

About your company

This EPMA survey is looking specifically at Metal Injection Moulding to provide an overview of the industry.

We are interested in data from companies that are **producing, or at least selling, MIM parts in Europe**. The survey this year is to collect data for the year **2024**.

All answers and data provided will be kept confidential at EPMA so the averaged results are shown anonymously and the list of participating companies will not be communicated.

During the survey, you will have the choice to answer also to the **Benchmarking Survey, that is reserved to current EPMA member companies**. You can opt out if you are not member or do not wish to fill it, and you will be taken to the end of the survey; otherwise, you will be asked for detailed information and we advise to refer to the Guidelines for Benchmarking to have instructions on how to answer those questions.

If you need EPMA to sign a Non-Disclosure Agreement **before** filling in this questionnaire, please contact Bruno Vicenzi: bv@epma.com. Alternatively, you can answer to Question 5 accordingly, and you will get your signed NDA as soon as possible.

* 1. Your Name

* 2. Company Name

* 3. Company Location (Town, Country)

* 4. Email address for further contact/feedback

5. Do you need EPMA to sign a Non Disclosure Agreement?

☐ Yes

☐ No

6. What type of company is yours?

- ☐ Raw Materials (excluding powder)
- ☐ Powder Manufacturer
- ☐ Feedstock Manufacturer
- ☐ Equipment Supplier
- ☐ MIM Components Manufacturer (Including end users making own parts)
- ☐ MIM End User (Not producing parts)
- ☐ Other (please specify)

7. How many people of your personnel are working in the field of MIM?

8. What is the percentage of your MIM products are used in house (internally)?

0

100

Definitions:

MIM companies produce either as subcontractors or as producers for in house use or both.

- Products produced for in house use or for sale to related companies are defined as internal (internal sales).

- Products produced for sales to not related companies are defined as external (external sales).

- The aggregate of internal and external sales is defined as overall sales.

- All sales and tonnage numbers are to be stated for **2024**.

Sales Trends - Now and over the last 12 months**9. How do you rate your overall MIM-related sales over the last 12 months?**

- ☐ Very Good
- ☐ Good
- ☐ Fair
- ☐ Poor
- ☐ Very Poor

10. What are your company's overall MIM-related sales over the last 12 months?

(For internal sales please estimate the sales value the products would have had if they had been sold externally and add this number to the number of external sales.)

- ☐ Less than 1,000,000 €
- ☐ 1,000,000 € - 4,999,999 €
- ☐ 5,000,000 € - 9,999,999 €
- ☐ 10,000,000 € - 19,999,999 €
- ☐ 20,000,000 € - 29,999,999 €
- ☐ 30,000,000 € - 39,999,999 €
- ☐ 40,000,000 € - 49,999,999 €
- ☐ 50,000,000 € - 69,999,999 €
- ☐ 70,000,000 € - 99,999,999 €
- ☐ More than - 100,000,000 €

11. In the last 12 months, how did your overall MIM-related sales perform in comparison with the previous 12 months?

- ☐ Increased strongly
- ☐ Increased slightly
- ☐ Remained more or less the same
- ☐ Decreased slightly
- ☐ Decreased strongly

12. If your MIM income increased, what do you feel was the main cause?

- ☐ Produced more parts for more or less the same customers
- ☐ Added important new customers in known markets
- ☐ Opened important new markets
- ☐ Increased average part selling price
- ☐ Other (please specify)

13. If your MIM income decreased, what do you feel was the main cause?

- ☐ Competition from other European MIM companies
- ☐ Competition from non-European MIM companies
- ☐ Competition with other technologies
- ☐ Less parts produced for existing customers
- ☐ Other (please specify)

Future Trends

14. How do you rate your overall MIM-related sales in the next 12 months?

- ☐ Strong increase
- ☐ Slight increase
- ☐ More or less the same
- ☐ Slight decrease
- ☐ Strong decrease

Data for Statistics Yearbook: Exports

15. Can you indicate your Geographical Breakdown of sales (Percentage)

Home Country (do
not double count in
the details below)

EU27

Europe (Non EU27)

Asia

North America

Other

Type of Company

16. We now have some specific questions based on what type of company you are - please specify below to go to the correct page

