

NFPA Customer Market Survey

2023 Data

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





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Thank you for participating in the annual NFPA Customer Market Survey. The purpose of this survey is to provide members with more complete information about the segmentation of U.S. fluid power sales to major customer markets. The results contained in this report are based on survey responses from **60** manufacturer members of NFPA. All participating manufacturers were asked to submit their total U.S. sales for all hydraulic and pneumatic components and/or systems in 2022 by customer market, which yielded a total of **55** hydraulic and **15** pneumatic responses.

NFPA does recognize that many manufacturers sell their product through the distribution channel, but do not receive point of sale data from their distributors. While this data is helpful in accurately determining their own customer market segmentation through their distribution channels, we asked manufacturers to provide their best estimate.

Chart 1 – Total U.S. Sales for Hydraulics in 2023

Hydraulic Sales (Total)	Dollars	Percent of Total Hydraulic
Total	9,306,727,284	100.0%
Market	Dollars	Percent of Total Hydraulic
Construction Machinery	1,986,581,398	21.3%
Farm Machinery and Equipment	1,547,210,017	16.6%
Material Handling Equipment	821,681,464	8.8%
Class 4-8 Trucks (including vocational trucks)	389,126,941	4.2%
Automobile, Light Truck, and Utility Vehicle	264,586,301	2.8%
Oil and Gas Machinery	257,429,686	2.8%
Mining Machinery and Equipment	224,201,029	2.4%
Lawn and Garden Equipment	123,483,677	1.3%
Power Generation	121,820,939	1.3%
Aerospace Product and Parts	96,502,119	1.0%
Metalworking and Machine Tools	67,204,172	0.7%
Sawmill, Woodworking, and Paper Machinery	39,360,584	0.4%
Plastics and Rubber Machinery	32,156,912	0.3%
Other	3,335,382,047	35.8%

