



Germany – Economic Situation Fluid Power



VDMA Fluid Power

The Association – the industry

- » 235 member companies
 - Fluid Power
 - Turnover: 9.6 Billion Euro
 - » Hydraulics: 6.4 Billion Euro
 - » Pneumatics: 3.2 Billion Euro
 - Export ratio: 60%
 - The member companies represent about 85% of the German Fluid Power market
 - Sealings
 - Turnover: 1,3 Billion Euro
- » Member of CETOP, the European umbrella association for Fluid Power
 - President: Arjan Coppens, Bosch Rexroth, Netherlands
 - General Secretary: Sylvia Grohmann-Mundschenk, VDMA, Germany
- » Member of ISC - International Fluidpower Statistics Committee
 - ISC Chairman: Amadio Bolzani, Italy
 - ISC Secretariat: CETOP



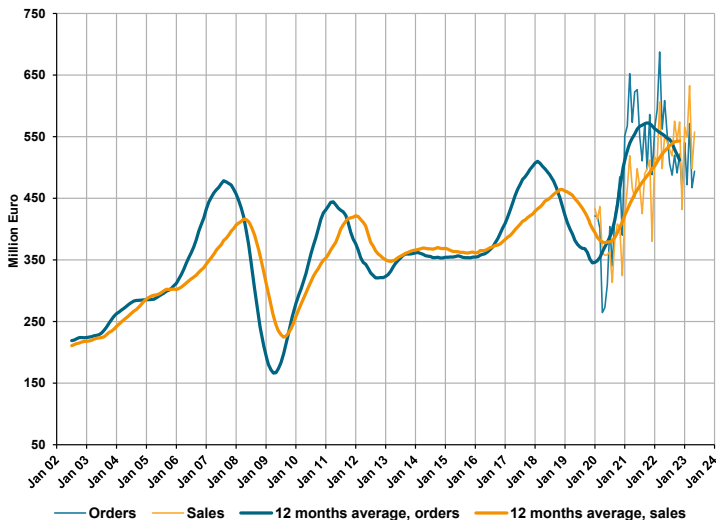
Chart 1 | 23 June 2023

Hydraulics and Pneumatics Sales and Orders in nominal terms



Hydraulics

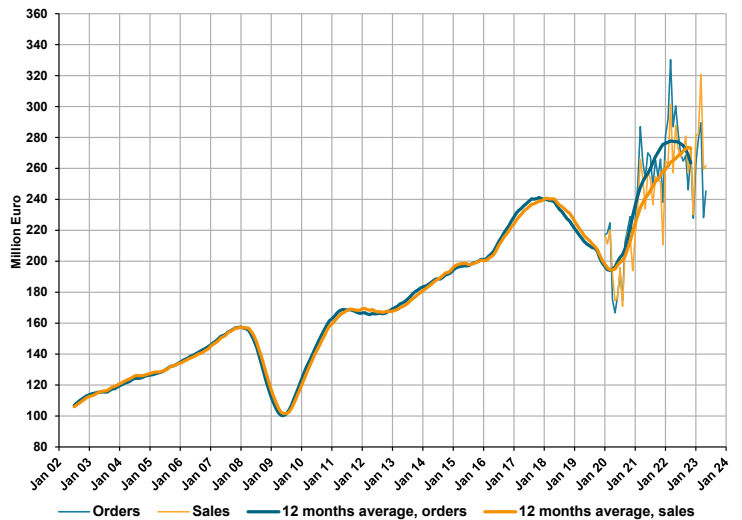
Sales: 2022/2021: +14 % Jan - May 2023/2022: +5 % Forecast 2023/2022*: +3 %
 Orders: 2022/2021: -4 % Jan - May 2023/2022: -16 %



*Forecasts from March 2023

Pneumatics

Sales: 2022/2021: +10 % Jan - May 2023/2022: +2 % Forecast 2023/2022*: +3 %
 Orders: 2022/2021: +7 % Jan - May 2023/2022: -12 %



Source: VDMA

VDMA Fluid Power

Chart 2 | 23 June 2023

Development in major customer industries in Germany



New orders (recorded trends)		
Customer industries	Jan - Dec 2022/2021	Jan - April 2023/2022
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	→	↔
Machinery and equipment manufacturing	→	→
Power Transmission	→	→
Hydraulics	→	→
Pneumatics	→	→

Explanation	
↔	< -30%
↔	-30% to -20%
↔	-20% to -10%
↔	-10% to -2%
→	-2% to +2%
→	+2% to +10%
→	+10% to +20%
→	+20% to +30%
→	>+30%

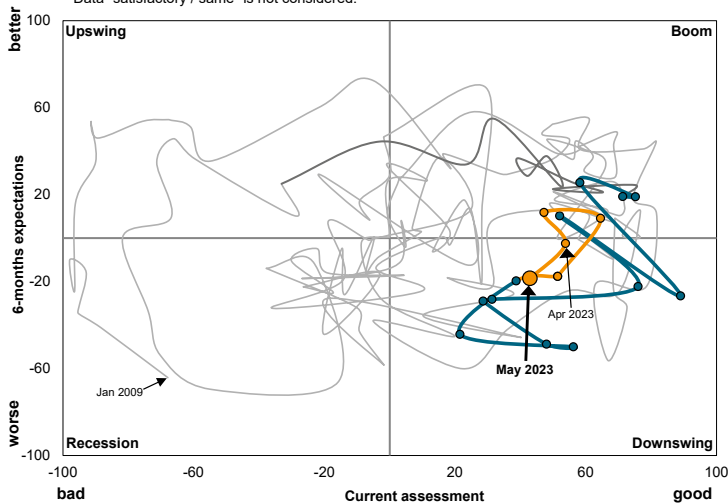
Source: VDMA Statistics
*Federal Statistical Office Germany

Ifo Business Cycle Clocks Hydraulics and Pneumatics



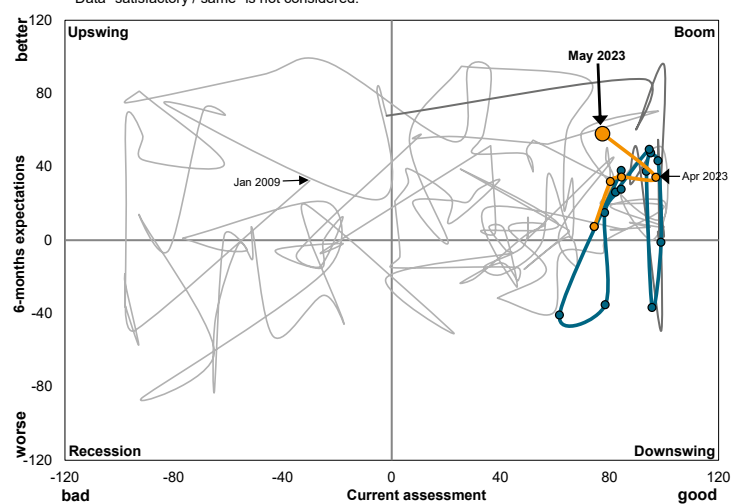
Hydraulics

Balance of positive-negative replies
Data "satisfactory / same" is not considered.



Pneumatics

Balance of positive-negative replies
Data "satisfactory / same" is not considered.



Source: ifo Institute, VDMA

**Forecast by the Board of the Fluid Power Association
2023
Fluid Power, Hydraulics and Pneumatics from 23 March 2023
in nominal terms**



	2023
Fluid Power:	+ 3 %
Hydraulics:	+ 3 %
Pneumatics:	+ 3 %

Source: VDMA