

EFCEM

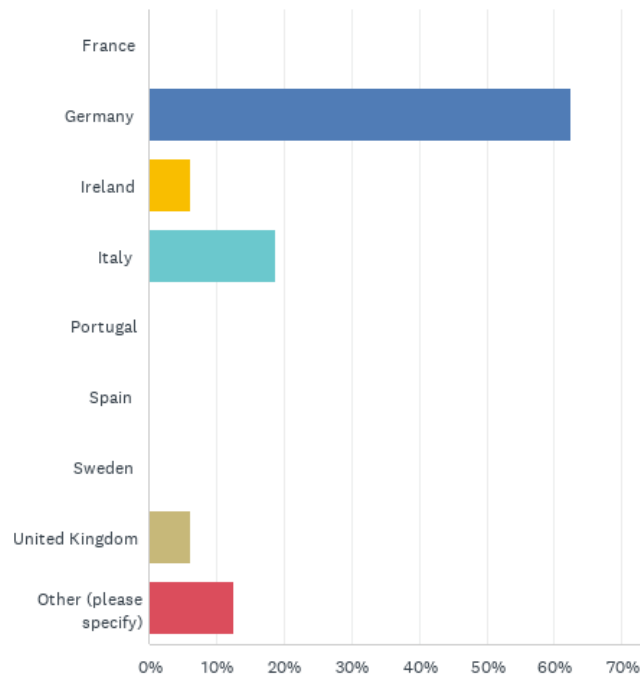
European Federation of
Catering Equipment Manufacturers

Industry Survey Results 2022

EFCEM Industry Survey: 16 respondents

Answered: 16 Skipped: 0

- **Germany**
- **Ireland**
- **Italy**
- **United Kingdom**
- **Switzerland**



Who took part?

Answered: 16 Skipped: 0

ANSWER CHOICES	RESPONSES	
Manufacturer	68.75%	11
A distributor of products manufactured outside of your country of operation	18.75%	3
An equipment reseller / dealer	12.50%	2
A service company	25.00%	4
Trade Association or Representative Body	6.25%	1
Other (please specify) (Designers and Installers)	18.75%	3
Total Respondents: 16		

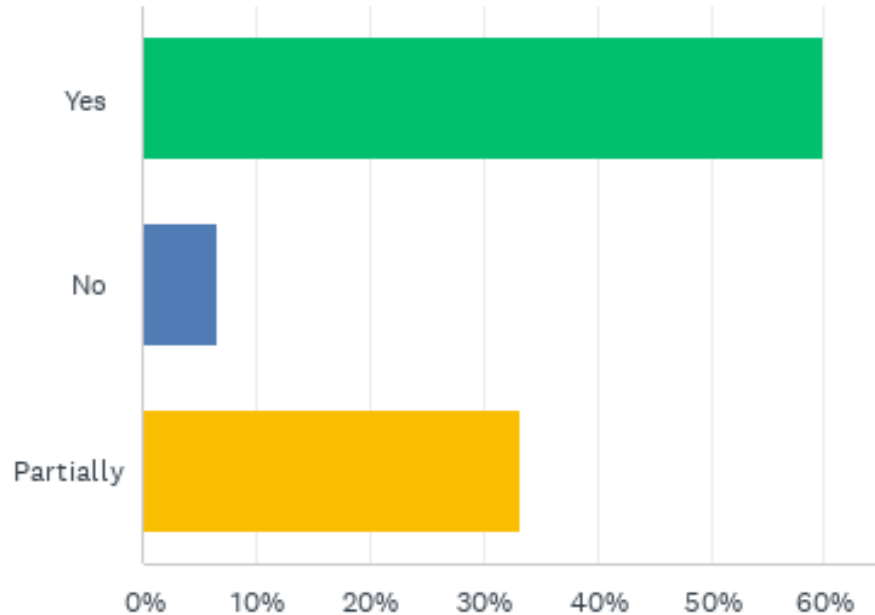
EFCEM

European Federation of
Catering Equipment Manufacturers

Market analysis

Have all restrictions now been lifted, has HoReCa re-opened?

