

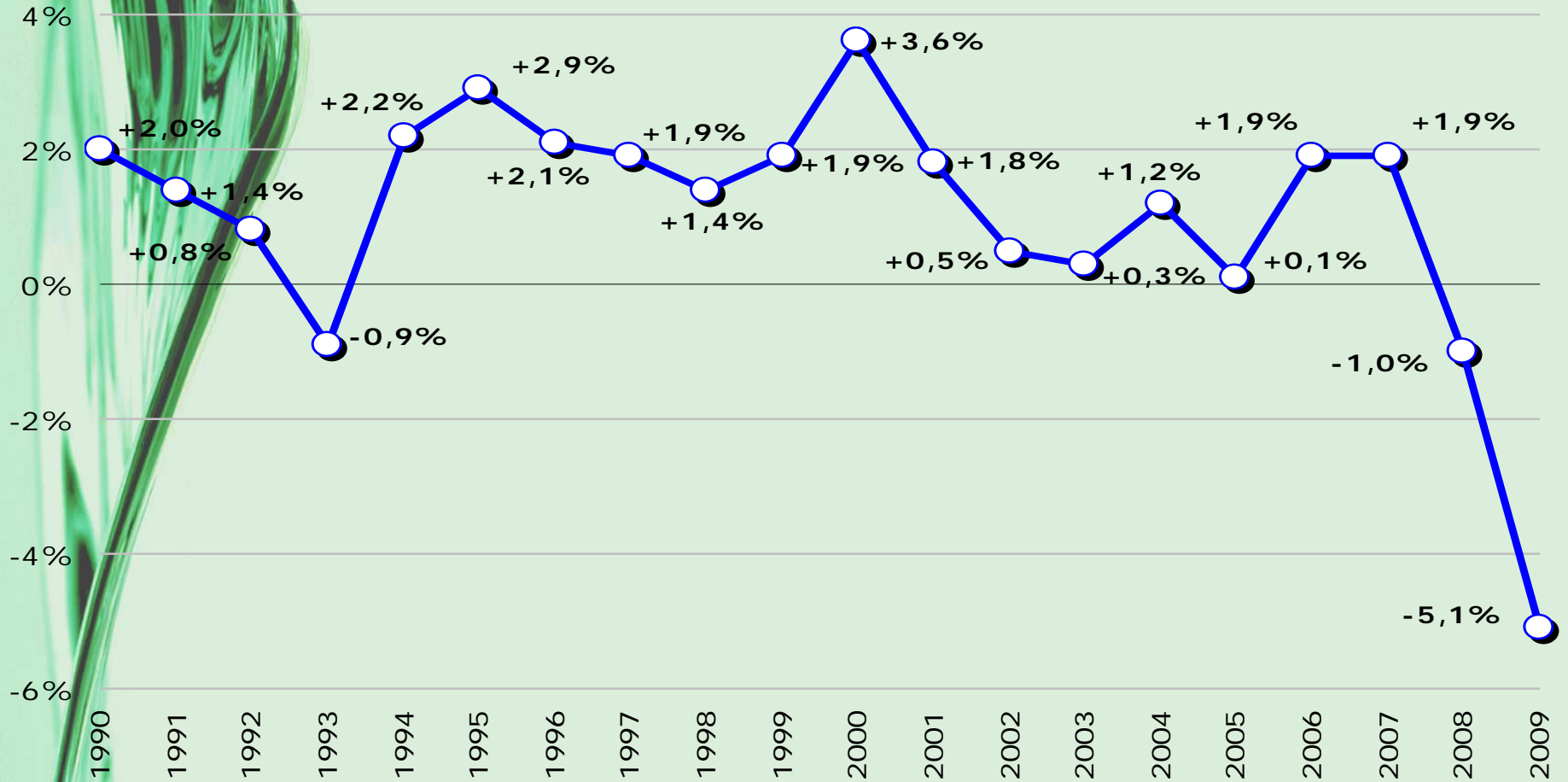
# ***International Fluid Power Summit Meeting***



