



World Fluid Power Summit

9 March 2017 Las Vegas

ISC International Statistics Committee

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CETOP Vice President

Presentation on behalf of the ISC Chairman Amadio Bolzani

ISC statistics programme

ISC DATA SOURCES
(National Home Sales /
Consumption)



ASSOCIATIONS

CETOP
USA
CHINA
INDIA
JAPAN
TAIWAN



ISC is conducting 3 sets of statistics:

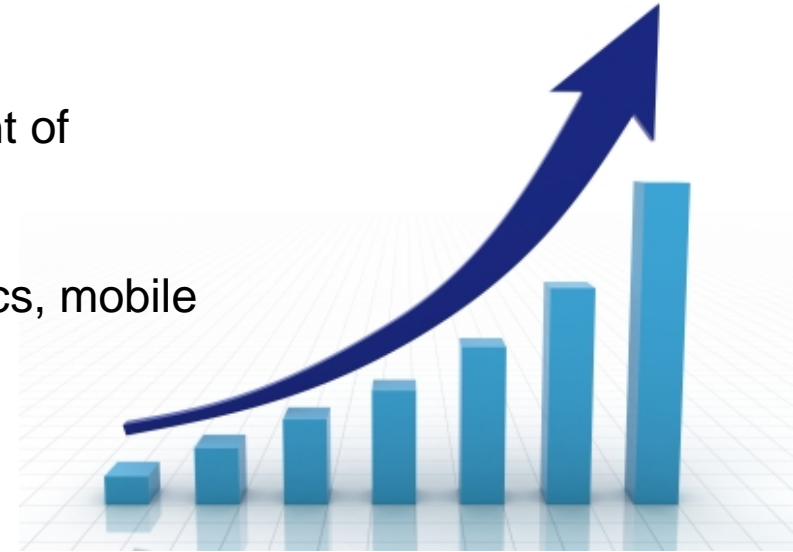
- Monthly Exchange on Tendencies
- Quarterly Trend Survey
- Annual Product Statistics

All this data is not available from any other source and is offered exclusively to the ISC member associations and their associated companies.

Monthly exchange on tendencies

ISC and CETOP cooperate in this exchange.
Member associations are asked for the development of

- Business climate
- National home sales in industrial hydraulics, mobile hydraulics and pneumatics as well as
- Orders in their country
- Order backlog and
- Expected business situation in the future.



FOCUS



SPEED IN REPLY

Quarterly Trend Survey

QUALITATIVE STATEMENTS



BUSINESS DATA FOR THE
CURRENT QUARTER
FORECAST FOR THE CURRENT
YEAR



The associations are asked for the development of

- National home sales and orders last year
- Percentage change of national home sales and orders in the current quarter
- expected change of national home sales and orders in the following quarter
- forecast for the current year and
- in the 3 and 4 quarter inquiry forecast for the next year
- trends in customer industries
- economic trends

ISC annual product statistics

WORLDWIDE data on individual product segments

FOCUS



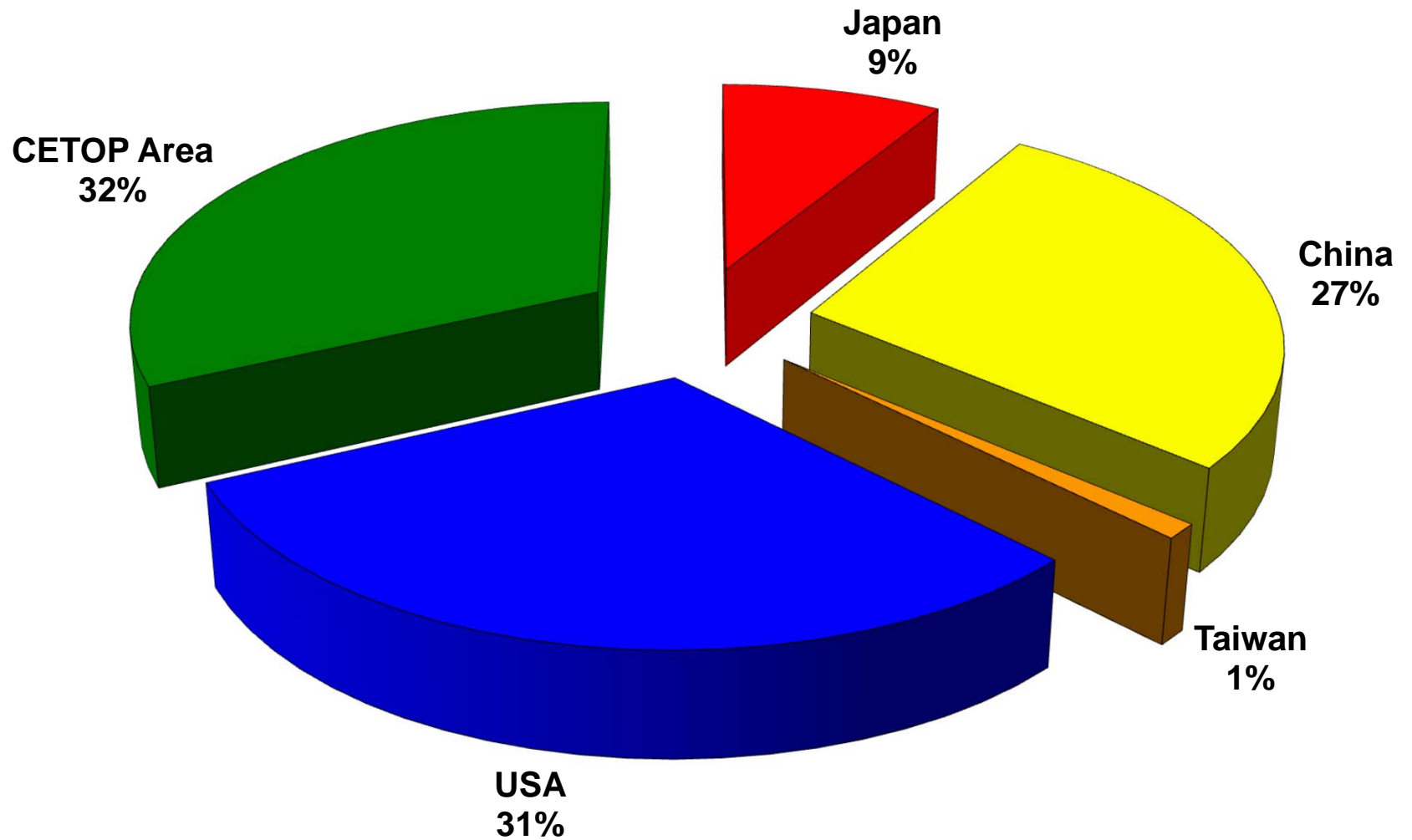
WHERE THE PRODUCT IS SOLD



National home markets for hydraulic and pneumatic products, e.g.:

