AlixPartners

MANUFACTURING OVERVIEW: CY2026 – Q1

QUARTERLY SUMMARY OF KEY TRENDS & CHALLENGES

Manufacturers entered 2026 with geopolitical risks and volatility in the market resulting in flat revenues and mixed margins. US demand remained firm, Germany improved with increased exports and China's growth was uneven by sector. With costs continuing to rise, productivity and utilization have become the central levers for profitability amid persistent labor cost pressures and shrinking headcount.

PRODUCTIVITY

Productivity has become the primary lever for output growth. Manufacturers across regions are looking to invest in automation and robotics. Co-bots, conveyers and visual quality inspection systems are some first steps being taken in the automation journey.

UTILIZATION AND FUTURE FOOTPRINT

Manufacturers are looking to right-size capacity to obtain good utilization of assets. Regional Strategy and Manufacturing Footprint Optimization are currently front of mind for executives.

LABOR

Labor markets stayed tight and costly even as employment softened. The US continues to face persistent labor cost pressures, German manufacturing jobs and openings continue to decline, and China is lifting output without adding workers. Thus, pointing to a structural shift toward automation and higher-skill roles.

REGIONAL DIVERGENCE

Manufacturing performance varied sharply by region. US demand held firm as tariff and policy effects began to normalize; Germany strengthened on rising capacity utilization, exports and an improving IFO business climate; and China posted an uneven recovery led by Auto & Advanced Manufacturing.

FINANCIAL PERFORMANCE OF MANUFACTURERS

MIXED PERFORMANCE ACROSS INDUSTRIES LIKELY DUE TO GEOPOLITICAL UNCERTAINTIES

INDUSTRY[2]	REVENUE TTM				GROSS MARGIN TTM				INVENTORY TURNOVER TTM			
	Q2 '25	Q3 '25	Q4 '25	Q1 '26	Q2 '25	Q3 '25	Q4 '25	Q1 '26	Q2 '25	Q3 '25	Q4 '25	Q1 '26
Aerospace & Defense	+	+	+	+	+	+	+	+	+	+	+	-
Automotive	+	-	-	+	-	-	-	-	-	+	-	+
Chemicals	+	-	-	-	+	+	+	+	+	-	+	-
Consumer Electronics	++	-	+	+	-	-	+	+	-	-	+	-
Energy & Utilities	-	-	-	-	-	++	+	++	-	+	+	-
Food & Beverage	+	+	+	+	-	-	-	+	-	+	+	-
Health & Beauty	+	-	-	-	-	-	-	-	-	-	+	-
Household Durables	+	-	-	-	-	-	-	-	-	+	-	-
Industrial & Building Products	+	-	-	+	-	-	-	+	-	+	+	-
Metal & Mining	+	+	+	+	-	+	+	+	-	+	-	+
Paper & Pulp Products	+	-	-	-	-	-	-	-	-	+	+	-

QoQ Trend Legend		
"++" OR "- -"	Change in Revenue & Gross Margin exceed +/-5%	Change in Inventory Turn exceeds +/- 0.5
"+" OR "- "	Change in Revenue & Gross Margin within +/-5%	Change in Inventory Turn within +/- 0.5

INDUSTRY[1]	% OF COMPANIES THAT BEAT MARKET EBITDA ESTIMATES			
	Q2 '25	Q3 '25	Q4 '25	Q1 '26
Aerospace & Defense	70%	83%	65%	67%
Automotive	59%	60%	71%	68%
Chemicals	62%	80%	45%	76%
Consumer Electronics	55%	42%	52%	78%
Energy & Utilities	71%	85%	74%	85%
Food & Beverage	70%	75%	57%	68%
Health & Beauty	80%	59%	75%	80%
Household Durables	65%	57%	43%	48%
Industrial & Building Products	80%	67%	85%	53%
Metal & Mining	73%	68%	73%	68%
Paper & Pulp Products	35%	50%	31%	41%

QoQ Change | *Positive* | *Negative or flat*

COMMENTS

- Supply chain realignments due to on-going geopolitical pressures are likely drivers of QoQ volatility
- Resilience and upskilling the organization continue to be the focus for executives to tackle disruptions

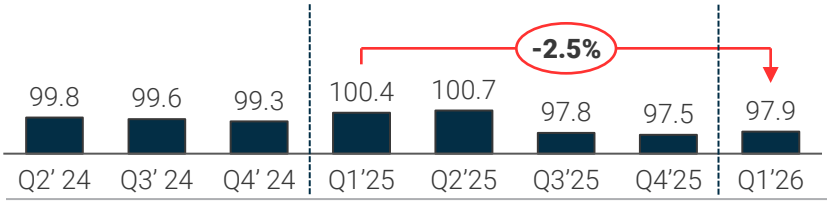
Note: Companies within industries include Top 40 global public companies by revenue; based on data available at time of publication
(1) based on market consensus on EBITDA estimates vs actuals, calculation based on companies with available data only
(2) metric trend based on median in industry group

MACRO KPI (USA) - PRODUCTION AND CAPACITY

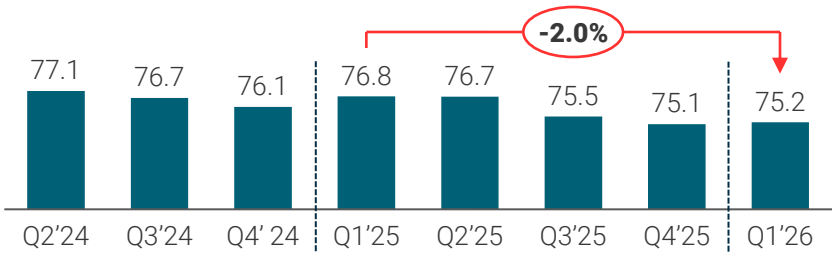
US MANUFACTURING IS INCREASINGLY ADAPTING TO TARIFFS AS GEO-POLITICAL RISKS CONTINUE

