

Importance of China for the fluid power, motion and drives industry

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within VDMA

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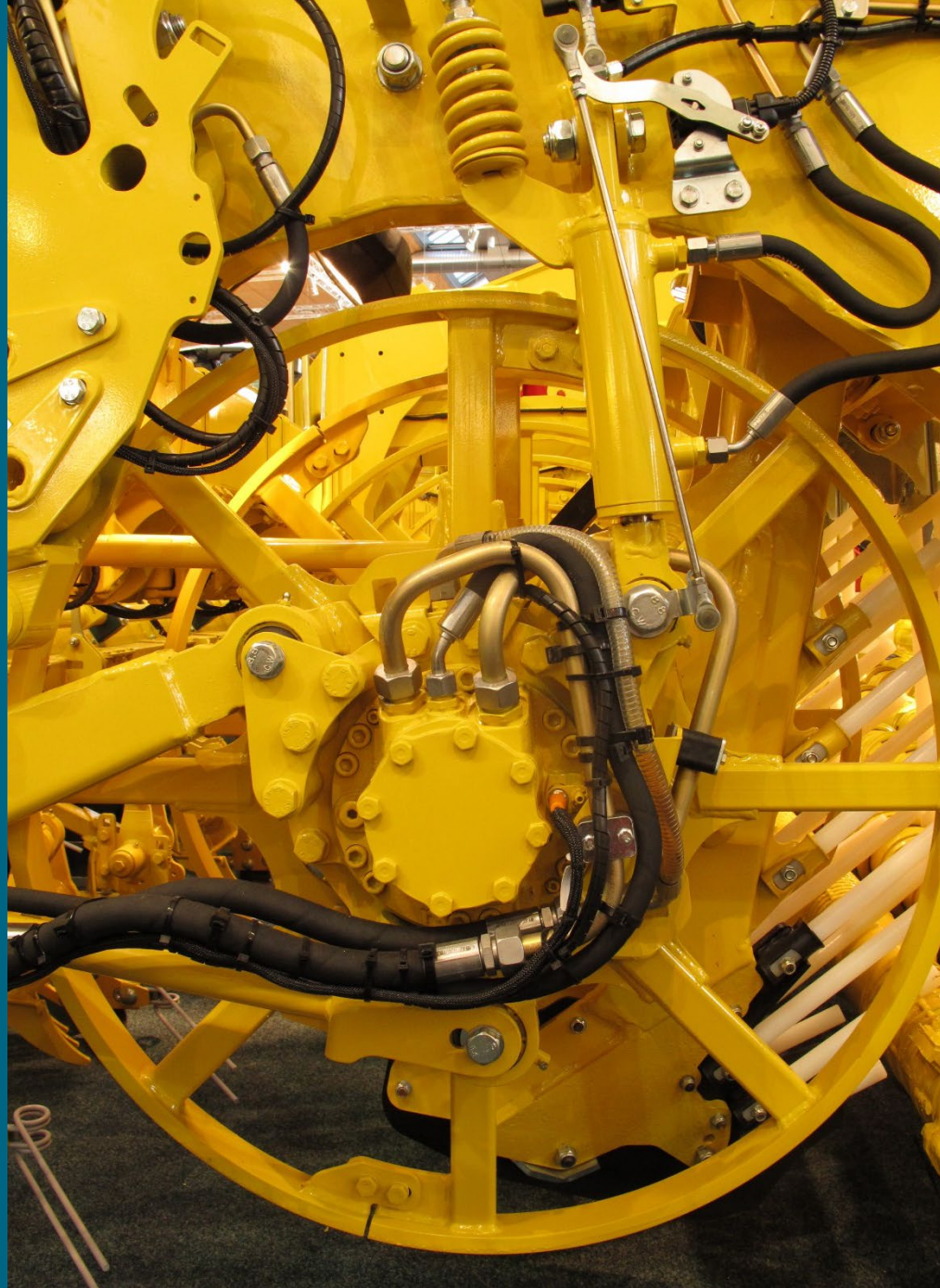


German Fluid Power

The Association – the industry

- » 215 member companies
- » Turnover: 8.2 Billion Euro
 - Hydraulics: 5.4 Billion Euro
 - Pneumatics: 2.8 Billion Euro
- » Export ratio: 57%
- » 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 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





Mechanical engineering ...

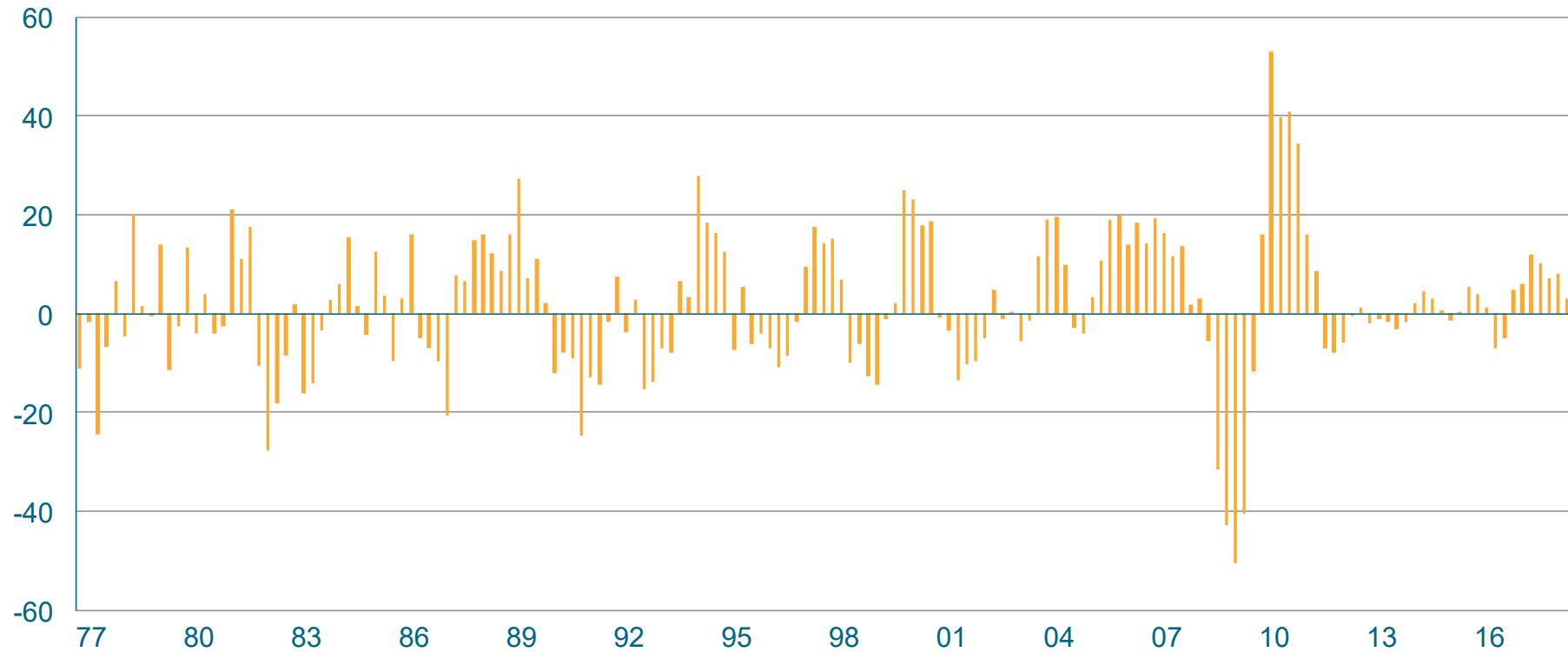
Fluid Power ...

Trading partner China ...

