

# **WELCOME to the Fluid Power Economic Meeting 26 April 2017 in Hanover, Germany**

**Christian H. Kienzle**  
Chairman of the Board of the Fluid Power  
Association within VDMA  
CEO of ARGO-HYTOS GMBH, Kraichtal



# Welcome to the representatives of the worldwide Fluid Power Industry



**China**

**Czech Republic**

**Germany**

**Great Britain**

**India**

**Italy**

**Japan**

**Netherlands**

**Poland**

**Russia**

**Serbia**

**Taiwan**

**Turkey**

**United States**

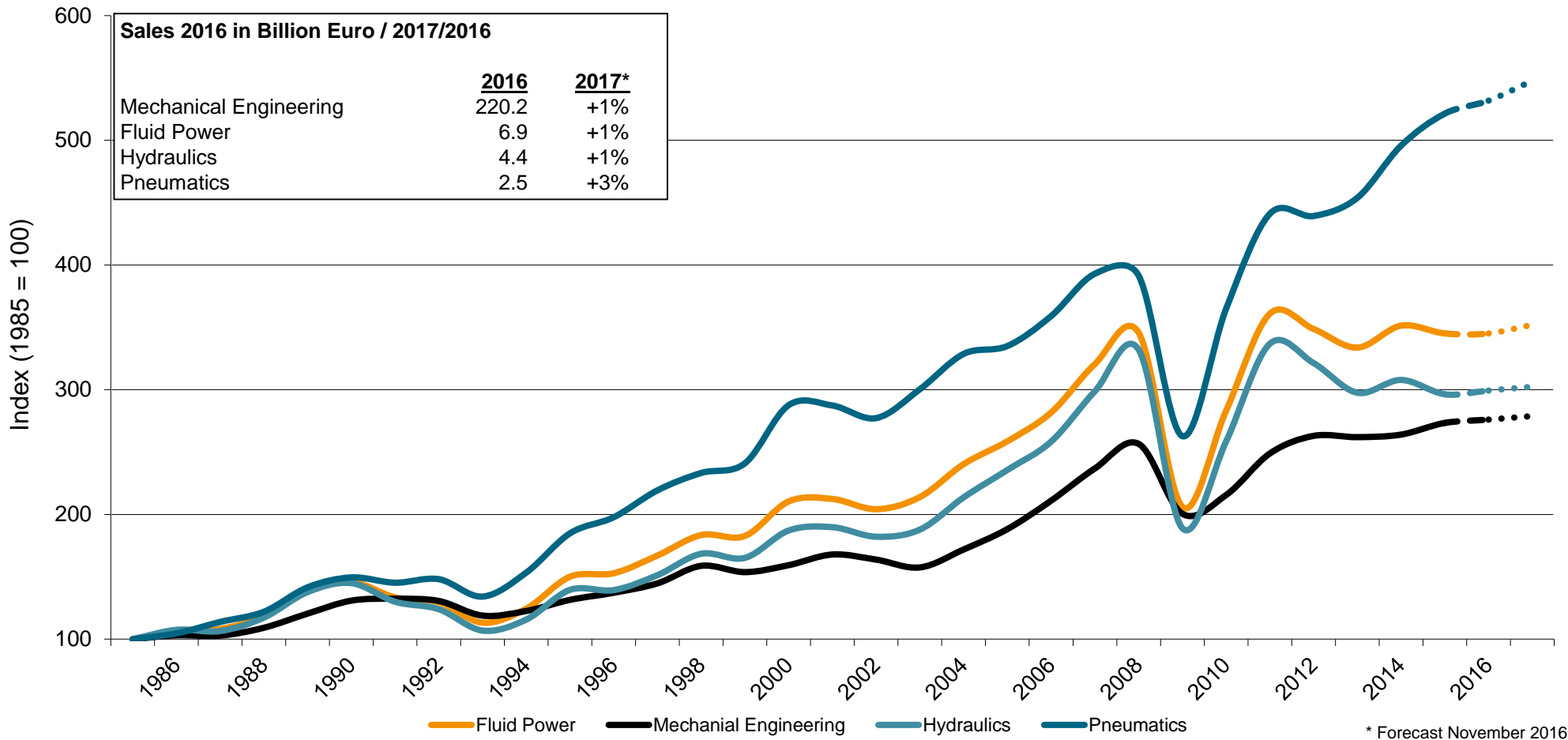
# Agenda



1. **Welcome** by Christian H. Kienzle, CEO of ARGO-HYTOS GmbH and Chairman of the Board of the VDMA Fluid Power Association
2. **Welcome** by the HANNOVER MESSE organizer  
Marc Siemering, Deutsche Messe AG
3. **Presentation on International exhibitions** of Deutsche Messe AG  
Marc Siemering, Deutsche Messe AG
4. **Presentation on the „Global Mechanical Engineering Industry: Modest Growth Amid Uncertainty”**  
Anke Uhlig, Economist of VDMA Economic and Statistic Affairs Department
5. **Presentation “International Fluid Power Statistics”**  
Dr. Amadio Bolzani, Chairman of the ISC – International Statistics Committee
6. **Open Q & A – Fluid Power market trends**
7. **Closing the meeting**
8. **Afterwards: Networking supper, VDMA booth party, Hall 19, booth A52 / C55**

