

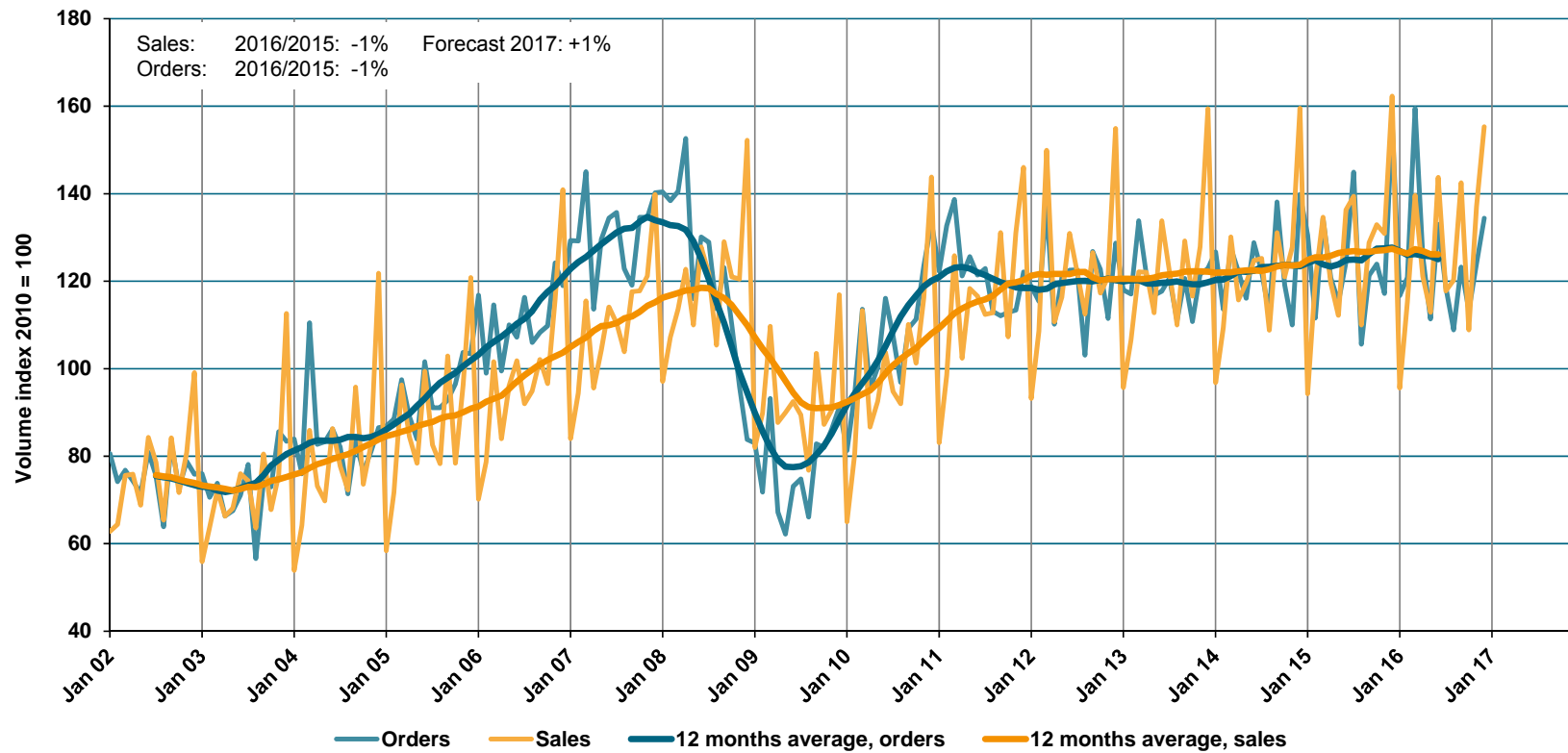


World Fluid Power Summit Germany

Christian H. Kienzle
CEO of ARGO-HYTOS GMBH, Kraichtal

Chairman of the Board of the Fluid Power
