

Germany: Economic Situation

International Fluid Power Summit meeting,
21 April 2021, Web Conference

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Chairman of the Board of the Fluid Power
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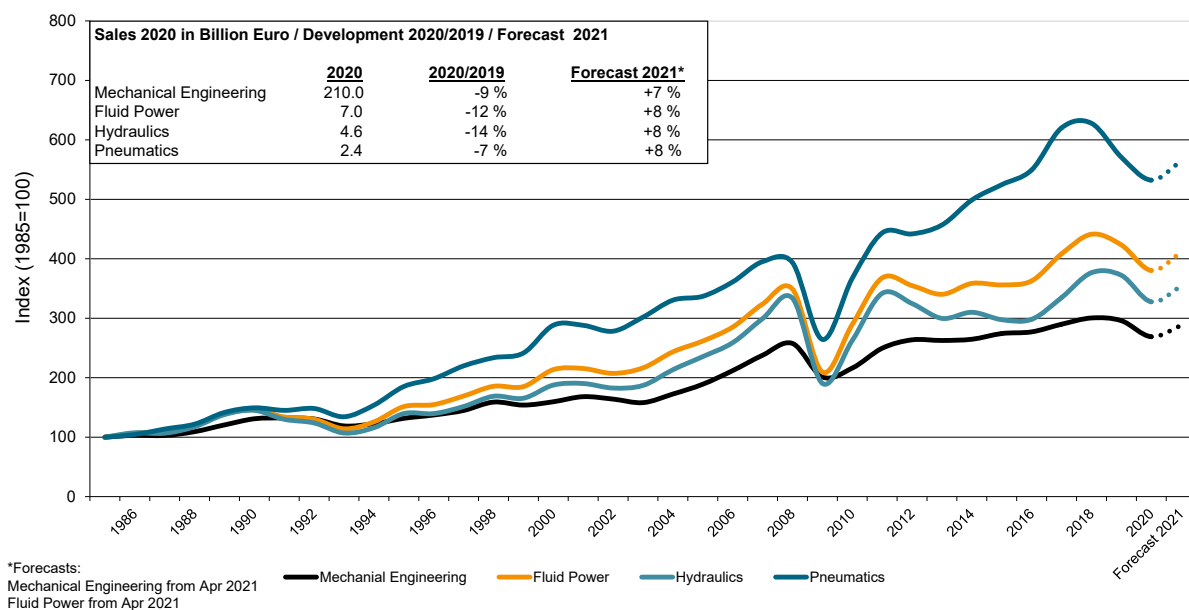
German Fluid Power

The Association – the industry

- » 215 member companies
- » Turnover: 7.0 Billion Euro
 - Hydraulics: 4.6 Billion Euro
 - Pneumatics: 2.4 Billion Euro
- » Export ratio: 60%
- » The member companies represent about 85% of the German Fluid Power market
- » Member of CETOP, the European umbrella association for Fluid Power
 - President: Stefan König, Danfoss, Germany
 - General Secretariat: Fluid Power Association within VDMA, Germany
- » Member of ISC - International Fluidpower Statistics Committee
 - ISC Chairman: Amadio Bolzani, Italy
 - ISC Secretary: Sylvia Grohmann-Mundschenk, Germany

