

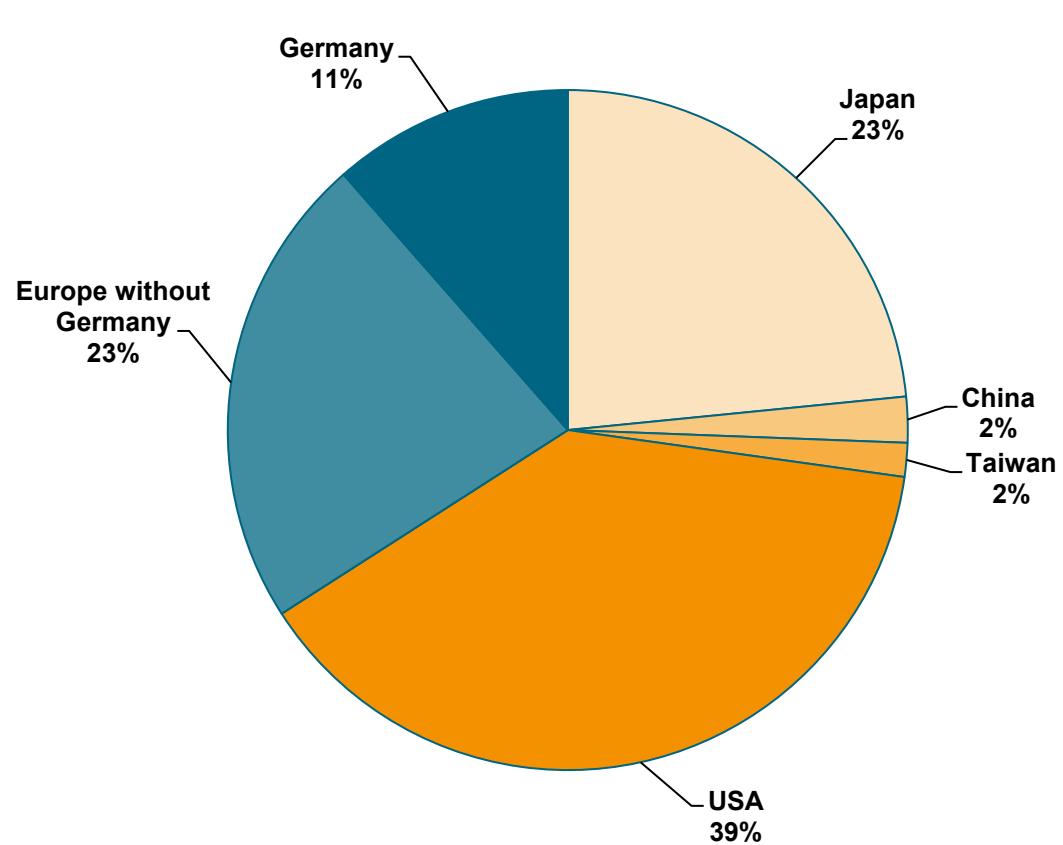
7.1 Economic matters

- CETOP/ISC Statistics
- Macroeconomic Overview
- CETOP Market Outlook Web Conferences

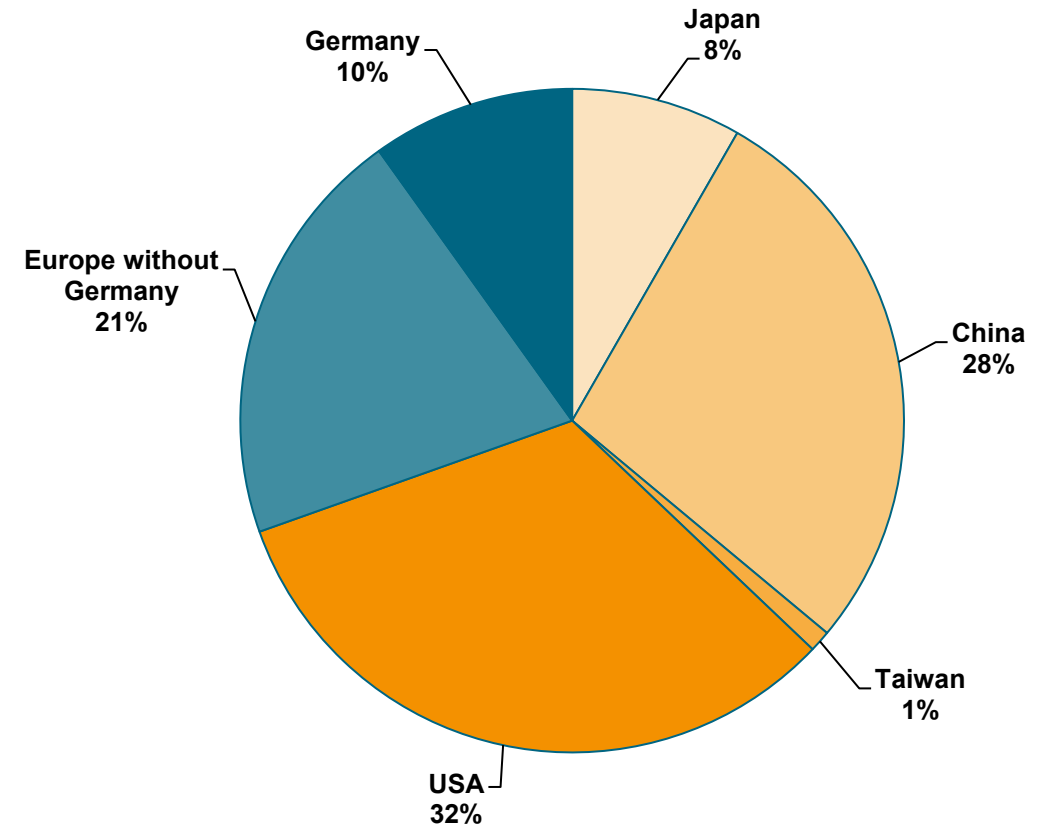
ISC Statistics: National Home Sales - global