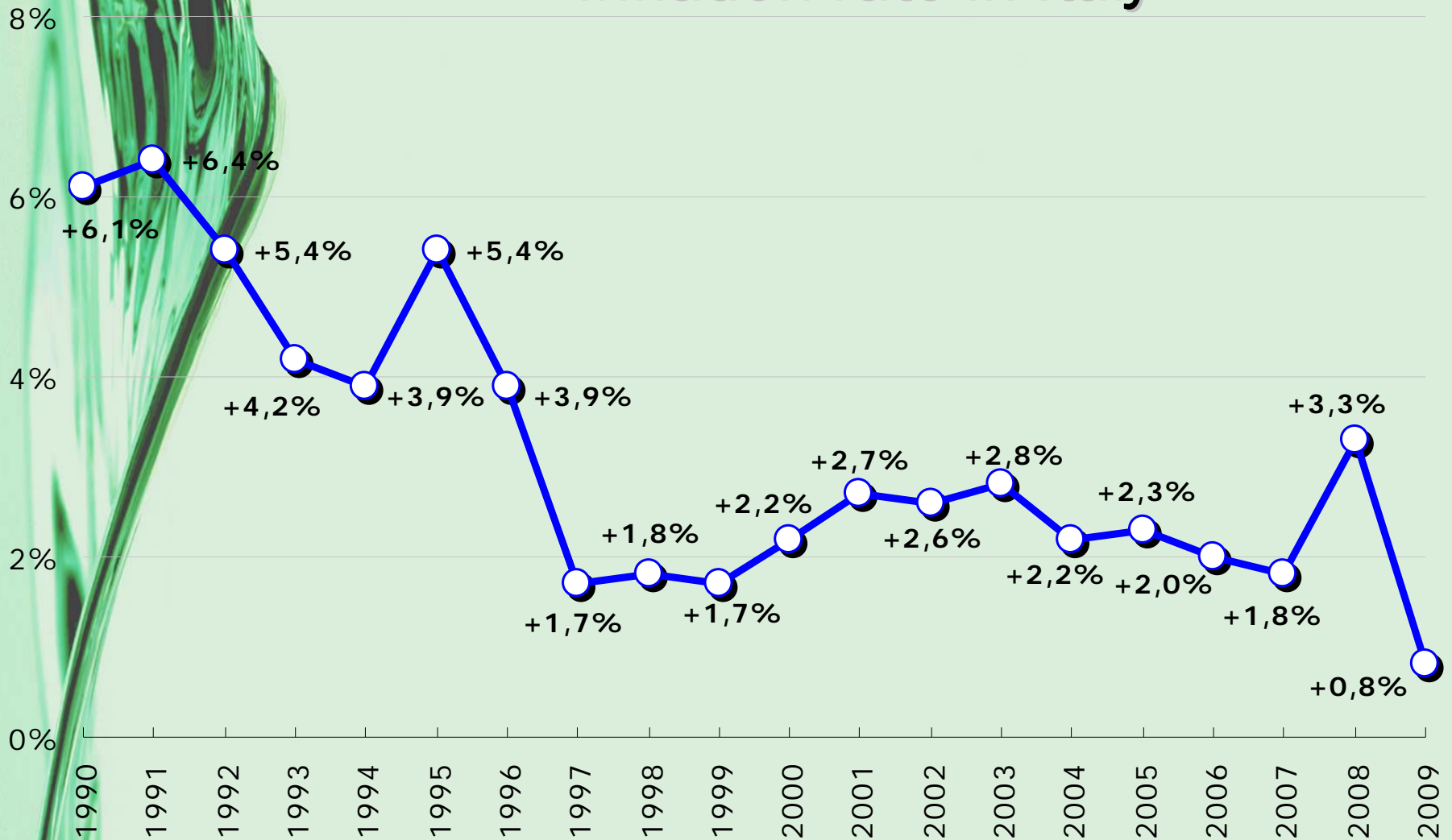
**The Fluid Power Industry in Italy**

*Milan, 6<sup>th</sup> May 2010*

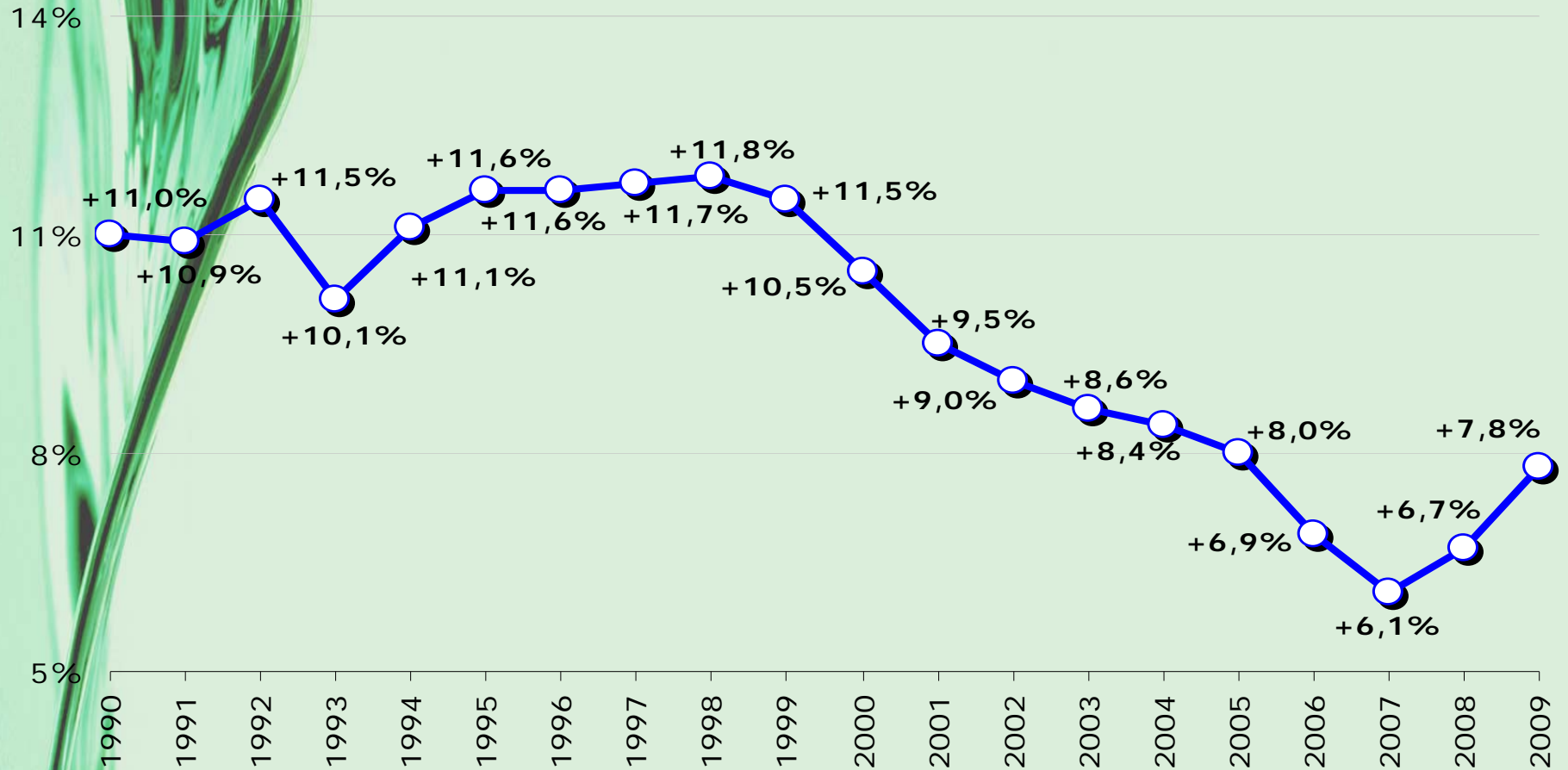
# GDP in Italy



# Inflation rate in Italy



# Unemployment rate in Italy



# The Fluid Power Market in Italy in 2009

<b>FLUID POWER</b>	<b>2009*</b>	<b>2008</b>	<b>Δ% 09/08</b>
Italy	705.800	1.329.000	-46,9%
Export	969.600	1.867.000	-48,0%
Import	469.000	902.000	-48,0%
<b>Home Market</b>	<b>1.174.800</b>	<b>2.231.000</b>	<b>-47,3%</b>
<b>National Production</b>	<b>1.675.400</b>	<b>3.196.000</b>	<b>-47,6%</b>