2023 Hydraulic Sales Breakdown by Market

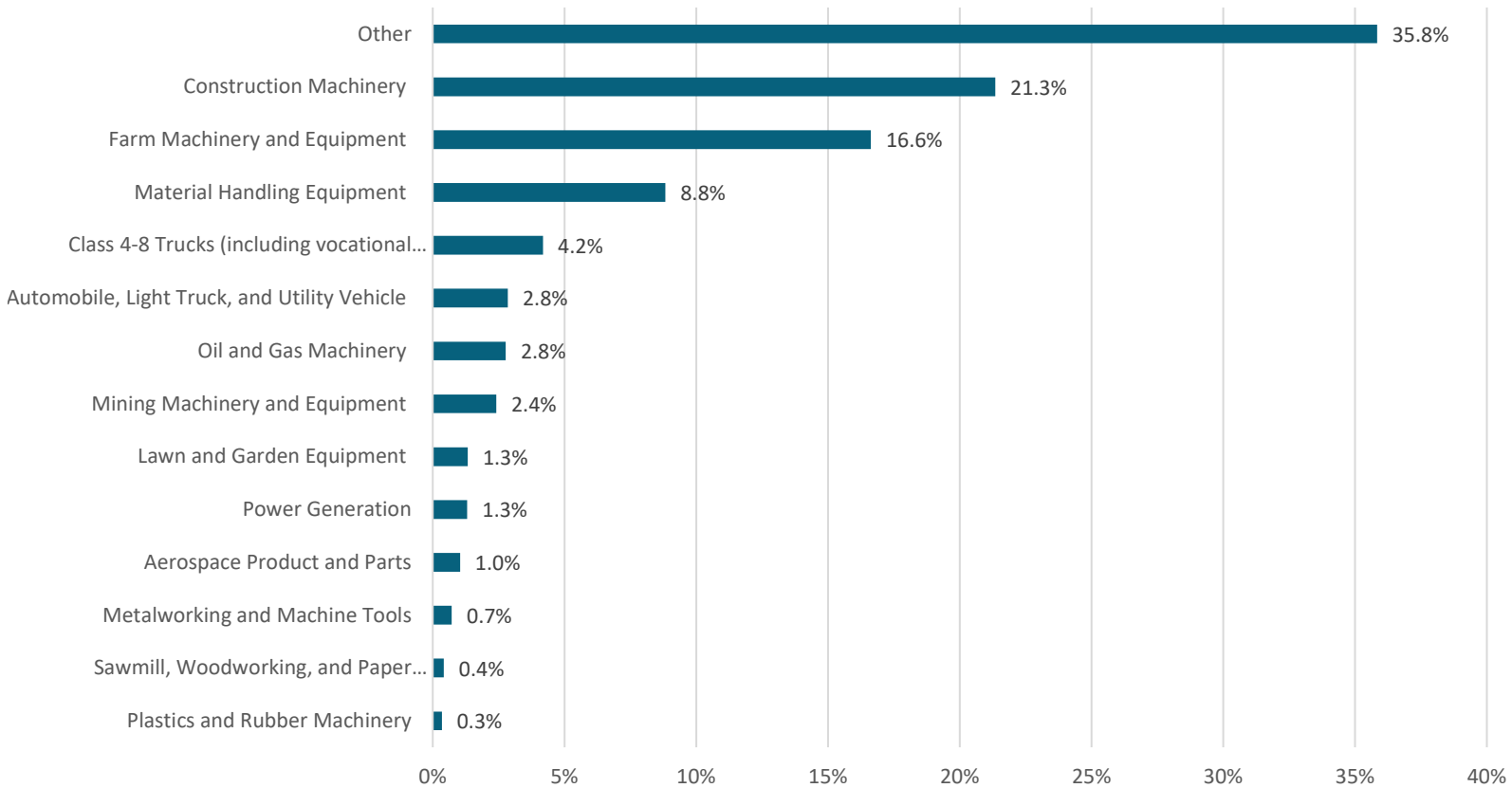


Chart 2 – Total U.S. Sales for Pneumatics in 2023

Pneumatic Sales (Total)	Dollars	Percent of Total Pneumatic
Total	941,294,303	100.0%
Market	Dollars	Percent of Total Pneumatic
Automobile, Light Truck, and Utility Vehicle	138,873,230	14.8%
Packaging Machinery	62,842,555	6.7%
Class 4-8 Trucks (including vocational trucks)	38,116,583	4.0%
Semiconductor Machinery	38,066,583	4.0%
Medical Equipment	36,821,890	3.9%
Food Product Machinery	29,064,743	3.1%
Metalworking and Machine Tools	28,195,714	3.0%
Material Handling (including conveying)	19,450,540	2.1%
Sawmill, Woodworking, and Paper Machinery	11,873,529	1.3%
Plastics and Rubber Machinery	11,593,838	1.2%
Oil and Gas Machinery	10,704,453	1.1%
Printing Machinery	3,246,108	0.3%
Aerospace Product and Parts	3,109,463	0.3%
Basic Chemical Manufacturing	495,014	0.1%
Other	508,840,059	54.1%

