

CETOP: European Fluid Power Industry

World Fluid Power Summit

Las Vegas, 9 March 2017

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CETOP Vice President

Who is CETOP?

- CETOP is the European Fluid Power Committee.
- CETOP is the communication platform for fluid power in Europe.
- CETOP is the European umbrella organisation for nearly all national fluid power associations in Europe.
- Through the CETOP member associations, all well known companies in Europe belong to the Committee
- CETOP is cooperating with ISC – the International Statistics Committee.

Who is CETOP?

CETOP is representing:

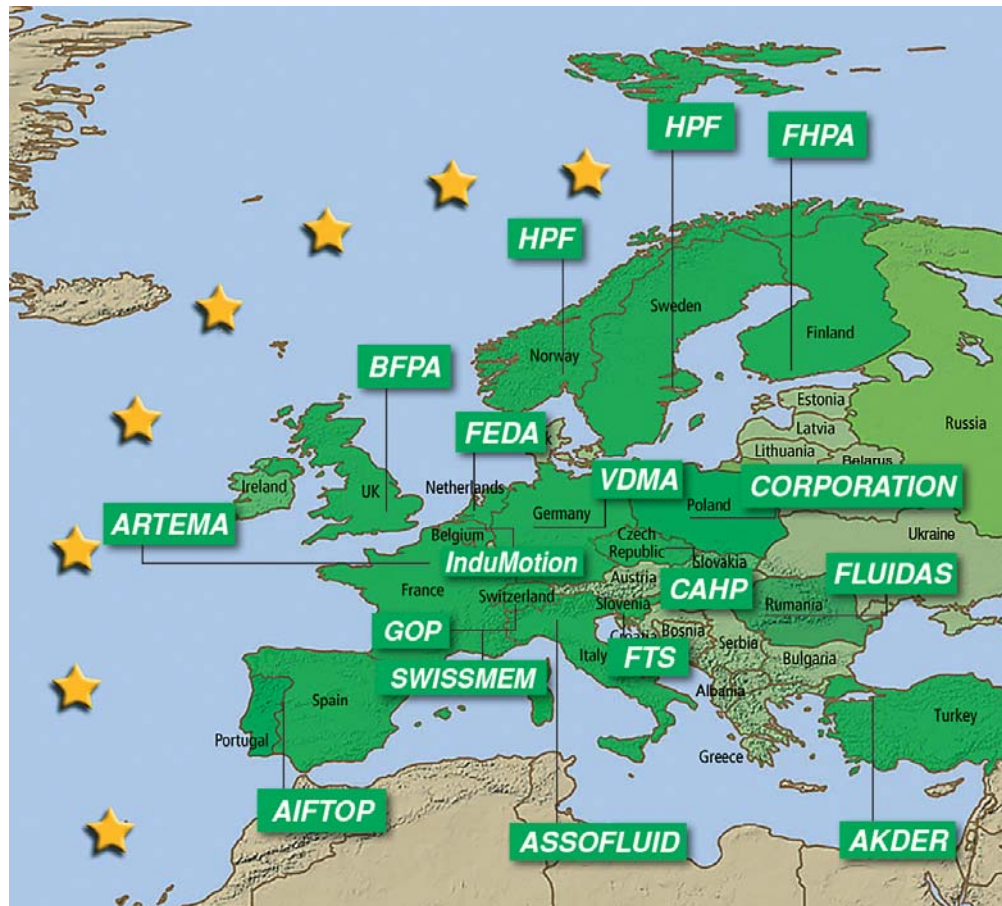
- 17 national Fluid Power Associations
- More than 1,000 companies – mainly manufacturers, but also some dealers
- Almost 70,000 employees
- A market value of about 13 billion Euro
- These account for a very high proportion of companies active in these fields – 80%-90% in most European countries

What is CETOP doing?