**Key**

Italy                      Italian production sold in Italy

Home Market            Italy + Import

National Production    Italy + Export

*\* estimate*

# Hydraulics in Italy in 2009

<b>HYDRAULICS</b>	<b>2009*</b>	<b>2008</b>	<b>Δ% 09/08</b>
Italy	524.800	1.017.000	-48,4%
Export	774.300	1.558.000	-50,3%
Import	262.500	590.000	-55,5%
<b>Home Market</b>	<b>787.300</b>	<b>1.607.000</b>	<b>-51,0%</b>
<b>National Production</b>	<b>1.299.100</b>	<b>2.575.000</b>	<b>-49,5%</b>

**Key**

Italy                      Italian production sold in Italy

Home Market            Italy + Import

National Production    Italy + Export

*\* estimate*

# Pneumatics in Italy in 2009

<b>PNEUMATICS</b>	<b>2009*</b>	<b>2008</b>	<b>Δ% 09/08</b>
Italy	181.000	312.000	-42,0%
Export	195.300	309.000	-36,8%
Import	206.500	312.000	-33,8%
<b>Home Market</b>	<b>387.500</b>	<b>624.000</b>	<b>-37,9%</b>
<b>National Production</b>	<b>376.300</b>	<b>621.000</b>	<b>-39,4%</b>

**Key**

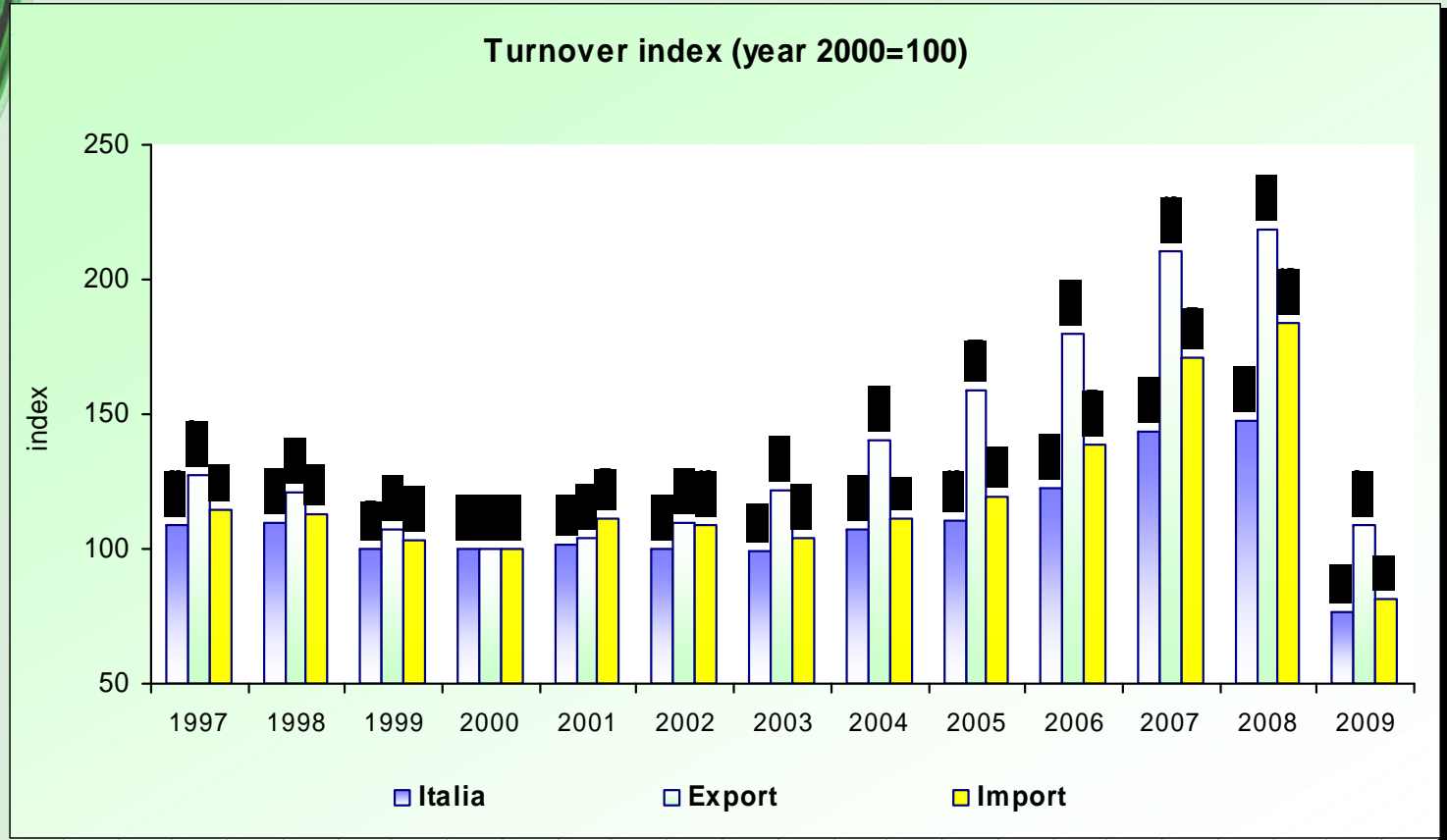
Italy                      Italian production sold in Italy

