



WG M

Market

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Report September 2008

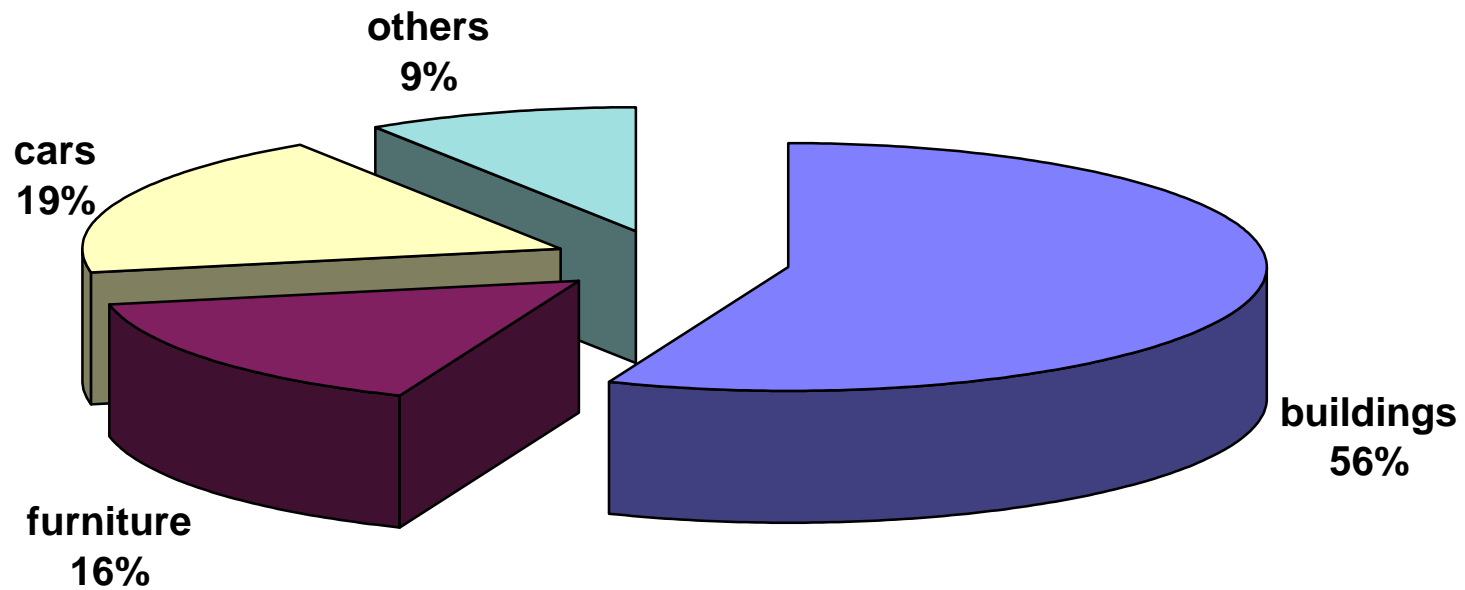


Members of WG M

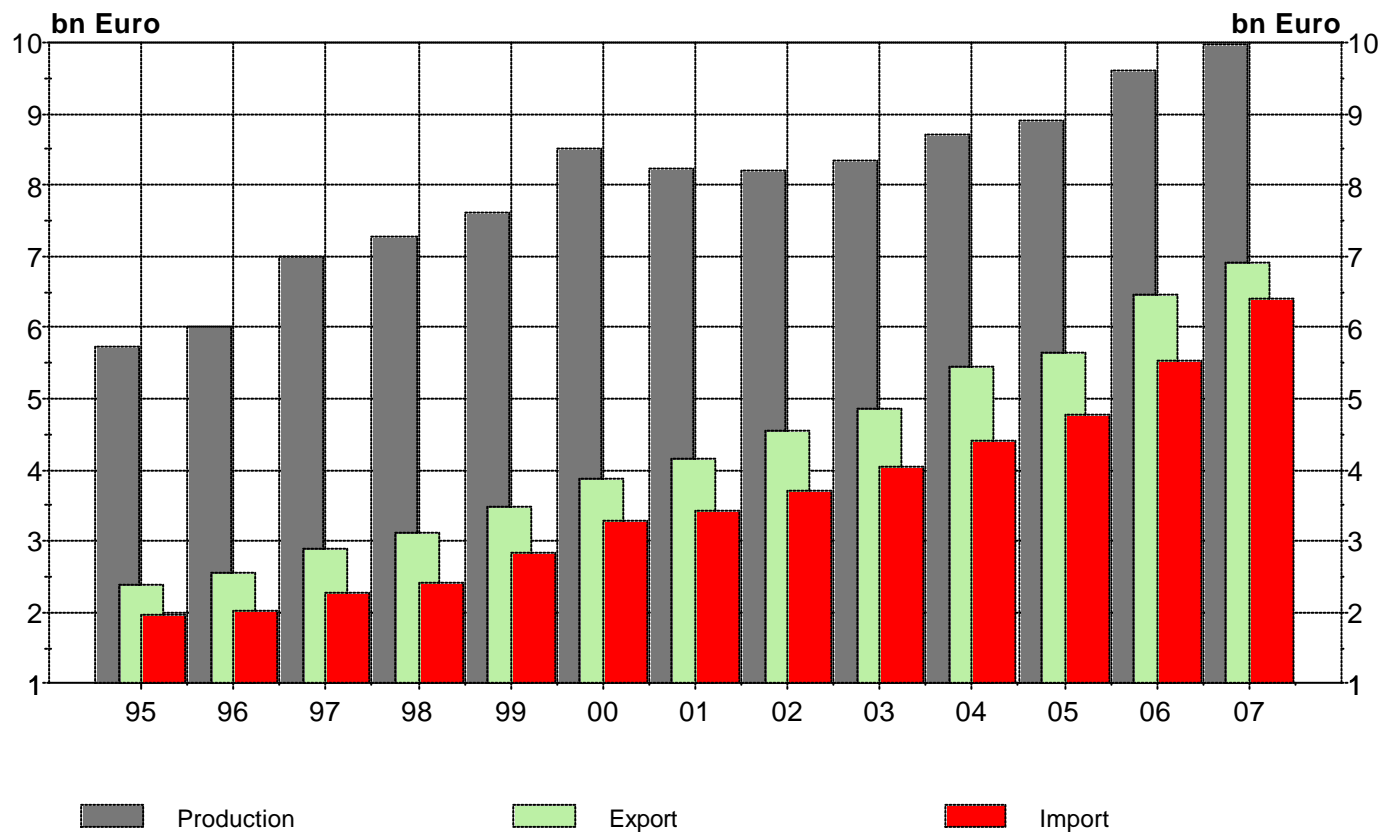
Michel Akoum	F
Werner Hülsken	D
Arjen Koole	NL
Alfred Scheurer	CH
David Whitworth	UK

Production locks and fittings for...

Value 2007: 17,8 bn EURO



Production and Foreign Trade locks and fittings for buildings EC - worldwide





ARGE – Questionnaire

WG M asked every member country:

- economic situation of the builders hardware industry
locks and fittings for doors, mortise locks, cylinders, door closers,
knob handles and window hardware
- number of manufacturers
- building activities



WG M received 7 answers – to less!!

