

NFPA Customer Market Survey 2012 Data

The segmentation of U.S. fluid power sales
by customer market



Chart 4 – Total Sales for Hydraulics

Recognizing that many manufacturers do not receive point of sale data which would help determine their own markets through distribution channels, we asked members to provide their best estimate. This data is included with direct sales data in the table and chart below, and is not likely to be as reliable as data for direct sales.

Hydraulic Sales	Dollars	
Total	5,645,907,431	
Hydraulic Sales (Total)	Dollars	Percent of Total Hydraulic
Total	5,645,907,431	100.0%
Hydraulic Sales (Total)	Dollars	Percent of Total Hydraulic
Agricultural Machinery	949,207,345	16.8%
Automotive (including light trucks)	88,603,505	1.6%
Class 4-8 Trucks (including vocational trucks)	342,862,012	6.1%
Construction Machinery	1,328,586,244	23.5%
Lawn & Garden	122,987,367	2.2%
Material Handling (including conveying)	354,444,591	6.3%
Metalworking and Machine Tools	119,061,530	2.1%
Mining Machinery	228,920,108	4.1%
Oil & Gas Machinery	268,278,392	4.8%
Paper Machinery	37,503,415	0.7%
Plastics Machinery	58,817,532	1.0%
Power Generation	102,916,809	1.8%
Other	1,643,718,581	29.1%

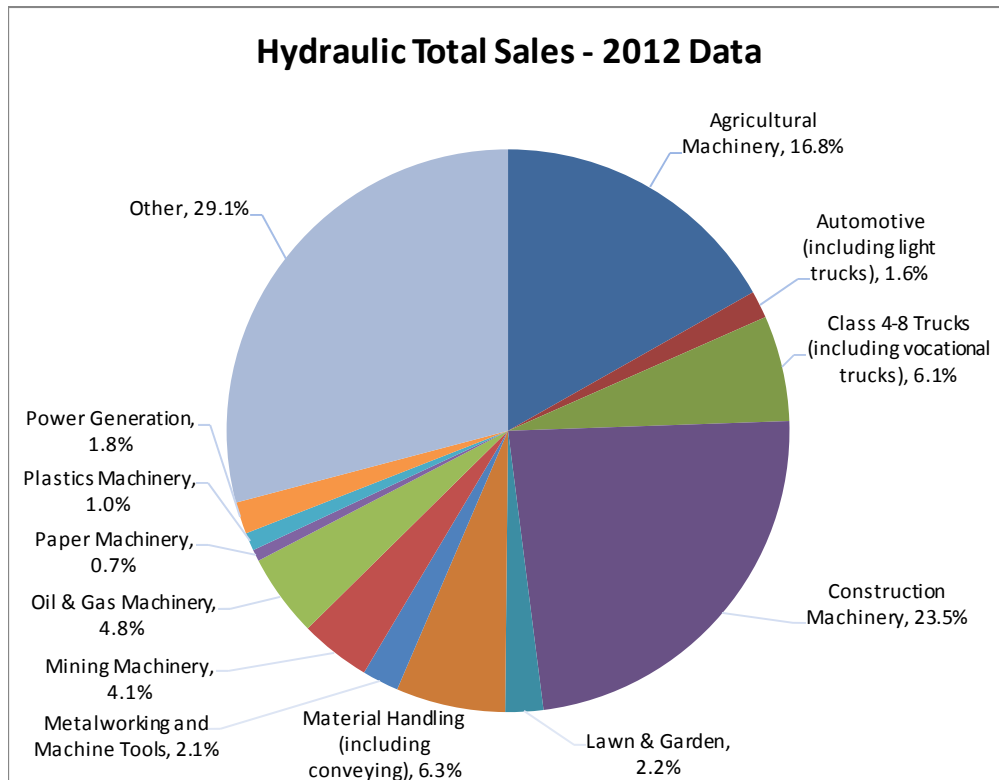


Chart 7 – Total Sales for Pneumatics

Recognizing that many manufacturers do not receive point of sale data which would help determine their own markets through distribution channels, we asked members to provide their best estimate. This data is included with direct sales data in the table and chart below, and is not likely to be as reliable as data for direct sales.

Pneumatic Sales	Dollars	
Total	452,161,050	
Pneumatic Sales (Total)	Dollars	Percent of Total Pneumatic
Total	452,161,050	100.0%
Pneumatic Sales (Total)	Dollars	Percent of Total Pneumatic
Automotive (including light trucks)	31,443,300	7.0%
Chemical Processing	6,143,534	1.4%
Class 4-8 Trucks (including vocational trucks)	50,479,999	11.2%
Food Processing	28,384,106	6.3%
Material Handling (including conveying)	19,679,245	4.4%
Medical Equipment	37,529,460	8.3%
Metalworking and Machine Tools	13,924,320	3.1%
Oil & Gas Machinery	29,015,987	6.4%
Packaging Machinery	30,389,597	6.7%
Plastics Machinery	10,314,098	2.3%
Paper Machinery	20,192,059	4.5%
Printing Machinery	16,376,719	3.6%
Semiconductor	11,606,091	2.6%
Other	146,682,535	32.4%