Association within VDMA

Mechanical Engineering Sales and Orders

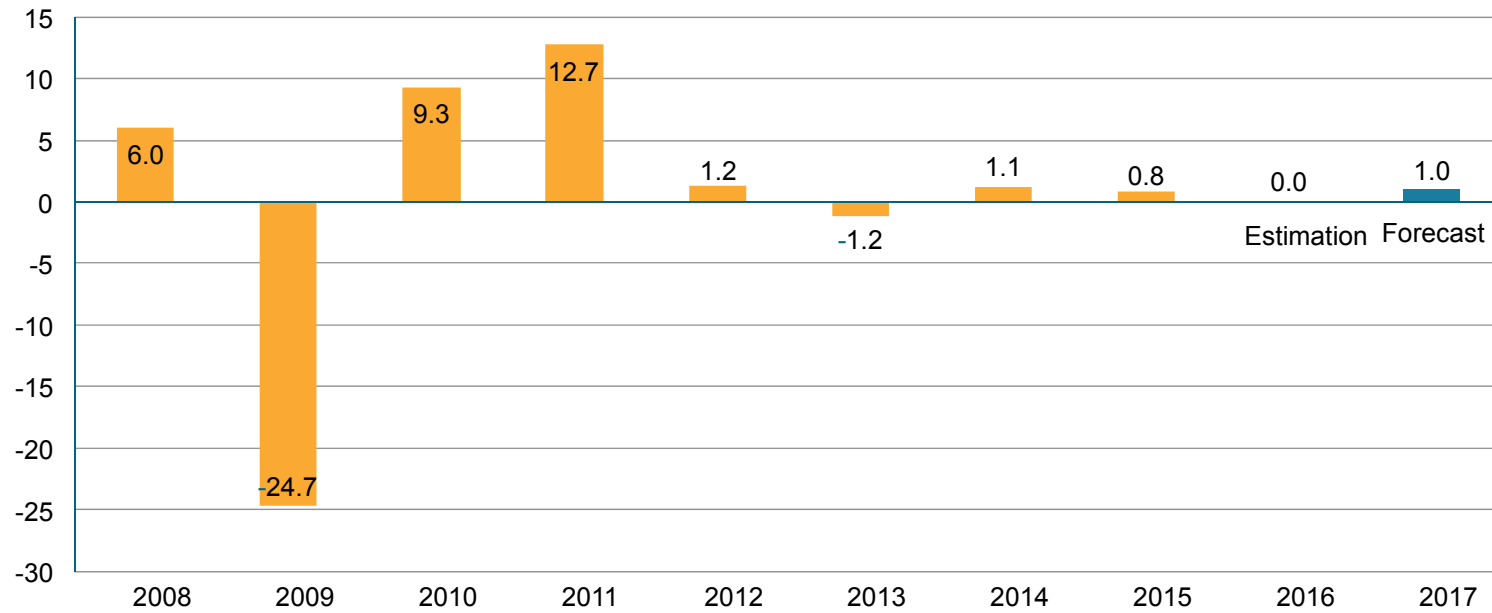


Source: VDMA

Development of German machine production