- ☐ Powder Manufacturer
- ☐ Raw Materials (excluding powder)
- ☐ Feedstock Manufacturer
- ☐ Equipment Supplier
- ☐ MIM Components Manufacturer (Including end users making own parts)
- ☐ MIM End User (Not producing parts)

Capacity

17. Can you indicate how much of your current MIM capacity is used at the moment? (0-100%)

0

Percentage

100

*** 18. Will you be adding production capacity in the next 12 months?**

☐ Yes

☐ No

Capacity (Component Manufacturers)

19. Can you indicate how much of your current MIM capacity is used at the moment? (0-100%)

0 Percentage 100

20. Will you be adding production capacity in the next 12 months?

☐ Yes

☐ No

Prospects

21. Which of the following sectors do you see offering the best medium term prospects for MIM?

- ☐ Aerospace
- ☐ Automotive
- ☐ Construction
- ☐ Consumer Goods
- ☐ Defence
- ☐ Electronics
- ☐ Medical
- ☐ Tools
- ☐ Other (please specify)

22. In your opinion, what are the top 3 problems that slow down the widest acceptance of MIM?

	Biggest Problem	Second Biggest Problem	Third Biggest Problem
Price competition with other technologies	☐	☐	☐
Technical competition with other technologies	☐	☐	☐
Price competition from low-production-cost countries	☐	☐	☐
Customers reluctant to access new technologies in a period of economic uncertainty	☐	☐	☐
Long time to market	☐	☐	☐
Difficult to market the technology due to the lack of trained agents	☐	☐	☐
Insufficient awareness of MIM by customers and their designers	☐	☐	☐
Bad quality parts supplied by some companies that damage trust on all MIM companies	☐	☐	☐
Lack of international standards on properties of MIM materials	☐	☐	☐

Your Facilities and Processes

23. How many injection moulding machines are you currently using in your MIM production?

24. Are you producing your MIM feedstocks in-house?

- ☐ Yes
- ☐ No

25. Are you using robotic handling of green parts on your moulding machines?

- ☐ Yes - on all moulds
- ☐ Yes - on most mouldsAutomotive
- ☐ Yes - on about half of the moulds
- ☐ Yes - on a few moulds
- ☐ No