Answered: 15 Skipped: 1

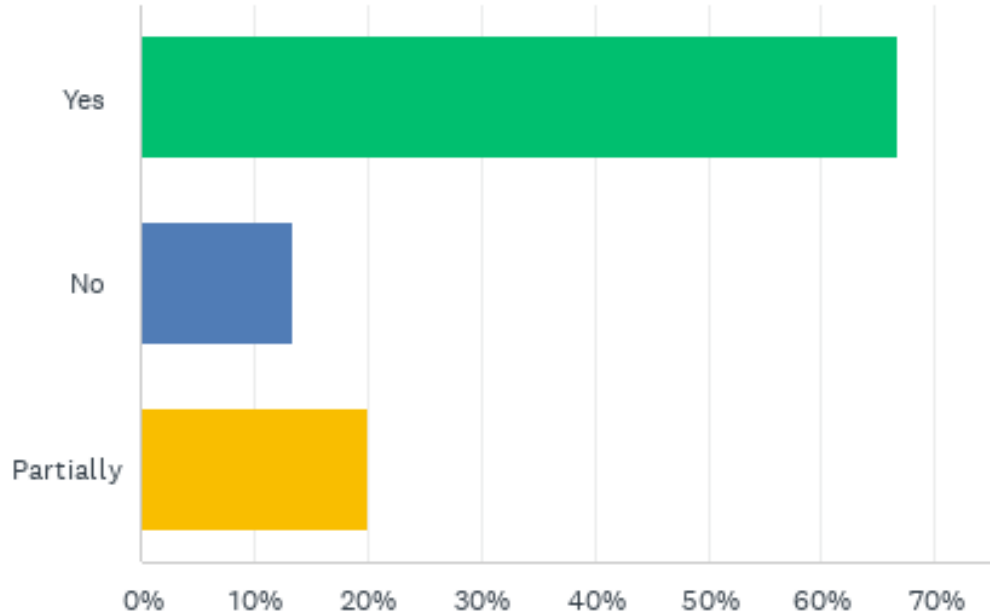


RESPONSES		
Yes	60.00%	9
No	6.67%	1
Partially	33.33%	5
		15

- It looks positive for the majority.
- “Yes” is made up of Italy, UK, Germany, and Switzerland.
- ‘Partially’ is made up of respondents from Germany and Ireland.

Have international travel restrictions been lifted?

Answered: 15 Skipped: 1

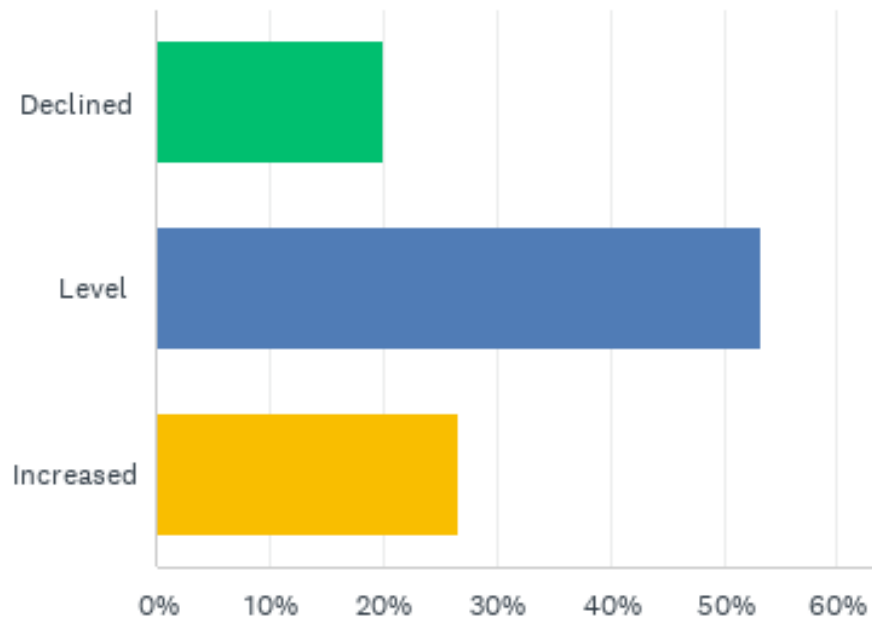


RESPONSES		
Yes	66.67%	10
No	13.33%	2
Partially	20.00%	3
		15

- The results here echo that of the previous slide. And largely align to the re-opening of HoReCa.
- Travel has opened up as the market opened up.

How do your current level of sales compare to the previous six months?