The consequence:

- we present only a part of the results at the conference
- the complete answers are given to the delivering countries

next tasks:

- the given data must be discussed
- more countries should take part



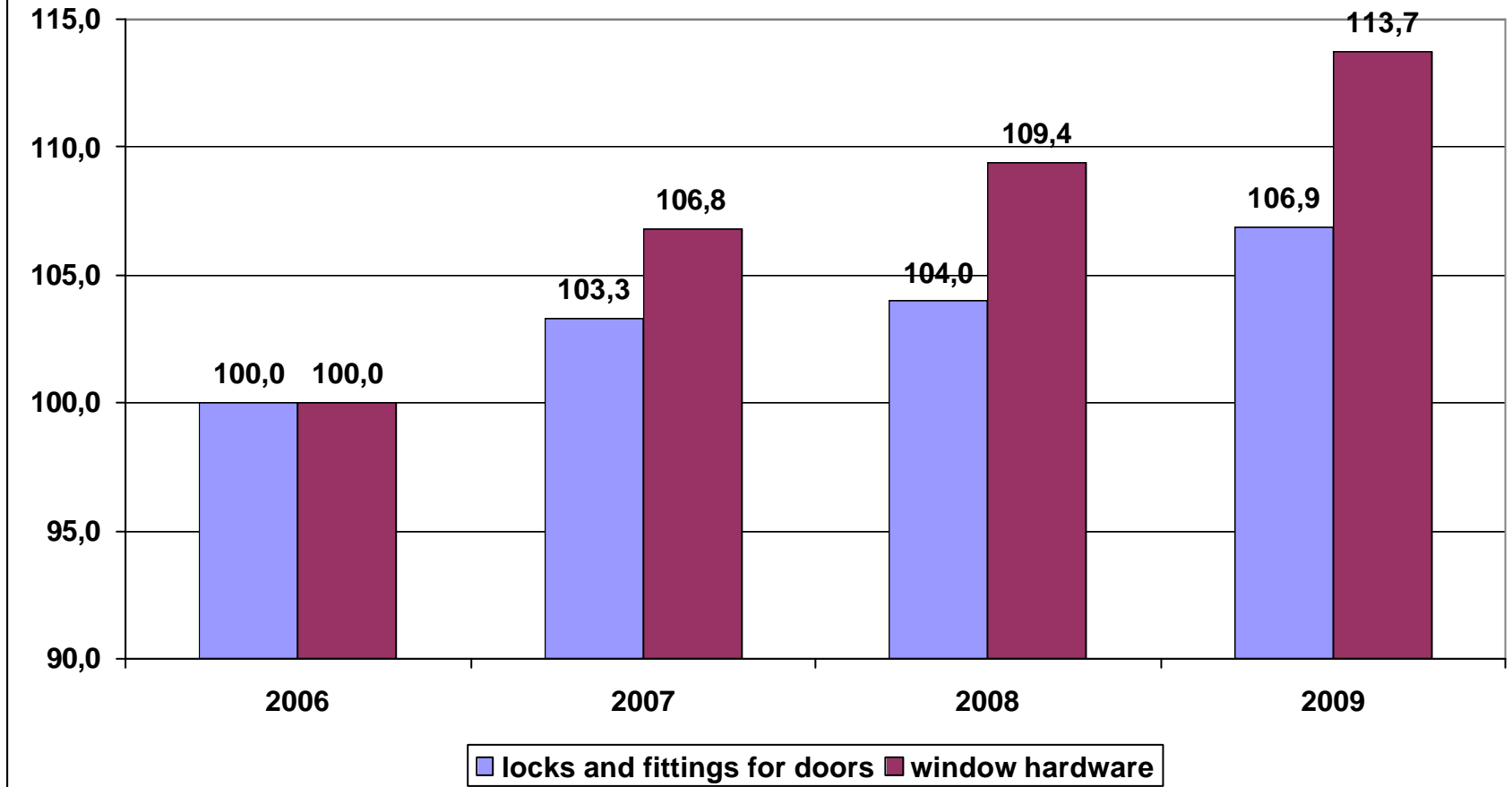
	number of manufacturers	ARGE members
Belgium	2	2
Czech. Rep.	19	6
Denmark	12	2
France	75	50
Germany	105	55
Hungary	7	7
Netherlands	8	6
	<hr/> 228	<hr/> 128

ARGE represents half of the number of manufacturers

but if we look at the value of the turnover:

