



Germany: Economic Situation

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CETOP General Assembly
10 June 2021, Web conference

The Association – the industry

- » 215 member companies
- » Turnover: 7.0 Billion Euro
 - Hydraulics: 4.6 Billion Euro
 - Pneumatics: 2.4 Billion Euro
- » Export ratio: 60%
- » The member companies represent about 85% of the German Fluid Power market
- » Member of CETOP, the European umbrella association for Fluid Power
 - President: Stefan König, Danfoss, Germany
 - General Secretariat: Fluid Power Association within VDMA, Germany
- » Member of ISC - International Fluidpower Statistics Committee
 - ISC Chairman: Amadio Bolzani, Italy
 - ISC Secretary: Sylvia Grohmann-Mundschenk, Germany

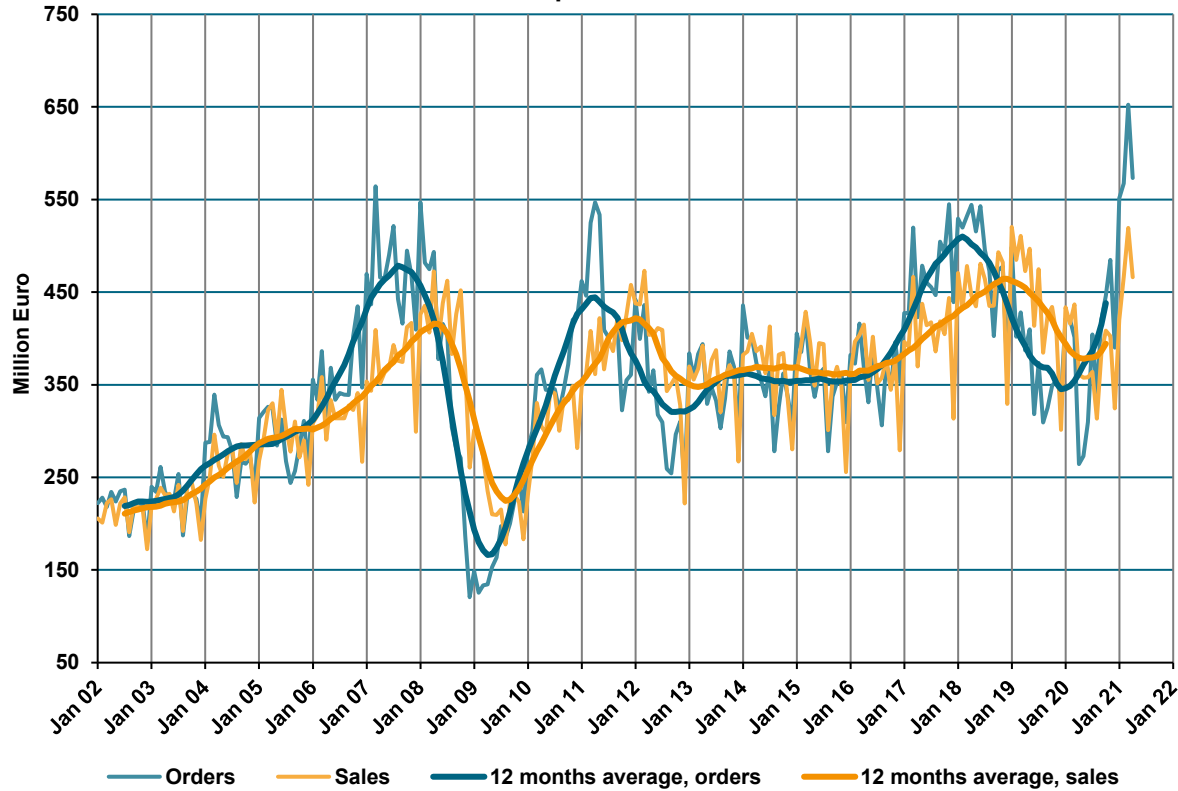


Hydraulics and Pneumatics Sales and Orders



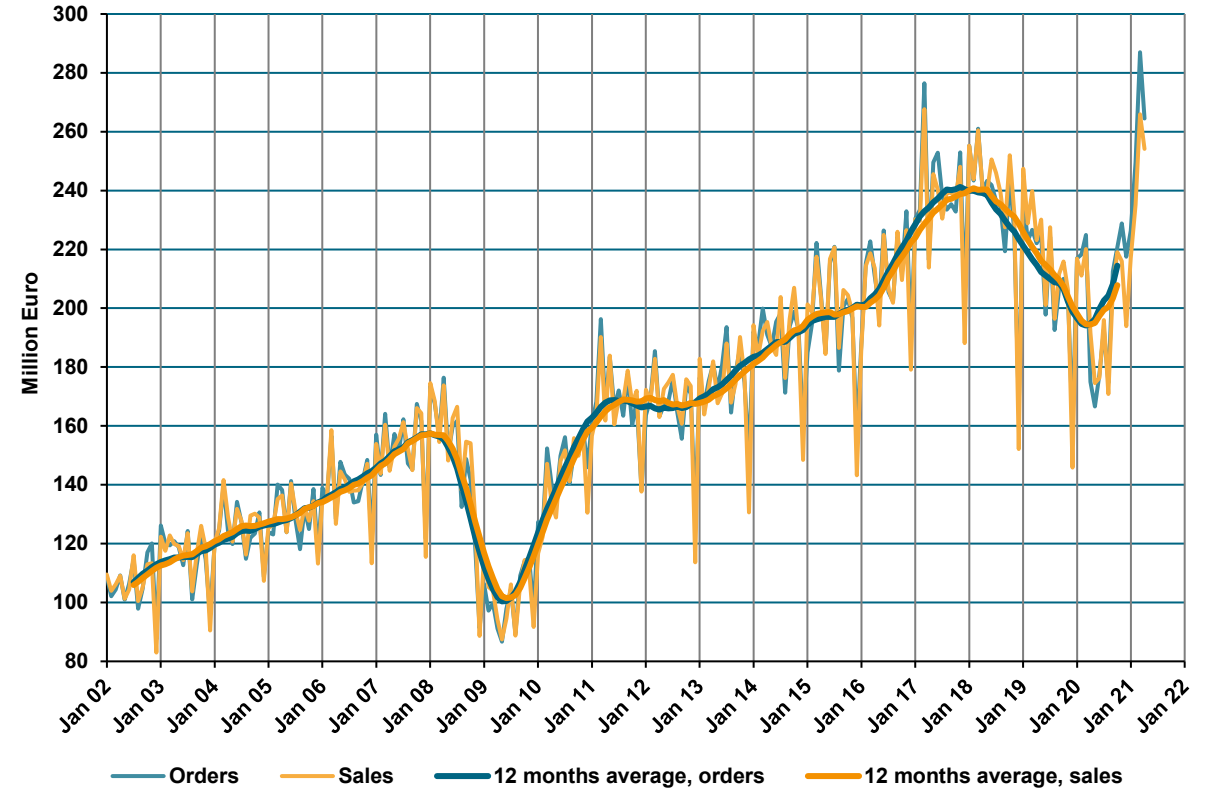
Hydraulics

Sales: 2020/2019: -14 % Jan. -Apr. 2021/2020: +14 % Forecast 2021*: +8 %
 Orders: 2020/2019: +2 % Jan. -Apr. 2021/2020: +56 %



Pneumatics

Sales: 2020/2019: -7 % Jan. -Apr. 2021/2020: +16 % Forecast 2021*: +8 %
 Orders: 2020/2019: -4 % Jan. -Apr. 2021/2020: +23 %