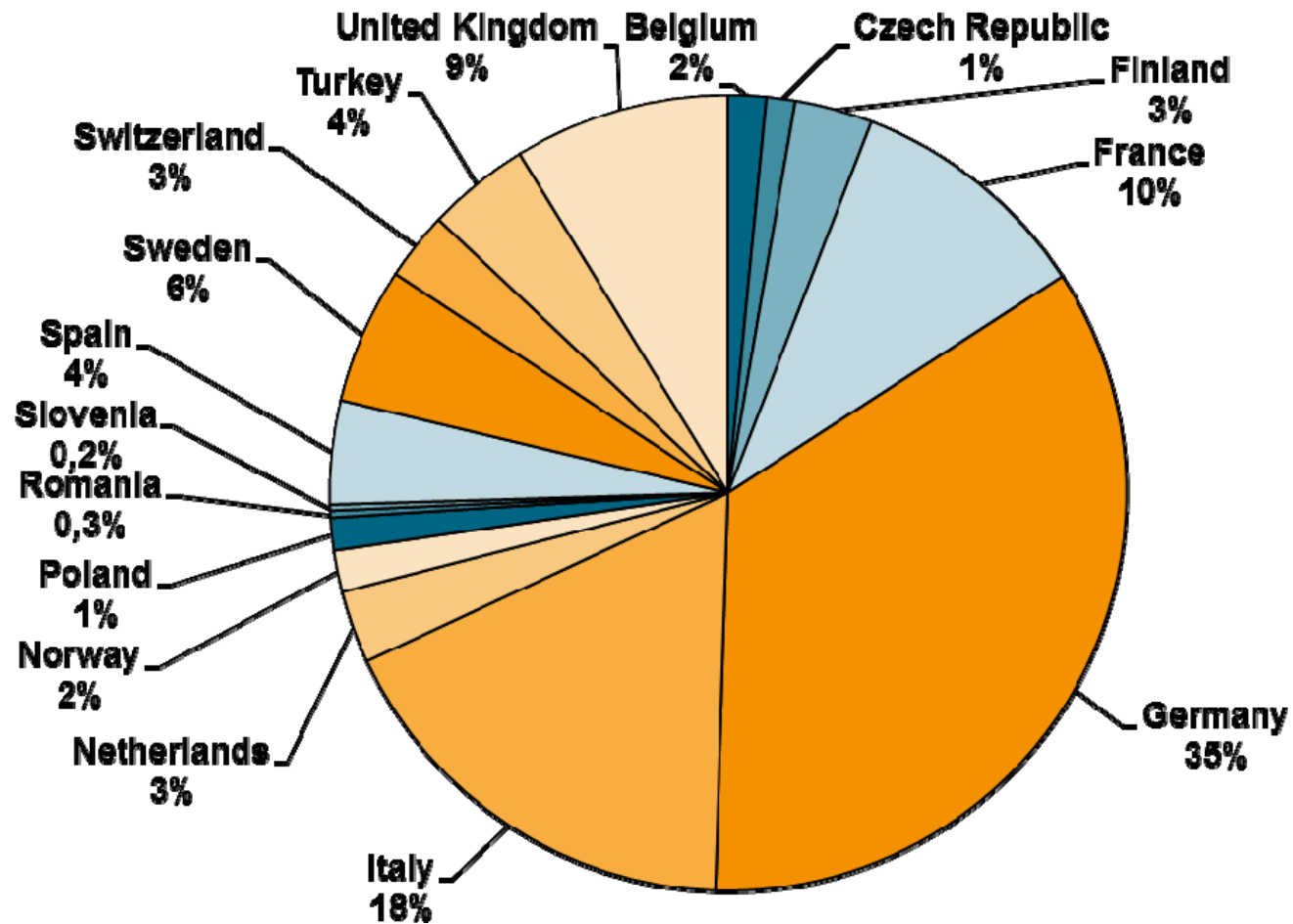
CETOP fields of activities are, e.g. :

- Economics: Statistics on the European fluid power industry
- Marketing and Communication: CETOP Directory – the European fluid power buyer’s guide, available on www.cetop.org
- Technics: Position Papers related to European Directives
- Education: Harmonised pan-European requirement profiles for particular qualification levels.
- And much more....

