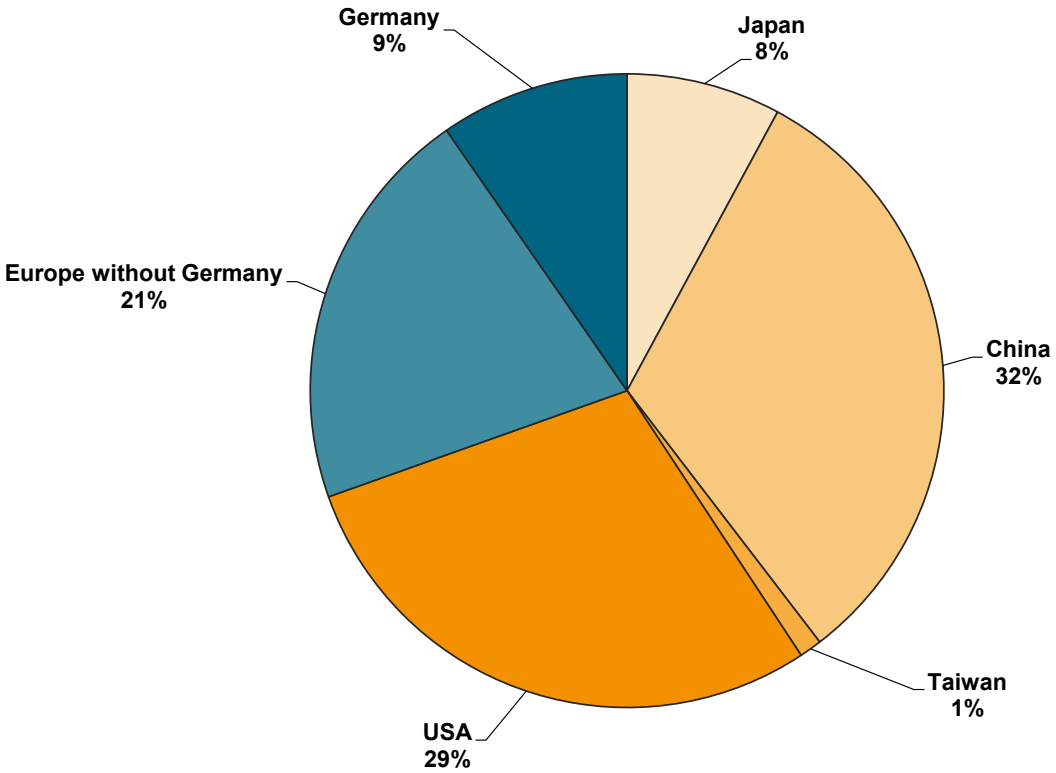
6.1 CETOP Economic matters

- CETOP/ISC Statistics

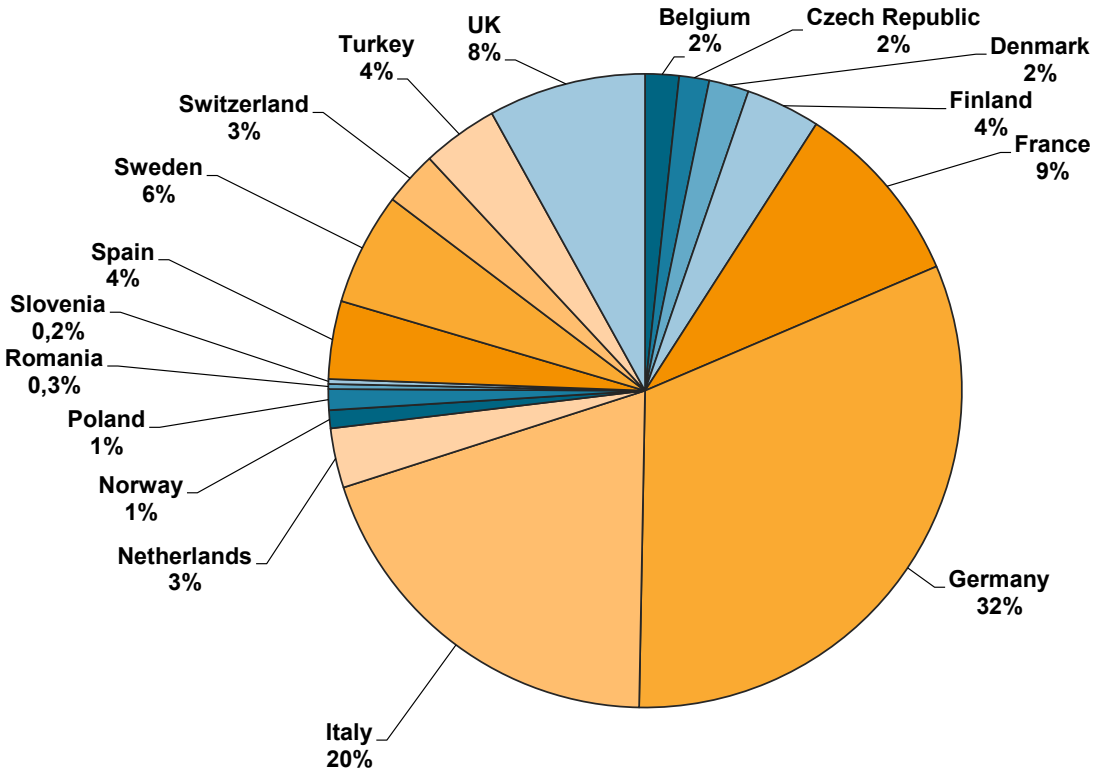
ISC Statistics: National Home Sales - global

