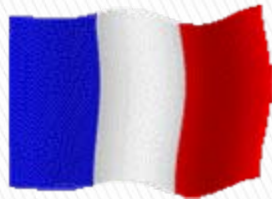


# GENERAL MEETING

France - June 2010 - MUNICH



## ECONOMIC SITUATION

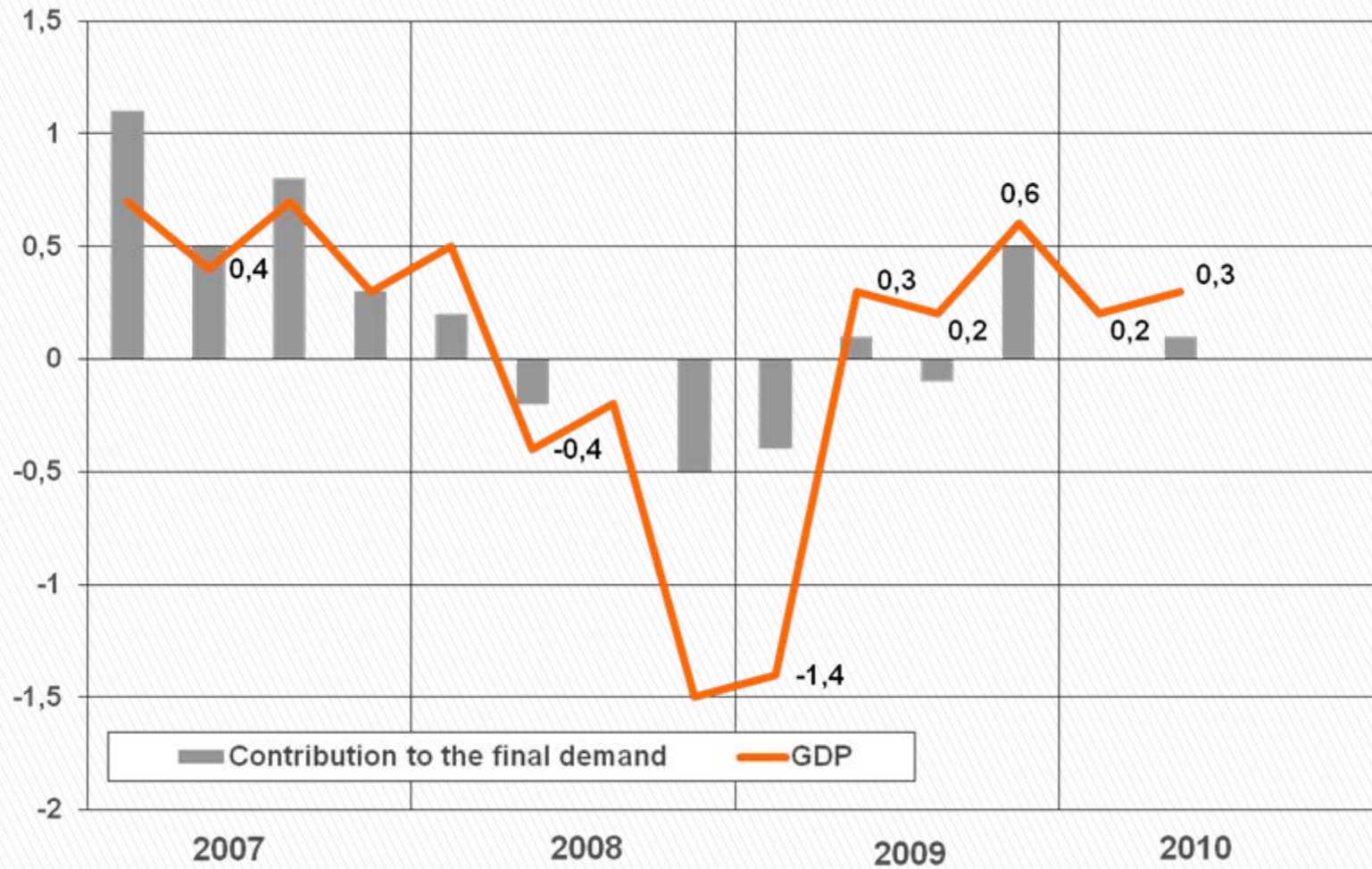
## ARTEMA - FRANCE

- **Actual general economic situation**
- **Economic Situation of in 2009 :**
  - ❖ **Mechanical Engineering Sector**
  - ❖ **Power Transmission Industry Sector**
- **Forecasts for 2010**