Source: VDMA

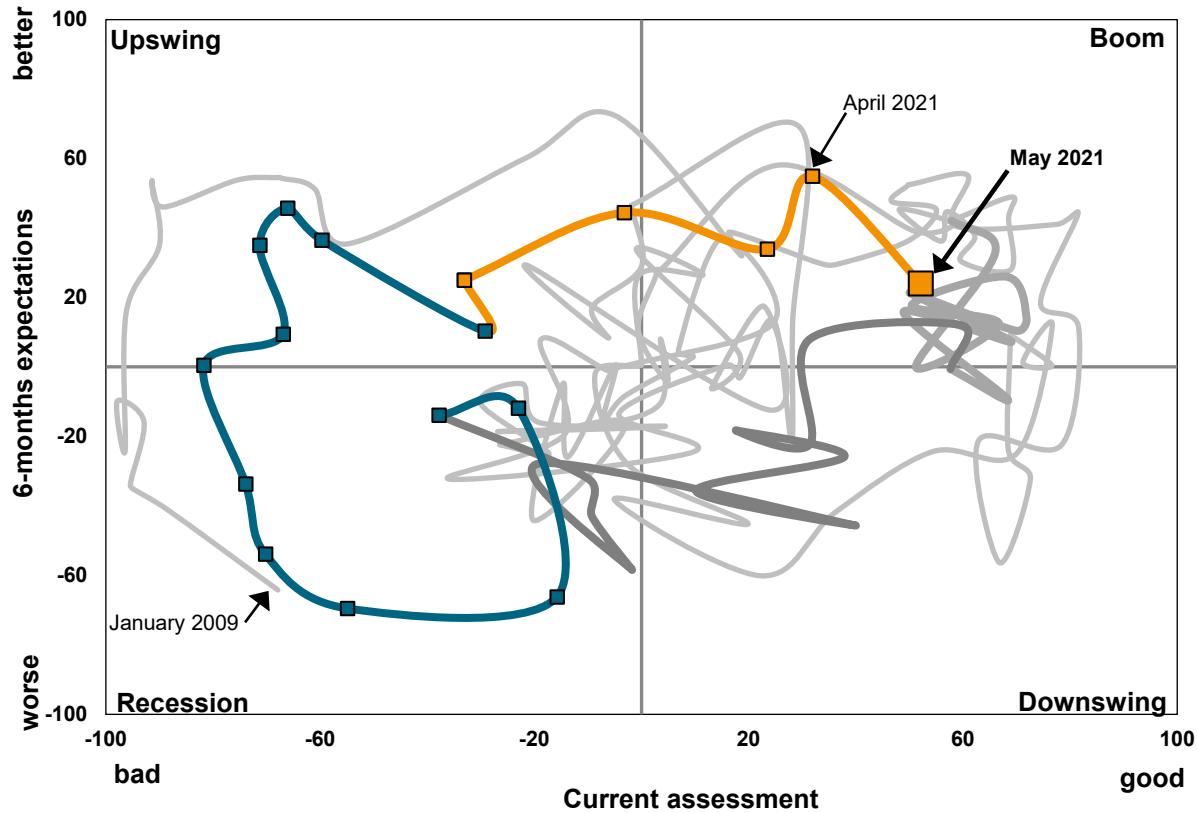
*Forecasts from 9 April 2021

Ifo Business Cycle Clocks Hydraulics and Pneumatics



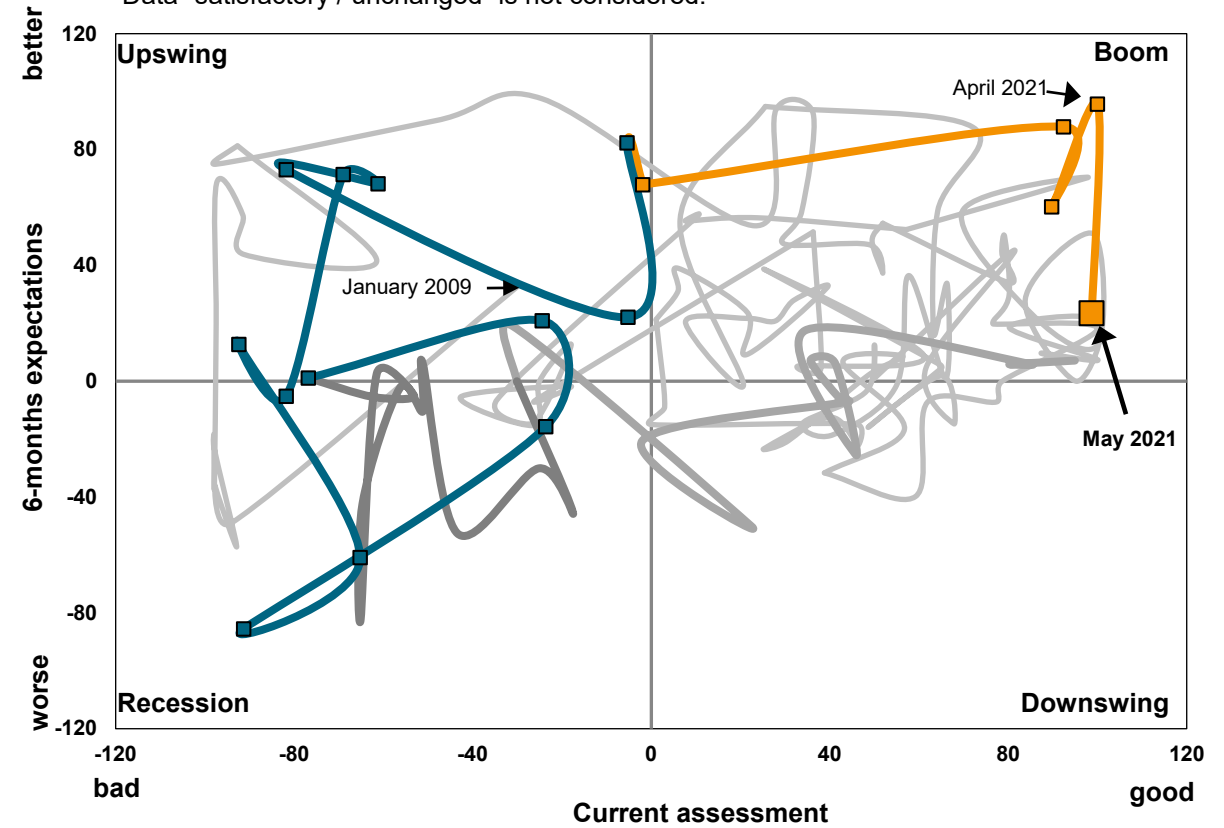
Hydraulics