CALENDAR QUARTER BY QUARTER CHANGE

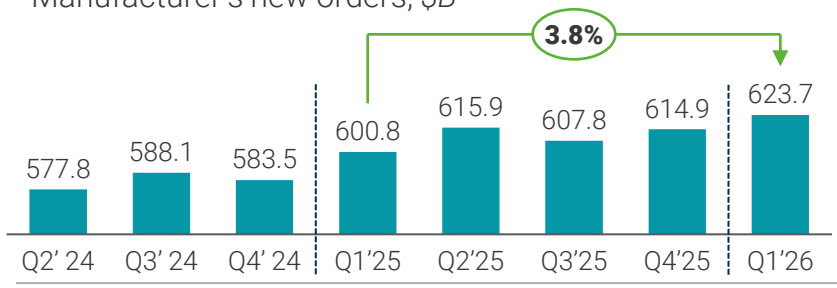
Manufacturing production *(indexed to 2017 production)*



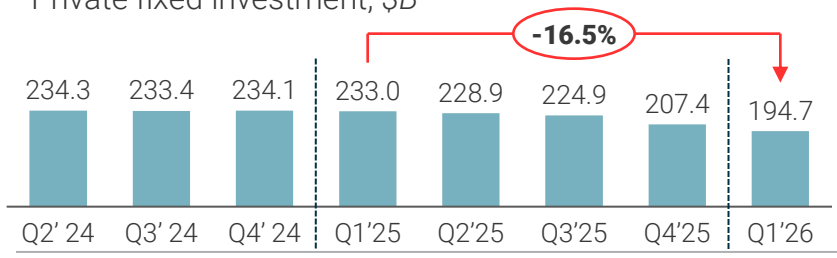
Manufacturing capacity utilization, %



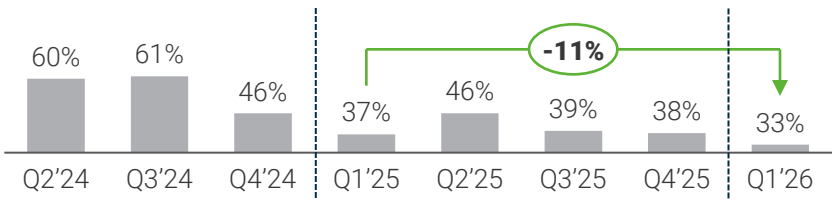
Manufacturer's new orders, *$B*



Private fixed investment, *$B*



Unfavorable business climate (taxes, regulations, etc.),
% of respondents agreeing with the statement



HIGHLIGHTS

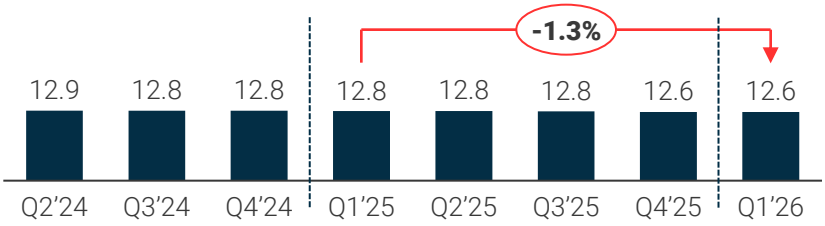
- The early-2025 tariff-driven production spike has faded, and output is settling back to the pre-surge baseline.
- Manufacturers are scaling back production as the urge to build inventory diminishes
- Manufacturers are running below historical utilization, suggesting producers have not yet found a floor in demand.
- Continued underutilization increases pressure on margins and raises the risk of further capacity rationalization.
- Strong orders without production gains signals low conviction with customers hedging or manufacturers doubting demand durability.
- New order demand is climbing, likely fueled by the AI and data center buildout driving capital equipment needs.
- Manufacturers are putting investment plans on hold, prioritizing cash preservation over long-term growth.
- Until trade, policy, and interest rate visibility improves, capital deployment is likely to remain constrained.
- Sentiment has shifted meaningfully as manufactures are growing more comfortable operating in the current environment.
- Adaptation, not resolution, appears to be driving the improvement as structural uncertainties remain in place.

MACRO KPI (USA) - LABOR

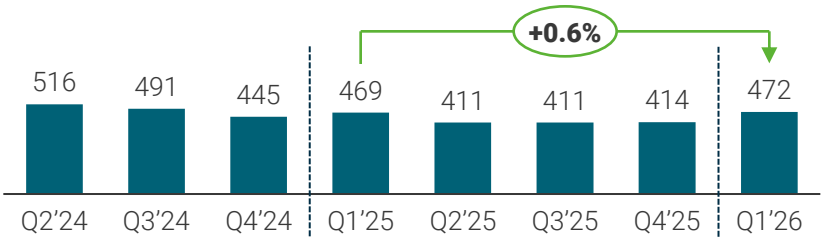
US MANUFACTURING LABOR MARKET REMAINS CHALLENGED WITH PERSISTENT LABOR COST PRESSURES