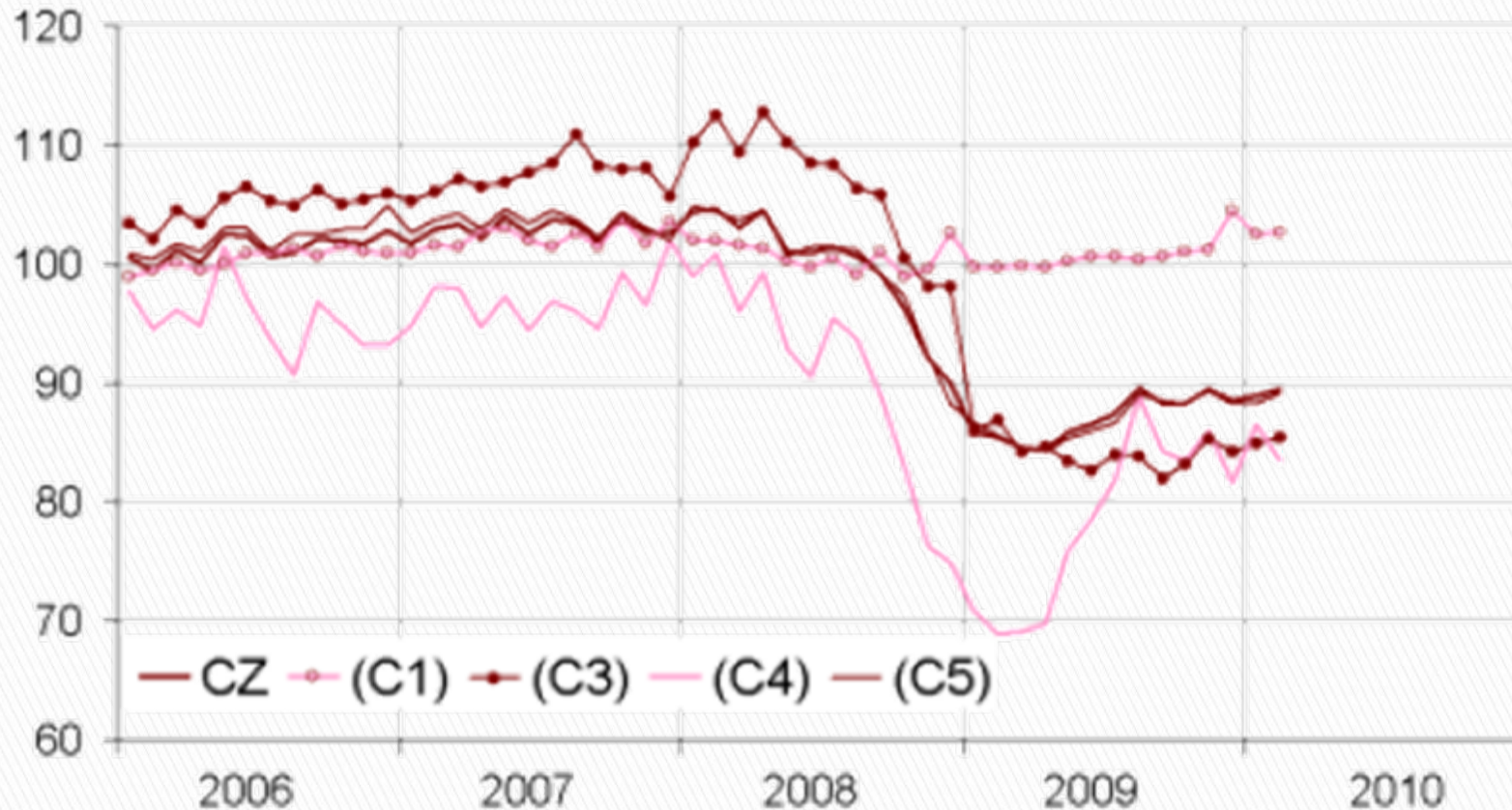
# ACTUAL GENERAL ECONOMIC SITUATION

# ACTUAL GENERAL ECONOMIC SITUATION

## GDP Evolution in France



# INDUSTRIAL PRODUCTION



**CZ - Manufacturing Industries**

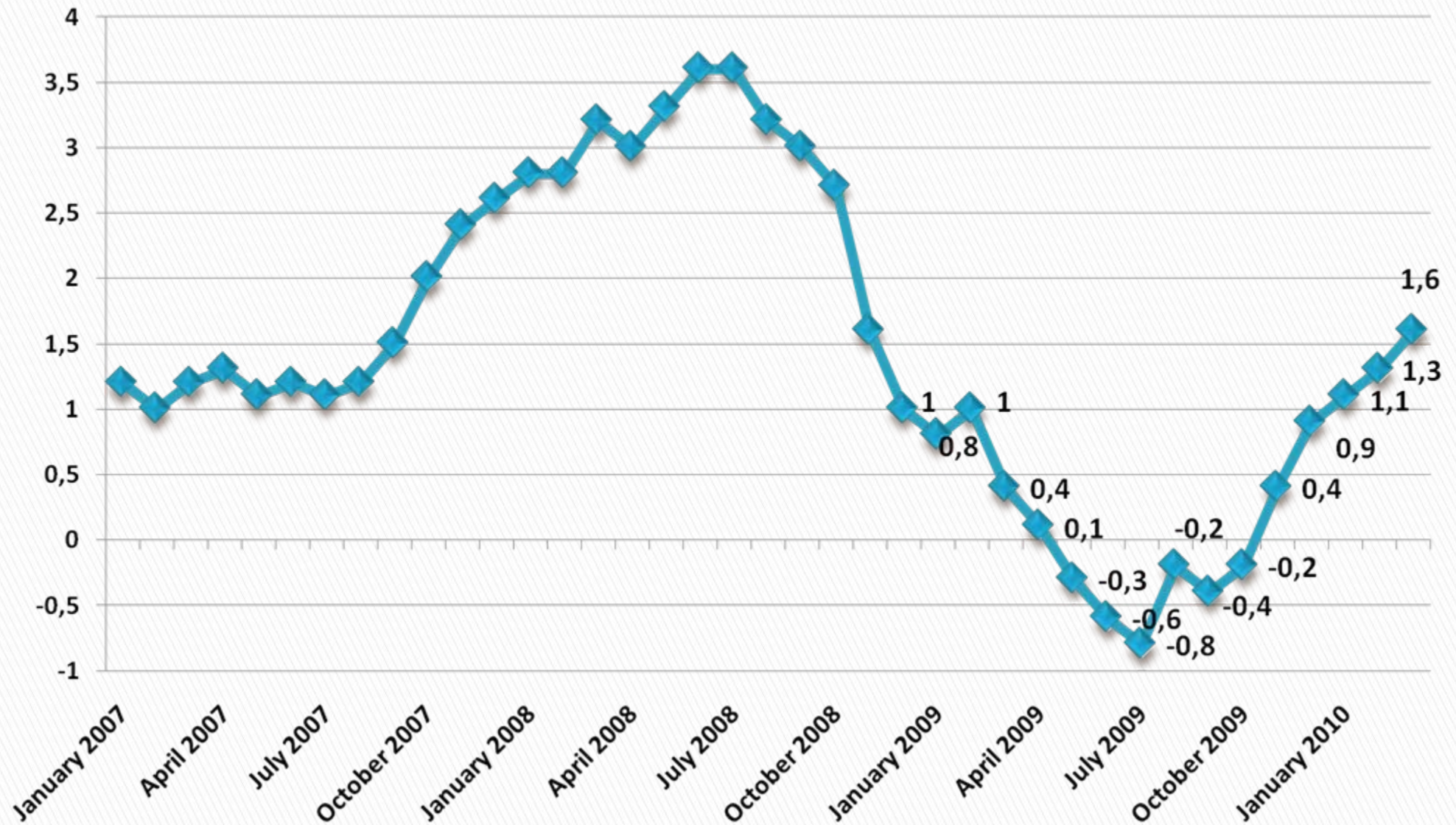
**C1 - Agrarian and food industries**

**C3 - Electrical and electronic equipment**

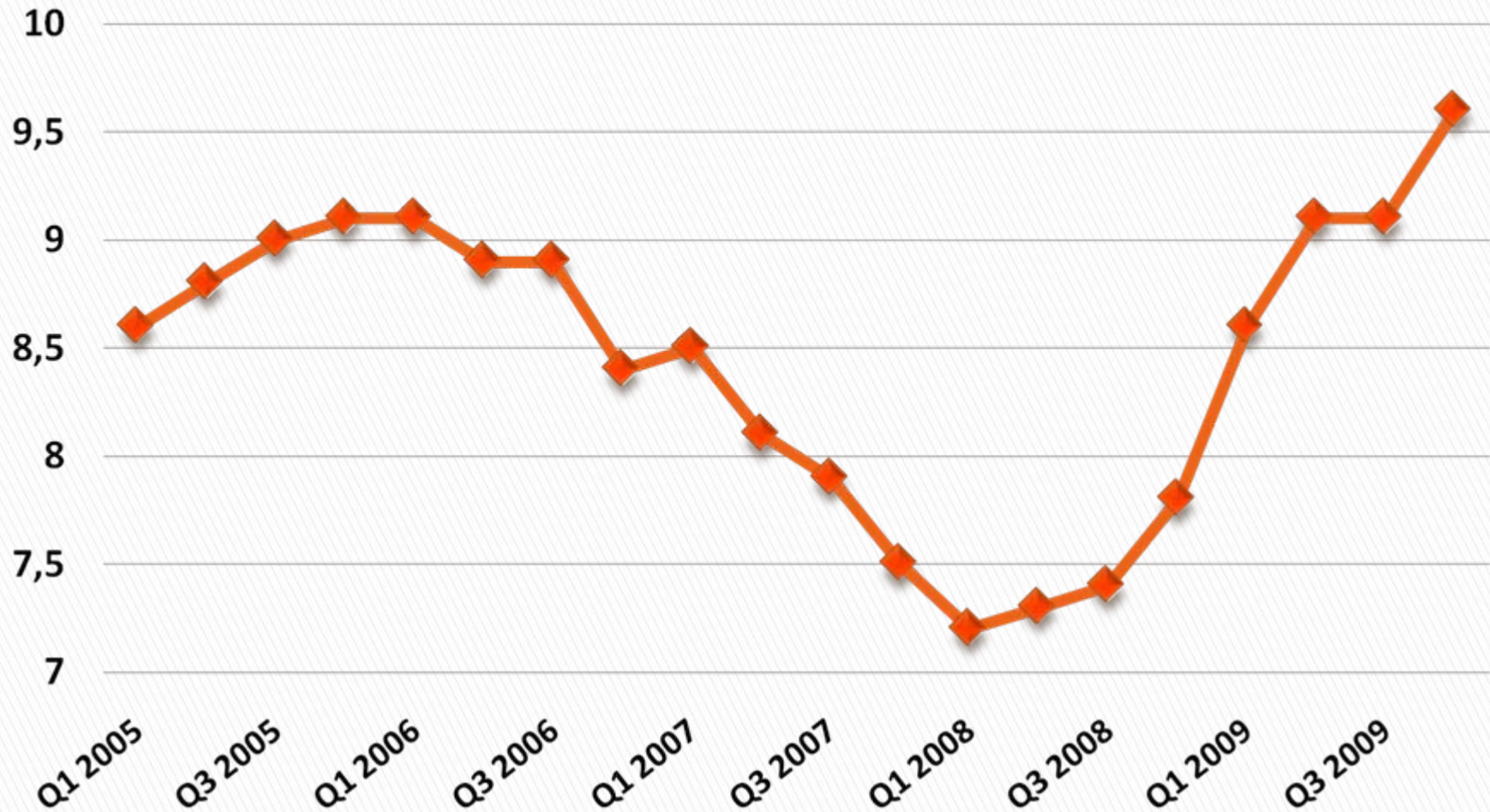
**C4 - Equipments of transport**

**C5 - Other manufacturing products**

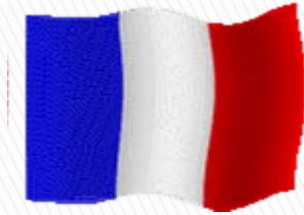
# INFLATION



# UNEMPLOYMENT RATE (%)



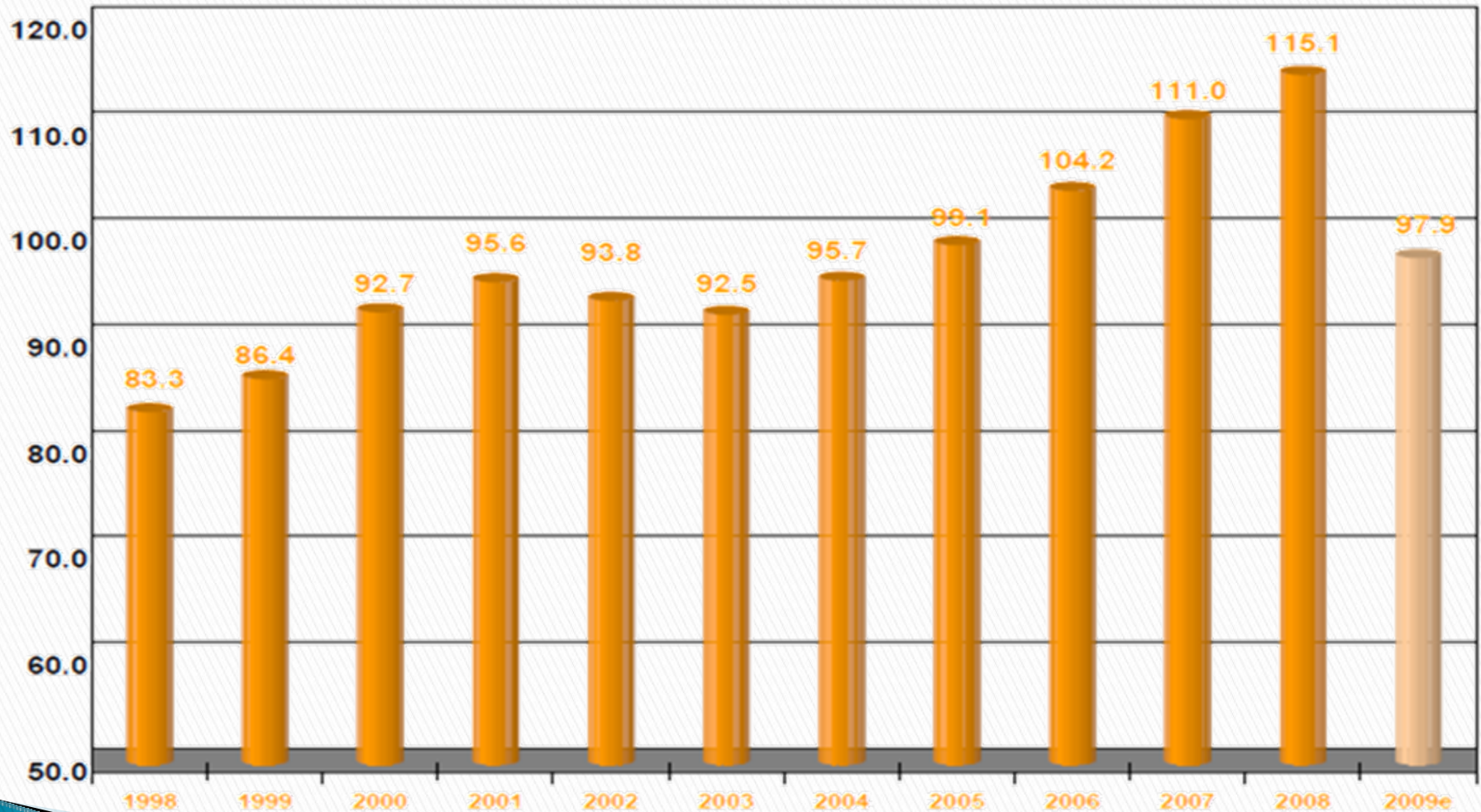
