

6. CETOP current activities: Economics

- Current activities
 - Market Outlook Web Conference
 - October 2022
 - March 2023
 - next date: 26 October 2023
 - Regular collection of CETOP and ISC Statistics, following a strict schedule
 - CETOP Economic Commission online activities
 - Online collection using web portal
 - results tables available in the member section of the CETOP website
 - market outlook presentations available in the member section

23 June 2023

Chart 1

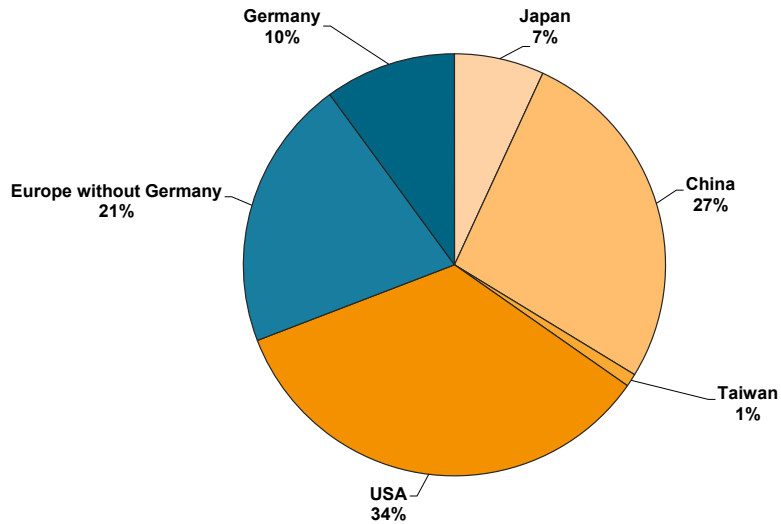
Survey Calendar 2024

	Questionnaire	Return	Published
Monthly Exchange on Tendencies	First working day of month	End of 1° week	End of 2° Week
Quarterly Trend Survey			
<i>Quarter 1</i>	28/03/2024	1 month later	1 month later
<i>Quarter 1 to 2</i>	31/05/2024		
<i>Quarter 1 to 3</i>	30/09/2024		
<i>Quarter 1 to 4</i>	08/01/2025		
Annual Product Statistics	28/03/2024	1 month later	1 month later

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Chart 2

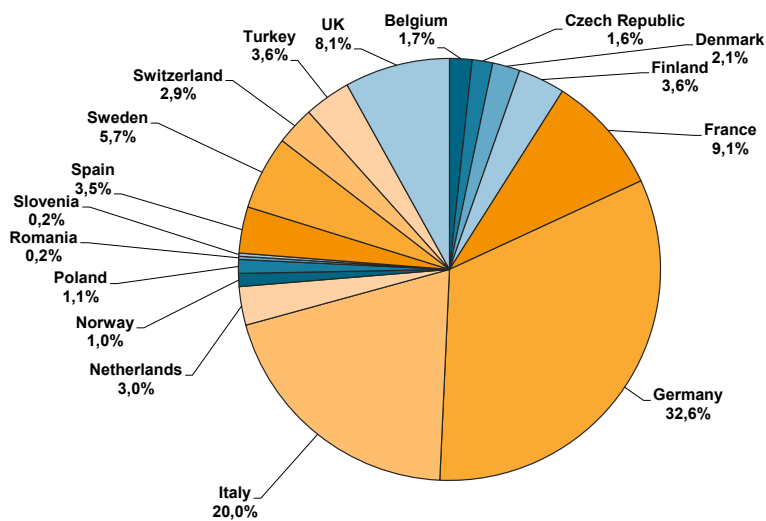
ISC Statistics: National Home Sales - global
Fluid Power 2022 (estimated): 53.2 Billion Euro - preliminary



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Chart 3

CETOP Statistics: National Home Sales - Europe
Fluid Power 2022 (estimated): 16.4 Billion Euro - preliminary