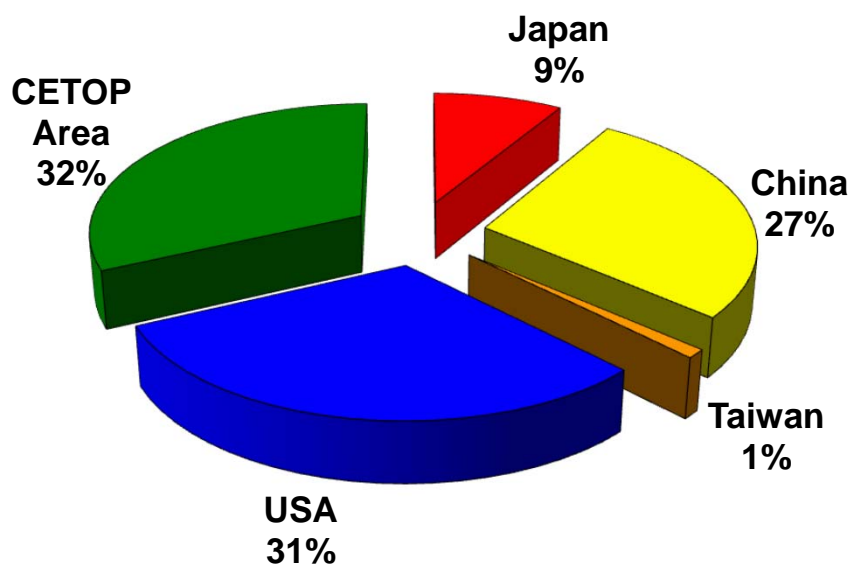
- Pumps
- Valves
- Actuators
- Filters / FRL
- Bulk connectors, bulk hose and assemblies
- etc.

Fluid Power Home Market (Estimated) 2016: 39,6 Billion Euro

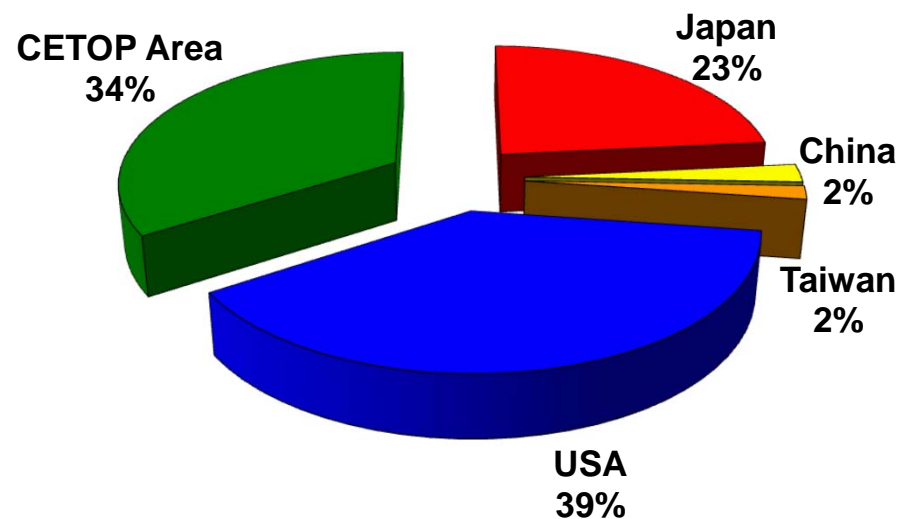


Fluid Power Home Market 2016 and 2000

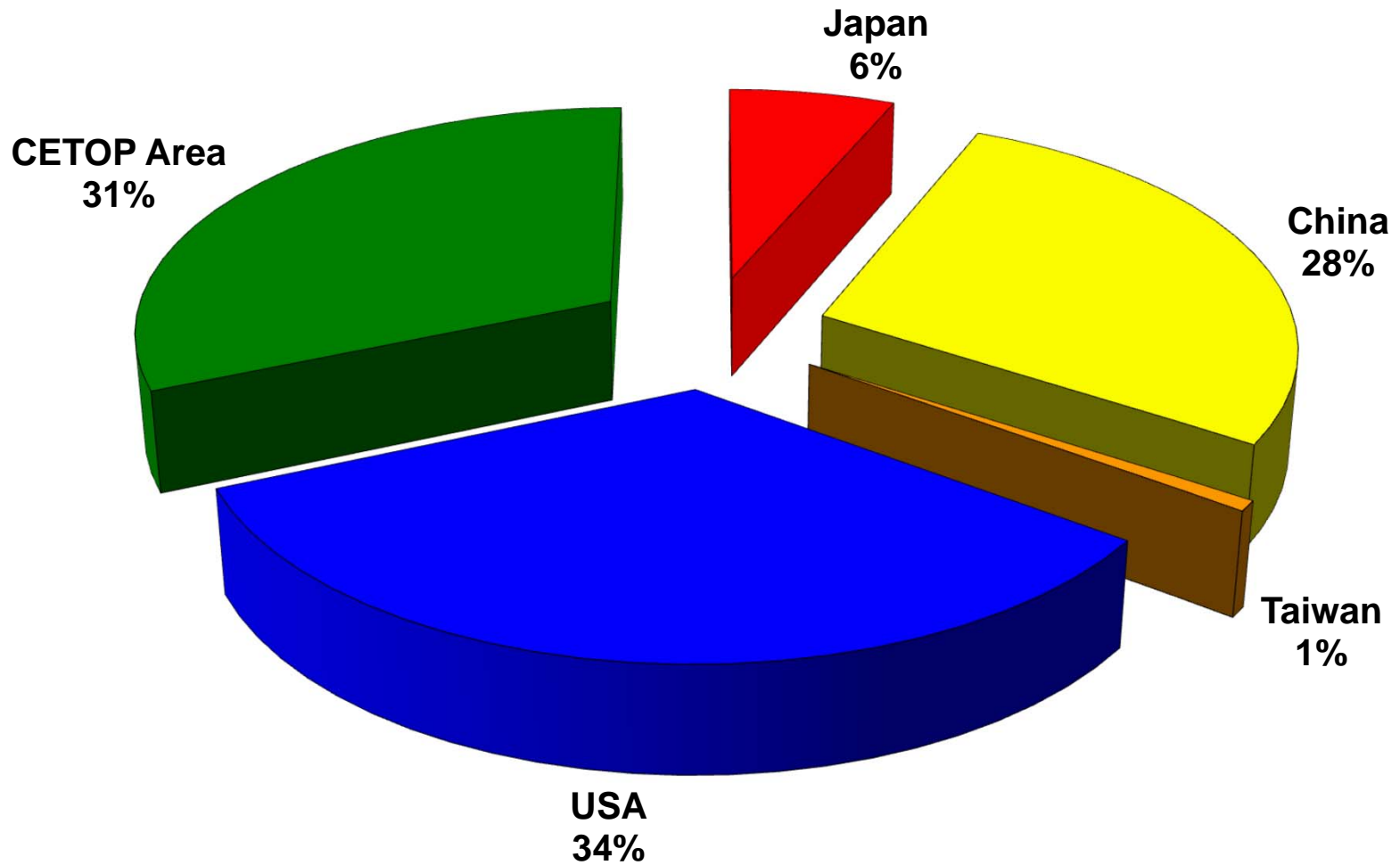
Fluid Power 2016
preliminary 39,6 Billion Euro