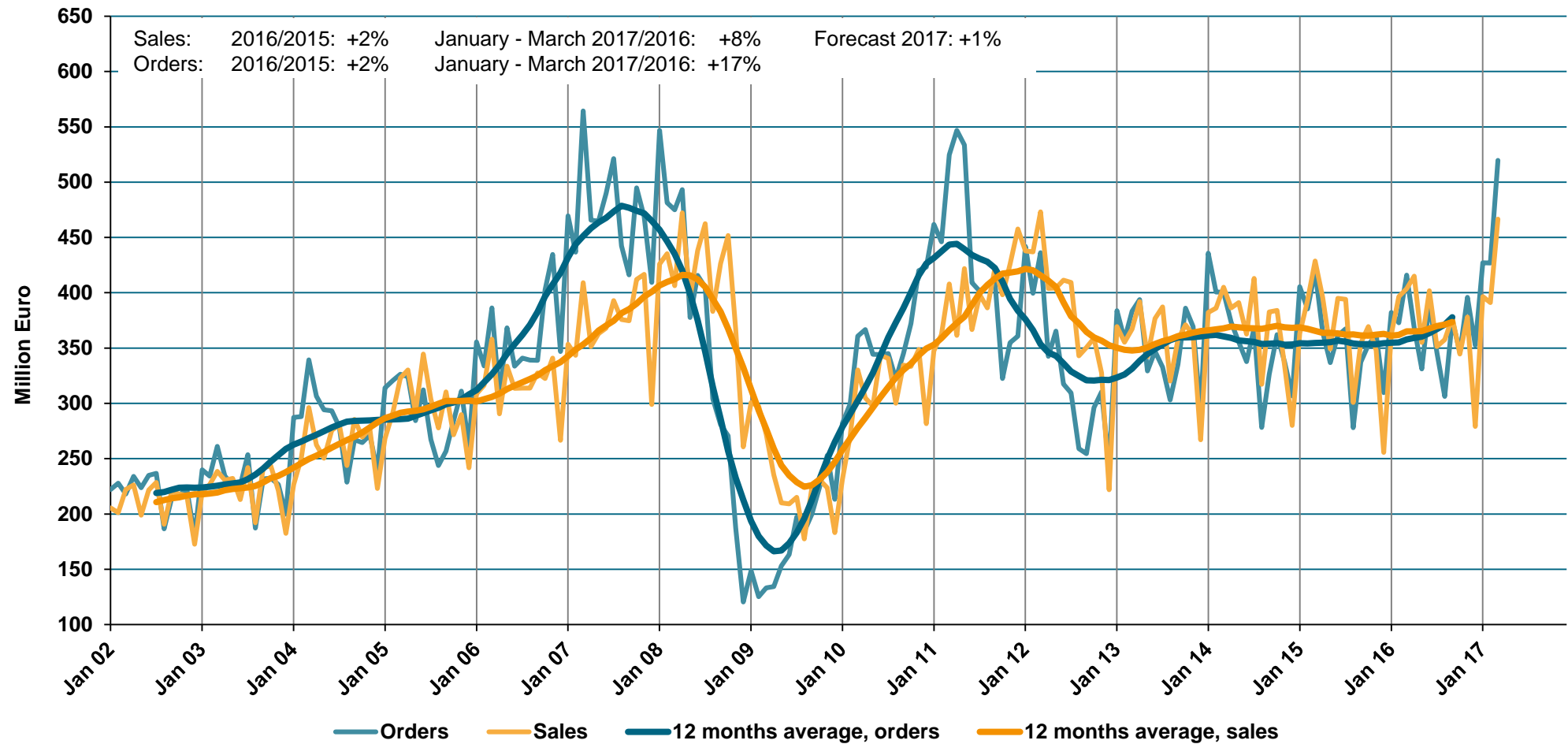
# Sales Development

## Mechanical Engineering / Fluid Power / Hydraulics / Pneumatics



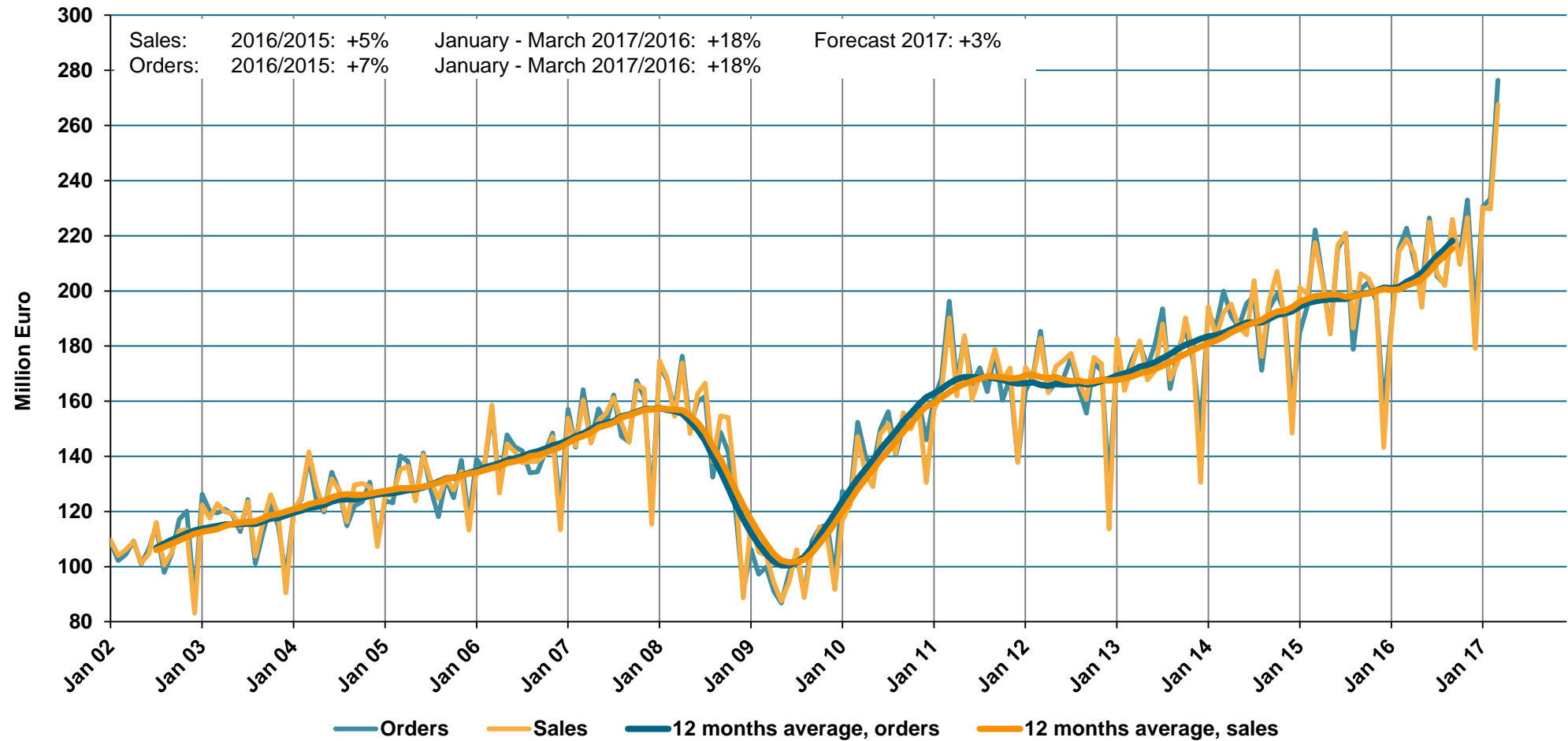
Source: VDMA

# Hydraulics Sales and Orders



Source: VDMA