Home Market            Italy + Import

National Production    Italy + Export

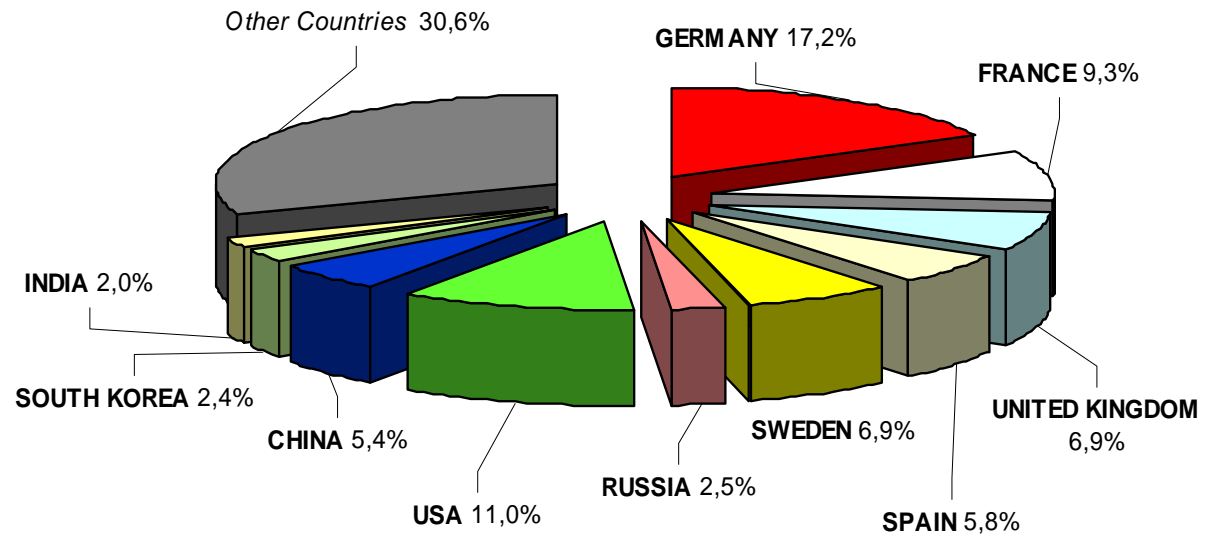
*\* estimate*

# Hydraulics- Turnover index 1997-2009



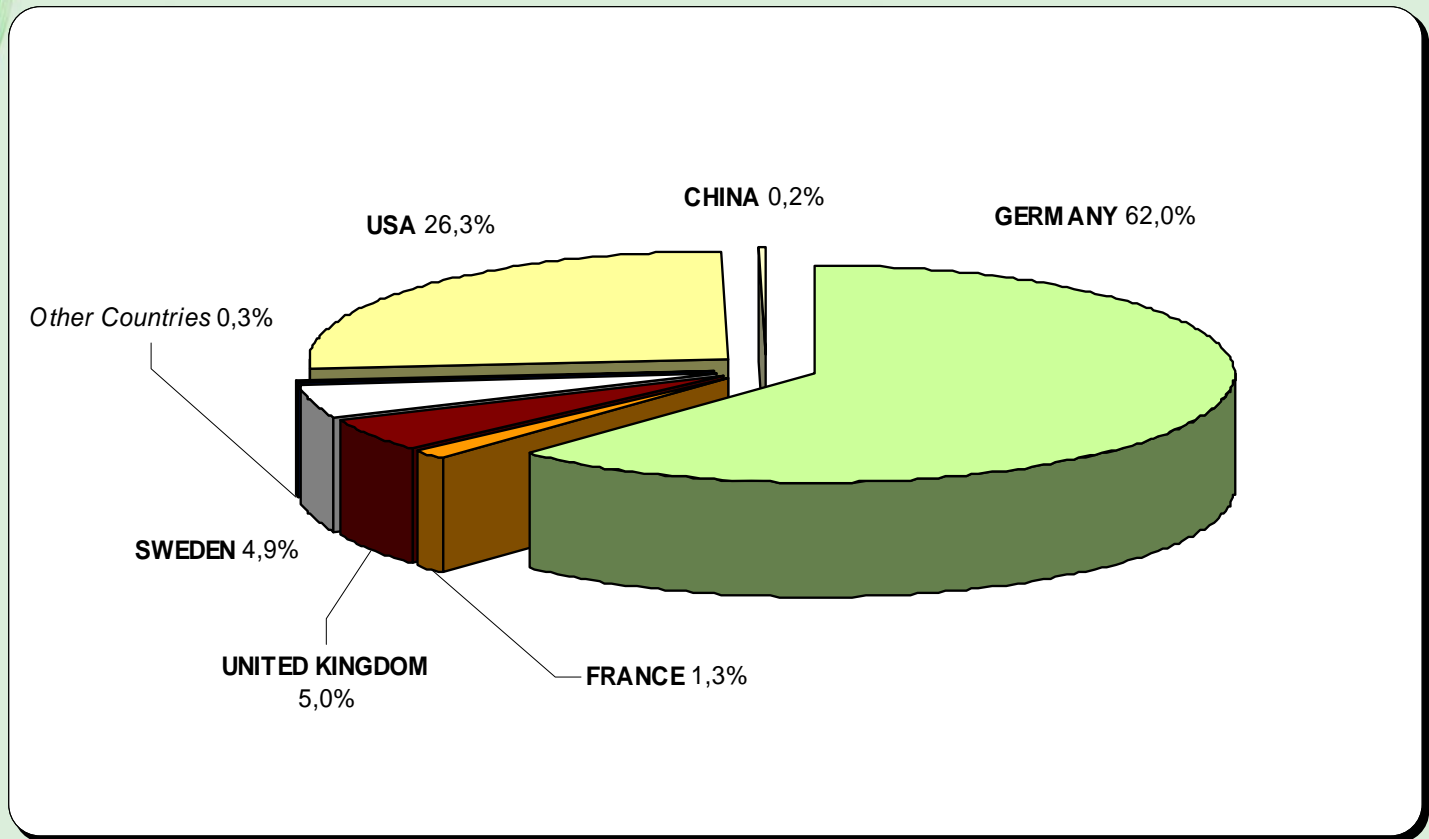
# Hydraulics

## Italian Exports towards the main countries

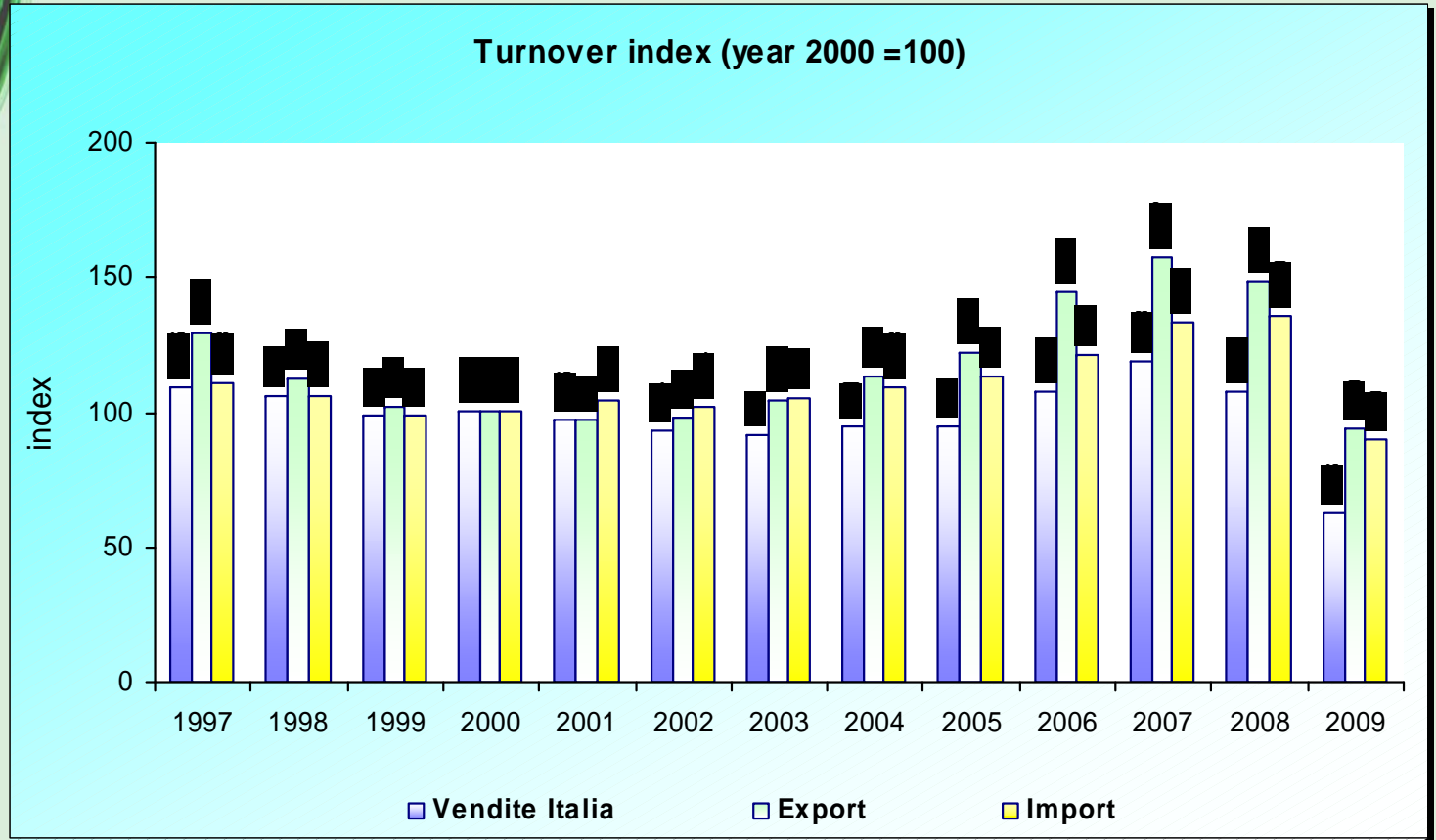