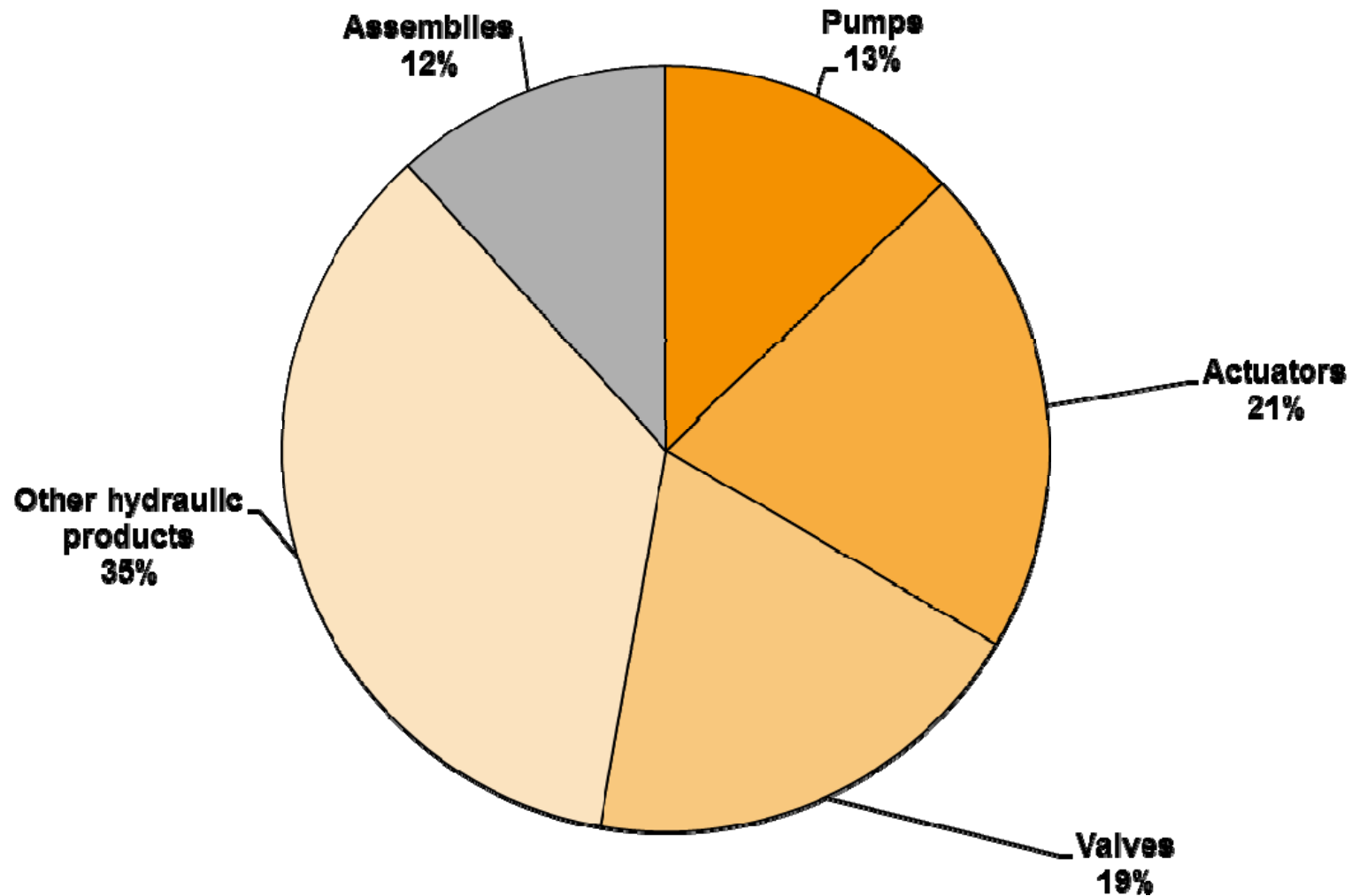
Who is CETOP?



