



# Machinery sector shows its mettle

The ERJ Tire & Rubber Machinery Survey 2025 reveals robust sales growth among tire and rubber processing equipment manufacturers worldwide

**W**hile not matching their performance of last year, respondents to the ERJ Tire & Rubber Machinery Survey 2025 registered continued strong growth in tire & rubber machinery markets worldwide.

Total sales among respondents replying to the survey both this year and last came in at \$3,735 million: a year-on-year increase of 14.1%, compared to the 18.6% gain recorded in 2024.

The slower growth clearly reflects the increasing challenges linked to global geopolitical and trade tensions, such as the crises in the Middle East, Red Sea and Russia's continuing war on Ukraine.

These negative impacts, of course, were evident even before

the global economic uncertainty created by US trade policies and Washington's imposition of tariffs on imports from countries worldwide – particularly China.

It will be interesting to see how this situation develops, especially as China was the main driver for growth in the global tire & rubber machinery market in 2024.

In this year's survey, sales among the 10 largest Chinese-based manufacturers totalled \$1,789 million, representing a 19.8% increase on the level recorded by the same suppliers in our 2024 survey – the figures based on data provided by the Chinese Rubber Machinery Manufacturers Association (CRMA).

According to Sentury Tire president Lin Wenlong, China's tire manufacturing industry is set for a

period of "strong development," with domestic demand providing a key driver for growth.

Addressing the 20th China Rubber Annual Conference on 25 March, Lin Wenlong noted that the Chinese government had listed "expanding domestic demand" as a top priority for 2025: creating new opportunities for the tire industry to grow locally.

Among the key drivers for growth will be the use of advanced manufacturing technologies, Lin Wenlong noting that Chinese tire manufacturers have initiated an 'efficiency revolution' focused on AI and robotics.

AI and computing, commented the Sentury Tire leader, "will bring about the second stage of smart tire production and reshape the industry."

## Top 20 manufacturers of tire and rubber machinery (by sales)

Supplier	Country	2024 sales USD million	Change vs 2023	2023 sales USD million	Change vs 2022	2022 sales USD million
Mesnac Co. Ltd <sup>1,2</sup>	China	661	+9.1%	606	+29%	470
VMI Group BV	Netherlands	563	+15.6%	487	+16%	421
HF Group <sup>3</sup>	Germany	484	+7.1%	452	+23%	367
Safe-Run Machinery Co. Ltd <sup>1</sup>	China	280	+11.1%	252	-2%	258
Dalian R & P Machinery Co. Ltd <sup>1</sup>	China	240	+34.8%	178	+10%	162
Cimcorp Oy	Finland	173	+58.7%	109	n/s	n/s
Kobe Steel Group <sup>4</sup>	Japan	151	+4.9%	144	0%	144
Guilin Rubber R & D Institute <sup>1</sup>	China	133	+11.8%	119	+2%	117
ARP Technologies (Suzhou) Co. Ltd. <sup>5</sup>	China	109	+104.0%	51	+76%	29
Yiyang R & P Machinery Group Co. Ltd <sup>1</sup>	China	108	+71.4%	63	+9%	58
Tianjin Saixiang Technology Co. Ltd <sup>1</sup>	China	94	+19.0%	79	+15%	69
Qingdao Hilang Holding Co. Ltd <sup>1,6</sup>	China	91	+93.6%	47	+18%	40
Comerio Ercole	Italy	86	+17.8	73	-1%	74
Uzer Makina VE Kalip Sanayi	Turkey	76	-8.4%	83	+46%	57
L&T Rubber Processing Machinery	India	73	-27.0%	100	-23%	130
Guilin Rubber Machinery Ltd <sup>1</sup>	China	54	-6.9%	58	0%	58
REP International	France	52	-1.9%	53	CHK	CHK
Rodolfo Comerio	Italy	49	-3.9%	51	+4%	49
Dalian Second R & P Machinery Co. Ltd <sup>1</sup>	China	49	0.0%	49	+9%	45
Sinochem (Fujian) Rubber & Plastics Machinery Co. Ltd <sup>1,7</sup>	China	48	+23.1%	39	-22%	50

ERJ: For all Euro-to-USD conversions ERJ applied the average 2023 rate of \$1 = €0.9240 (2024); €0.9243 (2023); €0.951 (2022). Note 1: Figure supplied by CRIA in US dollars, based on conversion rate \$1 = RMB7.0939 (31 Dec 2023) Note 2: Mesnac sales figure is for machinery sales only; Group sales CNY7.2bn. Note 3 (HF Group (Harburg-Freudenberger Maschinenbau GmbH) consists of HF Mixing Group, HF TireTech Group, Farrel Pomini. Note 4: Kobe Steel translates figures from Japanese yen (as per its annual report) into US dollars. Fiscal year runs 31 March. Note 5: Formerly China Chemical Guilin Engineering Co., Ltd. Note 6: Formerly Qingdao HLANG Special Equipment Technology Co. Ltd. Note 7: Formerly Sino-Rubber Machinery Co., Ltd.

For Chinese tires to 'break through,' he urged sustained investment in factory construction, an expanded manufacturing footprint, and R&D - particularly in sustainability and innovation.

By contrast, an equivalent set of respondents based in Europe, including Turkey reported an 11.9% year-on-year growth in sales to \$1,529 million.

In a similar analysis within last year's survey, European-based companies registered a 22.0% overall increase.

This reflects the higher exposure of the region to the impact of global geopolitical events, not least on

energy costs and inflation – as well as tire industry consolidation and the often negative effects of EU regulations on industrial competitiveness.

### Top players

The world's largest tire and rubber machinery manufacturer Mesnac reported continued growth in earnings, driven by strong overseas investments from domestic tire manufacturers and steady growth in its rubber machinery business.

In a recent financial forecast, Mesnac said it expected net profit to range between ¥490 million (€59 million) and ¥530 million for the full year 2024, representing a 47-59%

year-on-year increase.

The Qingdao, China-based manufacturer attributed a strong 2024 performance to a significant "surge in overseas investments" by local Chinese tire makers.

Furthermore, the group said it had enhanced its project delivery capacity, which helped increase "both revenue and profitability in the rubber equipment business."

In addition to the rubber & tire machinery business, Mesnac also includes rubber materials and R&D businesses.

Meanwhile, VMI's Dutch-based parent group TKH reported strong growth in sales and earnings for its 'smart manufacturing' division, to which tire-building systems contributed 83% of revenues.