26. Are you using continuous sintering furnaces in your company?

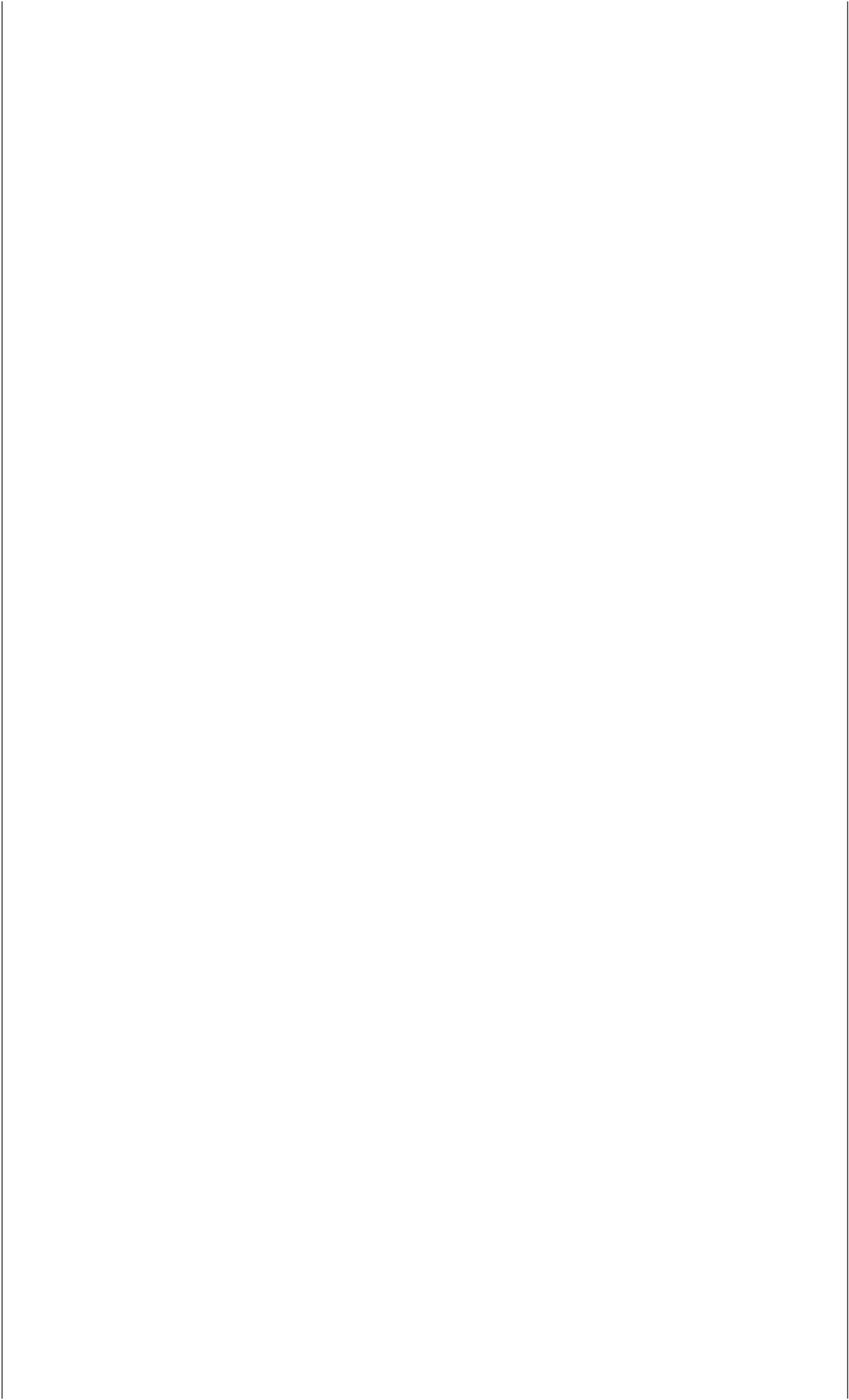
- ☐ Yes
- ☐ No

27. What kind of debinding systems are you using for your (commercial) MIM parts?

- ☐ Thermal only
- ☐ Solvent only
- ☐ Solvent and Thermal
- ☐ Catalytic and Thermal
- ☐ Water and Thermal
- ☐ Other (please specify)

28. Are you producing your MIM moulds in-house?

- ☐ Yes
- ☐ No



Sustainability

We are asking here simple questions about your entity's attitude towards sustainability. We also have a thorough questionnaire that you are welcome to take later if you want to compete for the EPMA Sustainability Award for 2025 (<https://europm2025.com/epma-sustainability-award/>).

29. Does your company have (tick the relevant boxes):

- ☐ a regular sustainability report
- ☐ a sustainability website/website section
- ☐ a business ethic code of conduct

*** 30. Does your company have running (answer yes using the dropdown menus if you have an action and/or a target for each issue):**

	An action	A target
LCA (Life Cycle Assessment / Life Cycle Analysis / Life Cycle Thinking)		
CO2 reduction		
CO2 neutrality		
Reduction of energy consumption		
Reduction of water consumption		
Gender equality		
Diversity & inclusion		
Reduction of frequency of accidents		

Data for Statistics Yearbook: Sales

31. Please give an approximate figure of your overall sales of MIM products in 2024 in million € (use . for decimals, do not use , Example: 3.78 means 3 780 000€)

32. Please enter your approximate sales percentage by sector (value)

Aerospace	
Automotive	
Armament	
Construction	
Consumer Goods	
Hand power tools	
Medical	
Nuclear	
Tooling	
Others	

33. Please give your best estimate of the overall tonnage of powder or feedstock used for your MIM products in 2024 in tons.

34. Please enter your approximate production percentage by sector (tonnage)

Aerospace	
Automotive	
Armament	
Construction	
Consumer Goods	
Hand power tools	
Medical	
Nuclear	
Tooling	
Others	

Data for Statistics Yearbook: Production

35. Please give your best estimate of the tonnage of powder used for your MIM products in 2024 (in tons)

36. Please give your best estimate of the tonnage of MIM products you produced in 2024 (in tons)

37. Please provide the % of your MIM parts that are:

Structural Parts

Sintered Magnet
Parts

Hard Metal Parts

Other

38. Please estimate the % share (in volume) of the following materials used:

(please:

- enter an integer figure for each line by rounding to the nearest, e.g., 30 for 30% or 30.4% or 29.6%