Fluid Power Comparison 2000 to 2019

Total 2000 (estimated): 25.7 Billion Euro

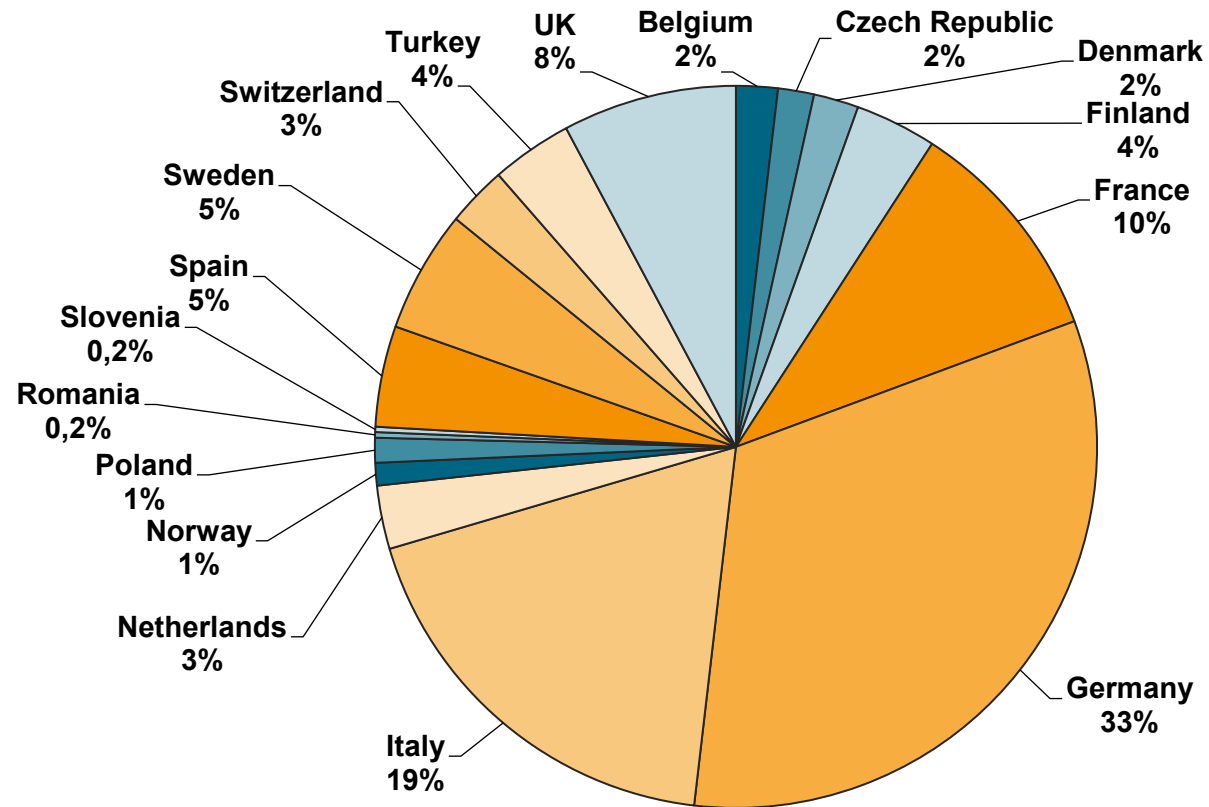


Total 2019 (estimated): 46.3 Billion Euro



CETOP Statistics: National Home Sales - Europe

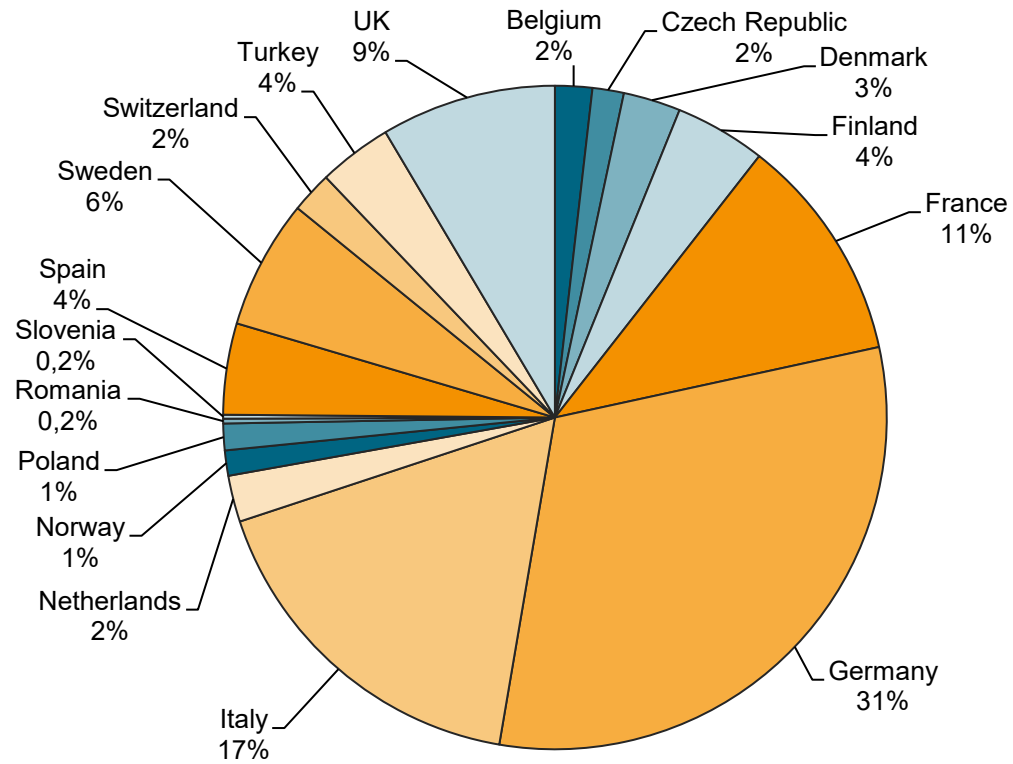
Fluid Power 2019 (estimated): 14.1 Billion Euro



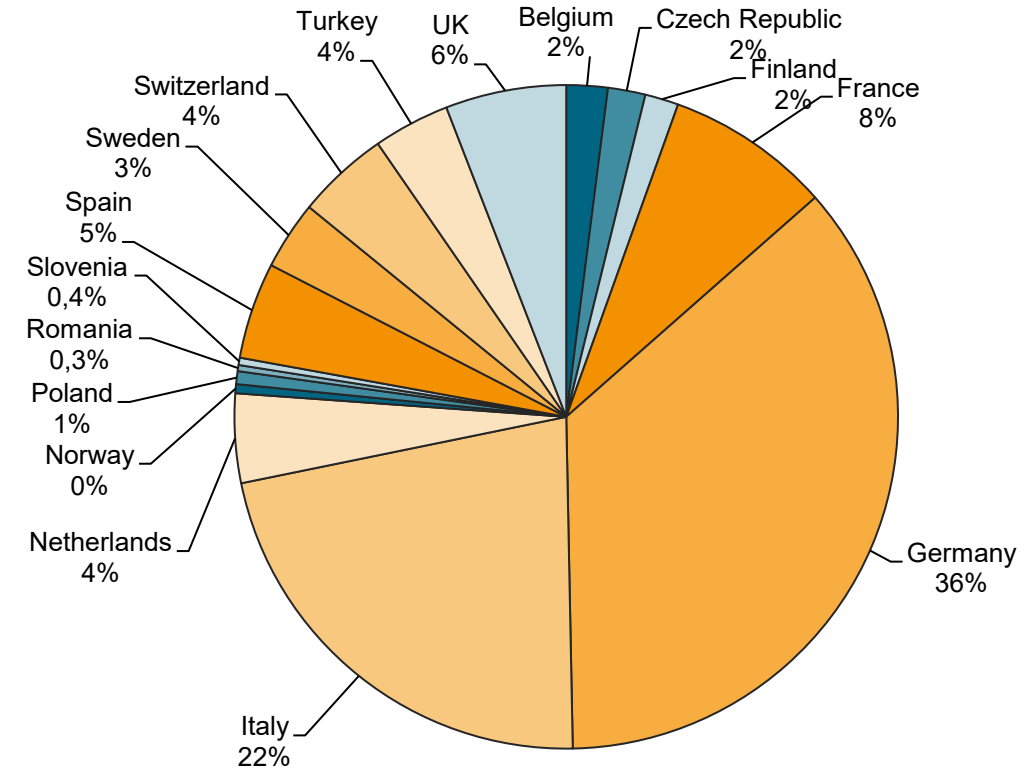
CETOP Statistics: National Home Sales - Europe

Hydraulics and Pneumatics Countries 2019 (estimated):

Hydraulics (estimated): 10.2 Billion Euro



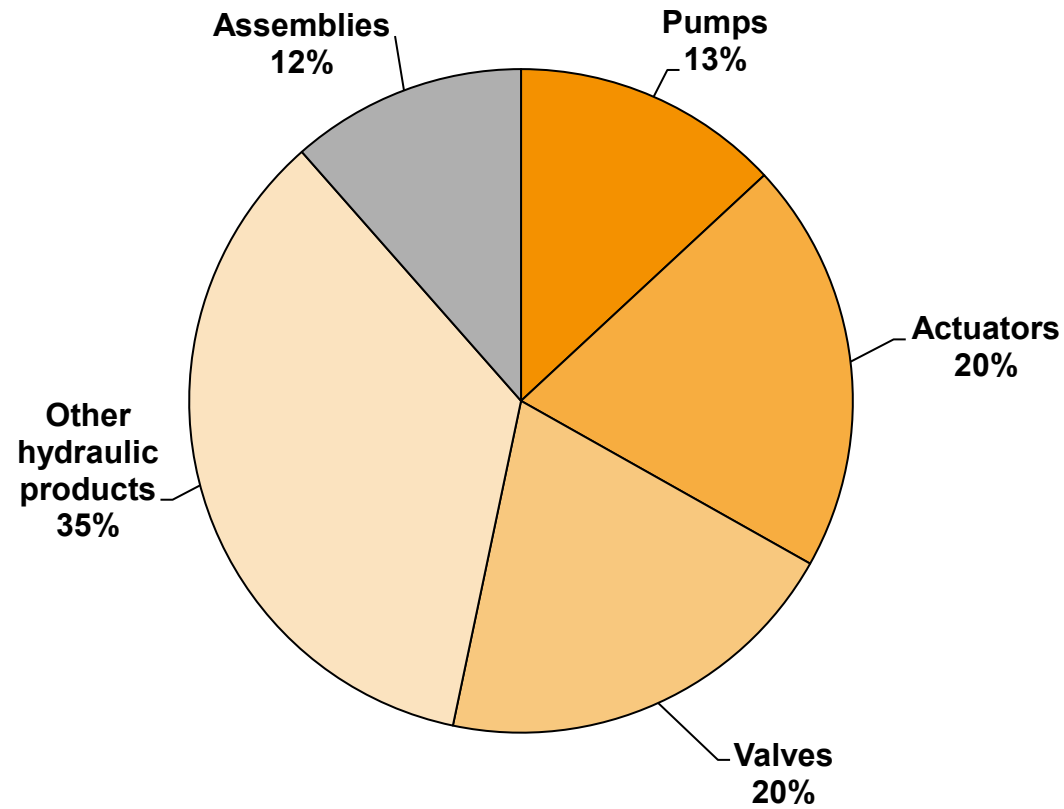
Pneumatics (estimated): 3.9 Billion Euro



