

EFESME market survey

To better understand the evolution of the EU market
in the past 12 months during and after the pandemic

May 2021 – May 2022



EFESME

**European Federation for
Elevator Small and
Medium-sized Enterprises aisbl**



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EFESME is the European Federation representing small and medium-sized enterprises in the lift industry.

Through its national members, **EFESME represents more than 3,200 small and medium-sized enterprises** working as component manufacturers and suppliers, installers and maintainers, and service providers in the European lift sector.

- **The majority of the companies represented by EFESME are installers and maintainers of lifts and platforms. The number of component manufacturers represented is present but small, and the following report should be read within this lens.**



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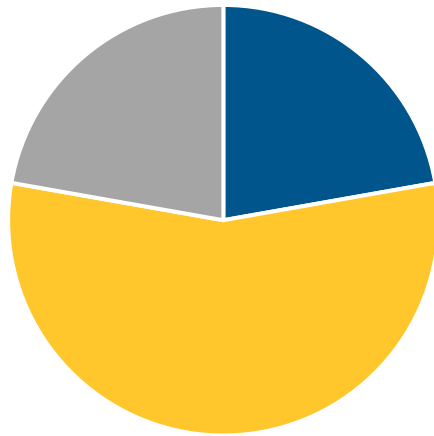
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How are your member SMEs distributed?

European lift SMEs dimension



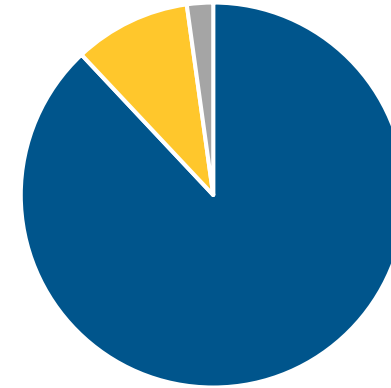
■ Micro enterprises ■ Small enterprises ■ Medium enterprises

EFESME members are national associations representing small and medium-sized enterprises in the lift sector.

A survey among the Federation's members showed that **56% of the companies they represent are small companies**, i.e.: they have < 50 employees and ≤ 10 million € annual turnover OR ≤ 10 million € annual balance sheet.

What professions are your members divided into?

Division of professions within European lift SMEs



■ Installers / maintainers ■ Components manufacturers ■ Others

Of the small and medium-sized companies represented, the vast majority are installers and maintainers of lifts and platforms, with a strong preponderance in all the countries surveyed.

Among EFESME members, component manufacturers are mainly present in the following countries:

- Bulgaria
- Italy

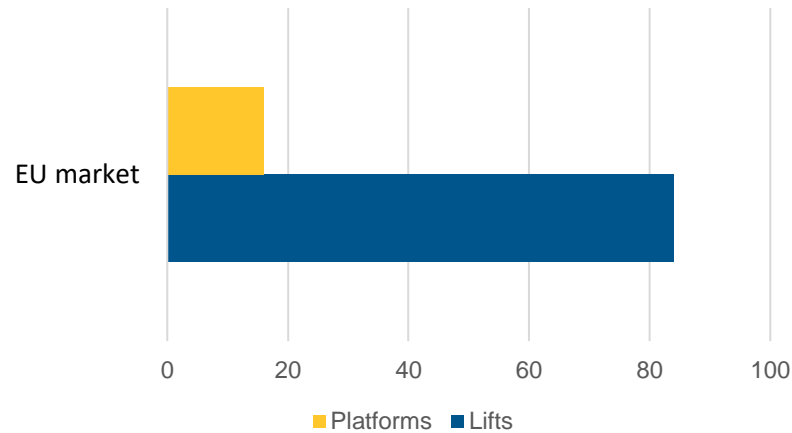


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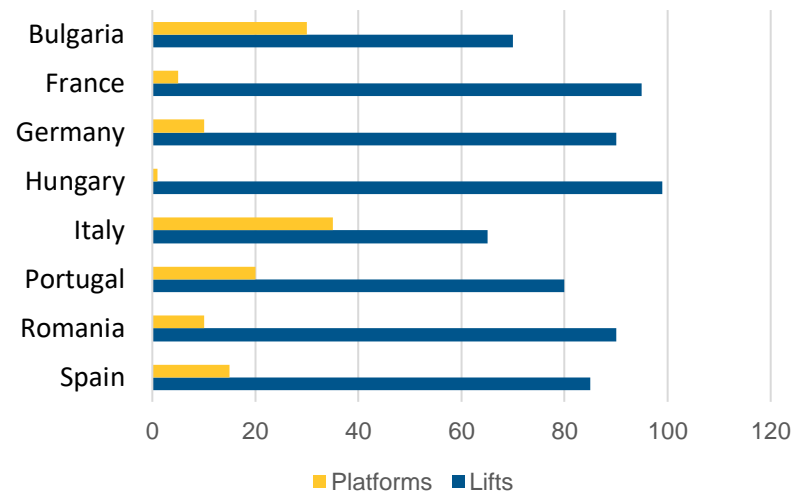
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Division of the European market by type of installation Lifts vs. platforms