Fluid Power 2021 (estimated): 47.1 Billion Euro - preliminary



CETOP Statistics: National Home Sales - Europe

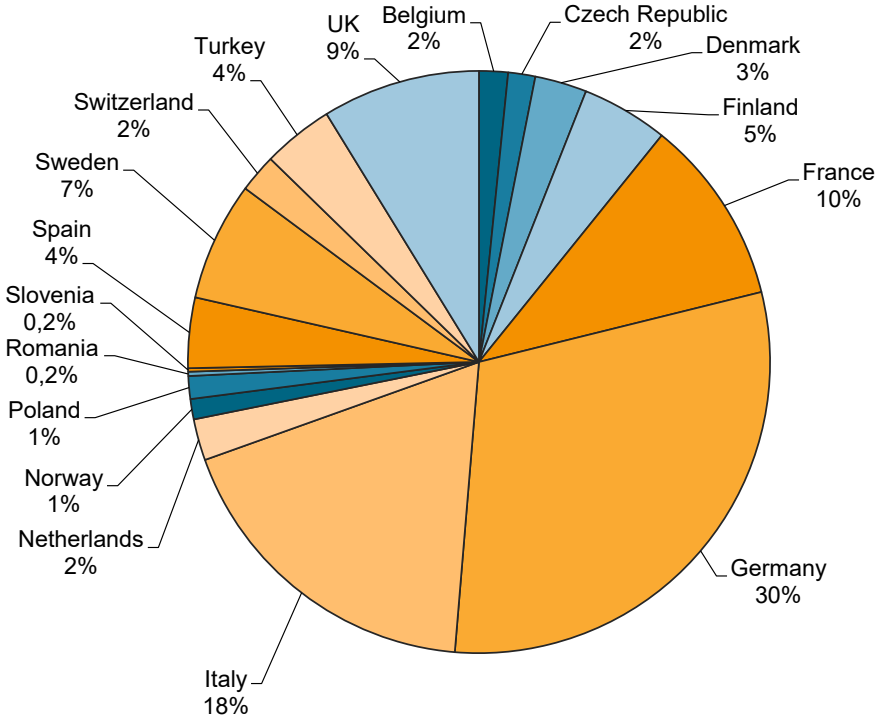
Fluid Power 2021 (estimated): 14.3 Billion Euro - preliminary



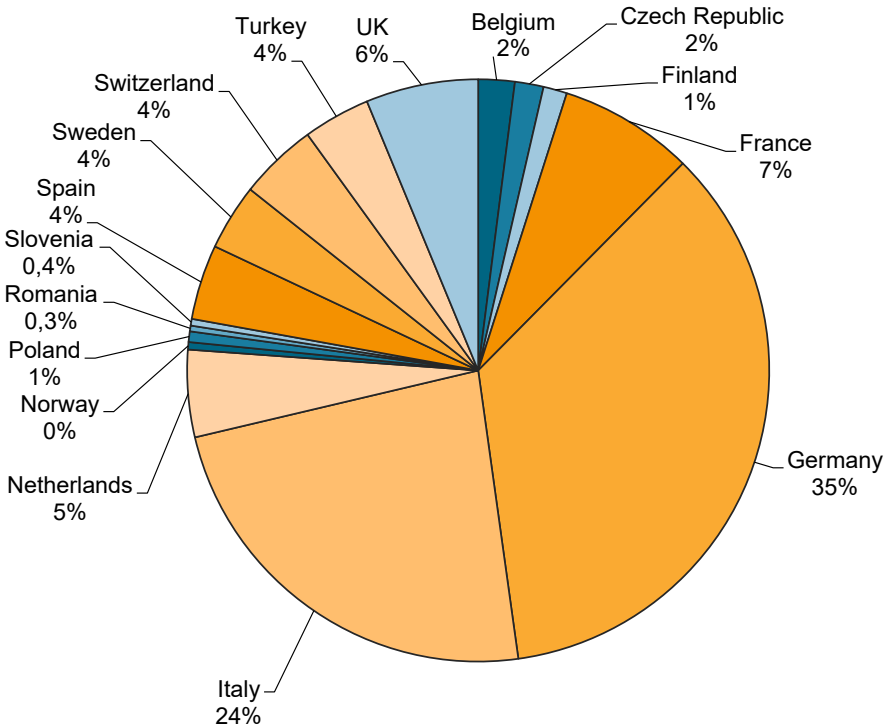
CETOP Statistics: National Home Sales - Europe