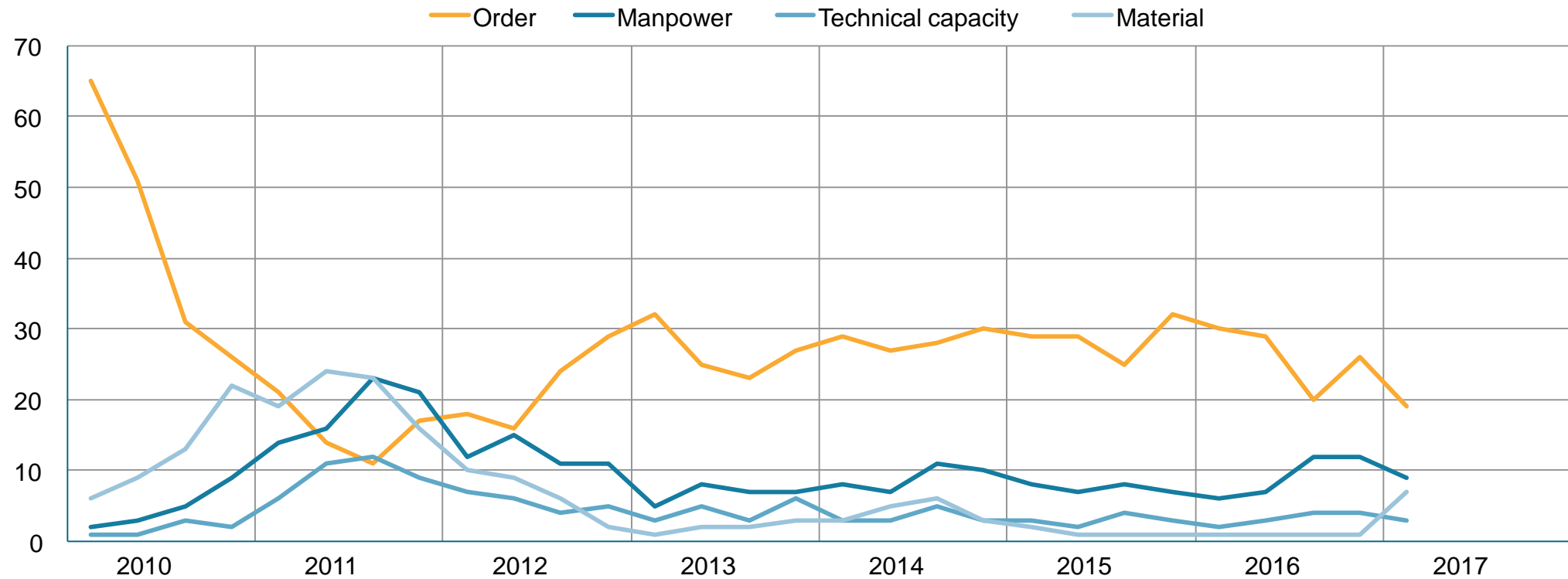
# Pneumatics Sales and Orders



Source: VDMA

# Limitation of production in German mechanical engineering due to a lack of ...

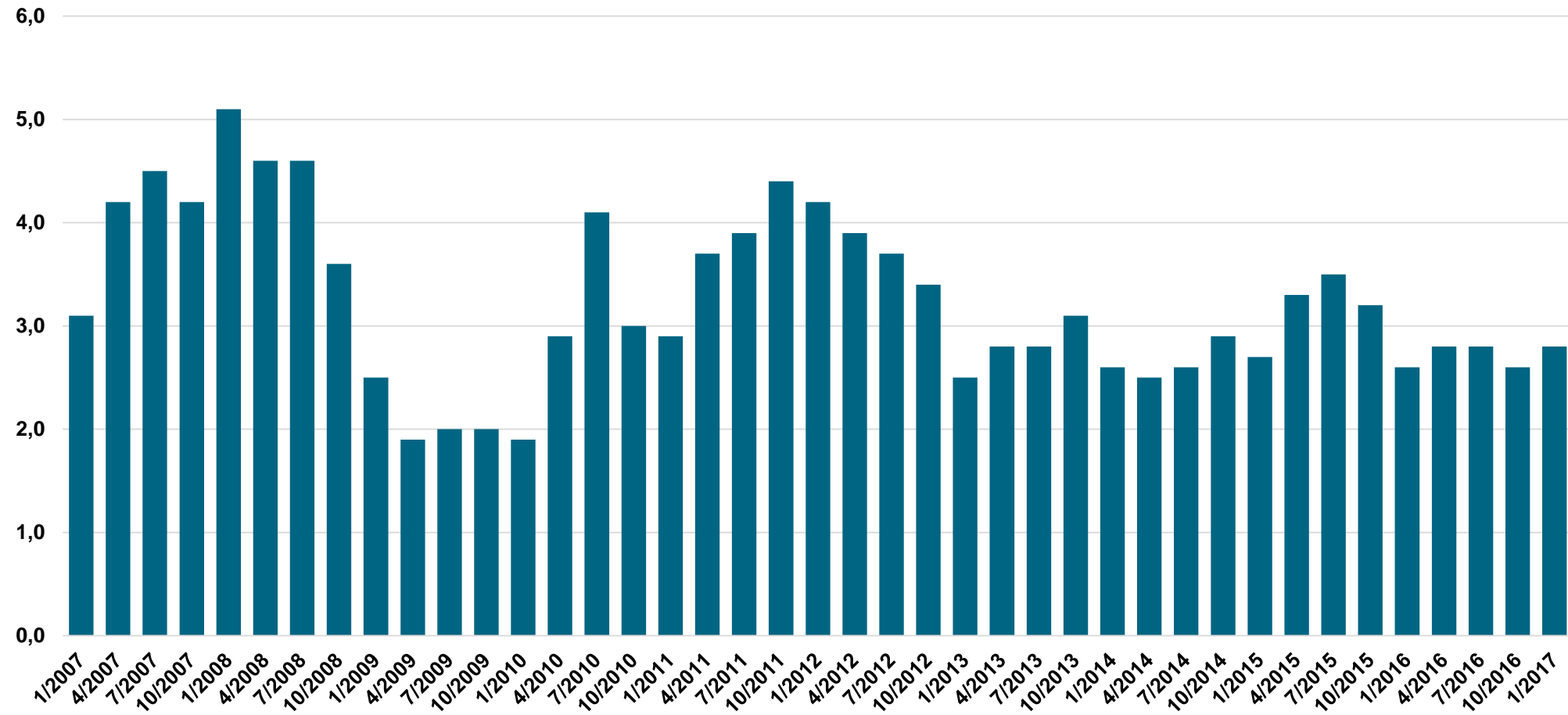
Share in percent



Source: ifo-Institut, VDMA