Answered: 15 Skipped: 1



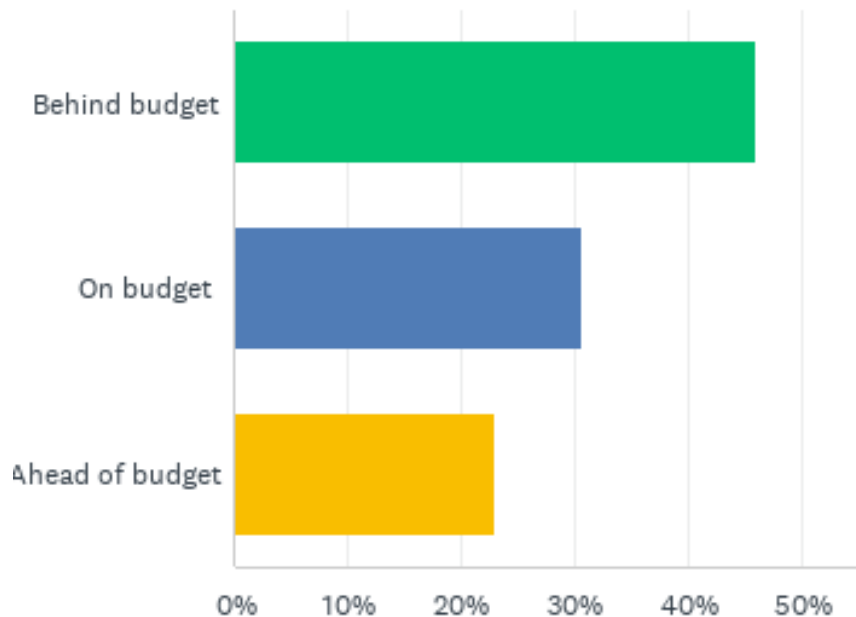
- There is still some distance to go until the market picks up. Whilst 'Level' may feel positive the previous six months were also tough.

RESPONSES

20.00%	3
53.33%	8
26.67%	4
	15

What are your forecast sales for the next six months?

Answered: 13 Skipped: 3

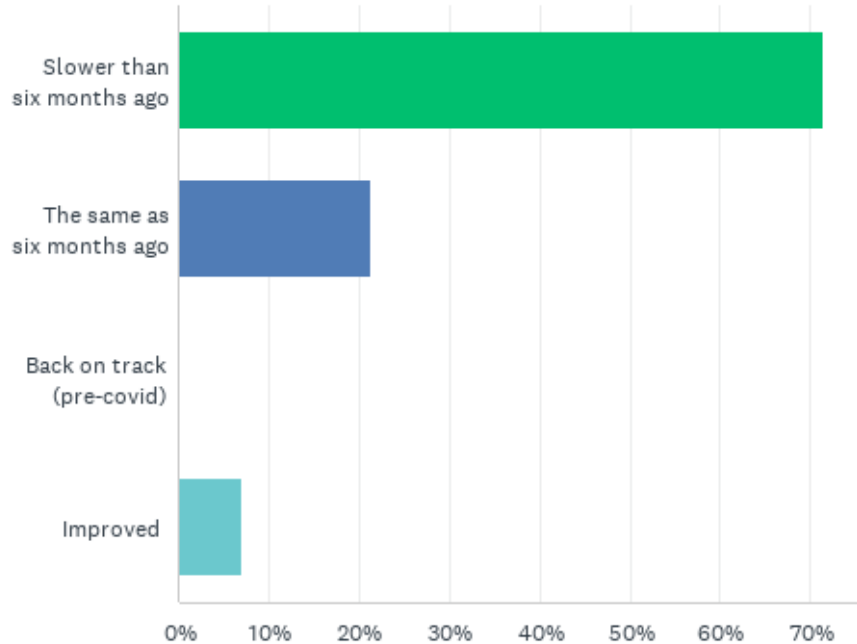


- The sales forecasts for the next six months are a reflection on the results of the previous slide with the majority projecting to still be behind budget.

RESPONSES	
46.15%	6
30.77%	4
23.08%	3
	13

What are your supply chain delivery times compared to six months ago?

Answered: 14 Skipped: 2



- Delivery times are a major issues for the majority.