# Hydraulics

## Italian Imports from major supplier countries

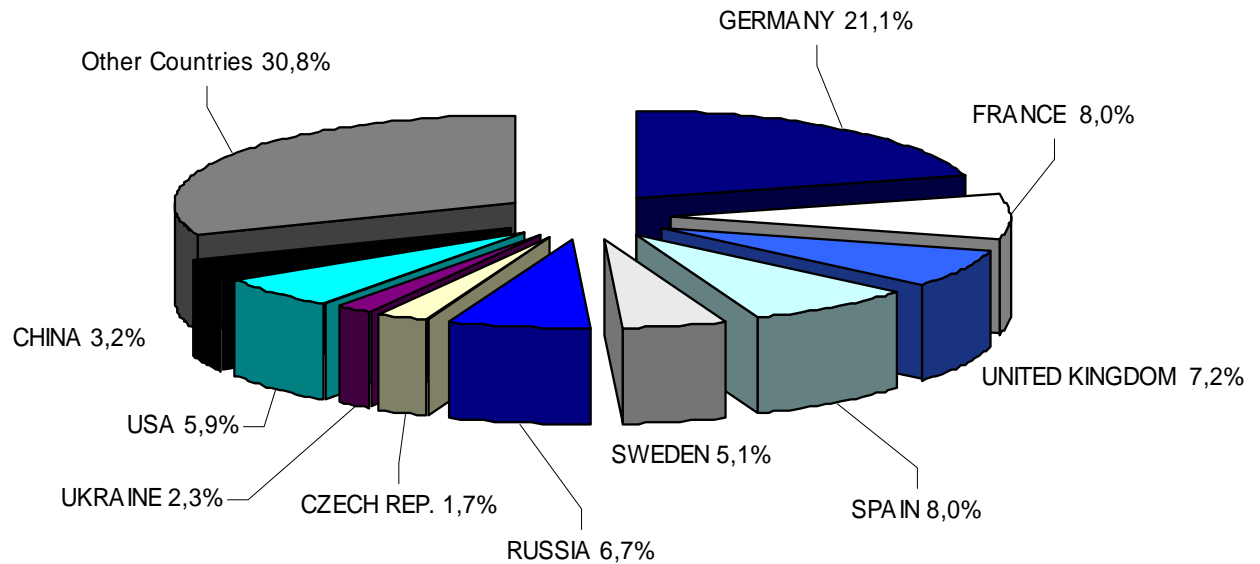


# Pneumatics– Turnover index 1997-2009



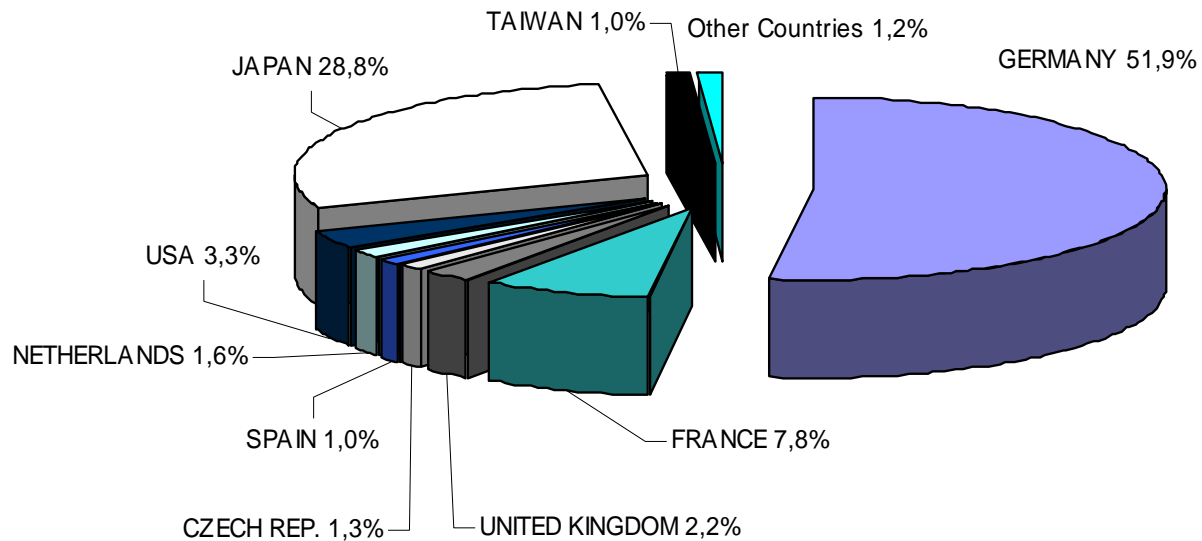
# Pneumatics

## Italian Exports towards the main countries



# Pneumatics

## Italian Imports from major supplier countries



# Hydraulics

## Quarterly Trend Survey: 1<sup>st</sup> Quarter 2010

	Turnover	Orders
ITALY	-1,4%	65,0%
EXPORT	27,9%	152,9%
IMPORT	-25,0%	49,4%
<b>HOME MARKET</b>	<b>-9,3%</b>	<b>59,8%</b>
<b>NATIONAL PRODUCTION</b>	<b>16,1%</b>	<b>117,5%</b>

### Key

Italy	Italian production sold in Italy
Home Market	Italy + Import
National Production	Italy + Export

# Pneumatics

## Quarterly Trend Survey: 1<sup>st</sup> Quarter 2010

	Turnover	Orders
ITALY	38,5%	58,0%
EXPORT	49,3%	78,1%
IMPORT	13,8%	29,4%
<b>HOME MARKET</b>	<b>25,3%</b>	<b>42,8%</b>
<b>NATIONAL PRODUCTION</b>	<b>44,1%</b>	<b>68,5%</b>

### Key

Italy	Italian production sold in Italy
Home Market	Italy + Import
National Production	Italy + Export