As is evident from the average based on the market data received from the national associations members of EFESME, **the European market is generally more oriented towards lifts than platforms, with a ratio of 84% lifts / 16% platforms.**

Some examples at the national level from EFESME members



Here are some examples sent by some EFESME members to illustrate the orientation of their national market. The high prevalence of lift systems in all markets is evident.



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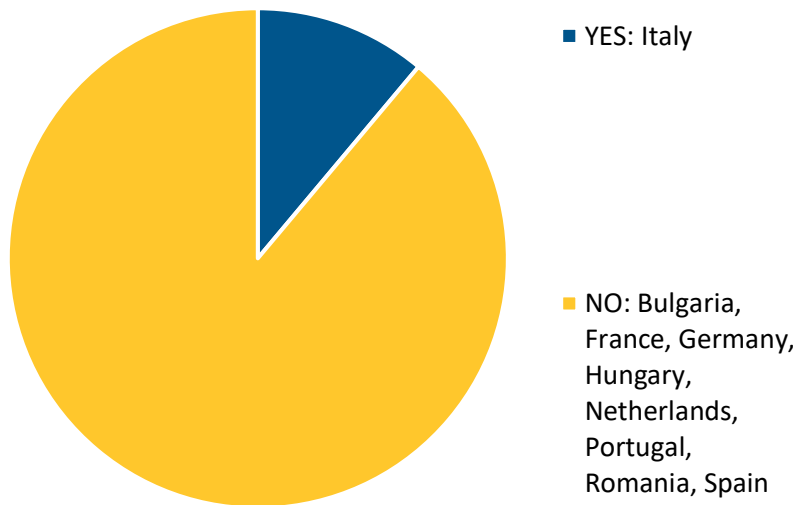
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STATE AID

During the pandemic and in this post-pandemic period, was there any state aid to encourage work on existing installations?

Presence of state aids



Only in Italy there are state aids and subsidies to help companies during the pandemic period and during the current recovery.

The Italian government, depending on the type of work to be carried out, has presented **bonuses ranging from 50% of expenditure to total coverage of the investment.**

Examples of state aids by the Italian government that had an impact on the lift sector are:

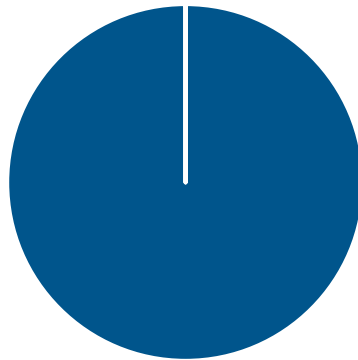
- State aids to building owners to improve the energy performance of buildings;
- State aids to improve seismic resistance of buildings;
- State aids to improve installations accessibility to remove architectural barriers;
- State aids to renovate old buildings and its installations (lifts included).
- State aids is in the form of fiscal credits that can be sold to banks.

The Italian situation is a unique example and has led to an orderly growth of more than the supply and/or the affordable, despite the shortage of raw materials and despite market speculation.

In any case, throughout Europe, the sector was recognised as necessary and was able to continue working, with due and necessary health precautions, even during the peak of the pandemic.

TRACTION SYSTEMS

Most common traction systems for lifts:

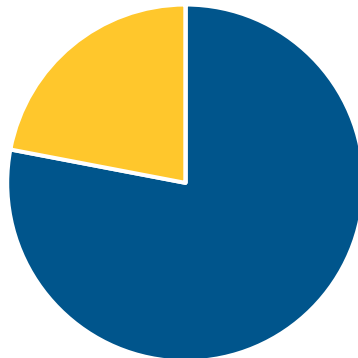


■ Electric systems ■ Hydraulic/oleodynamic systems ■ Other

All the answers received show that **electrical systems are the preferred choice for lift installations.**

- ANACAM (Italy) points out that electrical systems are preferred both for modernisation of existing installations and for new installations.

Most common traction systems for platforms:



■ Electric systems ■ Hydraulic/oleodynamic systems ■ Other (*)

(*) With regard to traction systems for lifting platforms, VmA (Germany) was the only one to report other traction systems, such as toothed belts and spindles, with the following percentages: 30% spindles / 40% toothed belts / 30% hydraulic systems.



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