



German 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 | November 2023

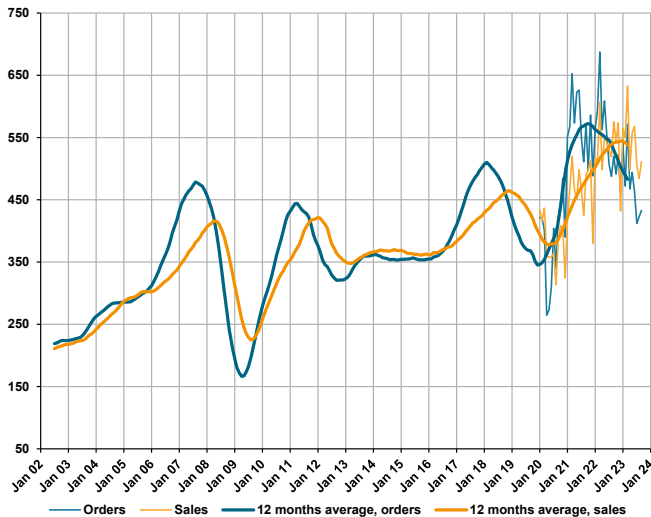
Hydraulics and Pneumatics Sales and Orders in nominal terms



Hydraulics

Sales: 2022/2021: +14 % Jan - Sept 2023/2022: +1 % Forecast 2024/23: -4 %
 Orders: 2022/2021: -4 % Jan - Sept 2023/2022: -16 %

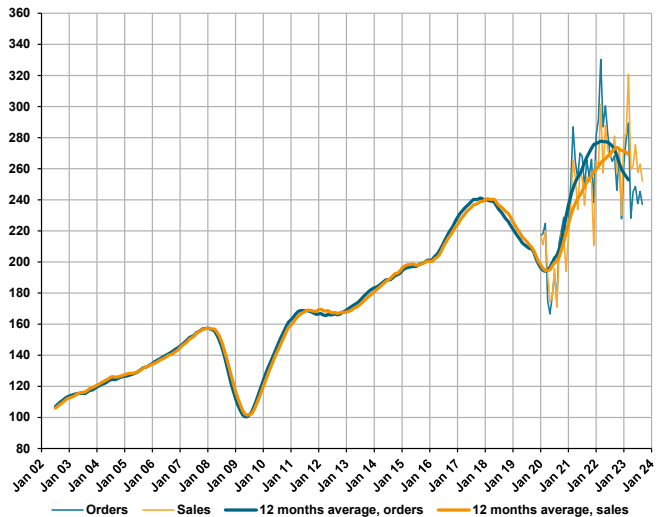
Million Euro



Pneumatics

Sales: 2022/2021: +10 % Jan - Sept 2023/2022: -1 % Forecast 2024/23: -4 %
 Orders: 2022/2021: +7 % Jan - Sept 2023/2022: -12 %