Fluid Power 2000
25,7 Billion Euro

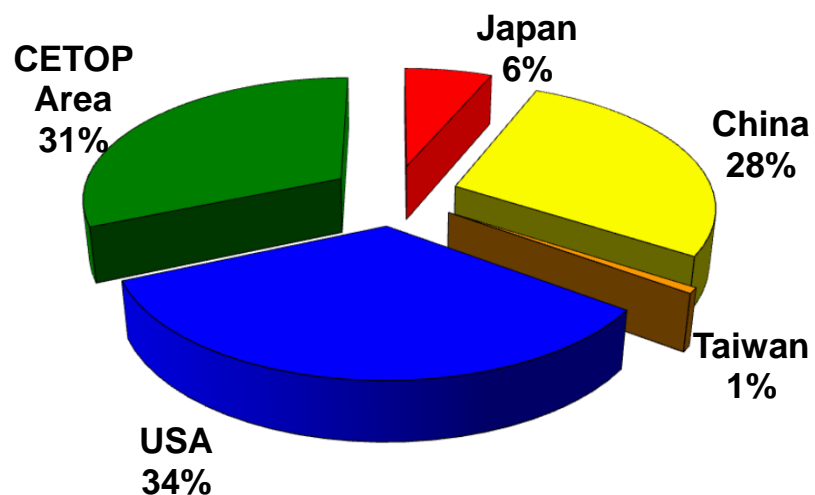


Hydraulics Home Market (Estimated) 2016: 28,2 Billion Euro

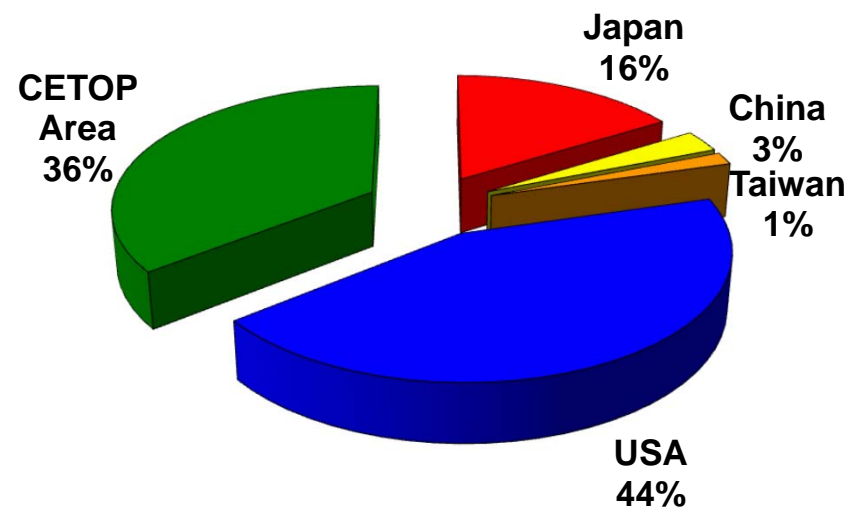


Hydraulics Home Market 2016 and 2000

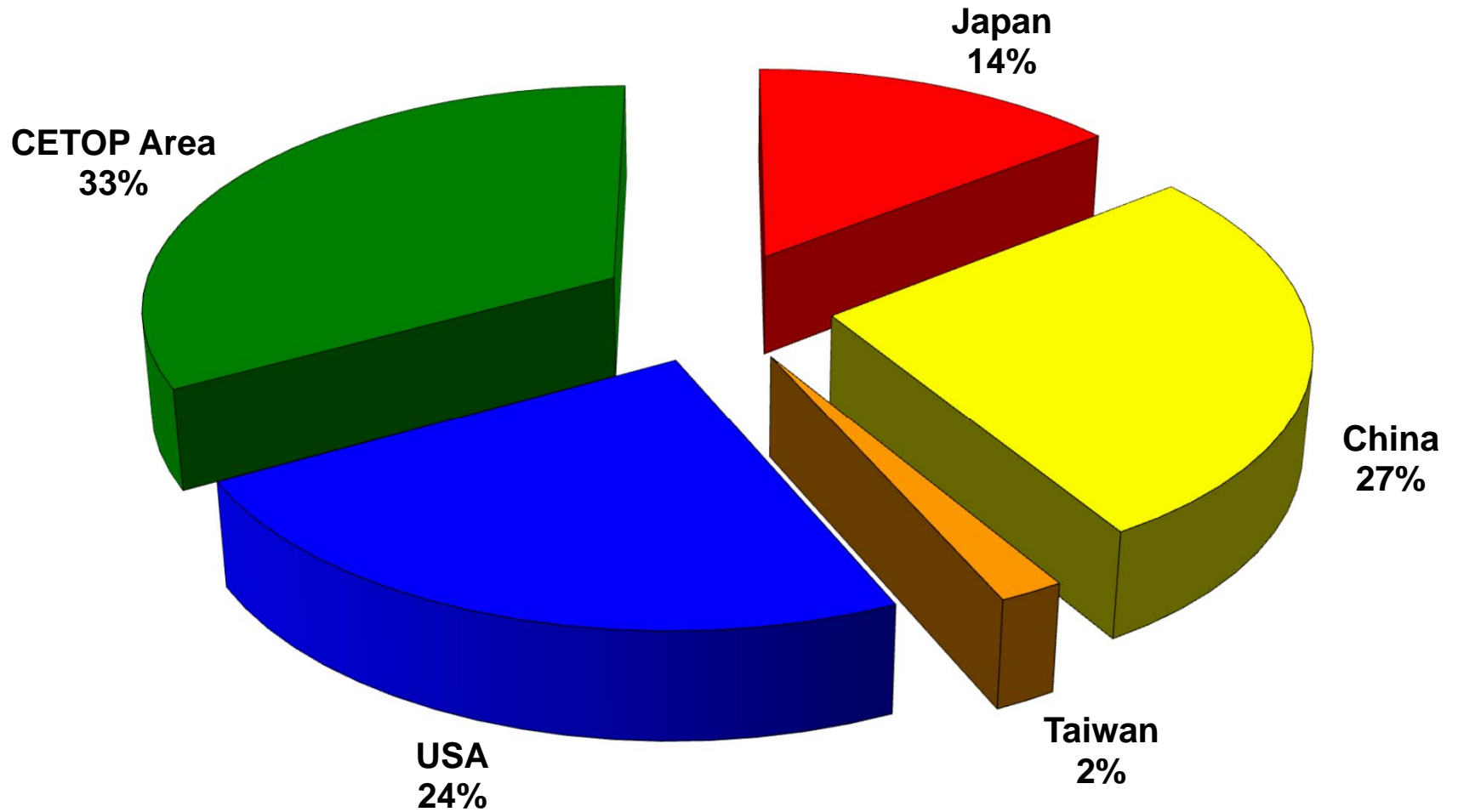
