

ARGE Working Conference
KRAKOW

Market Report
WG A - Statistics

8th of September 2006

WG A - Statistics

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WG A - Statistics

WG A collects statistical and economical information to be presented in ARGE Conferences using annual questionnaire adressed to ARGE National Associations.

The questionnaire is planned to illustrate trends of the market situation the way ARGE members that meet or feel.

- Q1 Economic situation of the Industry*
- Q2 Building activity*
- NEW Q3 Sales value of the Industry by product group*
- Q4 Competition from South East Asia*
- NEW Q5 Share of ARGE members in total sales*

ARGE WORKING GROUP A – STATISTICS – QUESTIONNAIRE CONCERNING THE MARKET SITUATION

Country:

Population:

THE ECONOMIC SITUATION OF THE BUILDERS HARDWARE INDUSTRY IN YOUR COUNTRY

Fill in the turnover in 2004, 2005 and your estimate for 2006 in proportion to 2003.

2003	2004	2005	2006 ESTIMATE
100			

BUILDING ACTIVITY IN YOUR COUNTRY

Quote the number of completed apartments in 2005. Give your estimate of

- the trend for 2006 in %-change and
- the share of refurbishment in the building activity.

2005	TREND 2006 +- %	REFURB. % 2005

The size of the local market compared to other countries as well as the competition from low cost countries are of a great interest among ARGE members. Mark the data known to you or give your best estimates by product groups.

SALES VALUE IN YOUR COUNTRY BY PRODUCT GROUP IN 2005

SALES VALUE (the size of the local market):

Quote the total sales of BH manufacturers and importers to their customers (like distributors, wholesalers, door/window OEM, locksmiths, retail, building contractors, integrators, dealers, installers, ironmongers) of the defined product groups excluding export and including import.

LOW COST:

Mark by product group if the competition in 2005 from low cost countries (labour cost below 6 €/h, see the list) was

- D = Decreased
- U = Unchanged
- I = Increased

Labour Costs [€/h] in 2002 Metal Manufacturing (Sources: CEEMET, SVAPU ...)			
Norway	30,8	Italy	17,4
Switzerland	30,3	Ireland	16,5
Germany	28,6	Korea	10,1
USA	25,5	Poland	5,8
Denmark	25,2	Taiwan	5,6
Belgium	23,7	Czech	5,2
Netherlands	23,0	Hungary	4,6
Japan	22,6	Brasil	3,8
Spain	21,8	Estonia	3,8
Finland	21,4	Mexico	3,0
Sweden	21,4	Lithuania	2,9
UK	20,6	Latvia	2,6
Austria	20,3	Russia	2,2
Canada	18,8	China	0,8
France	18,2	India	0,6

PRODUCT GROUP	SALES VALUE [M€]	LOW COST D - U - I
Single point locks		
Multi point locks		
Electromechanical locks		
Mechanical cylinders		
Electromechanical cylinders		
Hinges		
Lever and knob handles, pulls		
Door closers		
Door automatics		
Panic / emergency devices		
Industrial locks		
Padlocks		
Window hardware		
TOTAL		

Estimate the %-share of ARGE members in the total sales value	
Specify other product group(s) of your interest to be asked next time	

WG A - Statistics

*ONLY TWO COMPLETE ANSWERS WERE RECEIVED
Finland and Poland*

Sales by product group - too difficult to determine the data !

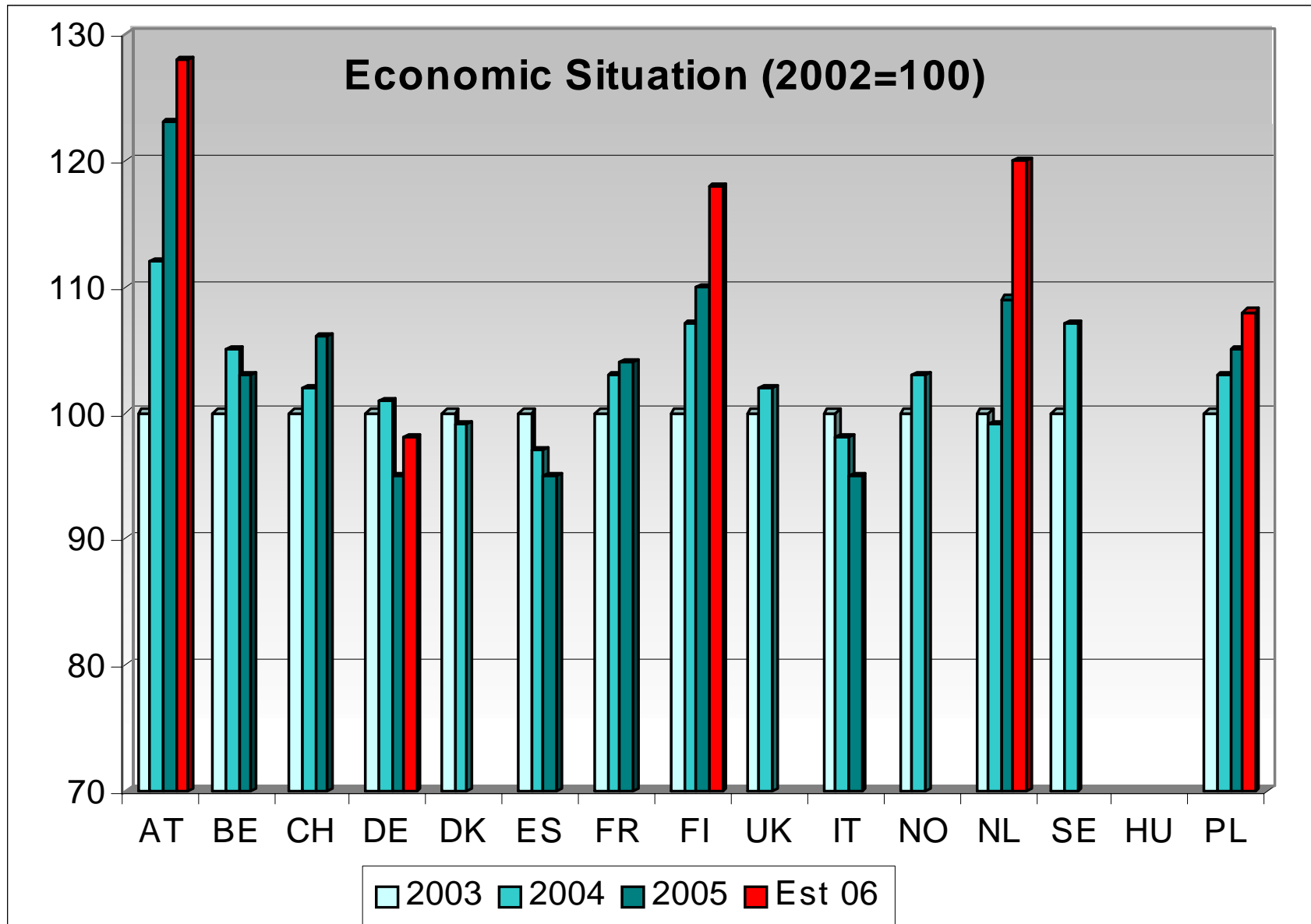
THANK YOU !