Q4 2008	Q4 2009
7,8 %	9,6 %



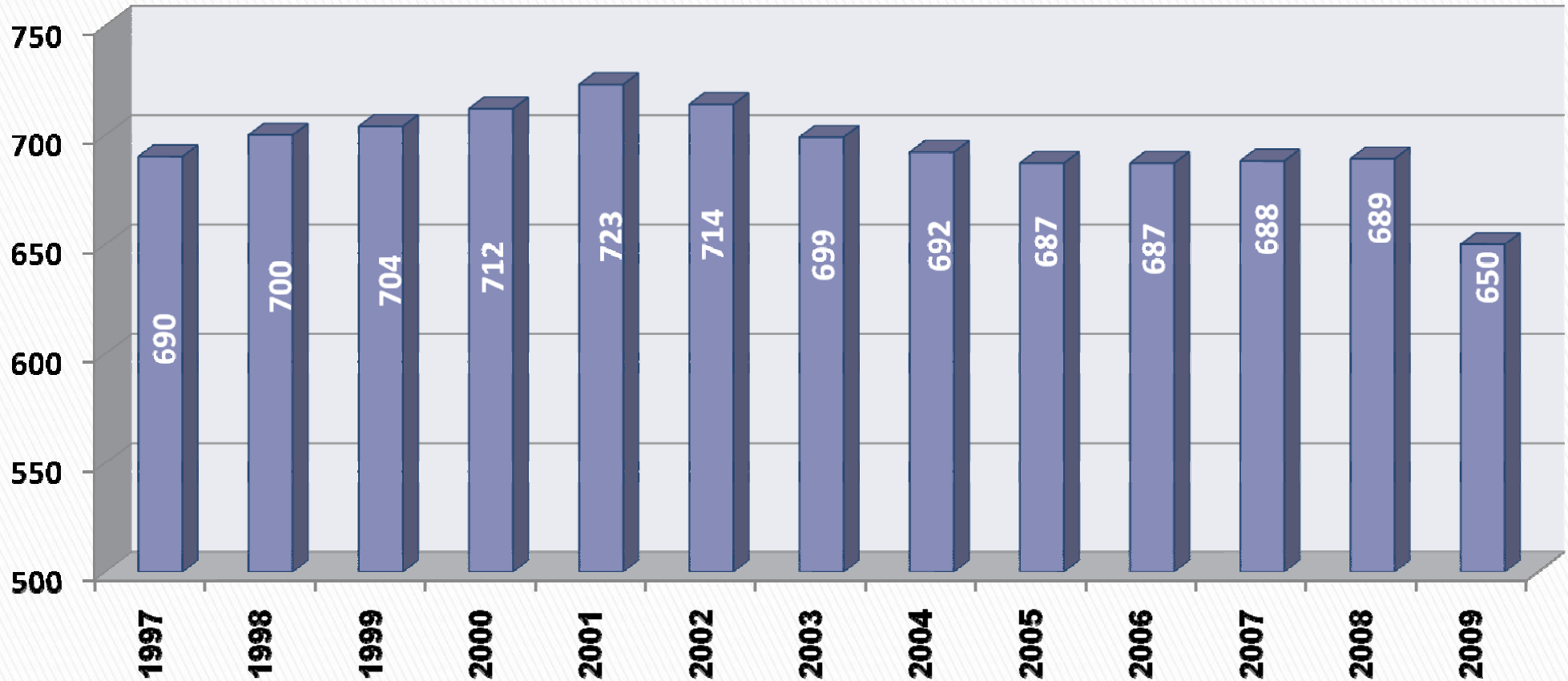
# ECONOMIC SITUATION OF FRENCH MECHANICAL INDUSTRY SECTOR in 2009

# MECHANICAL INDUSTRIES: TOTAL PRODUCTION

In billions €



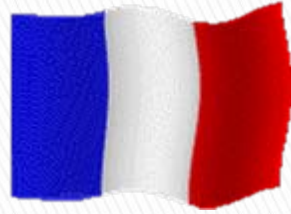
# EMPLOYMENT IN MECHANICAL INDUSTRIES (Thousands of employees)



**French Mechanical Industries: First Industrial Employer in France**  
**2009 : - 5,5 % 650 000 employees**

# FRENCH MECHANICAL INDUSTRIES - COMMENTS

- ▶ **French Mechanical Industry Investment 2009: - 25%**
- ▶ **French Total Investment Industry: - 24 %**

