

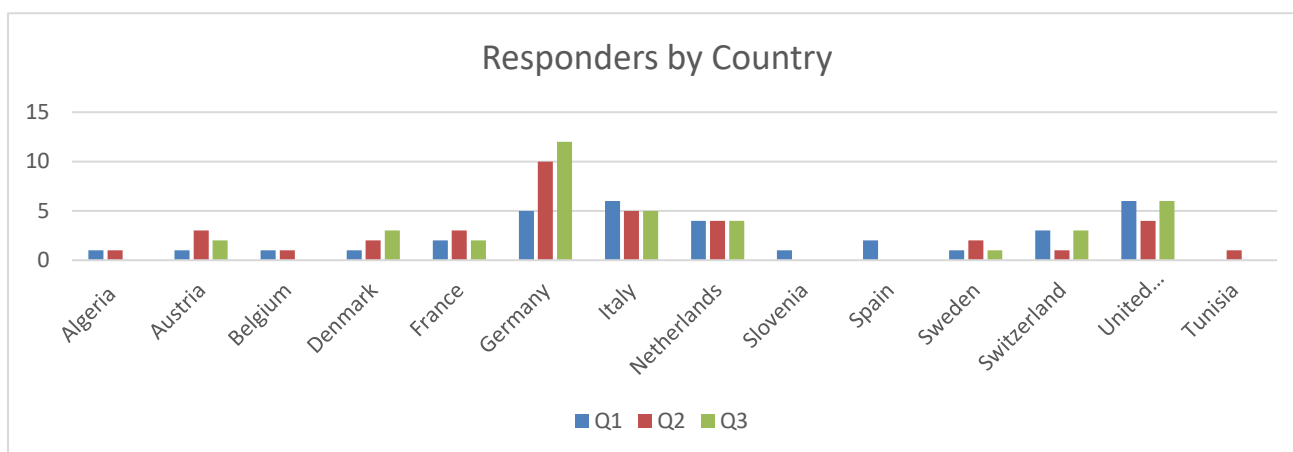


European Brushware Federation

MARKET RESEARCH EUROPEAN BRUSHWARE INDUSTRY / Q3 -2021

RESPONSE TO THE SURVEY

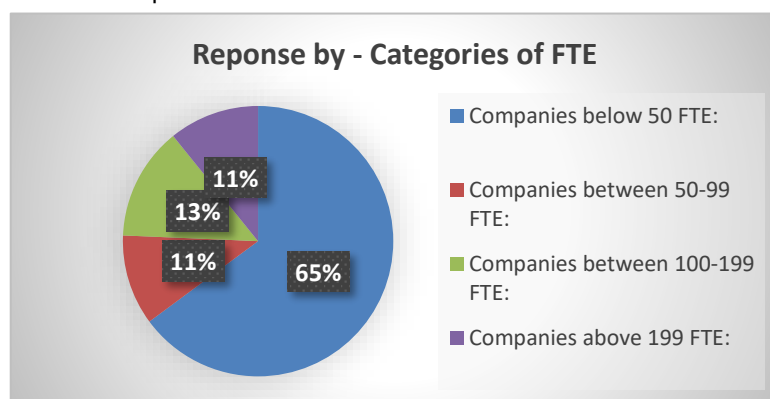
The second quarterly survey took account of a total of 292 survey invitations, addressed to the individual FEIBP membership companies. Out this initial pool of companies, 113 opened the survey enquiry e-mail and 55 opened the survey application. In total, 38 completed survey inquiries. For reference, 36 survey were completed in the first quarterly survey. In the below table a breakdown of the responders is presented, by their individual countries and in comparison to the previous survey.



The following presented question to responders was: “What is the (estimated) number of full-time employees within your company?”. We can take note of the following results, which should be considered when looking at the findings further down in the report. This does not relate to the average company size represented by the FEIBP as having 61 FTE’s. It relates to those who responded to the survey, who represent 13% of the total membership.