Hydraulics and Pneumatics by Countries 2021 (estimated) preliminary

Hydraulics (estimated): 10.1 Billion Euro



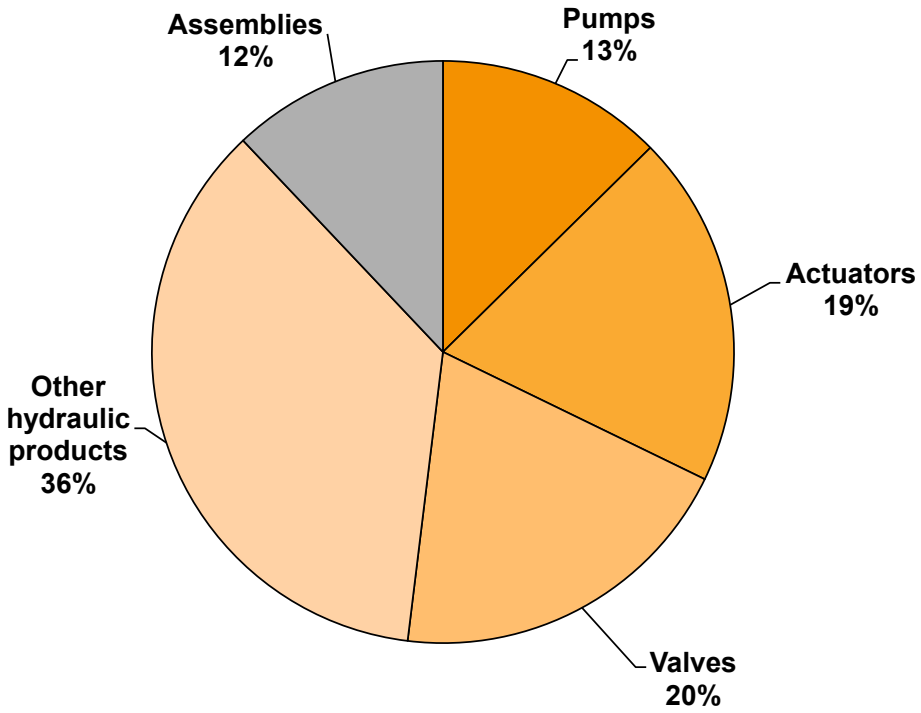
Pneumatics (estimated): 4.2 Billion Euro



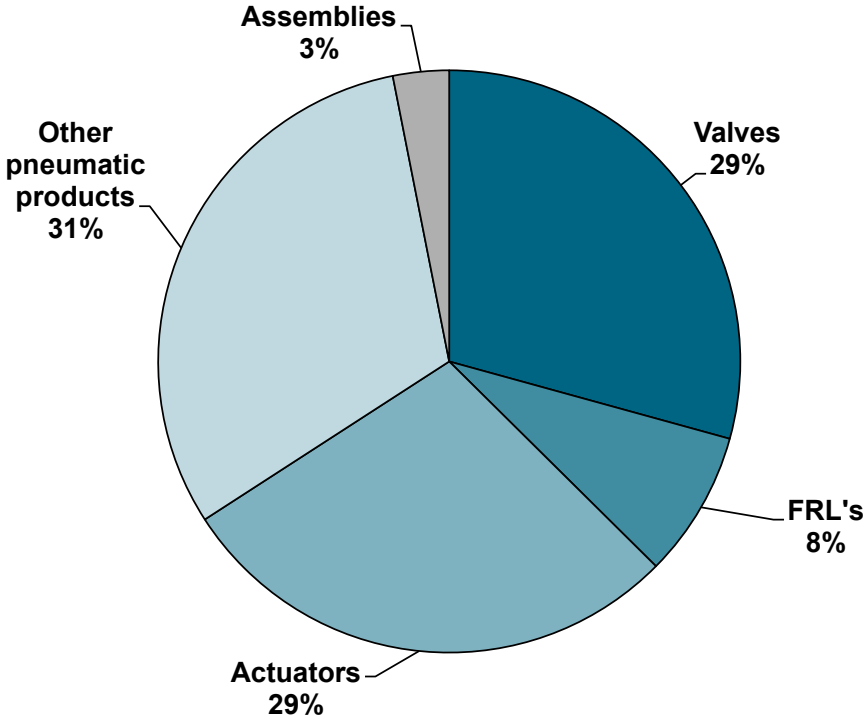
CETOP Statistics: National Home Sales - Europe