ARGE WGA STATISTICS

Results will be presented in the next ARGE Conference in Krakow in September 2006

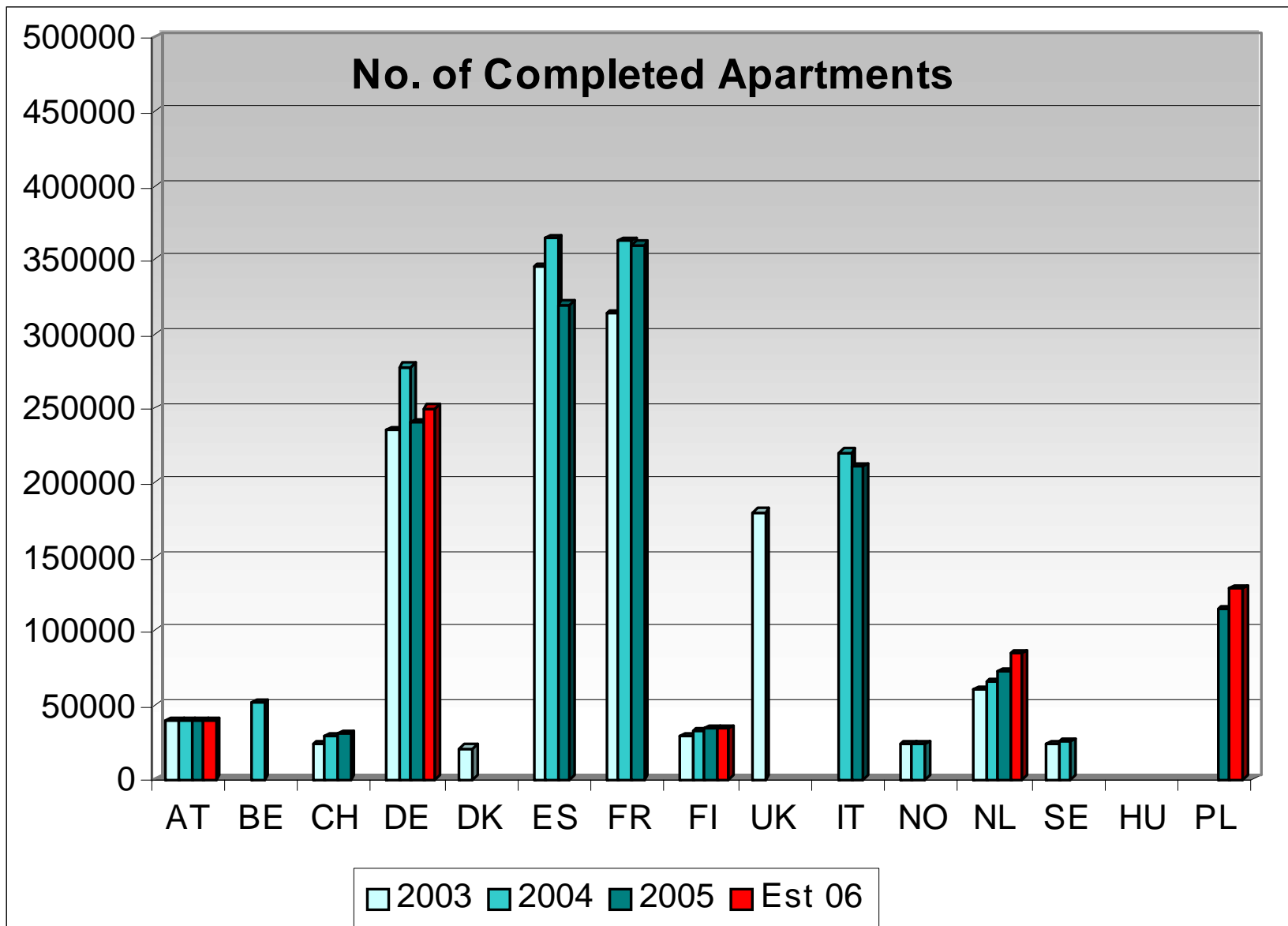
Market information

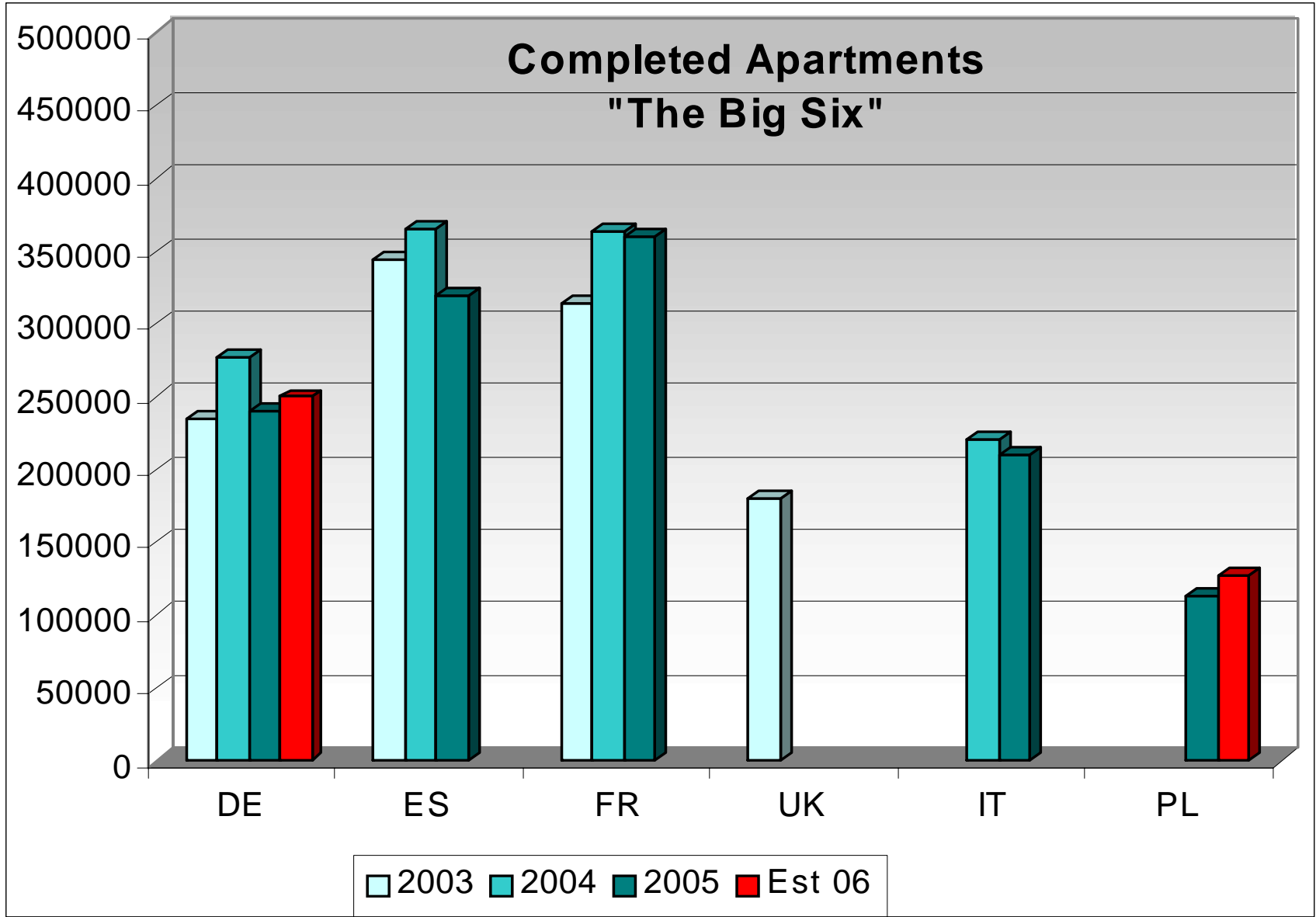
*The economic situation of the Building
Hardware Industry (turnover) compared to
2003 being 100*