TKH said turnover at 'smart manufacturing' rose "strongly during the year, although growth slowed

## Expand & upgrade

Among the companies ticking the 'Expand,' 'Upgrade/modernise' and/or 'Build' boxes in the ERJ Tire & Rubber Machinery Survey 2025 were: VMI, HF Group, Comerio Ercole, ARP Technologies, Rodolfo Comerio, REP, Uzer Makina, Marangoni Meccanica, Prodicon, Spoollex, Carter Bros and Z-Laser.

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## A busy year

Mesnac retained its position as the world's largest producer of tire & rubber machinery, following a year of significant developments at the Chinese-based manufacturer.

Reflecting these trends, the group announced this January that it had broken ground on a new tire mould and machinery production facility in Trang Bang, Tay Ninh, Vietnam.

Part of Mesnac's strategic programme to build its global brand, the state-of-the-art factory will be a 'crucial' part of group's plans to supply tire moulds worldwide.

The Vietnam base, it stated, will "enhance overseas delivery and service capabilities, expand business scope, strengthen global supply capacity, and enhance the global influence of the brand."

A month earlier, Mesnac unveiled plans to establish a \$20-million manufacturing facility and service base in Mexico to support growing demand in North America and "cope with" international trade barriers.

Located in Leon, Guanajuato, the unit will manufacture equipment for rubber processing

as well as other machinery for processing of mechanical parts and components.

Last June, Mesnac announced plans to expand its production footprint in Vietnam and Cambodia within two years, as the two Asian countries gain traction among tire makers.

Over recent years, Vietnam and Cambodia have become investment hotspots for tire makers, offering a more favourable trade environment, particularly for Chinese manufacturers.

Leading producers Sailun and General Science already have production facilities in Cambodia, with other key players such as Firemax, Doublestar, Wanli and HK Tire also establishing manufacturing bases in the country.

Furthermore, China and Cambodia have disclosed plans to expand their joint rubber & tire projects, having signed a \$1 billion (€910 million) MoU in January.

In Vietnam, China's Sailun and Ghuizhou Tyre as well as other brands such as Bridgestone, Michelin, Yokohama, Kumho, Cheg Shin, Kenda and Goodyear operate tire production facilities.

down in the second half of 2024, in line with expectations, partly explained by [a] strong H2 2023."

The 'smart manufacturing' order book, at €501.5 million, decreased by 15.2% year-on-year organically – compared to a record €631.3 million reported at the end of 2023.

'Added value' increased to 51.5%, from 50.5% previously, due to a combination of product-mix and price increases being passed on to customers, TKH continued.

Earnings (EBITA) excluding one-off income and expenses grew 31.1% organically at €116.1 million, helped by efficiency measures and "high-capacity utilisation at tire building systems."

The tire building systems gains were driven by a "record order book and the catch-up effect of deliveries, following the easing of earlier supply-chain constraints," the parent group added.

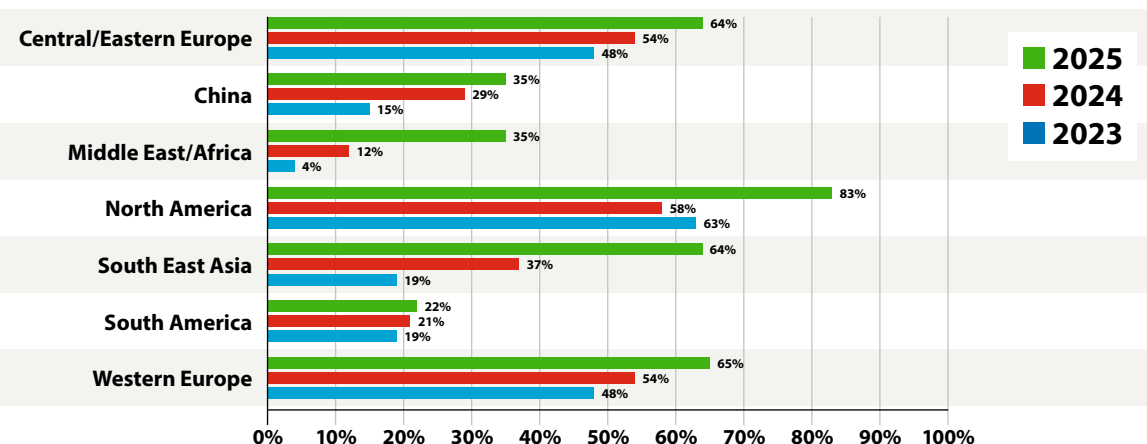
The lower order intake in 2024, both for passenger and truck tire machines was mainly related to a decline in demand from tier 1 customers, continued TKH. On the other hand, it said, "order intake from tier 2 and 3 customers remained at similarly high levels compared to previous years."

TKH concluded that the drivers for advanced tire building systems "remain very strong" due to the growing need for increased automation and production flexibility, as well as sustainability.

### Growth markets

Each year respondents are asked to identify the fastest growing geographic market regions for their businesses, as well as the most buoyant sectors by end-use application.

### Fastest growing region



## Other leading manufacturers of tire and rubber machinery

Supplier	Country	2024 sales USD million	Change vs 2023	2023 sales USD million	Change vs 2022	2022 sales USD million
Barwell Global	UK	n/s	n/a	n/s	n/a	n/s
Beijing New Universal Science and Technology <sup>1</sup>	China	37	0.0%	37	0%	37
Carter Bros	UK	6	n/a	n/s	n/a	n/s
French Oil Mill Machinery <sup>6</sup>	US	45	-18.2%	55	+22%	45
GZH Mech & Elec Equipment <sup>1</sup>	China	33	+43.5%	23	+44%	16
Leonhard Breitenbach	Germany	n/s	n/a	22	0%	22
LWB Steinl	Germany	n/s	n/a	123	+5%	117
Marangoni Meccanica	Italy	16	-40.7%	27	-16%	32
Prodicon International	Italy	16	-5.9%	17	n/a	n/s
Rocky-Ichimar <sup>3</sup>	Japan	18	-10.0%	20	+18%	17
Shanghai Hewei Rubber Mechanical Engineering	China	44	n/a	n/a	n/a	n/a
Shaoxing Jingcheng R & P Machinery <sup>1</sup>	China	19	+5.6%	18	-5%	19
Spoolex	France	14	-6.7%	15	0.0%	15
Troester	Germany	n/s	n/a	281	+89%	149
Wuxi Suanxiang R & P Machinery <sup>1</sup>	China	33	-2.9%	34	-3%	35
Yuyao Huitai Rubber & Plastics Machinery	China	20	n/a	n/a	n/a	n/a

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Among the standout figures in the ERJ Rubber Machinery Survey 2025 is the level of positive sentiment regarding markets in North America. Around 80% of respondents identified this as a high-growth region, up from 58% last year. (See Table p20)