Hydraulics and Pneumatics by Products 2021 (estimated) preliminary

Hydraulics (estimated): 10.1 Billion Euro



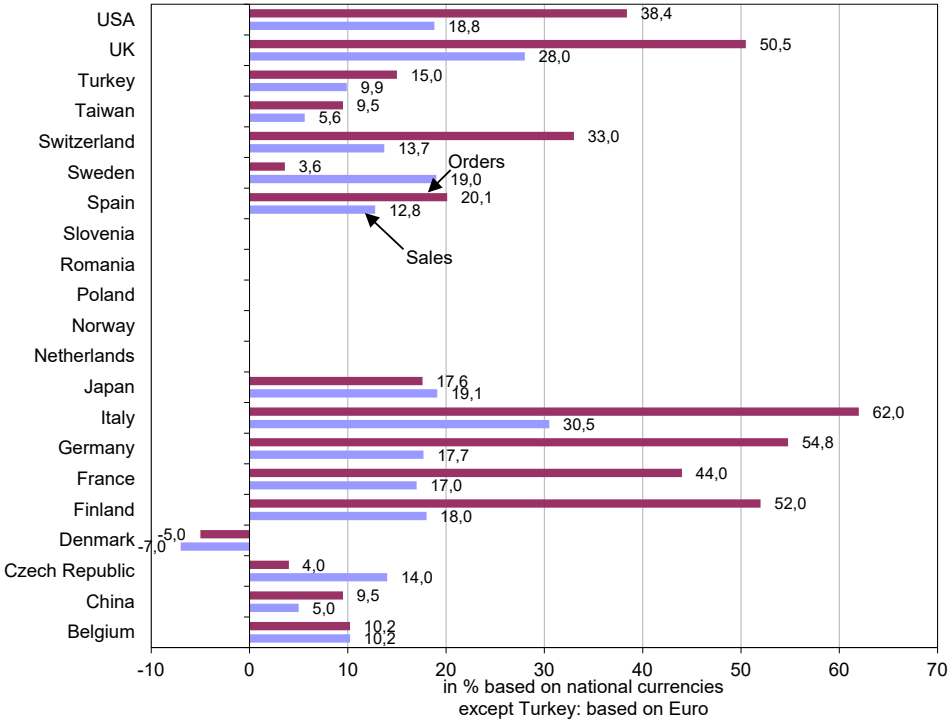
Pneumatics (estimated): 4.2 Billion Euro



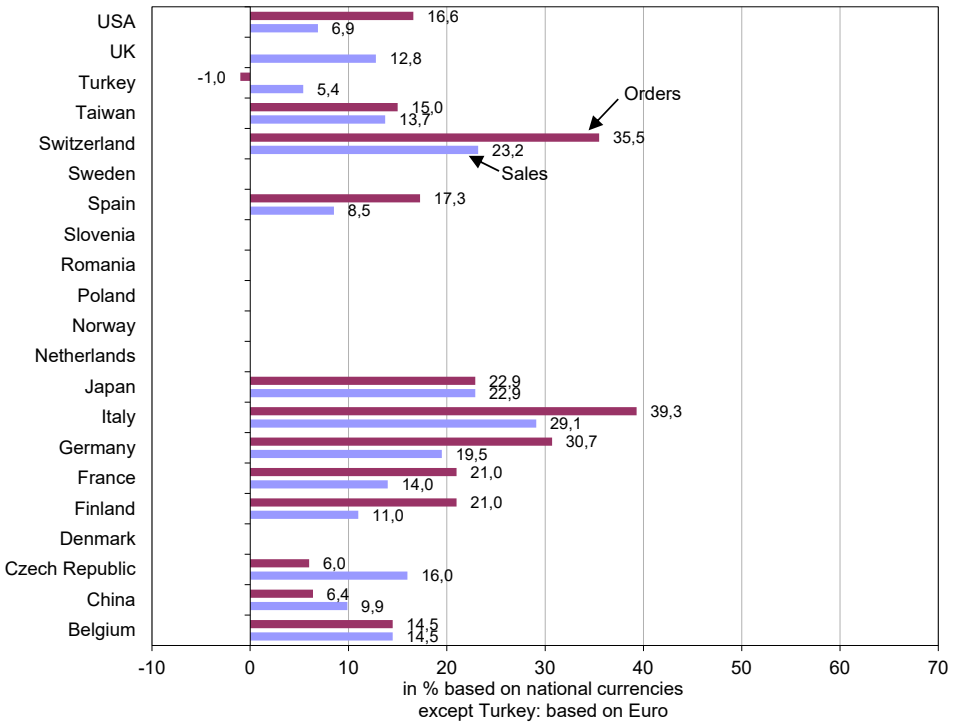
Orders and Sales 2021 vs 2020

Hydraulics and Pneumatics

Hydraulics Orders and Sales Changes Jan-Dec 2021/Jan-Dec 2020
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2021