German mechanical engineering Orders



Real change rate to the previous year's quarter in percent



Source: VDMA

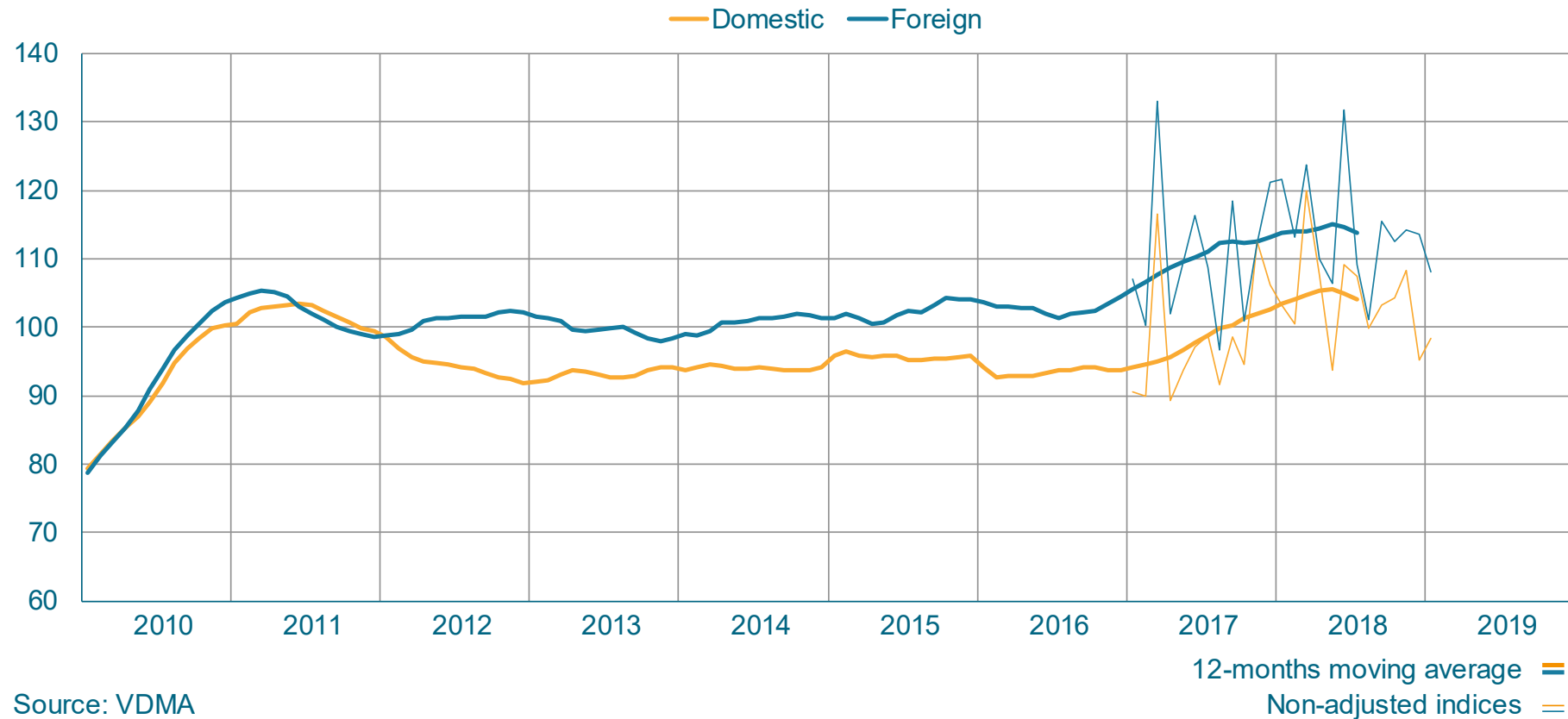
Up to 1991 only Western Germany.

German mechanical engineering

Incoming orders



Volume index 2015 = 100

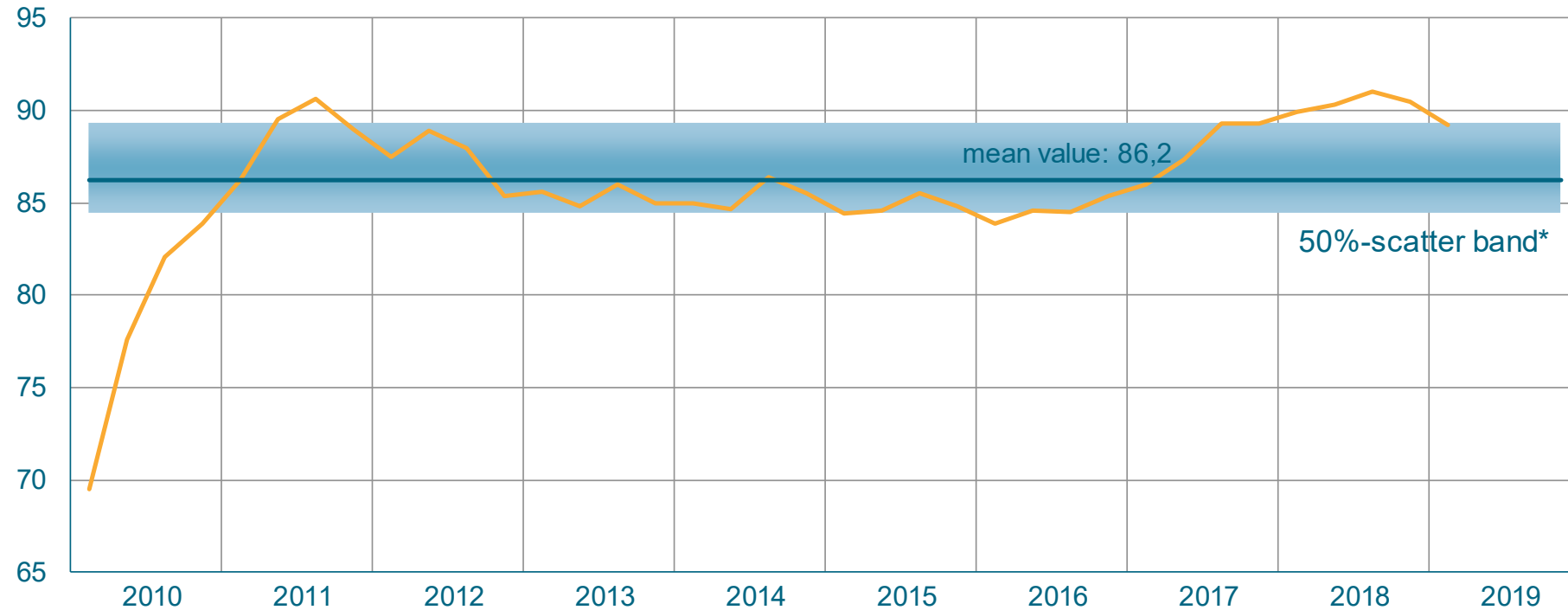


Source: VDMA

German mechanical engineering Capacity utilization



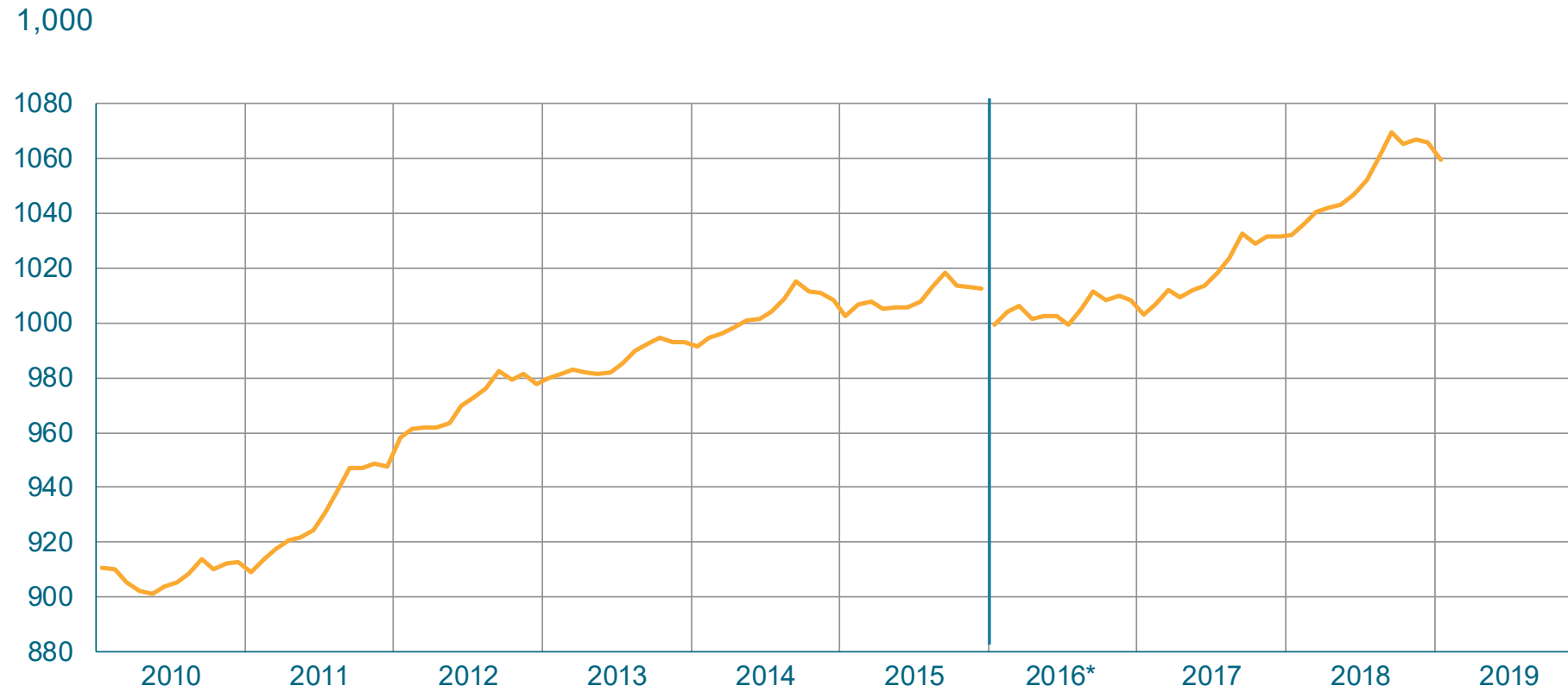
% of full capacity level of output



Source: ifo-Institut, VDMA

*) 50% of all observations (since 1995) are located within a scatter band of 84.5 to 89.3 %.