Million Euro



Source: VDMA

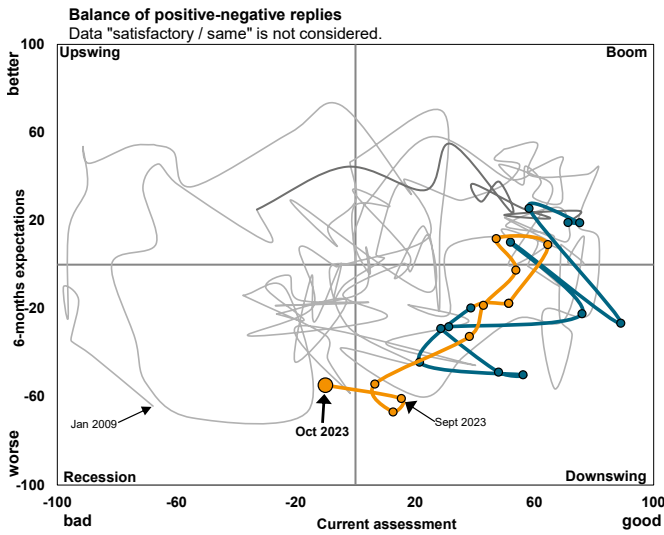
VDMA Fluid Power

Chart 2 | November 2023

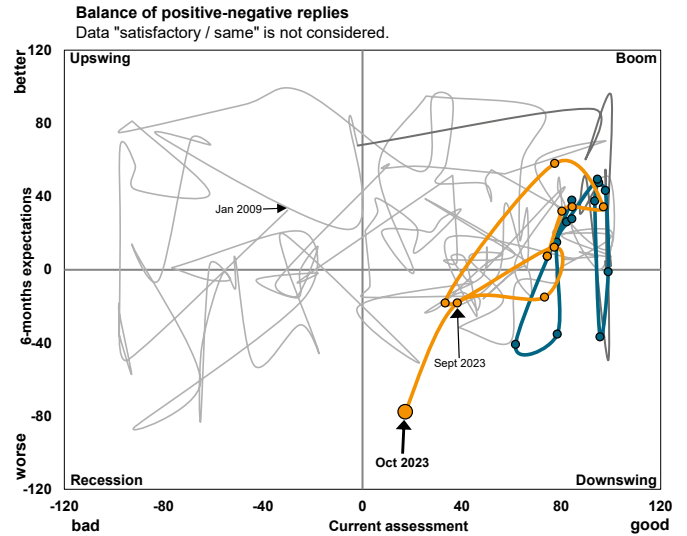
Ifo Business Cycle Clocks Hydraulics and Pneumatics



Hydraulics



Pneumatics



Source: ifo Institute, VDMA

Development in major customer industries in Germany in nominal terms



New orders (recorded trends)		
Customer industries	Jan - Dec 2022/2021	Jan - Sept 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	↑	↓

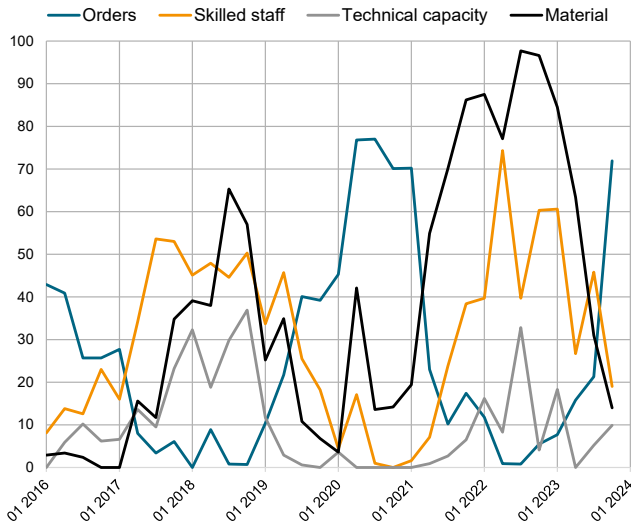
Explanation	
↓ ↓ ↓ ↓ ↓	< -30%
↓ ↓ ↓ ↓ ↓	-30% to -20%
↓ ↓ ↓ ↓ ↓	-20% to -10%
↓ ↓ ↓ ↓ ↓	-10% to -2%
↓ ↓ ↓ ↓ ↓	-2% to +2%
↑	+2% to +10%
↑	+10% to +20%
↑	+20% to +30%
↑	>+30%

Source: German Federal Statistical Office, VDMA

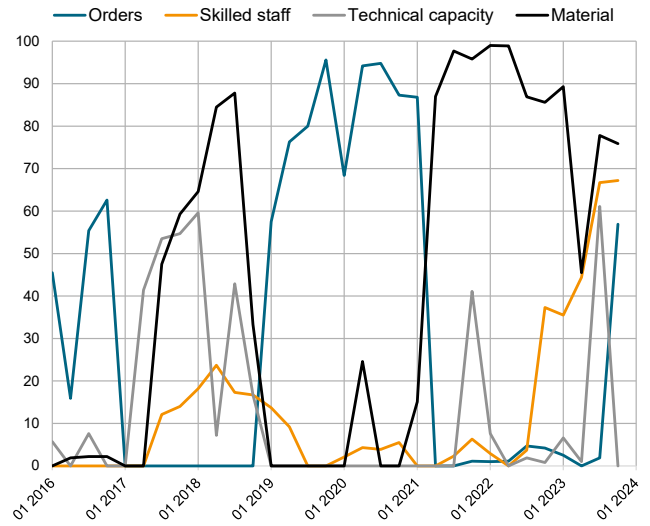
Germany: Limitation of Production in Hydraulics and Pneumatics due to a lack of ...