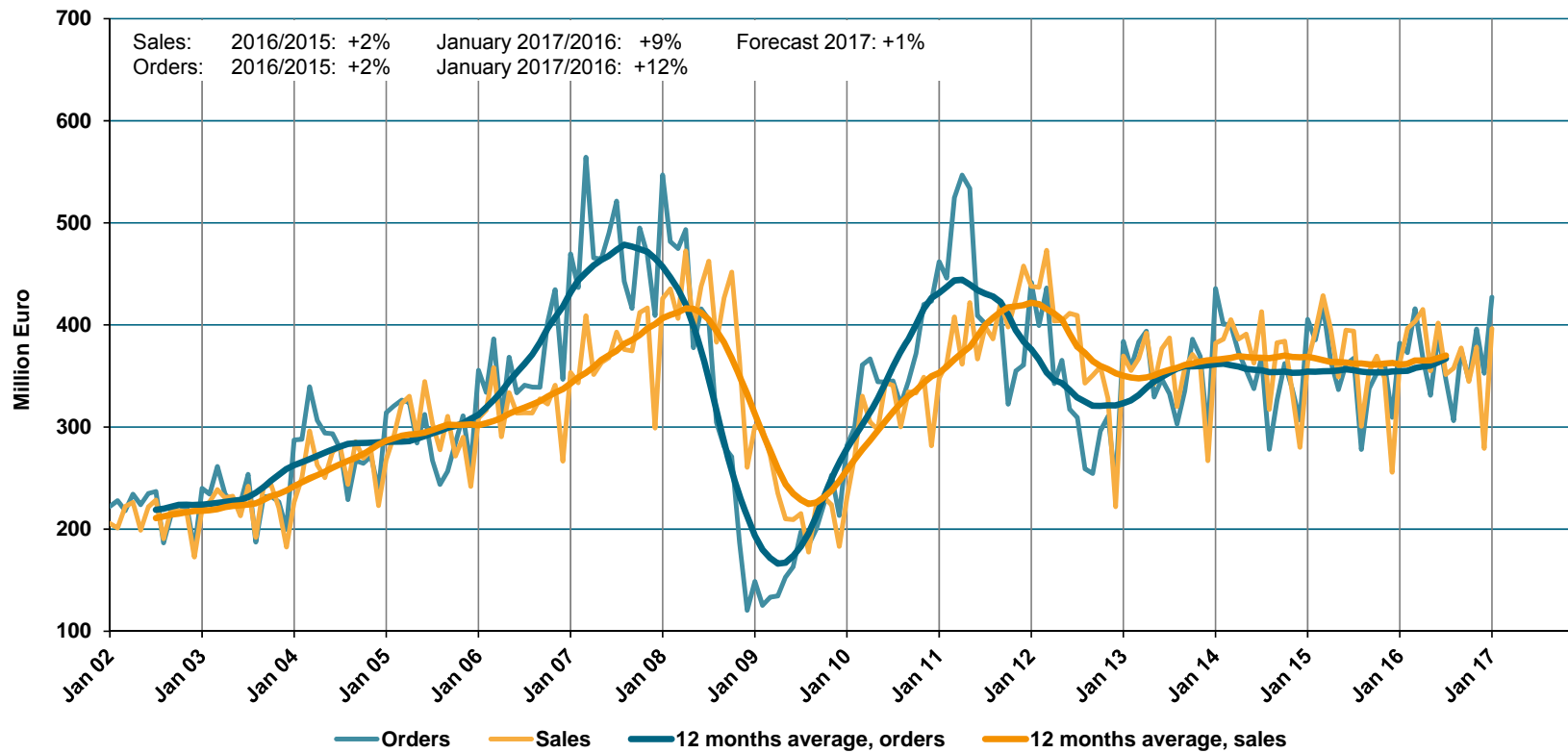


Real change against previous year in percent



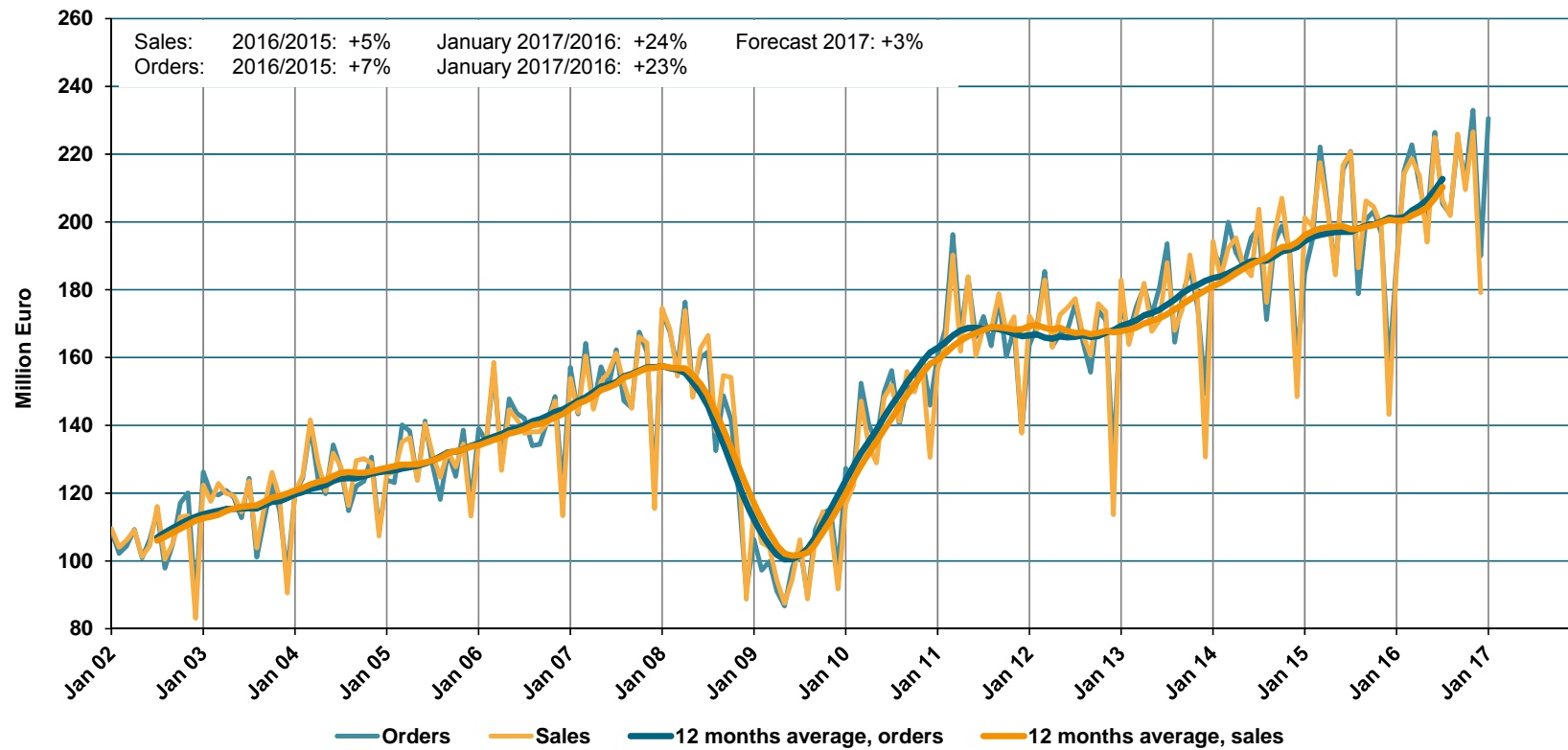
Source: Federal Statistical Office. VDMA