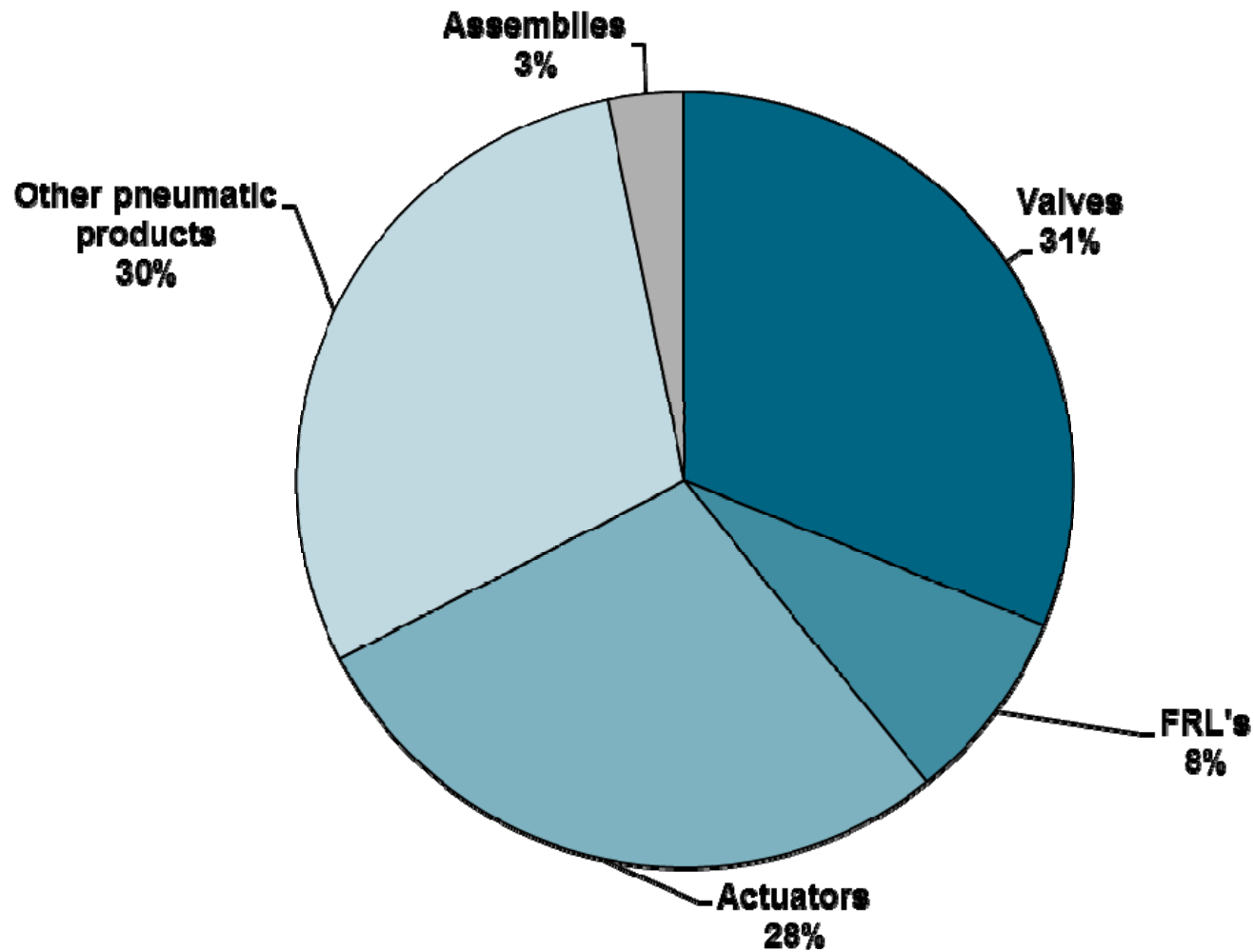
CETOP Statistics: European Fluid Power Industry Fluid Power Home Market (Estimated): 12.6 billion Euro



CETOP Statistics: European Fluid Power Industry Hydraulic Products (Estimated): 8.9 billion Euro