Pneumatics Orders and Sales Changes Jan-Dec 2021/Jan-Dec 2020
CETOP/ISC Quarterly Trend Survey 1-4 Quarter 2021



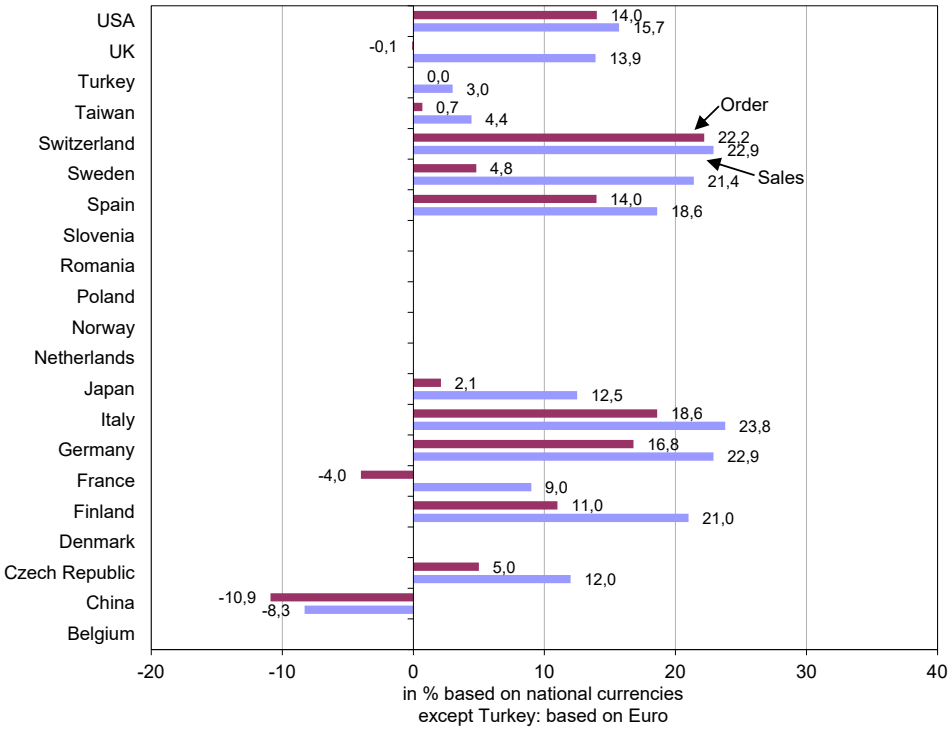
15 June 2022

Chart 6

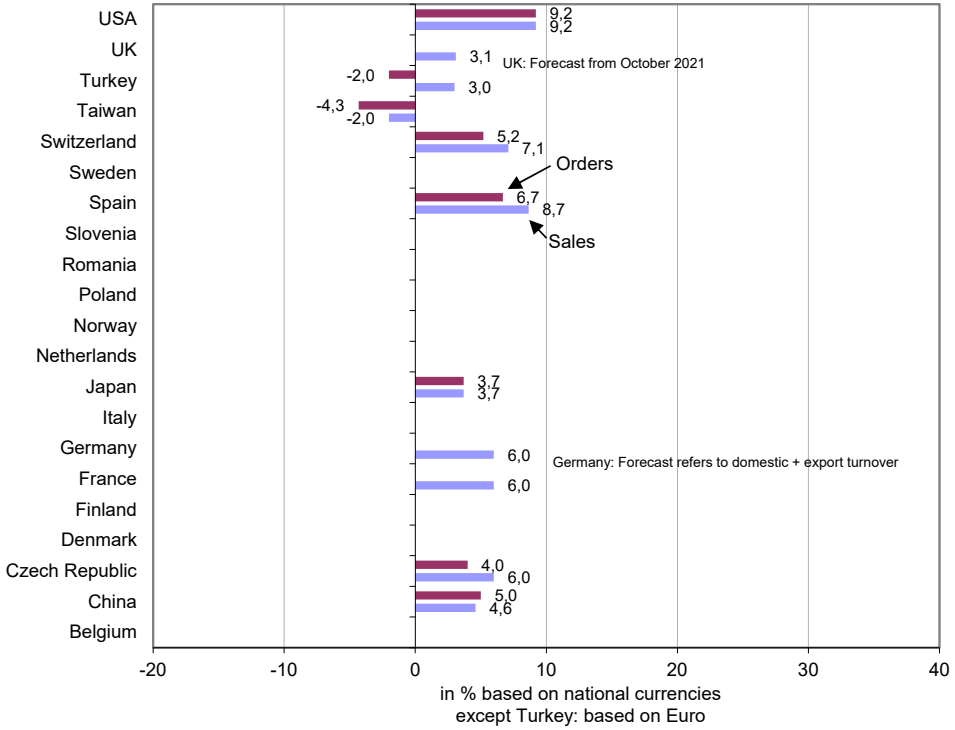
CETOP/ISC Statistics: Global Fluid Power Industry

