ARGE 2014 Conference
4 - 5 September 2014
Abano Terme
## Content

1. ARGE Questionnaire 2014
2. Results ARGE Questionnaire/discussion

A handout will be published on the ARGE website

[www.arge.org](http://www.arge.org)
In 2012 we started with a new questionnaire in a way that should make it possible to compare the result more easily over the forthcoming years and especially to be able to show trends in developments within our industry.

The 2014 questionnaire therefore was basically the same as the one in 2012 and 2013.

The numbers shown are the answers given in 2012 (years 2010 & 2011), the answers given in 2013 (year 2012) and the updated answers from this year (years 2013, 2014 and 2015).
Results

• Number of Answers: **36 (from 9 countries)**
• No answer from: **Belgium, Denmark, Finland, Poland and Sweden**
• A copy of the results will be made available to the national associations
Working Group M – Economic Development & International Trade: Questionnaire

Number of employees

- ≤ 50 employees:
  - 2012: 2
  - 2013: 4
  - 2014: 8

- >50 ≤ 200 employees:
  - 2012: 4
  - 2013: 12
  - 2014: 16

- >200 employees:
  - 2012: 6
  - 2013: 14
  - 2014: 18
Working Group M – Economic Development & International Trade: Questionnaire

Production

- dom.
- low cost
- both
- no prod.

Year comparison: 2012, 2013, 2014
The European Federation of Associations of Lock and Builders Hardware Manufacturers

Working Group M – Economic Development & International Trade: Questionnaire

Producttype

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>mechanical</td>
<td>27</td>
<td>32</td>
<td>35</td>
</tr>
<tr>
<td>mechatronic</td>
<td>14</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>service</td>
<td>9</td>
<td>11</td>
<td>13</td>
</tr>
</tbody>
</table>

Legend:
- 2012
- 2013
- 2014
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Working Group M – Economic Development & International Trade: Questionnaire

Mechanical product share

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth</th>
<th>No Change</th>
<th>Decline</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>10</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>2011</td>
<td>13</td>
<td>16</td>
<td>1</td>
</tr>
<tr>
<td>2012</td>
<td>12</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>2013</td>
<td>13</td>
<td>12</td>
<td>0</td>
</tr>
<tr>
<td>2014</td>
<td>21</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>2015</td>
<td>22</td>
<td>9</td>
<td>0</td>
</tr>
</tbody>
</table>
The European Federation of Associations of Lock and Builders Hardware Manufacturers

## Working Group M – Economic Development & International Trade: Questionnaire

### Mechatronic/electronic product share

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth</th>
<th>No Change</th>
<th>Decline</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>10</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2011</td>
<td>15</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2012</td>
<td>8</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>2013</td>
<td>11</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>2014</td>
<td>14</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2015</td>
<td>17</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
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Profit

- Blue: Decline
- Red: No change
- Yellow: Growth


- 2010: 15, 10, 5
- 2011: 13, 10, 7
- 2012: 15, 6, 6
- 2013: 15, 7, 7
- 2014: 20, 11, 4
- 2015: 23, 9, 1
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Import

- Decline
- No change
- Growth
- N.a.

Source: The European Federation of Associations of Lock and Builders Hardware Manufacturers
The European Federation of Associations of Lock and Builders Hardware Manufacturers

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Investments

- Blue line: decline
- Red line: no change
- Green line: growth


Data points:
- 2010: Decline (3), No Change (14), Growth (12)
- 2011: Decline (3), No Change (13), Growth (13)
- 2012: Decline (10), No Change (13), Growth (14)
- 2013: Decline (8), No Change (15), Growth (14)
- 2014: Decline (6), No Change (14), Growth (20)
- 2015: Decline (0), No Change (12), Growth (21)
The European Federation of Associations of
Lock and Builders Hardware Manufacturers

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Personnel

- Blue line: decline
- Red line: no change
- Green line: growth


Personnel changes:
- 2010: 5
- 2011: 5
- 2012: 5
- 2013: 7
- 2014: 4
- 2015: 3

Legend:
- ▲: 5
- □: 20
- △: 13
- ◆: 12
- ▽: 10
- ▽: 12
- ▲: 17
- □: 16
- △: 15
- ◆: 14
- ▽: 14
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Competition

- Decline
- No change
- Growth

2010 2011 2012 2013 2014 2015

- 2010: Decline 2
- 2011: No change 1
- 2012: Decline 2
- 2013: Decline 2
- 2014: Decline 2
- 2015: Decline 1

17
Direct sales

- Decline
- No change
- Growth
- n.a.
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Internet sales

- Blue line: decline
- Red line: no change
- Green line: growth
- Purple line: n.a.

2010: 5
2011: 0
2012: 0
2013: 0
2014: 0
2015: 0

Decline
No change
Growth
N.a.
The value of products made in the EU
Corporate social responsibility
Green products
The use of social media in marketing
The impact of the enforcement of the CPR