- use 0 if you use that alloy just marginally, below 0.5%, but leave blank if you do not use it at all

- the sum of all lines must be 100)

Stainless steels, austenitic	
Stainless steels, non austenitic	
Magnetic alloys	
Low alloy steels	
Tool steels	
Heavy alloys	
Titanium and Ti alloys	
Copper alloys	
Nickel alloys	
Hardmetals/cermets	
Others	

Benchmarking Survey

39. If your company is EPMA member, would you like to take part in the EPMA's MIM Benchmarking Survey?

(if yes, we suggest to use the updated Guidelines for Benchmarking as a reference to understand correctly all data required)

☐ Yes

☐ No

Benchmarking Survey (Part 1 of 2)

40. Average sales price (€/kg)

- ☐ 0-50 €/kg
- ☐ 50-100 €/kg
- ☐ 100-200 €/kg
- ☐ 200-400 €/kg
- ☐ Over 400 €/kg

41. Overall MIM-related sales with new parts (percentage, rounded up to the nearest integer)

- ☐ 0-5%
- ☐ 6-15%
- ☐ 16-25%
- ☐ Over 25%

42. Productivity (€ per person)

(Overall MIM-related sales divided by aggregate number of full time personnel)

- ☐ 0-50k €/person
- ☐ 50k-100k €/person
- ☐ 100-150k €/person
- ☐ Over 150k €/person

43. Production space utilisation (€/m2)

(Overall MIM-related sales divided by production space) €/m2)

- ☐ 0-2000 €/m2
- ☐ 2001-3000 €/m2
- ☐ 3001-4000 €/m2
- ☐ Over 4000 €/m2

44. Inventory stock turn

(Overall MIM related sales/year divided by end of the year inventory level, rounded up to the nearest integer)

- ☐ 0-5
- ☐ 6-10
- ☐ 11-15
- ☐ Over 15

45. On time delivery

(Percentage of on time deliveries, rounded up to the nearest integer)

- ☐ 0-25%
- ☐ 26-50%
- ☐ 51-75%
- ☐ Over 75%

46. Customer returns (PPM)

(Number of parts returned divided by number of parts delivered)

- ☐ 0-500
- ☐ 500-1000
- ☐ 1000-2000
- ☐ Over 2000

Benchmarking Survey (Part 2 of 2)

47. Overall Equipment Effectiveness (OEE) Percentage (rounded up to the nearest integer)

- ☐ 0-30%
- ☐ 31-50%
- ☐ 51-80%
- ☐ Over 80%

48. Training per employee (Hours/year)

- ☐ 0-24
- ☐ 24-60
- ☐ 61-100
- ☐ Over 100

49. Cost of non-performing after final stage (percentage, rounded up to the nearest integer)

(Cost of internal scrap + rework + credit notes divided by sales)

- ☐ 0-2%
- ☐ 3-5%
- ☐ 6-8%
- ☐ 8-10%

50. Energy usage (percentage of overall sales, rounded up to the nearest integer)

- ☐ 0-3%
- ☐ 4-7%
- ☐ 8-10%
- ☐ Over 10%

51. Total Tool Changeover Time (Hours)

- ☐ 0-1
- ☐ 1-2
- ☐ 2-3
- ☐ Over 3

52. Number of Direct Production Personnel

53. Gross yearly average wage (€)

(Total personnel cost divided by aggregate number of full time personnel)

- ☐ 0-20k
- ☐ 20-30k
- ☐ 30-40k
- ☐ 40-50k
- ☐ 50-60k
- ☐ Over 60k

54. Absenteeism (percentage of average time absent)

- ☐ 0-3%
- ☐ 3-6%
- ☐ 6-9%
- ☐ Over 9%

55. Participation of production personnel

- ☐ 0-0.5
- ☐ 0.5-1.0
- ☐ 1.0-2.0
- ☐ Over 2.0

56. Are there any comments you would like to add?

End of Survey

Thank you for taking the time to complete this survey, we appreciate your input.

Please note that pressing 'Finish' will submit your answers and you will not be able to change your responses once you have submitted your survey.

57. Are there any comments that you would like to add?

**58. Would you like to receive a pdf version of the survey you have just filled in ?
The file will not be generated before April 2024.**

☐ Yes

☐ No