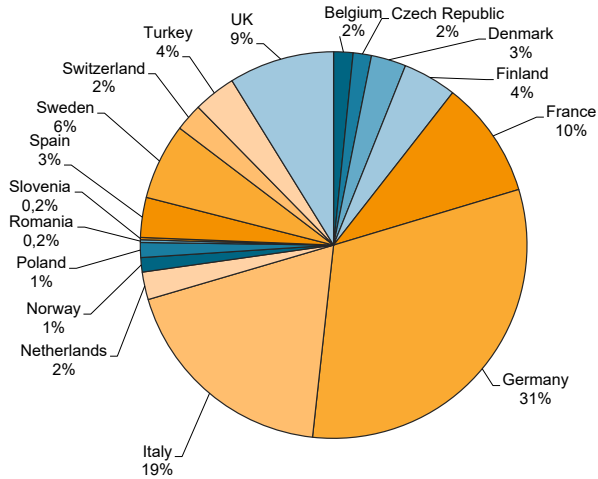


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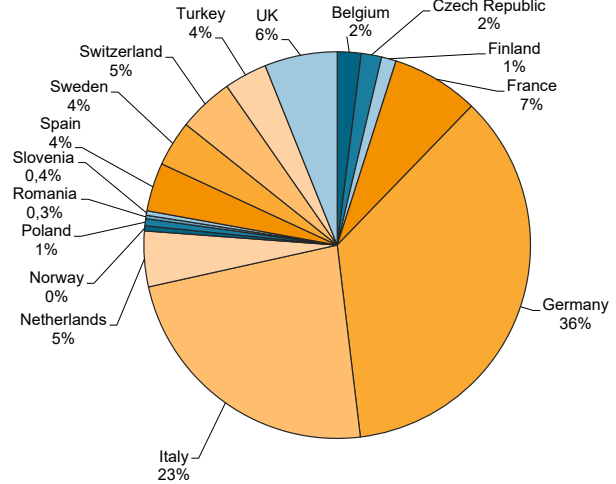
Chart 4

CETOP Statistics: National Home Sales - Europe Hydraulics and Pneumatics by Countries 2022 (estimated) - preliminary

Hydraulics (estimated): 11.9 Billion Euro



Pneumatics (estimated): 4.5 Billion Euro

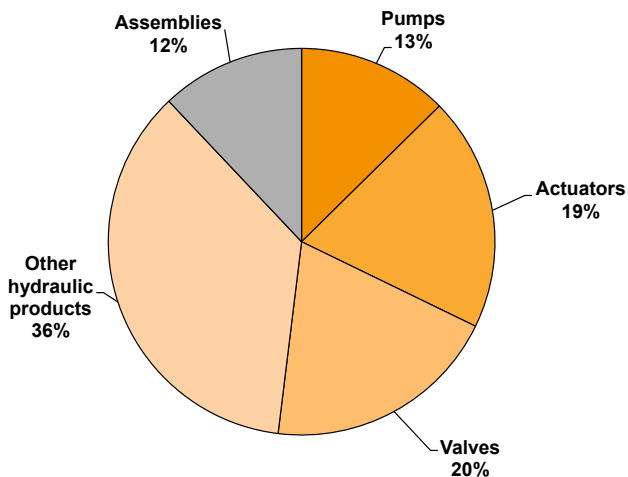


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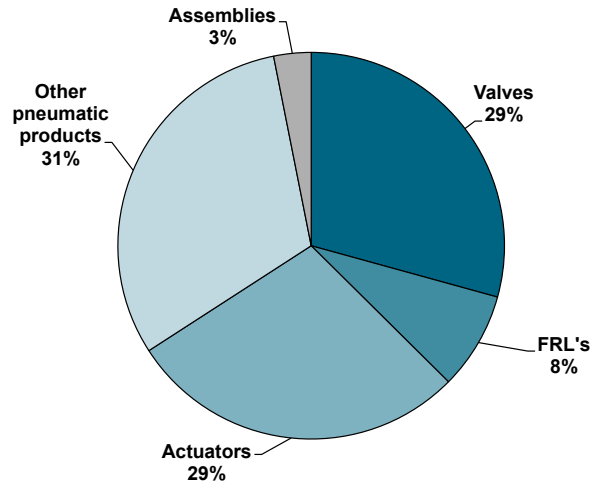
Chart 5