Hydraulics 2016
28,2 Billion Euro



Hydraulics 2000
17,0 Billion Euro

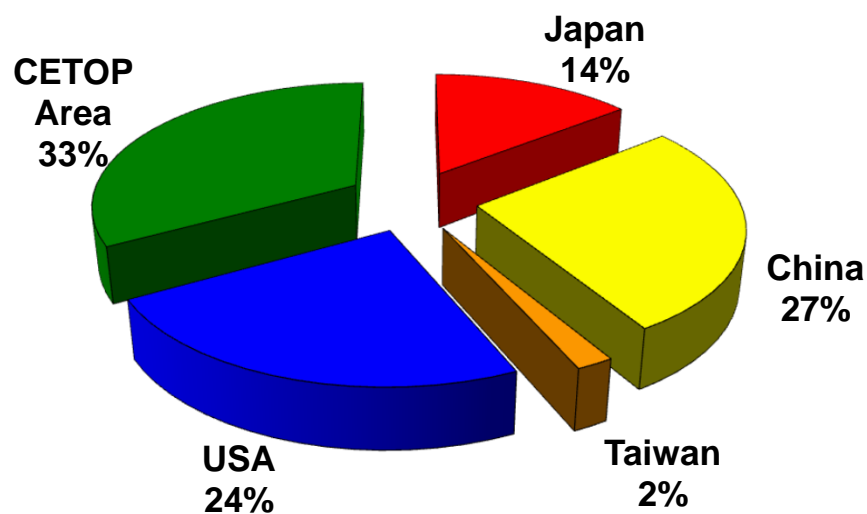


Pneumatics Home Market (Estimated) 2016: 11,4 Billion Euro

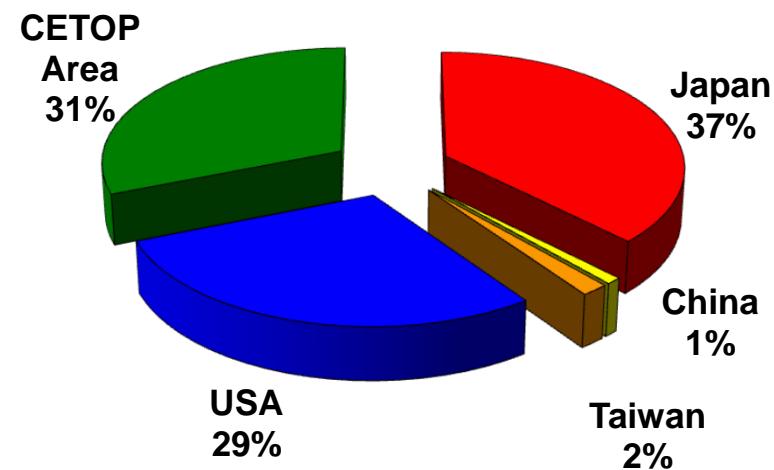


Pneumatics Home Market 2016 and 2000

Pneumatics 2016