2023 Pneumatic Sales Breakdown by Market

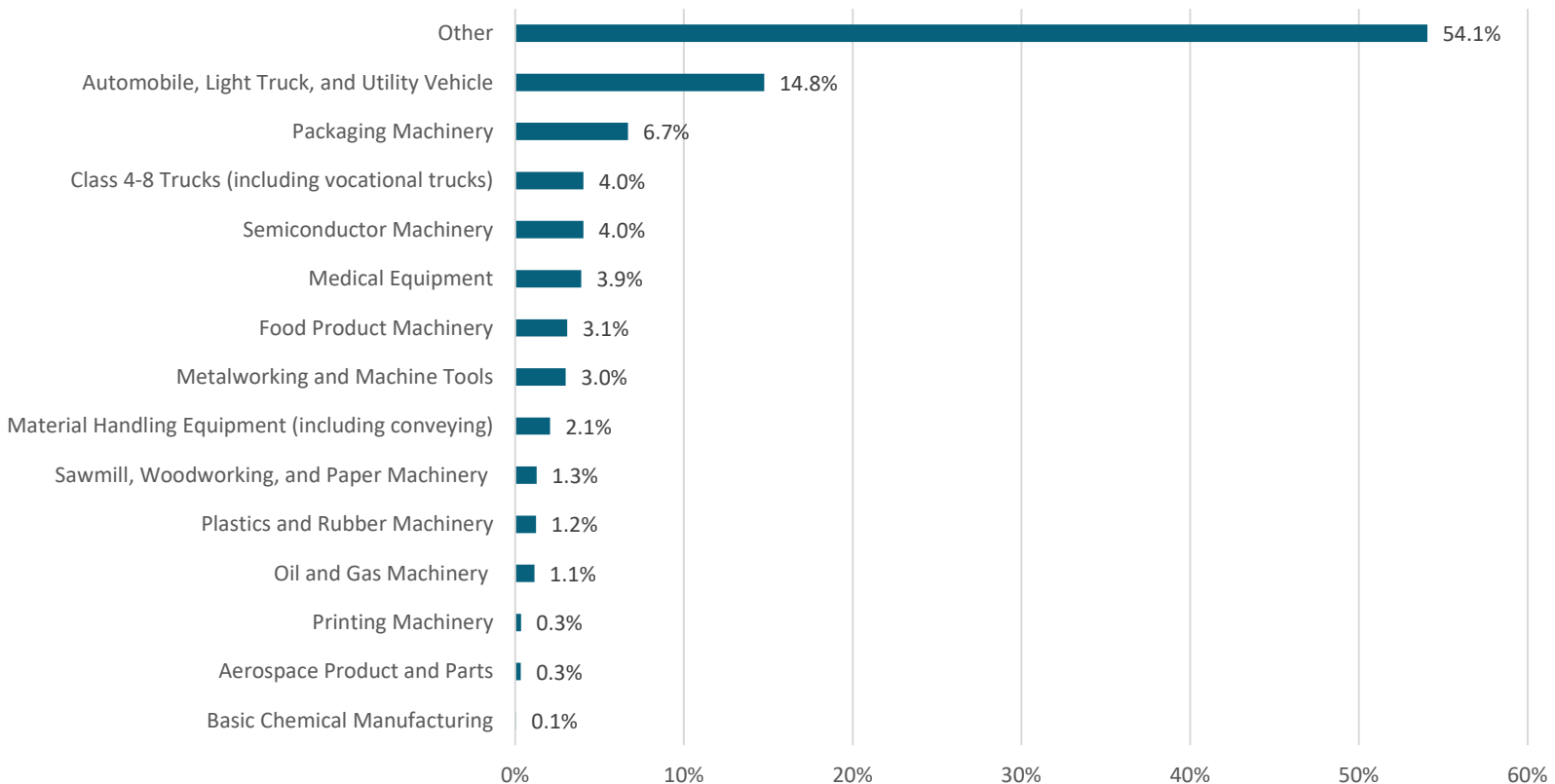
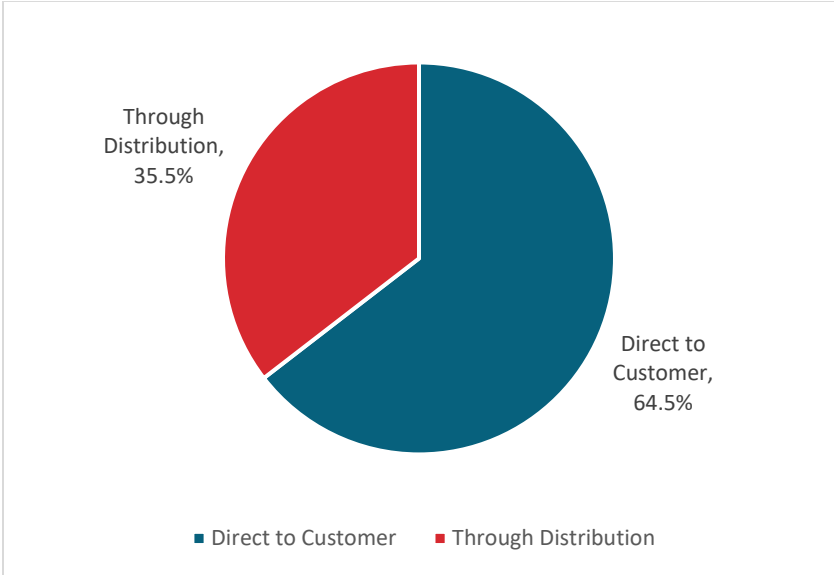
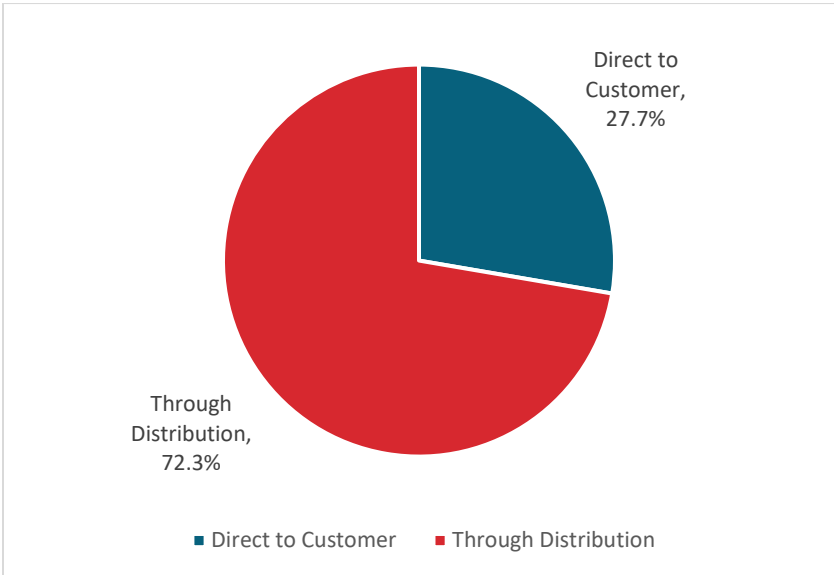