Hydraulics Development and Forecast 2022 by the national associations

Hydraulics Orders and Sales Changes Jan-Mar 2022/Jan-Mar 2021
CETOP/ISC Quarterly Trend Survey 1 Quarter 2022



Hydraulics Orders and Sales Forecast 2022/2021
CETOP/ISC Quarterly Trend Survey 1 Quarter 2022



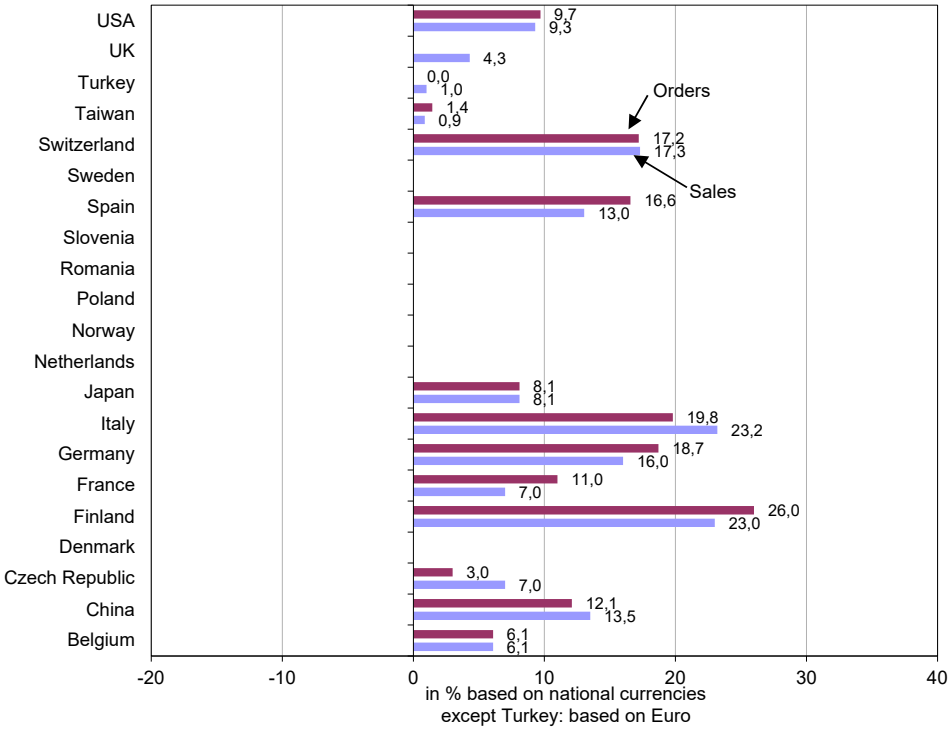
15 June 2022

Chart 7

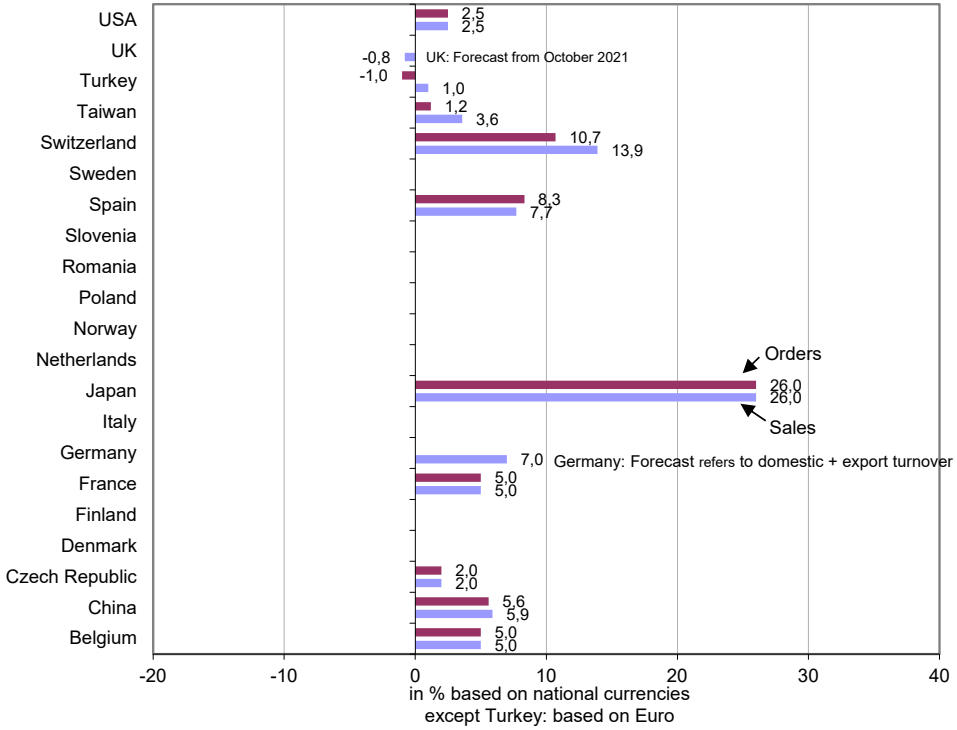
CETOP/ISC Statistics: Global Fluid Power Industry