Hydraulics Sales and Orders



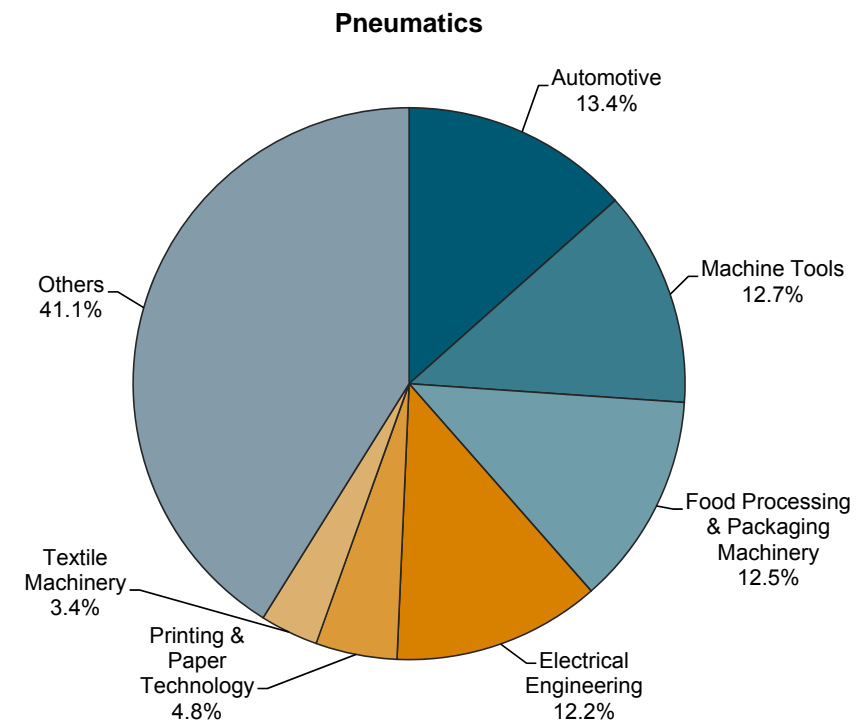
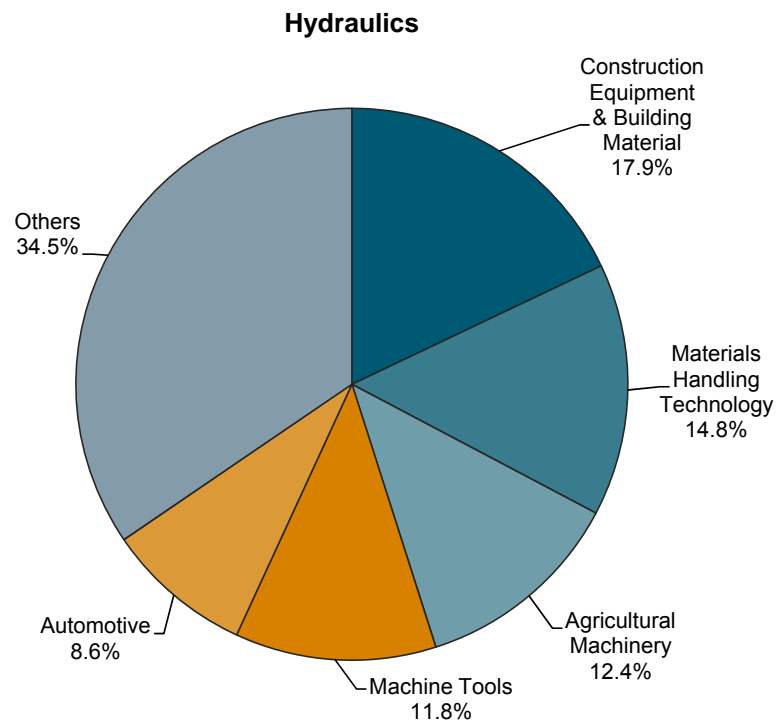
Source: VDMA

Pneumatics Sales and Orders



Source: VDMA

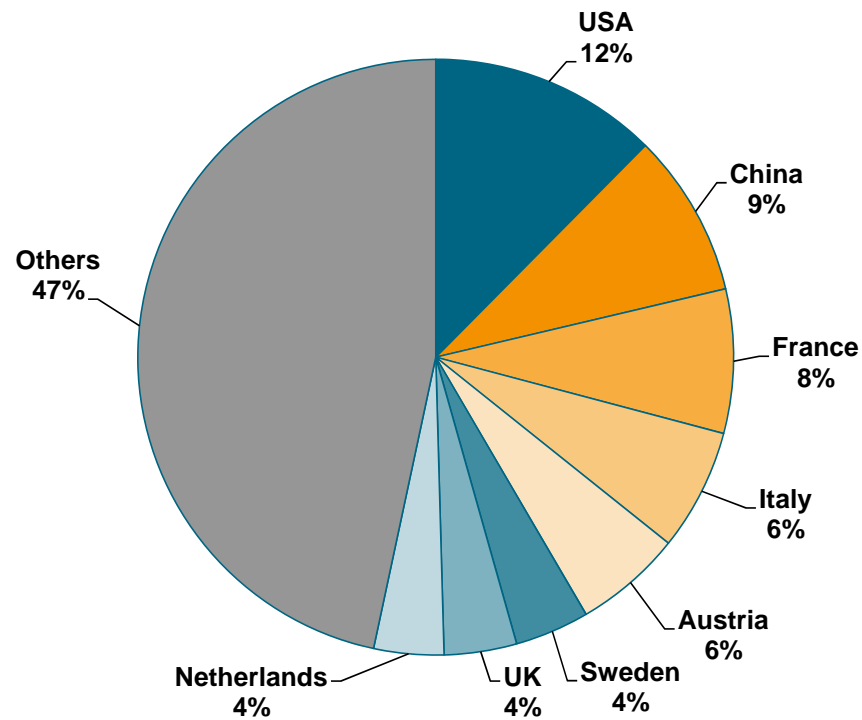
The main Customer Markets Fluid Power in % of domestic sales