Company average FTE:	61
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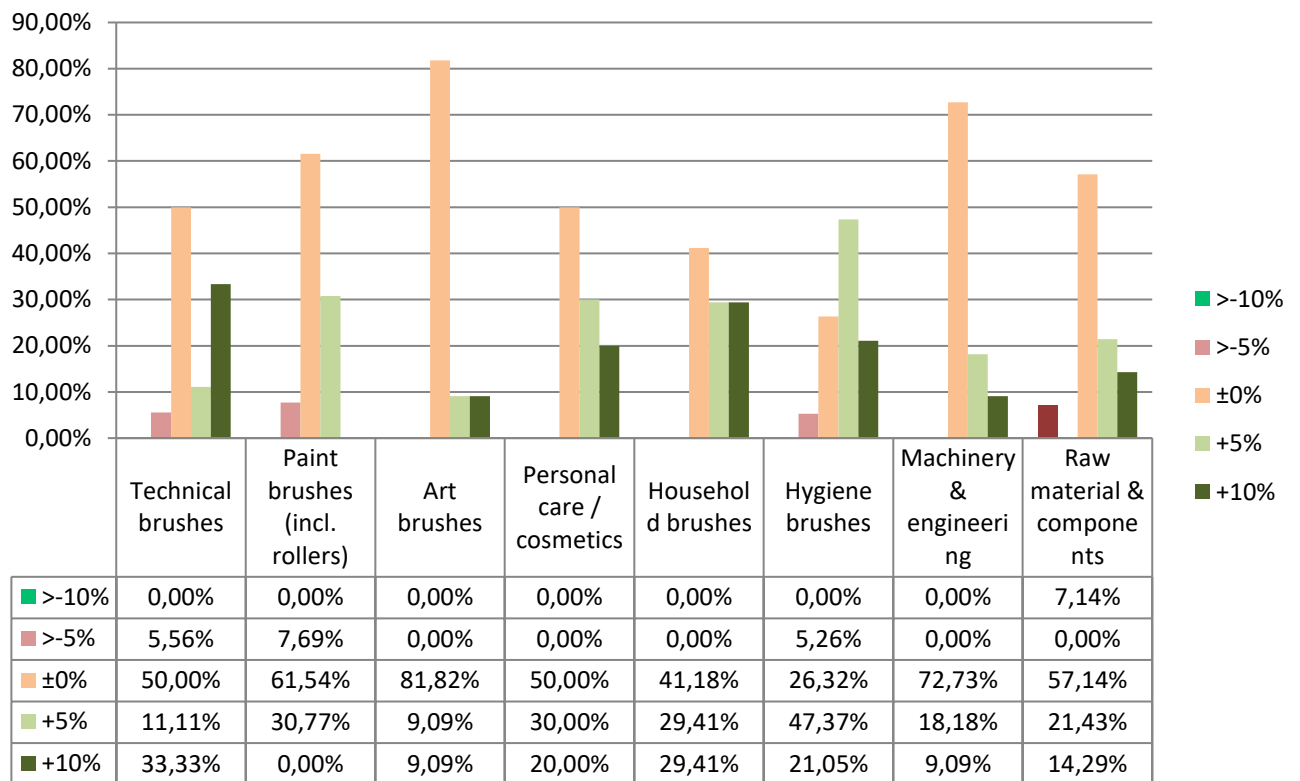
Companies below 50 FTE:	24
Companies between 50-99 FTE:	4
Companies between 100-199 FTE:	5
Companies above 199 FTE:	4