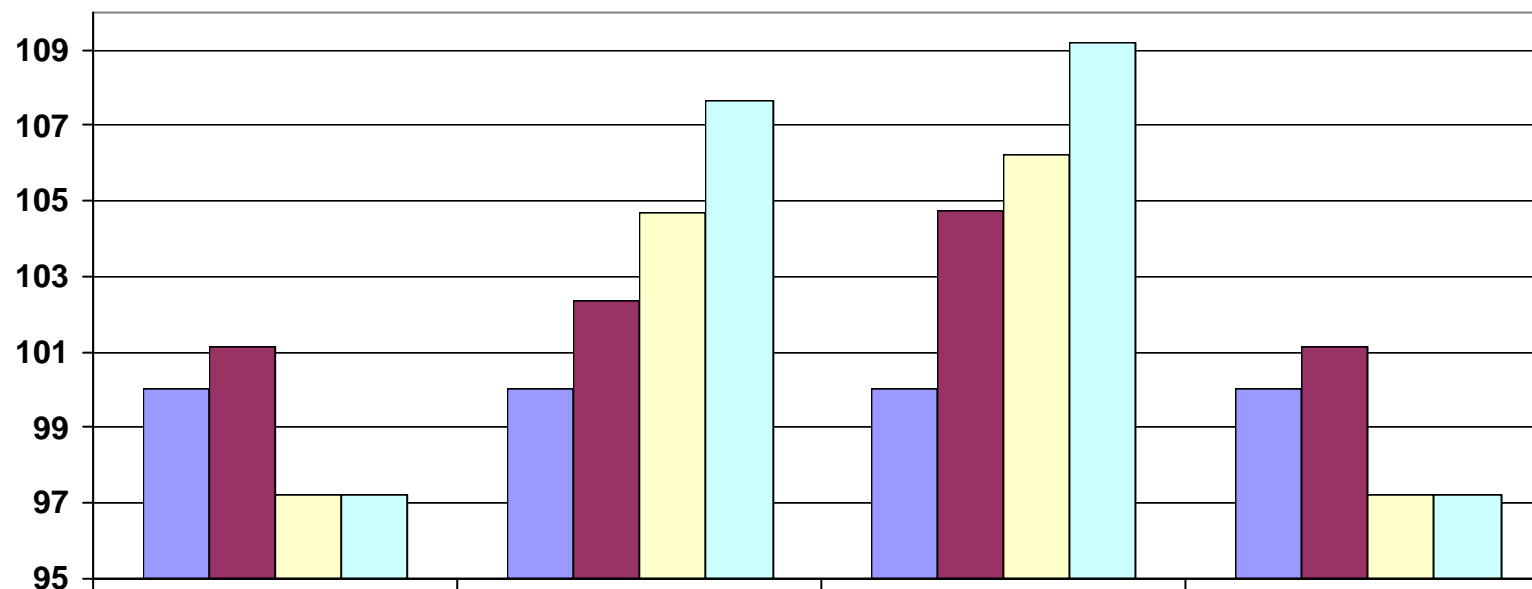
ARGE represents nearly 80 % of the building hardware industry