11,4 Billion Euro

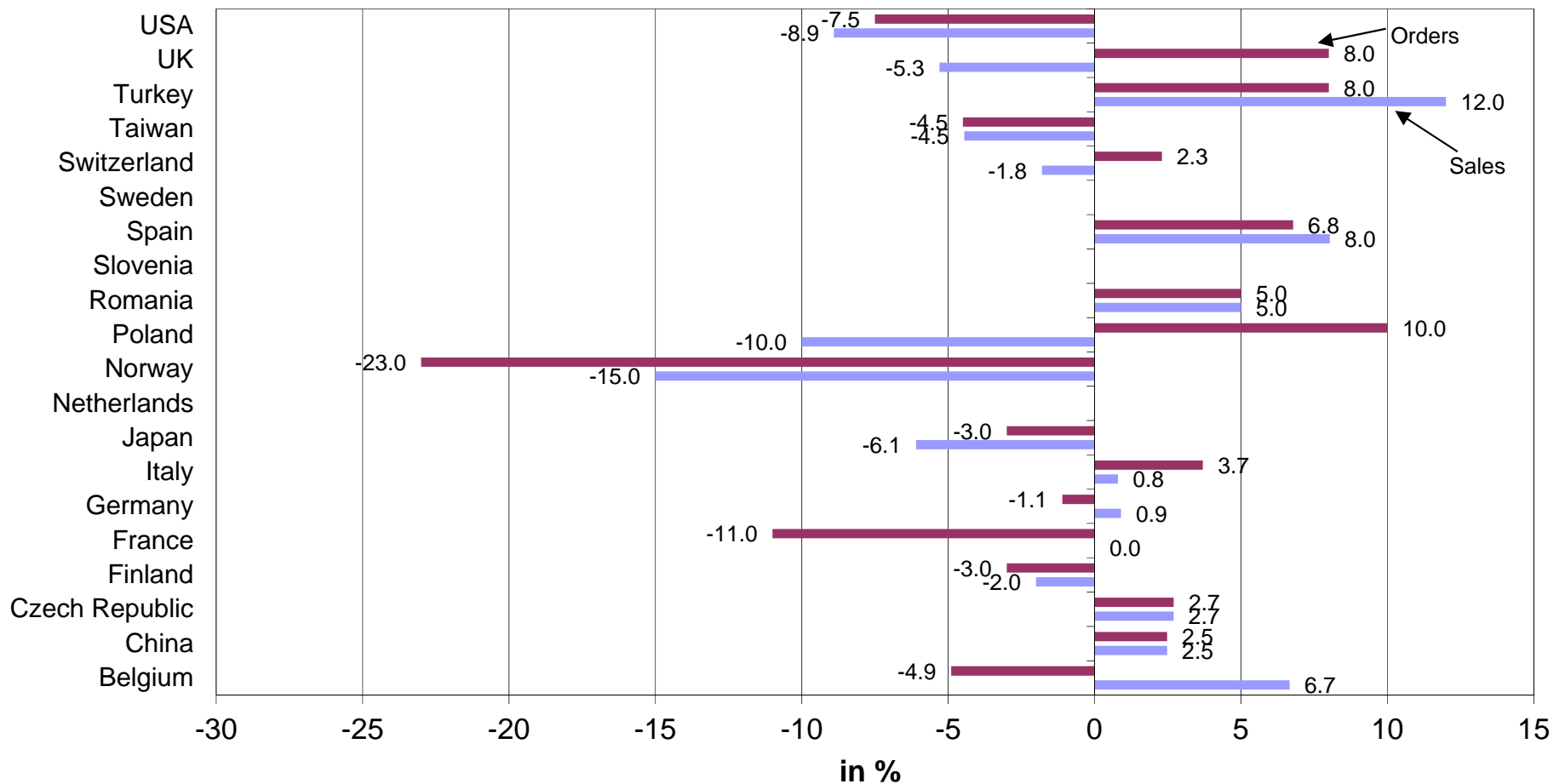


Pneumatics 2000
8,7 Billion Euro

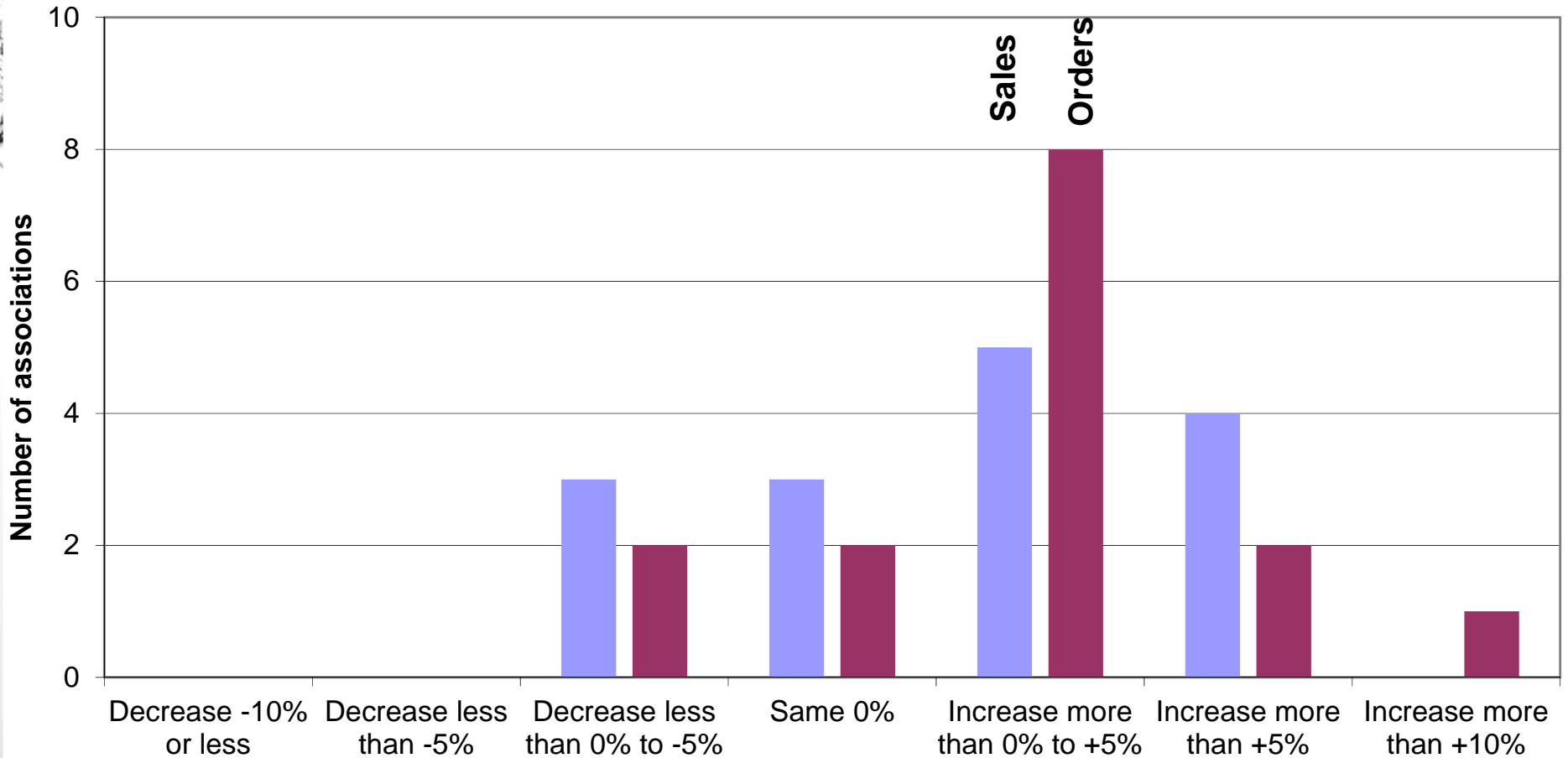


Hydraulics 2016 recorded trends

Hydraulics **Orders** and **Sales** Changes January-December 2016/January-December 2015 in %