German mechanical engineering Employees



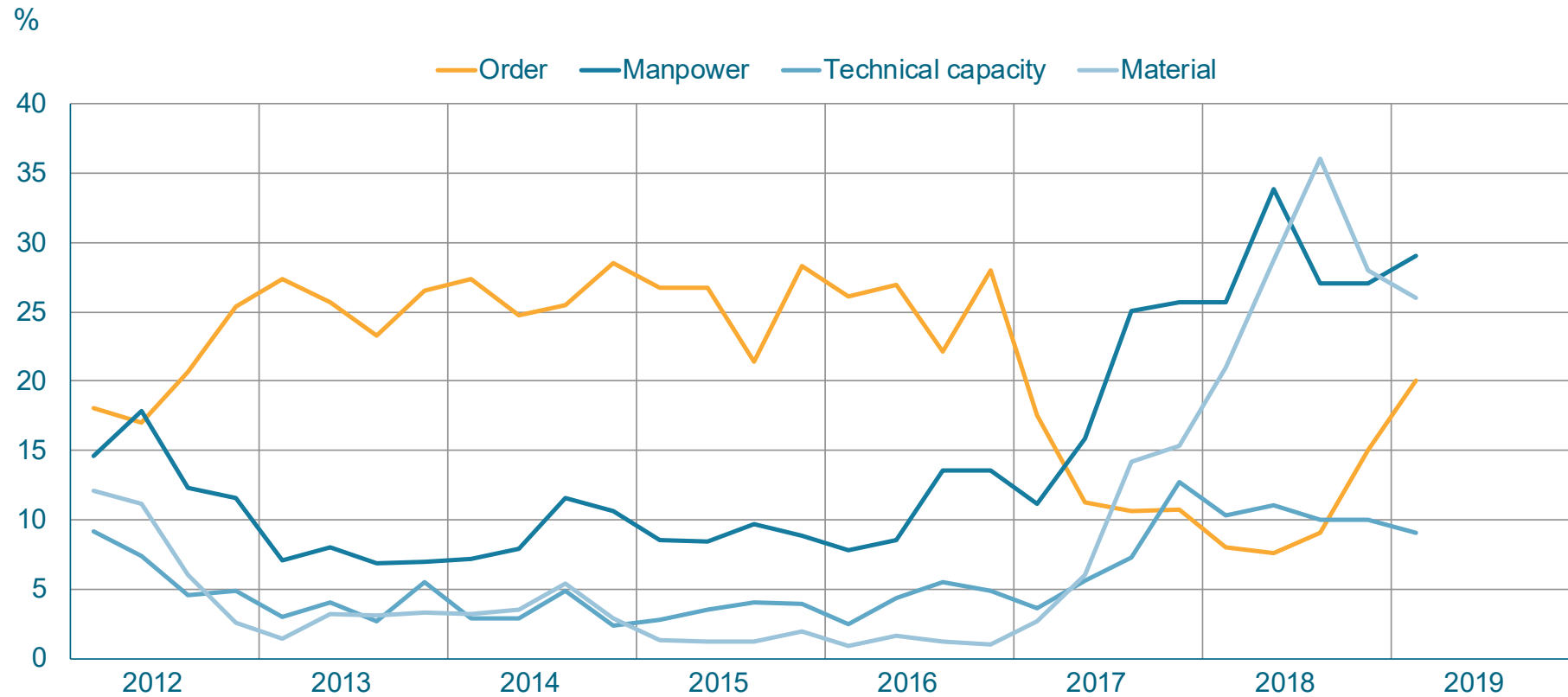
*) Due to a change in classification, 2016 is not comparable to previous years.

Source: Federal Stat. Office Germany, VDMA

Employees in units with 50+ employees.

German mechanical engineering

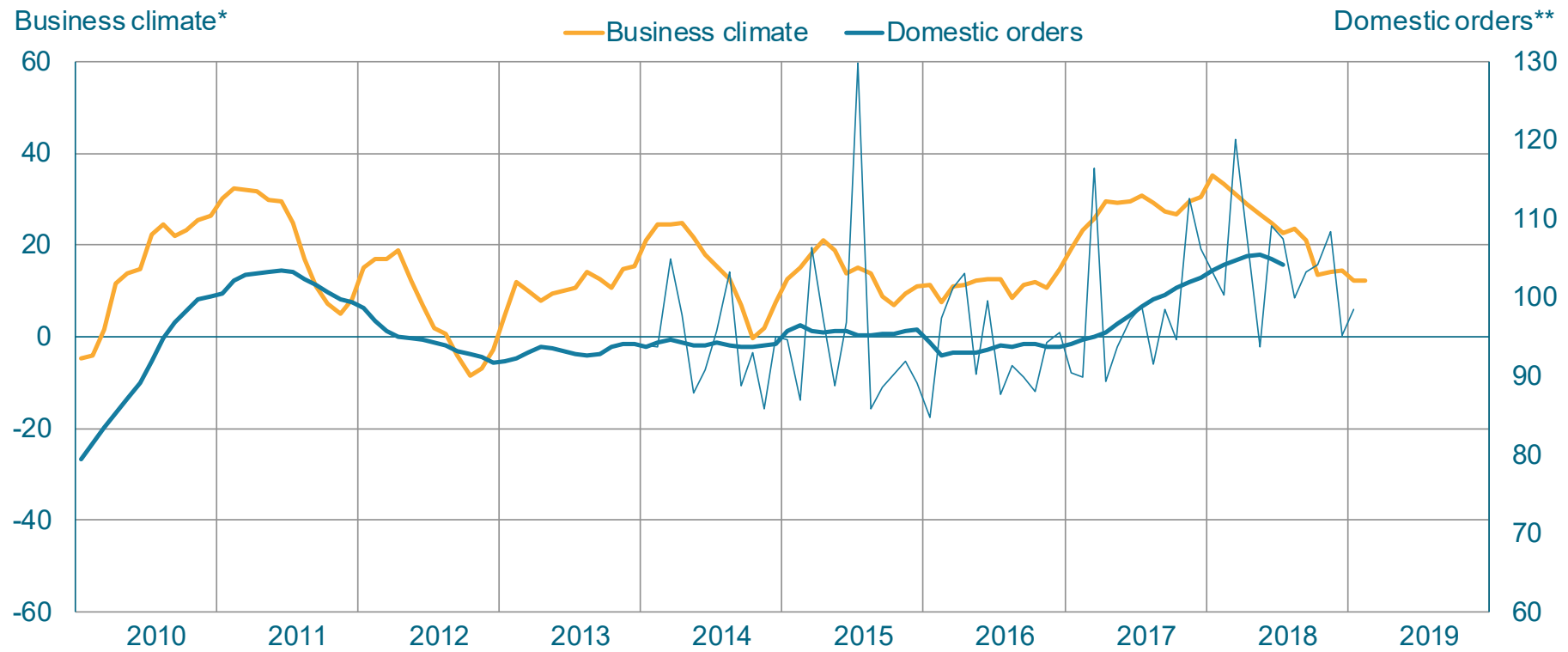
Limitation of production due to a lack of ...