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



Pneumatics

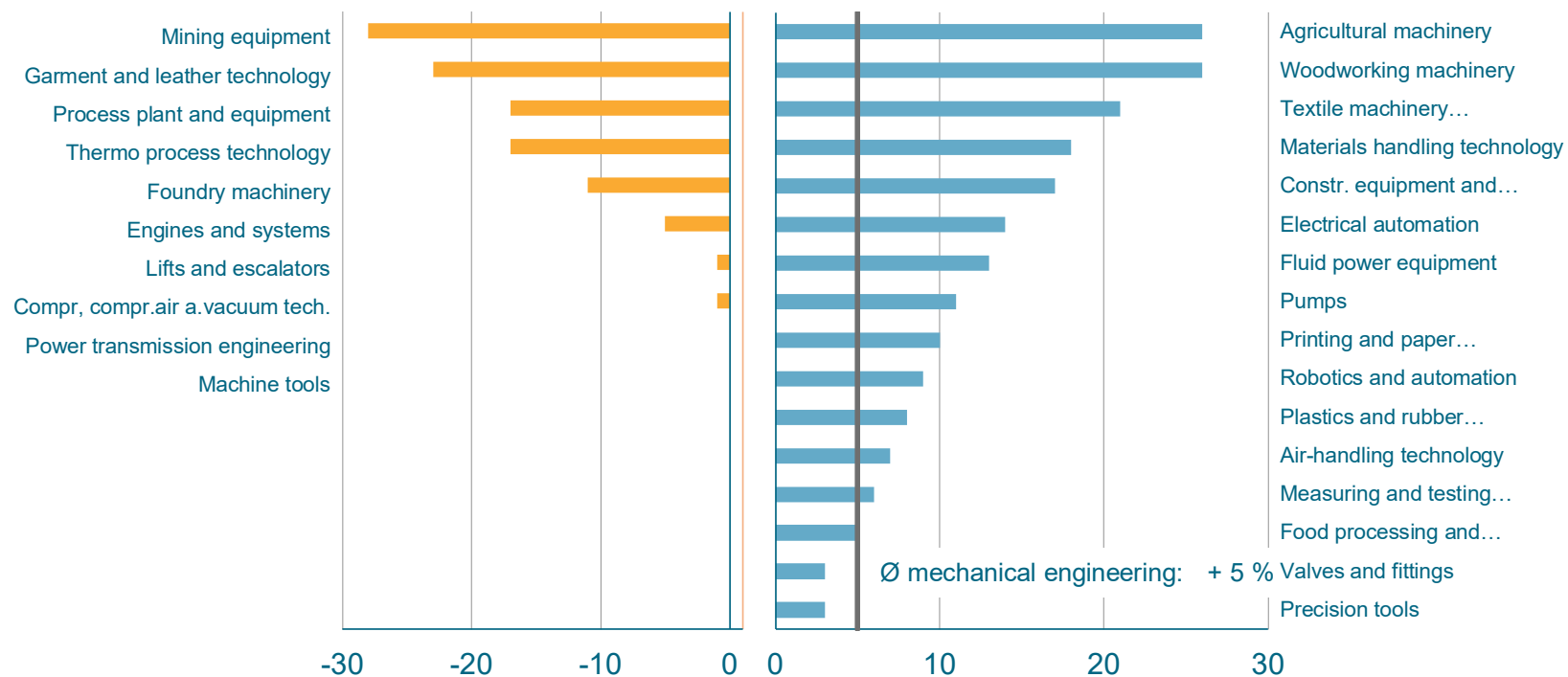
Balance of positive-negative replies
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Source: ifo Institute, VDMA