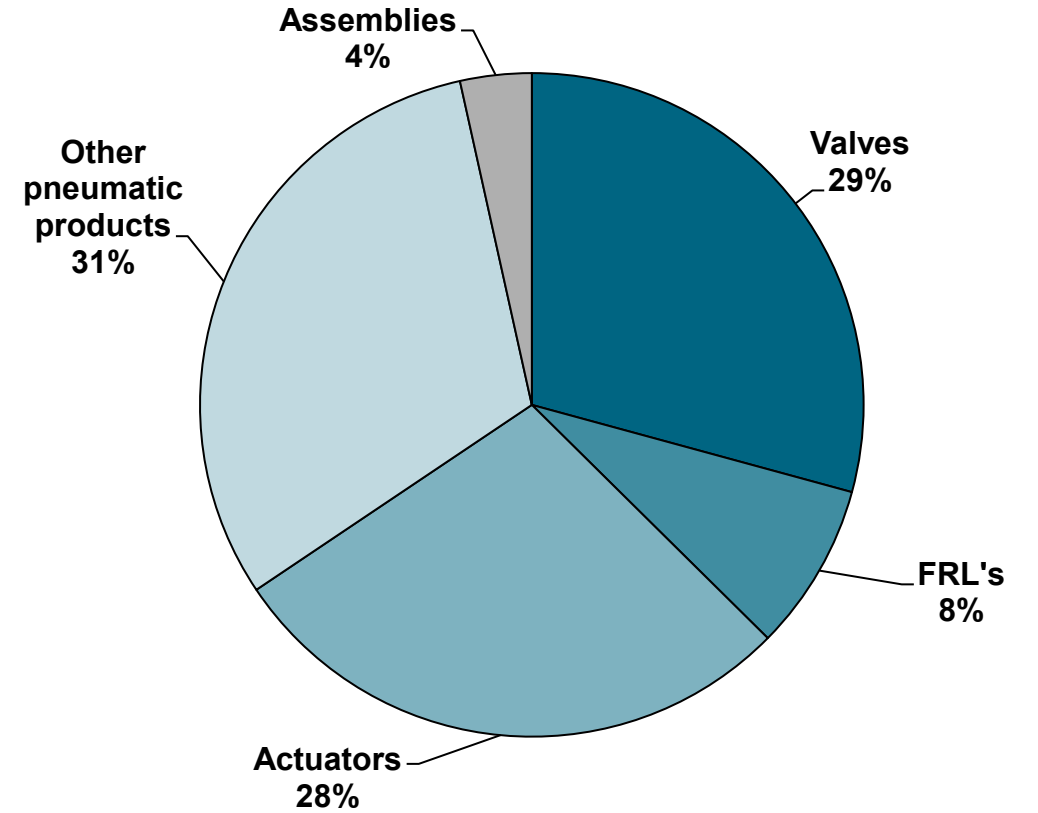
CETOP Statistics: National Home Sales - Europe

Hydraulics and Pneumatics Products 2019 (estimated):

Hydraulics (estimated): 10.2 Billion Euro



Pneumatics (estimated): 3.9 Billion Euro



Countries:

Germany	Belgium
Italy	UK
Spain	France
Sweden	
Turkey	

These countries in 2019:

79% of Home Market Hydraulic

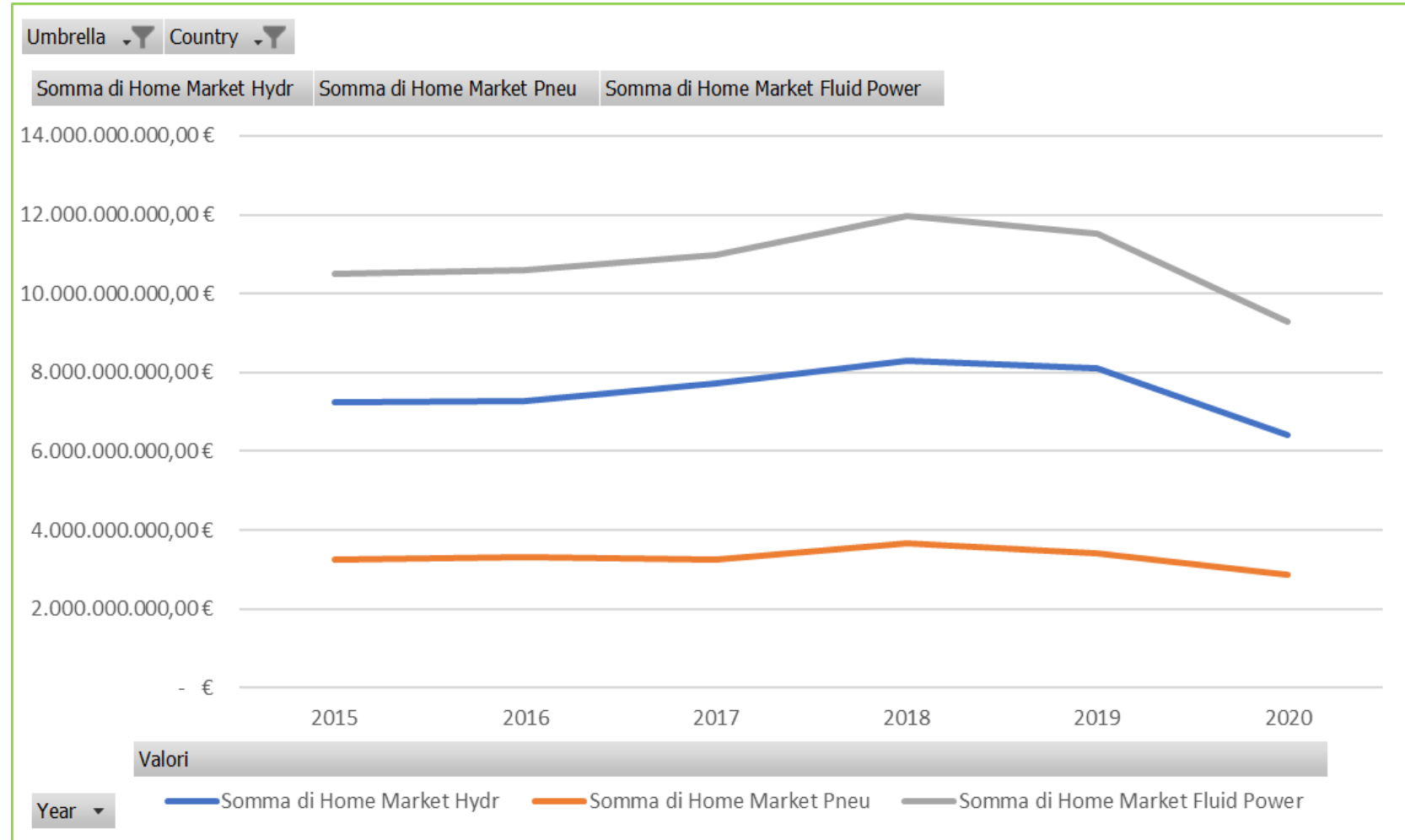
87% of Home Market Pneumatic

Estimation Home Market 2020:

