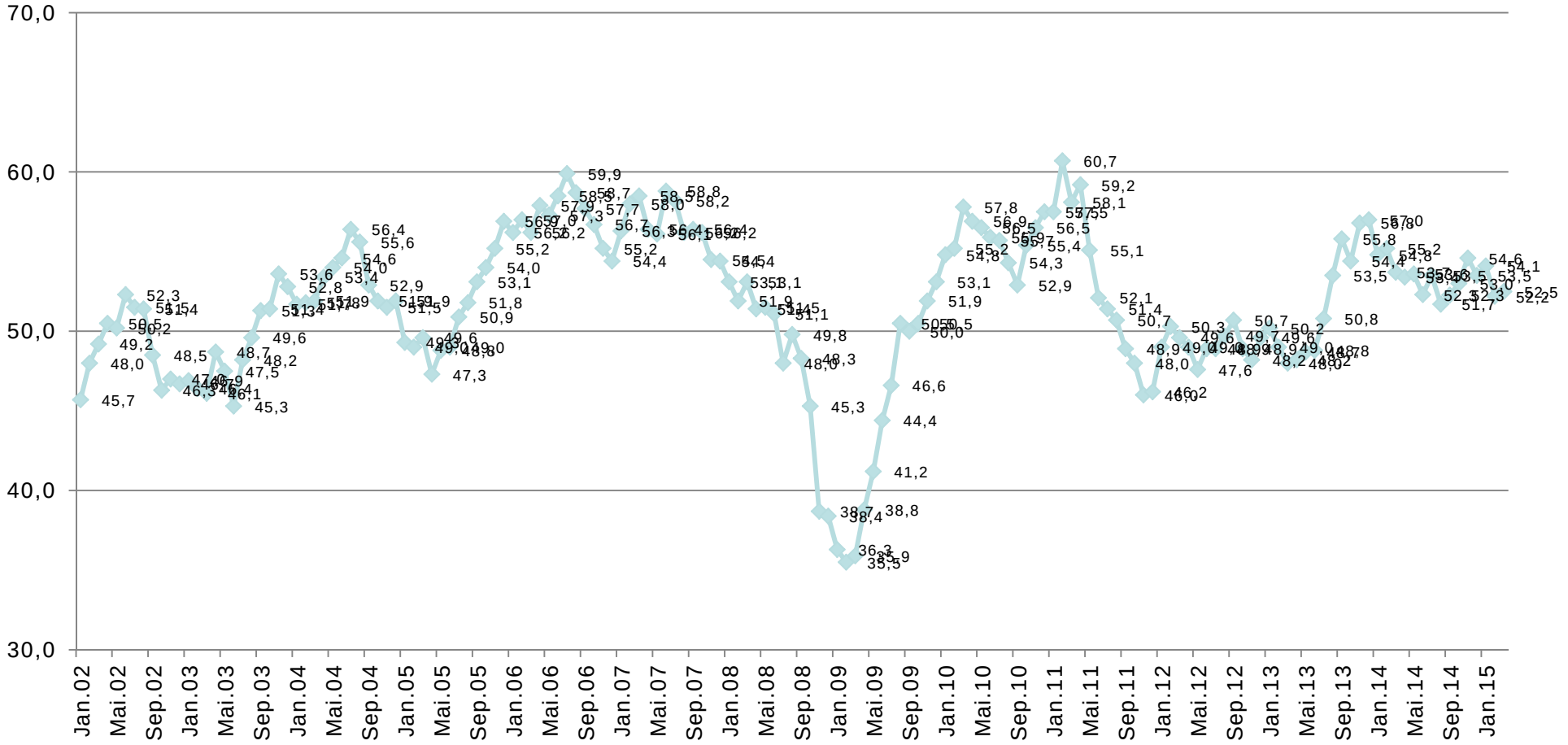
Fluid Power market
The Netherlands

Arjan Coppens
Committee member
FEDA

Aangesloten bij FME POWERED BY DUTCH TECHNOLOGY

Looking at the Nevi Index:



