

# Europacable 2017 General Assembly

## European Market Outlook

### European Wire & Cable Sector and Impact of Brexit

Mr. Philip Radbourne  
Director Wire & Cable  
Integer

## **Europacable 2017 General Assembly**

**Brussels, 18 May 2017**

### **European Wire & Cable Sector and Impact of Brexit**

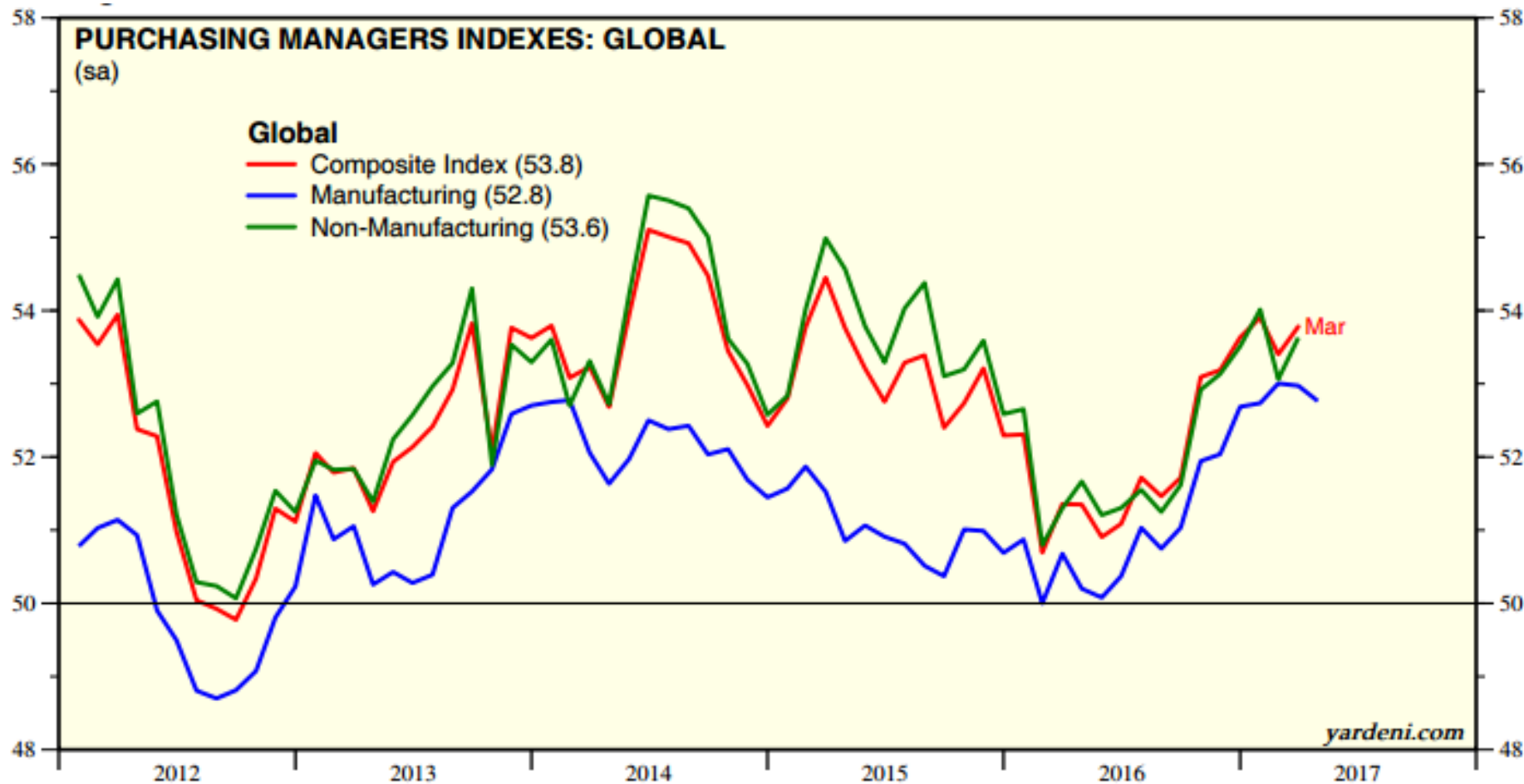
**Philip Radbourne  
Director – Research  
Wire & Cable Team  
Integer Research Ltd  
London, UK**