# Order backlog in months

## Hydraulics

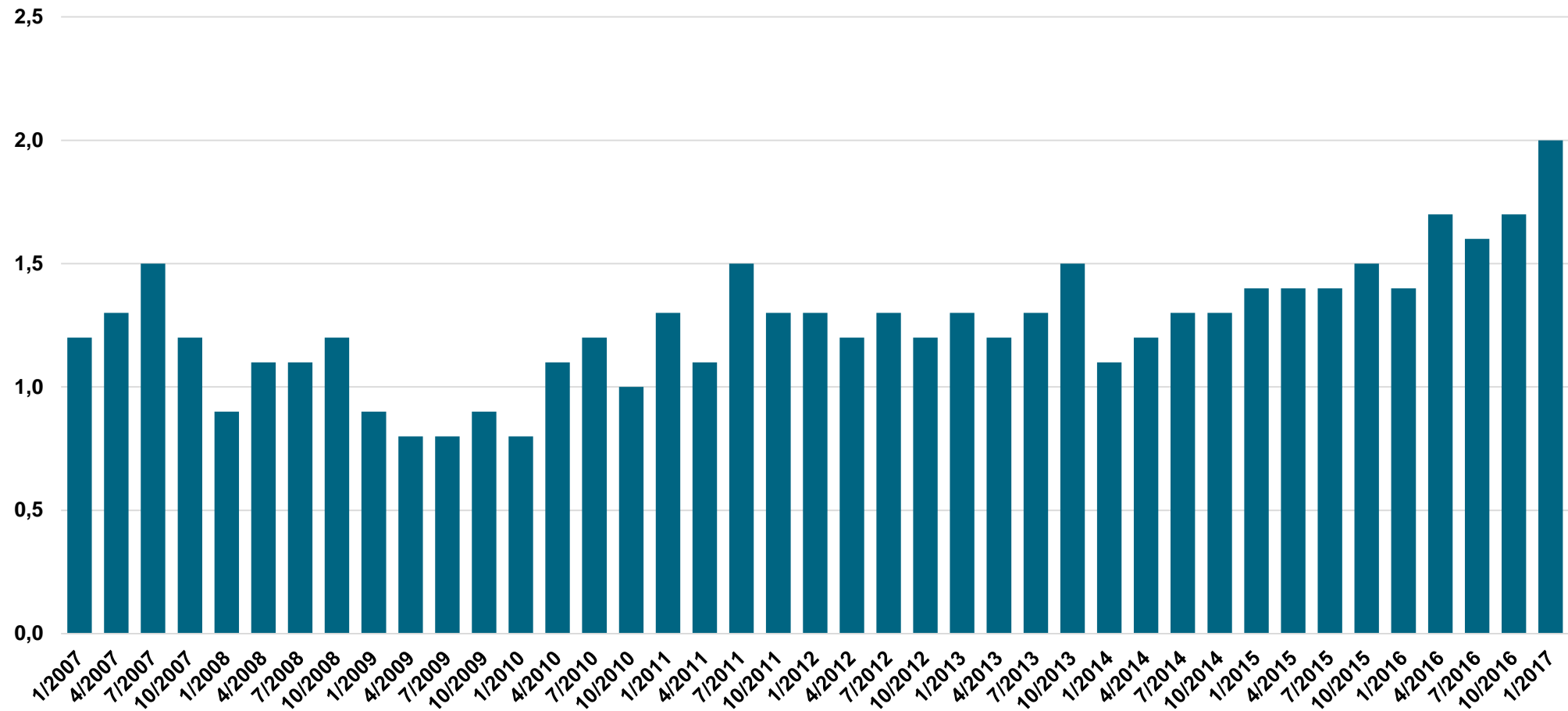


Source: ifo-Institut, VDMA



# Order backlog in months

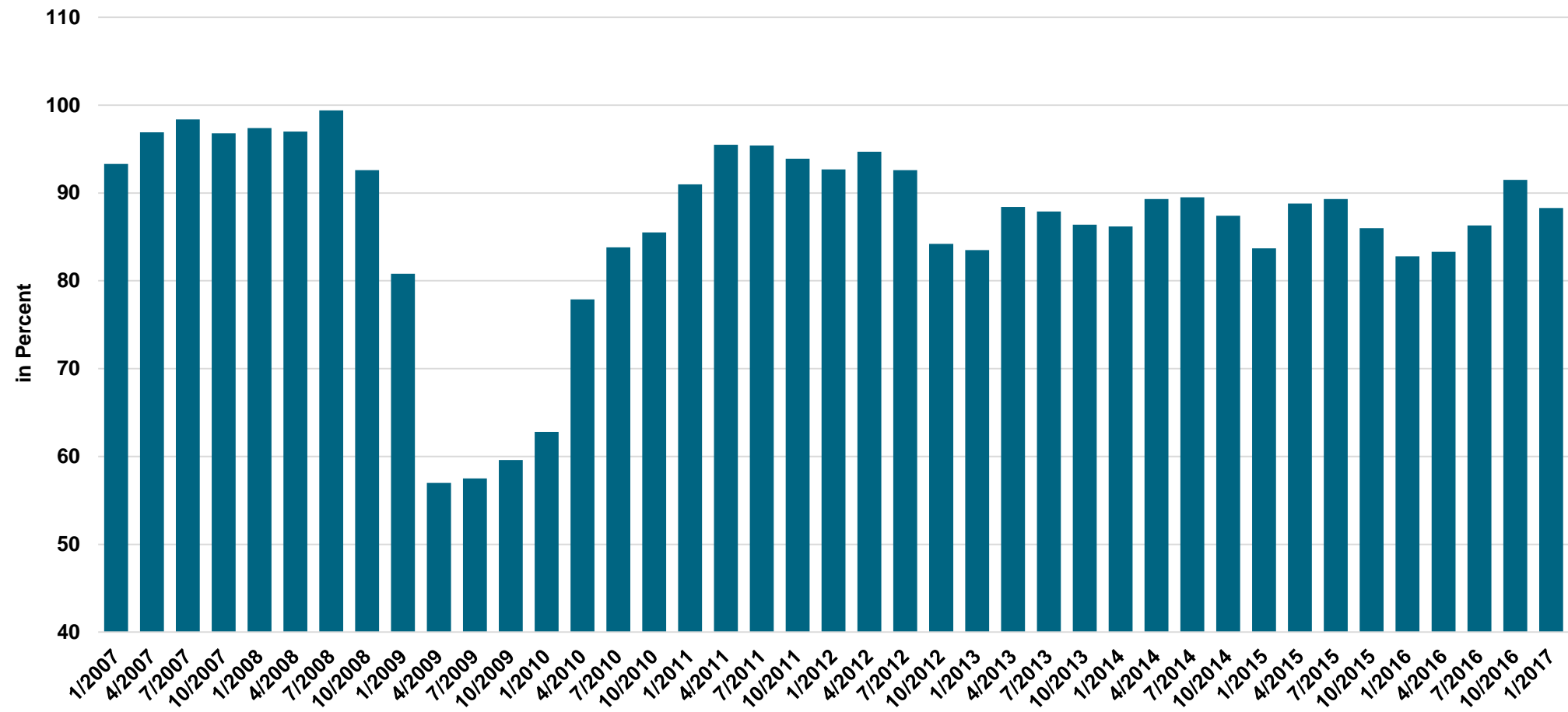
## Pneumatics



Source: ifo-Institut, VDMA