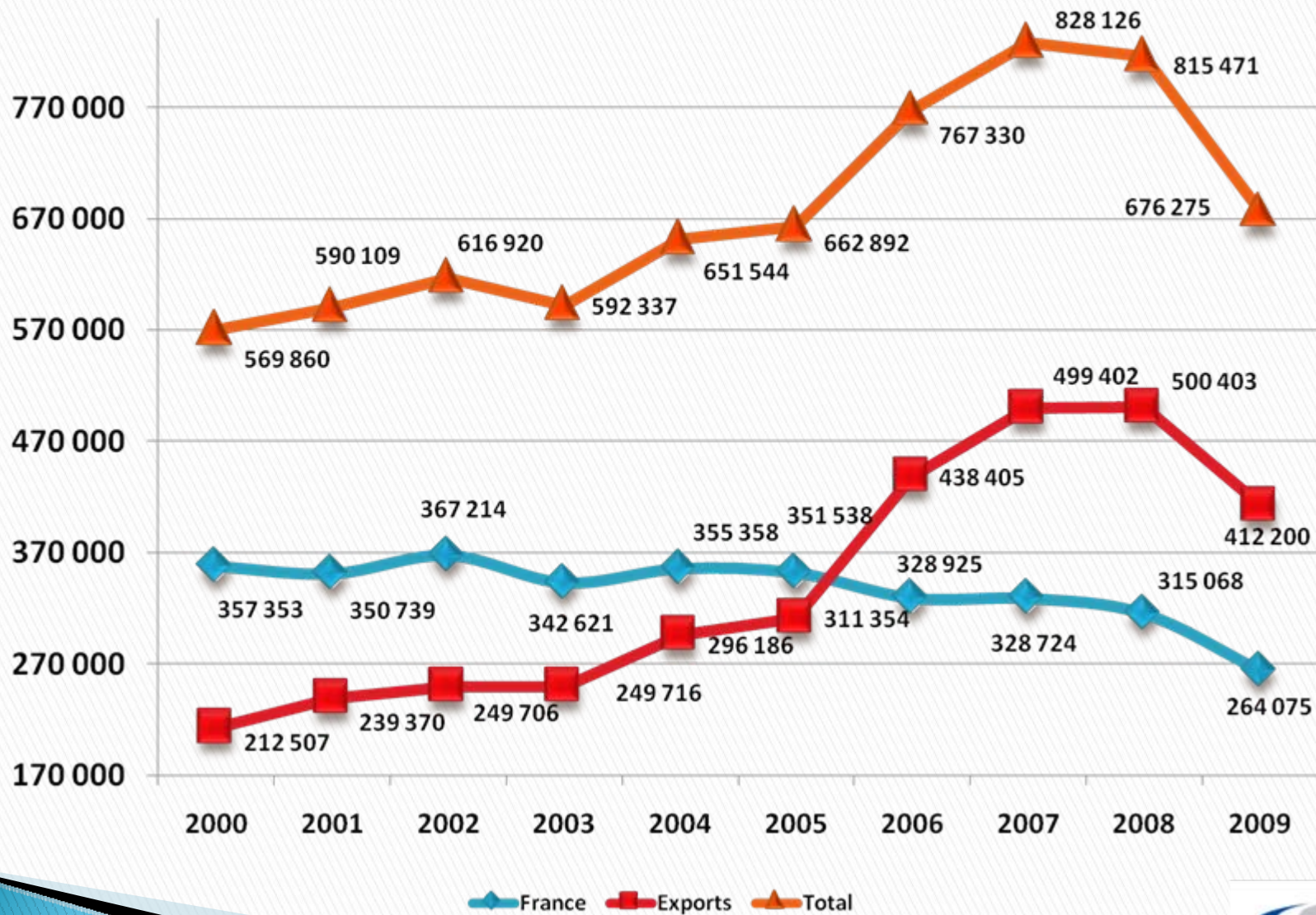


# ECONOMIC SITUATION OF POWER TRANSMISSION INDUSTRY SECTOR in 2009

## SITUATION IN POWER TRANSMISSION (without bearings)

	2009	Evolution 2009 / 2008	Forecast 1st Quarter 2010
<b>French Production in 1000 euro</b>	<b>676 275</b>	<b>- 17,07 %</b>	<b>na</b>
<b>Orders in 1000 euro</b>	<b>635000</b>	<b>- 24,7 %</b>	<b>na</b>

# POWER TRANSMISSION PRODUCTION IN MILLIONS €- 2009

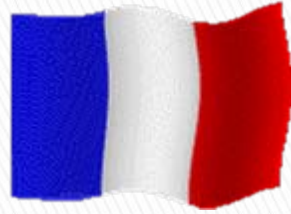


# SITUATION IN POWER TRANSMISSION - COMMENTS

- ▶ **Important and very fast decreasing of the incoming orders**
- ▶ **Postponement and cancellation of orders**
- ▶ **No visibility for the next months**
- ▶ **Financial difficulties of customers**

## WEAK CUSTOMER GROUPS

- ▶ All customers' groups are affected ,
- ▶ Specially automotive industry and construction machines.
- ▶ Only Energy, Defense and Rail were positive

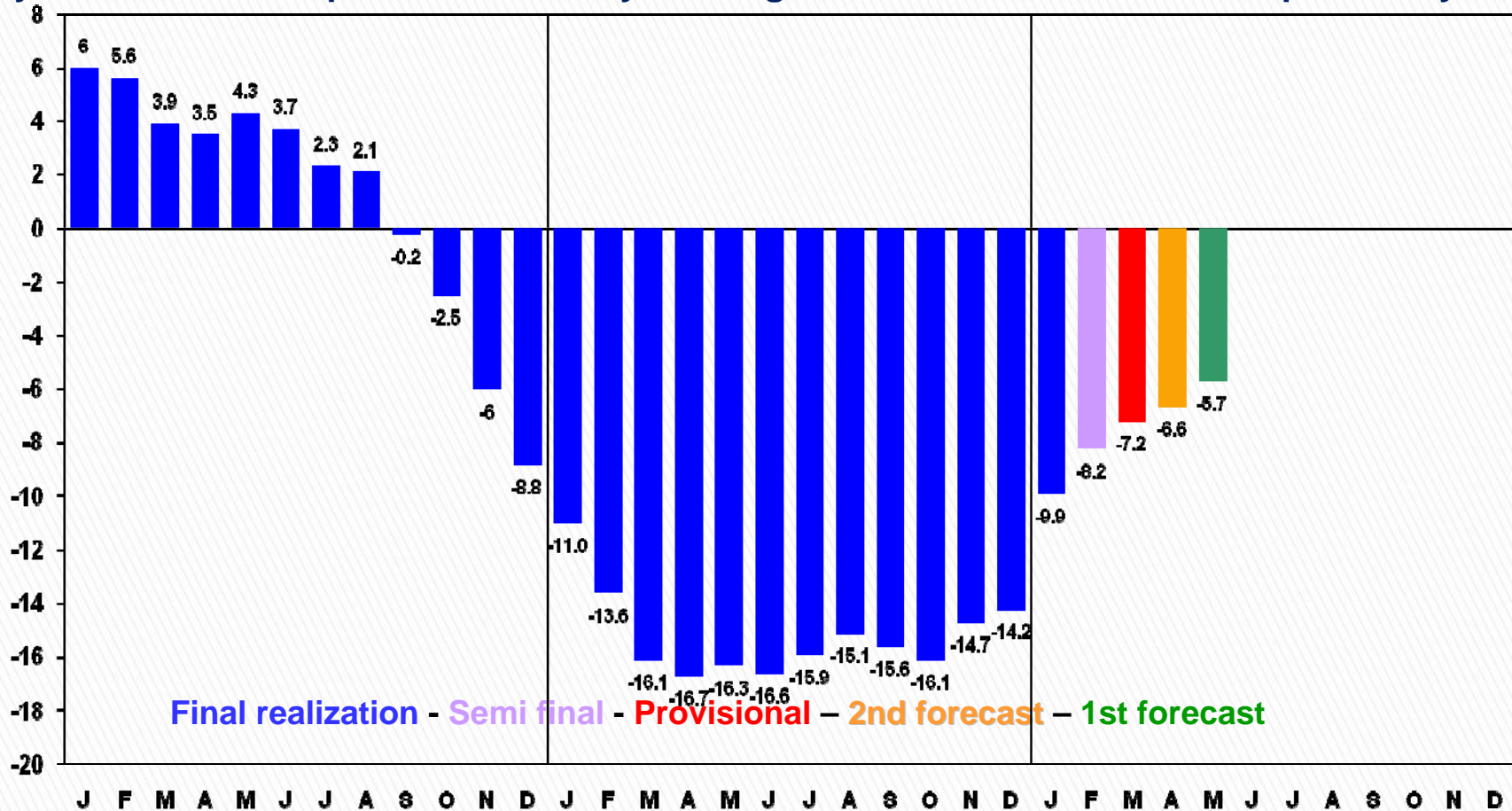


# FORECASTS FOR 2010 For Mechanical Industry

# BAROMETER OF THE MECHANICAL INDUSTRIES

## MAY 2010

Monthly variations of the productive activity with regard to the same month of the previous year, in %