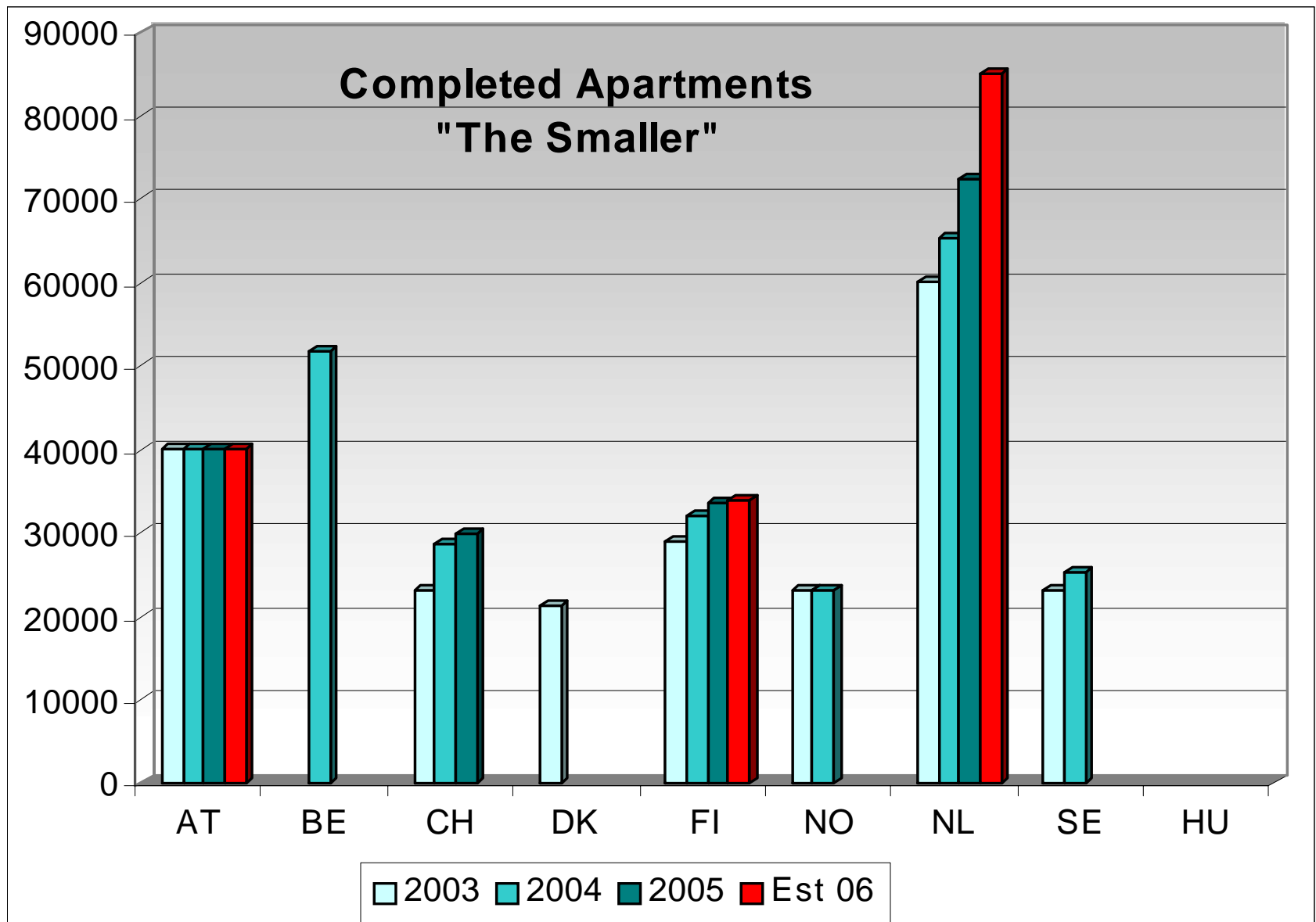


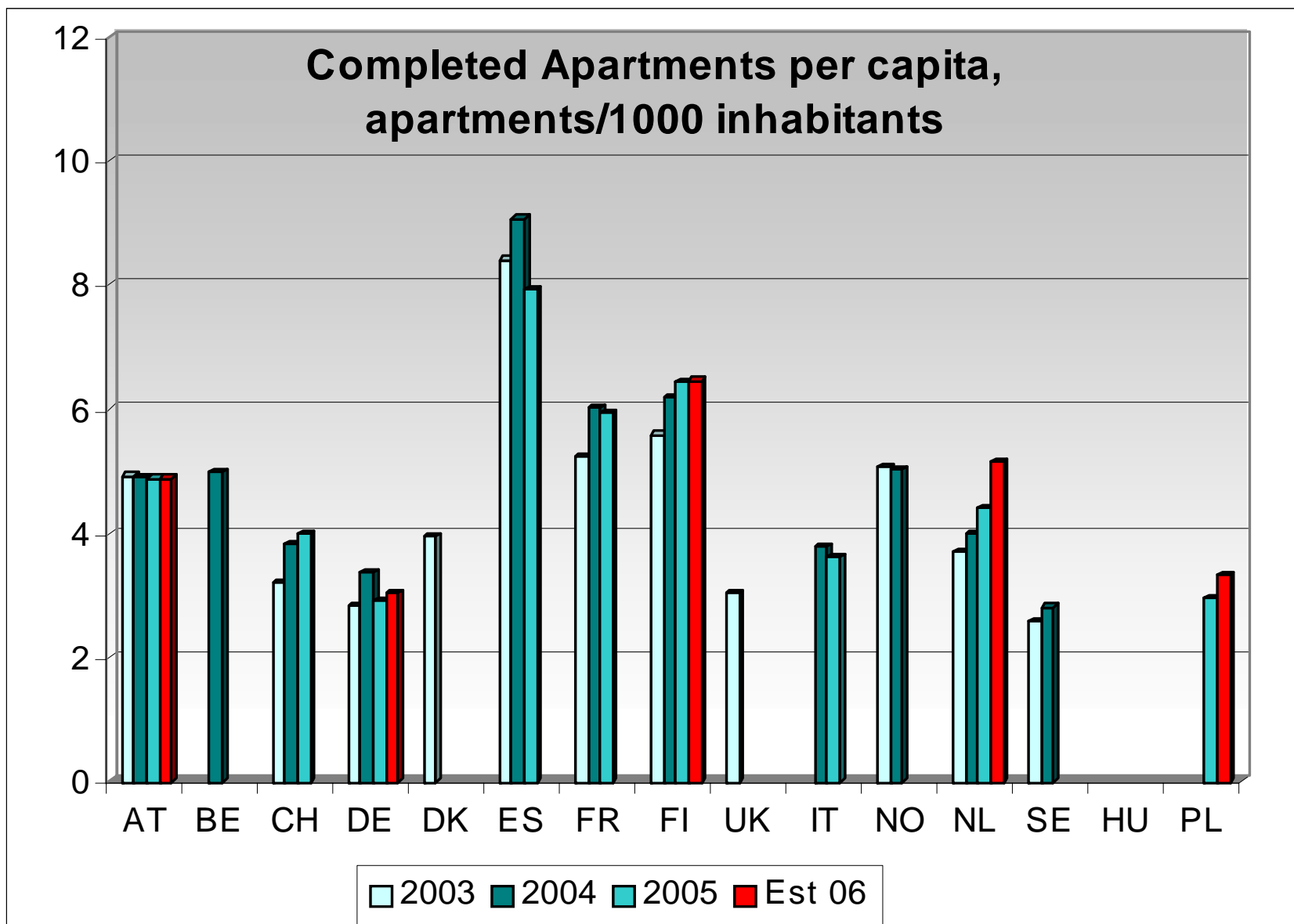
Market information