CALENDAR QUARTER BY QUARTER CHANGE

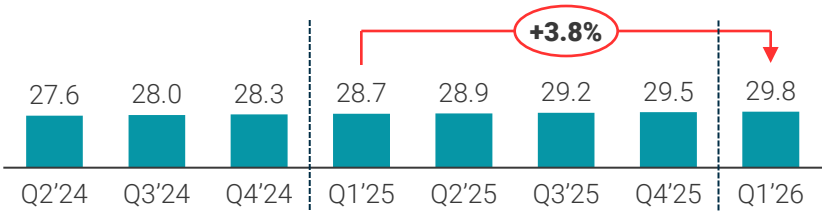
Total manufacturing employees, *M*



Total manufacturing job openings, *K*

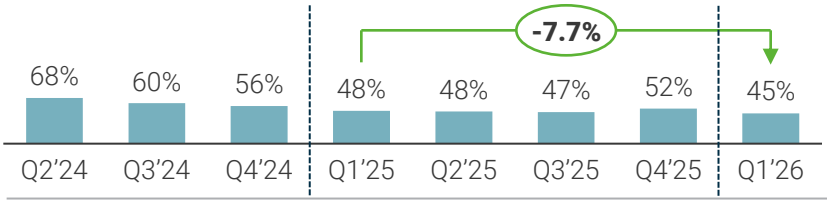


Manufacturing hourly wage rates, *$/hr*



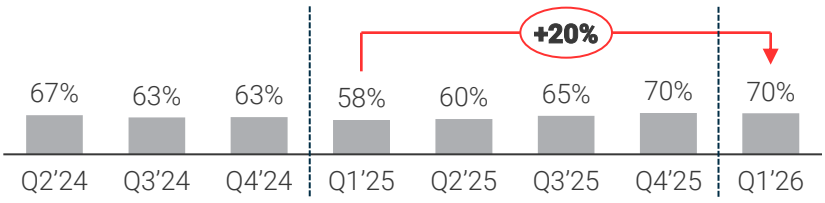
Attracting & Retaining Workforce

% of survey respondents agreeing with the assertion is a concern



Rising Healthcare/Insurance Costs

% of survey respondents agreeing with the assertion is a concern



HIGHLIGHTS

- Manufacturing headcount is quietly contracting, reflecting a wait-and see approach to labor planning.
- The gradual decline suggests manufacturers are optimizing existing workforces rather than signaling distress.

- Hiring demand remains low compared with the highs of 2024, but remains active, indicating a selective rather than frozen labor market.
- Manufacturers are filling gaps strategically, prioritizing critical roles over broad-based recruitment.

- Wages continue to climb with no sign of plateauing, keeping labor cost pressure firmly in place.
- The sustained upward trend reflects a structural shortage of skilled manufacturing talent, not a cyclical spike.

- Retention concerns have eased from prior highs but remain a live issue, particularly for specialized roles.
- The persistent challenge signals that competitive compensation alone is not enough to secure the workforce manufacturers need.

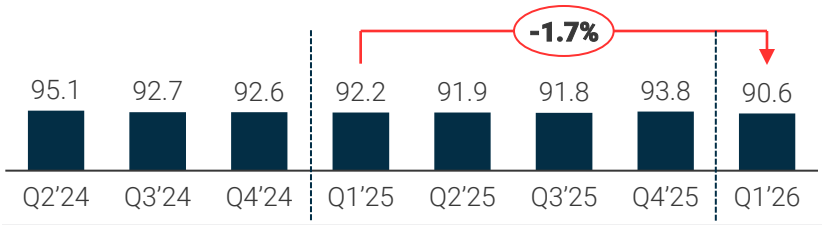
- Benefits costs are accelerating, adding a compounding layer of cost pressure beyond wages alone.
- For small and mid-sized manufacturers, rising healthcare expenses are becoming a meaningful drag on margins.

MACRO KPI (GERMANY) - PRODUCTION AND CAPACITY

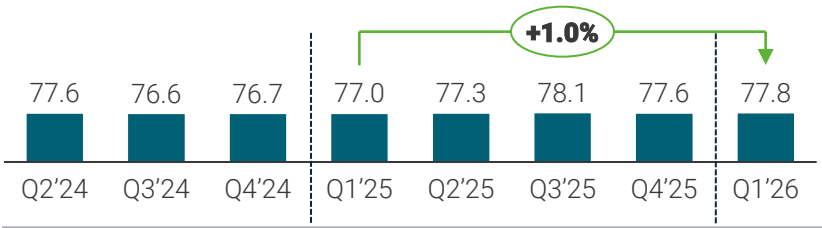
GERMAN MANUFACTURING SAW INCREASED EXPORTS AND UTILIZATION AMID IMPROVED SENTIMENT

CALENDAR QUARTER BY QUARTER CHANGE

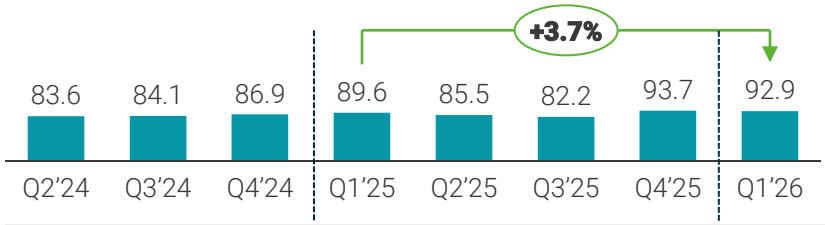
Manufacturing production *(indexed to 2021 production)*



