



European Association for Machine Tools, Tooling and Technologies

CQ NEWS

AUGUST 2013

MESSAGE FROM THE PRESIDENT



Welcome to this edition of the CELIMO Newsletter. We have had a busy first half of 2013; it began with the visit of our second group to India which, although it was only a small group seems to have been successful in building relationships between Indian manufacturers and

European distributors. You can find out more about the trip later in this newsletter.

We have also been working on updating our guidance document for agency contracts (where the sales relationship remains between the customer and the machine manufacturer). This has been prepared by an experienced lawyer and discussed extensively by the Board. We are just putting the final touches to this and will make it available via the member associations.

We hope that this document will prove useful and we are planning to prepare a similar document covering distribution contracts where the sales relationship is between the customer and the agent.

The mission to India and the agency contract document were on the agenda of our Council meeting which this year, was held in London. We were pleased to see all 12 of the CELIMO member associations represented in some way this year.

I was also delighted that the Council meeting elected Mr Martin Wirth as Vice-President of CELIMO; the intention is that he will take over from me as President next year and I am confident that this will be a positive step for us.

I am also pleased to say that SVMF, our Swedish association have nominated Mr Weine Werlevik as a member of the CELIMO Board.

This now means that all 12 associations are represented on the Board.

The other major item on our agenda was the proposal to create a new category of membership for CELIMO to be called Associate Members. This will be open to individual companies in those countries where there is either no association for distributors/importers or where the association has chosen not to be a member of CELIMO - we will not allow companies to join as Associate Members if they are from one of our 12 member countries.

The idea behind this initiative is to extend our networks into new countries. We also hope that, if a few companies from one country were to join, we might be able to encourage them to form their own association and become full members of CELIMO. The initial launch of this will take place during EMO, just ahead of our usual International Meeting.

This is always a popular event, bringing together importers and distributors from around the world with manufacturers; although this is introduced with an overview of the economic situation around the world, the main focus of the event is the opportunity to chat with colleagues in the industry over lunch.

Another new initiative that we are running during EMO is a lounge for members of the CELIMO associations and any Associate Members who might join us during this event.

We will let you have details of how you can access this lounge nearer the time, but we hope this will be a facility that is of value; it will provide somewhere to sit for a while and to get a coffee or water while you plan your next steps round this massive exhibition.

This is an experiment to see if this facility is of interest, so we hope you will support it; if it is successful, we will repeat it at future EMO's and possibly one or two of the major national exhibitions in Europe.

Secretariat Office

President: Bob Hunt

Secretary: Geoff Noon

The Manufacturing Technologies Association, 62 Bayswater Road, London, W2 3PS

Tel No: 020 7298 6400 Fax No: 020 7298 6430 email: celimo@mta.org.uk web: www.celimo.com

I hope we will meet at EMO, but if we don't, I trust that it will be a good exhibition for you and hope that business in your markets will improve as we move into 2014.

DATES FOR 2013

Please make a note of the dates for CELIMO meetings and events for next year and plan to attend if it is appropriate to you. You can get more details on these events from your association.

Wednesday 18th September - CELIMO International Meeting, to be held during EMO in Hannover

Friday 18th October - Board Meeting in Brussels

Thursday 24th to Saturday 26th October - Tooling Group Meeting in Reutte in Tyrol, Austria

NEWS FROM CELIMO MEMBERS

Italy: ASCOMUT has announced that Mr Andrea Bianchi was elected as the new Chairman of the Association at their annual meeting in March. He is the managing director or Heidenhain Italiana, a post he has held since 2002 and has been on the association's Board of Directors since 2007.

Turkey: The MAKTEK Eurasia exhibition was a new venture for TIAD, the Turkish association in CELIMO. This proved to be very successful with 59,600 visitors from 65 countries, with just over half of these from Europe. There were 957 exhibitors from 34 countries exhibiting across the 12 halls. Following the success of this exhibition, the next edition will take place from 14th to 19th October 2014.

Turkey: TIAD held the Concluding and Closure Conference of their VOC - Test Centre Project on June 1, 2013. This project was conducted within the framework of VOC-Test Centre Grant Scheme financed by EU and coordinated by TIAD. It was conducted with the partnership of the Dutch Centre of Expertise on Vocational Education, Training and the Labour Market, KENTEQ, the Turkish Ministry of Science, Industry and Technology, Romanian research institution INMA and Bahçeşehir University Vocational and Technical Education Development Centre (METGEM).

Aiming to find a solution to the unemployment problem of the sector with the EU grant, TIAD Vocational Test Centre (TIAD MTM) was founded on September 28, 2012. As the next step, TIAD is planning to issue proficiency certificates for 2,500 people until 2015.

