

International Fluid Power Summit

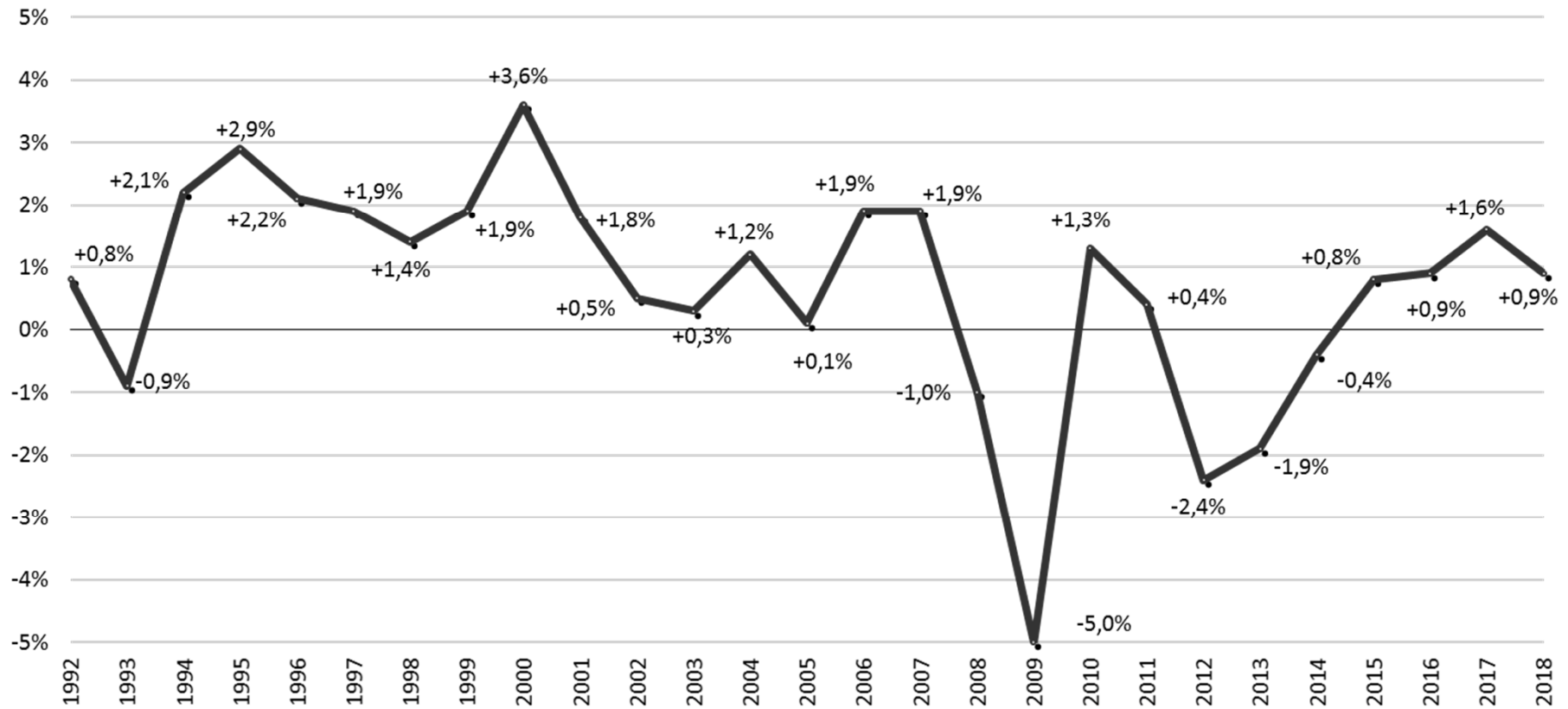


The economic situation in Italy



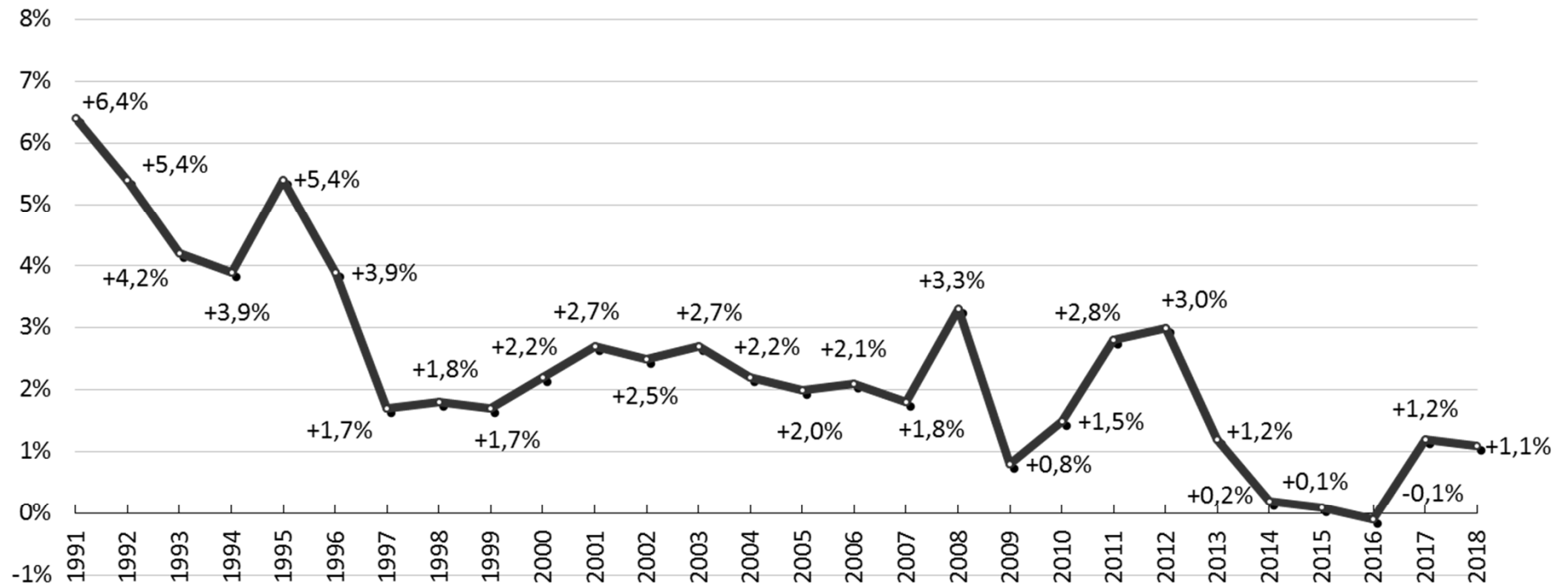