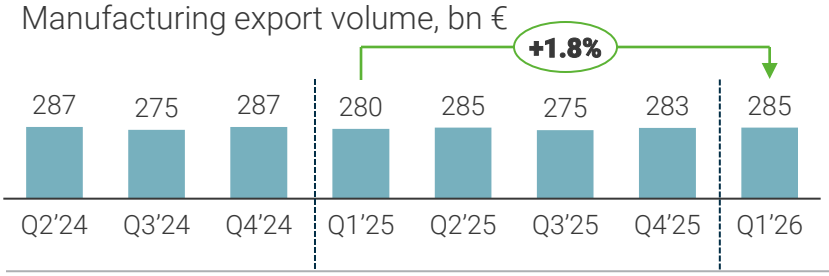
Manufacturing capacity utilization, %



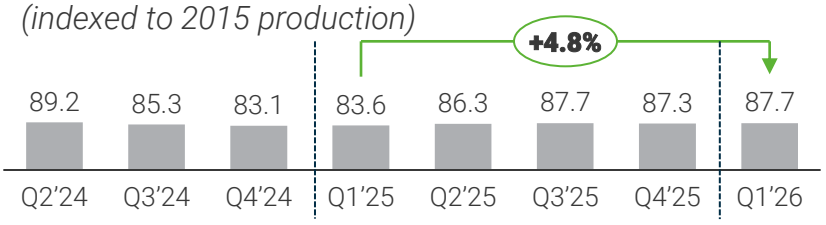
Manufacturing new orders *(indexed to 2021 production)*



Manufacturing export volume, bn €



Manufacturing IFO business climate *(indexed to 2015 production)*



HIGHLIGHTS

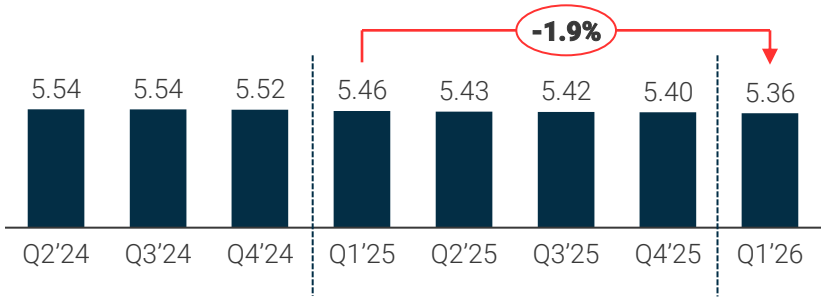
- Despite gross value creation spike in Q4'25, production continues to trend downward YoY.
- German manufactures need to continue to transform their companies towards higher efficiency.
- Utilization of German factories has improved slightly YoY.
- Improving utilization remains a key lever to boost profitability for German manufacturers.
- New orders remain high in Q1'26 despite slight decline from end of 2025.
- The boom in defense spend remains a key driver.
- Export volume continues to see a positive trend.
- The Iranian War did not negatively impact Germany's export.
- IFO index increased YoY with slight uptick from Q4'25 showing continued sentiment improvement.
- Despite continued increase, the Iranian War led to a considerable dip in March, displaying varied levels of sensitivity as geopolitical conflicts remain the new normal.

MACRO KPI (GERMANY) - LABOR

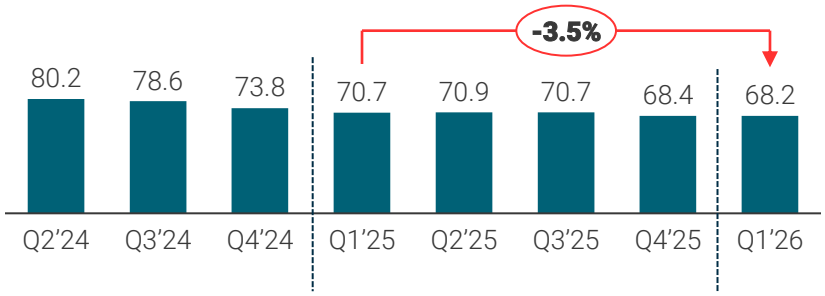
GERMAN MANUFACTURING MARKET REMAINS TIGHT AS PRODUCTIVITY PER HOUR GAINS

CALENDAR QUARTER BY QUARTER CHANGE

Total manufacturing jobs, M

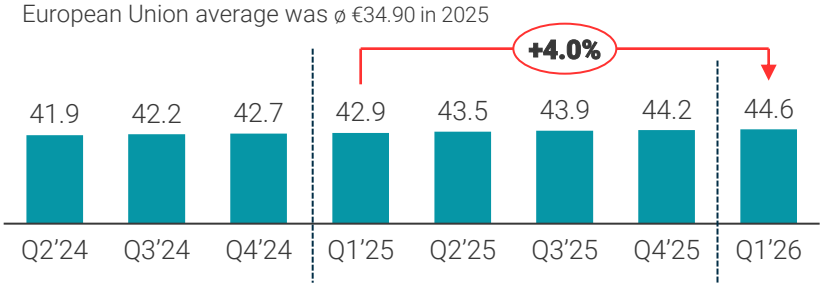


Total manufacturing job openings, K

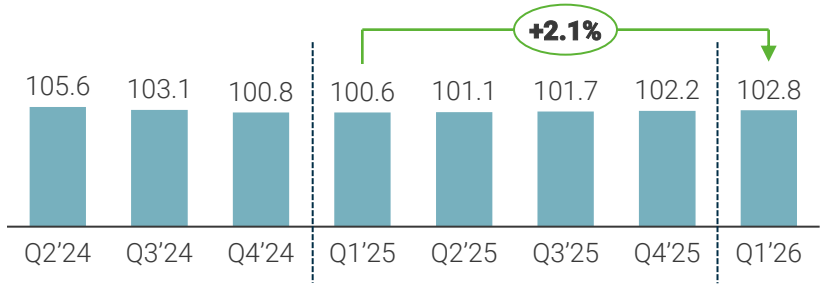


Manufacturing hourly wage rates (12-month view), €/hr

European Union average was ø €34.90 in 2025



Productivity per hour *(indexed to 2020 production)*



HIGHLIGHTS

- Headcount continued to steadily decline in Q1'26 .
- High costs, high bureaucracy, and low manufacturing production remain key drivers for the reduction in jobs.