RESPONSES

71.43% 10

21.43% 3

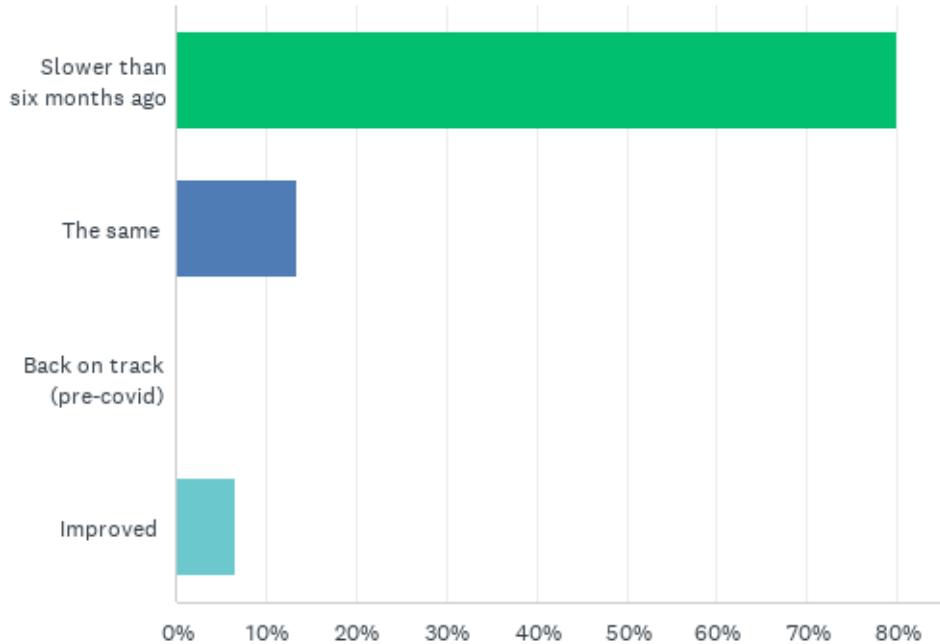
0.00% 0

7.14% 1

14

How do you expect supply chain delivery times to be operating in six months?

Answered: 15 Skipped: 1

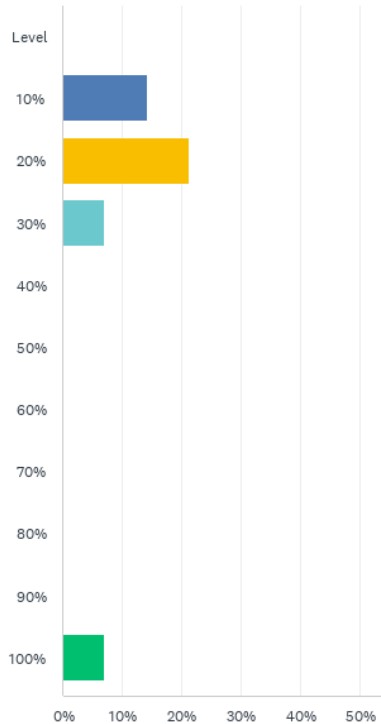


- It's felt that things will get worse before they get better.

RESPONSES	
80.00%	12
13.33%	2
0.00%	0
6.67%	1
15	

Have you experienced an increase in supplied goods prices over past six months? If so by how much?

Answered: 14 Skipped: 2



ANSWER CHOICES	RESPONSES	
Level	0.00%	0
10%	14.29%	2
20%	21.43%	3
30%	7.14%	1
40%	0.00%	0
50%	0.00%	0
60%	0.00%	0
70%	0.00%	0
80%	0.00%	0
90%	0.00%	0
100%	7.14%	1

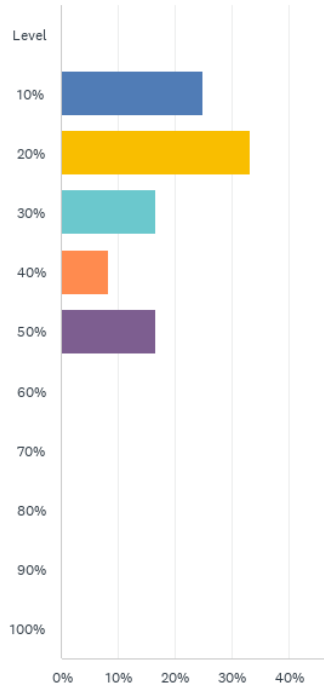
- Increases have been felt by everyone

Which goods have had exceptional rises?

- Stainless steel +80%, Electronic components +30%, Other supplied goods +80% all referred to 2019
- 40% is the average, all shipment cost and metallic product have higher increase
- All stainless steel products and electronics

Have you experienced an increase in either transport or delivery costs over the past six months? If so by how much?