Source: VDMA

German Fluid Power Exports

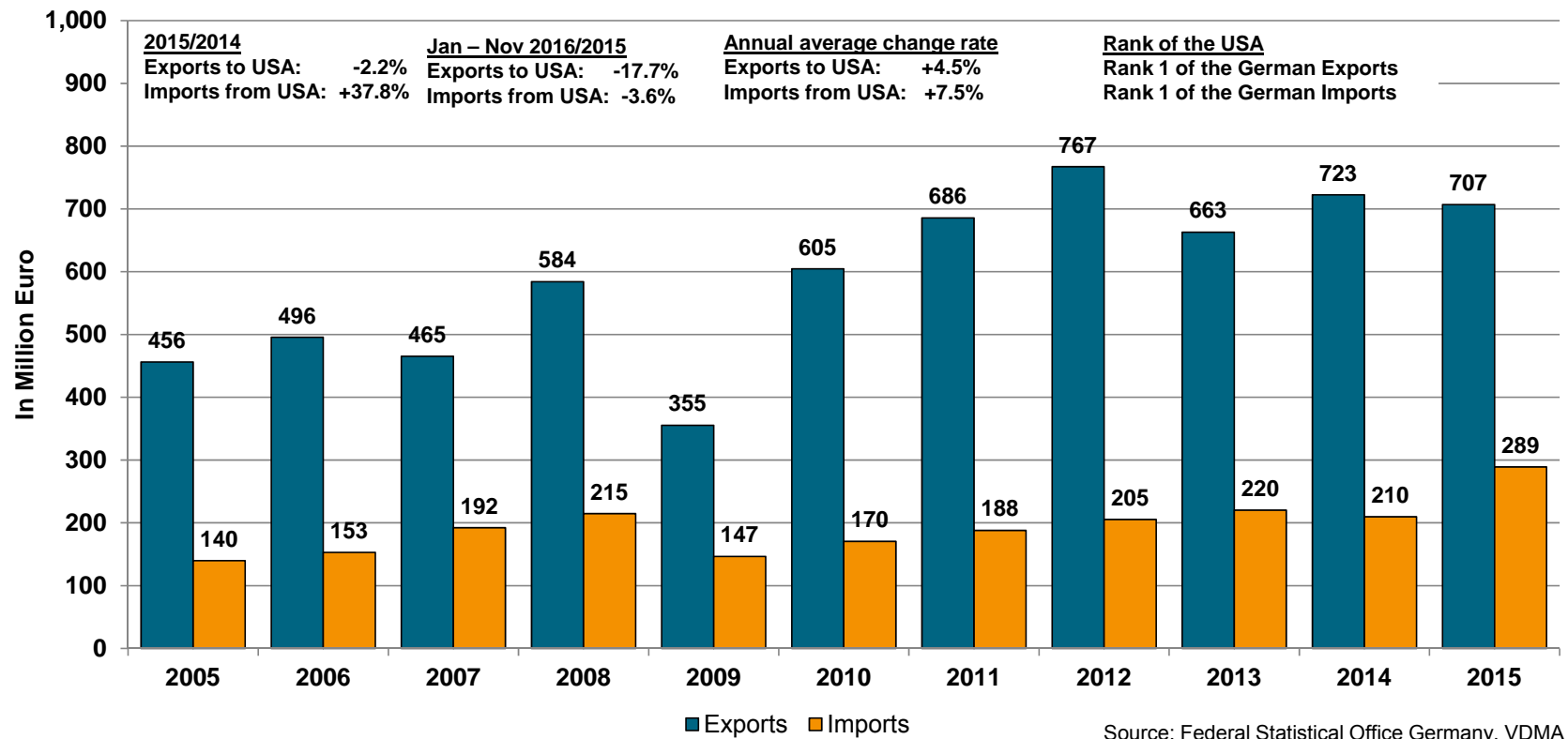
The main customer countries



Source: Federal Statistical Office Germany, VDMA

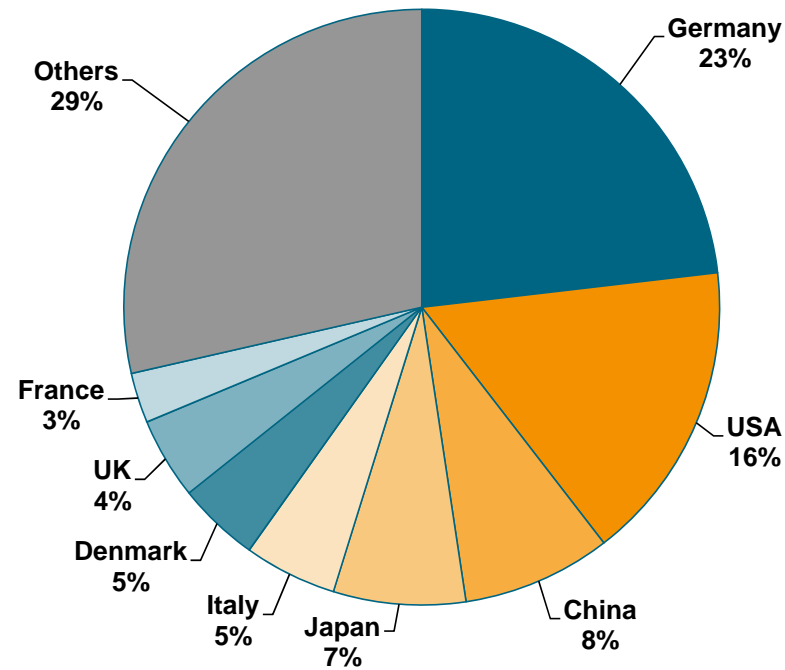
German Fluid Power