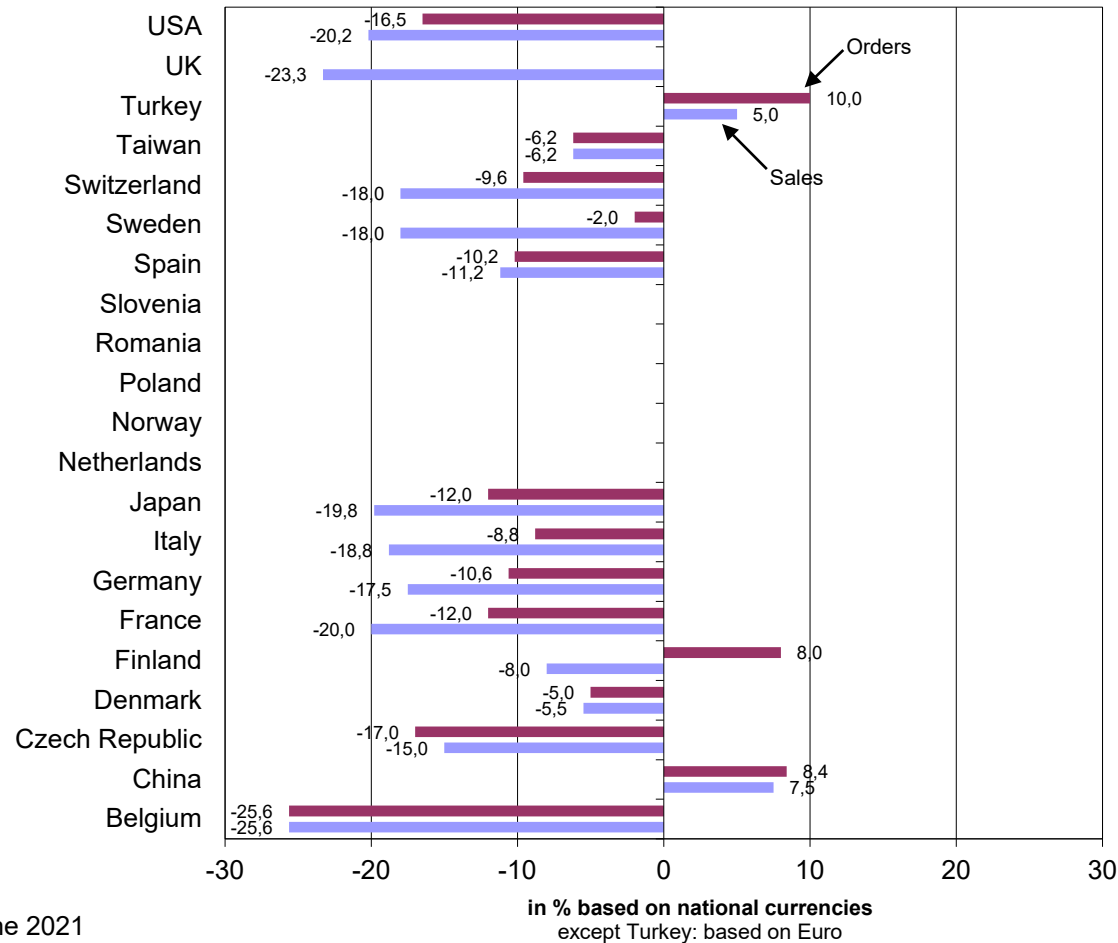
Hydraulic **8.2 B€**

Pneumatic **3.2 B€**

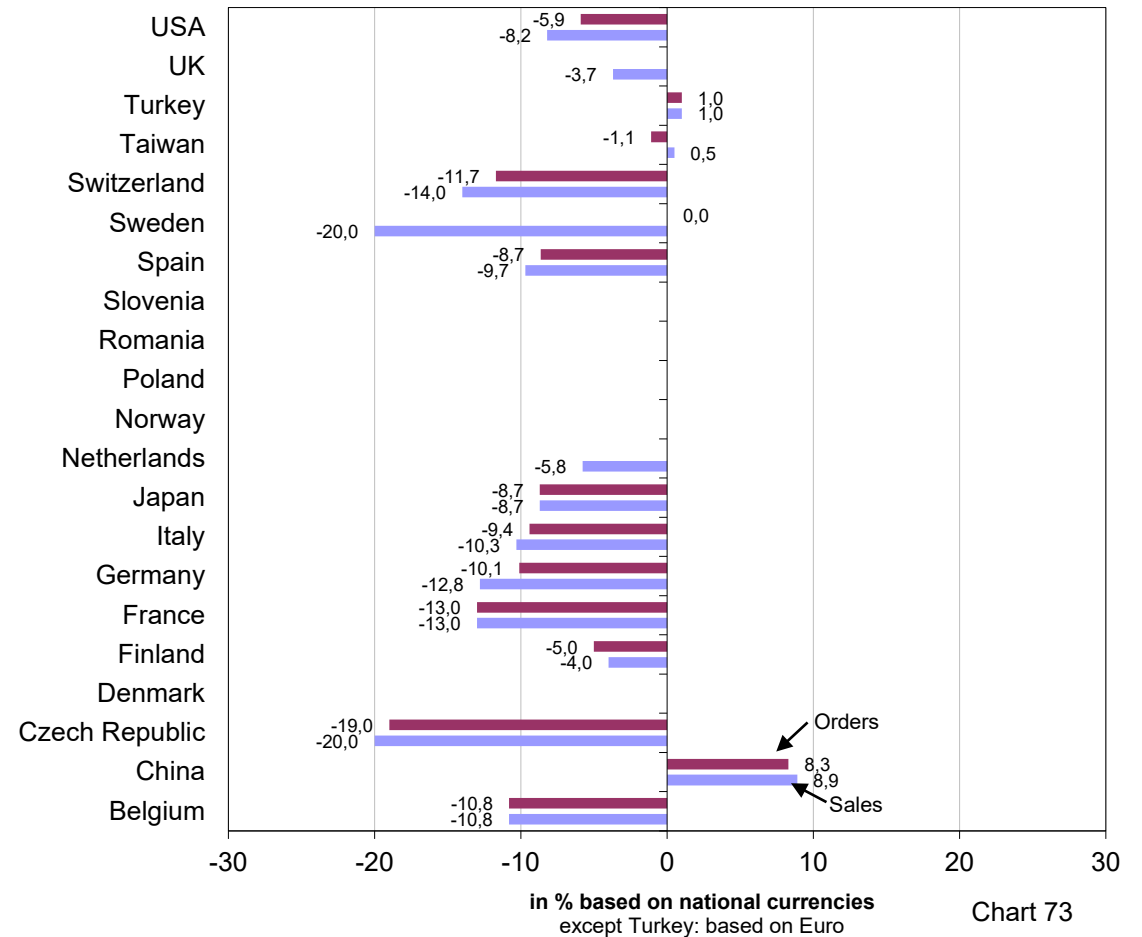
Fluid Power **11.4 B€**



- Hydraulics Orders and Sales Changes Jan-Dec 2020/2019 in %
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2020

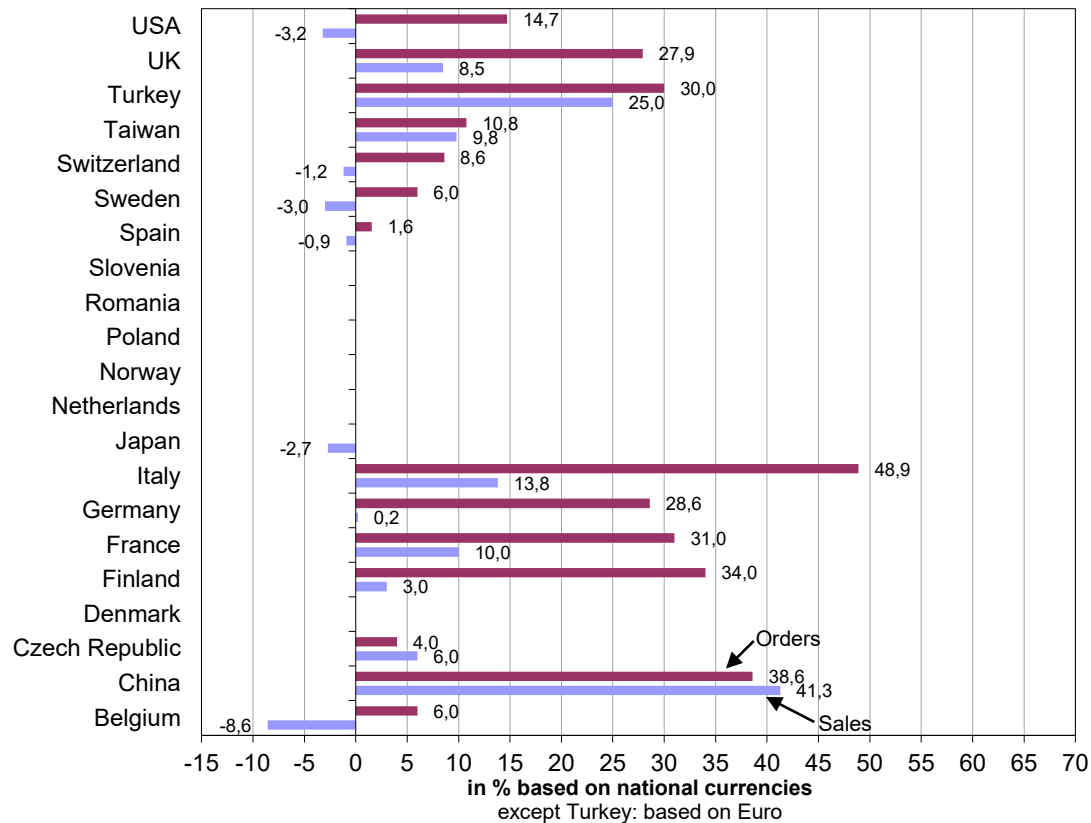


- Pneumatics Orders and Sales Changes Jan-Dec 2020/2019 in %
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2020