# Capacity utilization in percent

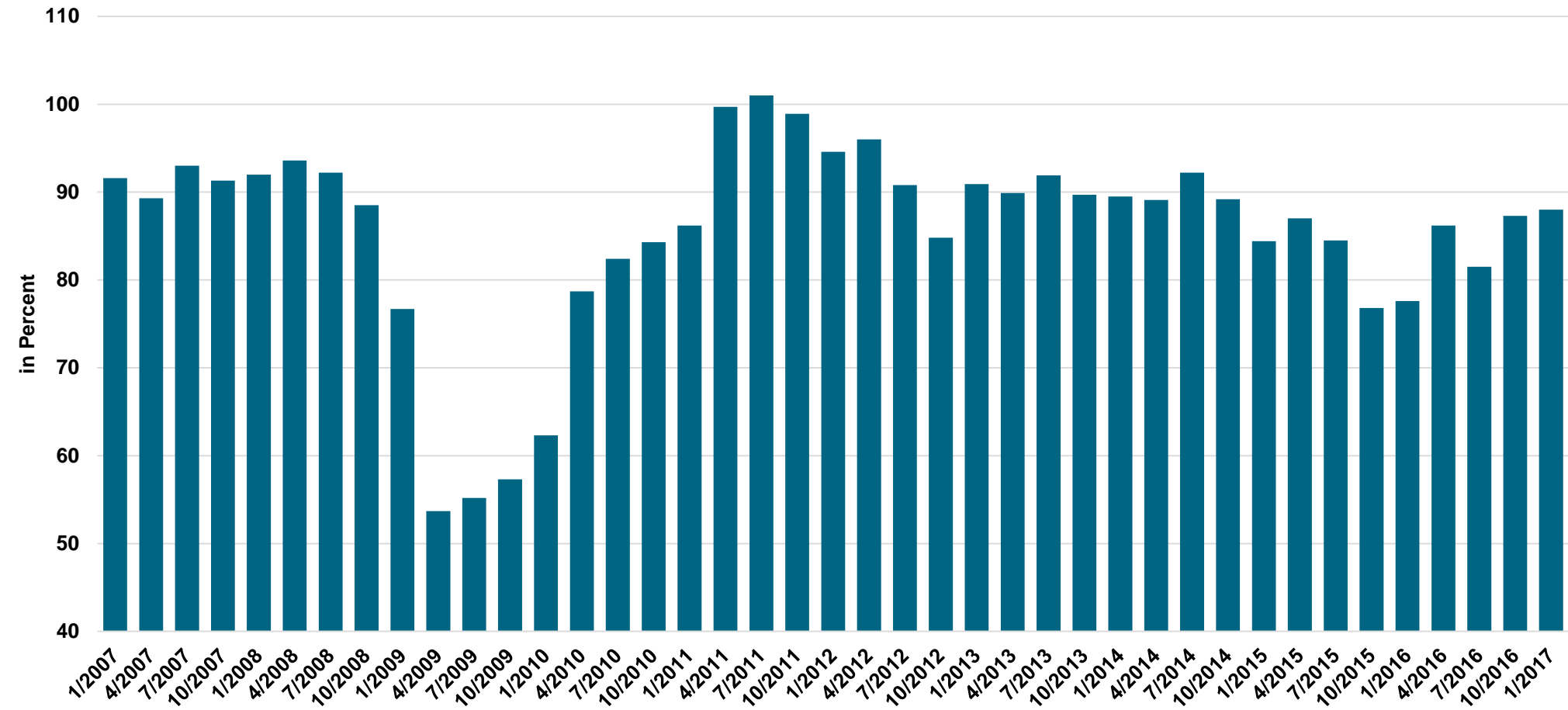
## Hydraulics



Source: ifo-Institut, VDMA

# Capacity utilization in percent

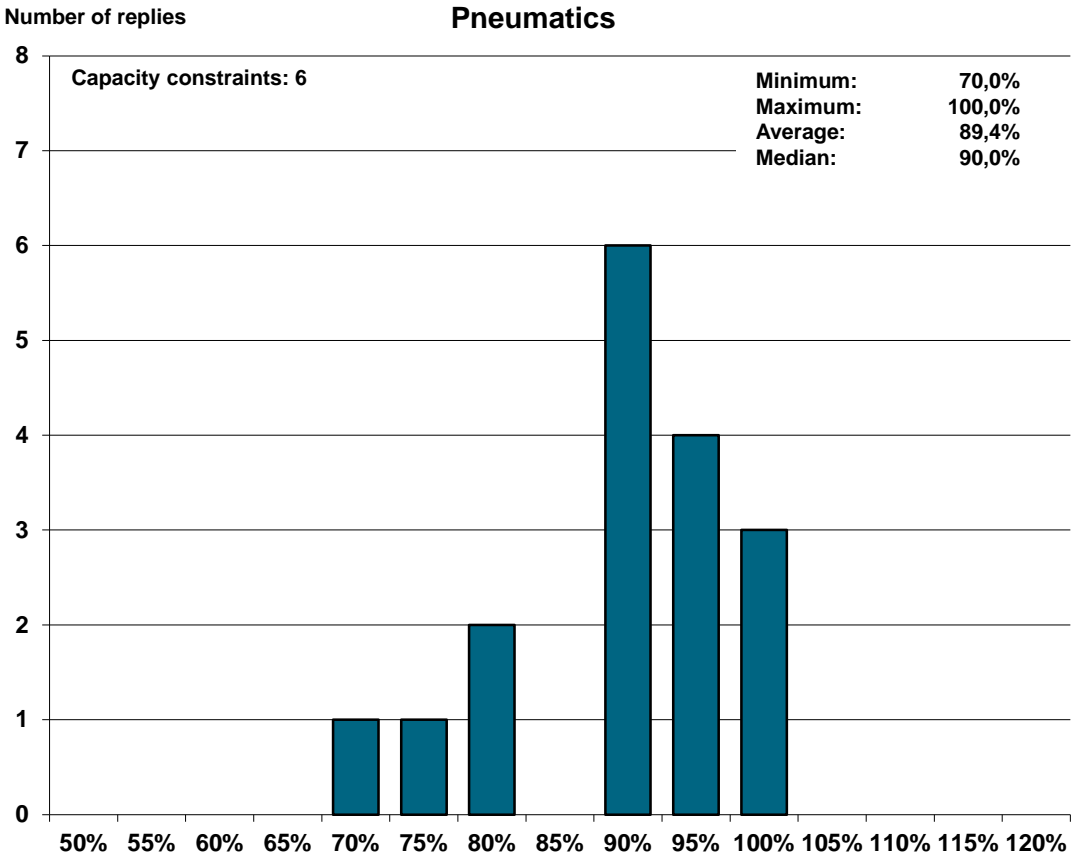
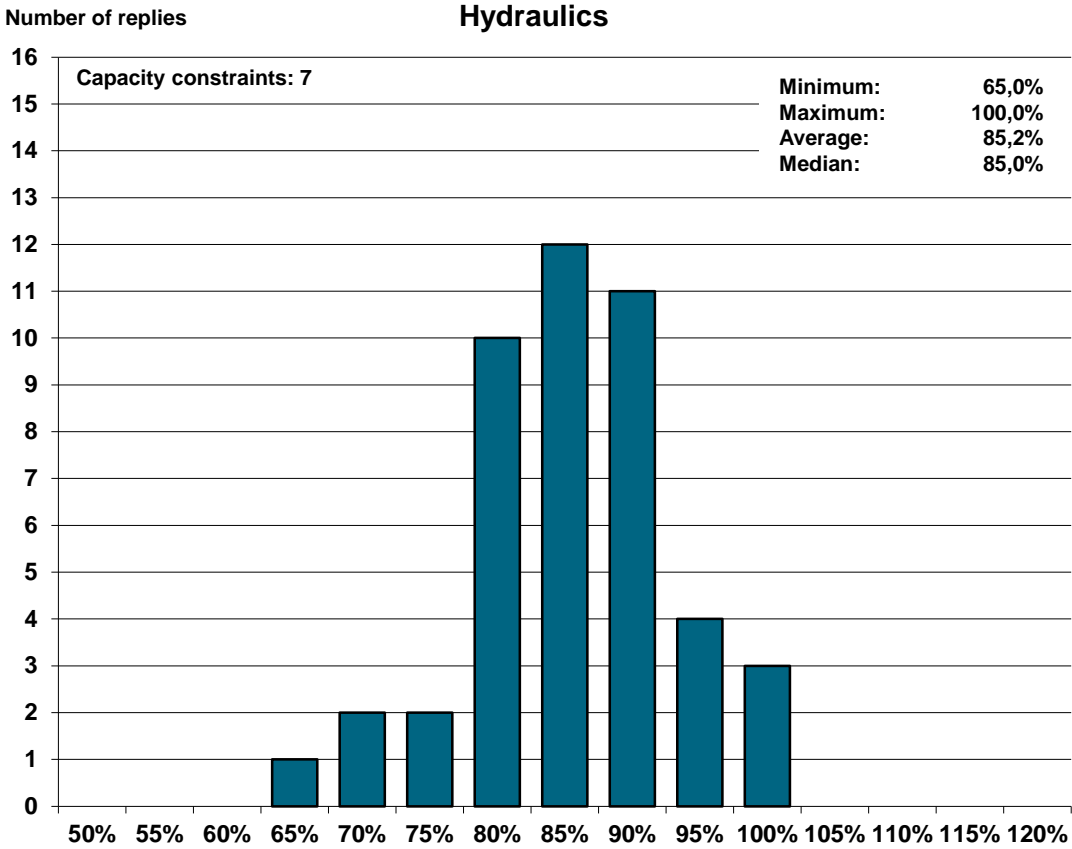
## Pneumatics