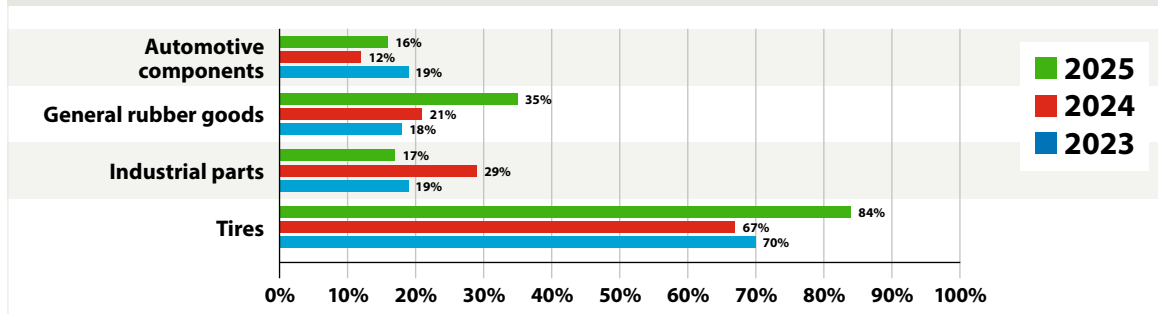
Given the challenges cited above, business sentiment around the western European market remained remarkably resilient, with 65% of respondents listing the region as fast-growing, compared to 54% in the 2024 survey.

The surprisingly positive trend perhaps reflected continued



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## Strongest market sectors



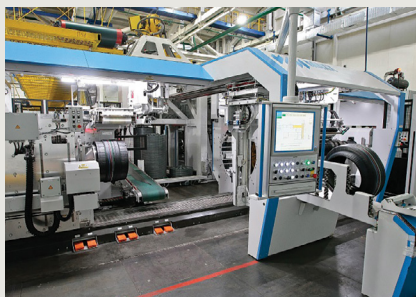
# Safe journey

The “cautious & safety-orientated” tire industry is experiencing the greatest period of disruption in decades, Mike Norman, chief commercial officer, VMI, said in a presentation at the recent Tire Technology Expo 2025.

Major tire makers, he set out, are losing market-share to tier 2 competitors, amid international trade wars, transition to new-mobility platforms and ever tightening product-safety and environmental legislation.

Meanwhile, manufacturers face widening labour & skill gaps at a time of step-changes around the development of tires with enhanced sustainability and in the level complexity of production processes.

When it comes to addressing these issues, Norman said “no-one wants or expects a ‘big bang’ successful adoption of new technologies will be about step-by-step improvements, and a roadmap to the future.”



Regarding skills issues, the VMI executive urged better education & training, along with measures such as more intuitive design of machines interfaces, process and machine optimisation and continuous improvement programmes.

Automation-focused enhancements were also on Norman’s ‘should-do’ list, including, for example greater use of vision systems and data to automate more parts

of the tire production process.

Norman went on to note that VMI is implementing AI and machine-learning technologies, towards providing autonomous systems – capable of making their own decisions without human intervention.

The tire plant of tomorrow, he forecast, will employ “self-learning ‘agents’ at all stages of production with extended use of robotics to enhance efficiency in the factory.”

Such advances in technologies, along with other new concepts “will eventually transform tire production,” said Norman, adding that tomorrow’s tire industry will be “more responsive to market demand [and] far more agile.”

However, he concluded: “Nothing will happen overnight: this is a 10-year time horizon – but we need to understand direction of travel and build a roadmap.”

investment by overseas tire makers keen to increase access to EU markets combined with upgrade projects at tire plants across the wider European region and relocation of production from Russia.

For instance, respondents to the

ERJ survey again reported a significant rise in the number of automation and upgrade projects being carried out at European tire-manufacturing facilities.

Meanwhile, following last year’s recovery in China’s growth-market

rating to 29% – from a prior-year Covid-impacted 15% – the country achieved a positive rating from 35% of survey respondents.

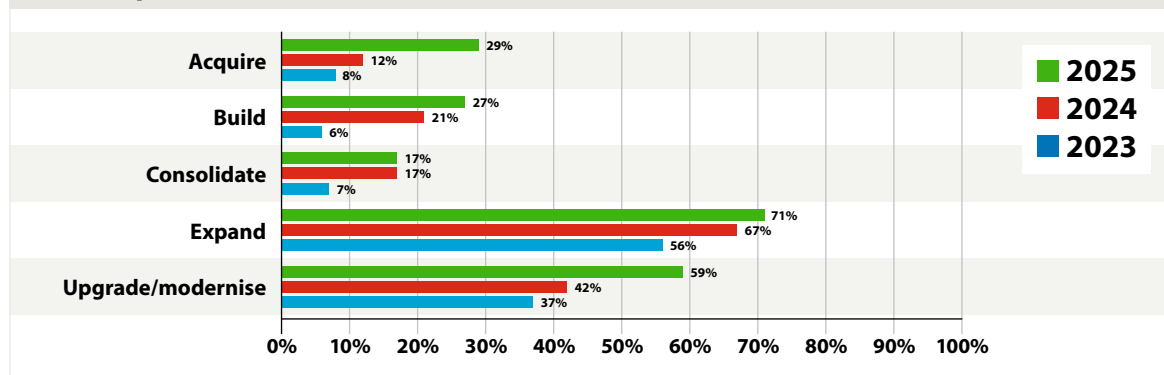
Going forward, it will be interesting to see how the Chinese tire & rubber machinery market develops, especially given the current uneasy stand-off in the country’s trade dispute with the US.

Asked to identify strongest end-product market sectors, ‘tire manufacturing’ again gained by far the highest rating – at 80% the sector substantially surpassed levels recorded in the ERJ Tire & Rubber Machinery Survey over recent years. (See Table)

Another notable takeaway from this year’s survey is the continued low level of optimism around the automotive components sector. While recovering by four percentage points from the low of 12% recorded



## Future plans



## Mixed signals from exports

The Italian plastics and rubber machinery industry association Amaplast reported weakness in exports to Europe, especially within other EU countries in 2024, while sales to the Americas remained stagnant. More positive results were observed in Asia/Oceania, where sales to the two main markets – China and India – were up 15% on prior-year levels.

Supplies to Germany declined by 2% year-on-year, which Amaplast described as “a relatively modest drop considering the severe economic and industrial crisis the country has been facing.”

Nonetheless, Germany remained the top destination for the Italian rubber & plastics processing machinery. In particular, said Amaplast, the

trend was more encouraging given the fact that German manufacturers suffered a 30% year-on-year collapse in domestic sales and order intake in 2024.