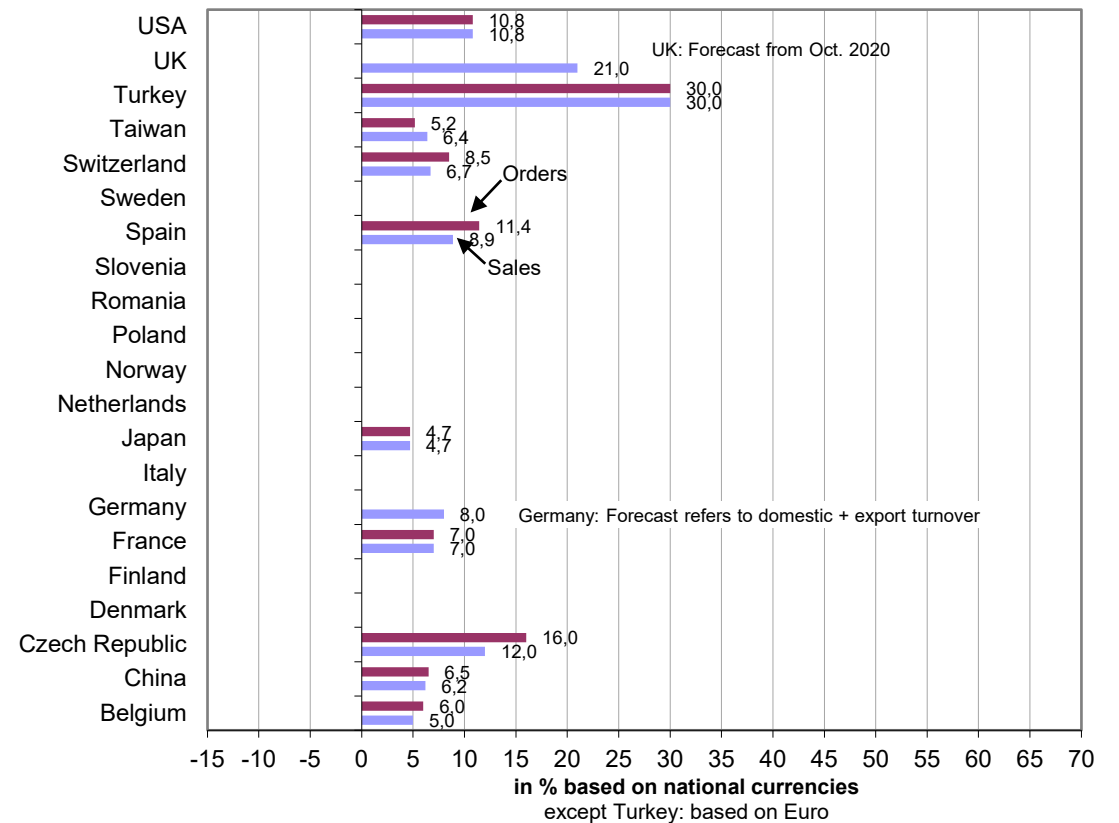
Hydraulics Orders and Sales

Changes Jan-March 2021/Jan-March 2020
CETOP/ISC Quarterly Trend Survey 1 Quarter 2021