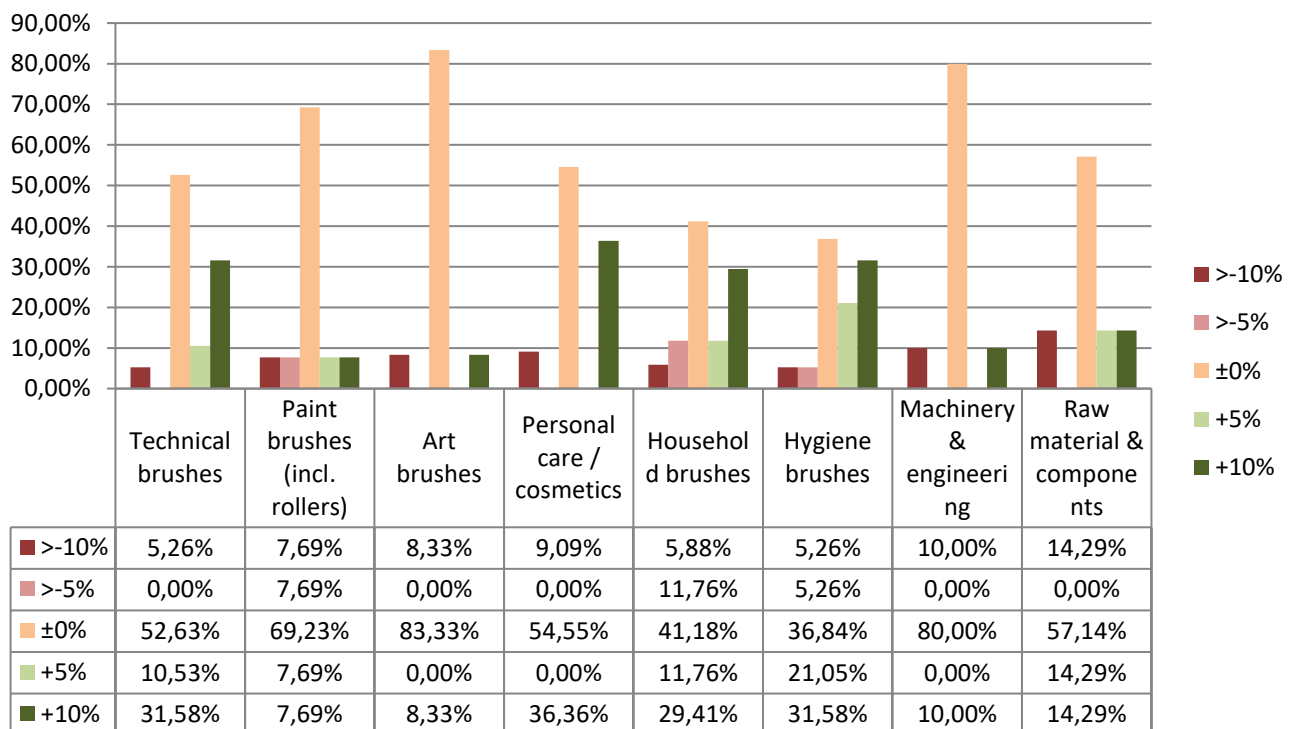
COMPARING THE HOME AND EXPORT MARKETS TO THE PREVIOUS YEAR

The following 2 graphs are dedicated to the comparison of orders received in the home market, as well as the export market, from Q3 2021 to Q3 2020, per product category. It can be noted that several categories experienced a better quarter than noted in in the previous survey. Technical brushes seem to have been doing better compared to the previous inquiry.

Home market compared tot 2020, per category



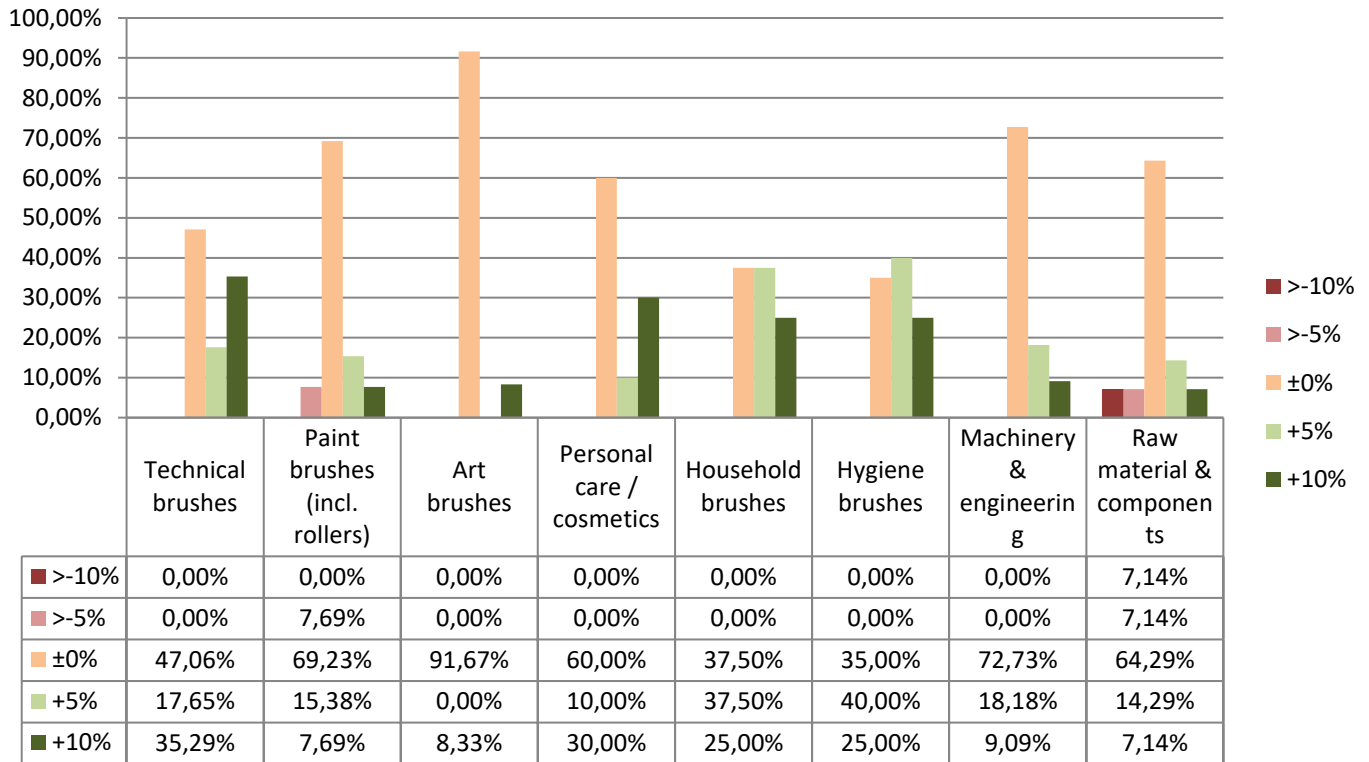
Export market compared tot 2020, per category