Source: ifo-Institut, VDMA

# German Fluid Power Industry

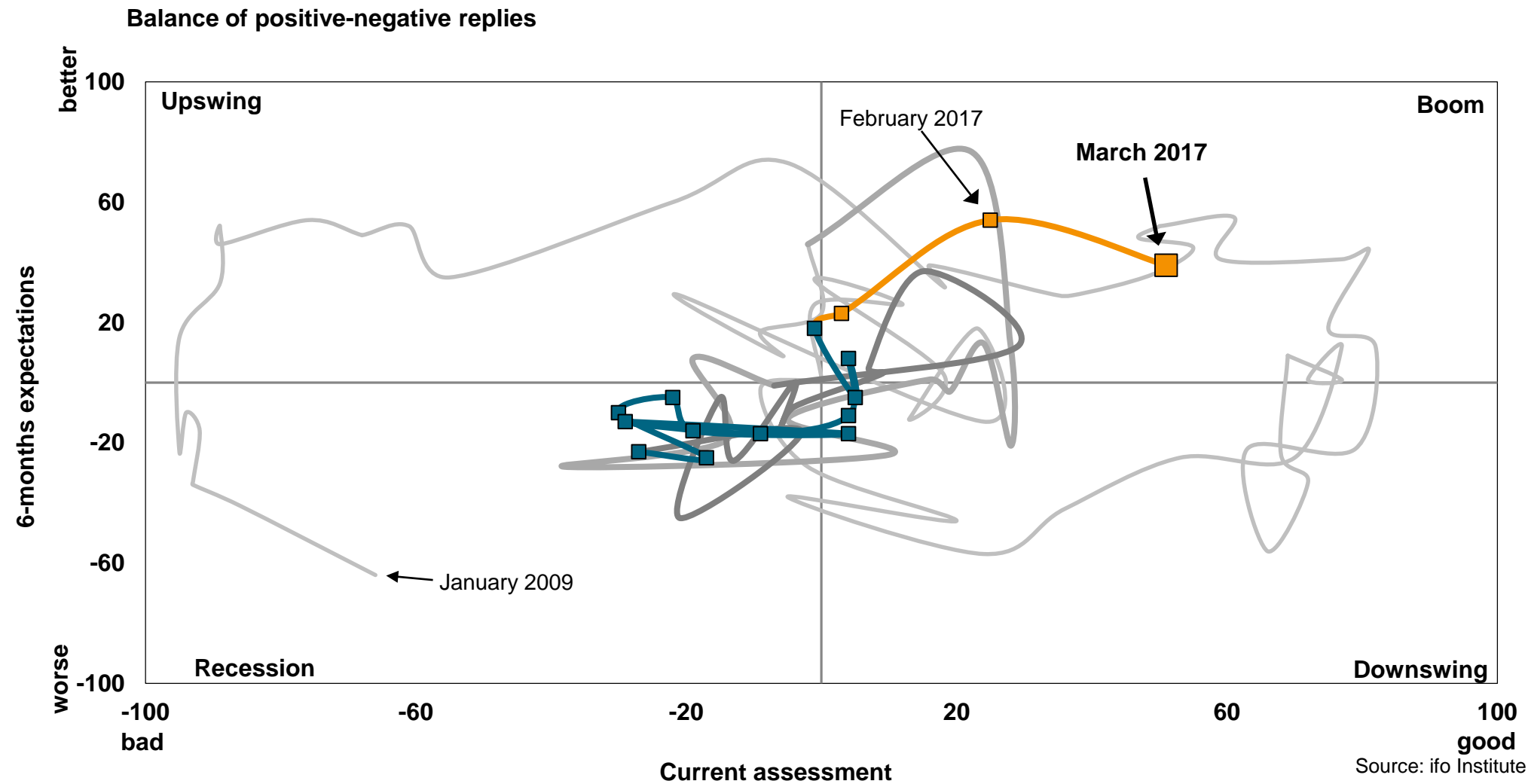
## Capacity Utilization March 2017



Source: VDMA

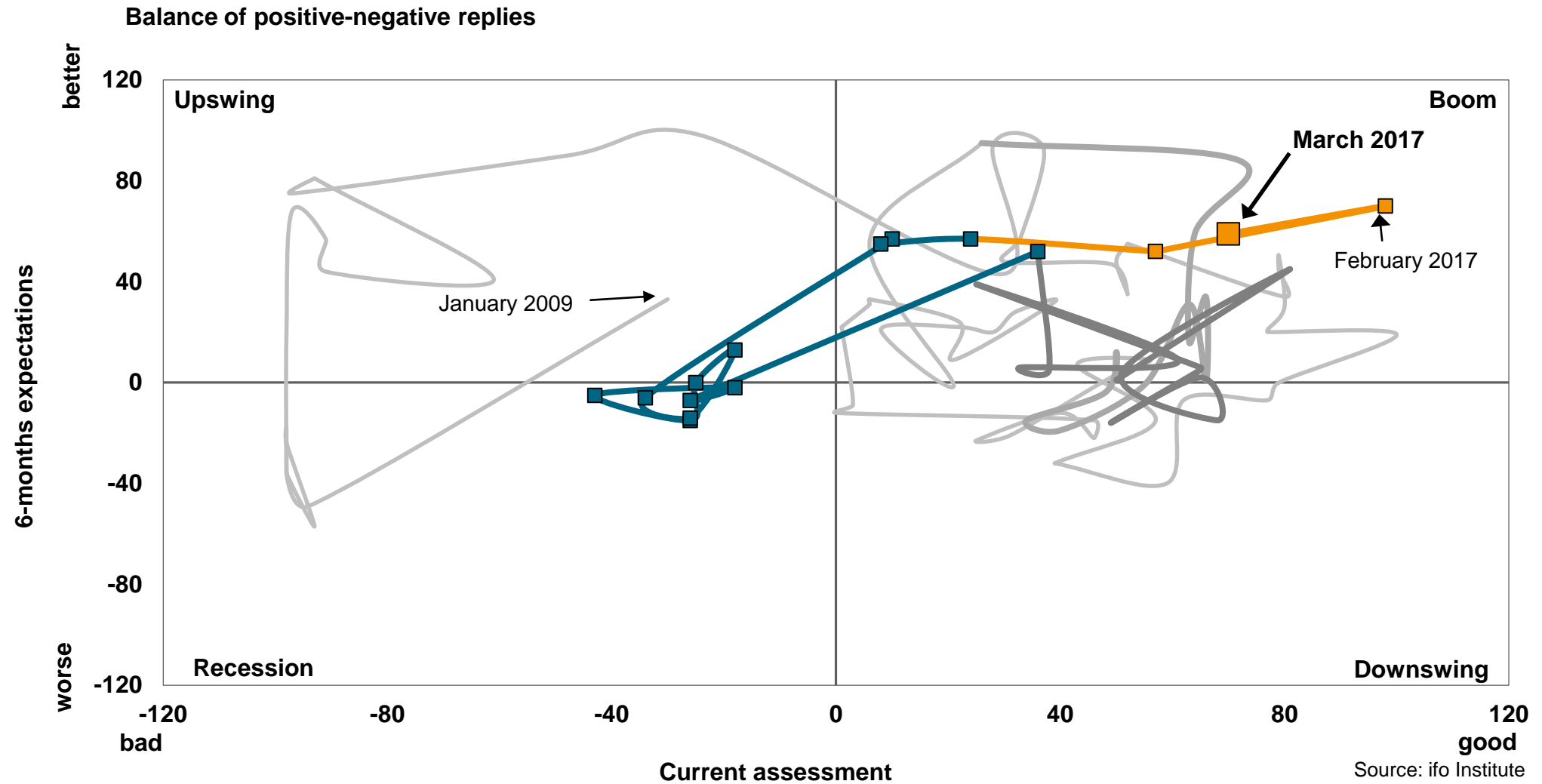