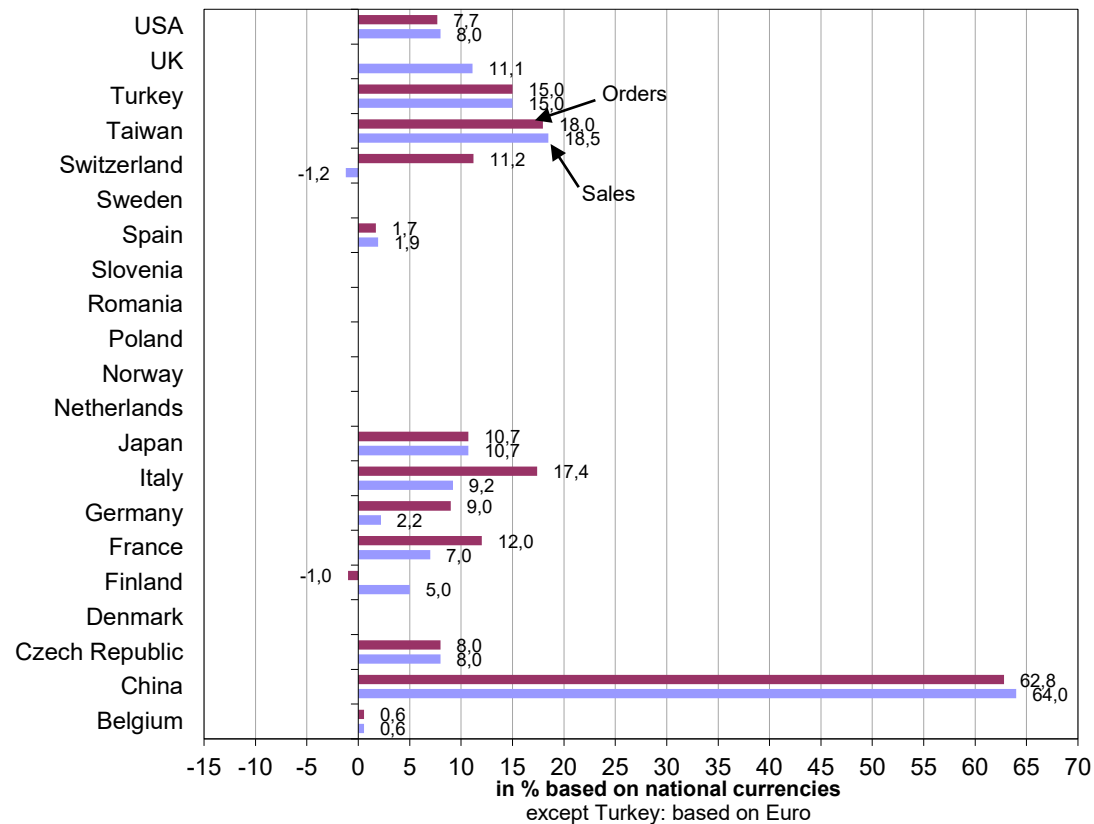
Hydraulics Orders and Sales

Forecast 2021/2020
CETOP/ISC Quarterly Trend Survey 1 Quarter 2021



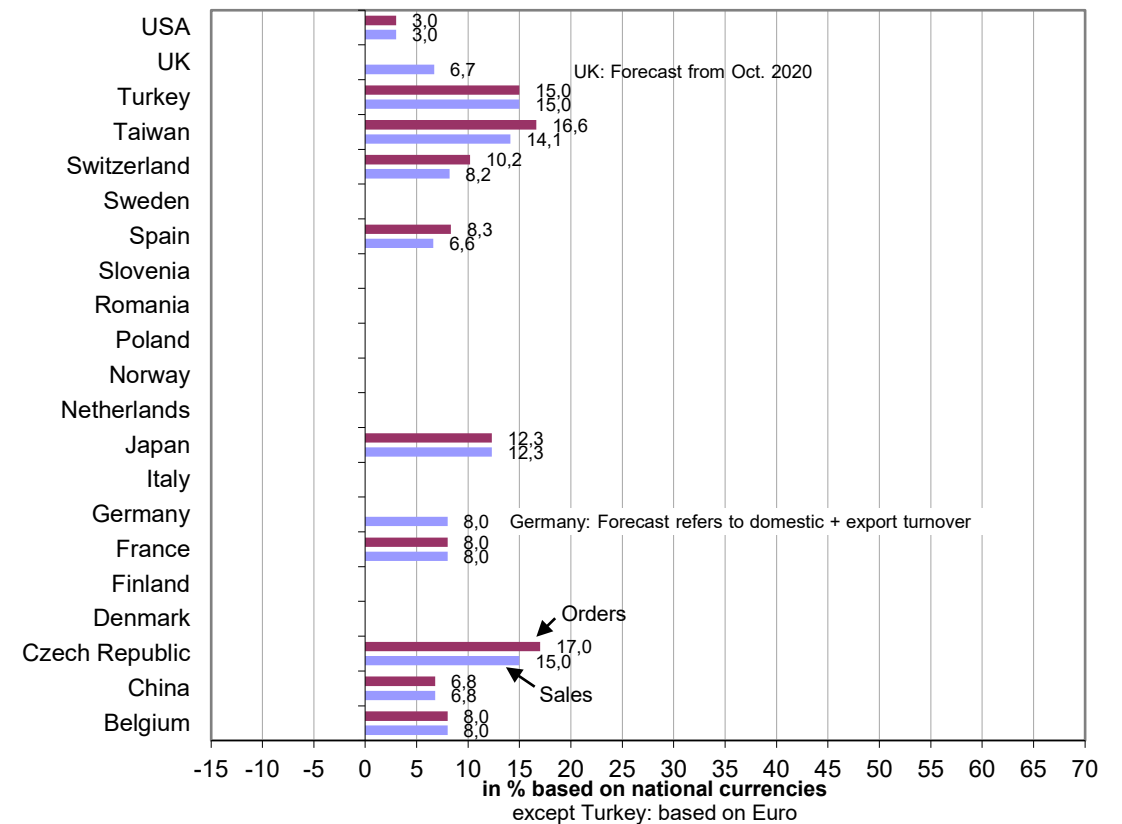
Pneumatic Orders and Sales

Changes Jan-March 2021/Jan-March 2020
CETOP/ISC Quarterly Trend Survey 1 Quarter 2021



Pneumatic Orders and Sales

Forecast 2021/2020
CETOP/ISC Quarterly Trend Survey 1 Quarter 2021



Excerpt from CETOP/ISC Monthly exchange on tendencies, April 2021

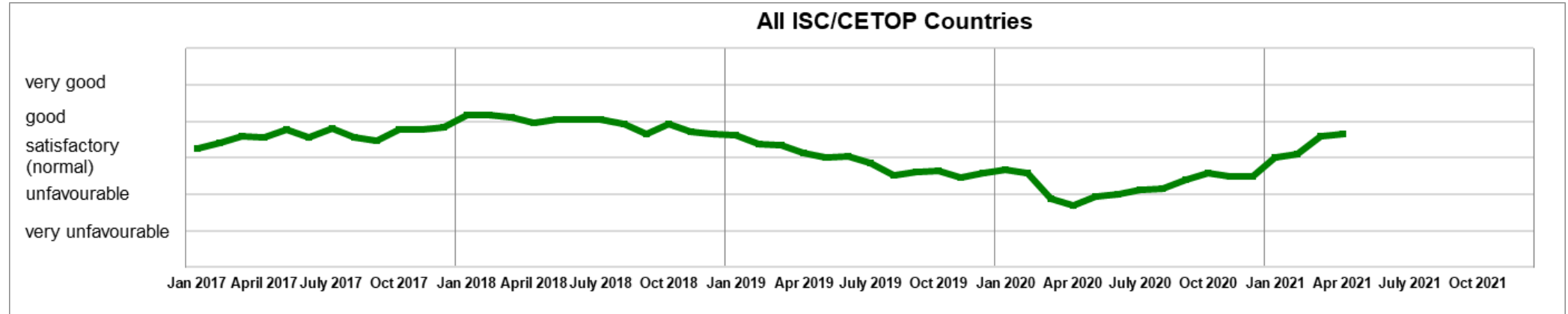
3. New orders (compared to previous month)

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

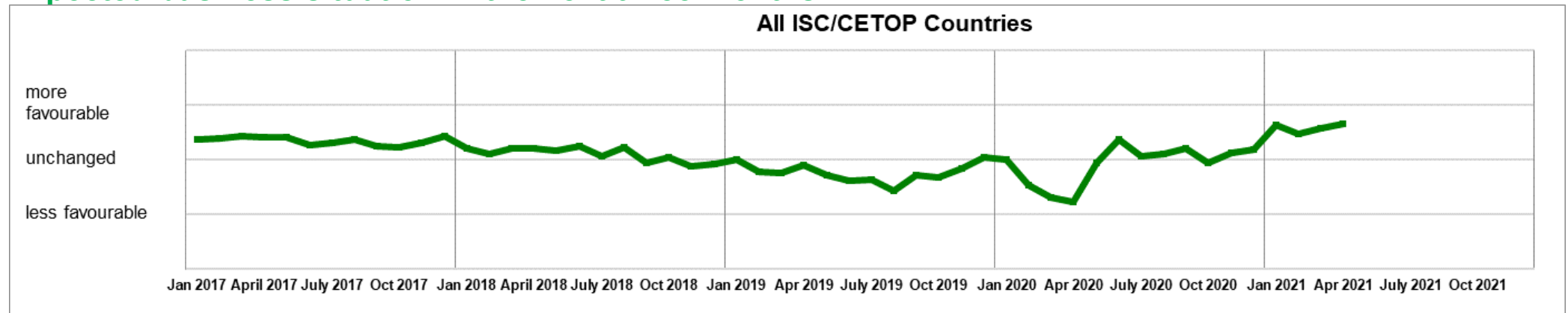
5. Expected business situation (in the next 3 months)

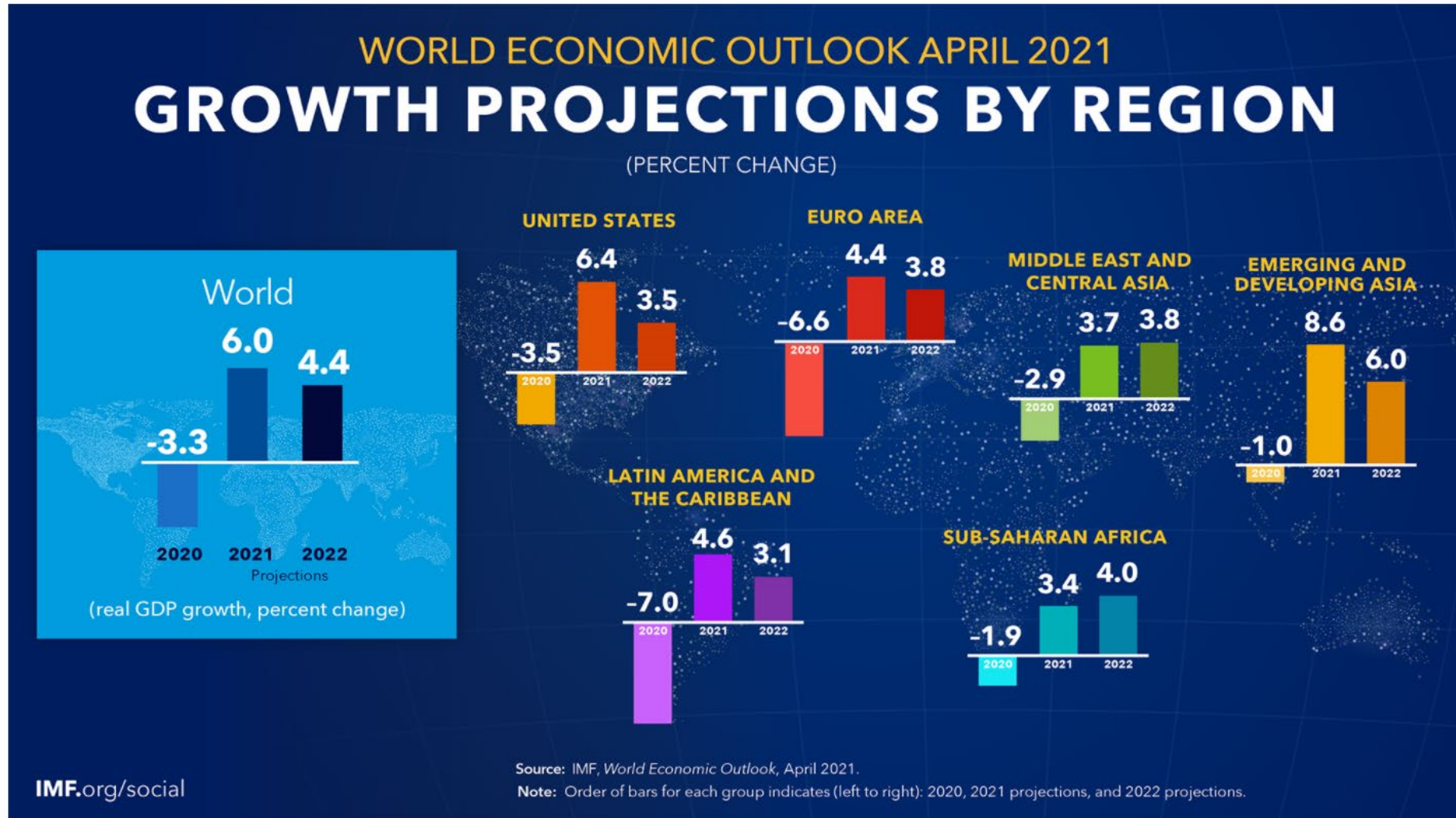
COUNTRIES	B	CH	CZ	D	DK	E	F	FIN	I	J	NL	S	SLO	TR	UK	USA	VRC
more favourable																	
unchanged																	
less favourable																	

