

UK Fluid Power Market Estimates

£ GBP Million	2023	2024	% Change 24/23
Hydraulics*	996.5	868.0 E	-12.9
Pneumatics	226.8	211.4 E	-6.8
Total Fluid Power	1223.3	1079.3 E	-11.8

*Figures relate to components only i.e. excluding market estimates for systems
 E – Estimated at 19.03.25 Final Results for 2024 not yet available

Source: BFPA Annual Surveys ESTIMATED

www.bfpa.co.uk

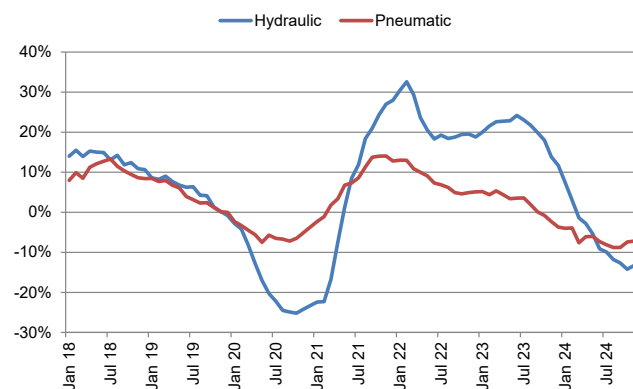
Trends in UK Hydraulics and Pneumatics to December 2024

Hydraulics

Sales: Jan–Dec 2024/2023: -12.9% **Orders:** Jan–Dec 2024/2023: -9.7%
Sales: Jan–Dec 2023/2022: +11.7% **Orders:** Jan–Dec 2024/2023: 0.0%

Pneumatics

Sales: Jan–Dec 2024/2023: -6.8%
Sales: Jan–Dec 2023/2022: -3.7%



Source: BFPA Monthly Surveys 2018=100

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Current Issues Facing BFPA Members (March 2025)

Positives

- Inflation at 2.5%, expected to rise in Q2 to 3.0%
- Interest rates reduced to 4.5%
- UK manufacturing output improved 0.7% Q4 2024
- Lead-times and supply chain improving

Challenges

- Inflation expected to increase to 3.5-4% through 2025 (BoE)
- UK GDP expected to drop back to 0.0%
- Interest rates not expected to reduce further due to economic pressures
- Ongoing conflicts Russia/Ukraine, Israel & Hamas
- Energy costs increasing despite wholesale reductions
- Political uncertainty UK Labour taxation & Trump impact
- Lack of clarity on PFAS & CBAM