

Press Information

Date: 31 July 2011

Roto analyses outside door markets / Important basis for new generation of locks / Score globally with "DoorSafe 600" / "Slight international growth" on balance / Differences predominate / Exemplary European check

Useful Research

Leinfelden-Echterdingen - (rp) Despite several common features, anyone who studies trends, materials, techniques and volumes of international outside door markets will ultimately encounter more or less major differences. This is how Roto summarises the results of its own extensive analyses. According to the company, the reason for conducting these analyses was the development of a completely new generation of locks. The "DoorSafe 600" product range introduced from August 2011 now enables the manufacturer to offer the "most complete door-related product range from a single source".

Like its window business, the door business of the hardware specialist has a strong international character. If the US with its completely different market and product conditions is excluded, today Roto already sees itself as one of the three largest industrial suppliers with its door portfolio. Nevertheless, there is still plenty of room to improve. Especially the new offensive in the field of multi point locking systems emphasises the great strategic importance of door technology.

Here the motto is: Acting internationally means acting according to the requirements. For example, the product range policy must take the distances between the profile cylinder and the handle, which usually differ from country to country and range between 70 and 94 mm, into account. In addition, it is important to offer solutions for backsets from as little as 25 mm, which enable use in extremely narrow profile

designs. The generally continually growing demand for individual equipment results in another important competence factor.

Europe made (more) transparent

The manufacturer calls the examination of relevant markets “basic work which is just as indispensable as it is difficult”. As virtually no reliable official or other statistics and surveys were available, they were primarily forced to conduct their own research. Roto is not afraid to invest the considerable finances and time required, for only then can well-founded decisions be made – including major investment projects like the “DoorSafe 600” product line.

According to calculations, alone the European core markets for outside door hardware (including aluminium) represent a total volume of more than 600 million Euros. The values determined for the individual regions are reportedly based on the assumption that the three components locks, hinges and thresholds are used for every door. That is equivalent to an annual quantity of 10 to 14 million doors in Europe. This provides at least “usable clues” as to the current and future development of demand.

All in all, Roto expects a trend to “slight growth” for the international main entrance door and main door markets. However, behind this overall forecast lies a broad range of possibilities. While on the one hand, there are the “problem countries” like Spain, Portugal, Greece and Great Britain, on the other hand, the recovery or upward trend is having a positive effect in Eastern Europe or Russia and China.

Four in comparison

In addition to the pure consideration of volume, findings on country-specific materials and technologies, customer requirements and market trends are also particularly important. The hardware experts

cite four European examples of the frequently “greatly differing conditions”. The brief profiles at a glance:

Germany: The percentages of frame materials (currently one-third aluminium and PVC, 25 % timber and 10 % “others”, such as timber/aluminium combinations, each) remain relatively constant. For example, the profile quality increases due to thermal separation with aluminium profiles and deeper profiles with more chambers. The U-value topic, which was mostly limited to windows up until now, will also become more important for doors in future. Recognisable trends: heavier, higher and “more elegant” (concealed hardware) doors with a greater burglary protection function; growing popularity of “convenience locks” (automatic locking systems, electromagnetic versions). Cylinder-operated locks dominate in Germany.

Italy: Timber (45 %) and aluminium (40 %) hold an almost equal position among materials, followed by PVC with approx. 15 %. A concentration on the “cheap segment” (more often aluminium) and the high-quality sector (more often timber) is apparent here. The market generally tends to favour high-quality solutions for doors and hardware, higher and heavier doors and design orientation with concealed hardware. 2-leafed doors continue to be a segment peculiar to Italy. Also increasingly important: Convenience and security. The locks are 100 % cylinder operated.

Great Britain: The materials primarily consist of 35 % PVC and “composite” doors (PVC frames and sashes made of a mixture of fibreglass, timber and steel). Aluminium and timber make up a share of approximately 15 % each. The most important trends: continually growing “composite” quota, also standard-dependent increasing demand for energy-efficient, heavier doors with triple glazing, up to three metres high. Therefore, heavier timber doors are easier to keep impermeable over their entire height. Handle-operated locks are the rule.

Hungary: PVC is the No. 1 material with 55 %, followed by timber (35 %) and aluminium (10 %). The “cheap segment” for back doors (PVC profiles, E-cam locks) and the growing “middle sector” with good quality and, for example, two-bolt locks dominate the market. The security mentality of final customers determines the purchase of main doors with multi point locking systems and the installation of locks with additional cylinder-locking devices. In Hungary the market is approximately 90 % “handle-operated”.

Good to know

And according to Roto, this is also part of a qualified market analysis: Information on which professional group makes the lock decision in practice. Once again, the often widely differing situation was confirmed. While in some countries the door manufacturers “are in charge”, in other regions the trade has more or less of an influence on the fabricators. This knowledge is without a doubt useful for a targeted market offensive. And this also applies to the new “DoorSafe 600” generation of locks, which celebrated its premier after an 18-month development period and intensive tests in the field.

Captions:

According to Roto surveys, the European core markets represent a total volume of over 600 million Euros for outside door hardware. That is approximately equivalent to an annual quantity of 10 to 14 million doors. All in all, the manufacturer generally expects a trend to “slight growth” for the international main entrance door and main door markets in future.

Graphics: Roto

Europa_Marktvolumen.jpg

2-leafed doors are one of the special characteristics of southern countries like Italy and Spain. A general result of the international

Roto analyses of materials and technologies, customer requirements and market trends: more differences than similarities.

Photo: Roto

Doppelfluegeltuer.jpg

The demand for timber doors up to three metres high, which are heavier and can therefore be kept sealed off over their entire height is, for example, on the increase in Great Britain. Thanks to modularly connectable additional locking points, the new "DoorSafe 600" generation of locks also offers reliable solutions in practice for this application.

Photo: Roto

Hohe_Tueren.jpg

Germany and Italy are among the countries in which cylinder-operated locks dominate or can be found exclusively. Roto also found that the increasing focus on design criteria, and with it on concealed hardware, is a major aspect of both markets. One conclusion of the door-related company research is: Acting internationally means acting according to the requirements.

Photo: Roto

Zylinderbetaetigt.tif

Handle-operated locks are, among other things, commonplace in Great Britain and Hungary. In their studies, the hardware specialists at Roto determined that PVC heads the list of the most frequently used frame materials in both these countries.

Photo: Roto

Drueckerbetaetigt.tif

Print free – copy requested

Publisher: Roto Frank AG • Wilhelm-Frank-Platz 1 • D-70771 Leinfelden-Echterdingen • Tel.: +49 711 7598-0 • Fax: +49 711 7598-253 • info@roto-frank.com

Editor: Linnigpublic Agency for Public Relations GmbH • Koblenz office • Fritz-von-Unruh-Straße 1 • D-56077 Koblenz • Tel.: +49 261 303839-0 • Fax: +49 261 303839-1 • koblenz@linnigpublic.de; Hamburg office • Flottbeker Drift 4 • D-22607 Hamburg • Tel.: +49 40 82278216 • Fax: +49 40 82278217 • hamburg@linnigpublic.de