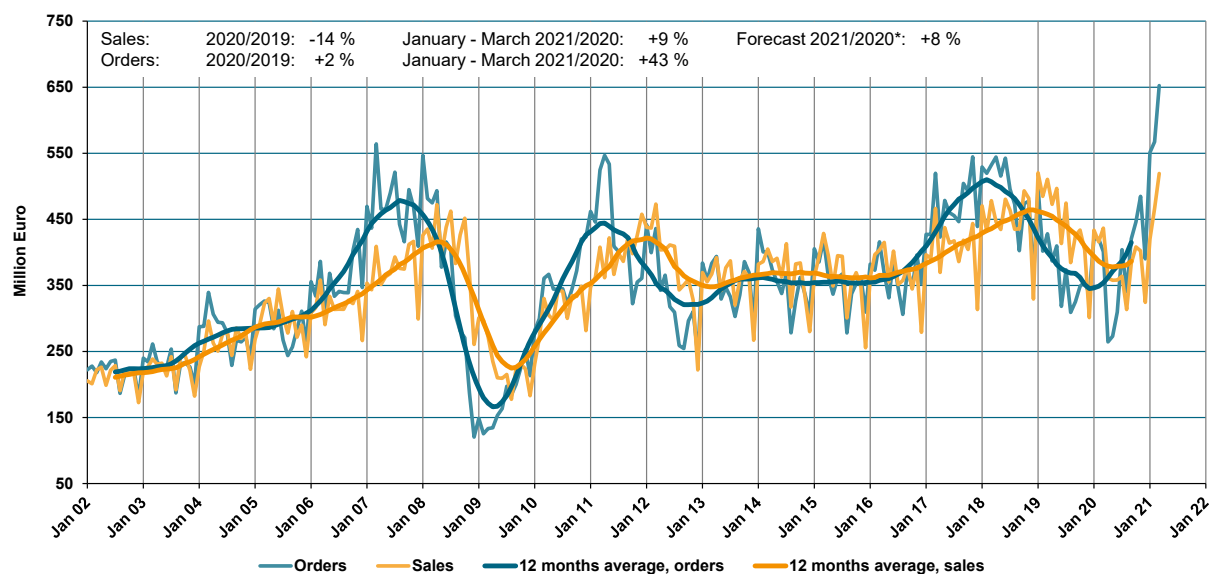
Sales Development

Mechanical Engineering / Fluid Power / Hydraulics / Pneumatics



Source: VDMA

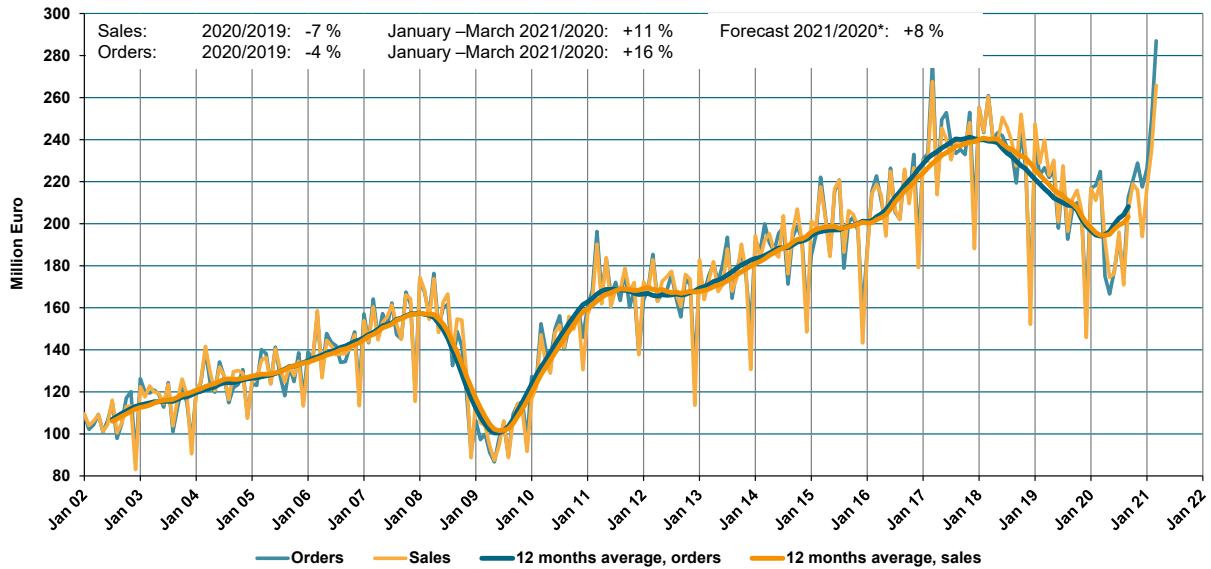
Hydraulics Sales and Orders



*Forecast from 9 April 2021

Source: VDMA

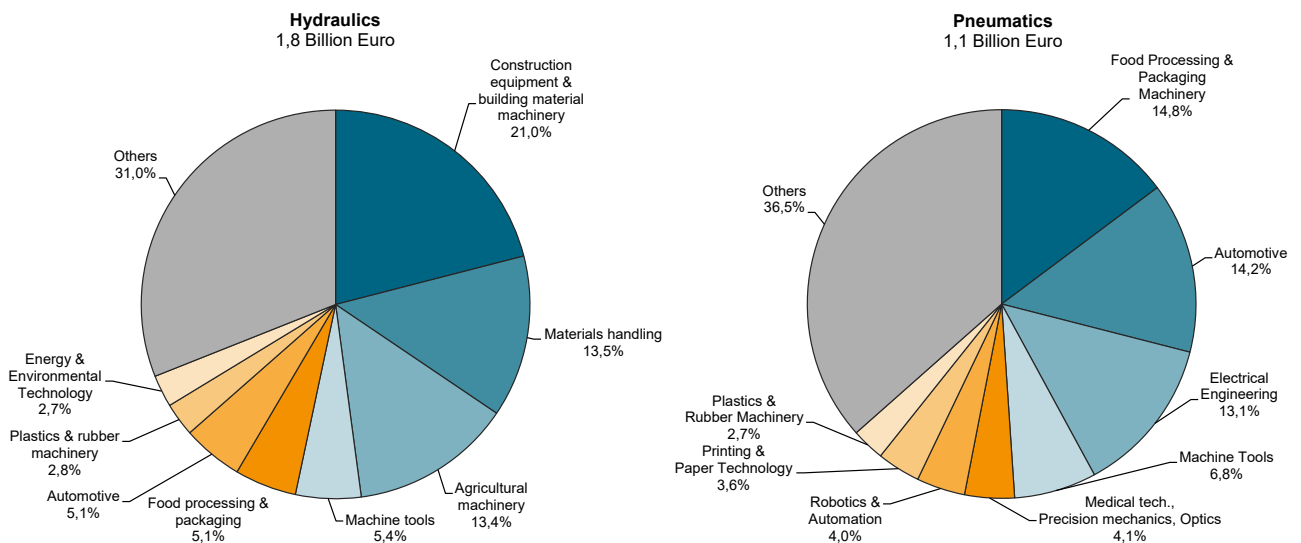
Pneumatics Sales and Orders



*Forecast from 9 April 2021

Source: VDMA

The main Customer Markets Fluid Power in % of the domestic sales