Following the accreditation processes foreseen to be completed in September 2013, TIAD will be conducting examinations for measuring vocational qualifications of the individuals in the sector and be giving Vocational Qualifications Authority (MYK) and Turkish Accreditation Agency (TURKAK) approved certificates to those who succeed.

CELIMO COUNCIL MEETING

The main topics of discussion at the Council meeting this year were:

- The visit to India
- The proposal for Associate Members;
- The guidance document for Agency Contracts;
- The annual Economic Report and presentation with updates from delegates on the latest situation in their countries.

All of the reports and presentations are available from your national secretariat.

CELIMO MISSION TO INDIA IN JANUARY 2013

As members will be aware, as a follow-up to last year's pilot visit, at the invitation of our partners IMTMA, CELIMO organised another Mission to visit India, this time in conjunction with the IMTEX exhibition which was focussed on metal cutting machines.

Although it was slightly disappointing that we only had 3 delegates, in addition to the President and Secretary, this was a very useful mission and business has arisen directly from it and a number of useful contacts were made.

Our hosts looked after the group very well with transport to and from the exhibition each day, as well as the opportunity to meet many of the Indian manufacturers of machine tools and accessories. A large number of stands were visited by the group and an interactive meeting gave the opportunity for the CELIMO delegates to make their presentations. We also made 6 factory visits, all of which were valuable in different ways; these included companies making machine tools, work-holding equipment and automotive components.

A report on the mission was presented to the recent CELIMO Council meeting and we are updating this with a list of contacts made during the exhibition. The next opportunity to meet with the Indian manufacturers will be during EMO and they will be attending our International meeting. If you are interested in making contact with manufacturers from India, please get in touch via your National Association.

OTHER ASSOCIATIONS NEWS

CECIMO: In March, CECIMO published a leaflet titled "Drivers of Growth in the European Machine Tool Industry". The report discusses 6 drivers of growth for the machine tool industry - globalisation, innovation, marketing, skills, supply chain relations and sustainability. The publication gives an overview of strategies employed by European manufacturers to tap into the opportunities created by the needs of newly industrialising regions of the world. You can get this document from the CECIMO web-site at www.cecimo.eu.

AMT (USA): In March, AMT announced that it had elected a new Board of Directors and Officers; Mr R Stephen Flynn, President of Optical Gaging Products, was elected as Chairman to serve for the coming year.

JMTBA: At their annual meeting, held in Tokyo in May, the JMTBA Board of Directors named Mr Yoshimaro Hanaki, President of Okuma Corporation, to serve as Chairman of the association for a two year term.

INTERNATIONAL EXHIBITIONS

JIMTOF: Fritz Daunert, the Board member from Spain was at JIMTOF and has given this report.

JIMTOF 2012 was held in Tokyo from November 1st to 6th. My general impression compared with previous editions was that the halls were full of people, with many more visitors than the 2010 edition. This impression was confirmed to me by all the exhibitors that I spoke with, as they told me that they had had more enquiries than in the past and with a deeper interest. It seemed that Japan was again in a mood to buy new machinery to upgrade their industries.

2012 had been a good year in terms of machines sales in part for the replacement orders for all the machinery lost in the Sendai area (an industrial area for automotive components) due to the Tsunami suffered in Japan in 2011 as well as the replacement machinery for the October 2011 floods in Thailand which destroyed hundreds of CNC machines in the industrial areas.

In terms of new machinery, the general tendency observed was clearly to finish the parts in the minimum possible clampings and therefore a huge increase in the number and solutions of 5 axis machining centers (including in them turning operations), and the ever more complex CNC lathes capable of doing every time more and more operations that in other time belonged to other type of machines (milling, gear hobbing, etc.).

EMO: The latest news from EMO is that by the end of June there were 2,030 companies registered to exhibit on a net exhibition area of over 177,600m².

Only 40% of the exhibitors are from Germany, with the remaining 60% coming from 39 other countries; 430 firms are from Asia.

CELIMO WEB-SITE

We are currently having difficulty in updating the CELIMO web-site at www.celimo.com; we hope to be able to resolve this shortly.

EUROPEAN LEGISLATION

Restriction of Hazardous Substances

(RoHS): The recast European RoHS2 Directive 2011/65/EU has been transposed in the national laws of the member states as from 1 January 2013. Following consultation on its FAQ guidance the European Commission has confirmed that most industrial machine tools remain categorized as large-scale industrial tools (LSIT) and are therefore excluded from the RoHS2 scope. The lower limit of 'large-scale' is not clearly defined for LSIT but the relevant guidance suggests bench-top tools are not generally regarded as LSIT and may be considered within RoHS2 by some authorities. The revised FAQ guidance has been published as a 'living document', i.e. may be subject to further revision, at: http://ec.europa.eu/environment/waste/rohs_ee/e/events_rohs3_en.htm

The RoHS2 directive and official FAQ guidance are important for two reasons; firstly the direct concern for materials used in our industry and secondly its definitions which may be used in the WEEE (Waste Electrical and Electronic Equipment) Directive.

