



FEDERTEC



Economic situation & Fluid Power market in Italy

International Fluid Power Summit Meeting - web conference

21st April 2021

Economic situation in Italy

	2018	2019	2020	2021 *
GDP	+0,8%	+0,3%	-8,9%	+4,0%
Investment	+3,1%	+1,4%	-9,1%	+6,2%
Export (Goods & Services)	+2,3%	+1,2%	-13,8%	+10,2%
Import (Goods & Services)	+3,4%	-0,4%	-12,6%	+10,0%
Unemployment Rate	10,6%	10,0%	9,0%	11,0%

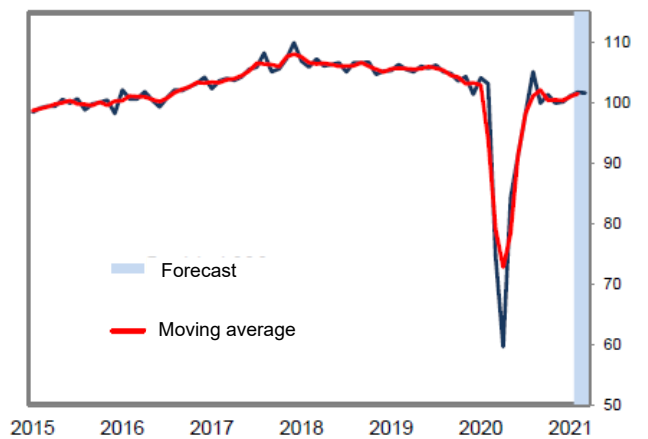
* Forecast

Source: ISTAT



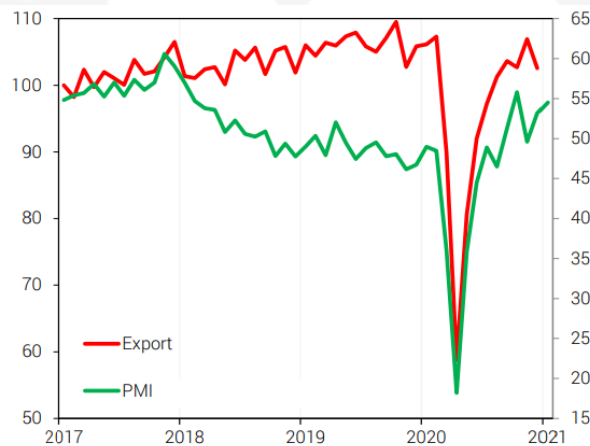
Economic situation in Italy

Industrial Production



Source: Confindustria

Export & PMI index



Fluid Power Market in Italy

Quarterly Trend Survey January-December 2020 / January-December 2019

Turnover

Orders

	HYDRAULICS	PNEUMATICS	HYDRAULICS	PNEUMATICS
Exports	-13,2%	-2,6%	+1,5%	-0,8%
Imports	-20,5%	-10,8%	-4,7%	-10,9%
HOME MARKET	-18,8%	-10,3%	-8,8%	-9,4%
Production	-14,7%	-5,6%	-2,6%	-3,6%



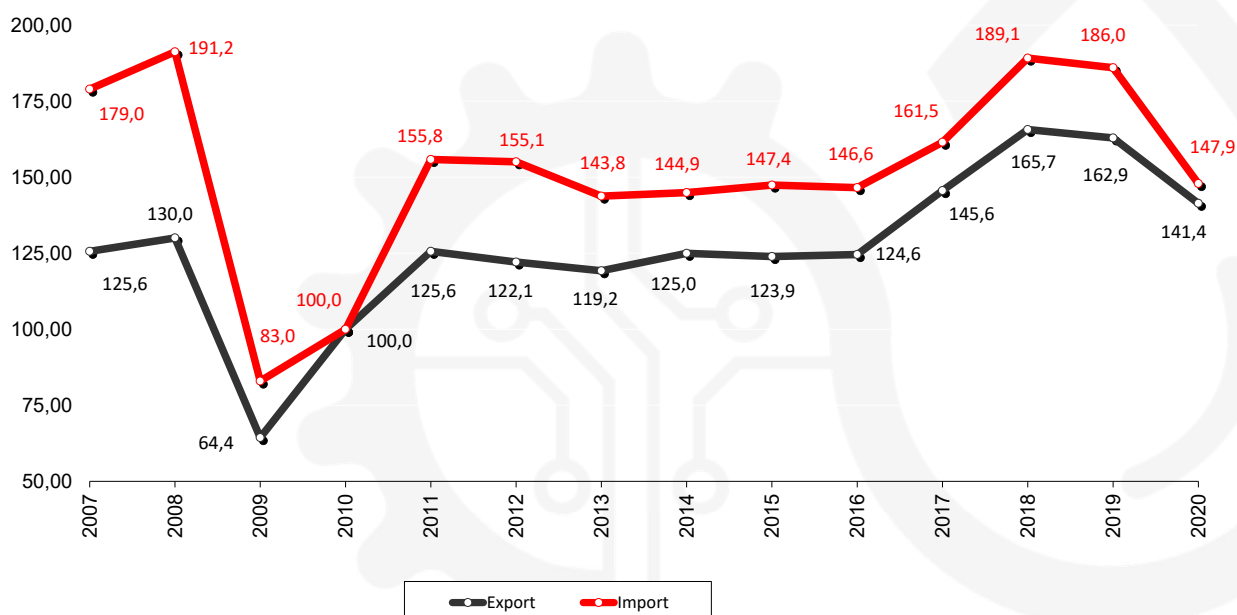
Fluid Power Home Market in Italy (preliminary result 2020)