Answered: 12 Skipped: 4

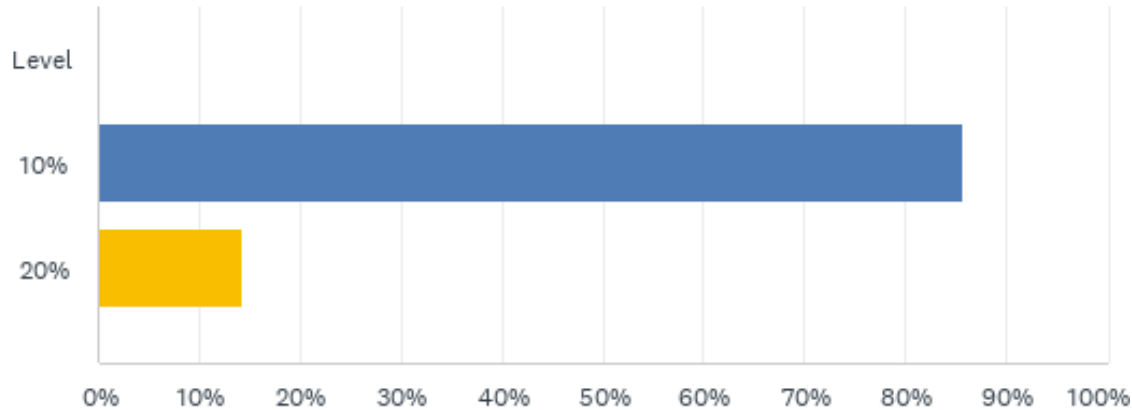


ANSWER CHOICES	RESPONSES	
Level	0.00%	0
10%	25.00%	3
20%	33.33%	4
30%	16.67%	2
40%	8.33%	1
50%	16.67%	2
60%	0.00%	0
70%	0.00%	0
80%	0.00%	0
90%	0.00%	0
100%	0.00%	0
TOTAL		12

- The market doesn't offer any respite. Supply chain delivery times have gotten worse and what's more distributors have also increased their delivery costs.

Have you increased selling prices because of input prices in the last six months? If so by how much?

Answered: 14 Skipped: 2

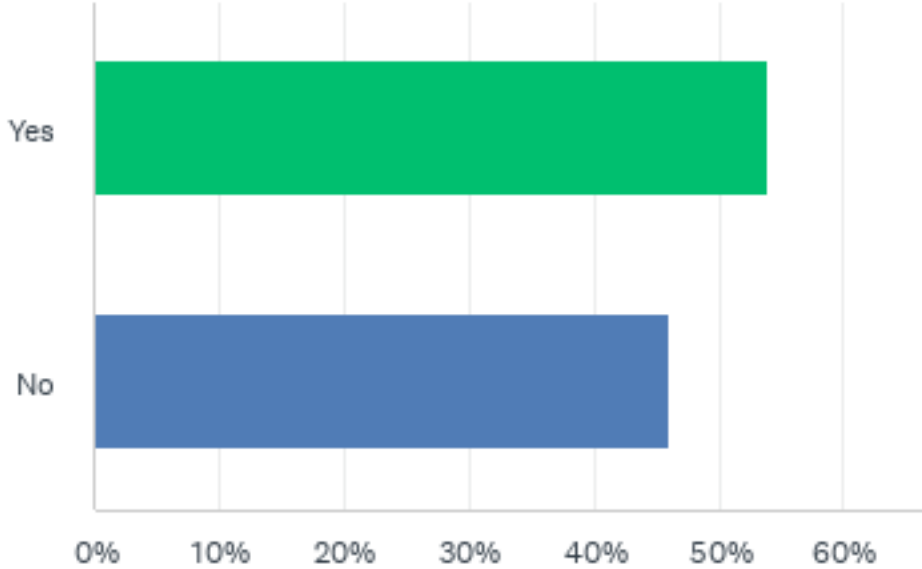


- Majority of respondents have increased selling prices by 10%
- Costs have been passed on to the consumer

ANSWER CHOICES	RESPONSES	
Level	0.00%	0
10%	85.71%	12
20%	14.29%	2

Are you experiencing difficulties in finding staff?