# German Fluid Power Industry

## Ifo business cycle-clock Hydraulics

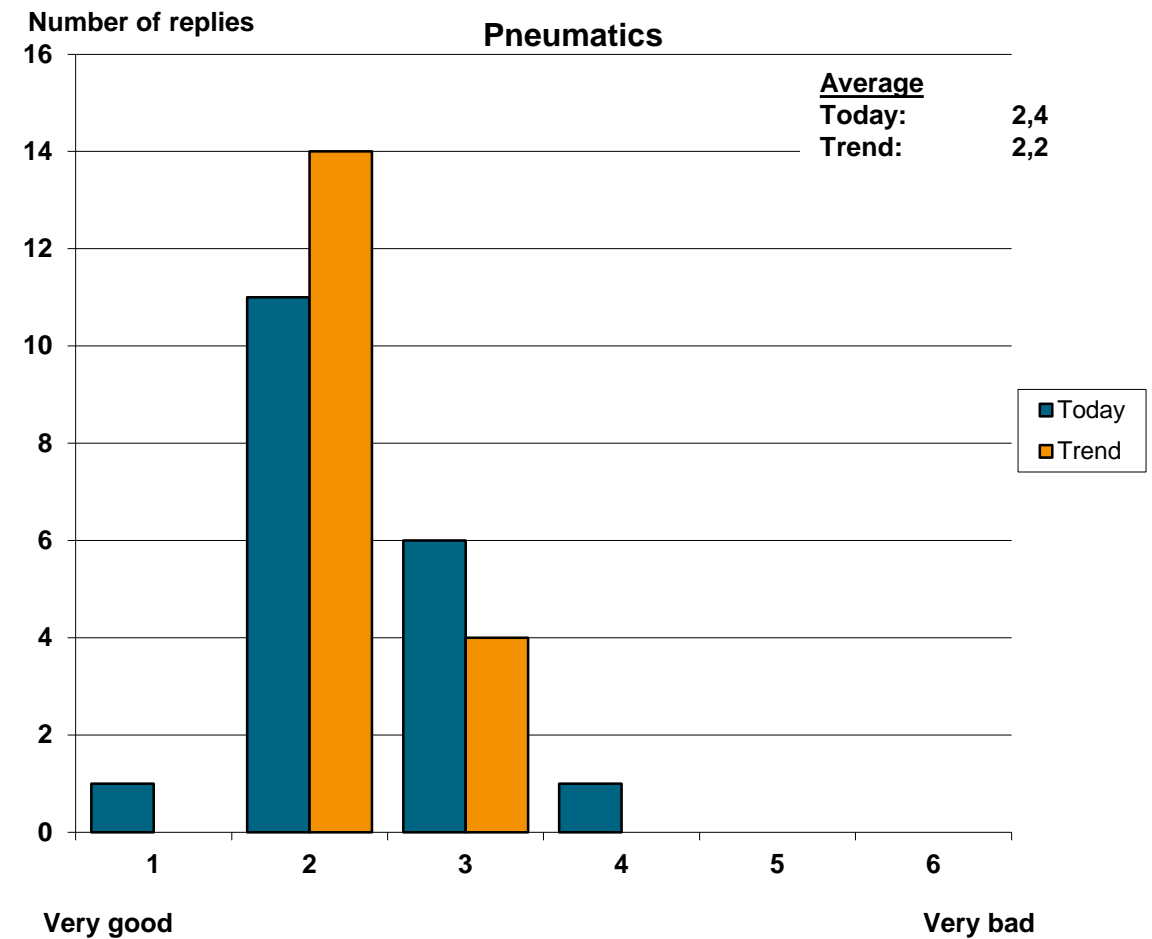
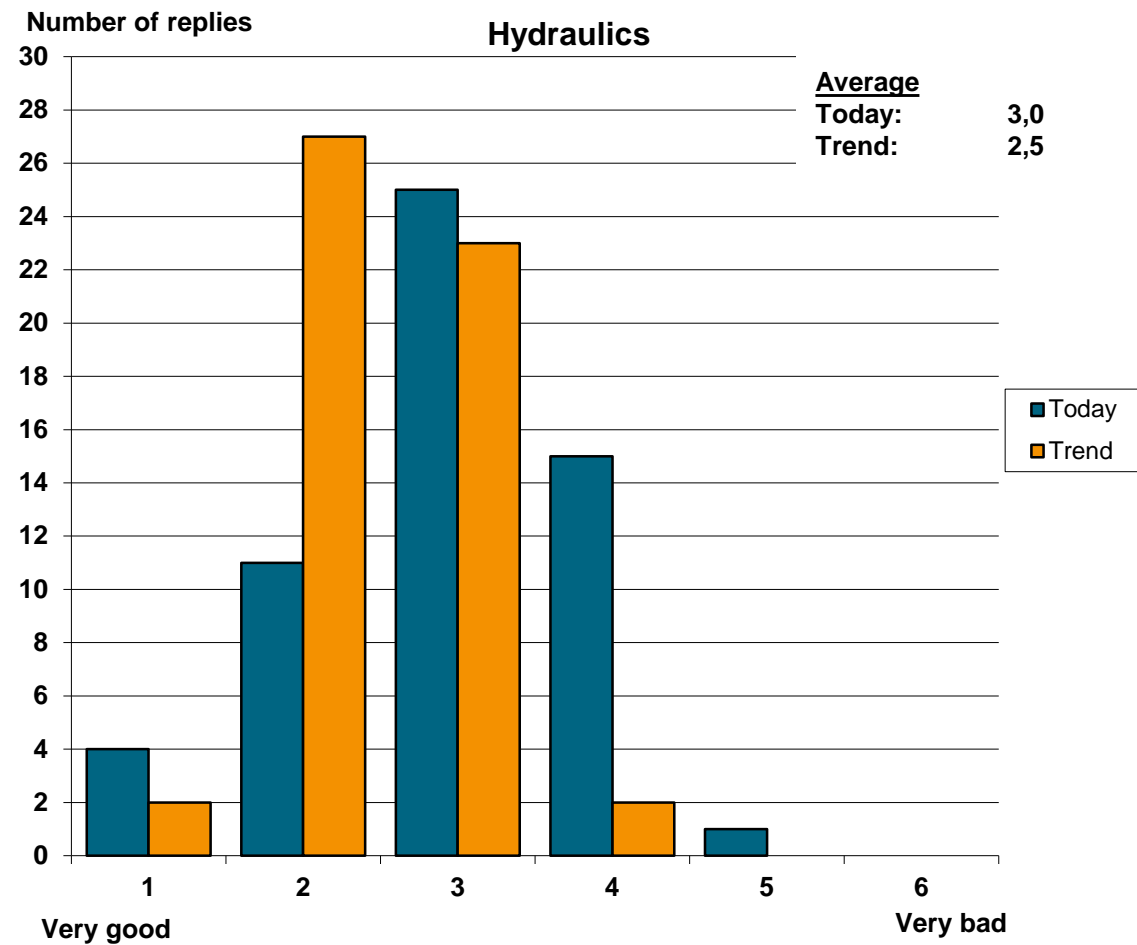