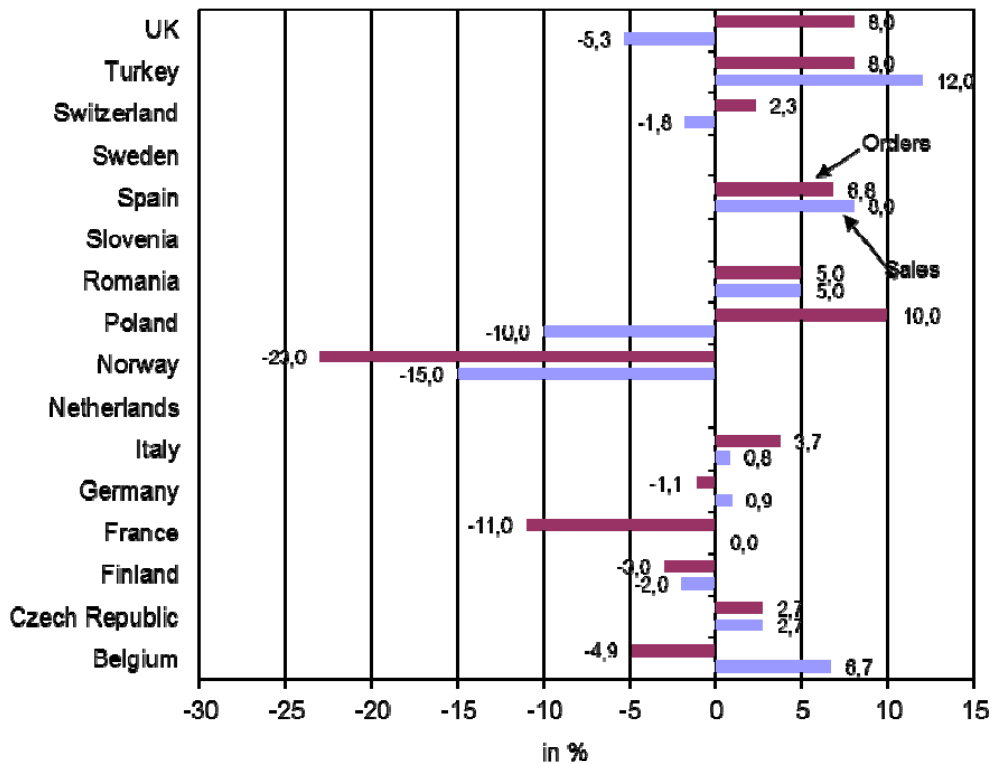


CETOP Statistics: European Fluid Power Industry Pneumatic Products (Estimated): 3.8 billion Euro

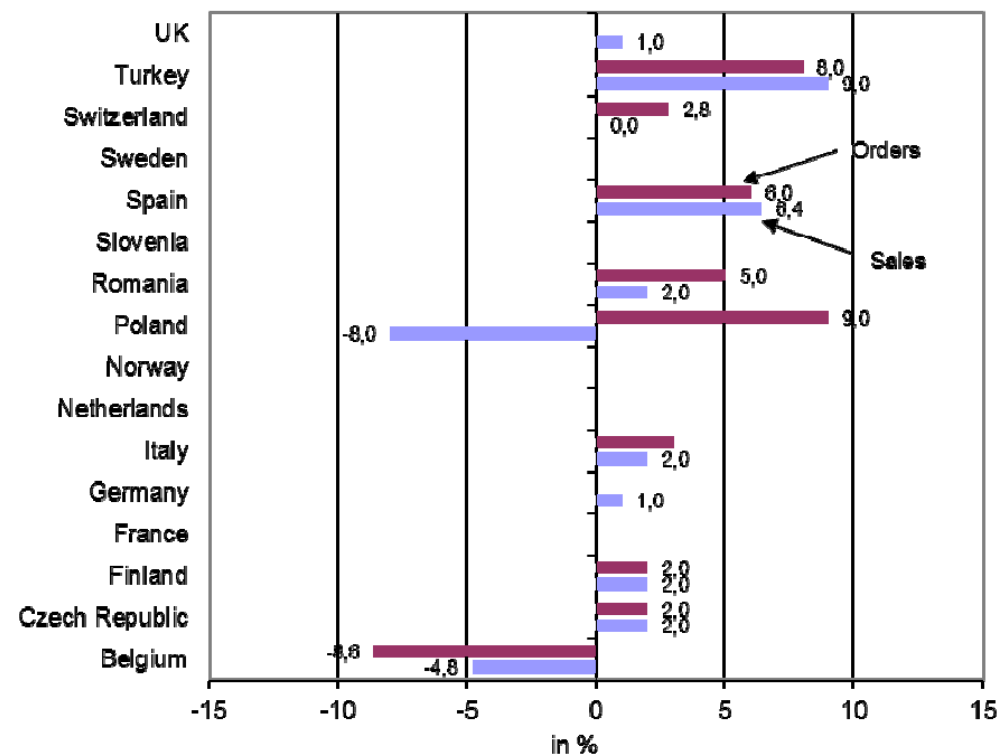


CETOP Statistics: European Fluid Power Industry Hydraulics Development 2016 and Forecast 2017

Hydraulics **Orders** and **Sales** Changes Jan-Dec 2016/Jan-Dec 2015
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2016