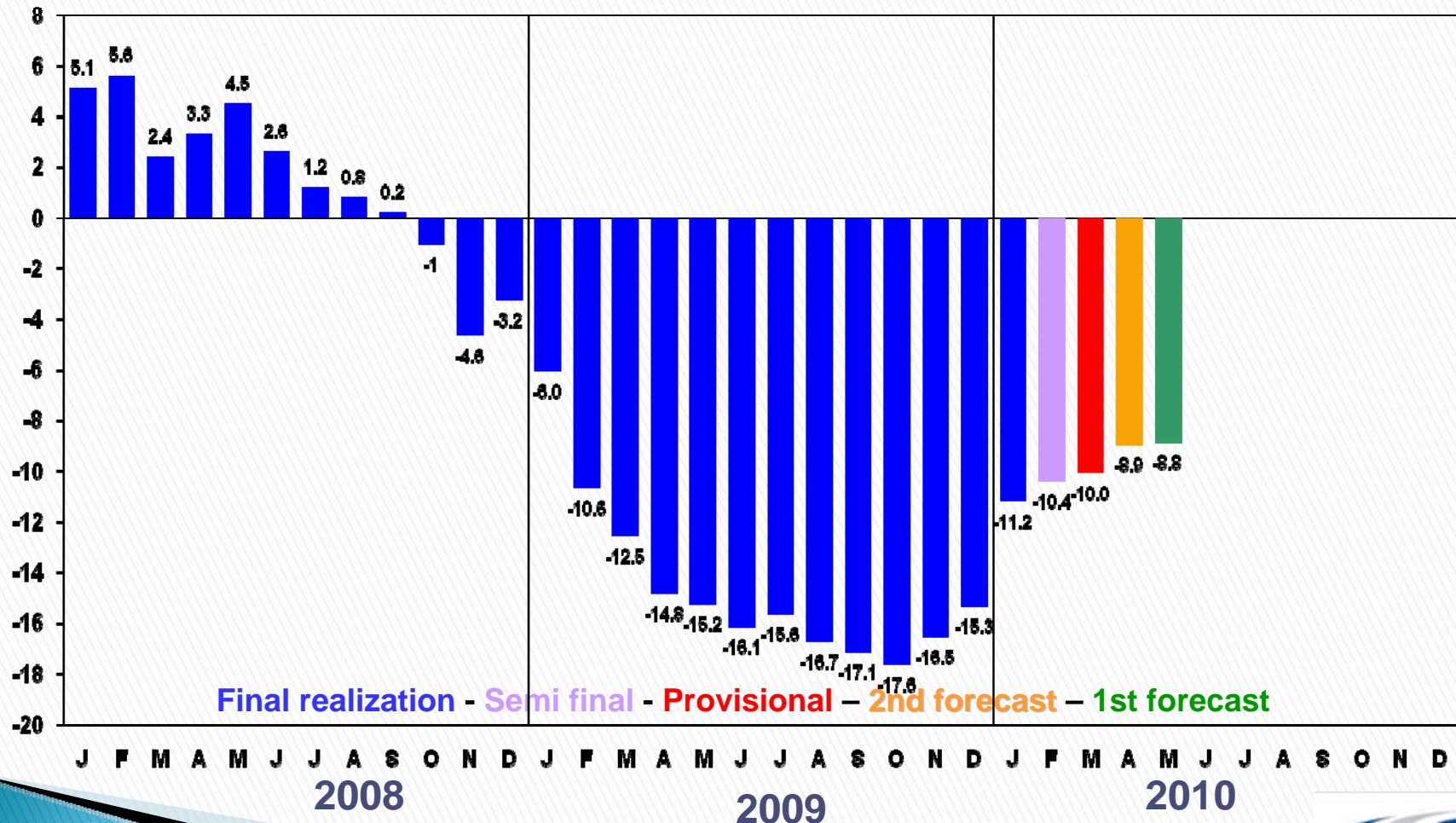
2008

2009

2010

# BAROMETER FOR THE MECHANICAL ENGINEERING INDUSTRY MAY 2010

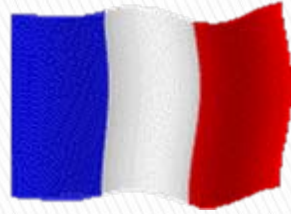
Monthly Variations of the productive activity with regard to the same month of the previous year, in %