Exports to USA and Imports from USA



Global Fluid Power Exports

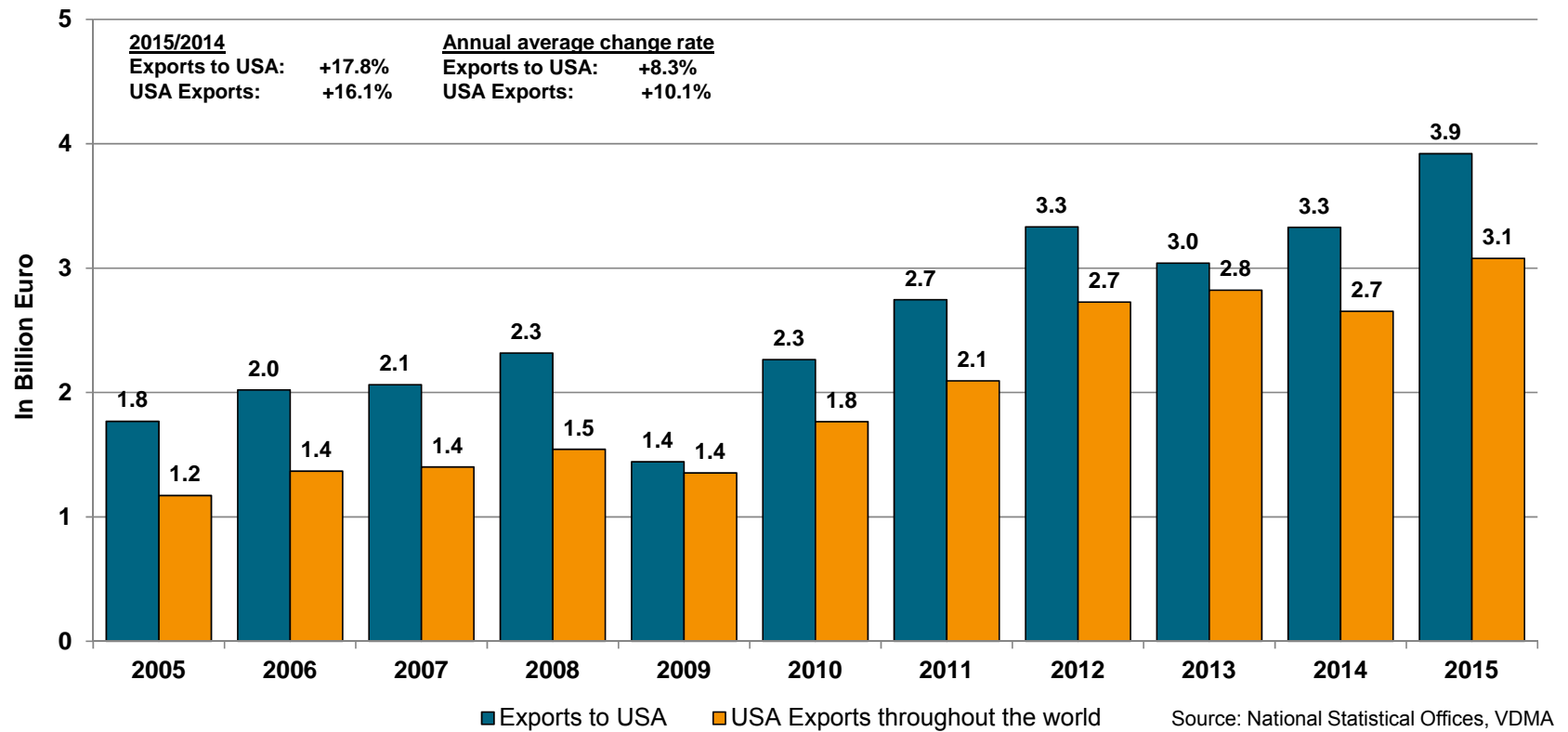
The most important supplier countries



Source: National Statistical Offices, VDMA

Fluid Power

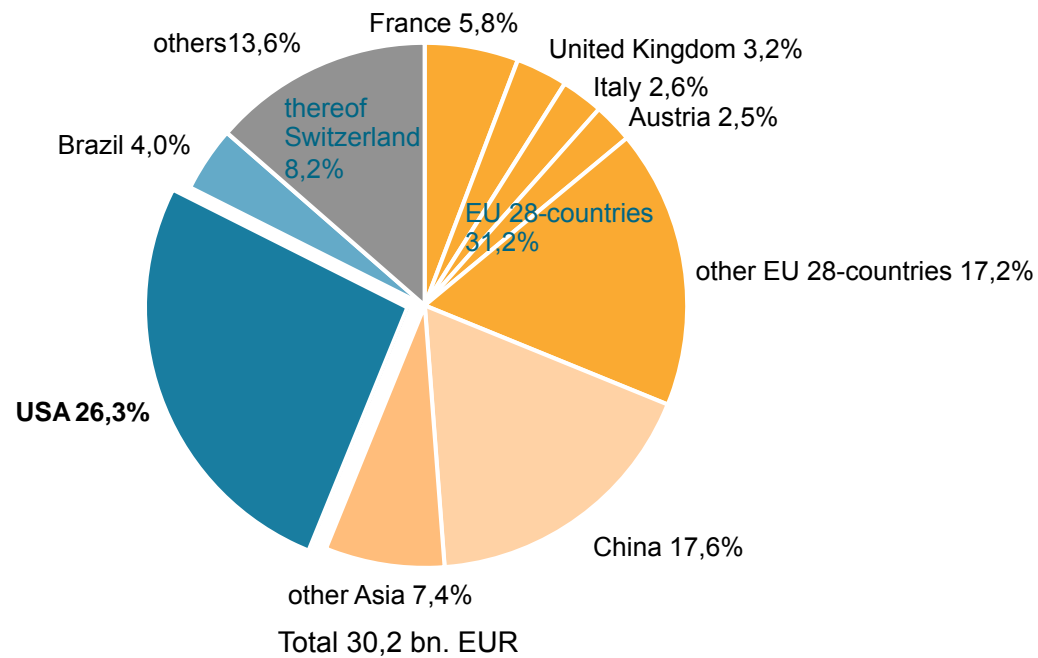