- YoY decline in job openings signifies continued tightening of the market.
- Downsizing of companies is typically in sync with hiring freezes.

- Wages continue to increase YoY and QoQ.
- Germany's hourly wages are the 5th highest in the European Union.

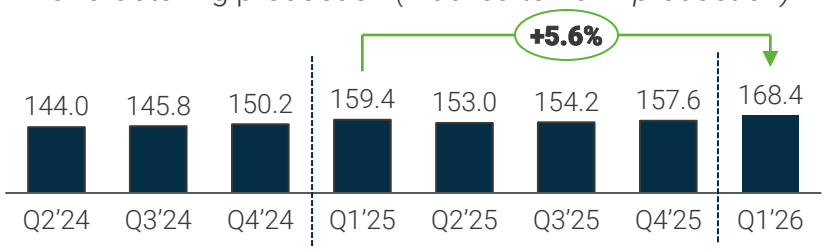
- Productivity per hour improved YoY with slight increase from Q4'25.
- Wage increases continue to outweigh productivity improvements per hour with automation tools and AI seen as levers to boost productivity and competitiveness.

MACRO KPI (CHINA) - PRODUCTION AND CAPACITY

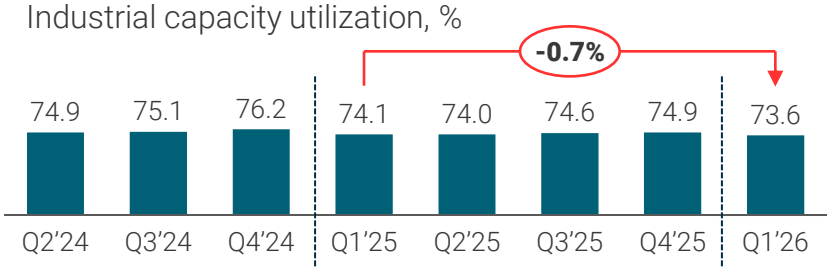
CHINESE MANUFACTURING EXPERIENCES UNEVEN GROWTH DRIVEN BY AUTO AND ADVANCED SECTORS

CALENDAR QUARTER BY QUARTER CHANGE

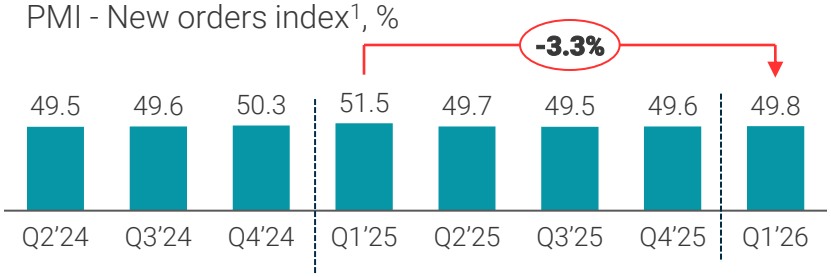
Manufacturing production *(Indexed to 2017 production)*



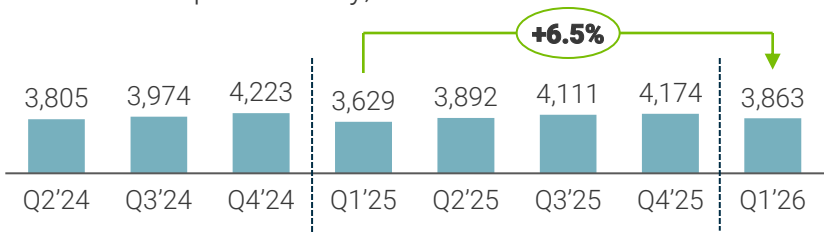
Industrial capacity utilization, %



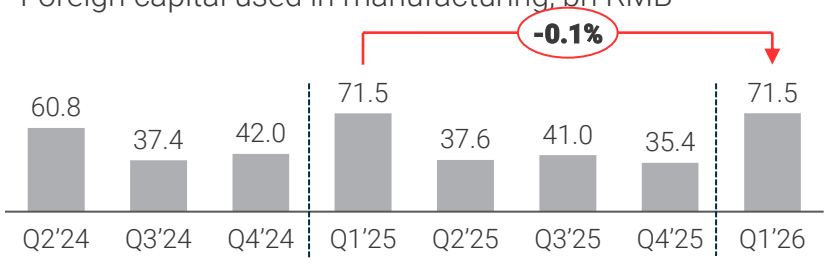
PMI - New orders index[1], %



Industrial export delivery, bn RMB



Foreign capital used in manufacturing, bn RMB



HIGHLIGHTS

- Manufacturing production continues to increase YoY with industry sector growth remaining uneven.
- Production is largely driven by high-tech manufacturing, with 3D printing equipment, lithium batteries, and industrial robots leading the expansion.
- Capacity utilization remains low YoY with a drop from Q4'25.
- The construction material industry faced the largest decline indicating continued decline in demand for real estate.
- PMI is below 50%, driven by Chinese New Year holiday impact in Jan/Feb.
- PMI rebounded to 51.6% in March, signaling solid domestic demand recovery moving forward in 2026.
- Industrial export delivery rose YoY, with growth concentrated in rail, automotive, ocean, aerospace, electrical equipment, and electronics, collectively accounting for over 75% of the gain.
- QoQ decline tied to Chinese New Year holiday in Jan/Feb.
- Foreign direct investment remains flat and increasingly concentrated in high-tech industries, with investment nearly doubling YoY.
- Semiconductors, high-end equipment, and R&D centers represent the principal areas of inflow.