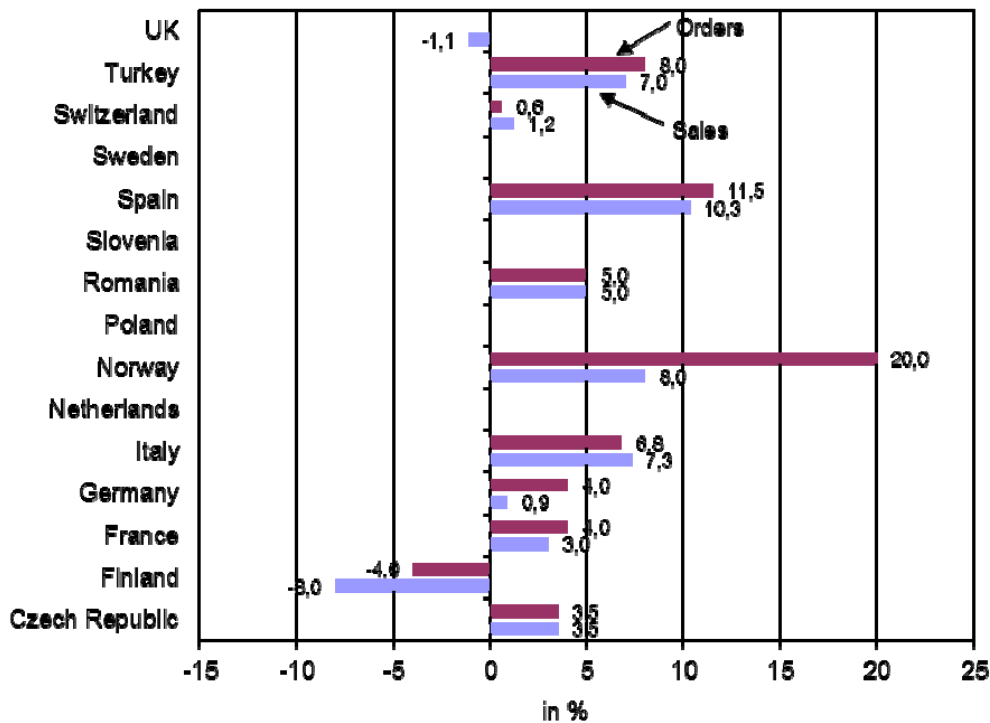


Hydraulics **Orders** and **Sales** Forecast 2017/2016
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2016

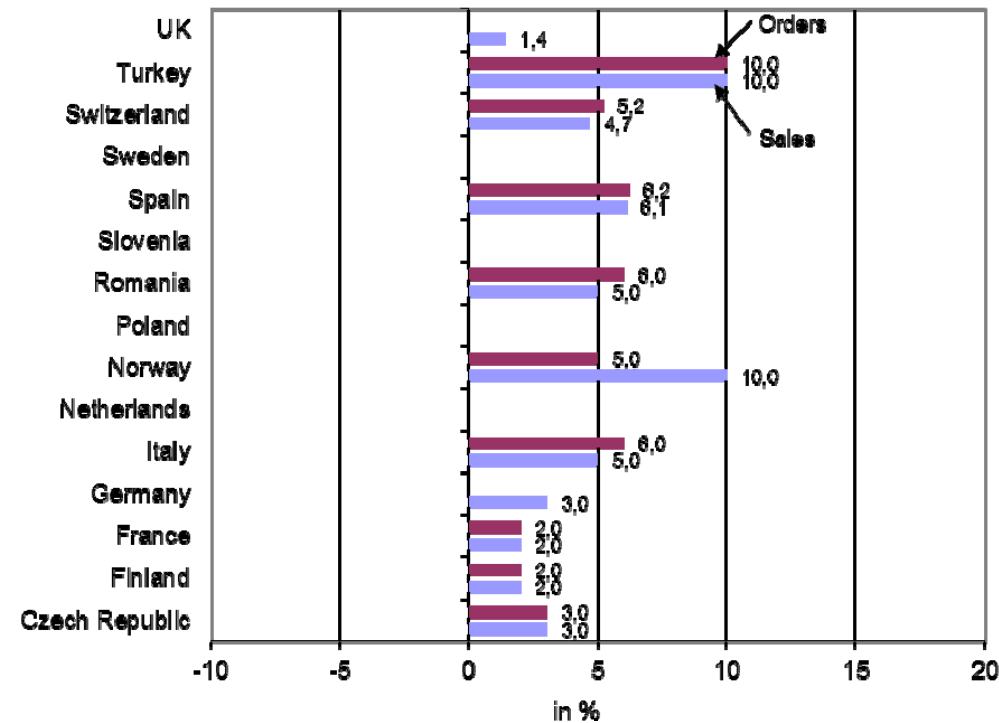


CETOP Statistics: European Fluid Power Industry Pneumatics Development 2016 and Forecast 2017

Pneumatics **Orders** and **Sales** Changes Jan-Dec 2016/Jan-Dec 2015
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2016



Pneumatics **Orders** and **Sales** Forecast 2017/2016
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2016