Source: ifo-Institut, VDMA

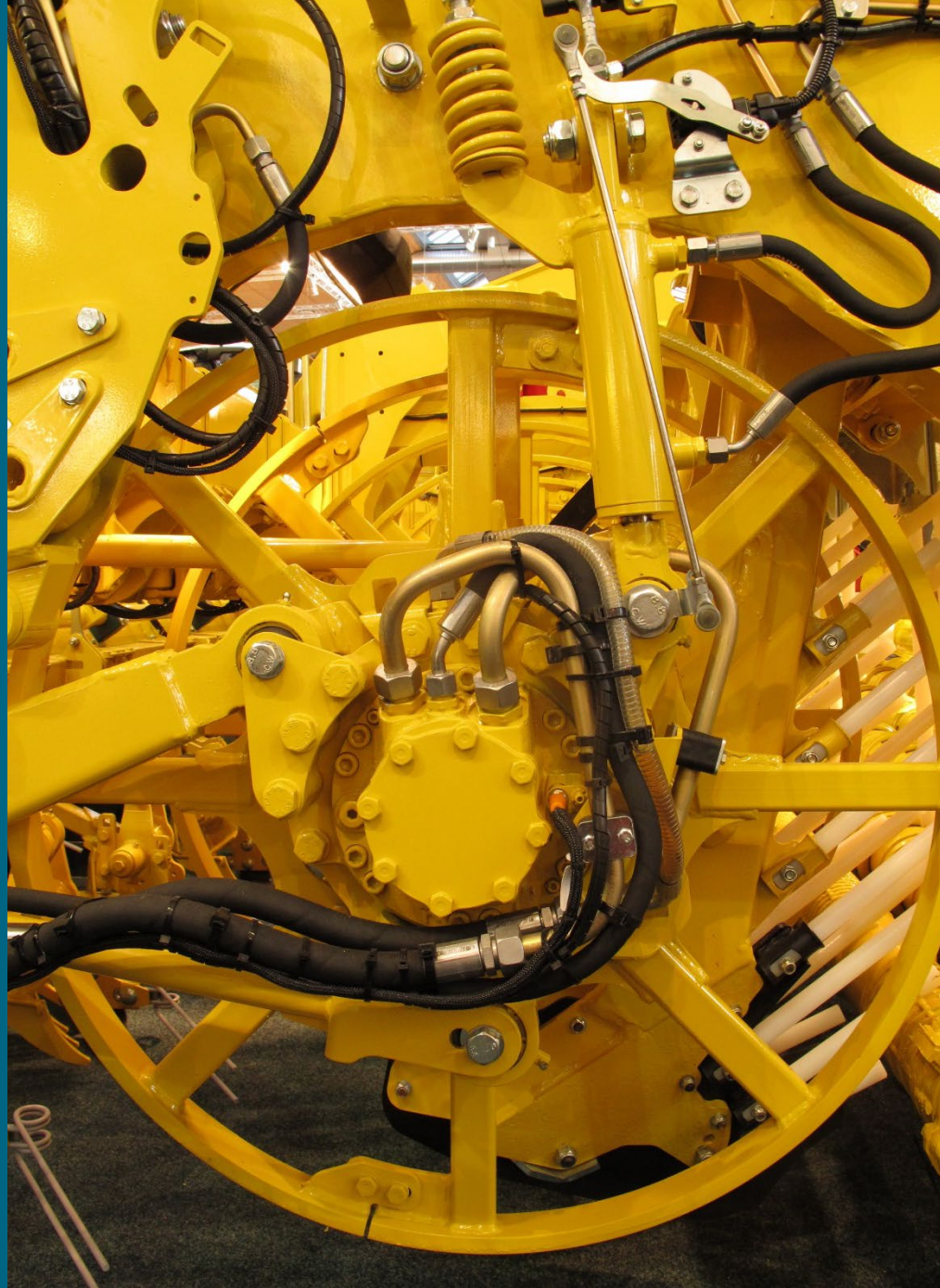
German mechanical engineering

Orders and business climate in German industry



Source: ifo-Institut, VDMA

*) Balance.
**) Volume index, 12 months moving average.



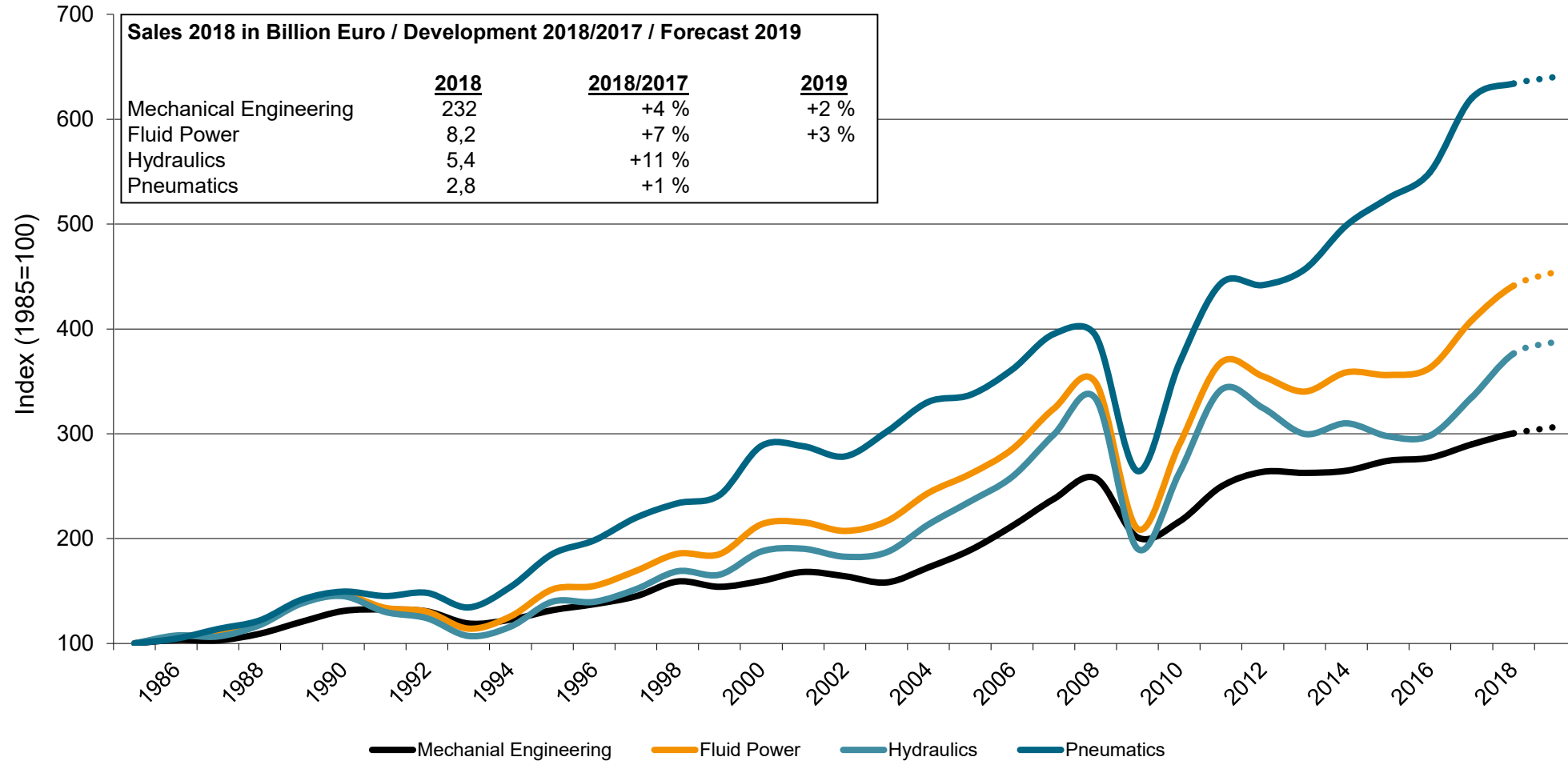
Mechanical engineering ...

Fluid Power ...

Trading partner China ...