CETOP Statistics: National Home Sales - Europe Hydraulics and Pneumatics by Products 2022 (estimated) - preliminary

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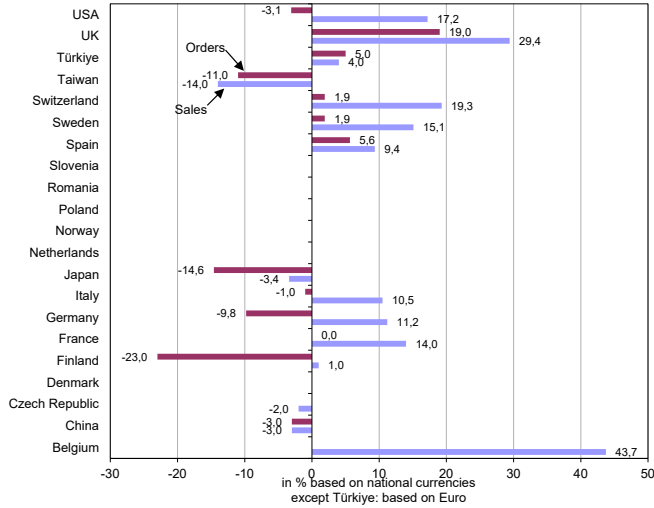
23 June 2023

Chart 6

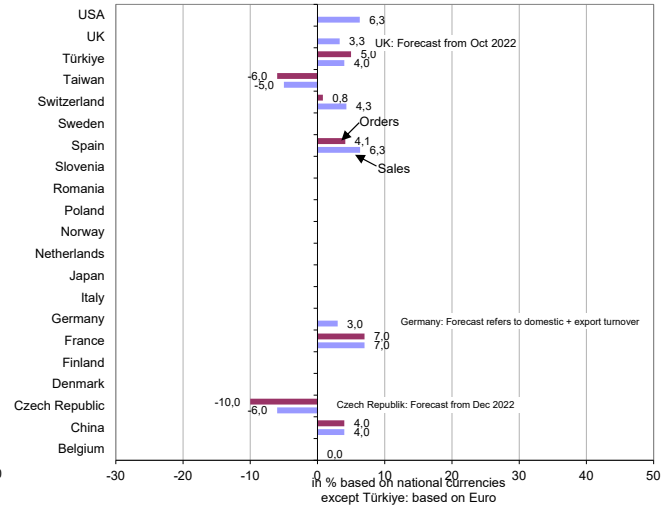
CETOP/ISC Statistics: Global Fluid Power Industry

Hydraulics Development and Forecast 2023 by the national associations

Hydraulics Orders and Sales Changes Jan-Mar 2023/Jan-Mar 2022
CETOP/ISC Quarterly Trend Survey 1 Quarter 2023



Hydraulics Orders and Sales Forecast 2023/2022
CETOP/ISC Quarterly Trend Survey 1 Quarter 2023



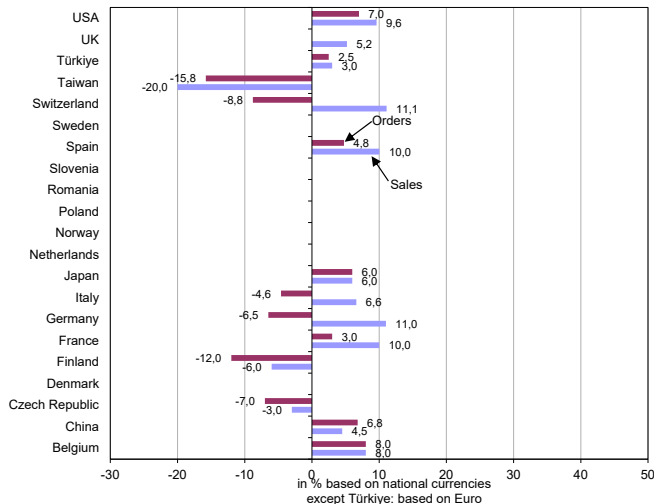
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Chart 7