Other major European markets that had performed well in recent years, such as Spain and Romania, experienced a slowdown of 6% and 20%, respectively. Poland also registered a decline of 19% year-on-year, while demand from Turkey continued to grow, up 15% year-on-year.

Amaplast noted “mixed signals” in overseas markets, compounded by the recent uncertainties caused by tariffs and other protectionist measures by the Trump Administration.

Compared to 2023, Italian

exports of plastics and rubber machinery to the US, the sector’s second-largest destination, fell by 4%.

However, Amaplast said it would take “several more months” to fully assess the impact any potential new tariff measures.

While Mexico registered a “significant” increase in orders, Amaplast said future investment plans in the country remains closely tied to the US and its policies.

Exports to Brazil, meanwhile grew 86% on 2023 levels, hitting an ‘all-time record’ of €120 million, primarily driven by strong demand for high-tech machinery.

As for machinery types,

Amaplast noted a 7% decline in injection and extrusion machines.

These were counterbalanced by the strong performance of blow moulding machines, increasingly in demand in the US, the UK, France, Turkey, and Poland.



last year, the sector remains weighed down by uncertainty around the pace of transition to electric vehicles – especially in Europe.

More encouraging were the improved ratings from rubber machinery suppliers for the general rubber goods industry, though sentiment regarding the industrial parts market took a backward step.

Specific non-tire market sectors identified as ‘fast-growing’ by respondents included: aerospace, construction, logistics, medical & pharmaceutical and wind energy.

### Future plans

Despite all the current geopolitical tensions, international trade disputes and industry consolidations, tire & rubber machinery makers are doubling down on plans to develop their manufacturing capabilities over the next 12 months.

This is evidenced by the marked increases in the number of respondents ticking the ‘Expand’ and ‘Upgrade/modernise’ boxes in the ERJ Tire & Rubber Machinery Survey 2025. (See Table)

Also, as per last year, increased plans

to ‘acquire,’ ‘build’ and ‘consolidate’ are further indications of efforts among machinery suppliers to adapt their manufacturing set-ups to demand-shifts across regional and global markets.

For instance, Finnish group Cimcorp noted: “Automation investments for brownfield production plants especially in Europe and North America as well as automation investments for greenfield production plants in Europe, Asia, and North America seem to be growing.”

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## Survey feedback

Responses to this year's survey included comments from tire & rubber machinery major VMI Group that its future plans include expanding its global footprint with two new locations.

For its part, Comerio Ercole said it aims to broaden its international footprint by entering new markets and strengthening existing partnerships."

This, said the Italian company, includes "tailoring solutions to meet diverse regional demands and investing in local support services, while also prioritising continuous innovation."

The company is, therefore, "allocating resources to R&D to develop next-generation machinery and digital tools, ensuring they stay ahead of technological advancements and client expectations.

"Through these strategic initiatives, Comerio Ercole is positioning itself to meet the evolving needs of the industry, balancing traditional engineering excellence with modern digital and sustainable solutions."

In the rubber moulding machinery sector, meanwhile, REP International noted "constant evolution" in markets for energy, medical,

transport (bladder, seals, valves, AVS), security, appliances, defence, leisure/sports products.

The French supplier also highlighted an increasing pace of development in other fields, including fluid distribution (pump stators), water management/treatment and large flat gaskets, as well as electrical connectors and insulators.

In response to such trends, REP will debut "two new generations of even more modern, ergonomic and energy-saving machines" at the K2025 expo, and strengthen its 21-year-old partnership with Tung Yu.

## Expansion update

*In this Q&A, Chinese machinery manufacturer ARP Technologies updates ERJ about previously announced plans for overseas expansion and the development of its technology offerings.*

**ERJ: In our 2024 survey, ARP revealed plans to establish an overseas manufacturing facility, possibly in Europe or Mexico. Is there any update?**

ARP: We continue to evaluate and prepare for different options on various continents. The recent volatility in international trade tariffs is closely monitored by ARP and final decisions will be made immediately after the situation is clear and stable. Meanwhile we will continue to utilise the efficiencies and high-quality output of our two state-of-the-art production plants in Binhai and Suzhou, China.

**ERJ: How much progress has ARP made with the introduction of electric curing presses to the market?**

ARP: Our e-curing presses, equipped with ARP's unique electrical induction tire curing technology, are already successfully operating at multiple customer sites, producing thousands of tires daily. Customer feedback has been overwhelmingly positive, especially praising the improved energy efficiency, faster heating speeds, highly precise temperature control, and excellent heating uniformity.

**ERJ: Any further developments planned in this area?**

ARP: We are preparing to launch a second-generation electrical



induction technology, which will deliver even greater performance, higher energy savings, reduced operational costs, and enhanced system flexibility to meet the evolving needs of the global tire industry.

ARP is also releasing a full electric servo press. By eliminating the need for traditional oil heating and hydraulic systems, our electric servo presses reduce the risk of oil leaks, lower environmental pollution, and create a safer, cleaner working environment. Maintenance requirements are also significantly lower due to fewer moving parts and the absence of exposed heating elements.

**ERJ: What are the key features of ARP's electric curing presses, recognised with an award at Tire Tech Expo 2025?**

ARP: Our e-curing technology distinguished itself from others by using more efficient and more advanced electrical induction technology, combined with a very sophisticated and precise control system. This results in very accurate mould-temperature control, minimal heat losses and much higher reliability of the

equipment. Also, our e-curing retrofit sets do not require modifications to existing moulds and containers.

**ERJ: How might US tariffs impact tire machinery manufacturers and global tire markets more generally?**

ARP: We are closely tracking US tariff developments and evaluating their potential impact on raw material costs, equipment pricing, and overall supply-chain resilience. We're engaging proactively with our key suppliers to secure stable pricing, exploring alternative sourcing options to hedge against cost volatility, and maintaining open dialogue with industry associations and regulators.

With our modular press designs and flexible production planning, we can quickly reallocate capacity between regions to balance any shifts in demand. Above all, we believe that supply-chain diversification, operational agility, and close collaboration with our customers will be essential to navigating the evolving trade landscape and ensuring the long-term stability of the tire machinery sector and global tire markets.

# Electric future

## HF sees e-curing technology as a game-changer for sustainability, efficiency, quality in the tire industry

**A**s machine suppliers, HF is focused on enabling the tire industry to become “cleaner, more efficient and better for the future” including by ensuring energy-input and CO<sub>2</sub> emissions per tire are dramatically reduced.

So, stated Warrern Rudman, executive vice president, HF Group, in a presentation about the latest developments in the field of electrical curing presses for tires, at the recent Tire Technology Expo 2025.