Answered: 13 Skipped: 3



- Staff issues are fairly evenly split

RESPONSES	
53.85%	7
46.15%	6
13	

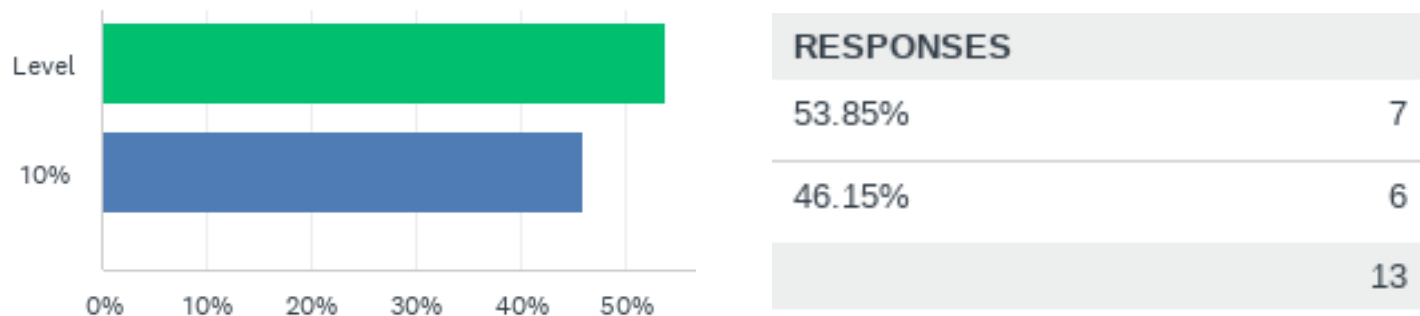
EFCEM

European Federation of
Catering Equipment Manufacturers

Market fluctuations due to
the Russia Ukraine conflict

Have you increased average employee wages to either retain or employ new staff members in the last six months? If so by how much?

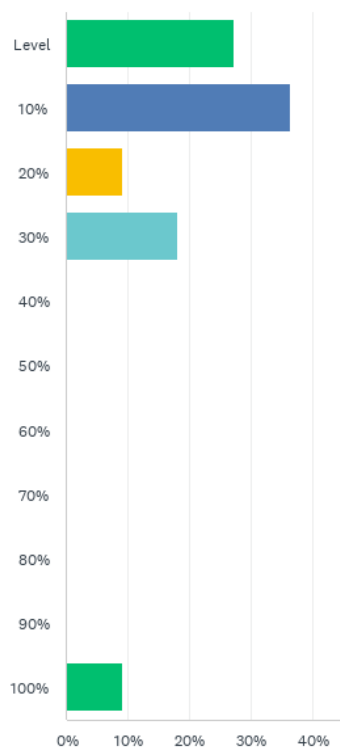
Answered: 13 Skipped: 3



- Interestingly, the split here is exactly the same as the previous slide.
- To draw upon any correlation, it could well mean that those companies that have increased employee wages have found it easier to retain and / or find staff.

Have you received increased prices in transport since the commencement of the Invasion of Ukraine? If so by how much?