# FORECASTS

Forecasts for 2010  
Mechanical Engineering Industry

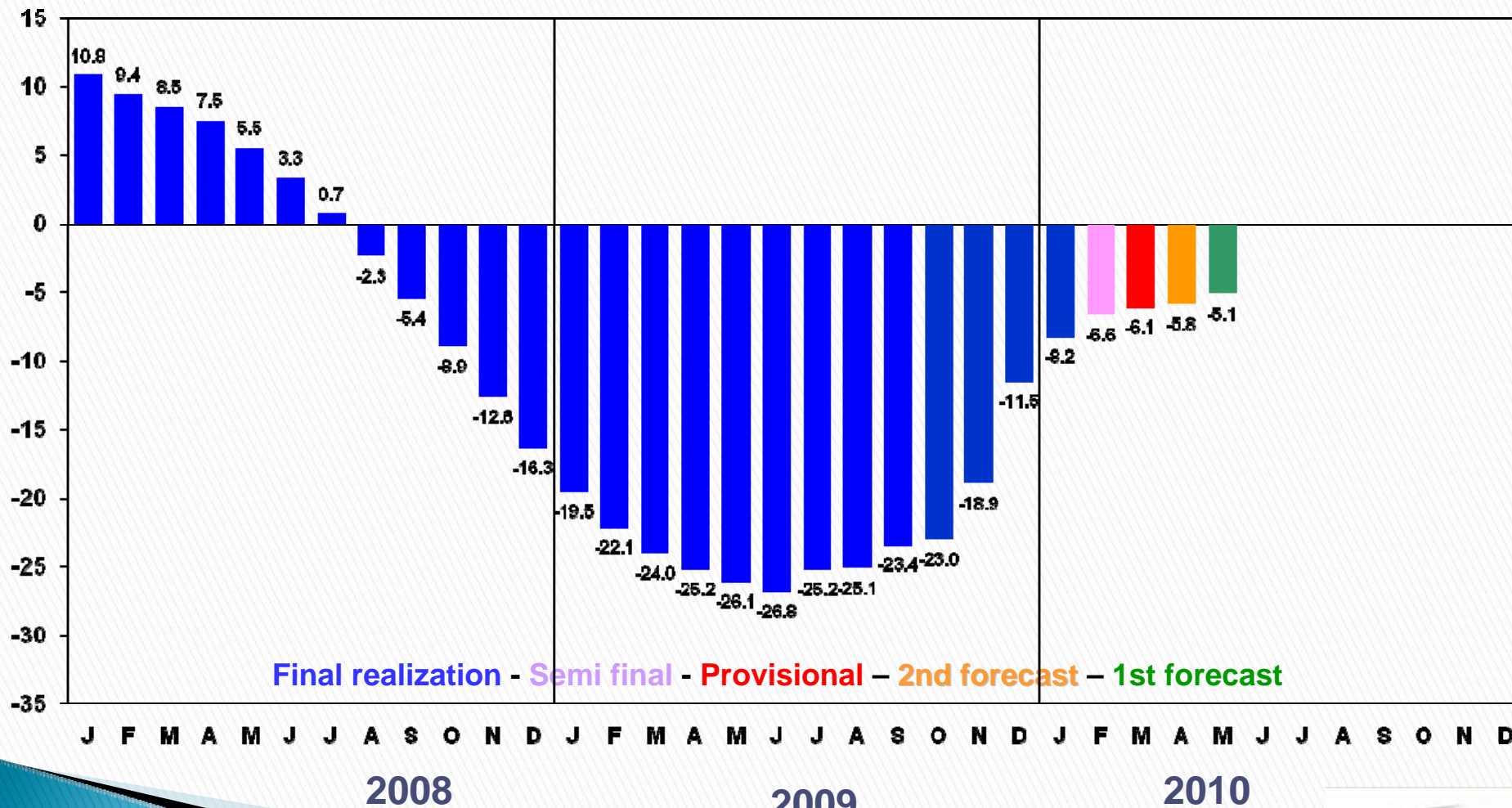
**Between 0 and + 2%**



# FORECASTS FOR 2010 For Power Transmission Industry

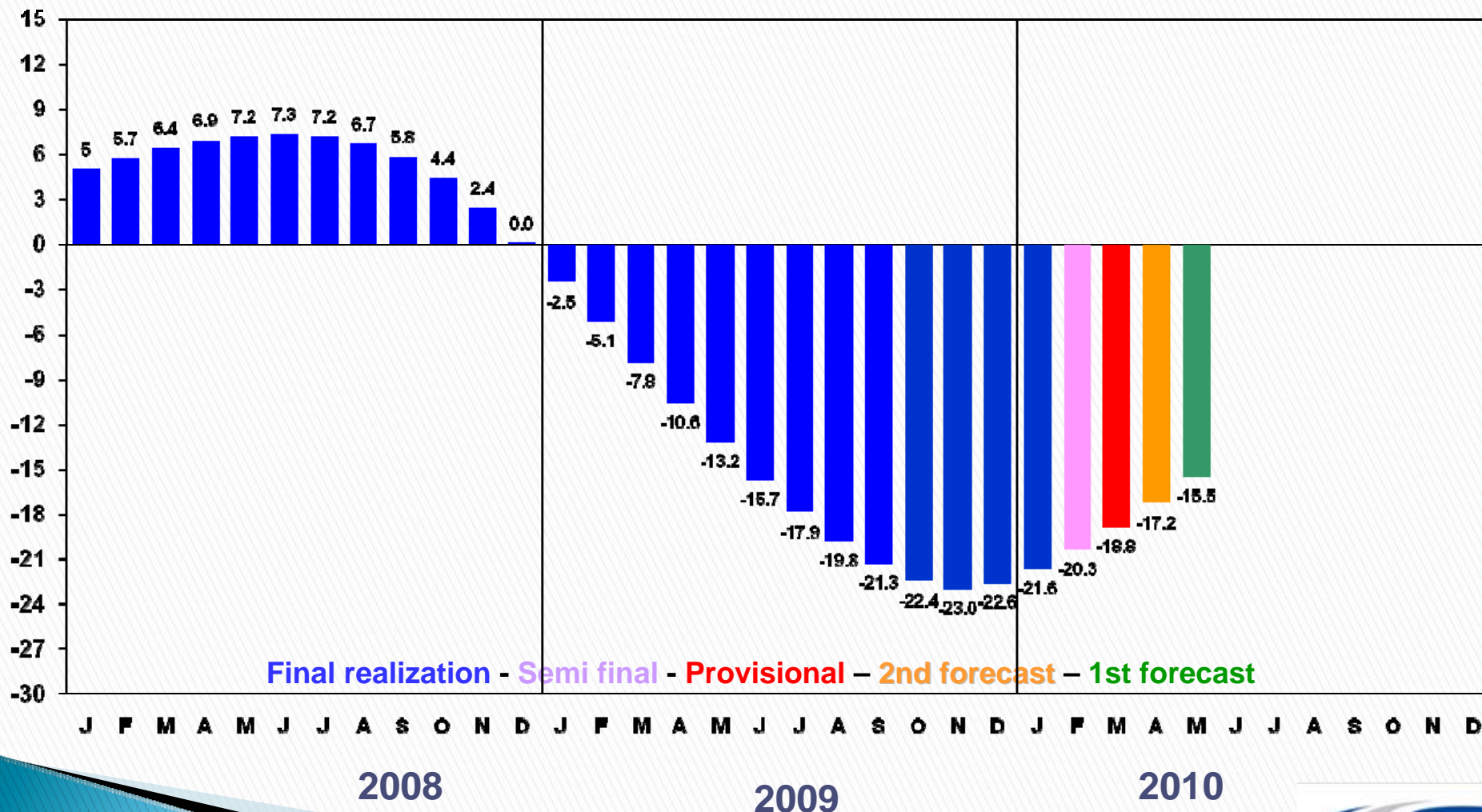
# BAROMETER FOR ALL TRANSMISSION INDUSTRIES MAY 2010

Annual slip in % of volume and the productive activity

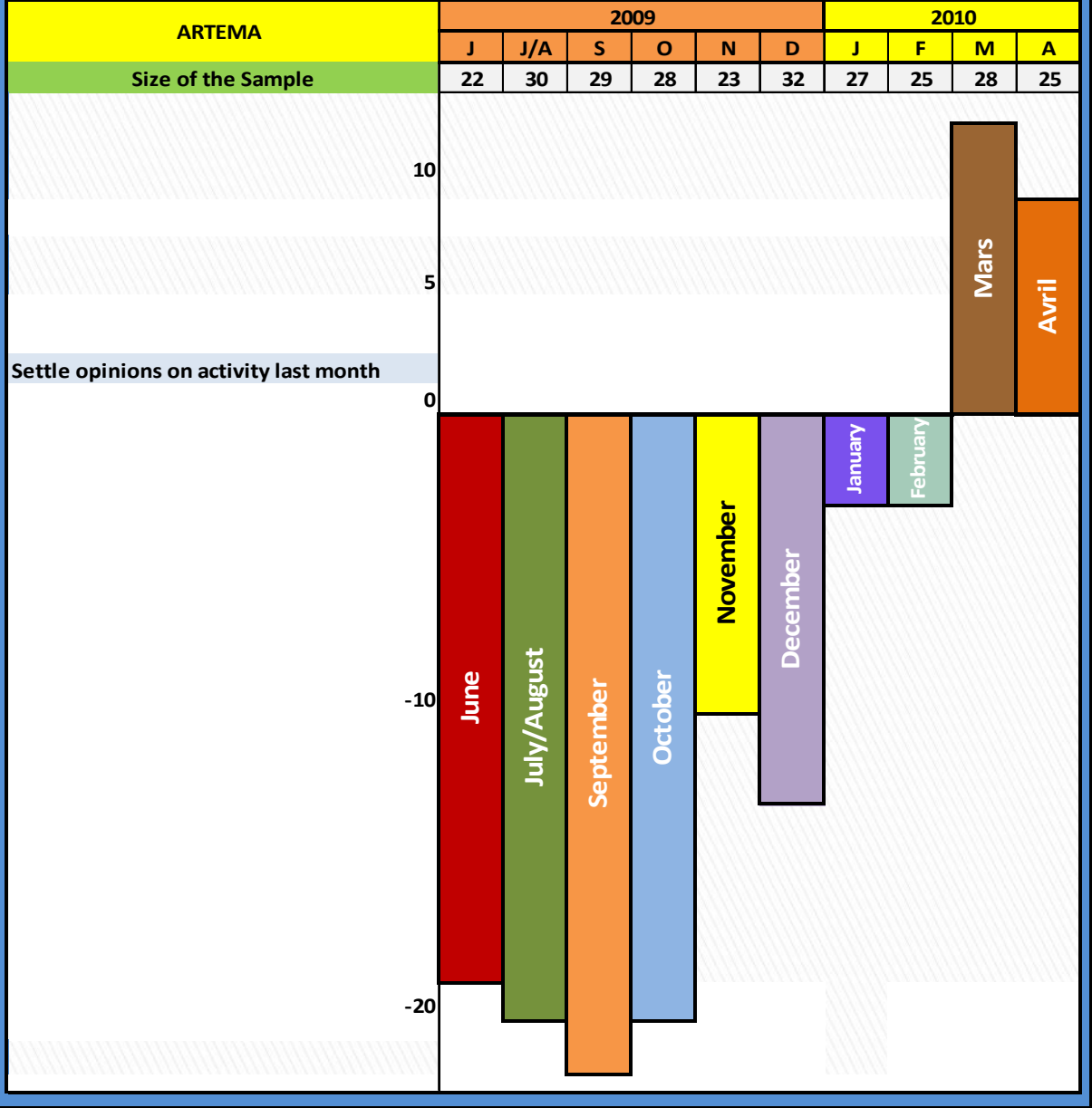