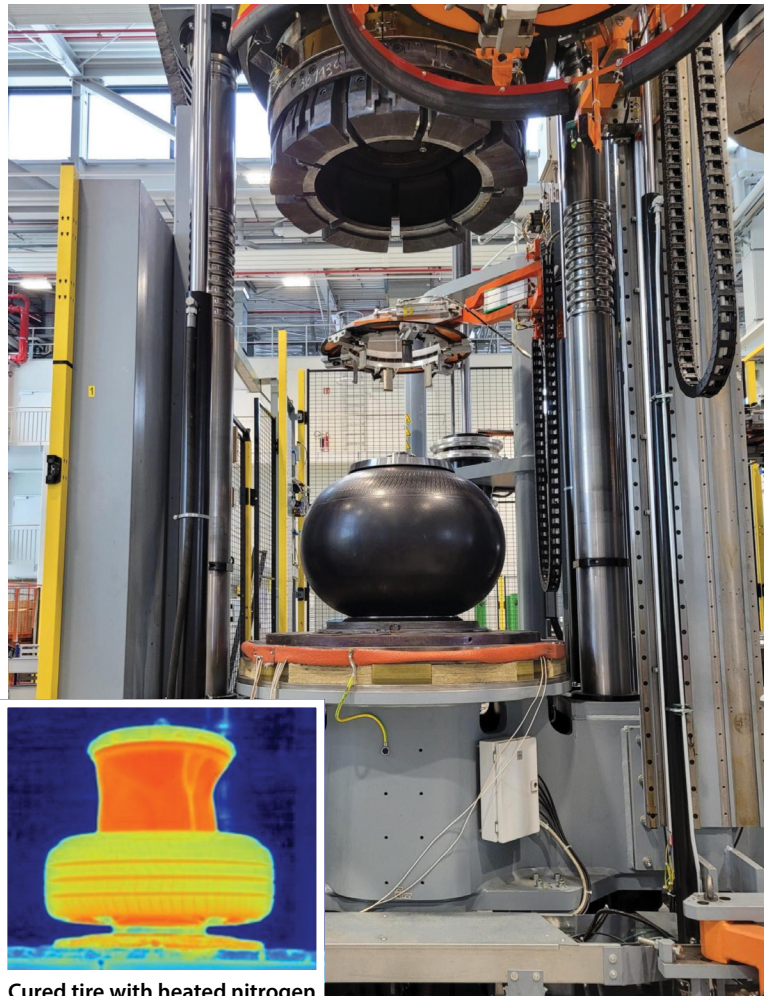
According to the HF executive, the technology can now deliver CO<sub>2</sub> reductions of more than 50% compared to using conventional electrical infrastructure – or up to 100% with a renewable-energy supply.

Potentially, tire makers can achieve huge carbon savings on the curing process, said Rudman, noting that curing is the biggest contributor to factory CO<sub>2</sub>-emissions in the tire industry.

Based on a global market volume of 2.3 billion new tires produced annually by 2031, he said e-curing could potentially save around 21 million tonnes of CO<sub>2</sub> a year.

Key features of HF's e-curing press, he said, include the independent control of both temperature and pressure, which leads to improved tire quality due to more consistent heating of the tire with maximum 'delta T' as small as 1°C possible inside the tire.

“Before when you increased the pressure, you [also] increased the temperature in the tire,” he explained. “Now we can split the temperature and



Cured tire with heated nitrogen

the pressure so we can run at any temperature, at any pressure during the curing cycle.”

Temperature on the platen, he added, can also be “accurately controlled” to within 1°C, helped by the use of AI-based controls to optimise heat distribution within the unit.

“We can change the pressure with inside the bladder, from zero to 28 bar. You can have a step profile, run it at a constant pressure. There are

### Test press in Hamburg fitted with electrical heating solution

unlimited options to do the pressure control internally.”

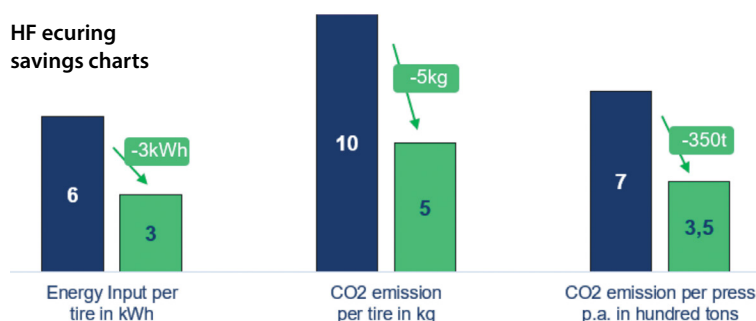
The same, said Rudman, goes for temperature: “You have a temperature range of 20 to 200°C internally in the bladder, which gives you a lot of advantages with shaping.”

Conventionally, he continued, “you couldn't run at such a high temperature because of the pressure of the steam. With electrical curing, you can run at 220°C, at 0.5 bar, which was never possible before.”

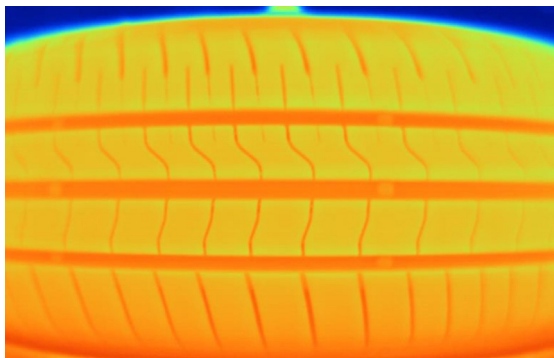
HF uses heated nitrogen for the curing process internally, along with a system that can recover all the nitrogen and return it to the beginning point – a capability said to offer substantial cost benefit.

“With the nitrogen, there is no

### HF e-curing savings charts



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Even heat distribution across the complete tire

condensation, so we have no temperature difference between top and bottom side walls. And we can actually shorten our curing time," said Rudman, who

subsequently cited an example of an approximate two-minute reduction on a 11-minute curing cycle.

"And for sure, maintenance becomes much easier," continued Rudman. "We don't have all the steam traps and we have a much more open system to maintain. This is also a big point for customers."

As HF's e-curing press does not have to have a big centre-mechanism, it can be used for very low-profile tires, including motorcycle and even bicycle tires, added the HF executive.

Further advantages of e-curing include extended bladder life as it avoids the abrasiveness of the steam, while condensate accumulation in the bottom of the sidewall is also eliminated.