locks and fittings for buildings 2006 =100



Source: ARGE WG M September 2008

Locks and fittings for doors 2006 - 2009 2006 = 100



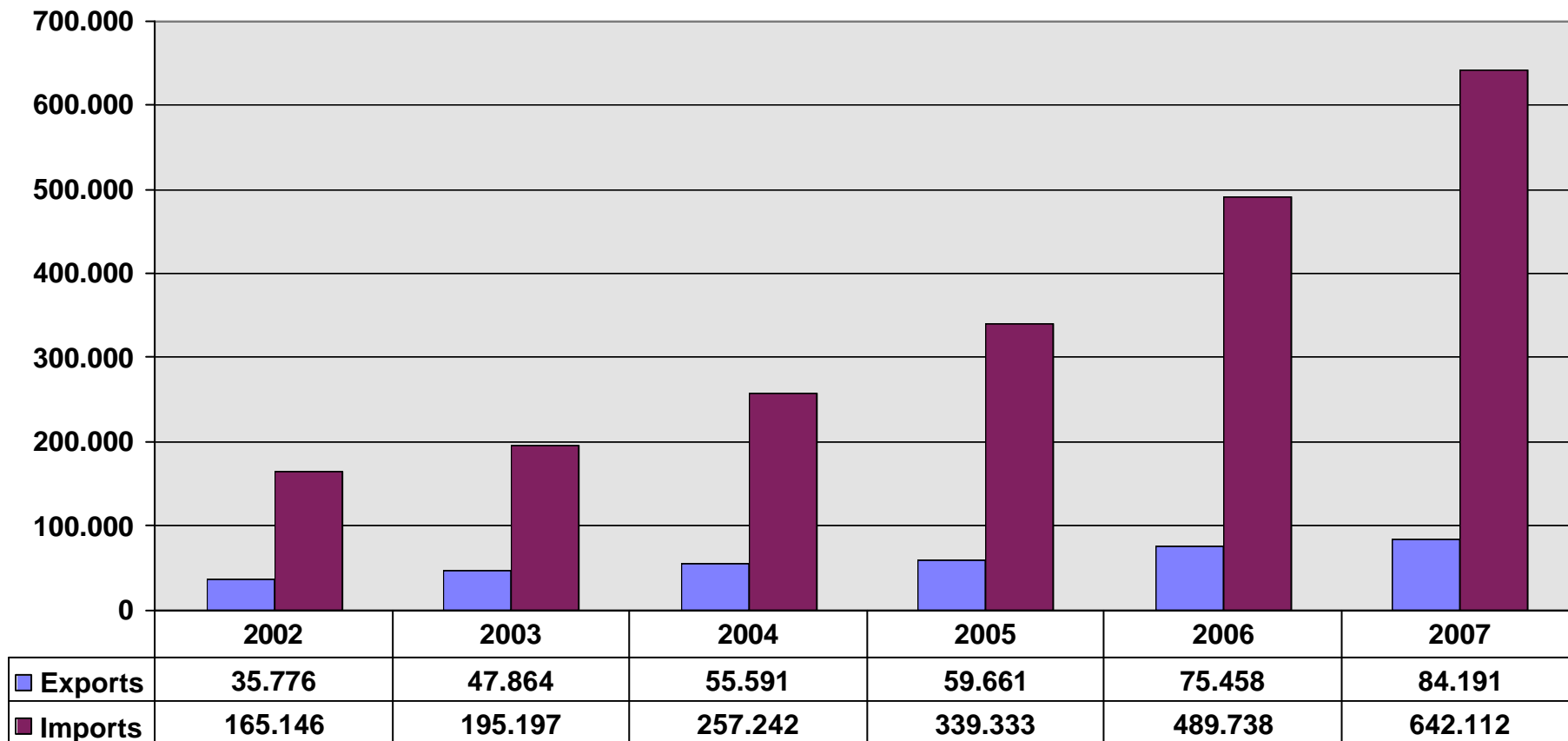
	Mortise Locks	Cylinders	Door Closers	Lever, Knob Handles, Pulls
Reihe1	100	100	100	100
Reihe2	101,1	102,4	104,7	101,1
Reihe3	97,2	104,7	106,2	97,2
Reihe4	97,2	107,7	109,2	97,2