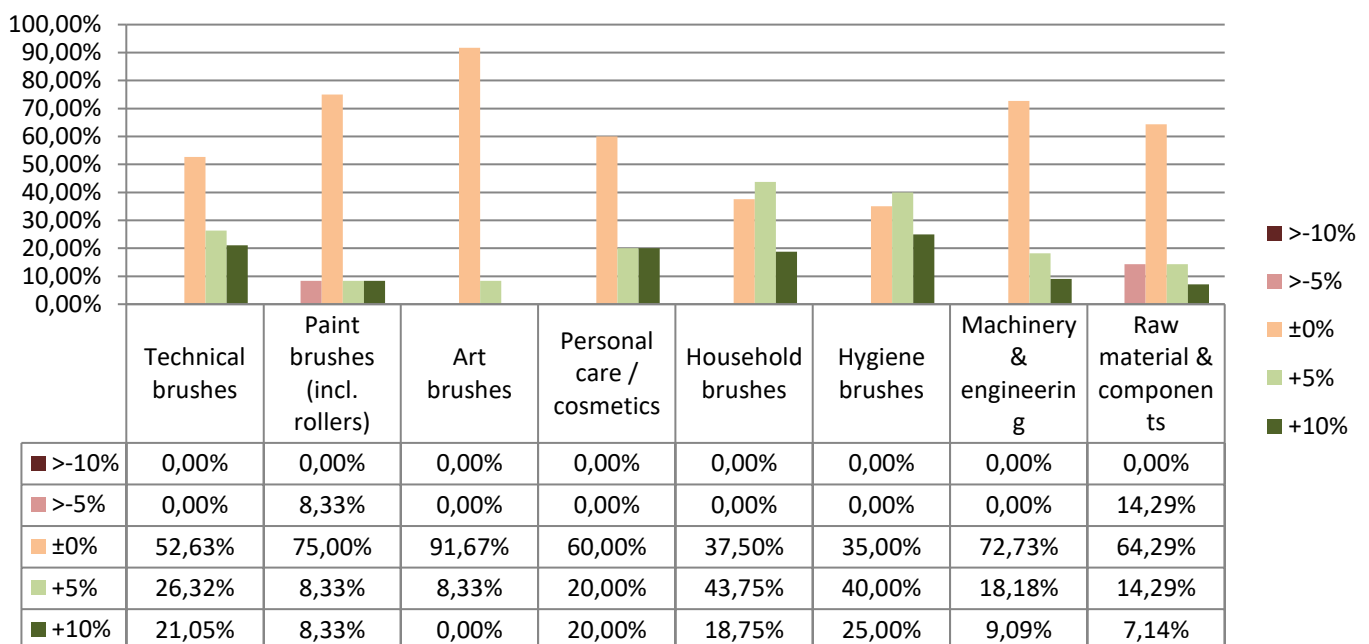
FORECASTS OF SALES

Responding companies are optimistic on the expected sales of hygiene brushes in the next quarter and following 6 months. They are less optimistic regarding the prospects of raw materials.