# BAROMETER FOR ALL TRANSMISSION INDUSTRIES MAY 2010

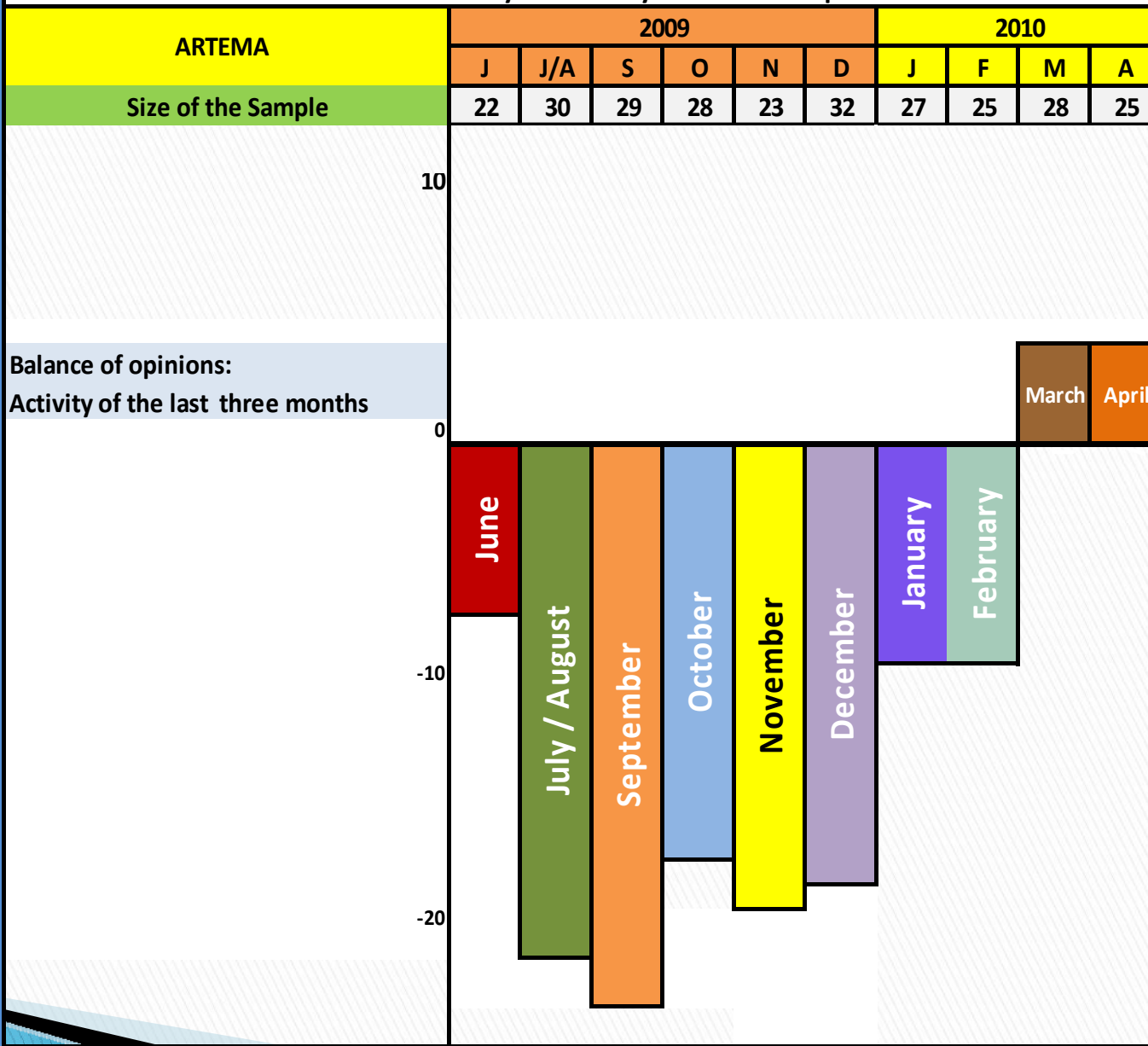
Evolution in % of the production, the mobile accumulation of the last 12 months



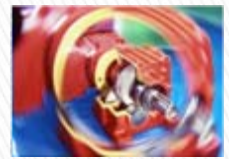
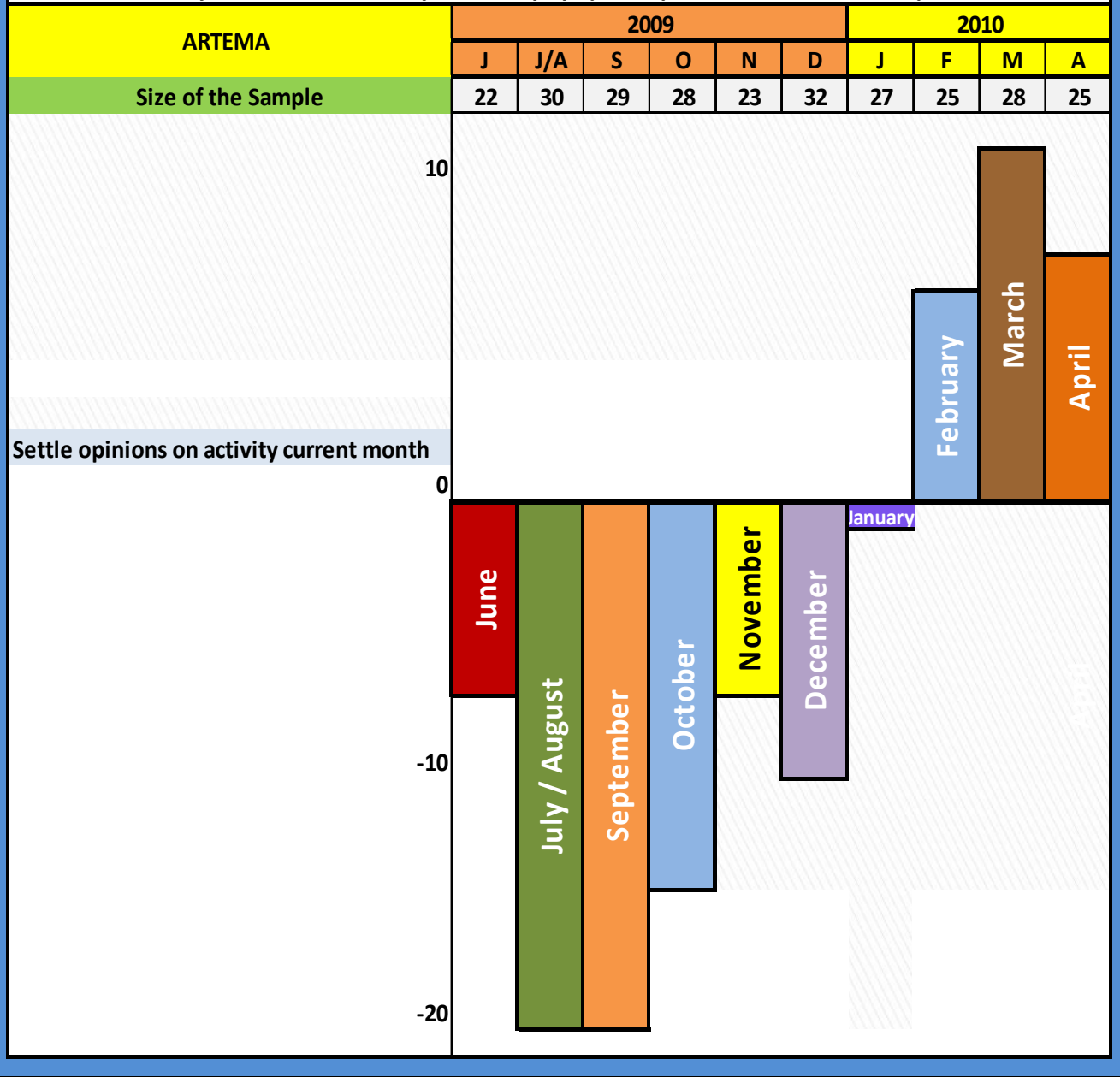
Monthly Indicator of tendency on activity by opinion poll to the members companies