HYDRAULICS	2020	% 20/19
Export	1.693	-13,2%
Import	455	-20,5%
Home Market	1.207	-18,8%
Production	2.446	-14,7%

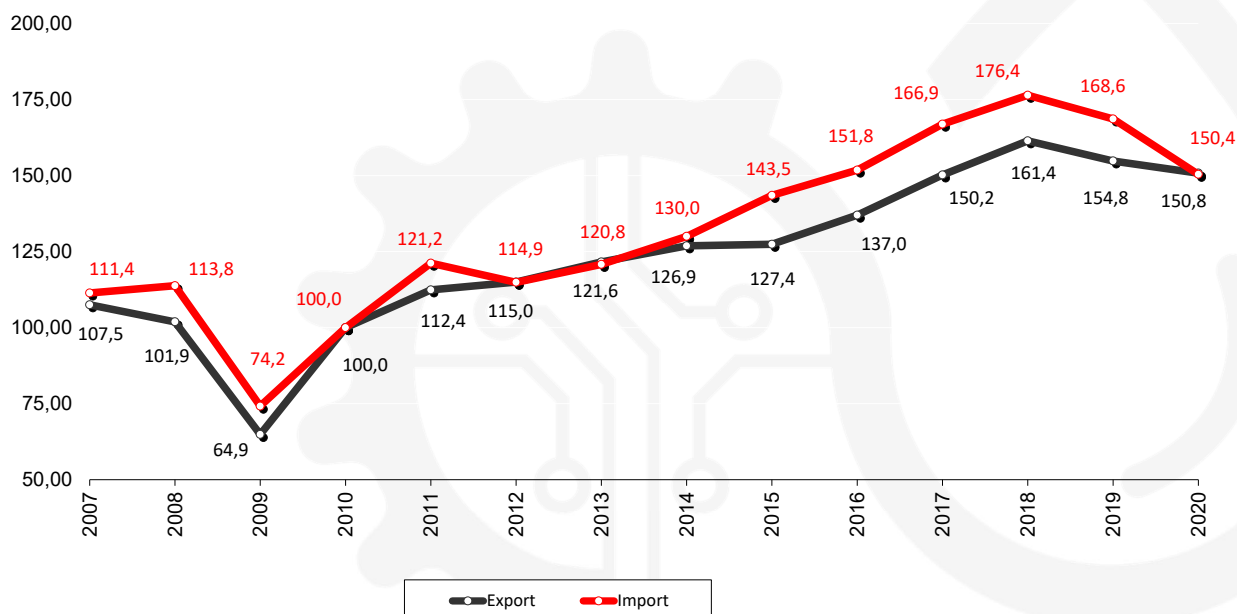
PNEUMATICS	2020	% 20/19
Export	457	-2,6%
Import	412	-10,8%
Home Market	730	-10,3%
Production	775	-5,6%

FLUID POWER	2020	% 20/19
Export	2.150	-11,1%
Import	867	-16,2%
Home Market	1.937	-15,8%
Production	3.221	-12,7%

Hydraulic Index (2007-2020)



Pneumatic Index (2007-2020)



Fluid power and-use markets in Italy (*)

Machine tools, robots and automation	-23,7%
Agricultural machinery	-3,4%
Construction machinery	+0,2%
Plastics and rubber machinery	-17,0%
Woodworking machinery	-18,5%
Packaging machinery	-5,0%



* Preliminary results

2020