supplier in a dynamic injection moulding market.

With a clear commitment to responsibility, high innovative strength and global customer proximity, ENGEL shows how the globally active injection moulding machine manufacturer is positioning itself with substance and vision in a difficult environment. "Our industry faces major tasks - from digitalisation and skills shortage to the circular economy," says Stefan Engleder, CEO of the ENGEL Group. "We focus on well-thought-out innovations with real customer benefits - and on partnerships at eye level." At K, the world's largest trade fair for plastics solutions, ENGEL will demonstrate concrete solutions to real market requirements. "For us, K is more than a product stage," emphasises Engleder. "It is a place for genuine dialogue, feedback and new perspectives. Our customers should feel that we are listening, investing and thinking ahead together."

Europe & Middle East: restrained investment, selective opportunities

In financial year 2024/25, ENGEL achieved a turnover of 1.5 billion euros. For the current year, turnover is expected to decline by around seven per cent to 1.4 billion euros, reflecting the broader economic slowdown in many regions.

In Europe, invest appetite remains subdued. In German-speaking countries in particular, high labour costs, political uncertainty and cautious subsidy programmes are causing a dampening the market development. By contrast, countries such as Italy are stimulating investment through targeted incentives. Demand focuses on solutions that deliver short-term efficiency gains; medium and long-term projects are launched less frequently. In the Middle East and parts of Africa, conditions are stable. While international corporations are cautious, population growth and industrialisation sustain constant demand. ENGEL has gained market share in medical technology and packaging. Combining all-electric machine platforms, globally available service and local expertise gives ENGEL strategic advantages in the region. The focus is on turnkey solutions – scalable and high-availability, especially for standard applications.

Americas: Uncertainty slows investments, regional differences persist

Investment momentum in North America remains restrained. Political uncertainties and volatile tariffs are prompting many companies to postpone larger projects. Planning is particularly challenging in the automotive sector, where development of new e-mobility platforms is progressing more slowly than expected. Medical technology is normalising after the pandemic-driven peak. In packaging, everyday applications remain stable, while new regulations increasingly influence material choices and product design.

Mexico's market environment remains demanding. Many customers are operating below capacity and are adopting flexible production models such as outsourcing or leasing. At the same time, technical moulding applications are gaining in importance, particularly for export markets in Central and South America. In Brazil, the overall picture is stable, with selective growth impulses. Focus areas include standard applications in automotive, packaging and consumer goods. Digital solutions are moving centre stage in response to structural skills bottlenecks.

Asia: WINTEC growth; selective investments

Overall development in Asia is stable. Unit sales are on plan, but price pressure and demand for cost-optimised solutions lowering average revenue. The WINTEC portfolio gaining importance, driven by short delivery times and economically scalable turnkey solutions. New

logistics applications are gaining in importance. Medical technology and packaging are slightly below plan but trending positive. Uncertainties around tariffs and supply chains are delaying investments in some areas, while Chinese outward investment becoming a growth driver. ENGEL is responding with a flexible production network: systems are built where it is most cost-effective. Growth continues in Southeast Asia, while Oceania increasing competition from China. With almost 40 years of sales experience and over 25 years of local production, ENGEL is deeply rooted in Asia – a reliability that creates trust and makes ENGEL a preferred partner for demanding applications.

Industry overview: differentiated trends, stable partnerships

Medical technology remains a stable growth driver. The demand for highly automated and all-electric solutions stays strong - especially for complex applications such as drug-delivery systems. ENGEL offers proven turnkey systems combining high process reliability and efficiency.

In packaging technology, a challenging market environment is dampening large investments, while the demand for standard applications and solutions with recycled materials remains stable. The forthcoming EU PPWR regulation is adding momentum.

In the automotive sector, the situation remains tense. Investment is selective, often tied to new lightweight design concepts, battery applications or glazing. Many customers are prioritising retrofits and machine relocations over new purchases. Growth opportunities arise where functionally integrated plastic components are used - for example, smart front and rear modules. ENGEL scores with technological expertise, local presence and a broad portfolio - from premium solutions to competitive alternatives such as WINTEC.

In the technical moulding, developments vary. Rising energy and labour costs are hampering investment, but first impulses are coming from the construction sector. The market demands integrated, automated solutions that maximise availability. ENGEL is responding with new two-platen machines and all-electric systems engineered for efficiency and reliability.

After-sales business is developing above-average. An installed base of over 125,000 machines worldwide ensures continuous capacity utilisation for retrofit, refurbishment and relocation projects. ENGEL focuses on digitalisation, availability and fast response times – reliably supporting customers throughout the entire life cycle of their machines.

Listening and generating real customer benefits

Despite the tense market situation, ENGEL is staying true to its claim and strengthening customer proximity. "For us, it's about value before volume," explains CEO Dr Stefan Engleder. "We strengthen our position through genuine customer value, not through above-average volume." The company's global presence, consistent focus on innovation and its two-brand strategy with ENGEL and WINTEC are proving their worth. "Every crisis is an opportunity to position ourselves more clearly – by truly listening to our customers and delivering solutions that provide real benefits," Engleder concludes.

Photo: ENGEL

Stefan Engleder, CEO ENGEL Group

ENGEL AUSTRIA GmbH

ENGEL is one of the global leaders in the manufacture of injection moulding machines. Today, the ENGEL Group offers a full range of technology modules for plastics processing as a single source supplier: injection moulding machines for thermoplastics and elastomers together with automation, with individual components also being competitive and successful in the market. With twelve production plants in Europe, North America, Mexico and Asia (China, Korea and India), and subsidiaries and representatives in more than 85 countries, ENGEL offers its customers the excellent global support they need to compete and succeed with new technologies and leading-edge production systems.

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