Pneumatics Development and Forecast 2022 by the national associations

Pneumatics Orders and Sales Changes Jan-Mar 2022/Jan-Mar 2021
CETOP/ISC Quarterly Trend Survey 1 Quarter 2022



Pneumatics Orders and Sales Forecast 2022/2021
CETOP/ISC Quarterly Trend Survey 1 Quarter 2022



15 June 2022

Chart 8

CETOP / ISC leading indicators

Fluid Power April 2022

Excerpt from CETOP/ISC Monthly exchange on tendencies, April 2022

3. New orders (compared to previous month)

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

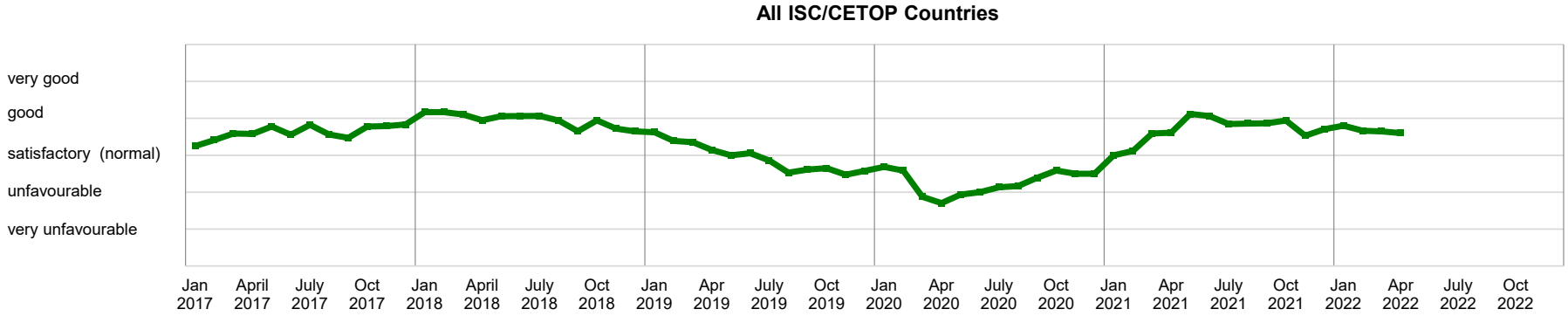
5. Expected business situation (in the next 3 months)

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

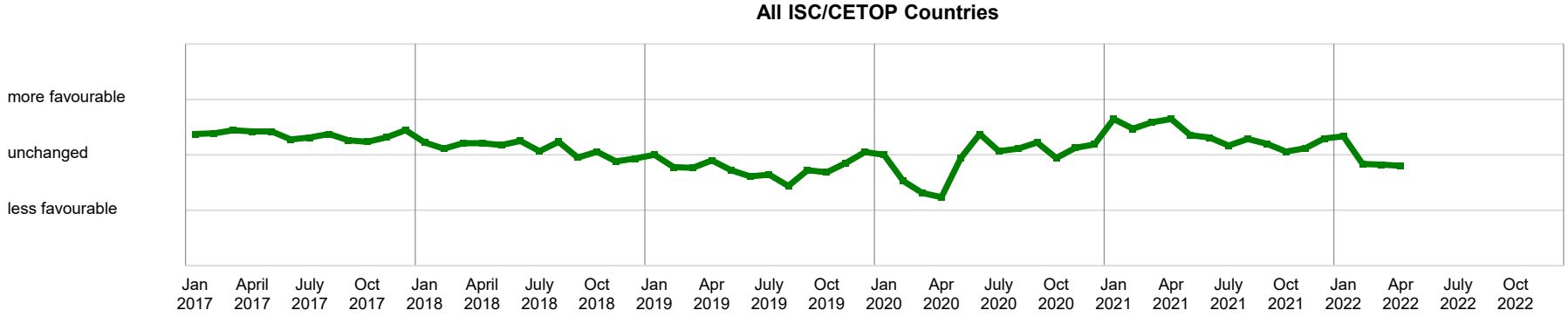
CETOP / ISC leading indicators

Fluid Power - Development January 2017 - April 2022

Business climate



Expected business situation in the next three months



Economic Commission Activities

Market Outlook Web Conferences

- October 2021
- March 2022

Regular collection of CETOP and ISC Statistics, following a strict schedule

CETOP Economic Commission online activities :

