



German Fluid Power



The Association – the industry

- » 238 member companies
 - Fluid Power
 - Turnover 2024*: 8.5 Billion Euro
 - » Hydraulics*: 5.5 Billion Euro
 - » Pneumatics*: 3.0 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



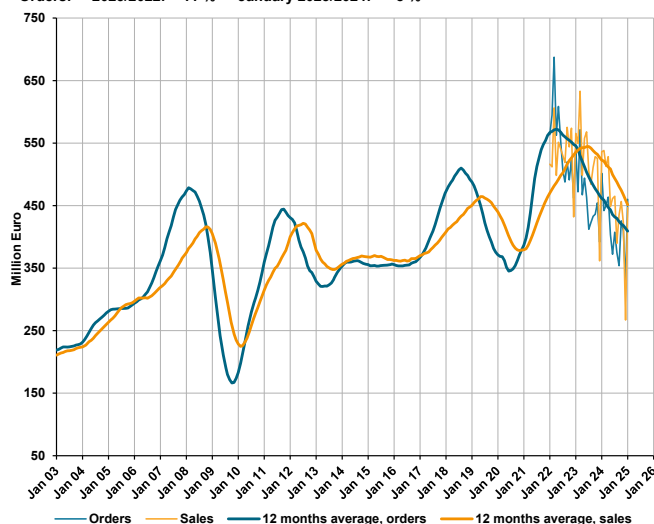
*Turnover in nominal terms

Hydraulics and Pneumatics Sales and Orders in nominal terms



Hydraulics

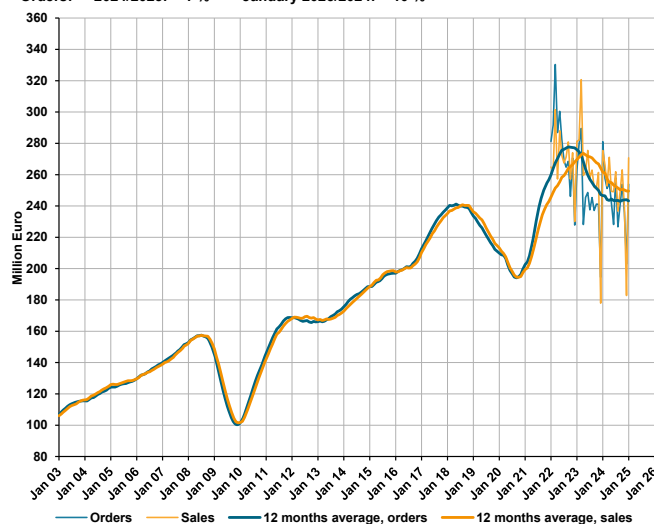
Sales: 2024/2023: -13 % January 2025/2024: -17 % Forecast 2025/2024*: -1 %
 Orders: 2023/2022: -11 % January 2025/2024: -8 %



*Forecasts from December 2024

Pneumatics

Sales: 2024/2023: -5 % January 2025/2024: -2 % Forecast 2025/2024*: -1 %
 Orders: 2024/2023: -1 % January 2025/2024: -10 %



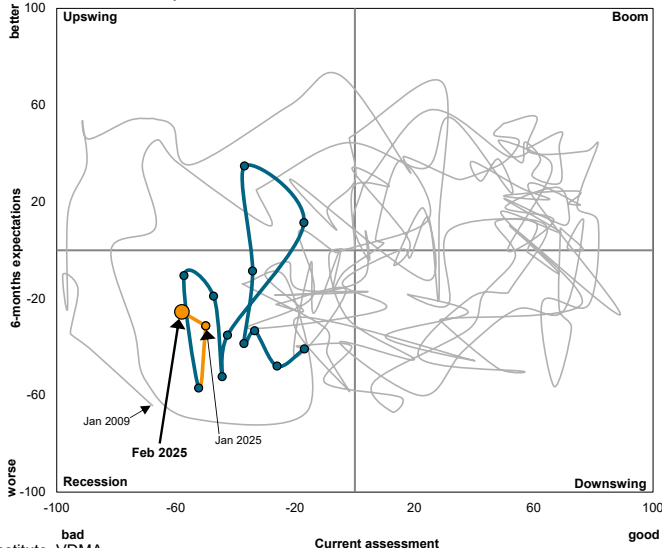
Source: VDMA

Ifo Business Cycle Clocks Hydraulics and Pneumatics



Hydraulics

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



Source: ifo Institute, VDMA

VDMA Fluid Power

Pneumatics

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

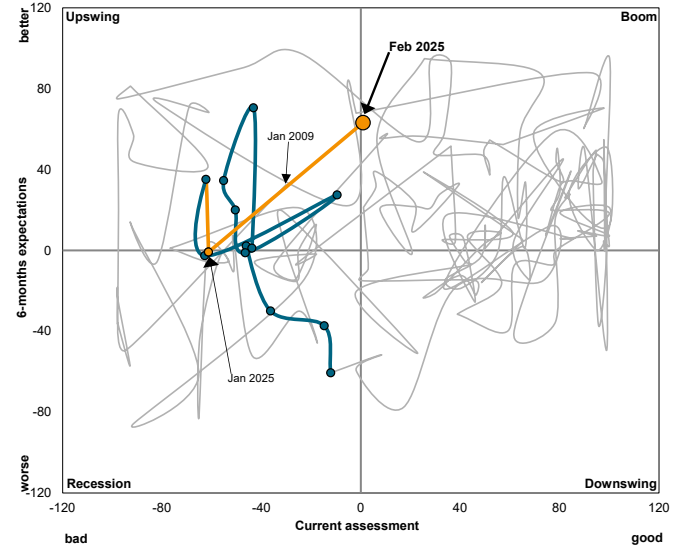


Chart 3 | March 2025

Development in major customer industries in Germany in nominal terms



New orders (recorded trends)		
Customer industries	Jan - Dec 2024/2023	January 2025/2024
Agricultural machinery	↓	↑↑↑
Building material machines	↓	↑
Construction equipment	↓	↑↑↑
Food Processing & packaging machinery	↓	↑
Machine tools	↓	↓
Materials handling technology	↓	↓
Mining & Minerals	↓	↑↑↑
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

VDMA Fluid Power

Chart 4 | March 2025

Forecast by the Board of the Fluid Power Association
for the year 2025
Fluid Power, Hydraulics and Pneumatics of 12 December 2024
in nominal terms



	2025
Fluid Power:	- 1 %
Hydraulics:	- 1 %
Pneumatics:	- 1 %

Source: VDMA