For the next quarter, per product category

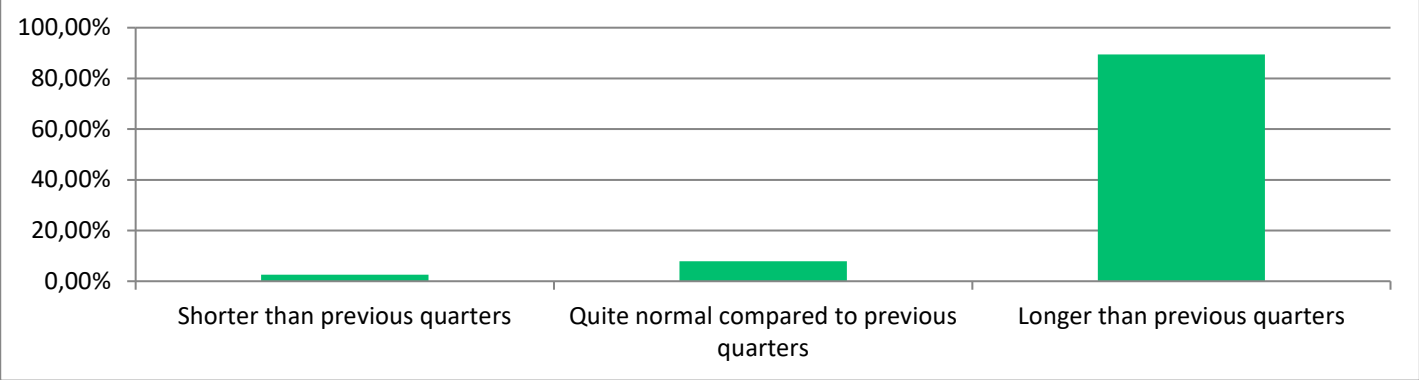


Sales forecasts, next 6 months



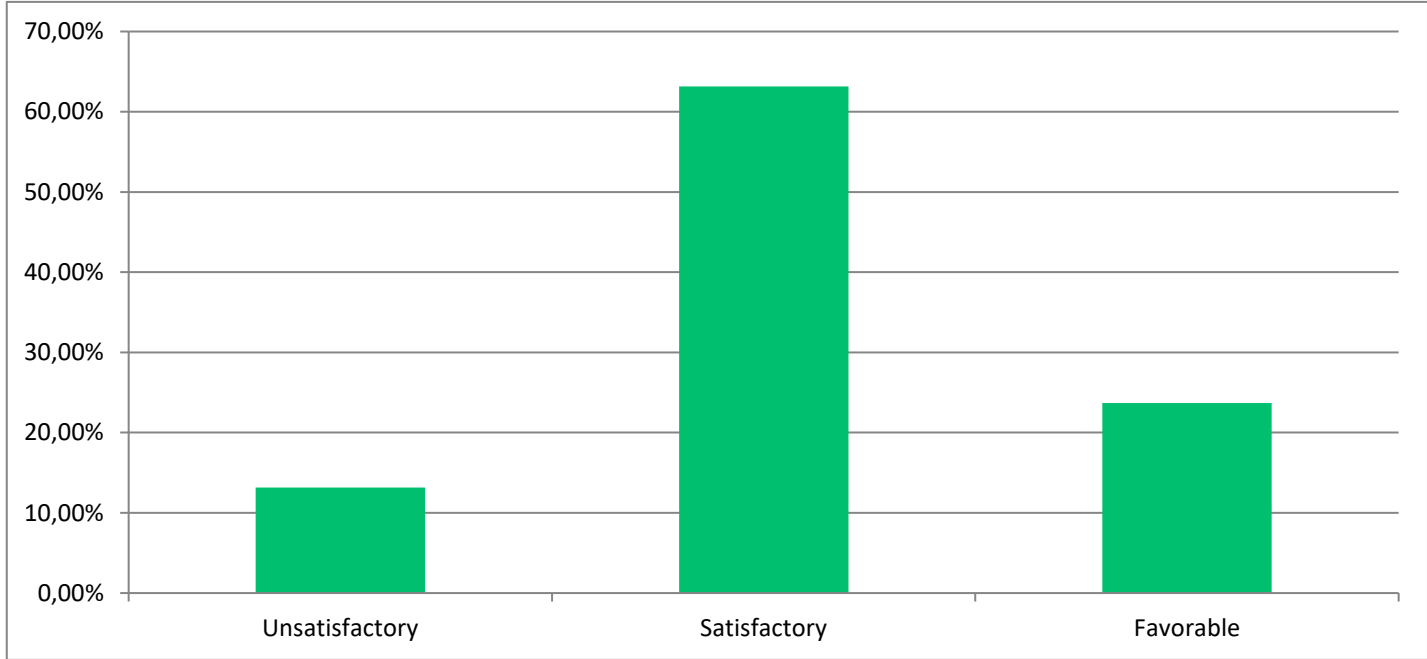
DELIVERY TIMES FROM SUPPLIERS

The following responses can be noted in regards to the Q3 2021 delivery times compared to Q2 2021.



GENERAL ECONOMIC OUTLOOK

The following can be noted in regards to the Q3 2021 economic outlook compared to Q3 2021.



OPPORTUNITIES

The following words are used to describe the opportunities of the brushware market within the coming quarter.



THREATS

The following words are used to describe the threats of the brushware market within the coming quarter.