Foreign Trade
locks and fittings for buildings

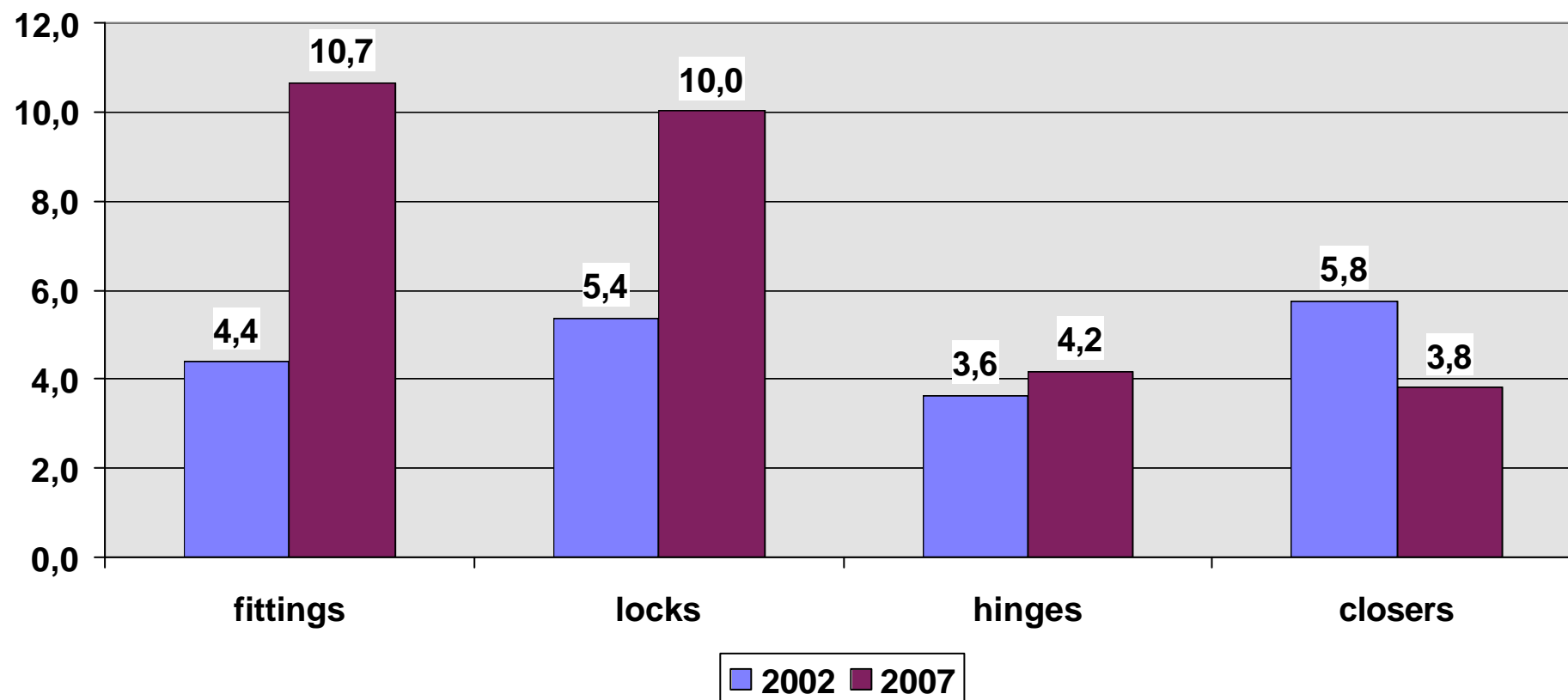


	2002	2007	2007 / 2002
<i>Export bn EURO</i>			
EC--> worldwide	4,5	6,9	53%
EC --> EC	3,4	4,9	44%
EC --> non EC	1,1	2,0	81%
<i>Import bn EURO</i>			
worldwide --> EC	3,7	6,4	73%
EC --> EC	3,1	5,1	65%
non EC --> EC	0,6	1,3	117%