# German Fluid Power Industry

## Ifo business cycle-clock Pneumatics

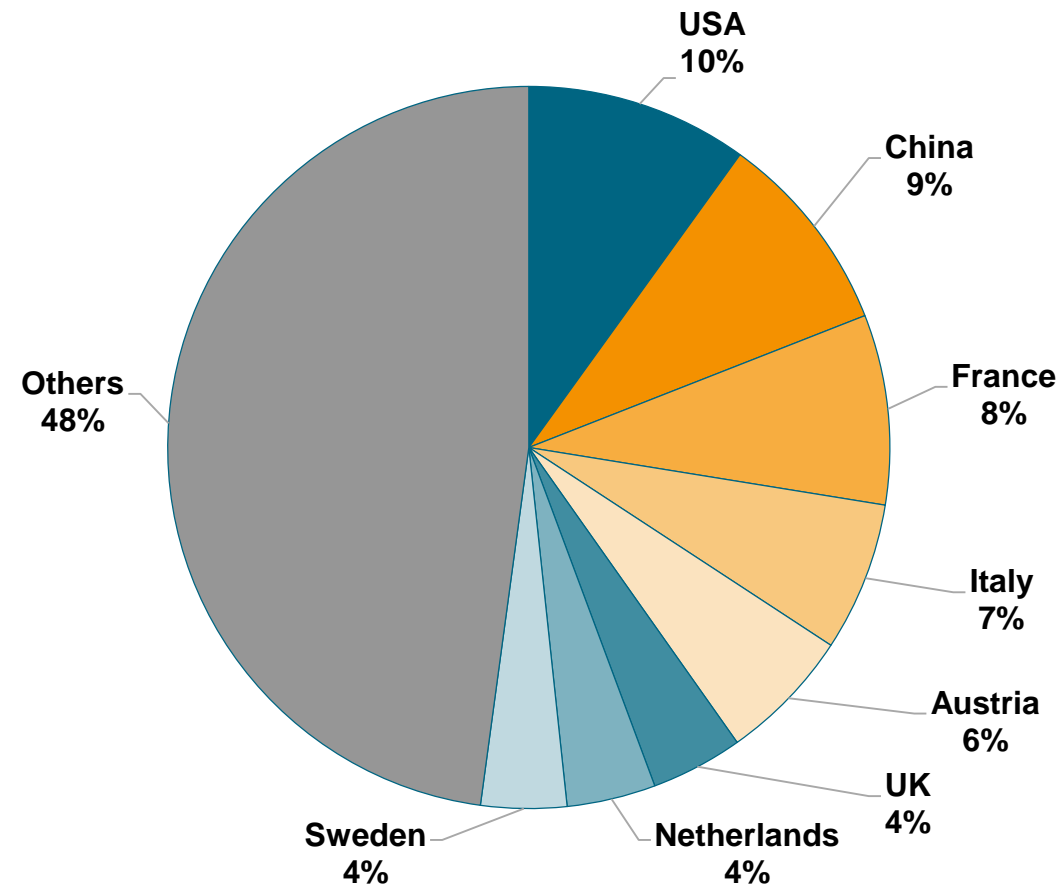


# German Fluid Power Industry Companies' Evaluation on the Situation



# German Fluid Power Exports

## The main customer countries

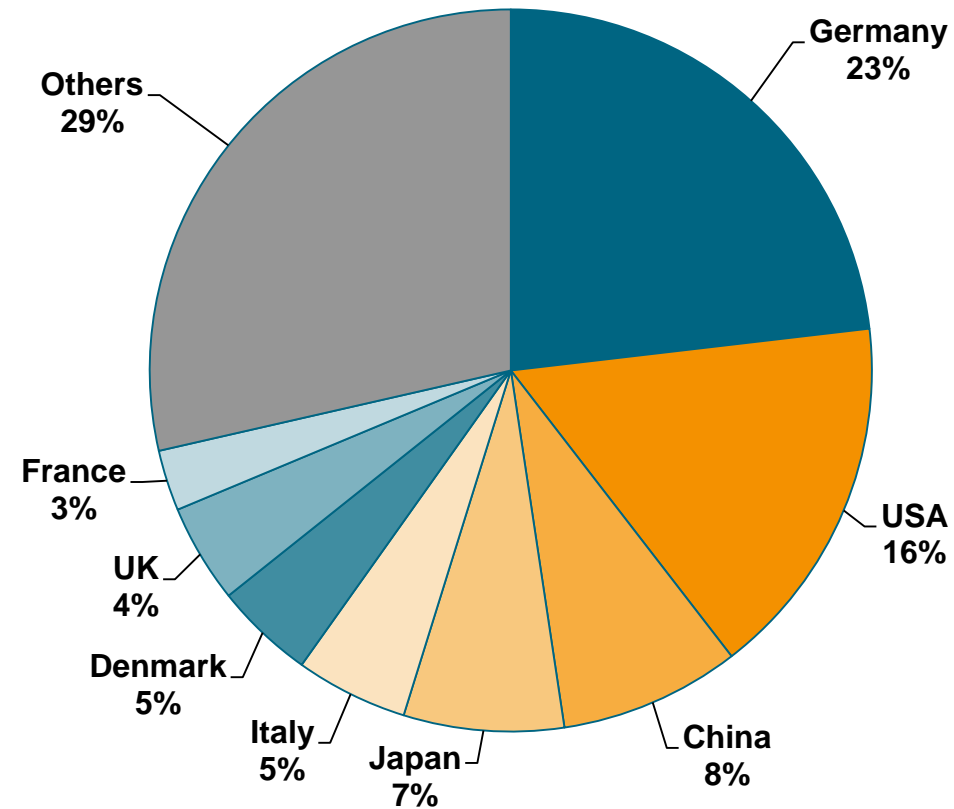


Source: National Statistical Offices, VDMA



# Global Fluid Power Exports

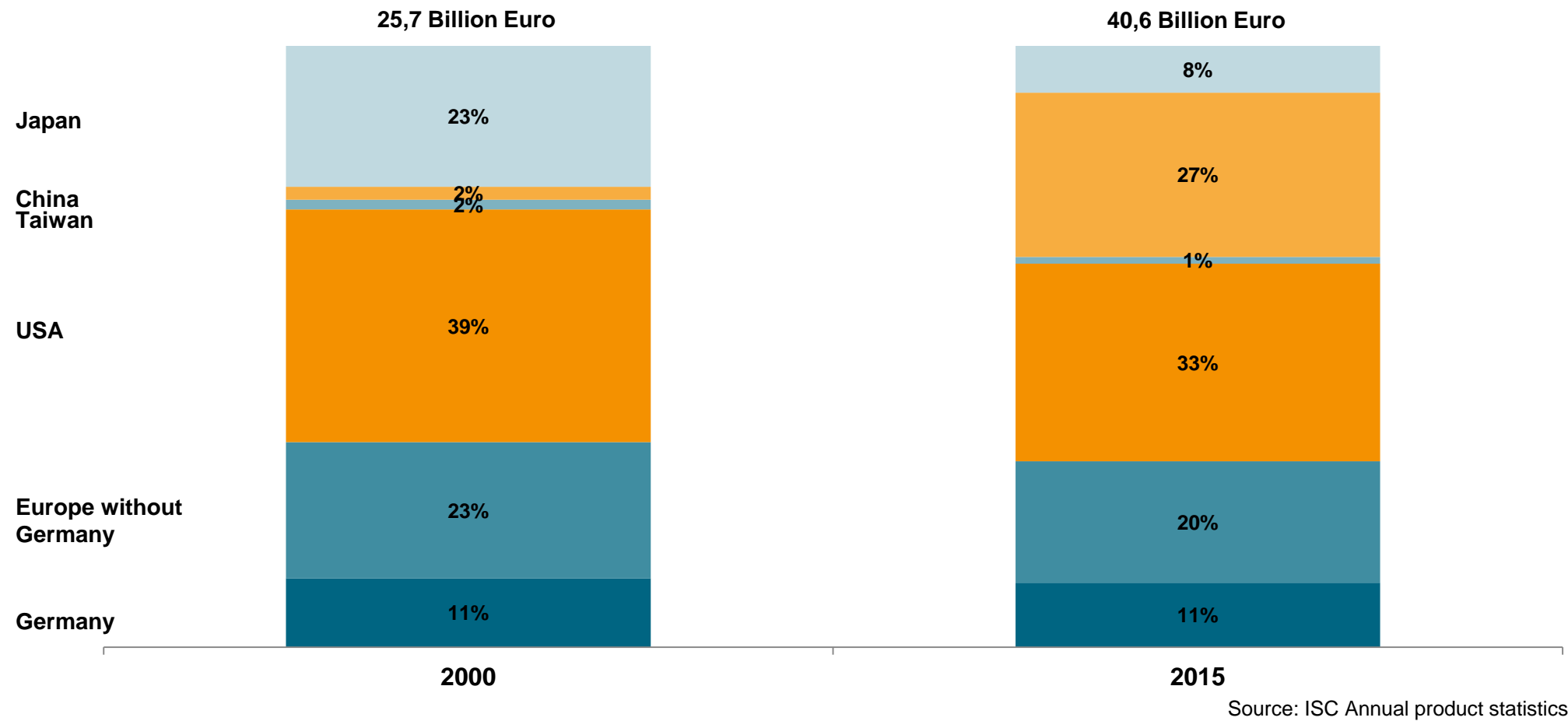
## The most important supplier countries



Source: National Statistical Offices, VDMA

# National Home Sales Worldwide

## Fluid Power



# Facts on Fluid Power



## Fluid Power Association within VDMA

- » about 200 member companies in the German Fluid Power Association with
- » 6.9 Billion Euro turnover
  - Hydraulics: 4.4 Billion Euro
  - Pneumatics: 2.5 Billion Euro
- » export ratio: 53%
- » representing about 85% of the German fluid power market
  
- » Member of CETOP, the European umbrella association for fluid power
  - President: Stefan König, Danfoss Power Solutions, 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



Source: VDMA



**Thank you**  
**Thank you**  
for your participation!