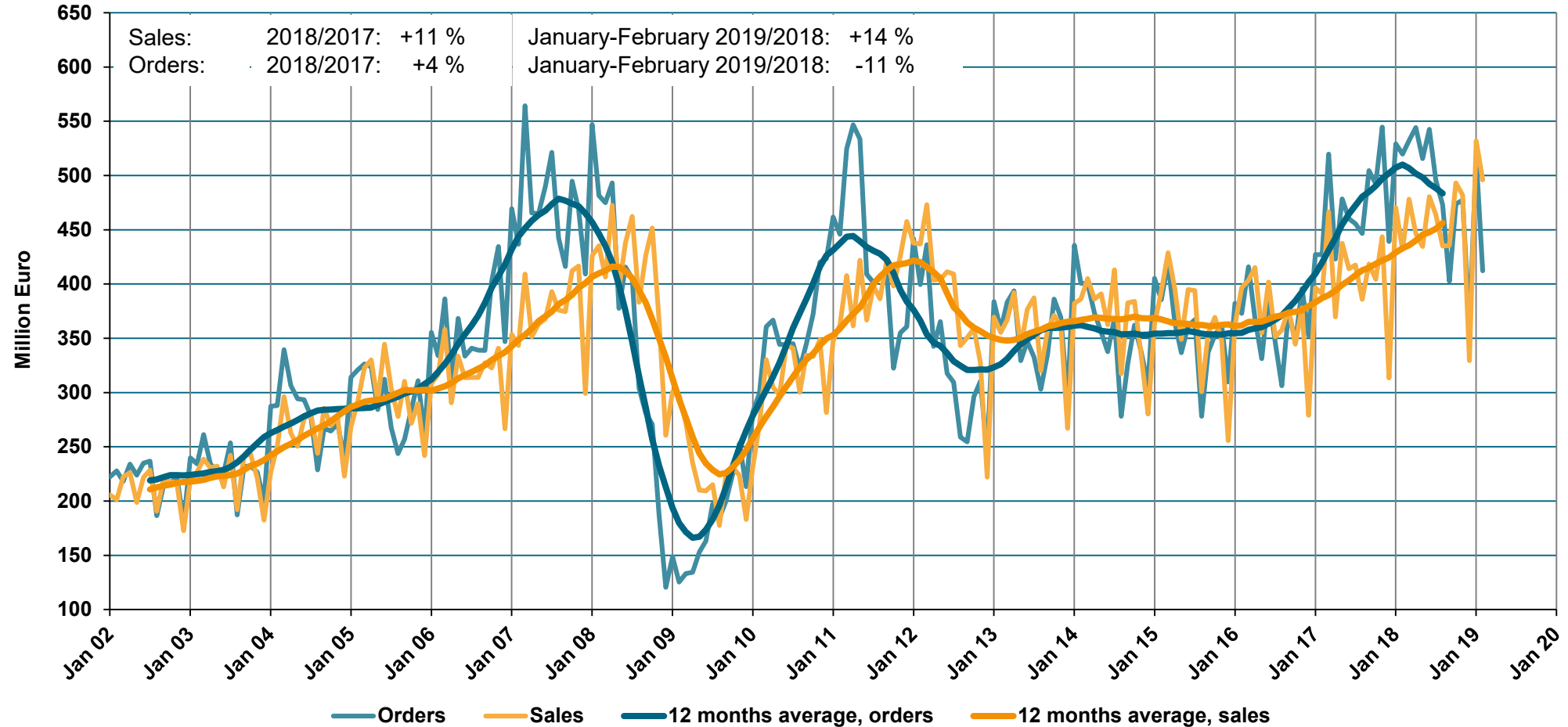
Sales Development

Mechanical Engineering / Fluid Power / Hydraulics / Pneumatics



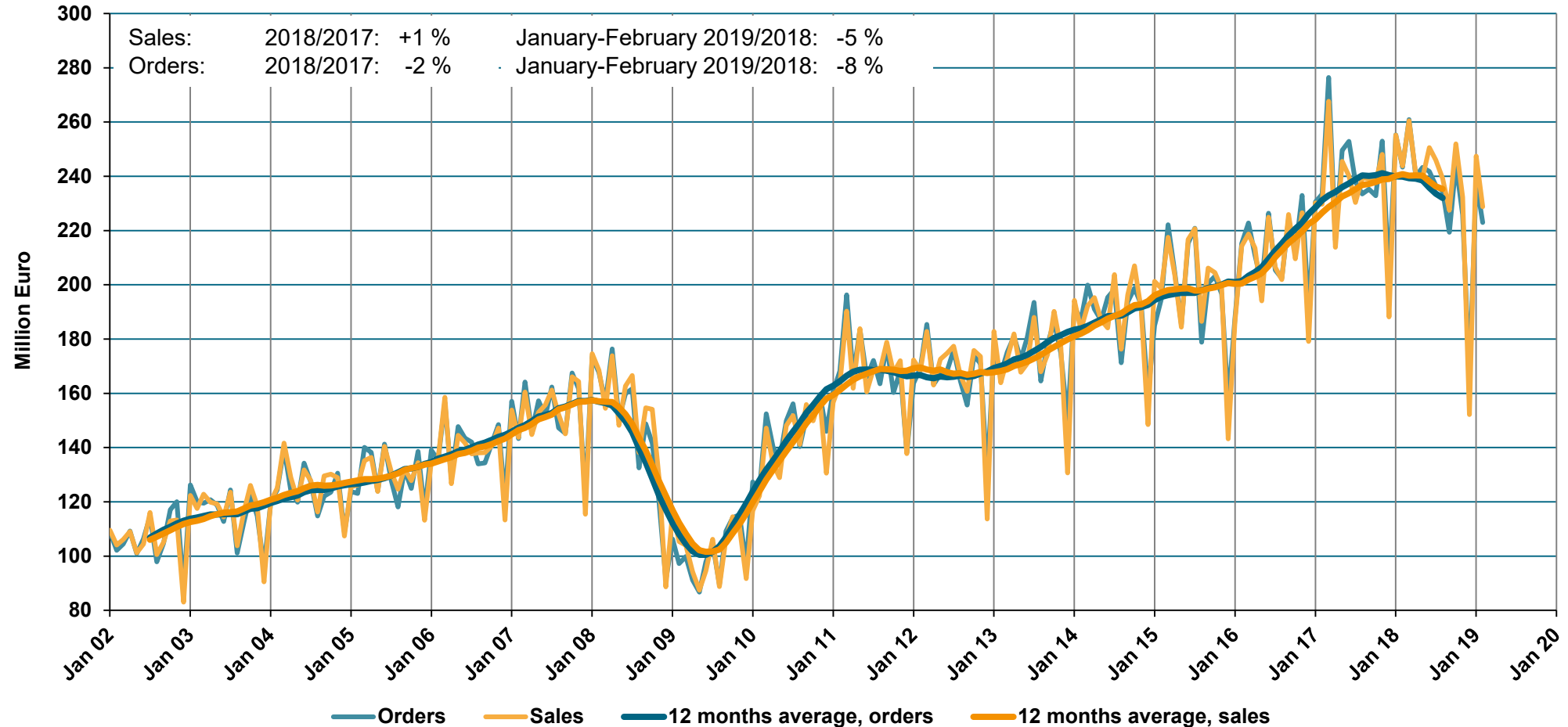
Source: VDMA

Hydraulics Sales and Orders



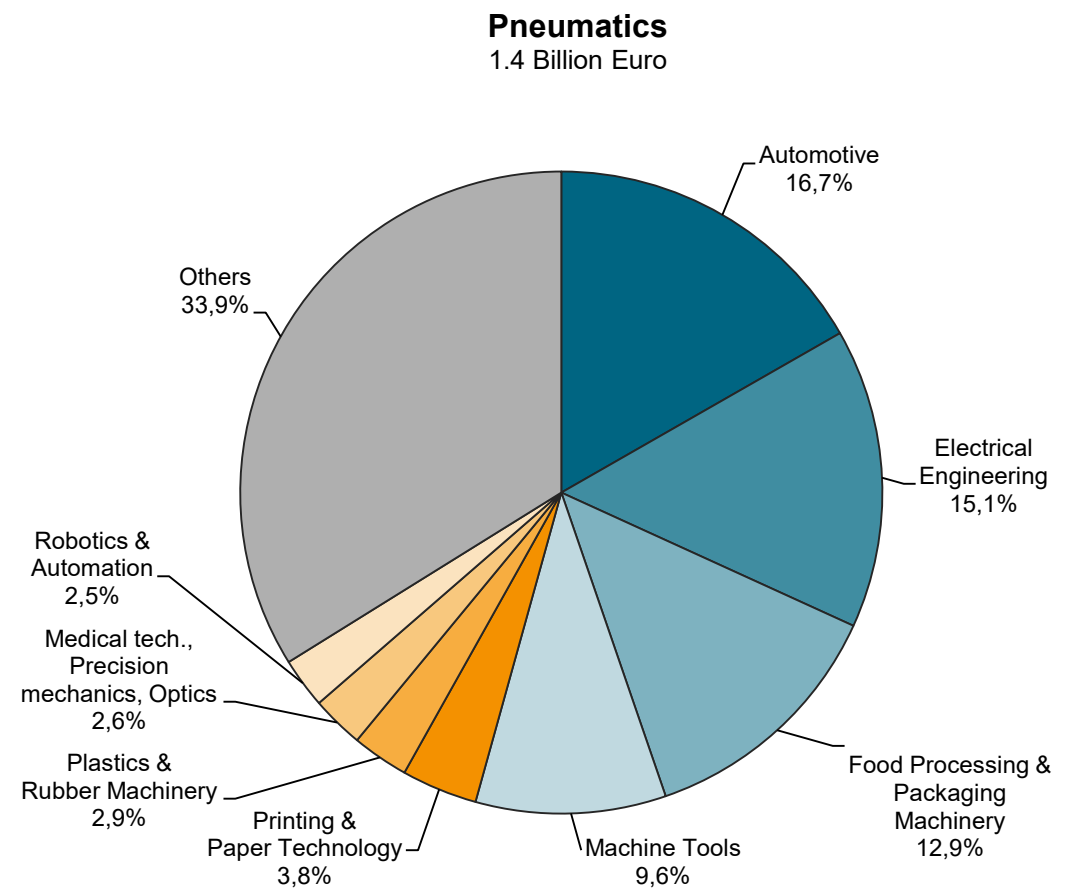
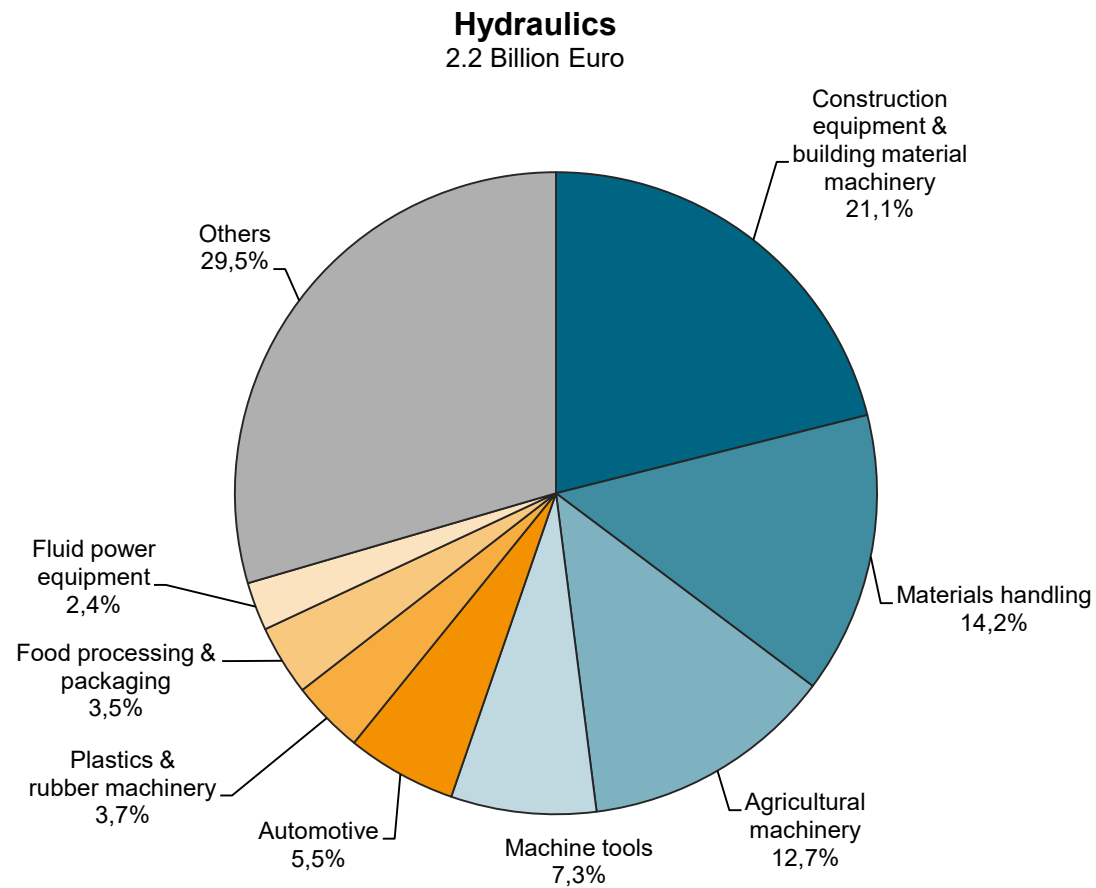
Source: VDMA