Source: VDMA

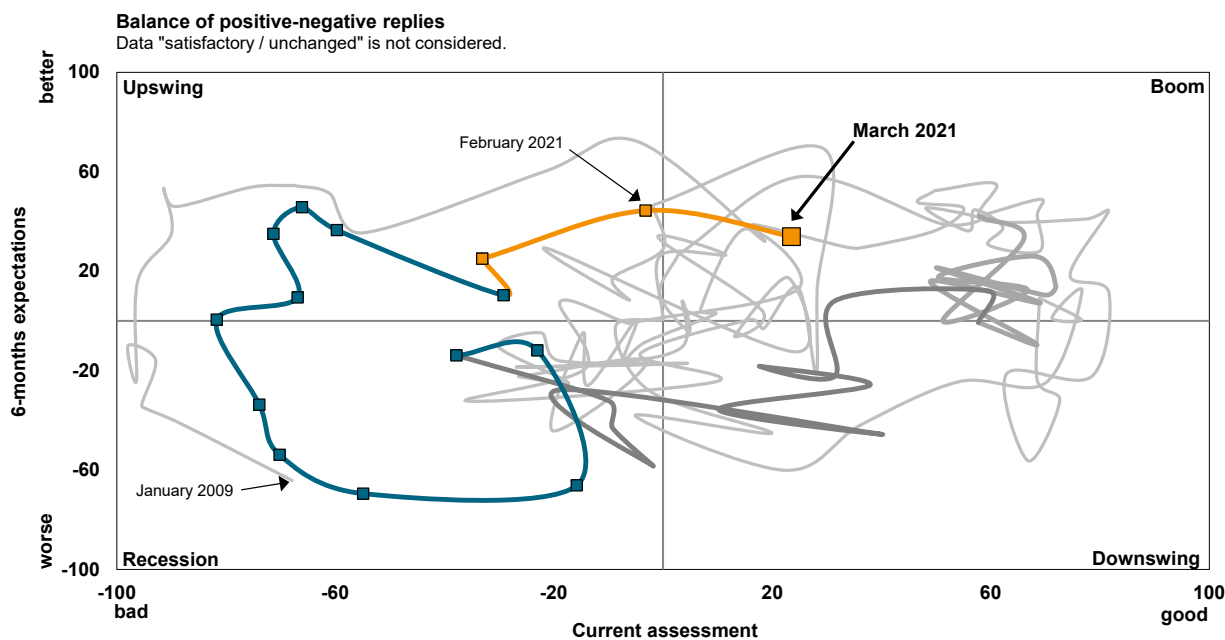
Development in major customer industries

New orders (recorded trends)	
Customer industries	Jan-Feb 2021/2020
Agricultural machinery	↑
Building material machines	↑↑↑
Construction equipment	↑
Food Processing & packaging machinery	↑
Machine tools	↑
Materials handling technology	↑
Mining equipment	↑↑↑
Plastics & rubber machinery	↑↑↑
Printing & paper machinery	↑
Process plant and equipment	↓↓↓
Robotics & automation	↑
Textile machinery	↑↑↑
Woodworking machinery	↑↑↑
Mechanical engineering	→
Power Transmission	↑
Pneumatics	↑
Hydraulics	↑↑↑

Legend	
↓↓↓ (Red)	< -30%
↓↓↓ (Orange)	-30% to -20%
↓ (Orange)	-20% to -10%
↓ (Yellow)	-10% to -2%
→ (Yellow)	-2% to +2%
↑ (Light Green)	+2% to +10%
↑ (Green)	+10% to +20%
↑↑ (Dark Green)	+20% to +30%
↑↑↑ (Dark Green)	>+30%