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GDP in Italy (1992-2018)



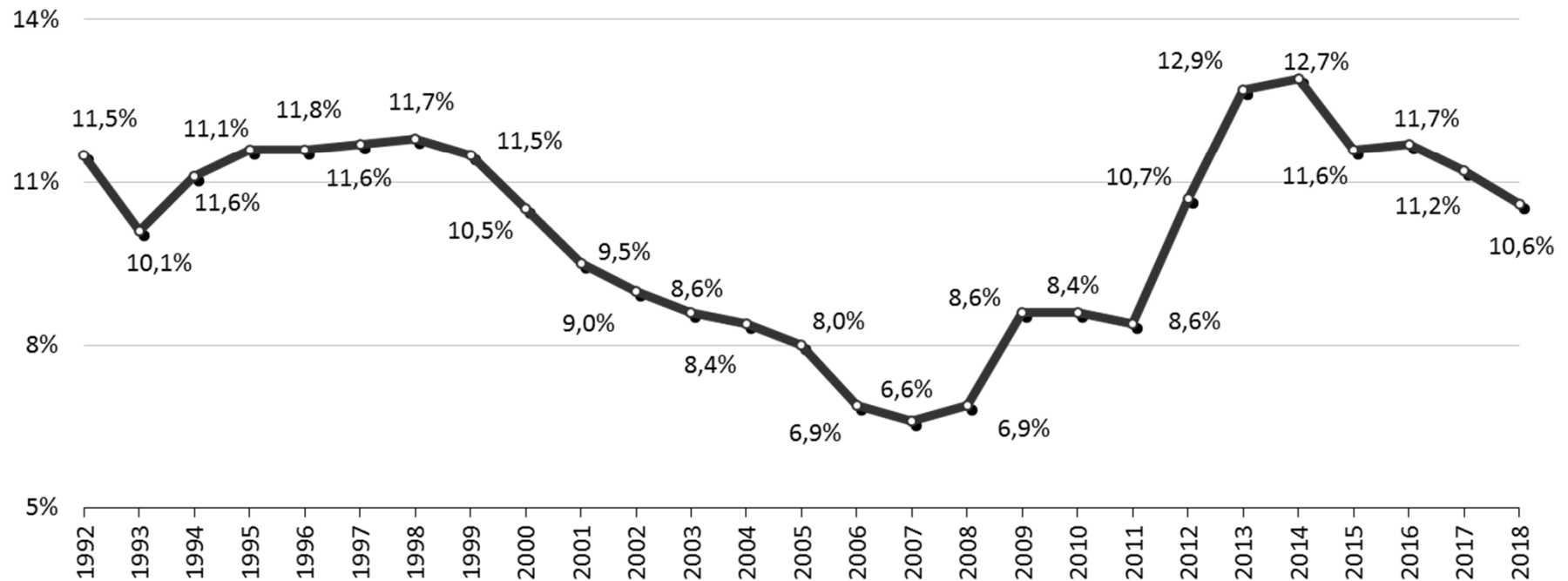
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Inflation in Italy (1992-2018)