Germany: Turnover in selected subsectors mechanical engineering

% , yoy, real, Jan.-April 2021/2020

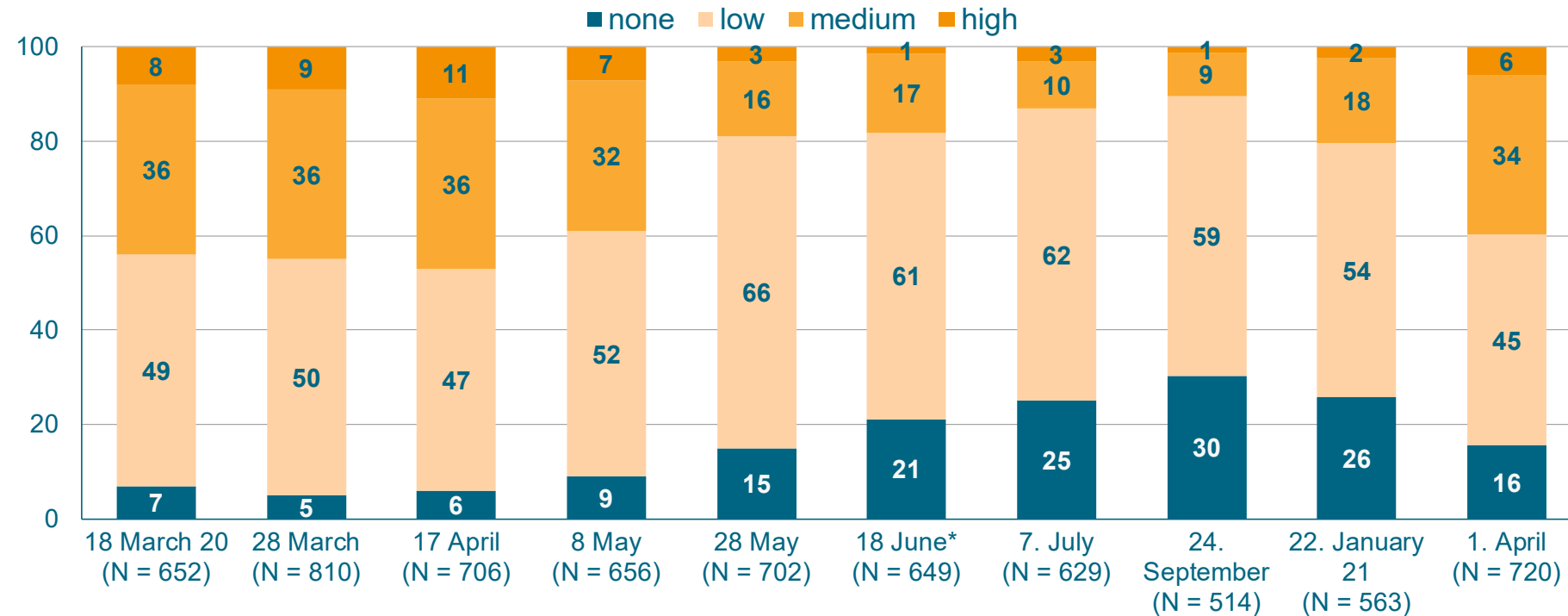


Source: VDMA

Disruptions in the supply chains



