

EUROMETAL COORDINATION MEETING OF NATIONAL FEDERATIONS

MEETING BUDAPEST 04 NOVEMBER 2016

EUROMETAL COORDINATION MEETING OF STEEL DISTRIBUTION FEDERATIONS



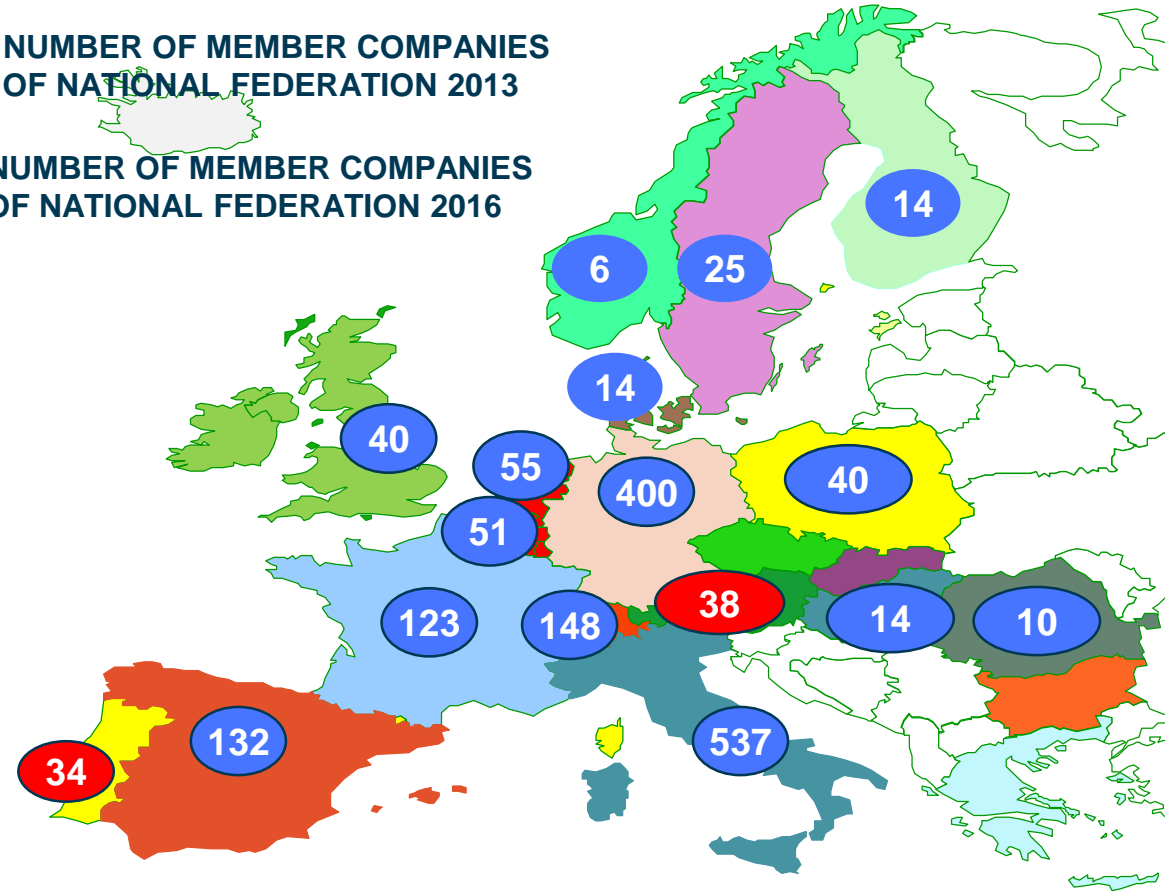
BENCHMARKING OF NATIONAL FEDERATIONS

STATUS: 06 11 2016

**19 EUROPEAN NATIONAL FEDERATIONS ARE MEMBERS OF EUROMETAL
REPRESENTING 1681 STEEL DISTRIBUTION & SSC ENTITIES**

XX = NUMBER OF MEMBER COMPANIES
OF NATIONAL FEDERATION 2013

XX = NUMBER OF MEMBER COMPANIES
OF NATIONAL FEDERATION 2016



- WORK GROUP COORDINATION OF NATIONAL MEMBER FEDERATIONS:*
- ✓ ACOMEFER, PORTUGAL
 - ✓ ARDIMET, ROMANIA
 - ✓ ARGE SMD, AUSTRIA
 - ✓ ASSOFERMET, ITALY
 - ✓ BDS/EHV, GERMANY
 - ✓ FFDM, FRANCE
 - ✓ GRYPMAFER, BELGIUM
 - ✓ MAFE, HUNGARY
 - ✓ NASS, UK
 - ✓ PUDS, POLAND
 - ✓ STAALFEDERATIE, NETHERLANDS
 - ✓ SSHV/VSIG, SWITZERLAND
 - ✓ STALFORENINGEN, DENMARK
 - ✓ STAL OCH METALL, SWEDEN
 - ✓ STALFORENINGEN, NORWAY
 - ✓ TEKNINEN KAUPPA, FINLAND
 - ✓ UAHE, SPAIN

STATUS: 06.11.2016



KEY BENCHMARKS OF NATIONAL FEDERATIONS: STAFF & MEMBER STRUCTURE

BENCHMARK	BDS	NASS	GRYM	SWE	FIN	SSHV	PUDS	ROM	MAFE	FFDM	VSEMH	ASSOF
STAFF	10	2	1	0,5	7	1,5	7	1	1	5	0,25	7
MEMBERS	400	40	51	25	14	90	40	10	14	123	58	537
1-15 PERS	30%-120		50%-26	30%- 8	30%- 4		5%- 2	10%-1	20%-3	20%-25		
16-50 PERS	40%-160		28%-14	30%- 7	20%- 3		22%- 9	30%-3	60%-8	41%-50		
51-100 PERS	25%-100		14%- 7	20%- 5	30%- 4		25%-10	20%-2	20%-3	19%-23		
101 AND +	5%- 20		8%- 4	20%- 5	20%- 3		48%-19	40%-4	-	20%-25		