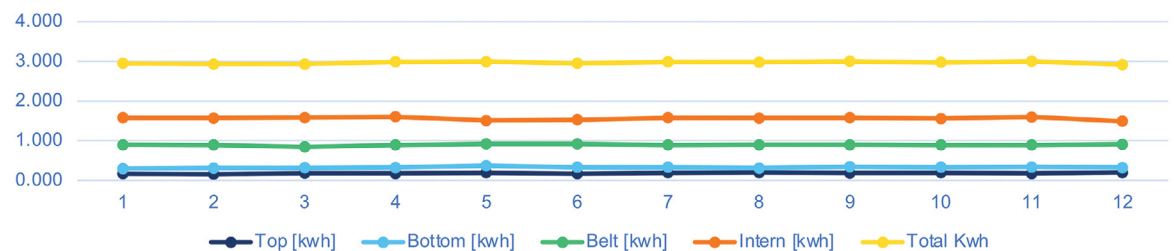
HF will offer e-curing as a feature on new processes and as a retrofit for existing presses.

Electrical heating is available on existing HF curing presses, Rudman saying: "We do not change anything. We only add our electrical solution to it"

"For the container solution, he noted, "we have a heating band on the outside: we do not want any change to the container or other current equipment that customers have.

Specialised thermal insulation on the outside of the container plays a "dramatic part" in the energy-saving and the efficiency of the cure cycle – the presenter also reporting energy savings of up to 60% within the curing cycle with.

kWh Consumption /Tire cured



## VDMA sees "small ray of hope" for exports

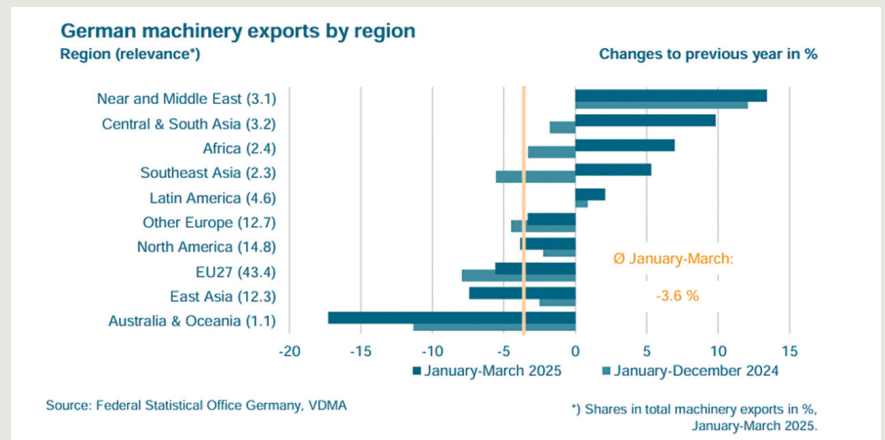
The German machinery and equipment manufacturing sector has started the year with a subdued export result, sector association the VDMA reported. In the first quarter of 2025, exports totaled €48.8 billion, a decrease of 3.6% compared to the same period last year

Nevertheless, March showed a slight upward trend: with an export volume increased 1.3% year-on-year to €17.9 billion, VDMA describing this as "a small ray of hope in foreign trade for the first time since the summer of 2024." Adjusted for prices, however, volumes declined by 0.4%.

"March gives us hope that the downward trend is slowing somewhat - but there is no sign of an all-clear," says Dr Johannes Gernandt, VDMA chief economist said in a 22 May release. "The weakness of the Chinese market and in the EU partner countries remains serious."

Exports to the EU-27 fell by 5.6% in the first quarter, with France registering the sharpest decline of 14.6%, while the rest of Europe also saw a largely negative trend.

Deliveries to North America fell by 3.9%, with the largest single market the US recording a drop of 4.4%, with VDMA also reporting weakness in key Asian markets – exports to China, in particular, recorded a



sharp decline of 12.2%.

On the other hand, exports to several emerging regions developed positively: increasing by 13.4% to the near and Middle East; by 5.3% to south east Asia, while exports to 'Africa, central and south Asia' and Latin America also "grew noticeably".

"We are seeing an increasing relevance of markets that were previously not so much in focus," said Gernandt. "This development is an opportunity, but it needs targeted political support. For example through new trade agreements and more support for

financing and market access."

Gernandt went on to comment on the US announcement of import tariffs of 10% on almost all product groups - including machinery and equipment products - at the start of April. Imports from the EU were even threatened with an increased rate of 20%.

"The USA is our largest single market [and the] new trade barriers come at an inopportune time. Mechanical engineering needs open markets, not political disruptions."

# Rubber machinery companies

Listing of rubber and tire machinery manufacturers and their operations worldwide, based on information supplied for the ERJ Machinery Survey

## ARP TECHNOLOGIES(SUZHOU) CO., LTD

**Base:** Suzhou, Jiangsu, China  
**People:** 350, incl 300 in rubber machinery  
**Sales:** RMB784m  
**Supplies:** Tire curing equipment; Automatic mould-changing equipment; AI- based tire appearance inspection system.  
**Location 1:** Headquarters and manufacturing centre  
**Location 2:** R&D centre & Manufacturing centre  
**Location 3:** R&D Center & Global engineer training base  
**Location 4:** Sales management, engineering, project management, service  
**Location 5:** Sales management, project management, service  
**Location 6:** Sales management, project management, service  
**Location 7:** Sales management, project management, service  
**Location 8:** Sales management, project management, service

## Barwell Global Ltd

**Base:** St Ives, Cambridgeshire, UK  
**People:** 100, including 30 in rubber machinery  
**Supplies:** Extruders; Other moulding machines; Deflashing Equipment (cryogenic and mechanical); Bale Cutters; Microwave ovens.  
**Location:** St Ives, UK

## Calemard Spooler

**Base:** Roche la Moliere, France  
**People:** 54, all in rubber machinery  
**Sales:** €13m  
**Supplies:** Materials handling equipment. Also: In-line and off-line converting cells; Slitter-rewinders; Turret winders; Spooling lines; Doctor recovery lines.  
**Location:** Roche la Moliere, France / Rubber machinery manufacturing

## Carter Bros (Rochdale) Ltd

**Base:** Middleton, Manchester, UK  
**People:** 49, all in rubber machinery  
**Sales:** €5.8m  
**Supplies:** Internal mixing machines; Other mixing machines; Other mill room equipment; Calenders, Extruders. Also: Mixing room control systems.

**Location:** Middleton, Manchester, UK

## Cimcorp Group

**Base:** Ulvila, Satakunta, Finland  
**People:** 550 group  
**Sales:** €160m (group)  
**Supplies:** Materials handling equipment. System integrator for the tire industry. Turnkey solution new and legacy plants, combining company's own, dedicated automation and software for fully automated, customised end-to-end handling.