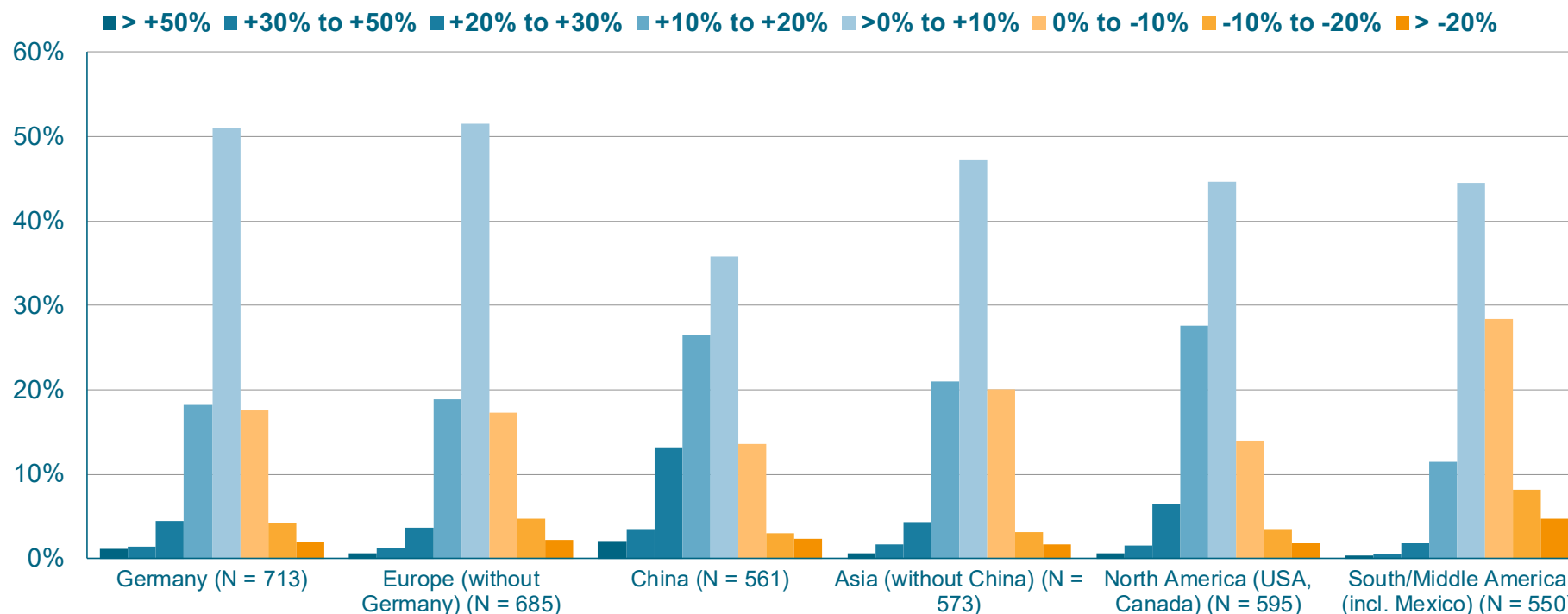
in per cent of the evaluable answers



*limited comparability with previous surveys due to changed questioning
 Source: VDMA, flash surveys on coronavirus, March 2020 to April 2021