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Unemployment rate in Italy (1992-2018)



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Assofluid Quarterly Economic Survey

12 months 2018 / 12 months 2017

	Variation in turnover		Variation in orders	
	HYDRAULICS	PNEUMATICS	HYDRAULICS	PNEUMATICS
Exports	+13,2%	+7,4%	+11,0%	+5,4%
Imports	+16,7%	+4,8%	+9,0%	+2,2%
HOME MARKET	+13,1%	+5,6%	+10,9%	+3,4%
Production	+12,5%	+7,1%	+11,3%	+5,2%



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Italian Fluid Power Industry estimation 2018

HYDRAULICS	2018	% 18/17
Export	1.974	+13,2%
Import	580	16,7%
Home Market	1.547	+13,1%
Production	2.941	+12,5%

PNEUMATICS	2018	% 18/17
Export	489	+7,4%
Import	480	+4,8%
Home Market	860	+5,6%
Production	869	+7,1%

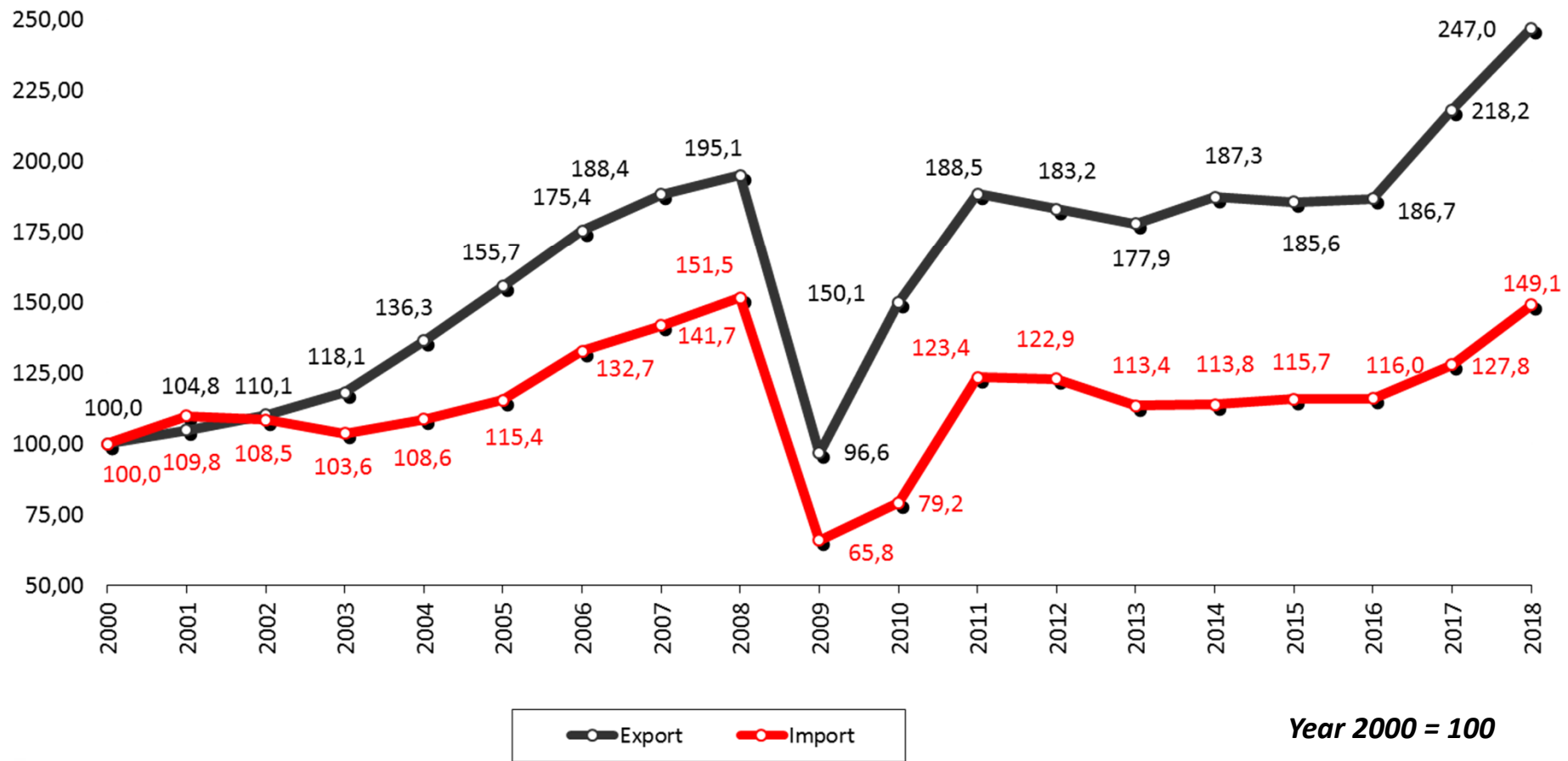
FLUID POWER	2018	% 18/17
Export	2.463	+12,0%
Import	1.060	+11,0%
Home Market	2.406	+10,3%
Production	3.809	+11,2%