Source: Nevi Purchase Index. (>50 positive, <50 negative development)

Aangesloten bij FME POWERED BY DUTCH TECHNOLOGY

Looking at the Nevi Index:

NEVI Index

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Januari		45,7	46,9	51,7	49,3	56,2	46,3	53,1	36,3	54,8	57,5	49	50,2	54,8	54,1
Februari		48	46,4	51,8	49	57	58	51,9	35,5	55,2	60,7	50,3	49	55,2	52,2
Maart		49,2	46,1	51,9	49,6	56,2	58,5	53,1	35,9	57,8	58,1	49,6	48	53,7	52,5
April		50,5	48,7	53,4	47,3	57,9	56,4	51,4	38,8	56,9	59,2	49	48,2	53,4	
Mei	46	50,2	47,5	54	48,8	57,3	56,1	51,5	41,2	56,5	55,1	47,6	48,7	53,6	
Juni	46,4	52,3	45,3	54,6	49	58,5	58,8	51,1	44,4	55,9	52,1	48,9	48,8	52,3	
Juli	47,8	51,5	48,2	56,4	50,9	59,9	58,2	48,8	46,6	55,7	51,4	48,9	50,8	53,5	
Augustus	47,8	51,4	49,6	55,6	51,8	58,7	56,2	49,8	50,5	54,3	50,7	49,7	53,5	51,7	
September	46,1	48,5	51,3	52,9	53,1	57,7	56,4	48,3	50	52,9	48,9	50,7	55,8	52,2	
Oktober	42,7	46,3	51,4	51,9	54	56,7	56,2	45,3	50,5	55,4	48	48,9	54,4	53	
November	42,5	47	53,6	51,5	55,2	55,2	54,5	38,7	51,9	56,5	46	48,2	56,8	54,6	
December	43,8	46,7	52,8	51,9	56,9	54,4	54,4	38,4	53,1	57,5	46,2	49,6	57	53,5	
Average	45,39	48,94	48,98	53,13	51,24	57,14	55,83	48,45	44,56	55,78	52,83	49,20	51,77	53,46	52,93

Source: Nevi Purchase Index. (>50 positive, <50 negative development)

Looking at CBS:

- CBS is reporting only quarterly since 2014
- Q1/2015 not available yet
- FEDA/FME is working on statistics CBS mixed with FEDA



Source: Centraal Bureau Statistiek

Industry Hydraulics:

Market development, outlook 2015, major NL related topics

1. More difficult to maintain customer intimacy due to dual sourcing strategy customers. Open market.
2. Lack of investments : difficult to gain project business. (e.g. Offshore market->Oil price, Steel industry)
3. Smart industry (Industry 4.0) spurring initiatives for new collaboration. Positive for machine builders.
4. Company's differentiate from competition by using high end products and systems.
5. Very strong and aggressive competition in system business.
6. Service Business under pressure, strong competition of small and one person service companies.

Industry Pneumatics:

Market development, outlook 2015, major NL related topics

1. More difficult to maintain customer intimacy due to dual sourcing strategy customers. Open market
2. Lack of investments : difficult to gain project business
3. Smart industry (Industry 4.0) spurring initiatives for new collaboration. Positive for machine builders.
4. Company's differentiate from competition by using high end product s and systems.