Answered: 11 Skipped: 5

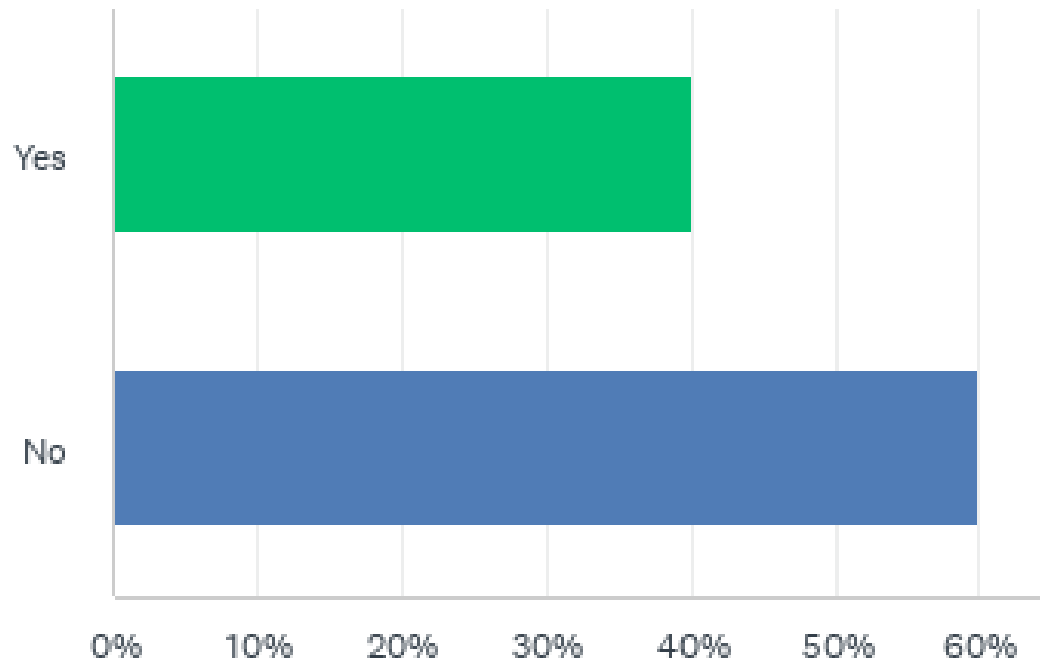


ANSWER CHOICES	RESPONSES
Level	27.27% 3
10%	36.36% 4
20%	9.09% 1
30%	18.18% 2
40%	0.00% 0
50%	0.00% 0
60%	0.00% 0
70%	0.00% 0
80%	0.00% 0
90%	0.00% 0
100%	9.09% 1
TOTAL	11

- Majority of respondents have experienced an increase in transportation costs since the start of the conflict.
- Notably, one respondent has seen a 100% increase in cost.

Are the goods you supply to Russia and/or Belarus subject to embargo?

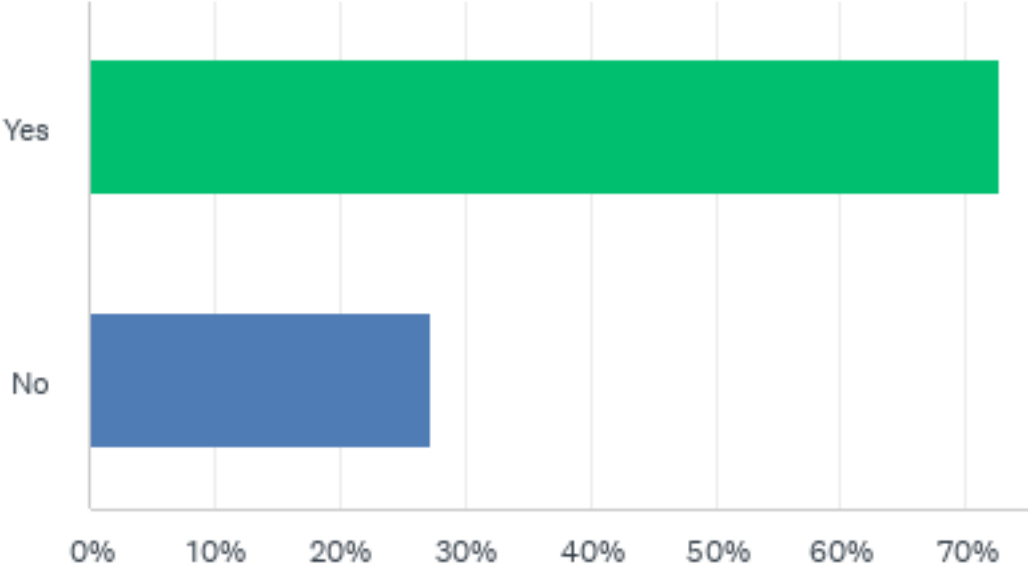
Answered: 10 Skipped: 6



RESPONSES	
40.00%	4
60.00%	6
	10

Does your company / association have a policy on NOT supplying to Russia and/or Belarus?