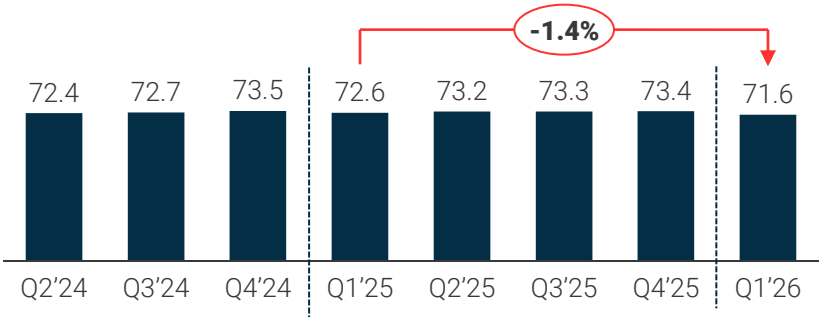
1. Relative to 50 (e.g. if 50 there is no change)

MACRO KPI (CHINA) - LABOR

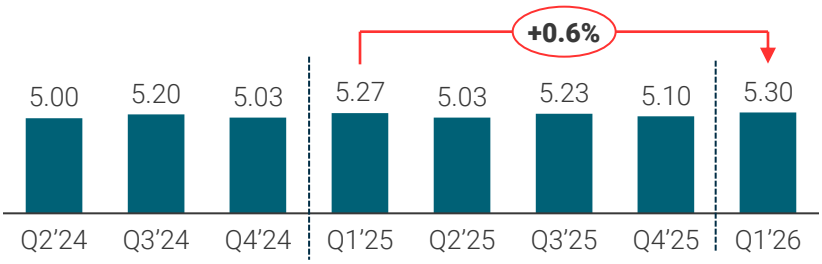
CHINESE MANUFACTURING HEADCOUNT CONTINUES TO DECLINE WHILE LABOR PRODUCTIVITY INCREASES

CALENDAR QUARTER BY QUARTER CHANGE

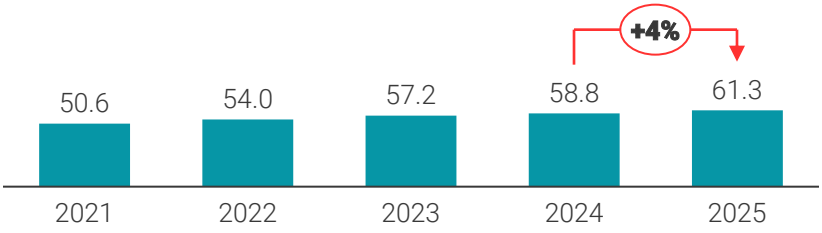
Total industrial employees, *M*



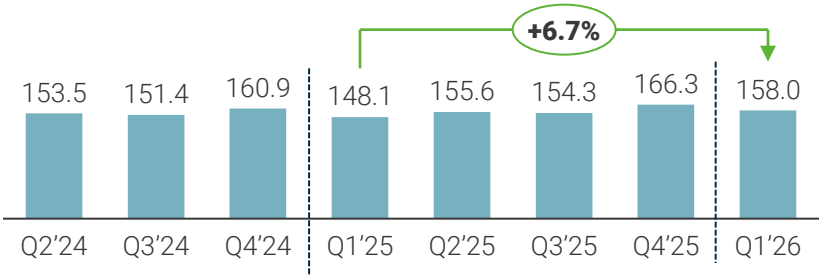
Registered unemployed rate in urban areas, %



Hourly wage[1] rate in urban, non-private units, RMB/hour



Labor productivity (*Indexed to 2020*)



HIGHLIGHTS

- Q1'26 employment rate decreased QoQ, largely due to seasonal impact of the Chinese New Year in Jan/Feb.
- Overall productivity gains driven by automation and efficiency improvement led to decline YoY in employee count.

- In Q1'26, urban unemployment increased slightly due to festival effects
- The labor market remains generally stable with slight variations QoQ as economic uncertainty limits labor market growth.

- Manufacturing wages continued to be on the upward trend, outpacing the increase from 2023 to 2024.
- In 2026 the wage rate is expected to continue to increase, but the pace of increase is expected to decline.

- Productivity improved YOY, as China remains competitive through productivity enhancements.
- The productivity gains were driven by automation, digitalization, and industrial upgrades nation-wide.

1.Hourly wage of urban state-owned & foreign invested companies (whose social benefits and bonuses are better than private units), inflation factor not considered

TOPIC HIGHLIGHT

READ THE PLANT BEFORE THE P&L: CATCHING STRESS EARLY IN MANUFACTURING CREDITS

After a year of tariff and cost headlines, it comes as no surprise that manufacturers are under pressure, but the headline figures are still confronting. In China, official factory activity PMI dropped back into contraction at 49.0 in April 2025 — its weakest reading in 16 months — and by October, shipments to the U.S. were more than 25% lower than a year earlier.

In any portfolio, lenders will naturally prioritize borrowers who show obvious signs of stress. But the sharpest losses come from exposures that are harder to spot: manufacturers that still look healthy on the surface, but with revenue built on yesterday's pricing, yesterday's volumes, and shrinking economics on the factory floor.