Source: FEDA Members

Mobile Hydraulics:

Market developments, outlook 2015, major NL related topics

1. Electrification (applying electronics to control the equipment)
2. Logistic performance (application of rolling FC, shortening delivery times, subassembly)
3. Larger machines (in various markets the machines become bigger)
4. Essential knowledge (machine complexity increases, branch and product knowledge becomes more important))
5. Price sensitive (market price is still under pressure)

Mobile Pneumatics:

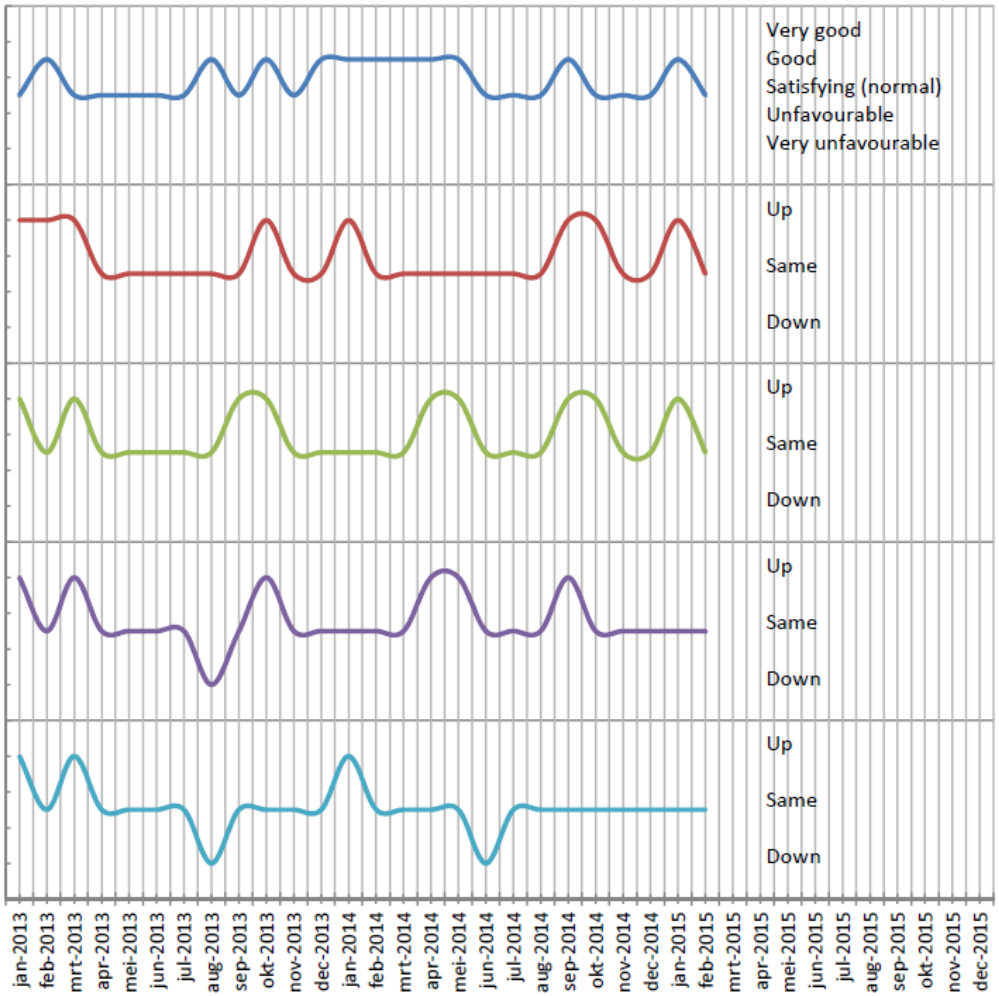
Market developments, outlook 2015, major NL related topics

1. Small market with some Truck related business and special vehicles Fire equipment , busses and container handling.
2. Market is developing slowly

Source: FEDA members

Pneumatics trend NL (proposal):

CETOP/ISC Monthly exchange on tendencies: February 2015 - Netherlands



1. Business climate (Current overall business situation)

2. National home sales (compared to previous month)

3. New orders (compared to previous month)

4. Order backlog (compared to previous month)

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

Aangesloten bij FME POWERED BY DUTCH TECHNOLOGY

General:

- Market develops well since (Q4/2014-)Q1/2015
- Reaction company's good feeling
- Waiting what oil price is going to do
- Also depending on markets around us in Europe

Thanks for your attention!