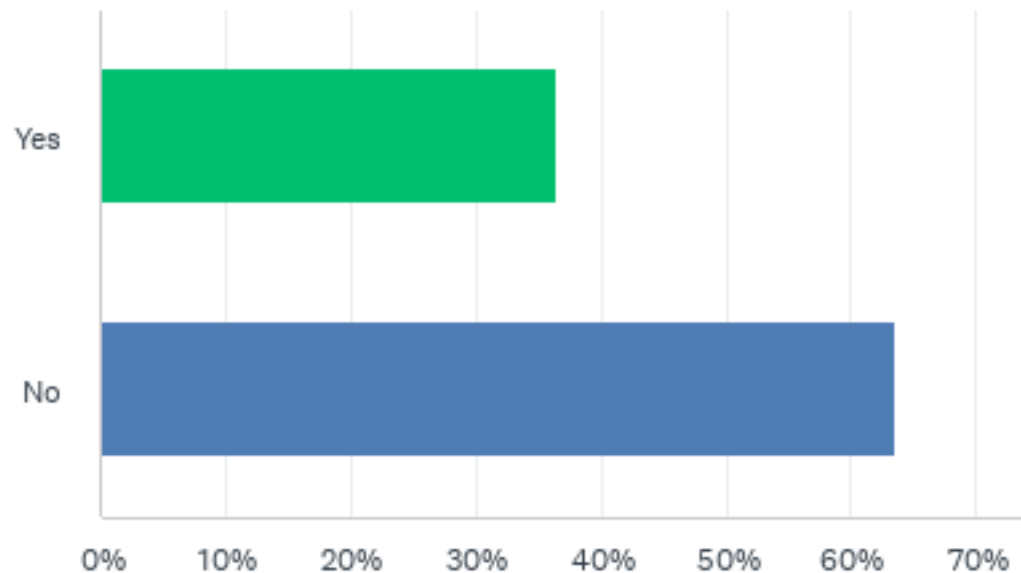
Answered: 11 Skipped: 5



RESPONSES	
72.73%	8
27.27%	3
	11

Does your national Government have legislation in place to prevent sales of catering or foodservice equipment to Russia/Belarus?

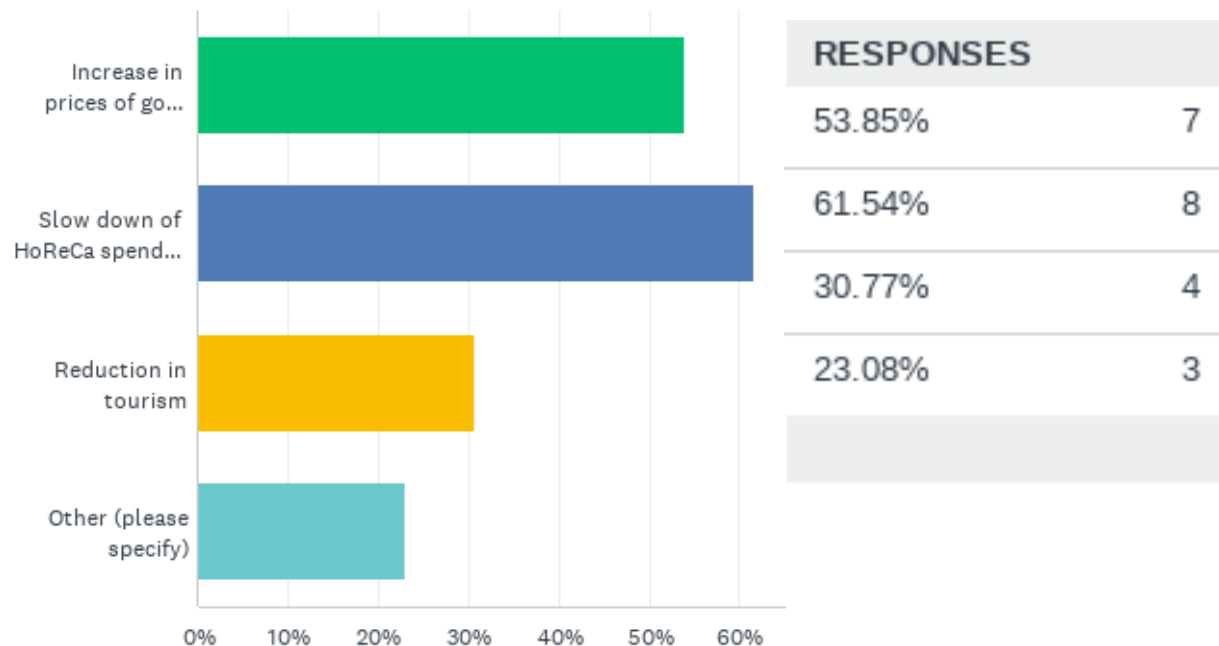
Answered: 11 Skipped: 5



RESPONSES	
36.36%	4
63.64%	7
	11

What other impacts do you anticipate will effect your business because of the invasion of Ukraine? Select all that apply.

Answered: 13 Skipped: 3



'Other' impacts

- The sector's exposure to the markets of Russia and Ukraine only amounts to 2% of turnovers measured before the start of the conflict. Overall, the war is only marginally slowing the sector's activities, with maximum declines in turnover indicated at 7%.

EFCEM

European Federation of
Catering Equipment Manufacturers

Industry Survey Results 2022