Lenders across Asia are already watching their manufacturing books closely. However, avoiding being blindsided by those "healthy" exposures isn't a question of more financial analysis; the key is tuning into the right warning signals at the plant. Among which, **three should be top of mind during every factory visit:**

Red flag #1: Busy factory, disappearing margins?	A running line and moving trucks are a first impression, not a diagnosis. Pressure-test three areas: • Shifts: How has the shift pattern changed vs. a year ago and vs. peers? • Customers & terms: Which major customers are on the lines, and on what payment/pricing terms? • Inventory & tariffs: How do finished-goods levels compare to the order book, and how have tariffs reshaped unit economics?
Red flag #2: Trade finance looks great—until volumes fall	Exporters stack multiple working-capital facilities that look healthy in good times. The fragility shows when volumes fall and available trade finance shrinks with them. Press management on: If the order pipeline dropped 20% tomorrow, how would you fund the unwinding of trade and supply-chain finance — and how much of that funding is committed rather than discretionary?
Red flag #3: "It'll bounce back" as core plan	Stressed performance often isn't a steady slide but a dip-then-plateau, which management labels a temporary cyclical effect. That's a risky assumption — tariffs, sourcing shifts, and changing demand can turn "cyclical" into structural. Test it: Using operational and cash data, can management show which parts of the business are genuinely value-generating on a fully loaded basis, and which are now structurally challenged?

Conclusion: *The operational intelligence matters equally to anyone running or overseeing a manufacturing business, not just for lenders. The same signals that alert a lender to stress are the signals an operations leader should be tracking as a matter of routine.*

Build the habit of reading your plant before your P&L. Track shift utilization against peers. Model your working-capital structure under a volume stress scenario. And when leadership frames a sustained performance decline as "cyclical", demand the data that supports that conclusion — or begin planning for the alternative.

— AlixPartners Asia TRS team

Source – AlixPartners Asia TRS team: Read the plant before the P&L: Catching stress early in manufacturing credits

AlixPartners has core competencies across the value chain including planning, sourcing, manufacturing, logistics and sales & marketing

Sample areas of AlixPartners capabilities across industries

MANUFACTURING

- Digitalization
- Shop floor productivity improvement (e.g., OEE, CI)
- Automation/Smart Factory
- Manufacturing footprint optimization
- Plant closure/(re)open
- Co-pack/co-man cost optimization
- Manufacturing strategy, make/buy

MARKETING/ INNOVATION

- Marketing mix, effectiveness
- Digital, B2B, DTC, eCommerce
- New Product Development/innovation
- Portfolio management/SKU rationalization
- Category management
- Customer and product profitability optimization
- Trade spend optimization
- Brand management
- Design to value

PLANNING

- S&OP/IBP
- Demand planning/forecasting
- Supply planning
- Digital strategy
- Order management
- SC operating model

SOURCING

- Strategic sourcing (direct/indirect)
- Procurement excellence
- Supply risk management and resilience
- Supplier relationship
- Commodity price management
- Tariff Mitigation/Task Force

SALES

- New market entry, route-to-market model
- Omni-channel strategy
- Sales force effectiveness (own, distributor)
- Commercial excellence
- Pricing effectiveness
- Customer service

LOGISTICS

- Transportation management (inbound, middle/last mile, load efficiency, fleet)
- Warehouse & fulfillment improvement (e.g., DC productivity, load optimization, service level improvement)
- Distribution network planning/footprint optimization
- Supply chain sourcing (e.g., 3PL eval, contracting, cost assessment)
- Inventory optimization

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DATA SOURCES GLOBAL & USA

KPI	Source
% of Companies that beat market EBITDA estimates	Publicly available Financial filings of Top 40 Companies via S&P Capital IQ Calculation: Quarterly results taken
Revenue	Publicly available Financial filings of Top 40 Companies via S&P Capital IQ Calculation: Quarterly results taken
Gross Margin	Publicly available Financial filings of Top 40 Companies via S&P Capital IQ Calculation: Quarterly results taken
Inventory Turnover	Publicly available Financial filings of Top 40 Companies via S&P Capital IQ Calculation: Quarterly results taken
Manufacturing production, index	Federal Reserve Bank of St. Louis Calculation: Quarterly results taken
Manufacturing capacity utilization, %	Federal Reserve Bank of St. Louis Calculation: Quarterly results taken
Manufacturer's New orders, *$B*	United States Census Bureau Manufacturers' Shipments, Inventories, and Orders, Seasonally Adjusted Calculation: Quarterly results taken
Private fixed investment, *$B*	Federal Reserve Bank of St. Louis Calculation: Quarterly results taken
Unfavorable business climate, % concerned	National Association of Manufacturers – NAM Manufacturers' Outlook Survey Calculation: Quarterly results taken
Total manufacturing employees, *M*	Federal Reserve Bank of St. Louis Calculation: Quarterly results taken
Total manufacturing job openings, *K*	Federal Reserve Bank of St. Louis Calculation: Quarterly results taken
Manufacturing hourly wage rates, *$/hr*	Federal Reserve Bank of St. Louis Calculation: Quarterly results taken
Attracting & Retaining Workforce, % concerned	National Association of Manufacturers – NAM Manufacturers' Outlook Survey Calculation: Quarterly results taken
Rising Healthcare/Insurance Costs, % concerned	National Association of Manufacturers – NAM Manufacturers' Outlook Survey Calculation: Quarterly results taken