Excerpt from CETOP/ISC Monthly exchange on tendencies January 2017

3. New orders (compared to previous month)

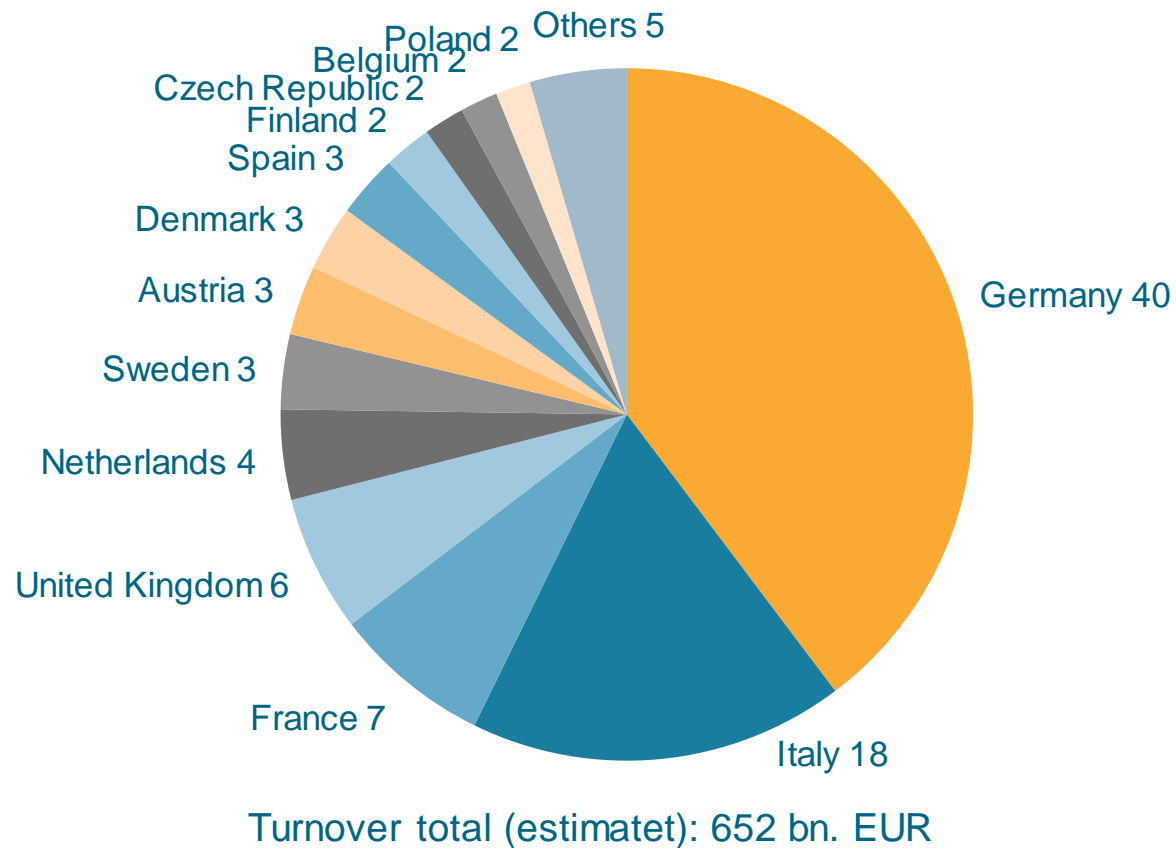
COUNTRIES*	B	CH	CZ	D	E	F	FIN	I	IND	NL	S	SLO	TR	UK	USA	VRC	
Industrial hydraulics																	
up	Green	White	Green	Green	White	Green	Green	Green	Green	Green	Green	Green	White	White	White	White	White
same	White	Yellow	White	White	Yellow	White	White	White	White	White	White	White	White	Yellow	White	Yellow	White
down	White	White	White	White	White	White	White	White	White	White	White	White	White	Red	White	Red	White
Mobile hydraulics																	
up	Green	White	White	Green	White	Green	White	Green	Green	Green	Green	Green	White	White	White	Green	White
same	White	Yellow	Yellow	White	Yellow	White	Yellow	White	White	White	White	White	White	Yellow	White	White	White
down	White	White	White	White	White	White	White	White	White	White	White	White	White	Red	White	Red	White
Pneumatics																	
up	Green	White	Green	Green	White	White	Green	Green	Green	Green	Green	Green	White	White	White	White	White
same	White	Yellow	White	White	Yellow	White	White	White	White	White	White	White	White	Yellow	White	White	White
down	White	White	White	White	White	Red	White	White	White	White	White	White	White	White	Red	Red	White