Indicator of tendency on activity : Balance of opinions

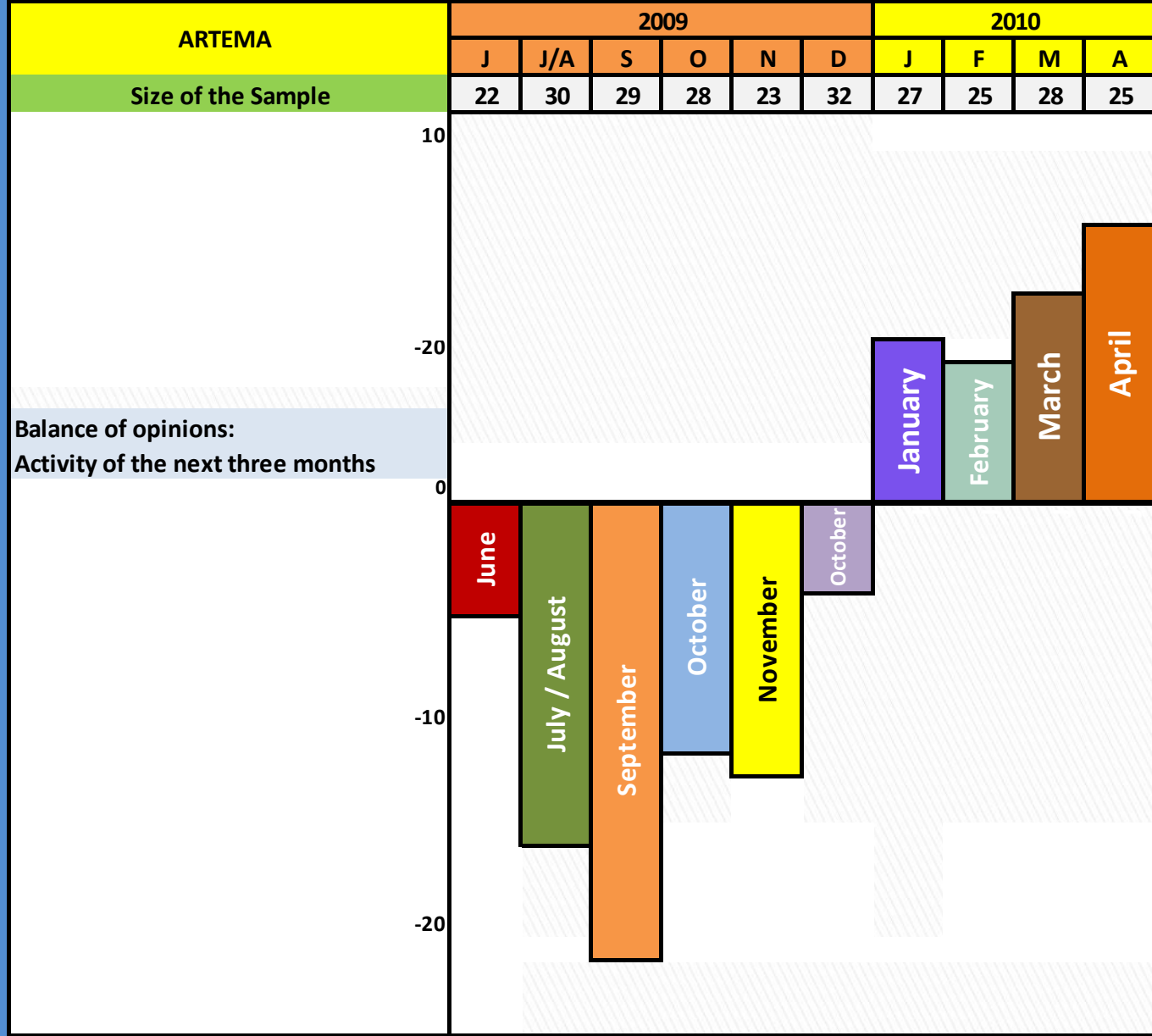


Monthly Indicator of tendency on activity by opinion poll to the members companies



Settle opinions on activity current month

Indicator of tendency on activity : Balance of opinions



# SITUATION IN POWER TRANSMISSION - COMMENTS

- ▶ **Slow growth supported by exports**
- ▶ **Not just a technical rebound**
- ▶ **Some new projects**

# FORECASTS FOR THE NEXT SIX MONTHS

## 1. By REGIONS

### Orders

Expectations - 2010

	Decrease				0	Increase		
	NA	> -10%	>-5% - (-10%)	<-5%		<5%	>5% - 10%	>10%
Europe and Africa						●		
Asia and Australia					●			
Americas				●				

### Shipments

Expectations - 2010

	Decrease				0	Increase		
	NA	> -10%	>-5% - (-10%)	<-5%		<5%	>5% - 10%	>10%
Europe and Africa						●		
Asia and Australia						●		
Americas					●			

# FORECASTS FOR THE NEXT SIX MONTHS

## 2. By PRODUCTS

### Orders

Expectations - 2010

	Decrease				Increase			
	NA	> -10%	>-5% - (-10%)	<-5%	0	<5%	>5% - 10%	>10%
	Open Gearing						●	
Worm Gearing						●		
Helical Gearing						●		
Bevel Gearing						●		
Planetary Gearing						●		
Couplings and Clutches						●		
						●		
Gear motors						●		

### Shipments

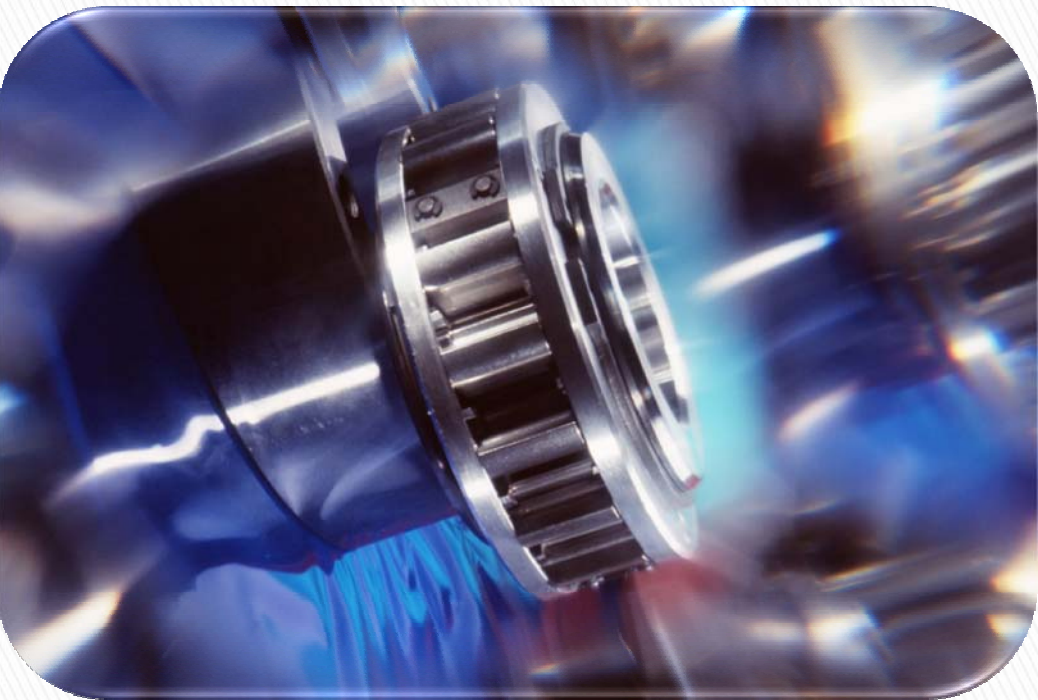
Expectations - 2010

	Decrease				Increase			
	NA	> -10%	>-5% - (-10%)	<-5%	0	<5%	>5% - 10%	>10%
	Open Gearing						●	
Worm Gearing					●			
Helical Gearing						●		
Bevel Gearing						●		
Planetary Gearing					●			
Couplings and Clutches						●		
						●		
Gear motors						●		

# FORECASTS

Forecasts for 2010  
Power Transmissions

**Between +5 and +10%**



39/41, rue Louis Blanc  
92038 PARIS LA DEFENSE  
☎ 33 1 47 17 63 69  
artema-france.org  
info@artema-france.org