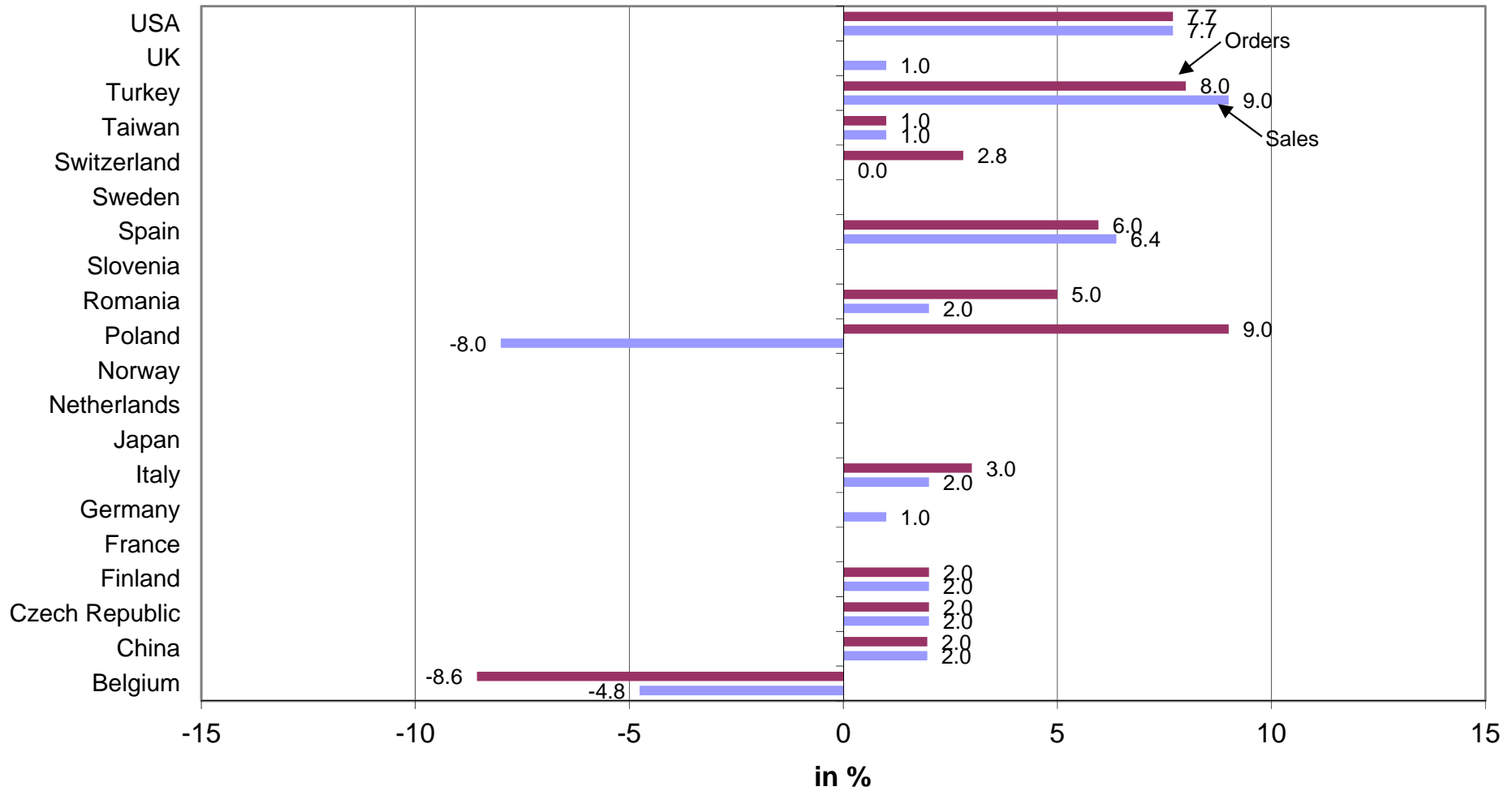


Hydraulics trends 1 Quarter 2017



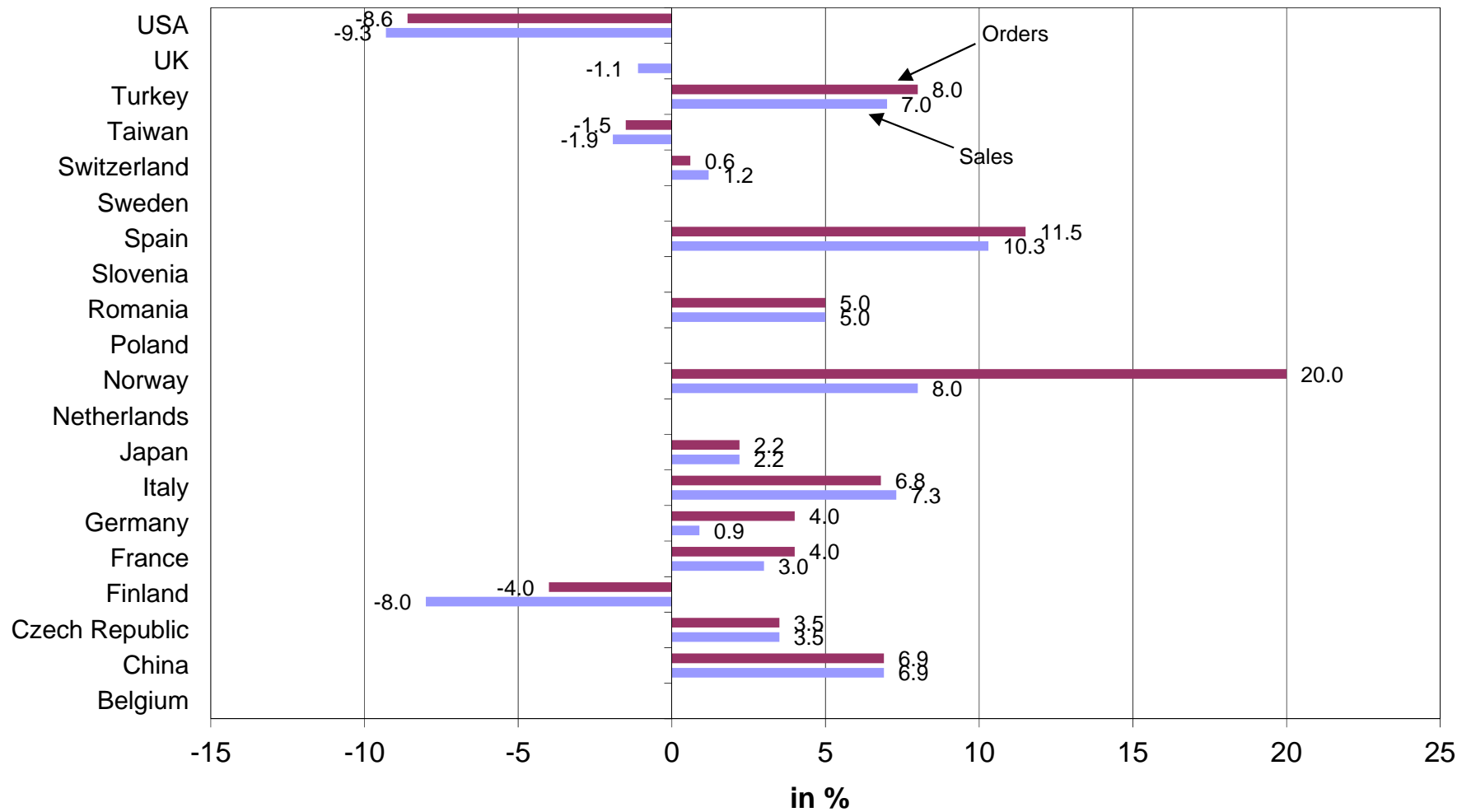
Hydraulics forecast 2017

Hydraulics Orders and Sales Forecast 2017/2016