Global Exports to USA and USA Exports throughout the world



German Direct Investment in foreign Mechanical Engineering



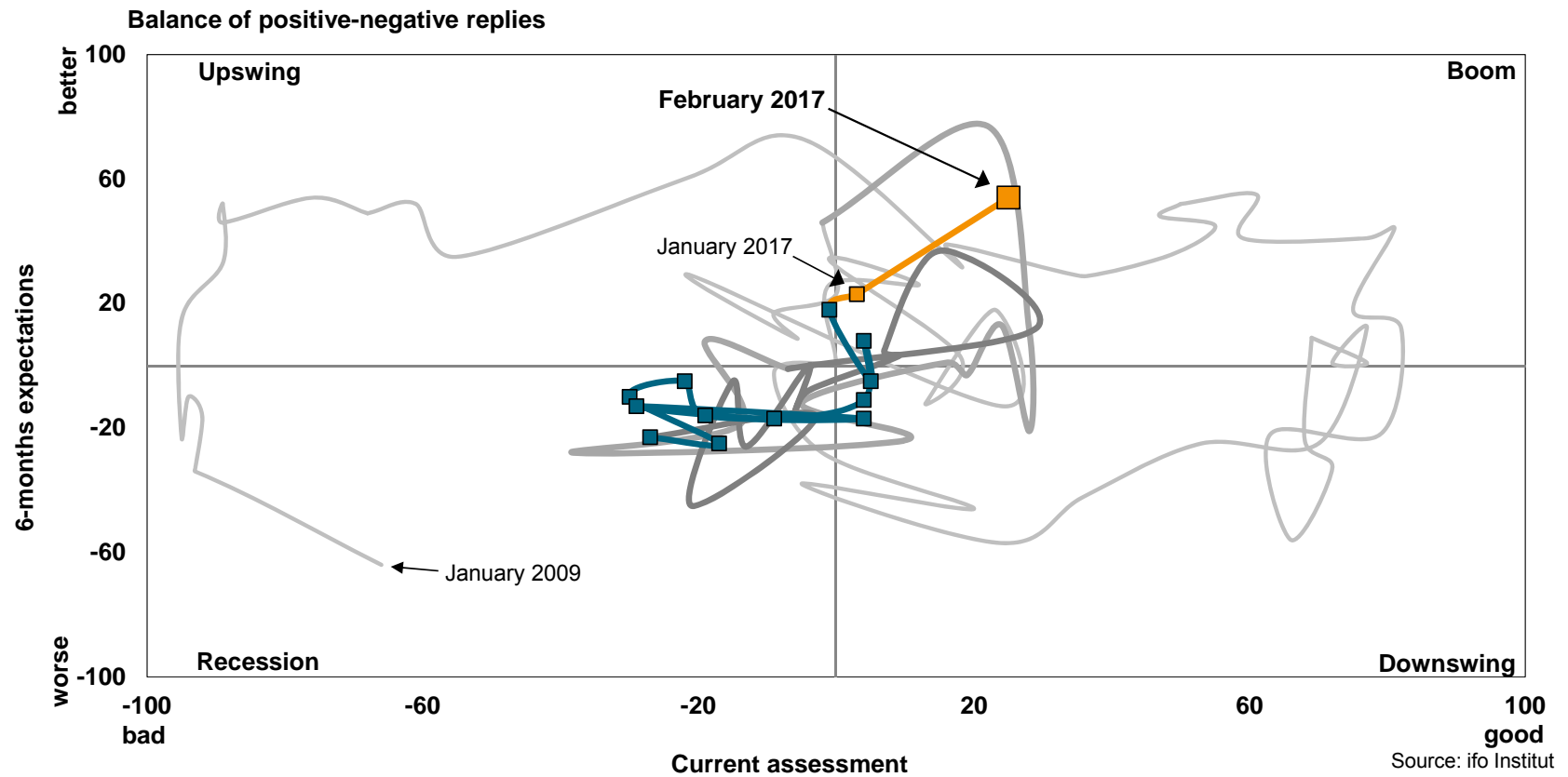
Stock by country of investment in percent, 2014