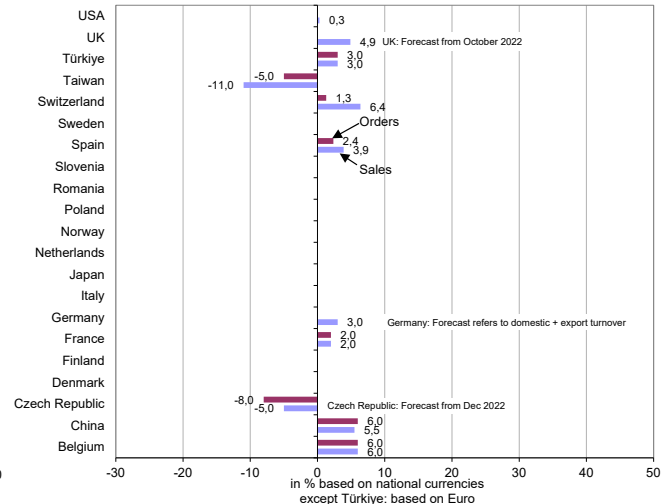
CETOP/ISC Statistics: Global Fluid Power Industry

Pneumatics Development and Forecast 2023 by the national associations

Pneumatics Orders and Sales Changes Jan-Mar 2023/Jan-Mar 2022
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Pneumatics Orders and Sales Forecast 2023/2022
CETOP/ISC Quarterly Trend Survey 1 Quarter 2023



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Chart 8

CETOP / ISC leading indicators Fluid Power

Excerpt from CETOP/ISC Monthly exchange on tendencies, April 2023

3. New orders (compared to previous month)

COUNTRIES		B	CH	CZ	D	DK	E	F	FIN	I	NL	S	SLO	TR	UK	USA	VRC
Industrial hydraulics	up															March	March
	same																
	down																
Mobile hydraulics	up															March	
	same																
	down															March	
Pneumatics	up															March	
	same																
	down																

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

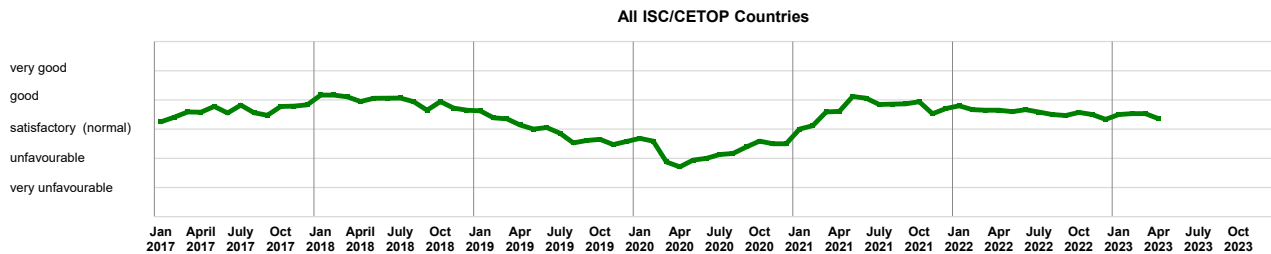
COUNTRIES		B	CH	CZ	D	DK	E	F	FIN	I	NL	S	SLO	TR	UK	USA	VRC
more favourable																	
unchanged						Hy							Hy		March	March	
less favourable																	

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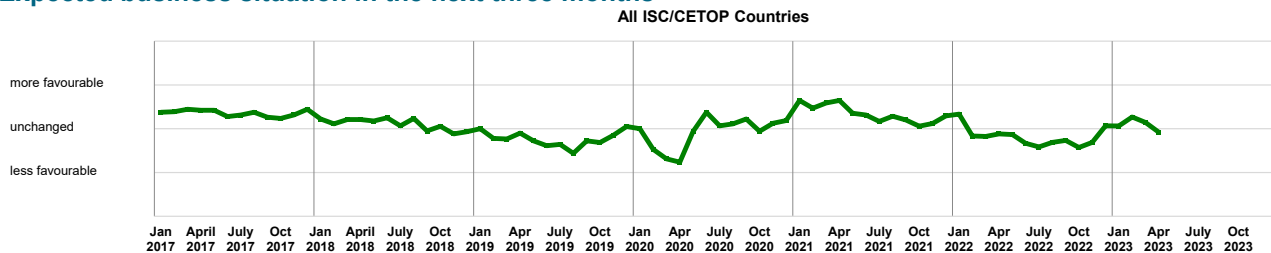
Chart 9