Pneumatics Sales and Orders



Source: VDMA

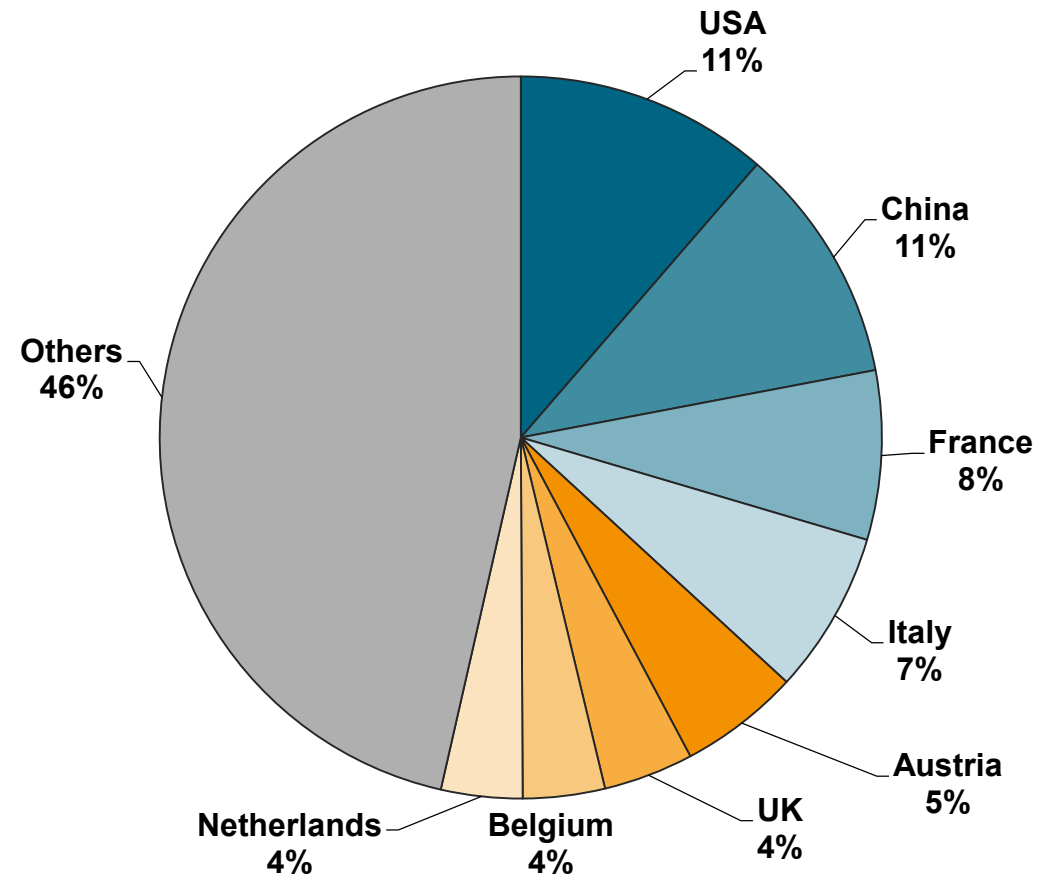
The main Customer Markets Fluid Power in % of the domestic sales