**Location 1:** Ulvila, Finland / Automation solutions and systems  
**Location 2:** Grimsby, Kanada / Automation solutions and systems  
**Location 3:** Norcross, GA, USA / Sales and service  
**Location 4:** Chennai, India / Sales and service  
**Location 5:** Madrid, Spain / Sales and service

## Comerio Ercole

**Base:** Busto Arsizio, Varese, Italy  
**People:** 200, incl 180 in rubber machinery  
**Sales:** €79.0m  
**Supplies:** Internal mixing machines; Other mixing machines; Other mill room equipment; Calenders; Materials handling equipment; Extruders; New compact devulcanising plant; Rework lines for non-vulcanised scrap; Extrusion technology for thermoplastic composites; Tire retreading lines; Laboratory presses; Solid tire manufacturing lines; Rubber track presses; Conveyor belt presses.

**Location 1:** Busto Arsizio (Italy)  
**Location 2:** Solbiate Olona (Italy)  
**Location 3:** Castellanza (Italy)  
**Location 4:** Maslianico (Italy)  
**Location 5:** Biate (Italy)

## \*Engel Austria GmbH

**Base:** Schwertberg, Austria  
**People:** 7,000 (group)  
**Sales:** €1,600 million (group)  
**Supplies:** Injection moulding machines  
**Location 1:** Schwertberg, Austria: injection moulding machines  
**Location 2:** Pyungtaek-City, Korea: Injection moulding machines

*\*(All details from 2024 survey)*

## French Oil Mill Machinery Co.

**Base:** Piqua, Ohio, USA  
**People:** 65 in rubber machinery  
**Sales:** \$40-50m  
**Supplies:** Internal mixing machines; Extruders; Injection moulding machines; Other moulding machines; De-watering and drying mechanical screw presses.  
**Location 1:** Piqua, Ohio - manufacturing and innovation centre  
**Location 2:** Shanghai, China – manufacturing.

## Gislotica Ida

**Base:** Matosinhos, Porto, Portugal  
**People:** 62, all in rubber machinery  
**Sales:** \$8.1m  
**Supplies:** Materials handling equipment. Also: Dot markers; Beads lubr [systems]; Green tire spray machines; AGV; Robotic creel room; Barcode applicators, RFID applicators, Other equipment.  
**Location:** Porto, Portugal

## Harburg-Freudenberger Maschinenbau GmbH (HF Group)

Consists of HF Mixing Group, HF TireTech Group, Farrel Pomini.  
**Bases:** Germany, Italy, UK, US  
**People:** 2,300 including 1,900 in rubber machinery  
**Sales:** €447m  
**Supplies:** Internal mixing machines; Other mixing machines; Other mill room equipment; Calenders; Materials handling equipment; Extruders; Tire building machinery; Tire curing equipment. Also: Mixing room systems solutions; Mixing room automation; Electrical tire curing; Process monitoring.  
**Location 1:** Hamburg, Germany  
**Location 2:** Freudenberger, Germany  
**Location 3:** Topeka, USA  
**Location 4:** Ansonia, USA  
**Location 5:** Rochdale, UK  
**Location 6:** Pomini, Italy  
**Location 7:** Najus, Slovakia  
 Others (locations only) Belisce, Croatia and St. Paul, USA

*(Locations details from 2023 survey-report)*

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**\*Klöckner Desma  
Elastomertechnik GmbH**

**Base:** Fridingen, Baden-Wuerttemberg, Germany  
**Supplies:** Injection moulding machines  
**Location 1:** Fridingen, Germany  
**Location 2:** Ahmedabad, India  
**Location 3:** Wuxi, China  
**Location 4:** Hebron, USA  
**Location 5:** Považská Bystrica, Slovakia

*\*(Data from 2023 survey)*

**Kobe Steel Ltd**

**Base:** Shinagawa-ku, Tokyo  
**People:** 577 in rubber machinery  
**Sales:** \$151m.  
**Supplies:** Internal mixing machines; Other mixing machines; Other mill room equipment; Extruders.  
**Location 1:** Takasago, Japan / Mixers, twin screw roller head extruders  
**Location 2:** Hudson, Ohio, USA / Mixers, twin screw roller head extruders  
**Location 3:** Kanchipuram, Tamil Nadu, India / Mixers, twin screw roller head extruders.

**\*KraussMaffei Extrusion GmbH**

**Base:** Hanover, Germany  
**People:** 800, including 50 in rubber machinery  
**Sales:** €280m (Rubber machinery estimate 10% approx.)  
**Supplies:** Extruders  
**Location 1:** Laatzen Germany  
**Location 2:** Jiaxing, China

*\*(Data from 2023 survey)*

**L&T Rubber Processing Machinery**

**Base:** Kanchipuram, Tamilnadu, India  
**People:** 300 in rubber machinery  
**Sales:** \$73m  
**Supplies:** Tire building machinery, Tire curing equipment, Open mixing mills, Bladder curing presses, Green tire lube spraying machines, Batch-off units, Tube equipment, Automation solutions from green tires to cured tires handling  
**Location 1:** Kanchipuram, India - Manufacturing  
**Location 2:** Detroit, USA - Sales office  
**Location 3:** Munich, Germany - Sales office

**LWB Steintl GmbH & Co. KG**

**Base:** Altdorf, Bavaria, Germany  
**People:** 403, incl 201 in rubber machinery  
**Sales:** €114m  
**Supplies:** Injection moulding machines; Other moulding machines; Batch-off lines, Automation solutions, Metal carrier for door sealing systems, Dosing machines; Equipment for sealants and adhesives.  
**Location 1:** Altdorf, Germany

**Location 2:** Langfang, China

*(Location details from 2023 survey-report)*

**Marangoni Meccanica SpA**

**Base:** Rovereto, Trento, Italy  
**People:** 70, all in rubber machinery  
**Sales:** €15m  
**Supplies:** Tire building machinery; Tire building machinery; Automation solutions for the tire industry; Radial run-out machines; Tire inspection machinery.  
**Location 1:** Rovereto, TN, Italy  
**Location 2:** Rovereto, TN, Italy  
**Location 3:** Rovereto, TN, Italy

**Mesnac Co. Ltd**

**Base:** Qingdao, Shandong, China  
**People:** Around 4,000, incl about 2,000 in rubber/tire machinery  
**Sales:** Group: CNY7,178m / Rubber machinery: CNY4,753m  
**\*Supplies:** Other mixing machines; Other mill room equipment; Materials handling equipment; Extruders; Curing tunnels/baths; Other moulding machines; Tire building machinery, Tire curing equipment. Also operates in the field of automation logistics, environmental protection, Internet of Things, new rubber material new energy and other fields.  
**Location 1:** Qingdao, Shandong, China: Rubber Machinery  
**Location 1:** Beijing, China: Rubber Machinery  
**Location 1:** West Midland, UK (WYKO Tire Technology): Rubber Machinery  
**Location 1:** Akron, OH, US / MESNAC (America)/ Rubber Machinery  
*(Location: Details from previous survey report)*