CETOP / ISC leading indicators Fluid Power - Development January 2017 - April 2023

Business climate



Expected business situation in the next three months



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Chart 10

6. CETOP current activities: Education

Nik Watson

Vice President Education & Training

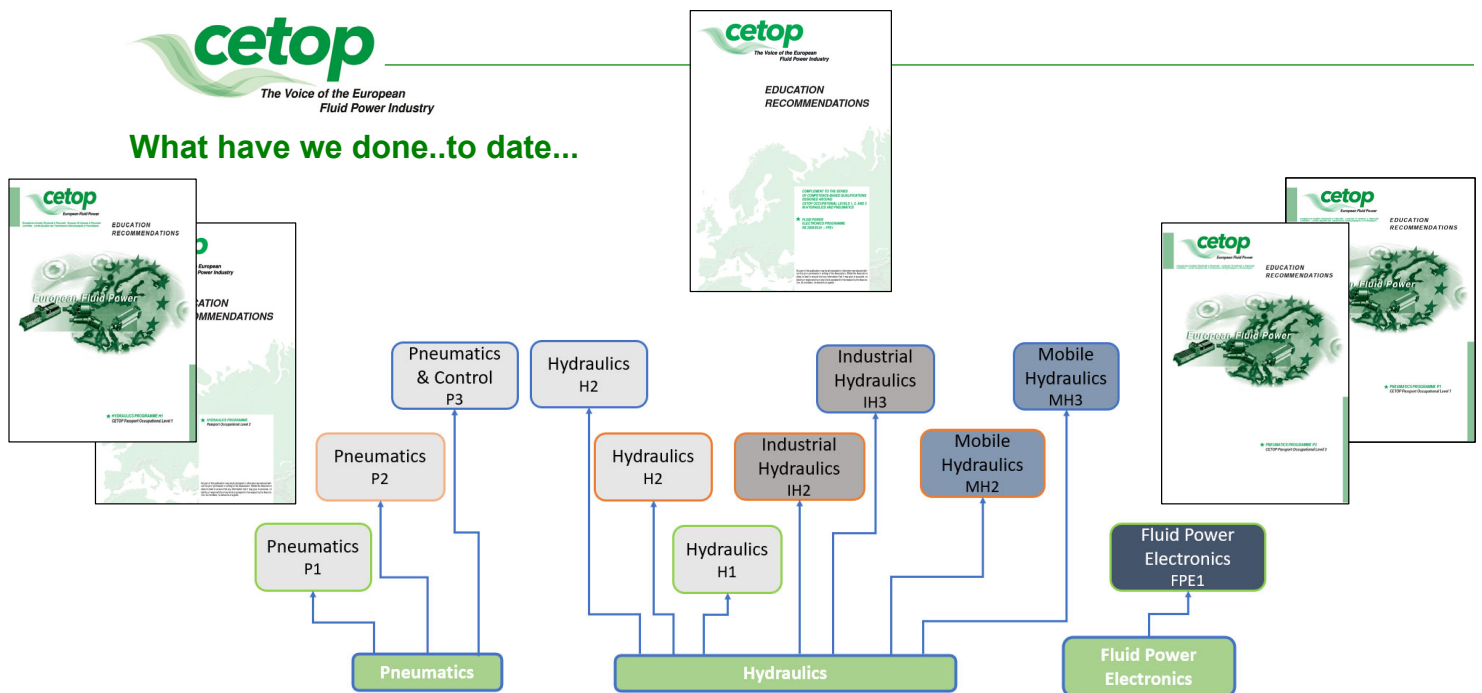
22 - 23 June 2023



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Chart 11

What have we done..to date...