MILL TIED			4	3	2	3	6	2	4	26	7	3

BENCHMARK	NL	UAHE	DK
STAFF	2	1,5	3 P.T.
MEMBERS	55	132	14
1-15 PERS	60%-33	80%-106	10%- 1
16-50 PERS	30%-17	15%- 20	30%- 4
51-100 PERS	8%- 4	5%- 6	40%- 6
101 AND +	2%- 1	-	20%- 3
MILL TIED		2	1



KEY BENCHMARKS: ORG. AUTONOMY & SCOPE OF MEMBER COVERAGE

BENCHMARK	BDS	NASS	GRYM	SWE	FIN	SSHV	PUDS	ROM	MAFE	FFDM	VSEMH	ASSOF.
STATUS												
STAND ALONE:	YES	YES	YES	YES	-	-	YES	YES	YES	YES	YES	YES
HOSTED BY:	-	-	-	-	TEKNINEN KAUPPA	HANDEL SCHWEIZ						
SCOPE												
ST & MET DIST:	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES
OTHER ACT.	NO	NO	NO	NO	ALL TECHNI CAL TRADE	ALL SWISS TRADE ACTIVITIES				-WIRE DRAWING -FENCE PRODUCERS		-FERR.SCRAP -NF SCRAP -METAL WARE
BENCHMARK	NL	UAHE	DK									
STATUS												
STAND ALONE:	YES	YES	-									
HOSTED BY	-	-	BRANCH HOUSE									
SCOPE												
ST & MET DIST:	YES	YES	YES									
OTHER ACT.	NO	NO	-FENCES									



KEY BENCHMARKS: PROMO CONSTRUCTIONAL STEEL & PARTNER LINKS

BENCHMARK	BDS	NASS	GRYM	SWE	FIN	SSHV	PUDS	ROM	MAFE	FFDM	VSEMH	ASSOF
STEEL PROMO	YES	YES	YES	NO	YES	YES	YES	NO	YES	YES	YES	NO
PARTNERS												
	WGM ESHV WV STAHL	METALS COUNCIL	-NAT.LABOUR JOINT COM. -OCBS/OCAB CERTIF.BODY	NO	LABOR SKILLS LEGAL RESEARCH	INDUSTRY TRADING HVACR CONSTR	HIPH STAINLESS SCRAP CONSTR	NO	ENG.IND.	FFA -REBAR CERTIF. BODY	SKILLS	NO
BENCHMARK	NL	UAHE	DK									
STEEL PROMO	YES	YES	YES									
PARTNERS												
	WHOLE SALERS ORG	ASCEM	NORMS									