Waste Electrical & Electronic Equipment

(WEEE): The recast WEEE2 Directive 2012/19/EU was published in the July 2012 EU Official Journal with transposition by 14 Feb 2014. EC work has started work on the FAQ guidance with a scope impact study now due. In view of the outcome for RoHS2 it is expected that the industrial machine tools LSIT exclusion from WEEE2 will similarly be confirmed.

Registration, Evaluation, Authorisation and Restriction of Chemical Substances

(REACH) - Nanomaterials: Further to the EC review adopted in Feb 2013 and impact assessment of regulatory options, the prospective draft legal implementing measure could be in place by Dec 2013.

Eco-Design Directive - Machine tools:

Following the DG Envi/Fraunhofer working group reports the Commission's next step will be an impact study report from consultants Bio Intelligence. The report will be due in Oct/Nov and on this basis the key decision by the legislators next February will be whether to opt for legal implementing measures or CECIMO's self-regulation initiative (SRI).

More details of web-links on these various topics are available from the Secretariat via your national associations.

CELIMO EXECUTIVE BOARD

The Board met in February and June with a range of topics for discussion including:

- Updating the CELIMO guidance document for agency agreements;
- The new category of Associate Members;
- Plans for activities at EMO;
- Financial position and budget for 2014.

STATISTICS

CELIMO Trends Survey: The report of the 1st quarter of 2013 survey is available to those associations who participated in the survey. Data collection is underway for the survey covering the 2nd quarter of 2013 and the report will be issued as soon as possible once all of the returns are received.

Eurostat report: Eurostat, the European Statistics Agency, has published an analysis of industry output data split into 4 categories:

- High Technology
- Medium-high Technology
- Medium-low Technology
- Low Technology

The analysis shows that from the 1st quarter of 2005 to the 3rd quarter of 2012, the overall level of output for industry as a whole is broadly unchanged, but output for high technology manufacturing has grown by +26% while output of the medium-low and low technology groups has fallen. This is important for our sector because the growth sectors include most customers for machine tools and related tooling. The recovery in the high technology sector was led by aerospace, with industries such as motor vehicles, machinery and electrical equipment leading the way in the medium-high technology category. You can get the Eurostat report from their [web-site](#) (it is only published in English).

European Commission Quarterly Manufacturing Survey, July 2013: The European Commission (EC) gathers together

data from surveys in the EU countries that look at issues such as confidence, orders trends and capacity utilisation. For the EU, the overall sentiment index increased in July, with industry confidence improving on the back of better order books and expectations for production.

In the latest quarterly data (described as Quarter 3 because it is carried out in July), the Commission reports a lengthening of order books in the euro-zone compared to the April survey, but more importantly, the estimated rate of capacity utilisation increased to 78.3%, while for the EU as a whole it rose to 78.1%.

More details of these results can be found in the report of the EC Business and Consumer Survey under the [Economic Sentiment Indicator \(ESI\) link](#).

EXHIBITION DIARY

Here is a list of exhibitions in Europe during what looks like a busy Autumn of 2013; this is led of course by EMO which returns to Hannover in September.

Czech Republic: MSV, 07-11 October 2013, Brno

Denmark: HI INDUSTRI, 03-06 September 2013, Herning

Estonia: INSTRUTEC, 13-15 November 2011, Tallinn

Finland: TEKNOLOGIA, 01-03 October 2013, Helsinki

France: SIANE, 22-24 October 2013, Toulouse

Germany: 16-21 September 2013, Hannover, EMO, www.emo-hannover.de

Germany: BLECHEXPO/SCHWEISSTEC 05-08 November 2013, Stuttgart

Germany: EUROMOLD, 03-06 December 2013, Frankfurt

Italy: MECHA-TRONIKA, 23-26 October 2013, Milan

Poland: TOOLEX, 01-03 October 2013, Sosnowiec (Expo Silesia)

Poland: EUROTOOL and BLACH-TECH-EXPO, 15-17 October 2013, Krakow

Romania: TIB, 16-19 October 2013, Bucharest

Russia: INTERTOOL, 01-04 October 2013, Moscow

Russia: MASHEX, 29 October - 01 November 2013, Moscow

If you know of any other events that we have missed, please let the Secretary know so that we can update the list.