

REGIONAL PERFORMANCE

Bühler has systematically localized its resources and offers manufacturing sites, service stations, sales offices, R&D facilities, and research and training centers in 66 countries, and is active in over 140 countries.

NORTH AMERICA



Highlights

In North America, our Die Casting and Milling Solutions businesses continued to grow with another very strong year in Canada. We continued to develop and engage with the food ecosystem in the region, deepening our involvement with key players such as North Carolina Food Innovation Lab, MISTA in the San Francisco Bay Area, and Tuft University in Greater Boston. The increase in service options for customers resulted in robust growth in Bühler Service Agreements. In 2025, we will continue development of our market segmentation to ensure we build customer intimacy.

22%

Turnover

927 (-0.4%)
Employees¹

SOUTH AMERICA



Highlights

In South America, business development mirrored the region's economic development. In Brazil, after a strong start in the first half of the year in Milling Solutions, Oil Preparation, and Customer Service, in the second half, many projects were put on hold mainly due to political reasons. A breakthrough was the launch of our color sorter SPARK, which was well received by our rice customers. In Argentina, we closed new projects in wheat milling and feed. Our operations in Colombia, Ecuador, and Venezuela suffered from local political instability. Peru is the only country where we had substantial investments in milling and feed.

6%

Turnover

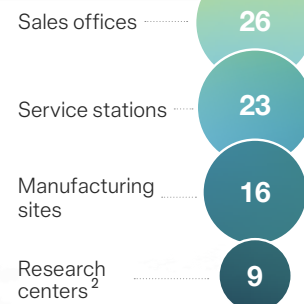
568 (-0.04%)
Employees¹

27%

Turnover

6,046 (-2.4%)
Employees¹

EUROPE



Highlights

Inflation spikes and geopolitical conflicts led to reduced order intakes in previous years, adversely affecting turnover. Despite ongoing sluggishness in sectors like the automotive industry, the food industry in Europe has renewed its investment activities, resulting in a 3.6% increase in overall order intake. This resurgence sets high expectations for turnover growth in 2025. Organizationally, the region has continued to enhance its capabilities in sustainability services, digitalization, and plant performance assessment, all contributing to the growth of our Customer Service business. Simultaneously, we are optimizing our organizational footprint.

16%

Turnover

2,900 (-4.7%)
Employees¹

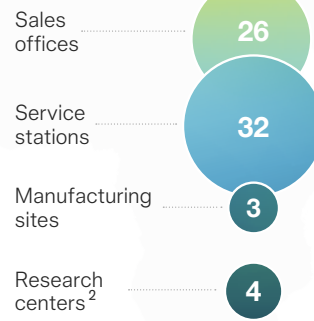
GREATER CHINA REGION



Highlights

Compared to 2023, our financial performance in the Greater China Region in 2024 demonstrated robustness, despite lower-than-expected top-line performance due to the overall challenging situation in China's economic landscape. Leybold Optics' series of local developments have allowed it to thrive in this environment, achieving outstanding performance across various sectors, including consumer electronics, semiconductors, glass coating, and even the solar energy business. Innovation is key to success in China. Bühler China was nominated for the BIG Whale 50 2024 awards for innovation ecosystem development and open innovation.

MIDDLE EAST AFRICA & INDIA



Highlights

Despite a challenging year marked by wars, droughts, and political instabilities, the region demonstrated remarkable resilience and growth. Order intake was bolstered by securing key projects and we reactivated over 200 customers. A significant milestone was the successful integration of our plansifter and mid-size oven into the manufacturing portfolio in India. The opening of our Grain Processing Innovation Center in Kano, Nigeria, was a transformative step toward developing innovative, locally adapted solutions for grain processing in Africa. This initiative not only reinforces our commitment to the region but also closes the loop with South-South collaborations.

19%

Turnover

1,386 (+11.5%)
Employees¹

SOUTHEAST ASIA



Highlights

The region encountered a challenging year in terms of orders. Many projects did not materialize at the anticipated pace and are now expected to occur in 2025. Despite these setbacks, we put in tremendous efforts to optimize our operations and were able to secure solid profitability. We also took this period as an opportunity to realign our team structure, making it more agile and responsive to local needs. By enhancing our operational flexibility and responsiveness, we are better positioned to address market demands effectively. Looking ahead, these strategic adjustments will enable us to seize the full potential that 2025 holds.

10%

Turnover

523 (+3.7%)
Employees¹

Total number of Bühler sites across the world in 2024:

- 90 sales offices
- 105 service stations
- 31 manufacturing sites
- 26 research and training centers²

 = 2024 turnover share by region
 = Total 12,350 employees¹ in 2024 compared to 12,485 in 2023

¹ FTE (= full-time equivalent)

² Bühler has research and training centers in 26 locations around the world, some of which cover multiple industrial applications.