**Prodicon International Srl**

**Base:** Milan, Italy  
**People:** 70, all in rubber/tire machinery  
**Sales:** €14.5m  
**Supplies:** Other mill room equipment; Cooling, cutting and stacking equipment for the mixing lines.  
**Location:** Milan, Italy

**REP International**

**Base:** Corbas, Rhône, France  
**People:** 200, all in rubber machinery  
**Sales:** €49.1m  
**Supplies:** Injection moulding machines; Other moulding machines; Tire building machinery; Regeneration machine (HSR) for recycling rubber waste.  
**Location 1:** REP international / Corbas, France / Injection moulding machines and devulcanisation machines  
**Location 2:** REP Deutschland / Wald-Michelbach, Germany / Injection moulding machines

**Location 3:** REP Italiana / Druento, Italy / Injection moulding machines  
**Location 4:** REP Machines Manufacturing / Bangalore, India / Injection moulding machines  
**Location 5:** REP Corporation / Kodak, Tennessee, USA / Injection moulding machines  
**Location 6:** REP Injetoras de Borracha / São Paulo, Brazil / Injection moulding machines  
**Location 7:** RPM / Lombardy, Italy / Horizontal Injection moulding machines.

**Rocky-Ichimarú Co. Ltd**

**Base:** Chikugo, Fukuoka, Japan  
**People:** 91, 70 in rubber machinery  
**Sales:** \$18m (Fiscal year runs to 31 March)  
**Supplies:** Various equipment for tire curing presses (valves, center mechanisms, loaders, unloaders, PCI, squeeze cylinders, hydraulic cylinders, bag cylinders, segmental mould cylinders, platen, etc.), tire building drums (band, belt, shaping), and other tire manufacturing equipment.

**Rodolfo Comerio**

**Base:** Solbiate, Olona, Varese, Italy  
**People:** 100, all in rubber/tire machinery  
**Sales:** \$49m  
**Supplies:** Other mill room equipment; Calenders; Extruders. Also: Laminating line for conveyor belts carcass building; Extrusion lines; Laboratory mills; Laboratory calenders  
**Location 1:** Solbiate Olona, Italy / Calendering lines, mills and laminating lines  
**Location 2:** Solbiate Olona, Italy - Calendering technology centre  
**Location 3:** Busto Arsizio, Italy - Used machines  
**Location 4:** Imola, Italy - Software house  
**Location 5:** Gerenzano, Italy - Hardware  
**Location 6:** Mumbai, India - Service  
**Location 7:** Shanghai, China - Service  
**Location 8:** Qingdao, China - Service  
**Location 9:** n/s, USA - North America service  
**Location 10:** n/s, Mexico - South America service

**\*Safe-Run Intelligent Equipment Co. Ltd**

**Base:** Kunshan, Jiangsu Province, China  
**People:** 600, all in rubber/tire machinery  
**Sales:** \$258m  
**Supplies:** Tire building machinery, tire curing equipment, materials handling equipment  
**Location:** Kunshan, China / Rubber/tire machinery

*\*(Data from 2023 survey)*

**\*Troester GmbH & Co. KG**

**Base:** Hannover, Niedersachsen, Germany  
**People:** 610 (group)  
**Sales:** €142m  
**Supplies:** Extruders, calenders, materials handling equipment, special machines for belts & gaskets, compounding and filtering, hoses, extruded profiles, industrial roofing  
**Location 1:** Troester GmbH & Co. KG, Hannover, Germany  
**Location 2:** Troester Machinery (Shanghai) Co., Ltd., Shanghai, China  
**Location 3:** Troester Machinery Ltd, Ohio, USA  
**Location 4:** Stahl- und Metallbau Rethen GmbH, Laatzen, Germany  
*(Data from 2023 survey)*

**\*Tung Yu Hydraulic Machinery Co. Ltd**

**Base:** Nantou, Taiwan  
**Status:** Private  
**People:** 167, all in rubber machinery  
**Sales:** \$50m  
**Supplies:** Injection moulding machines, other moulding machines, tire building machines, tire curing equipment, conveyor belt vulcanisation machines, steel

cord conveyor belt vulcanisation machines. Also, compression moulding machines, composite and applied materials forming machines

**Location 1:** Nantou, Taiwan: Injection and compression moulding machines  
**Location 2:** Ningbo, China : Compression moulding machines  
*\*(Data from 2023 survey)*

**Uzer Makina VE Kalip Sanayi**

**Base:** Kocaeli, Turkey  
**People:** 563, incl 441 in rubber machinery  
**Sales:** €60m (Subsidiary €10m)  
**Supplies:** Tire curing equipment  
**Location 1:** Kocaeli, Turkey / Tire curing moulds factory  
**Location 2:** Kocaeli, Turkey / Tire curing press factory  
**Location 3:** Kocaeli, Turkey / Tire curing pre-production factory  
**Location 4:** Istanbul, Turkey / Hydraulic cylinders and manifolds factory

**VMI Group BV**

**Base:** Epe, The Netherlands  
**People:** 2,000 in rubber/tire machinery  
**Sales:** €520m

**Supplies:** Other mixing machines; Other mill room equipment; Extruders; Tire building machines; Retreading equipment; Bead apex assembly lines; Steel belt making.

**Location 1:** Epe, The Netherlands  
**Location 2:** Yantai, Shandong Province, PR China (VMI Yantai Ltd.)  
**Location 3:** Yantai, Shandong Province, PR China (VMI Ltd.)  
**Location 4:** Stow, Ohio, USA  
**Location 5:** Cham, Germany  
**Location 6:** Itatiaia, Brazil  
**Location 7:** Leszno, Poland  
**Other locations:** Bangkok, Thailand; Vadodra, India.

**Z-LASER GmbH**

**Base:** Freiburg, BW, Germany  
**People:** 120 (group)  
**Sales:** Not published  
**Supplies:** Positioning lasers and precision mounting brackets for tire building machines or tire presses; Lasers and LEDs as illumination source for machine vision; Camera applications to measure profiles, read dot codes etc.  
**Location 1:** Freiburg, Germany / Plant and HQ



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**1978**  
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**2000**  
**GCU (Gas Circulating Unit)**  
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**2010**  
**REC**  
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**2012**  
**SU (Shaping Unit)**  
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**2014**  
**2019**  
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