KEY BENCHMARKS OF NATIONAL FEDERATIONS: MEMBER PORTFOLIO

BENCHMARK	BDS	NASS	GRYM	SWE	FIN	SSHV	PUDS	ROM	MAFE	FFDM	VSEMH	ASSOF.
MEMBER ACCEPTANCE:												
CARBON ST.STH.	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	NO	YES
STAINLESS STH.	YES	NO	YES	YES	YES	NO	YES	YES	YES	YES	YES	YES
ALLOY STH.	YES	YES	YES	YES	YES	NO	YES	YES	YES	YES	YES	YES
NON FERR.STH	NO	NO	NO	YES	YES	NO	NO	YES	NO	YES	YES	YES
SSC	YES	YES	YES	YES	YES	YES	YES	NO	YES	YES	NO	YES
WIRE DRAWERS	NO	NO	NO	NO	NO	NO	NO	NO	YES	YES	NO	YES
REBAR FABRIC.	YES	NO	NO	NO	NO	NO	YES	YES	YES	NO	NO	YES
FENCE PROD	NO	NO	NO	NO	NO	NO	NO	NO	NO	YES	NO	YES
OTHERS	-	ASS.	ASS.	-	-		ROOFING	-	-	PROFILERS	-	-



KEY BENCHMARKS OF NATIONAL FEDERATIONS: MEMBER PORTFOLIO

BENCHMARK NL UAHE DK

MEMBER ACCEPTANCE:

CARBON ST.STH.	YES	YES	YES
STAINLESS STH.	YES	YES	YES
ALLOY STH.	YES	YES	YES
NON FERR.STH	YES	YES	YES
SSC	YES	YES	YES
WIRE DRAWERS	NO	NO	NO
REBAR FABRIC.	NO	YES	YES
FENCE PROD	NO	NO	YES
OTHERS	-	-	-



KEY BENCHMARKS OF NATIONAL FEDERATIONS: REVENUES & MEMBER FEES

BENCHMARK	BDS	NASS	GRYM	SWE	FIN	SSHV	PUDS	ROM	MAFE	FFDM	VSEMH	ASSOF	NL	UAHE	DK
REVENUE SOURCES:															
MEMBER FEE	50%		8%	100%	80%	65%	47%	100%	95%	84%	60%	83%	90%	90%	99%
EVENTS	5%		-	-	5%	15%	16%			6%	10%	1%		2%	1%
OTHER FEE	-		-	-		10%				7%	20%	1%			
TRAINING	40%		-	-	10%	10%	3%			3%	10%	3%	10%		
SALES	5%		1%	-	5%		30%		5%			12%			
SUBSIDIES	-		90%	-			2%								
OTHER	-		1%	-			2%							8%	

MEMBER FEE IN EUR															
LOWEST	500		375	1 200	350	0	1 960		1 112		650	550	5 000	700	
HIGHEST	4 500		1 000	8 000	2 840	50 000	3 910		2 235		1 200	17 000	35 000	10500	
AVERAGE	2 700		400	2 000	1 400	3 000	2 540	960	2 052		800	1 400	10 000	700?	