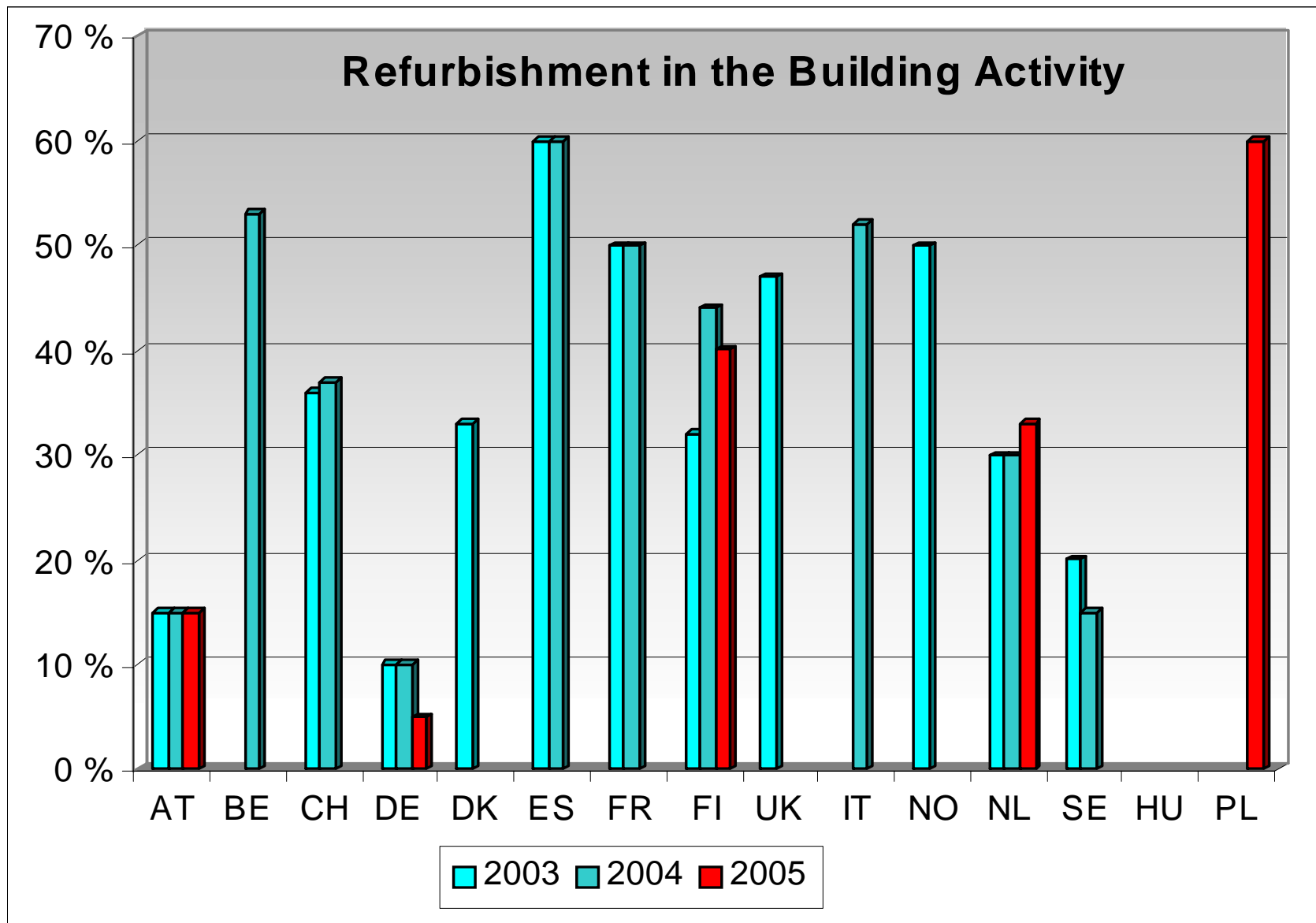
*Building activity
(apartments & refurbishment)*