- online collection using web portal
- results tables available in the member section of the CETOP website
- market outlook presentations available in the member section

cetop
The Voice of the European Fluid Power Industry

Survey Calendar 2023

	Questionnaire	Return	Published
Monthly Exchange on Tendencies	**First working day of month**	End of 1° week	End of 2° Week

Quarterly Trend Survey			
Quarter 1	**31/03/2023**	1 month later	1 month later
Quarter 1 to 2	**31/05/2023**		
Quarter 1 to 3	**29/09/2023**		
Quarter 1 to 4	**08/01/2024**		

Annual Product Statistics	**31/03/2023**	1 month later	1 month later

6.2 CETOP Education matters

1) New CETOP Vice President Education, election at the General Assembly.

2) The work of reviewing the CETOP Education Recommendations is still ongoing.
   Actual:

   Done:
   - Recommendation Fluid Power Electronics 1, has been merged into the Level 2 and 3 Hydraulic
   - Approved Centre Guidelines, new digital forms: centre application and approval, verifier reports, work experience, examination entry, etc. is now on the CETOP homepage, they are possible for download.

   Coming reviews:
   - Pneumatic Recommendations
   - Recommendations Booklet, (complete book)

6.3 CETOP Marketing and Communication matters

- CETOP website
- CETOP 60 Years Jubilee
- CETOP Directory
- New CETOP Vice President Marketing & Communication, election at the General Assembly

6.3 CETOP Marketing and Communication matters

CETOP Directory - Questions:

- Update 2023, April 2023?

- Online edition?
  - database with search for companies and products?
  - Flipbook, interactive?
  - PDF version, high resolution and low resolution, for download?
- Printed version?

- Companies' advertisements, logo entries etc: to be paid?

- Alternative: Smaller format and reduced content?

6.4 CETOP Technical matters

CETOP Technical commission activities

European directive survey

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

REACH COMPLIANCE

Position papers

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

Technical trends

✓ **Electrification : Survey and CETIM intervention in 2021**

1. What do you consider to be the primary reason for an OEM to develop or adopt an electric machine? (Please select only one priority per category.)

Other reasons:

Green Image; Marketing, Political image
Trend in reducing Co2;
Green energy,
Financial aspects, cost reduction
Demands of the market,
Modification of faster and more precise machines,
Science based targets + Customers want to be sustainable
Noise, congested area of operation, improved operator experience and control.
Not wanting to use oil anymore because of environment or food regulations.
Exploring before others (early adopters)

CETOP Technical commission news

Pressure Directive:

suppression of note 1 of guideline C-13

Guideline C-13

Pressure Equipment Directive PED 2014/68/EU
Commission's Working Group "Pressure"

Guideline related to: Article 2(6), Article 4 paragraph 2(b), Article 14 paragraph 6

Question	When several items of pressure equipment are assembled by a manufacturer to constitute a functional whole, and when one or several of those items are excluded from the PED, is the resulting whole considered as an assembly covered by the PED ?
Answer	The definition of assemblies in Article 2(6) does not prohibit non PED pressure equipment (pressurised equipment excluded by Article 1 paragraph 2 to be included in an assembly covered by the PED. In the case of a PED assembly, the global conformity assessment required by Article 14 paragraph 6 does not include the assessment of non-PED items of pressure equipment. The assessment of - the integration of the assembly - the protection of the assembly against exceeding the permissible operating limits shall be conducted in the light by the highest category of PED items of pressure equipment included, but it shall also take account of the characteristics of the non-PED equipment. See also PED guideline C-12.
Reason	
Note 1	A hydraulic system of an item of machinery can meet the definition of Article 2(6), but as it is not intended to be put into service as such, it is not covered by Article 4 paragraph 2(b) (see PED Guideline C-10). On the other hand, a refrigeration system is considered to be a PED assembly even if some of the pieces under pressure are excluded from PED.

Machine Directive

-Revision in process

Subjects of interest for Fluid power : Quasi machine

✓ Definition
✓ Applicable requirements

Next Step: Examination of the text by the COREPER: June 22, 2022
with a view to presenting the text to the European Council before the end of June

Green Deal

✓ **Objectif : to make Europe climate neutral by 2050**

➢ **Sustainable Products Initiative**

- Digital passport
- revision of the ecodesign directive
- …

➢ **Fit for 55**

- vehicle CO^2 emissions
- carbon market (ETS)
- carbone border adjustment mechanism(CBAM)
- …