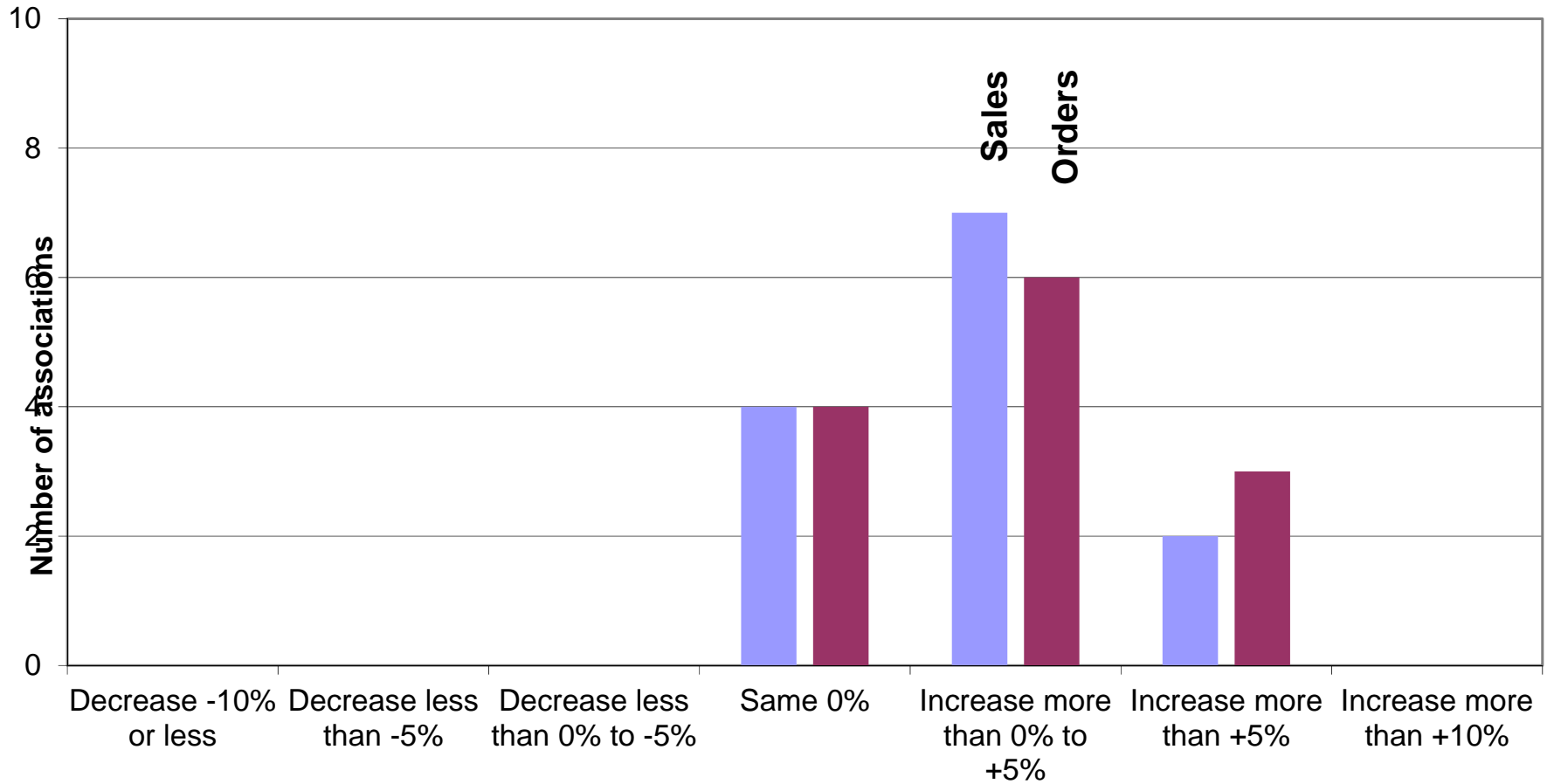


Pneumatics 2016 recorded trends

Pneumatics **Orders** and **Sales** Changes January-December 2016/January-December 2015 in %