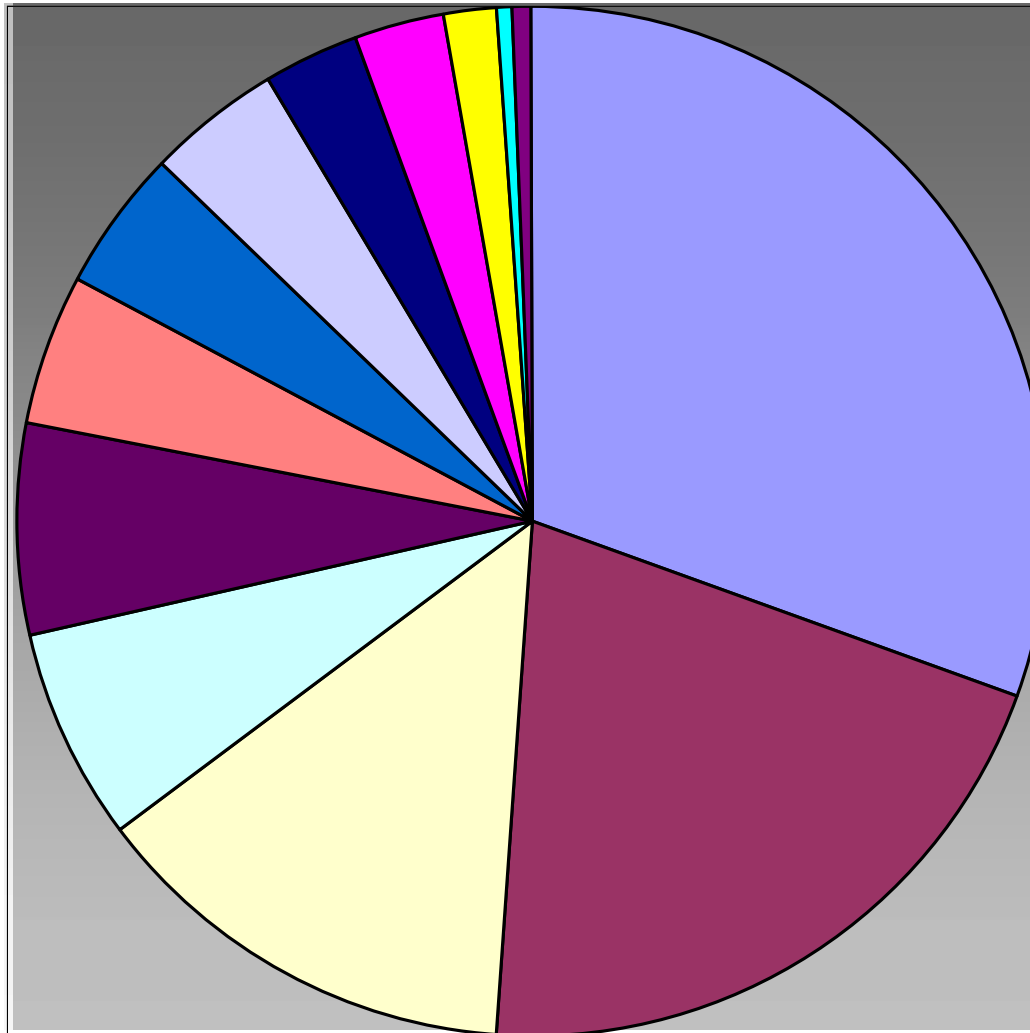


Sold Value of Building Hardware Mill. EUR

*Sales Value (the size of the local market)
and the %-share of ARGE members in this.*

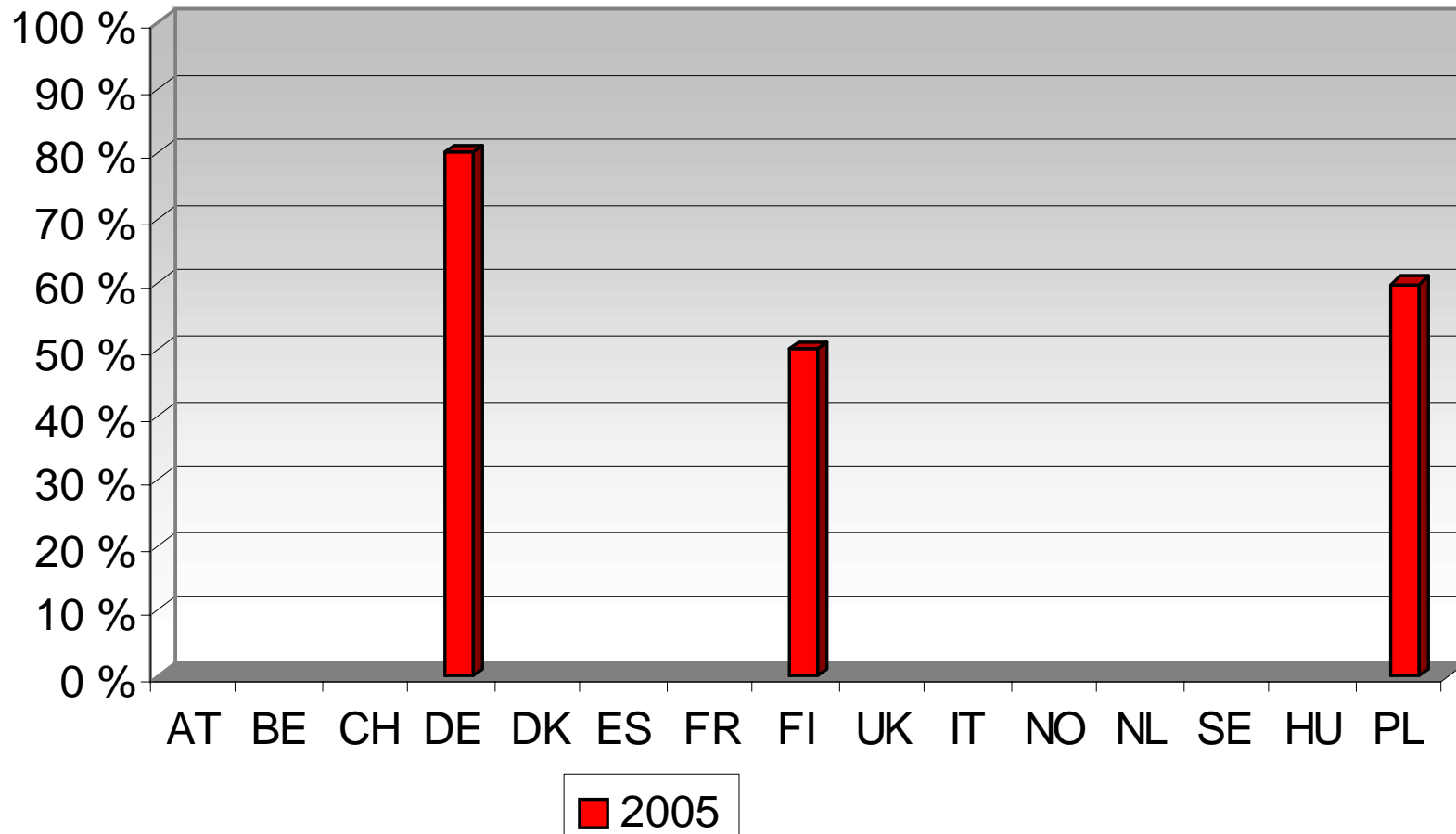
*Quote the total sales of BH manufacturers and
importers to their customers (like distributors,
wholesalers, door/window OEM, locksmiths, retail,
building contractors, integrators, dealers, installers,
ironmongers) of the defined product groups excluding
export and including import.*

Sales by product group Finland + Poland 2005 Local market



- Window hardware
- Lever and knob handles pulls
- Mechanical cylinders
- Single point locks
- Hinges
- Door closers
- Door automatics
- Padlocks
- Industrial locks
- Electromechanical locks
- Multipoint locks
- Panic / emergency devices
- Electromechanical cylinders