5. Expected business situation (in the next 3 months)

COUNTRIES*	B	CH	CZ	D	E	F	FIN	I	IND	NL	S	SLO	TR	UK	USA	VRC
more favourable	White	White	White	White	White	White	White	White	Green	White	Green	Green	White	Green	White	Green
unchanged	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	White	Yellow	White	White	Yellow	White	Yellow	White
less favourable	White	White	White	White	White	White	White	White	White	White	White	White	White	White	White	White

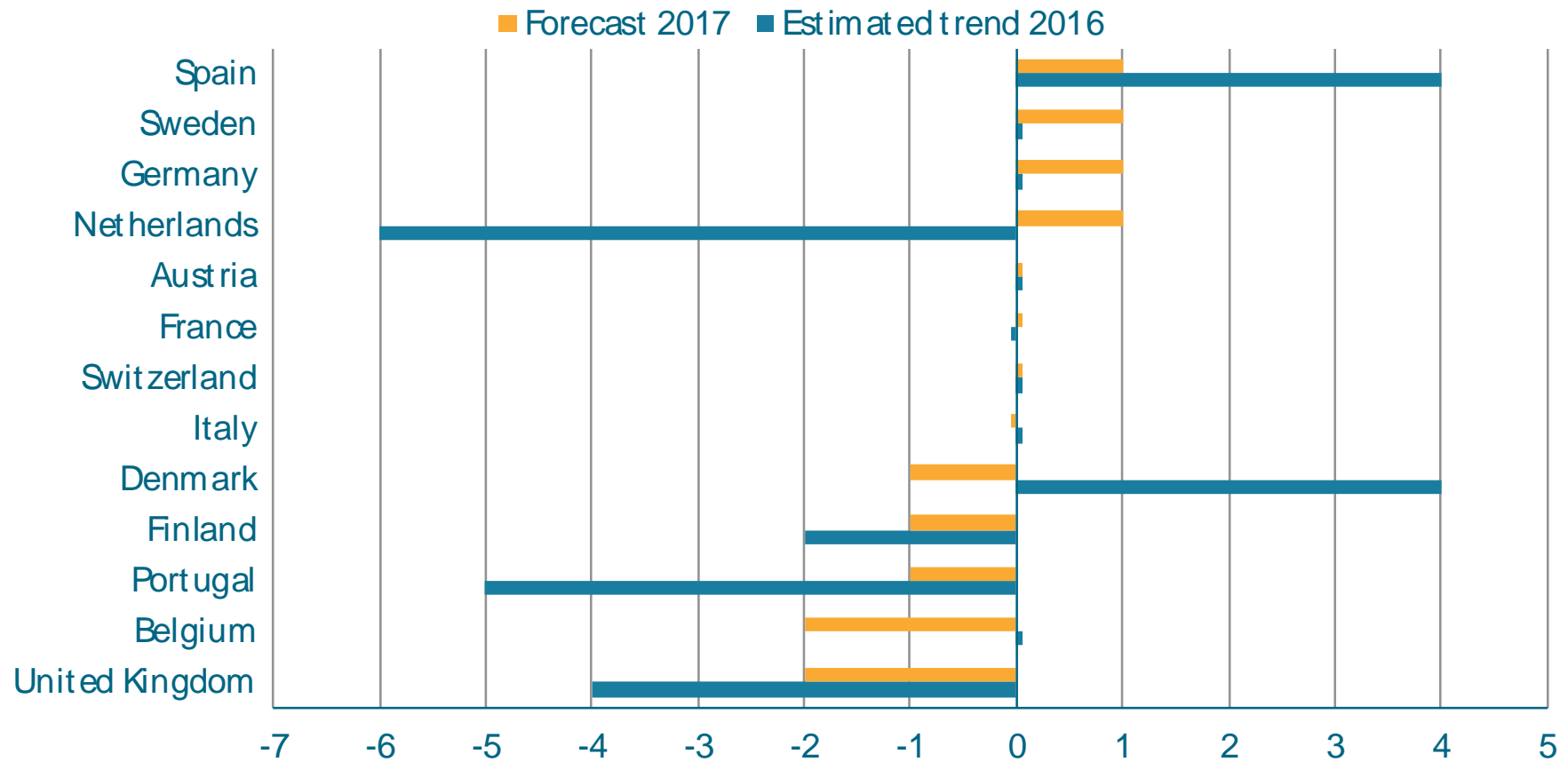
EU-Turnover in mechanical engineering 2015

Shares in percent



Turnover in European mechanical engineering

Real change against previous year in percent



Source: VDMA (October 2016)