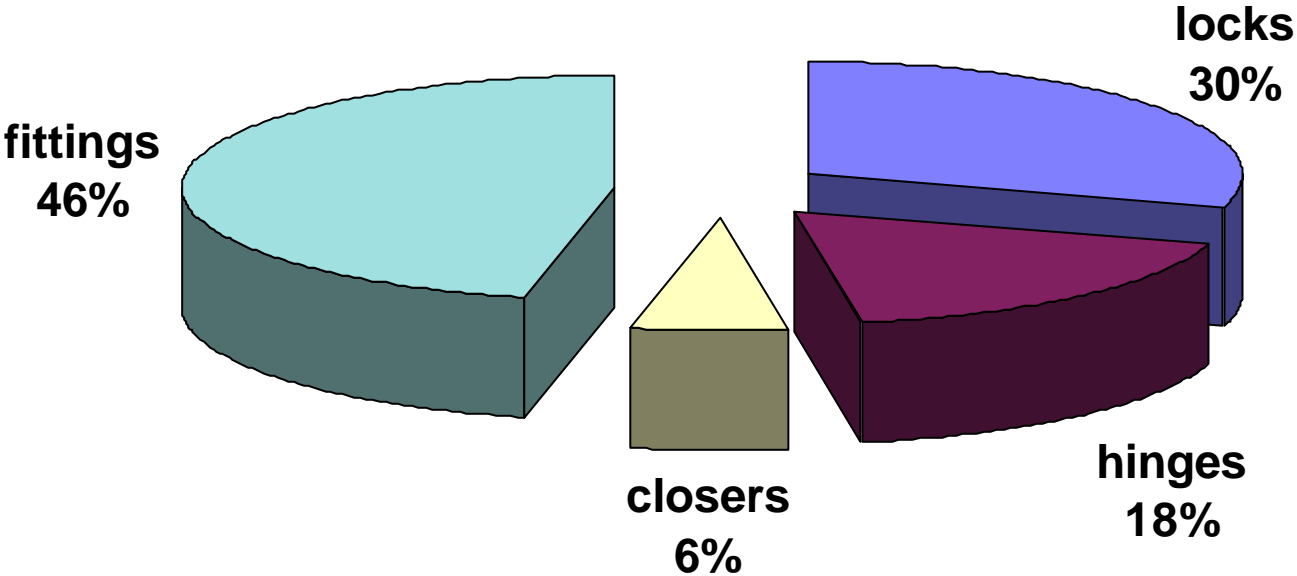
Foreign Trade EC -- China locks and fittings for buildings 1000 EURO



Relation Import / Export China - EU



**Imports China --> EU
locks and fittings
shares 2007**





European Construction Markets

to differentiate:

- residential construction – new -
- residential construction – Renovation –

- non residential construction – new –
- non residential construction – Renovation –

the construction markets follow different developments



residential construction – new -

2008: 8 growing countries (855.000 flats or 37,5% market share)
11 decreasing countries (1,4 mill. flats or 62,5 % market share)

result: decreasing European market -14,2 %

2009: 4 growing countries (191.000 flats or 9% market share)
15 decreasing countries (1,9 mill. flats or 91% market share)

result: decreasing European market -7,2 %



residential construction – Renovation -

2008: 15 growing countries (184 bn. Euro or 58% market share)
4 decreasing countries (134 bn. Euro or 42 % market share)

result: moderate growing European market 0,4 %

2009: 18 growing countries (322 bn. Euro or 84% market share)
1 decreasing country (51 bn. Euro or 16 % market share)

result: growing European market 1,2 %



non residential construction – new -

2008: 15 growing countries (176 bn. Euro or 66% market share)
4 decreasing countries (92 bn. Euro or 34 % market share)

result: growing European market 2,5 %

2009: 11 growing countries (122 bn. Euro or 46% market share)
8 decreasing countries (147 bn. Euro or 54% market share)

result: stagnating European market



non residential construction – Renovation -

2008: 16 growing and 3 stagnating countries (183 bn. Euro)

result: growing European market 1,6 %

2009: 16 growing and 1 stagnating countries
(150 bn. Euro or 81% market share)

2 decreasing countries (36 bn. Euro or 19% market share)

result: growing European market 1,4 %



European Construction Markets:

- residential construction – new : decreasing in 2008 and 2009
- residential construction – renovation : stagnation in 2008 and moderate growth in 2009
- non residential construction: growth in 2008 but stagnation in 2009
- crisis in Western and Southern Europe -- Boom in Eastern Europe