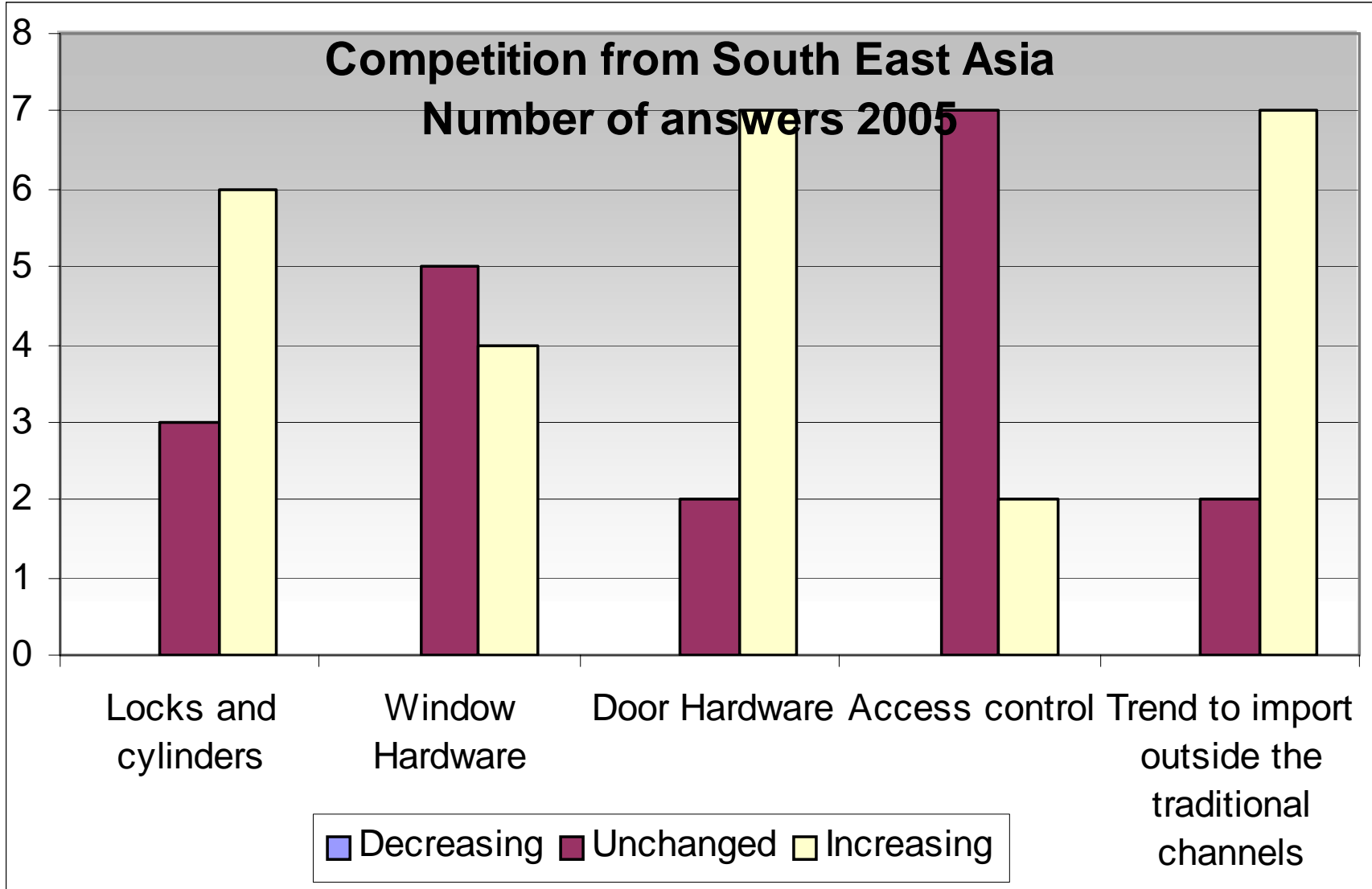
Share of ARGE members in the local sales

