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## Swiss Manufacturing Survey

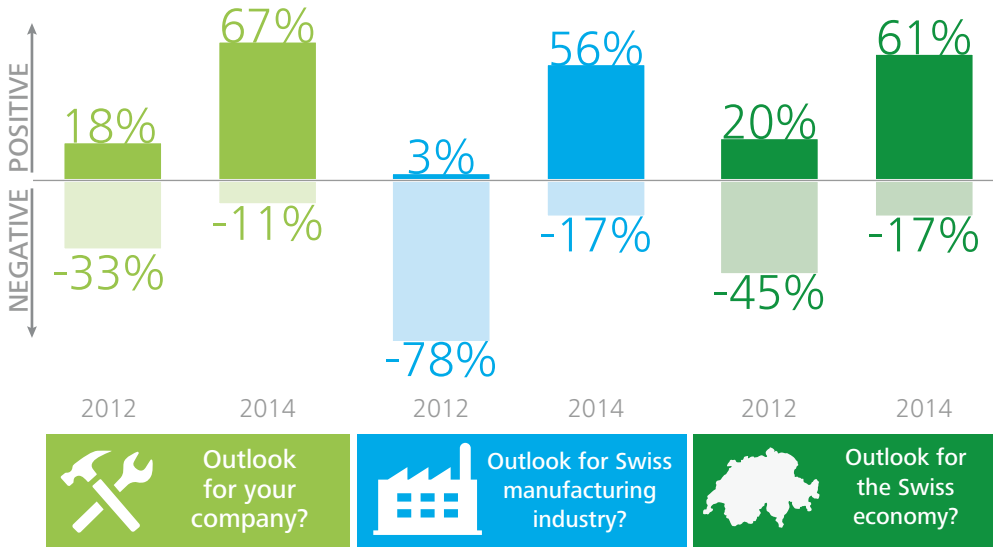
Outlook is bright and growth is back on the agenda



## A BRIGHTER OUTLOOK FOR THE SWISS MANUFACTURING INDUSTRY

The majority of Swiss manufacturers assess the prospects for themselves, their industry and the Swiss economy as more positive than two years ago

Positive, negative and unchanged outlook of Swiss manufacturers for the next 12 months



## EXCHANGE RATE ISSUES CONTINUE TO BE A KEY TOPIC

In addition, Swiss manufacturers are even more concerned about the increased productivity and innovative products of their competitors than two years ago

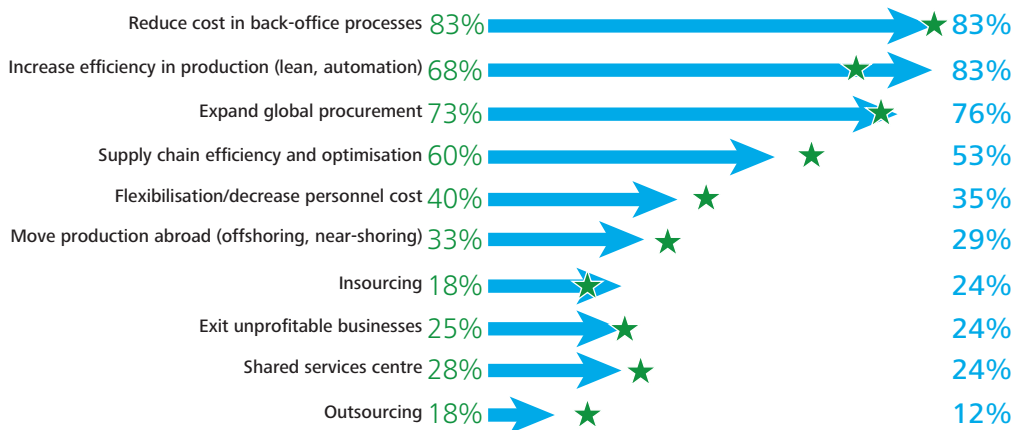
Main reasons why the Swiss manufacturing industry faces increased global competition

	2012	VS	2014
Foreign currency pressure	95%	↘	82%
Technologically improved products of competition	50%	↗	59%
Increased productivity of competition	33%	↗	41%
Lower wages and infrastructure cost (e.g. electricity, communication, facilities) of competition	48%	↘	41%
Weakness in demand in primary markets	35%	↘	24%
Protectionism, especially in new growth markets	13%	↗	24%

# CUTTING BACK-OFFICE COSTS AND PRODUCTION EFFICIENCY ARE ON THE TOP OF THE MANAGEMENT AGENDA

Expanding global procurement and insourcing have become more important

Top 10 strategies of Swiss manufacturers to increase efficiency and reduce cost in the next 12 months