Chart 3 – What percentage of your sales go direct to customer vs. through distribution?

Hydraulics Sales



Pneumatics Sales





Customer Market Survey – 2023 Data Participation List

AAA PRODUCTS INTERNATIONAL
ACE CONTROLS, INC.
AGGRESSIVE HYDRAULICS
ALADCO, LLC
ARGO-HYTOS INC.
ASA HYDRAULIK OF AMERICA, INC.
BAILEY INTERNATIONAL
BOSCH REXROTH CORPORATION
BRENNAN INDUSTRIES, INC.
BUCHER HYDRAULICS
CASAPPA CORP.
CIM-TEK FILTRATION
CONCENTRIC ROCKFORD INC.
DANFOSS POWER SOLUTIONS
DELTA POWER COMPANY
DELTROL FLUID PRODUCTS
DES-CASE
DOERING COMPANY
FORCE AMERICA INC./VALVE DIVISION
HAWE HYDRAULIK GMBH & CO KG
HECO GEAR, INC.
HOLMBURY, INC.
HUNGER HYDRAULICS, C.C. LTD.
HUSCO
HYCO ALABAMA, LLC A SUBSIDIARY OF MONTANHYDRAULIK
HYDAC/SCHROEDER INDUSTRIES
HYDRAFORCE
HYDRO LEDUC NA INC.
IMI
ITT CORPORATION

JARP INDUSTRIES, INC.
KAWASAKI PRECISION MACHINERY (U.S.A) INC.
KYB AMERICAS CORPORATION
LEXAIR, INC.
LINDE HYDRAULICS CORP.
MARZOCCHI PUMPS USA
MASTER PNEUMATIC-DETROIT, INC.
MHA ZENTGRAF CORPORATION
MILWAUKEE CYLINDER
MOOG INC.
MP FILTRI USA INC.
PARKER HANNIFIN CORP.
PENINSULAR CYLINDER COMPANY
PERMCO, INC.
PRINCE MANUFACTURING CORPORATION
PROPORTION AIR, INC.
PTI TECHNOLOGIES, INC.
R & J CYLINDER & MACHINE, INC.
ROSENBOOM MACHINE & TOOL
ROSS CONTROLS
SPX HYDRAULIC TECHNOLOGIES
TEXAS HYDRAULICS
TRELLEBORG SEALING SOLUTIONS
TUSON CORPORATION
VIS HYDRAULICS NORTH AMERICA
WALVOIL FLUID POWER
WANDFLUH OF AMERICA, INC.
WORLD WIDE FITTINGS CORPORATION
ZINGA FILTRATION GROUP
ZSI FOSTER

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