Source: VDMA

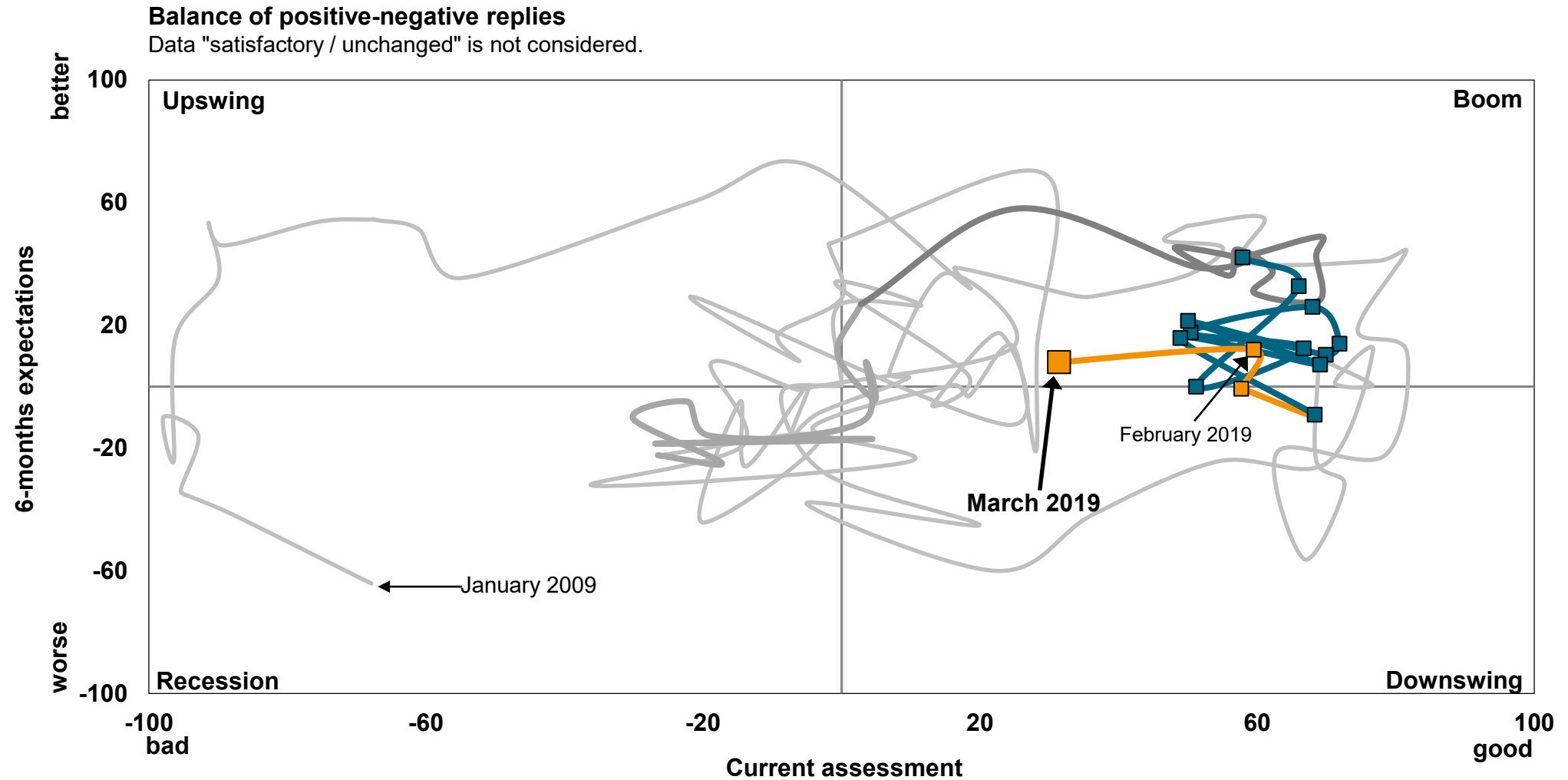
German Fluid Power Exports

The main customer countries



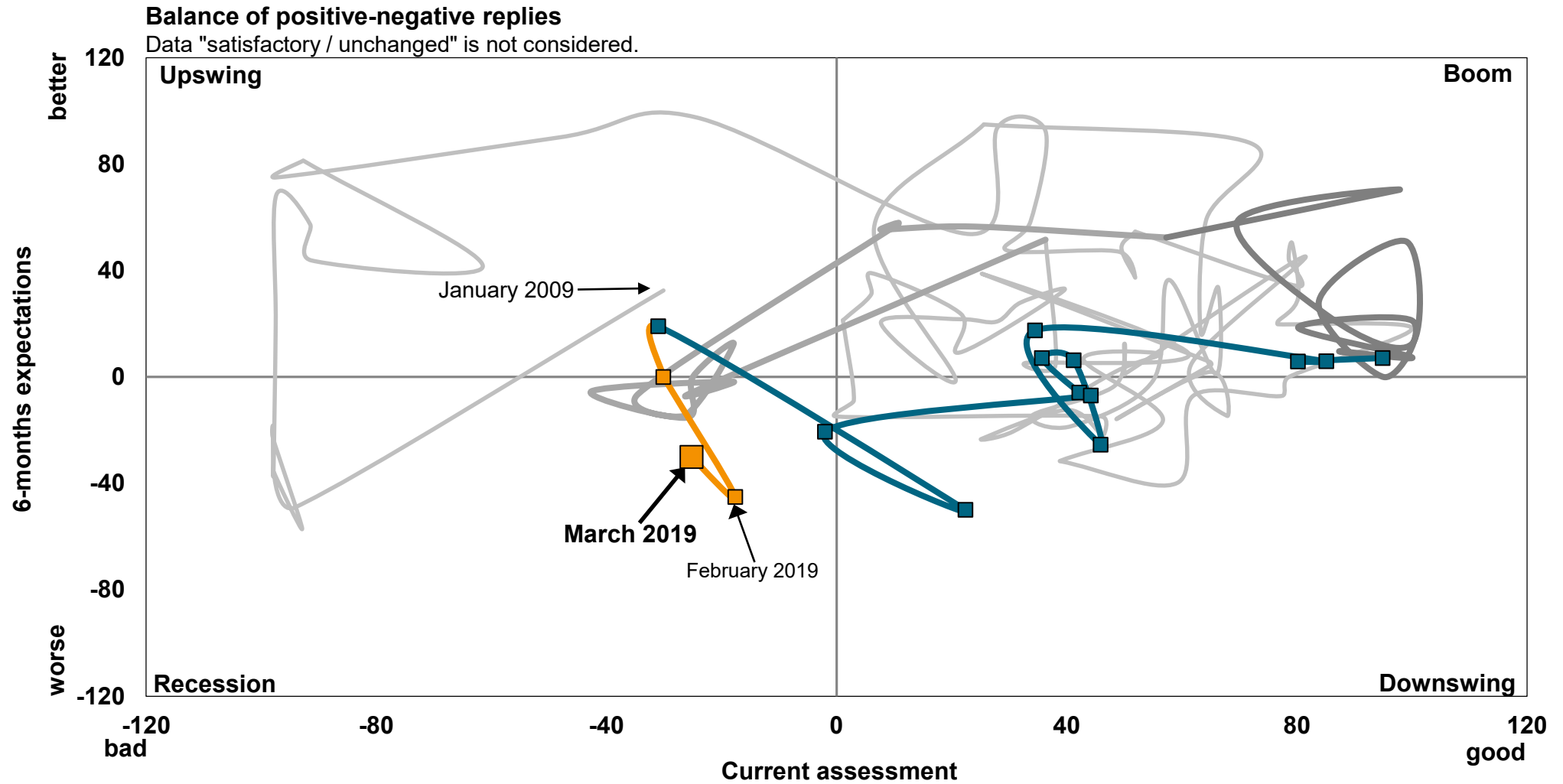
Source: National Statistical Offices, VDMA

Ifo Business Cycle Clock Hydraulics

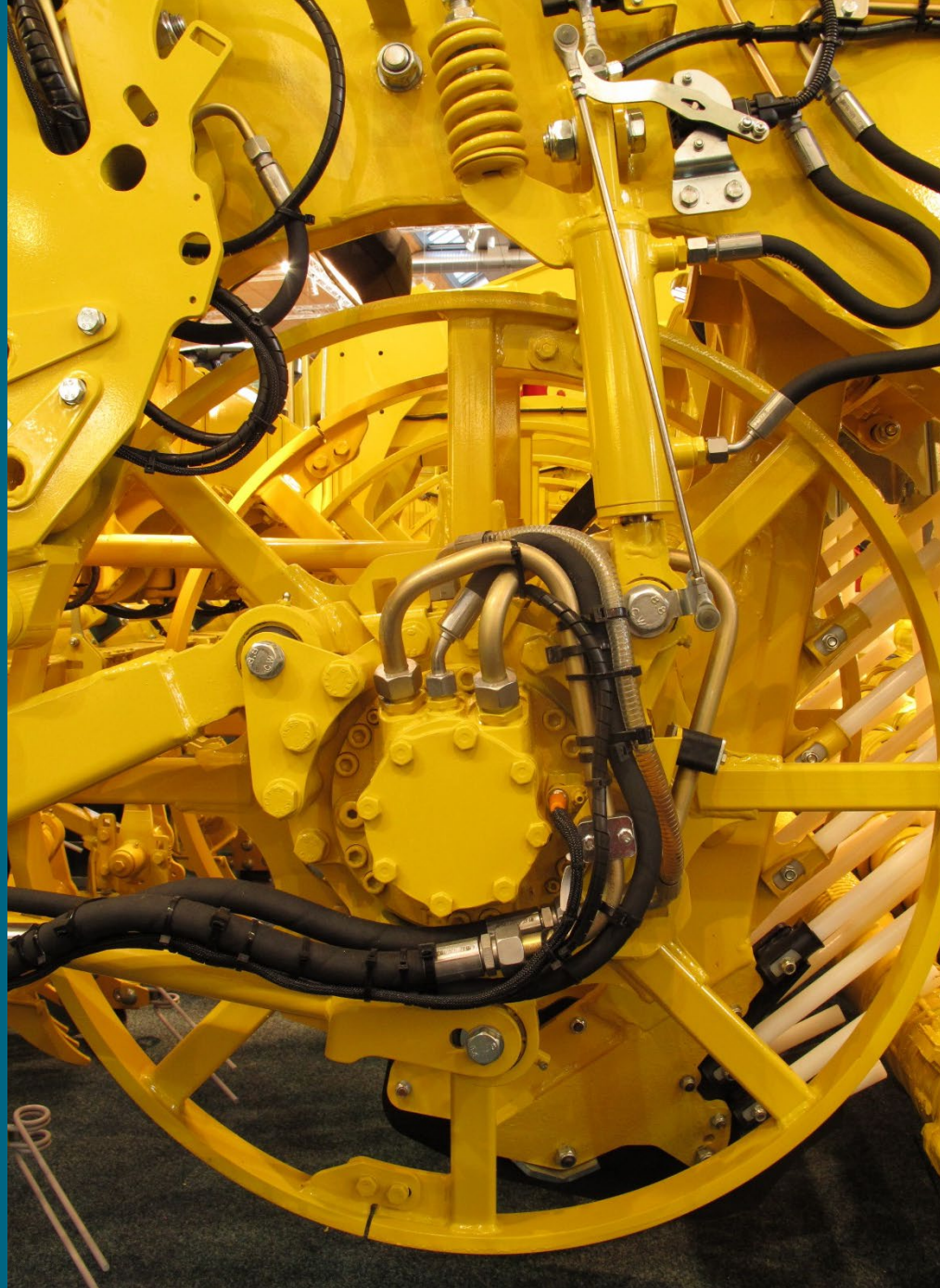


Source: ifo Institut, VDMA

Ifo Business Cycle Clock Pneumatics



Source: ifo Institut, VDMA



Mechanical engineering ...