11 course recommendation documents

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Chart 12

LEVEL 1 This person will perform activities that follow an established procedure. Activities will be recurring and of a short term nature. The reaction to most problems will be to summon help or follow a predefined set of actions.

LEVEL 2 This person will perform a variety of activities and needs understanding of the technical factors involved. The activities may require the interpretation and application of varied and non routine specifications. Activities will involve the use of simple diagnostic checks and ability to make a positive response to deviations. Co-operation with others in team or work groups may be required.

LEVEL 3 This person will be involved in a broad and often complex range of activities, often requiring independent decisions to be made on technical matters concerning specifications, resources or processes. Planning of work will be a responsibility as will the finding and rectification of faults. Responsibility for the quality of work undertaken and the required outcomes are also included.

11 countries :

Denmark (2 centres)
Finland (1 centre)
France (3 centres)
Italy (15 centres)
Netherlands (3 centres)
Norway (3 centres)
Poland (4 centres)
Sweden (3 centres)
Switzerland (1 centre)
UK (2 centres)
Turkey (1 centre)

What are we working on at the moment...



1. Update Pneumatics documentation 'P1'
2. Create EU 'working group' of delivery centres to share 'best working practices'
3. Visits to other delivery centres (EU) to view facilities
4. Research change of wording in documentation from **Education and Training** to **Learning and Development**
5. Increase range of certificates within current deliverers
6. Increase Pneumatics P1 uptake

(low compared to Hydraulics:

H1= 266, P1= 84, H2= 4, P2= 41, IH2= 13, H3= 4, IH3= 2)

What are we looking at doing...

1. Increase member country adoption (19 associations – 11 current offer)
2. Dual certification (local and CETOP)
3. Country delivery co-operation support increase
4. 'Support package' for member associations to assist CETOP certification delivery
5. CETOP passport for 'proof of competence' in fluid power
6. Update Pneumatics documentation 'P2' and 'P3'
7. Survey members, what do they **WANT/NEED NOW**
8. Investigate/Create Technical Resource Portal



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Chart 15

6. CETOP current activities: Marketing and Communication

- Current activities
 - Brochure: CETOP European Fluid Power – efficient, sustainable and digitized
 - New CETOP Website
 - Increased visibility of CETOP at the „Hannover Messe“
 - International Motion and Drives summit meeting, organized by CETOP and EUROTRANS
 - Video speech about CETOP on the occasion of the 50 year anniversary of FPSI

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Chart 16

6. CETOP current activities: Technics

Main activity of the Technical Commission

Monitoring European directives and regulations that may have an impact on the fluid power sector

Then, if necessary :

- Draw up CETOP positions
- Defend these positions at European level and ensure that CETOP member associations relay the positions to their EU representatives.

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Concrete actions

- ✓ **Publication of a biannual newsletter** containing key information for associations
- ✓ **One or two video conference meetings per year:** to review the EU commission's projects, exchange views and define positions.

6. CETOP current activities: Technics

Monitoring EU Directives and Regulations

- ✓ Reach : PFAS, lead, ...
- ✓ ROHS
- ✓ Machine Regulation
- ✓ Eco design Directive
- ✓ Pressure Directive
- ✓ Green Deal :
 - Sustainable Products Initiative with: Digital Product Passport...
 - Waste legislation
 - Fit for 55 : carbon market and Carbon border adjustment mechanism (CBAM)...

CETOP

Position papers

- ✓ PP01 : Safety machinery
- ✓ PP04 : Pressure directive
- ✓ PP07 : Machine directive

CETOP Technical Commission yesterday

- ✓ PFAS EU Project
- ✓ Machinery regulation: what's new compared to the Machinery Directive

Comments

- ✓ Some organizational difficulties:
 - Retirement in July of the ARTEMA Technical Manager,
 - Arrival of a new manager in September, who is gradually taking over all the files for Fluid Power, but also for Mechanical Drives, Mechatronics, Sealing solutions, Bearings...

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