Hydraulics

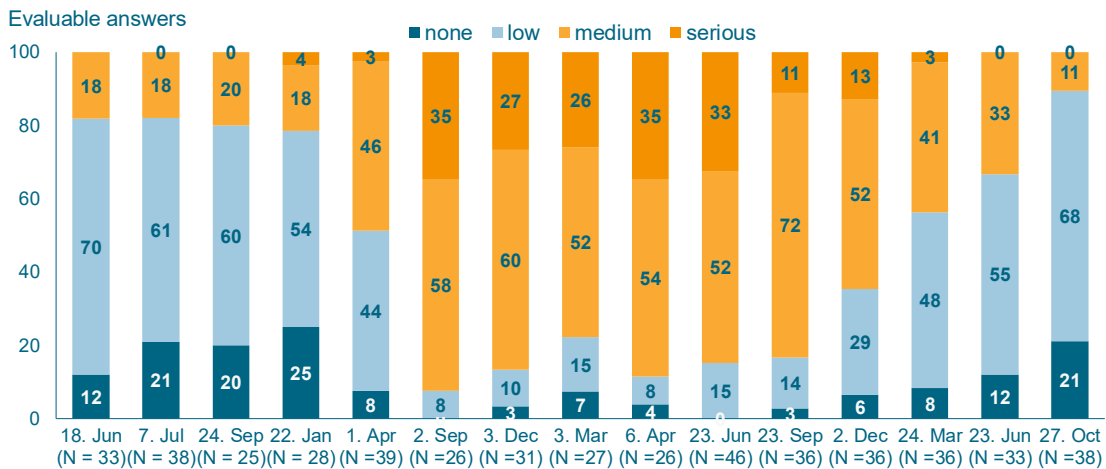


Pneumatics



Source: ifo Institute, VDMA

Fluid Power: Impairments in supply chains

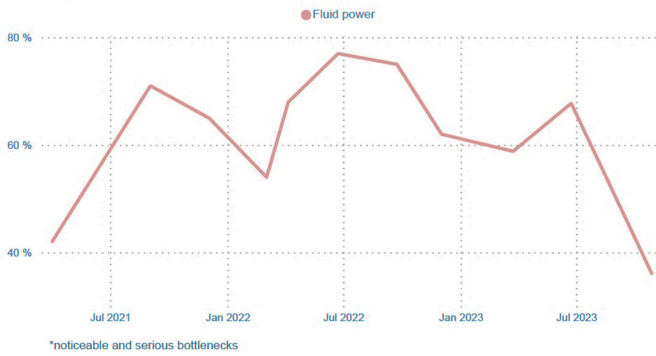


Source: VDMA flash surveys, June 2020 to October 2023

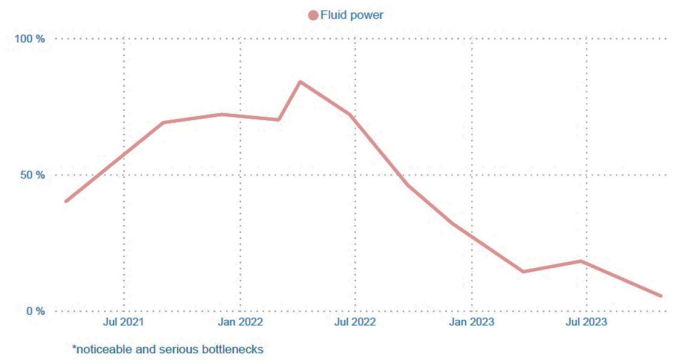
Development of supply bottlenecks in ... 2021 - 2023



Supply Bottlenecks* Electronic Components



Supply Bottlenecks* Metals



Source: 20 VDMA flash survey, Oct 2023

Germany: What is the country market trend?



- **Top 5 trends in your country/region which may have an impact on the economy.**
 - China topic
 - Russia and Israel / Palestine topic
 - Energy topic
 - PFAS topic
 - Increasing Bureaucracy
 - Lack of Skilled Staff in many industries and sectors

**Forecast by the Board of the Fluid Power Association
2024
Fluid Power, Hydraulics and Pneumatics from 15 September 2023
in nominal terms**



	2024
Fluid Power:	- 4 %
Hydraulics:	- 4 %
Pneumatics:	- 4 %

Source: VDMA