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DATA SOURCES GERMANY

KPI	Source
Manufacturing production, index	Statistisches Bundesamt: Code: 42153-0001 Produktionsindex für das Verarbeitende Gewerbe: Deutschland, Monate, Original- und bereinigte Daten, Wirtschaftszweige (Hauptgruppen und Aggregate) Calculation: Average over the three month in the quarter
Manufacturing capacity utilization, %	ifo Institut: Ifo Konjunkturperspectiven x/202x Calculation: Quarterly results taken
Manufacturing new orders, index	Statistisches Bundesamt: Code: 42151-0004 Auftragseingang im Verarbeitenden Gewerbe (Volumenindex): Deutschland, Monate, Original- und bereinigte Daten, Absatzrichtung, Wirtschaftszweige (Hauptgr. und Aggregate) Calculation: Average over the three month in the quarter
Manufacturing Ifo business climate, index	Ifo Institute: Verarbeitendes Gewerbe Calculation: Geschäftsklima = ((Lage+200)(Erwartungen+200))^0.5-200 Calculation: Index= (Saldo im Berichtsmonat +200)/(Durschnittlicher Saldo im Basisjahr +200)*100 (Reference year is 2015)
Manufacturing export volume, bn€	Statistisches Bundesamt: Code: 42111-0002 Beschäftigte und Umsatz der Betriebe im Verarbeitenden Gewerbe: Deutschland, Monate, Wirtschaftszweige (WZ2008 Hauptgruppen und Aggregate) Calculation: Sum over the three month in the quarter
Total manufacturing jobs, M	Statistisches Bundesamt: Code: 42111-0002 Beschäftigte und Umsatz der Betriebe im Verarbeitenden Gewerbe: Deutschland, Monate, Wirtschaftszweige (WZ2008 Hauptgruppen und Aggregate) Calculation: Average over the three month in the quarter
Total manufacturing job openings, K	Bundesagentur für Arbeit: Gemeldete Arbeitsstellen nach Wirtschaftszweigen - Deutschland, West/Ost und Länder (Monatszahlen) Calculation: Average over the three month in the quarter
Manufacturing hourly wage rates, €/hr	Statistisches Bundesamt: Code: 81000-0018 VGR des Bundes - Produktivität, Arbeitnehmerentgelt, Brutto- löhne u. -gehälter, Lohnstückkosten: Deutschland, Quartale, Original- und bereinigte Daten, Wirtschaftsbereiche Calculation: For each quarter, the average of the past 12 months was calculated
Average manufacturing hourly wage rates in Europe, €/hr	Statistisches Bundesamt: EU-Vergleich der Arbeitskosten je geleistete Stunde 2025 im Produzierenden Gewebe und Dienstleistungsbereich (ohne WZ O) in EUR
Productivity per hour, #	Statistisches Bundesamt: Code: 81000-0018 VGR des Bundes - Produktivität, Arbeitnehmerentgelt, Brutto- löhne u. -gehälter, Lohnstückkosten: Deutschland, Quartale, Original- und bereinigte Daten, Wirtschaftsbereiche Calculation: For each quarter, the average of the past 12 months was calculated

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DATA SOURCES CHINA

KPI	Source
Manufacturing production (Value-added of Industry)	National Bureau of Statistics of China Calculation: Using industrial value added as the base for manufacturing production. Set March 2017 as the index base (100). Monthly year-on-year growth rates are then used to calculate the March 2018 index, which is subsequently used to back-calculate the indices for April–December 2017. This process is repeated to derive monthly industrial value-added indices from 2018 through 2025.
Industrial capacity Utilization %	National Bureau of Statistics of China Calculation: Quarterly results taken
PMI - New orders index %	National Bureau of Statistics of China Calculation: Average over the three month in the quarter
Industrial Export Delivery, bn ¥	National Bureau of Statistics of China Calculation: Average over the three month in the quarter
Foreign capital used in manufacturing, bn ¥	National Ministry of Commerce of China Calculation: Use year-to-date foreign direct investment data and back-calculate quarterly totals from the monthly figures.
Total industrial employees, M	National Bureau of Statistics of China Calculation: Average over the three month in the quarter
Registered unemployed rate in urban areas, %	National Bureau of Statistics of China Calculation: Average over the three month in the quarter
Hourly wage rate in urban, non-private units, ¥/hour	National Bureau of Statistics of China Calculation: Dividing the annual average wage of urban non-private employees by 12 months, 22 working days per month and 8 hours per day.
Labor Productivity (Indexed to 2020)*	National Bureau of Statistics of China Calculation: Dividing the quarterly industrial value-added by the number of industrial employees to obtain per capita industrial value added. The 2020 Q1 value is set as the base year (index = 100) to derive the productivity index for 2020–2026.

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For more than 40 years, AlixPartners has helped businesses around the world respond quickly and decisively to their most critical challenges – circumstances as diverse as urgent performance improvement, accelerated transformation, complex restructuring and risk mitigation.

These are the moments when everything is on the line – a sudden shift in the market, an unexpected performance decline, a time-sensitive deal, a fork in-the-road decision. But it's not what we do that makes a difference, it's how we do it.

Tackling situations when time is of the essence is part of our DNA – so we adopt an action-oriented approach at all times. We work in small, highly qualified teams with specific industry and functional expertise, and we operate at pace, moving quickly from analysis to implementation. We stand shoulder to shoulder with our clients until the job is done, and only measure our success in terms of the results we deliver.

Our approach enables us to help our clients confront and overcome truly future-defining challenges. We partner with you to make the right decisions and take the right actions. And we are right by your side. When it really matters.