€ millions



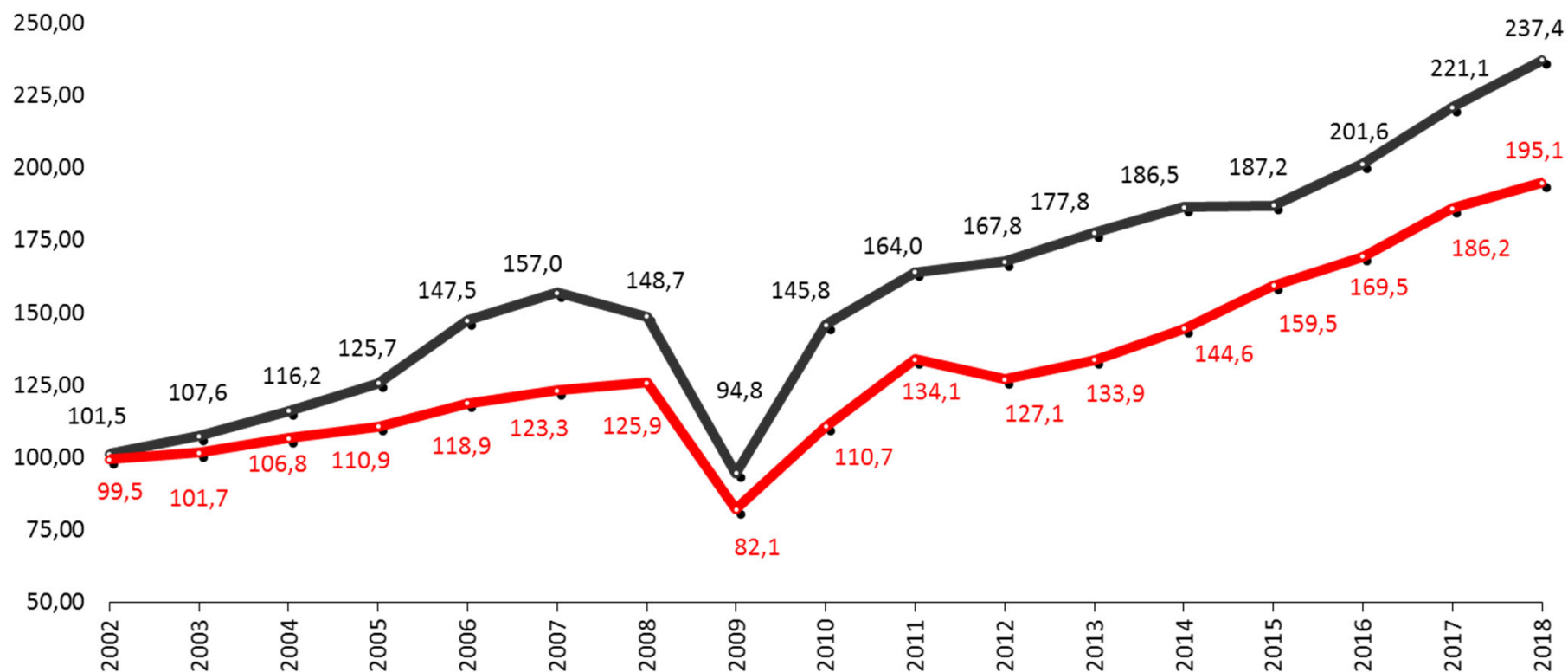
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Hydraulics Index (2000-2018)



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Pneumatics Index (2000-2018)



● Serie1 ● Serie2

Year 2000 = 100



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Italian Industry - Preliminary results 2018

Fluid power end-use markets	HOME MARKET % 2018/2017
Machine tools, robots and automation	+25,9%
Agricultural machinery	-18,8%
Construction machinery	+16,0%
Packaging machinery	+7,5%
Textile machinery	-8,0%
Woodworking machinery	+18,9%



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