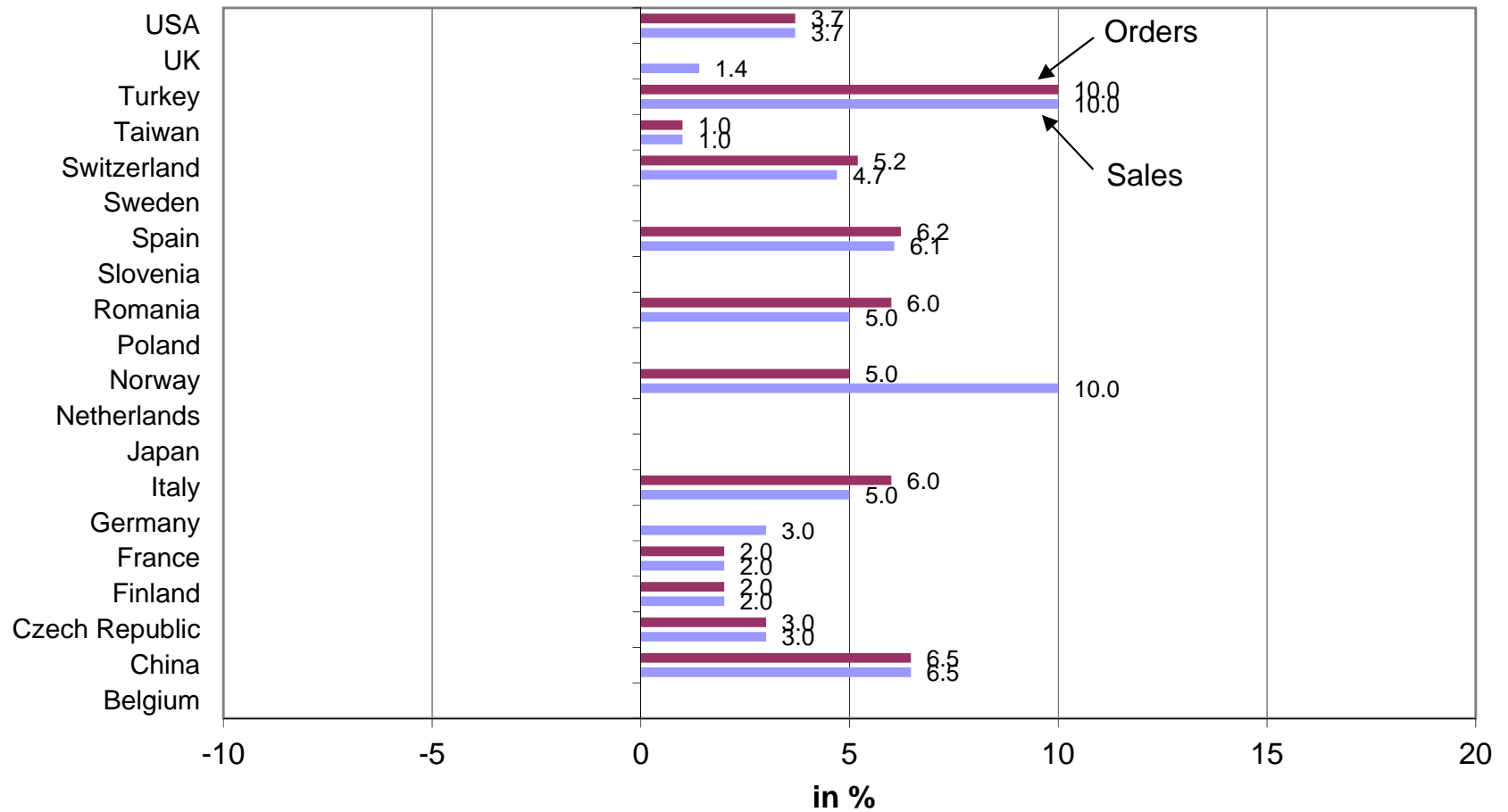


Pneumatics trends 1 Quarter 2017



Pneumatics forecast 2017

Pneumatics Orders and Sales Forecast 2017/2016



Efforts to enlarge ISC

It is agreed on the opportunity of enlarging the ISC by inviting the Fluid Power Associations of Australia, Brazil, Canada, Mexico, and South Africa to join our Committee, in order to have more complete figures of the worldwide Fluid Power market.

The ISC Secretariat is in contact with

- Australia: International Fluid Power Society of Australia
- Brazil: CSHPA (part of ABIMAQ)
- Canada: Canadian Fluid Power Association
- Mexico: Mexican Fluid Power Association
- South Africa: SAFPA

www.iscstats.org

The ISC web site has a public part and a members' only part.



PUBLIC AREA

- Who is ISC?
- ISC benefits
- List of associated associations with their web address and link
- Chairman and secretariat
- International Fluid Power Exhibitions and Conferences



RESTRICTED AREA (MEMBERS ONLY)

- Access by password
- Results of statistics: Quarterly Trend Survey, Annual Product Statistics,
- Summit presentations

Date and venue of the next ISC meeting



offers MDA Hanover 2017 as venue for the next ISC meeting. MDA Hanover will be on 24-28 April 2017.

**Wednesday, 26 April 2017, 12:30 to 15:30,
followed by the Economic Fluid Power meeting**



Thank you!