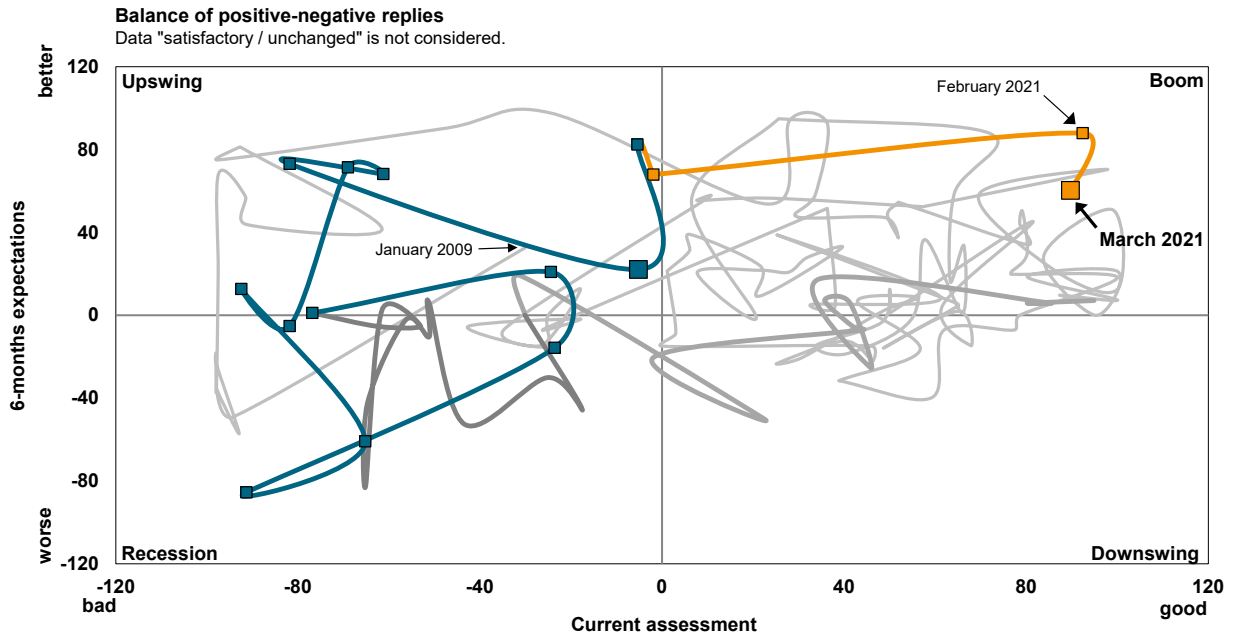
Source: VDMA

Ifo Business Cycle Clock Hydraulics



Source: ifo Institute, VDMA

Ifo Business Cycle Clock Pneumatics



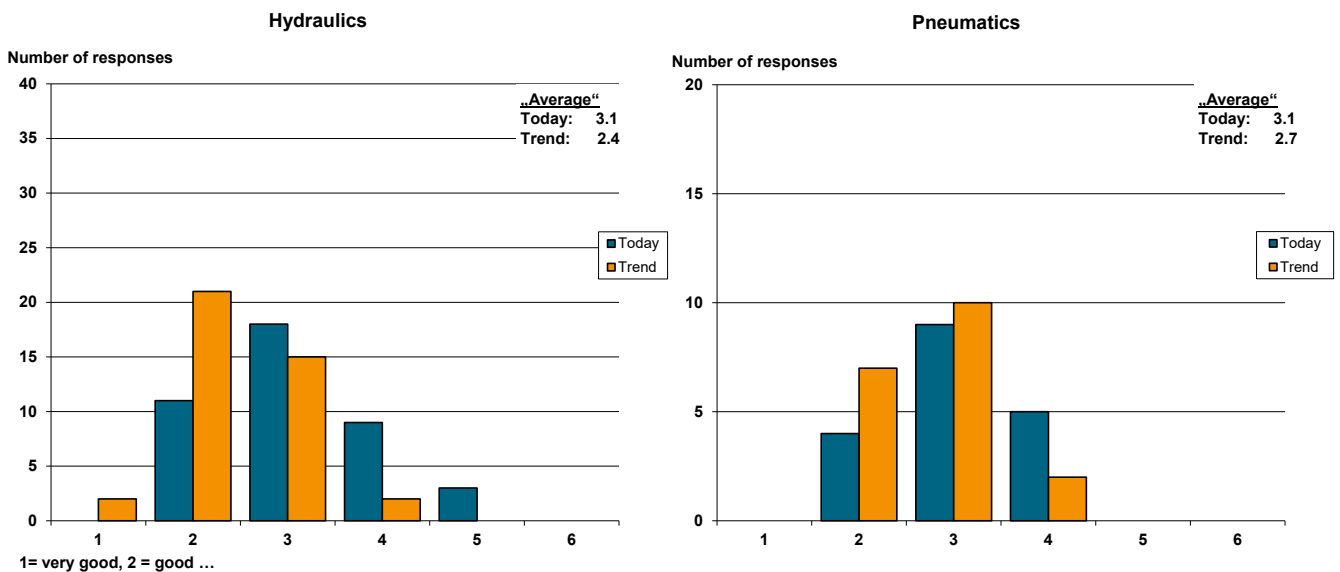
Source: ifo Institute, VDMA

Trend surveys on the economic situation

School Grades Hydraulics and Pneumatics

From the point of view of the member companies of the Fluid Power Association within VDMA

Spring 2021



Source: VDMA

Thank you
Thank you
for your attention!