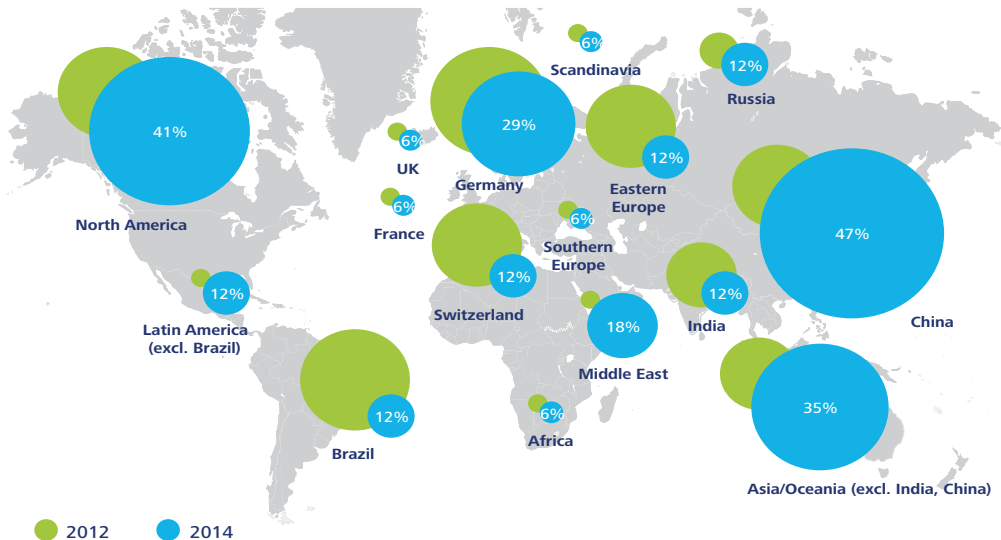


Key: ★ 2012 → 2014

# GROWTH IS BACK AND STRONGEST IN ASIA AND NORTH AMERICA

Growth in Switzerland was substantially lower than two years ago

Countries/regions in which Swiss manufacturers achieved the highest growth in the past 12 months



## CLIENT PULL FOR CUSTOMISATION IS MORE IMPORTANT THAN PUSHING PRODUCTS TO MARKET

Better understanding of client and customer needs is key for growth

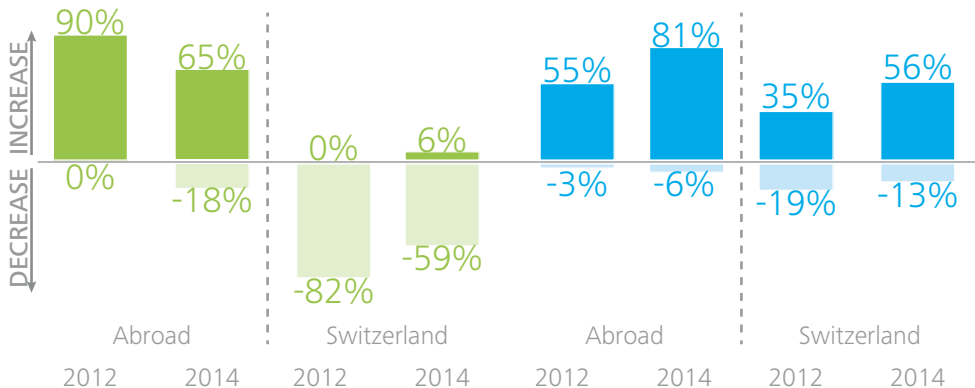
Key strategies of Swiss manufacturers that support growth in both developed and emerging markets

	2012	VS	2014
Tailoring the provision of goods and services to customer segments	Not asked	—	68%
Increased investment/new product development	54%	↘	50%
New distribution strategy/sales offices	55%	↘	50%
Expansion/build-up of own production capacities	23%	↗	26%
Mergers and acquisitions/purchasing business units	20%	↘	18%
Joint ventures/strategic alliances in production	23%	↘	9%

## PRODUCTION RELOCATION IS HERE TO STAY WHILE INCREASED EFFORTS ARE MADE TO REMAIN INNOVATIVE

Production continues to shift abroad, although more slowly, and R&D is on the rise in Switzerland and even stronger abroad

Increased, decreased and unchanged number of production facilities and R&D capacity for the next few years



Change of production facilities of Swiss manufacturing industry?



Change of R&D capacity of Swiss manufacturers?

## Find out more

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# Solutions approaches

## **White Paper on Swiss Manufacturing Industry**

[www.deloitte.com/ch/mfgwhitepaper](http://www.deloitte.com/ch/mfgwhitepaper)

## **Swiss Innovation Study**

[www.deloitte.com/ch/mfginnovation](http://www.deloitte.com/ch/mfginnovation)

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