Source: German Federal Bank, VDMA

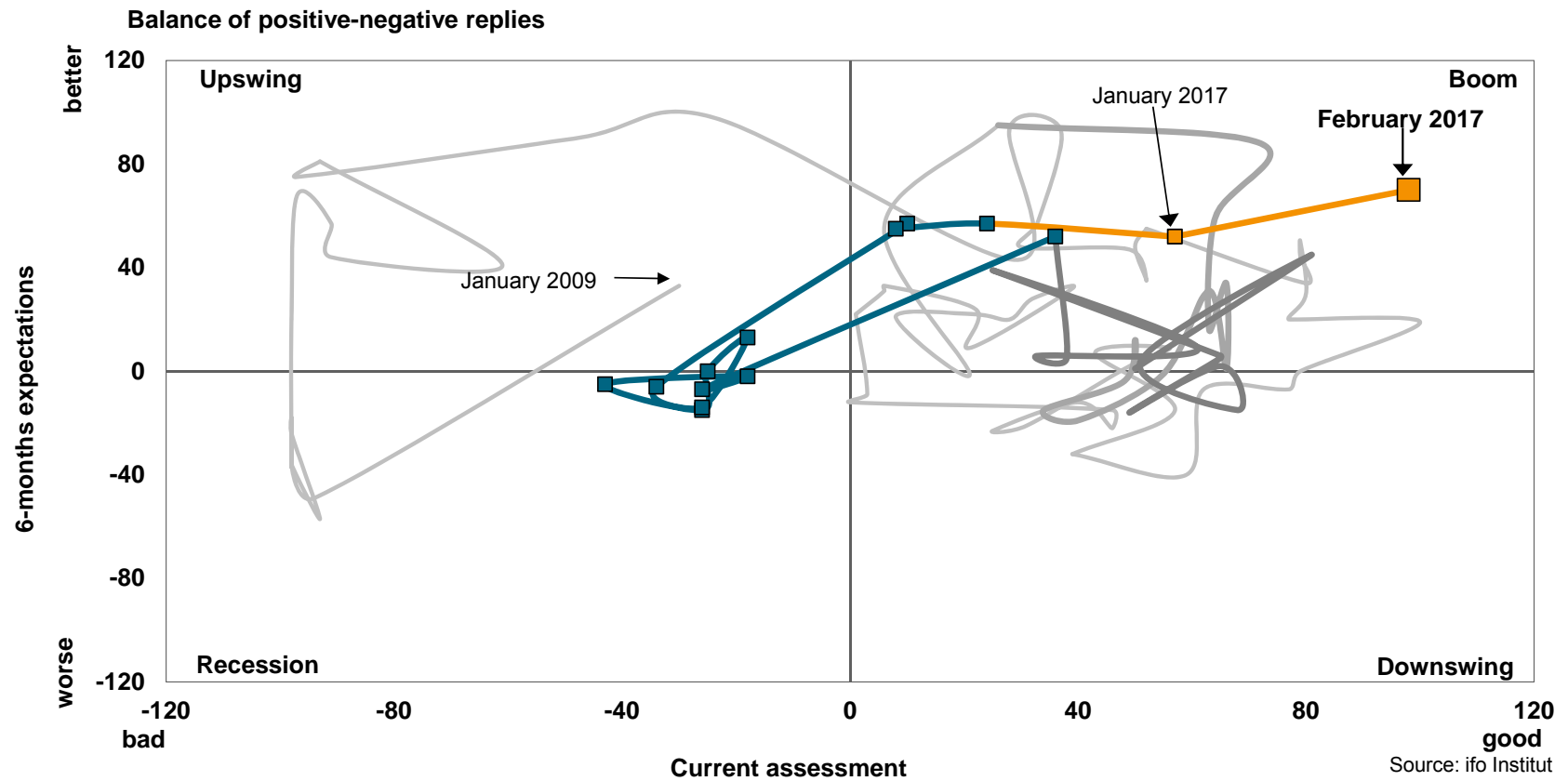
German Fluid Power

Ifo Business Cycle-Clock Hydraulics



German Fluid Power

Ifo Business Cycle-Clock Pneumatics



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 attention!