Business climate



Expected business situation in the next three months

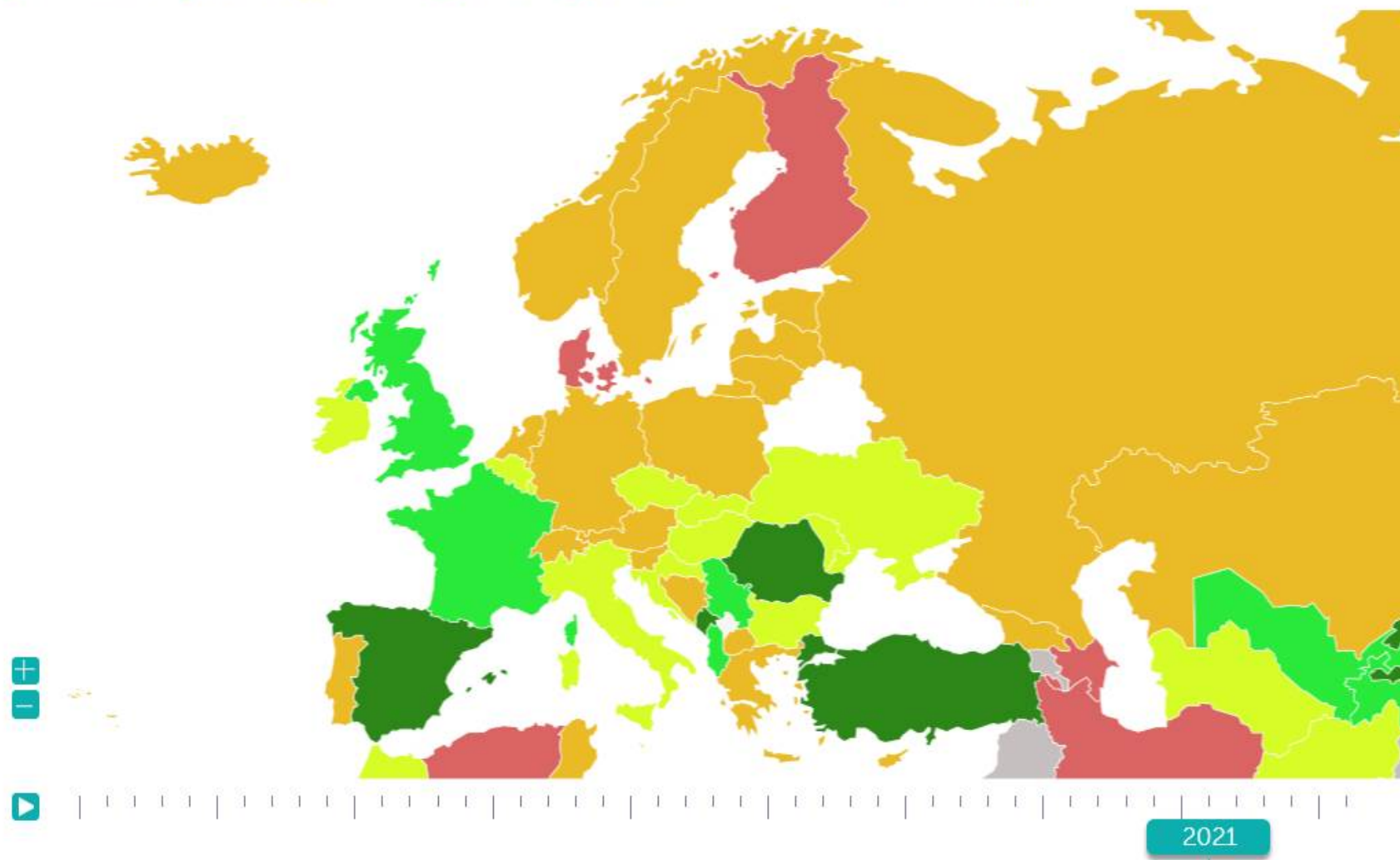




IMF Economic Statistics

Real GDP Growth (WEO April 2021)

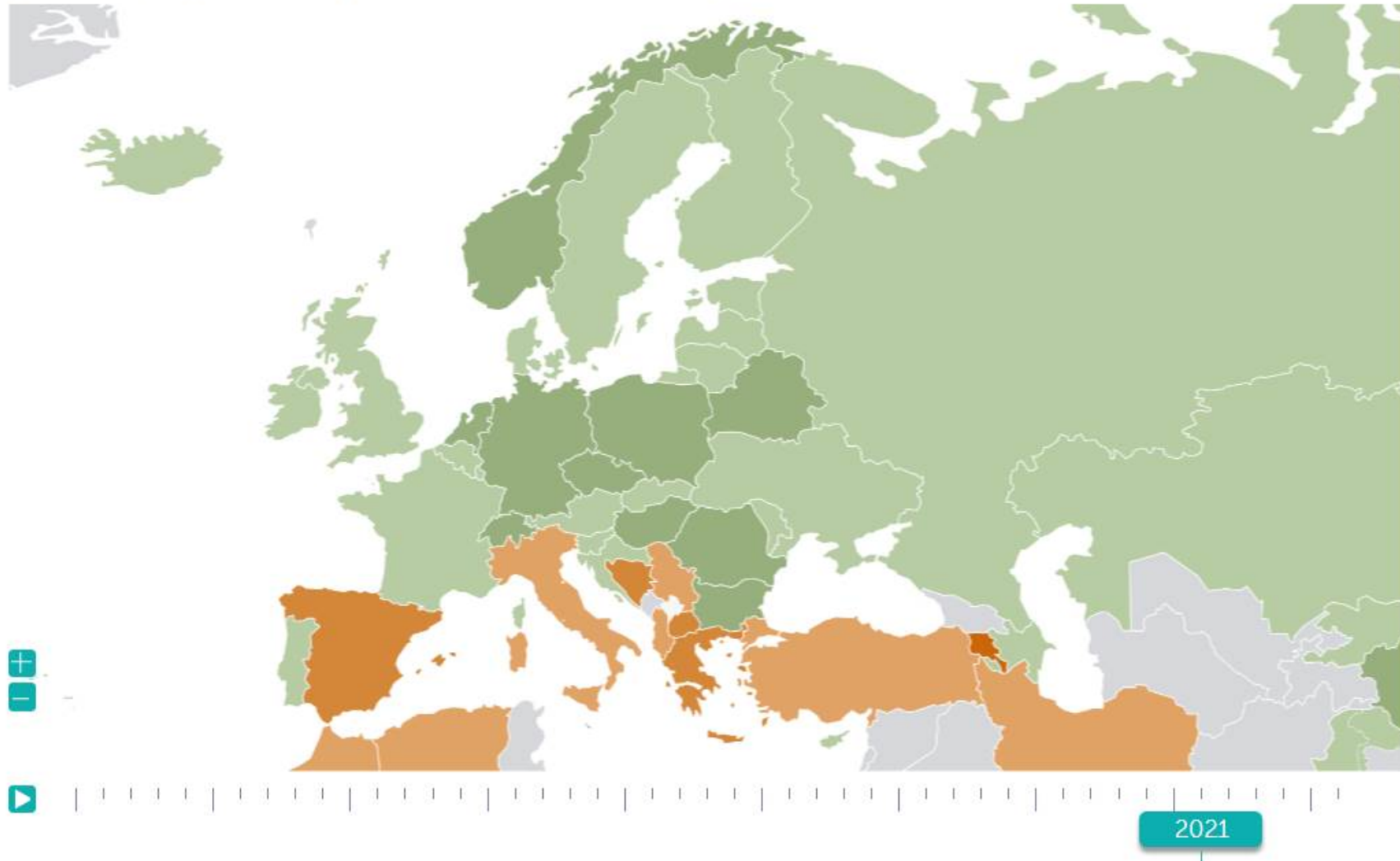
● 6% or more ● 5% - 6% ● 4% - 5% ● 3% - 4% ● 2% - 3% ● 1% - 2% ● 0% - 1% no data