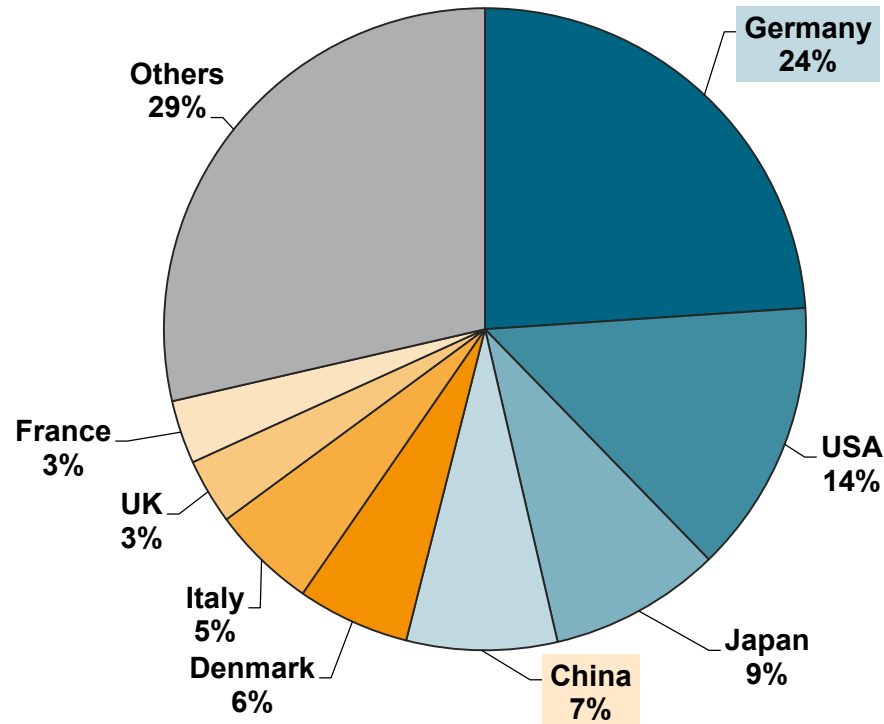
Fluid Power ...

Trading partner China ...

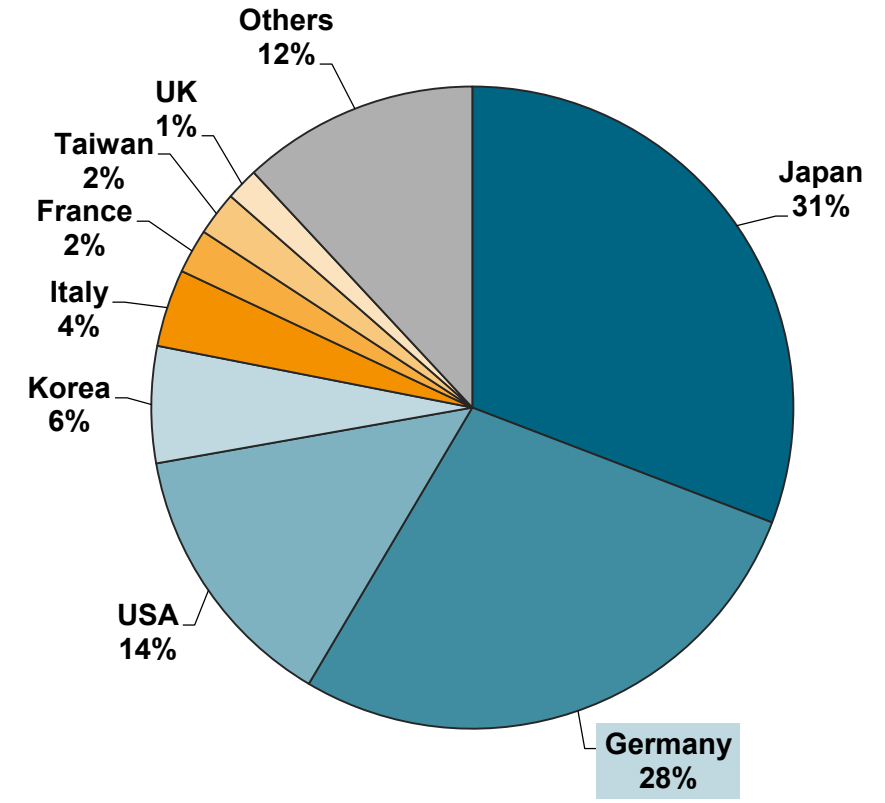
Global Fluid Power Exports

The most important supplier countries

Global Exports – Worldwide
2017: 27.9 Billion Euro



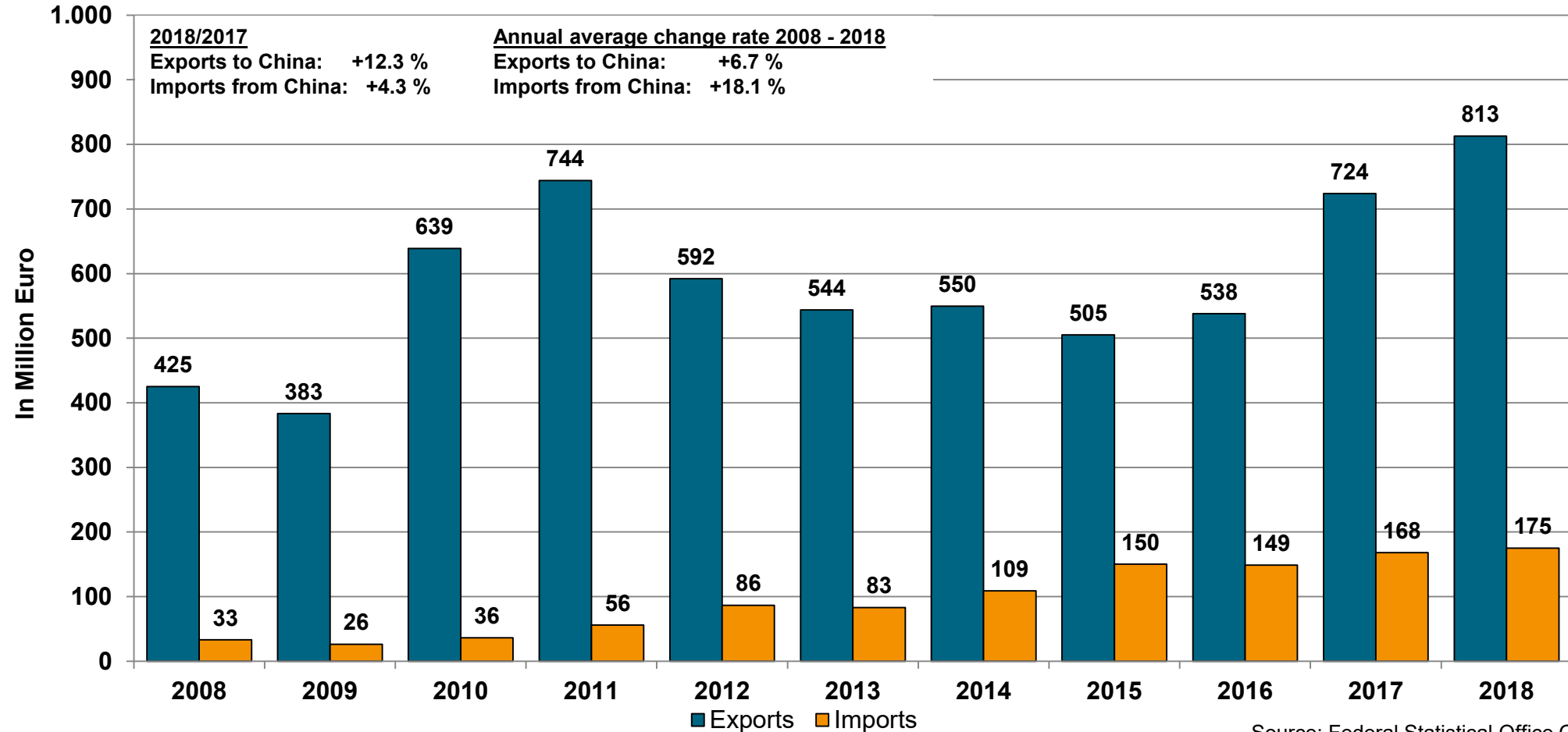
Global Exports to China
2017: 2.6 Billion Euro



Source: National Statistical Offices, VDMA

German and Chinese Fluid Power Trade

Exports to and Imports from China



Source: Federal Statistical Office Germany, VDMA

Thank you
Thank you
for your attention!