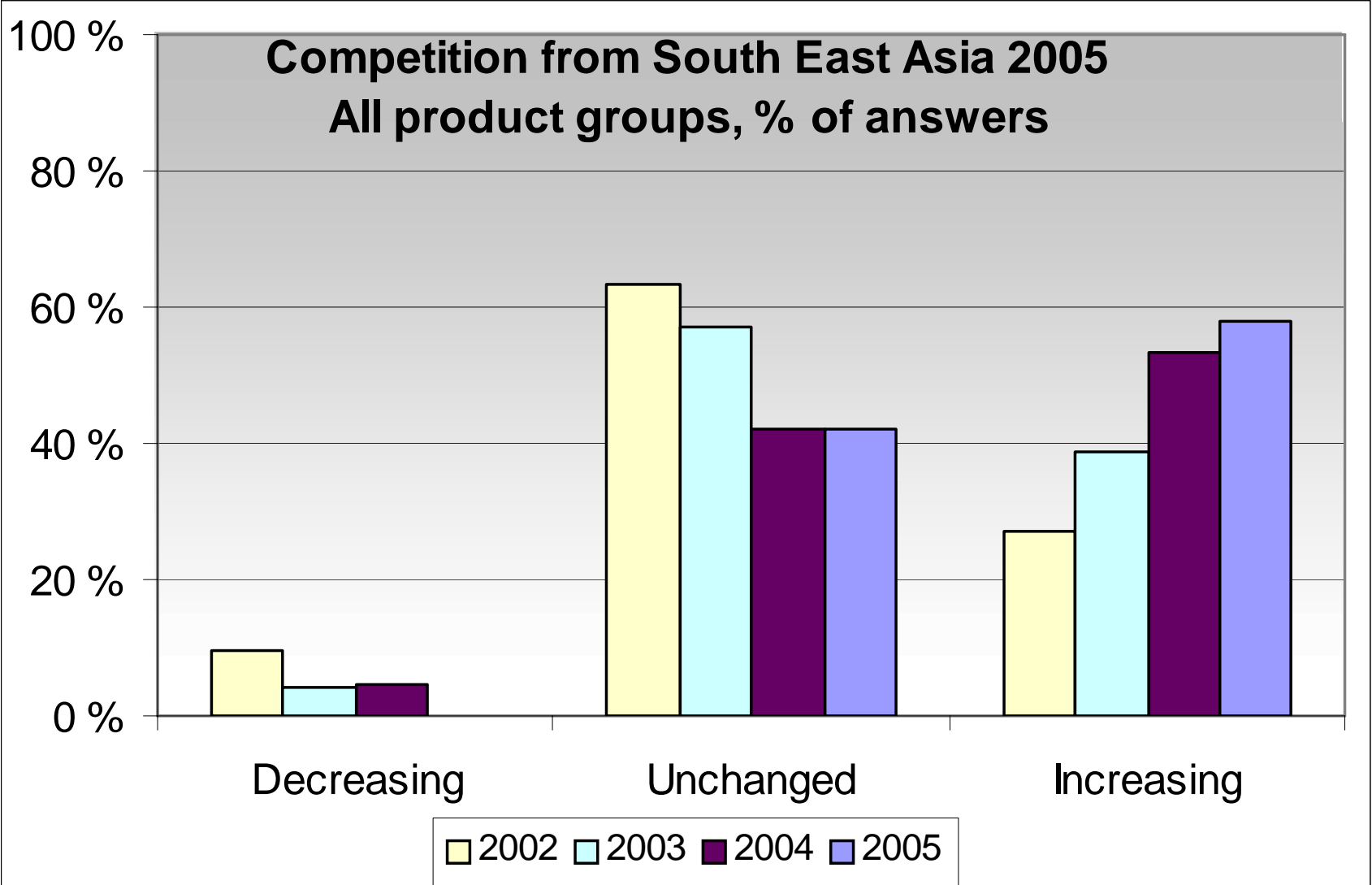


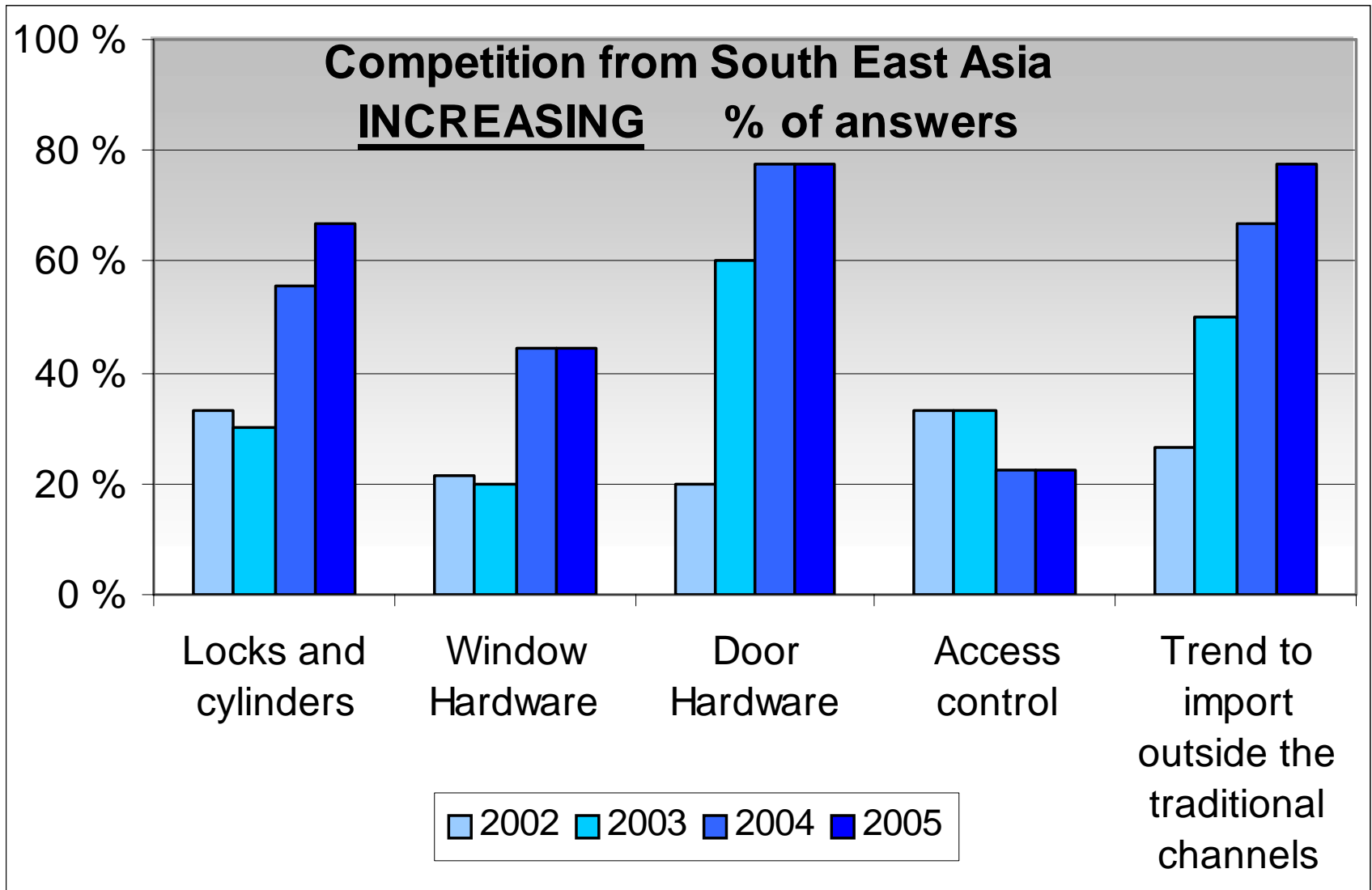
Competition from South-East Asia (from 2005 questionnaire)

Members to give the best estimation of the most significant trend concerning the competition from South-East Asia.

*Is the competition **decreasing, unchanged or increasing** in locks&cylinders, window hw, door hw, access control and what is the trend to import outside traditional channels*







To the Presidential Team

- WG A Statistics & WG B Market Information suggest to merge these 2 working groups to a new and powerful working group dealing with all matters of marketing and statistics
- The new WG to exploit international databases as well as to ask & analyze local market changes.