Expected turnover development on sales markets in 2021 compared with the previous year

Evaluable answers in per cent

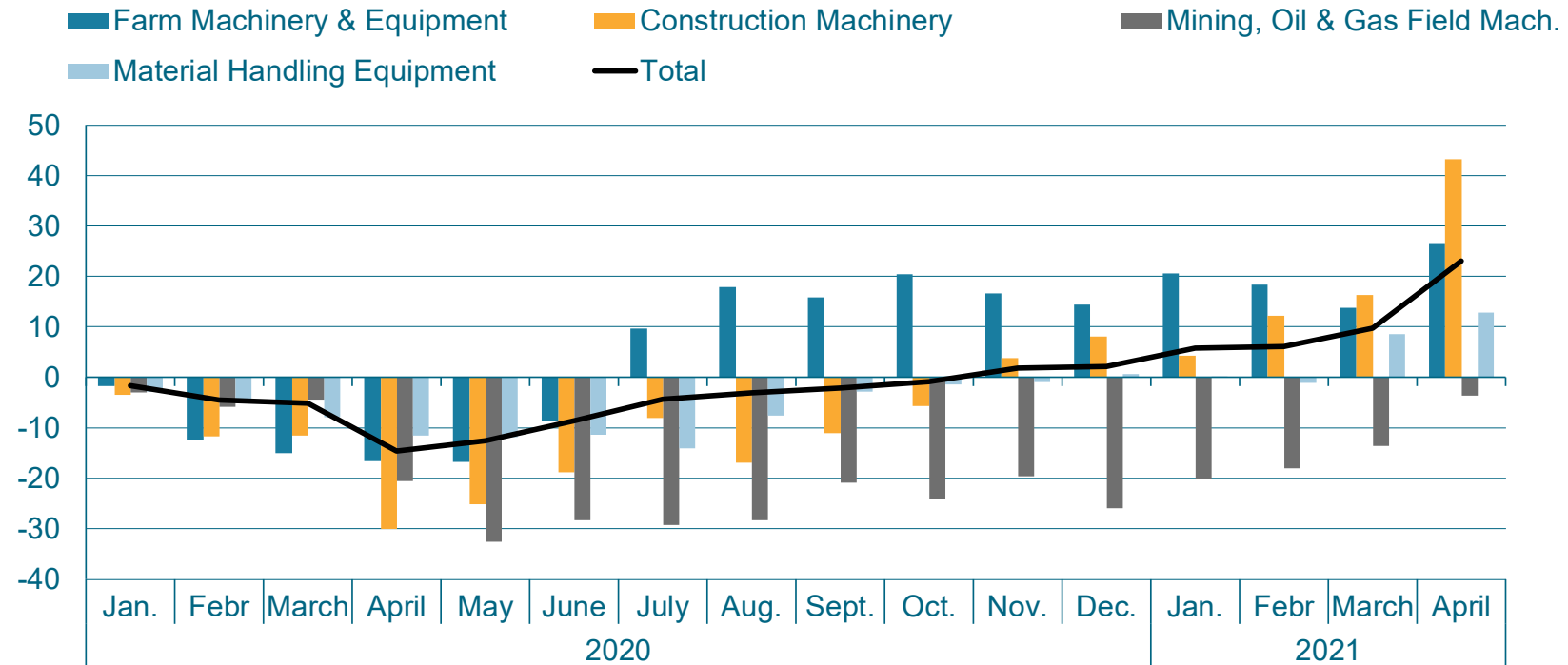


source: VDMA, 10th flash survey on coronavirus, 1 April 2021

United States: Value of Shipments Selected machinery sectors



%, yoy



Source: US Census, Macrobond