IMF Economic Statistics

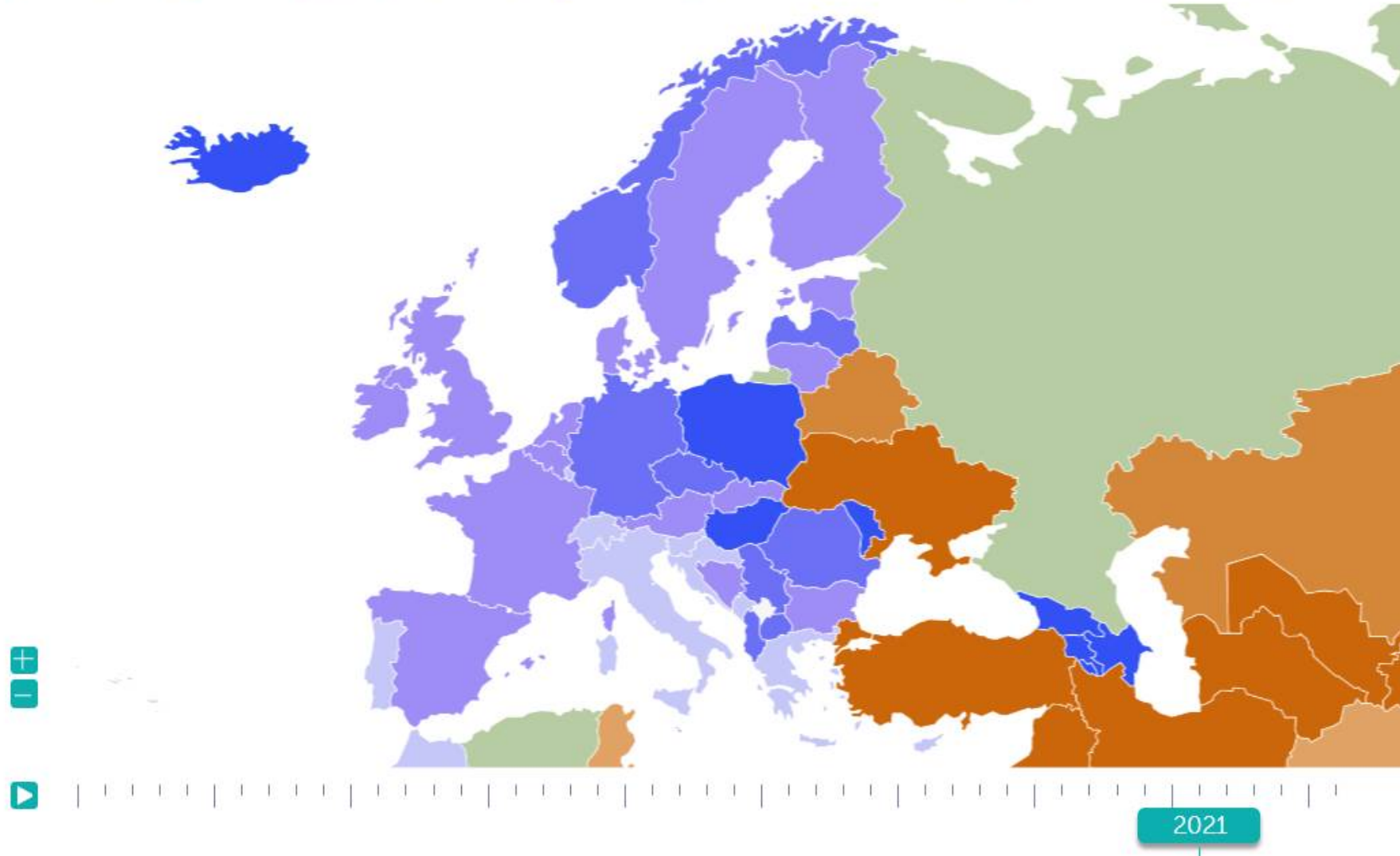
Un-employment (WEO April 2021)

● 20% or more ● 15% - 20% ● 10% - 15% ● 5% - 10% ● Less than 5% ● no data



IMF Economic Statistics Inflation (WEO April 2021)

● 7% or more
 ● 6% - 7%
 ● 5% - 6%
 ● 4% - 5%
 ● 3% - 4%
 ● 2% - 3%
 ● 1% - 2%
 ● 0% - 1%
 ● less than 0%
 no data



CETOP country data

GDP constant price

BI, billion €

Variable	2020	2021
Belgium	416	432
Czech Rep.	195	204
France	2,133	2,257
Germany	3,074	3,185
Italy	1,573	1,638
Netherlands	727	752
Norway	351	364
Poland	468	484
Spain	1,063	1,131
Sweden	484	499
Switzerland	644	666
Turkye	172	182
United Kingdom	2,276	2,397

IMF | 2020, 2021

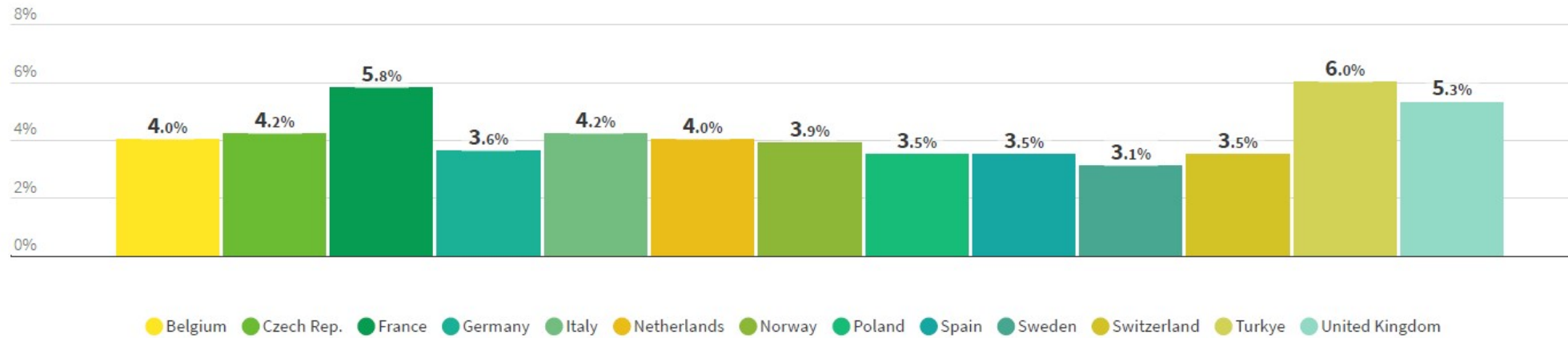
GDP current price

BI, billion €

Variable	2020	2021
Belgium	450	475
Czech Rep.	220	230
France	2,277	2,412
Germany	3,322	3,545
Italy	1,652	1,729
Netherlands	797	831
Norway	336	375
Poland	520	558
Spain	2,318	2,490
Sweden	491	515
Switzerland	638	662
Turkye	481	574
United Kingdom	2,457	2,614

IMF | 2020, 2021

GDP constant price growth



IMF | 2021

Market Outlook Web Conferences

Sept 2020

Feb 2021

(2 events; 32 participants ; 15 associations)

Oxford Economics Statistics

Macroeconomic Data

Collection of CETOP data using Web Portal

<https://www.ntgt.de/a/s.aspx?s=415325X8795&t=1>

	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>	31/03/2022	1 month later	1 month later
<i>Quarter 1 to 2</i>	31/05/2022		
<i>Quarter 1 to 3</i>	30/09/2022		
<i>Quarter 1 to 4</i>	16/12/2022		
Annual Product Statistics	31/03/2022	1 month later	1 month later

7.2 Education matters

- Review of the CETOP Approved Centre Guidelines and its appendix
- Coming review; include/merge the Recommendation for Fluid Power Electronics 1 into the Level 2 and 3 Hydraulic and Pneumatic Recommendations

7.3 Marketing and Communication matters

- Website
- Idea of organising a CETOP event
- CETOP Directory

7.4 Technical matters

European directive survey

- ✓ Reach and the SCIP database
- ✓ ROHS
- ✓ Machine directive
- ✓ Eco design
- ✓ Pressure directive



Position papers

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



Technical trends

- ✓ **New : Electrification : Survey and intervention**
- ✓ **Project: Ask a customer sector to come and:**
 - Talk about the regulations that affect them and which can have an impact on fluid power,
 - Give us the major technological trends in progress