MEMBER FEE BASE:															
INCOME	-		-	YES	YES		YES		YES			MIX			
VOLUME	YES		-	-								YES	YES		
HEAD COUNT	-		YES	-		YES						YES			
OTHER	BRANCHES		-	-				FLAT FEE	+/-LIMITS	8 GROUPS		SURFACE		CENTER	COUNT



NATIONAL FEDERATIONS: SERVICE OFFER

FEDERATION	A	B	CH	D	DK	F	FI	E	HU	I	N	NL	P	PL	RO	S	UK	TOTAL
MEETINGS	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	17
CONFERENCES	X		X	X	X	X		X		X	X	X		X		X	X	15
MARKET STATS	X		X	X	X	X	X	X	X	X	X	X		X	X	X	X	12
MAG/INFO/NEWS		X	X	X		X	X	X	X			X		X	X		X	11
LOBBYING/REPRES.			X	X	X	X	X		X			X		X		X	X	10
EDUCATION			X	X	X	X	X	X				X					X	8
LEGAL ADVICE	X		X	X			X			X		X				X		7
PRICE INDEX		X			X			X	X					X	X			6
DELIVERY TERMS				X		X	X				X	X				X		6
HSE			X		X	X		X									X	5
CREDIT RISKS			X				X		X								X	4
CUST. MEET/PROM			X		X		X									X		4
BOOKLETS		X		X													X	3
FREIGHT ISSUES				X		X									X			3
BUSINESS PROVISIONS				X														1



KEY ITEMS OF VALUE CREATION BY NATIONAL FEDERATIONS: 2014 SURVEY

BDS: - STATISTICS, MARKET REPORTS, REGIONAL MEETINGS, NATIONAL EVENTS, MARKET STATISTICS, PROFESSIONAL EDUCATION AND COURSES, WEBSITE

STAALFEDERATIE: COORDINATION OF DELIVERY TERMS, MARKET STATISTICS, PROFESSIONAL MEETINGS, “INSPIRING” MEETINGS, WEBSITE

MAFE: MARKET STATISTICS, INVITE GUEST SPEAKERS, WEBSITE, PRICE MONITORING, BLACKLIST OF BAD PAYERS

ARDIMET: FOCUS ON MEMBER ACQUISITION AND FEDERATION DEVELOPMENT,

ASSOFERMET: MONITORING OF NEW LAWS, LEGAL INFORMATION, MEETINGS ABOUT MARKET SITUATION, MARKET STATISTICS,

AUSTRIA: STATISTICS & MARKET REPORTS; GUEST SPEAKERS FOR INSPIRING MEETINGS, LEGAL ADVICE; MONITORING LAWS AND NORMS



KEY ITEMS OF VALUE CREATION BY NATIONAL FEDERATIONS: 2014 SURVEY

FFDM: MARKET STATISTICS, HSE ISSUES, CONVENTIONS, MEETINGS,

DANISH STEEL DISTRIBUTION: MEETINGS, SPECIAL FOCUS ON SME MEMBERS

GRYMAFER: STEEL PRICE INDICES, MEETINGS, EDITION OF STEEL VADEMECUM

**SWEDEN STEEL DISTRIBUTION: CONTACTS WITH AUTHORITIES & OTHER
EXTERNAL ORGANISATIONS; MARKET STATS; DELIVERY TERMS; INFO
ABOUT INDUSTRY ISSUES; SEMINARS; LEGAL ADVICE; MEETINGS
WITH IMPORTANT CUSTOMERS**

**SPAIN: MARKET STATISTICS; STEEL PRICE INDEX, MAGAZINE; MEETINGS;
CONFERENCES; HSE INFORMATION; TRAINING,**

**POLAND: FOCUS ON SPECIFIC SERVICE OFFER FOR SMALL MEMBERS EACH AND FOR
LARGE MEMBERS EACH, PRODUCT COMMITTEES MEETINGS & EVENTS,
STATISTICS, FAMILY RELATED MATTERS, SOCIAL LAWS, VAT PROBLEMS,**



KEY ITEMS OF VALUE CREATION BY NATIONAL FEDERATIONS: 2014 SURVEY

SSHV/ASCA: EDUCATION AND PRODUCT COURSES; CONTACTS TO POLITICIANS AND AUTHORITIES; UPDATES ON NORMS, REGULATIONS, LAWS; STATISTICS AND INFORMATION ABOUT PRODUCT MARKETS, MEETINGS & CONFERENCES; FIRST LEVEL LEGAL SUPPORT; REPRESENTATION IN SWISS DIRECT POLITICAL CONSULTATION PROCESS

*May we require **all** member federations to complete or amend this listing and mail it back to office@eurometal.net, before 15 November 2016 in order to finalize this benchmark survey*