- **Introduction**
- Global economy – getting stronger
- Political uncertainty greatest risk to outlook
- Global wire and cable markets – key trends and developments
- European wire and cable demand trends
- Brexit

# Last year was volatile, and 2017 seems just the same...

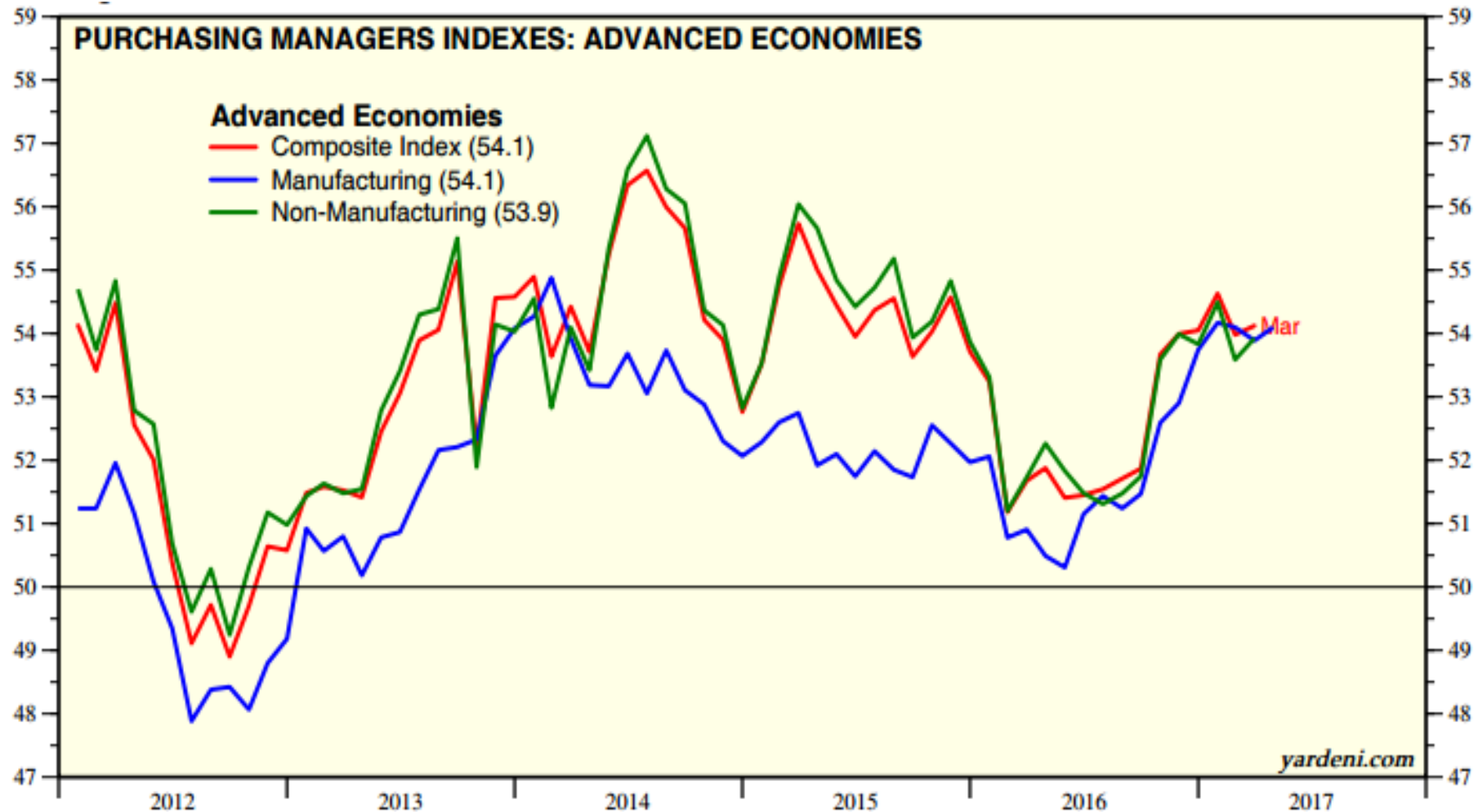


# JPMorgan Global PMI continues to expand into 2017



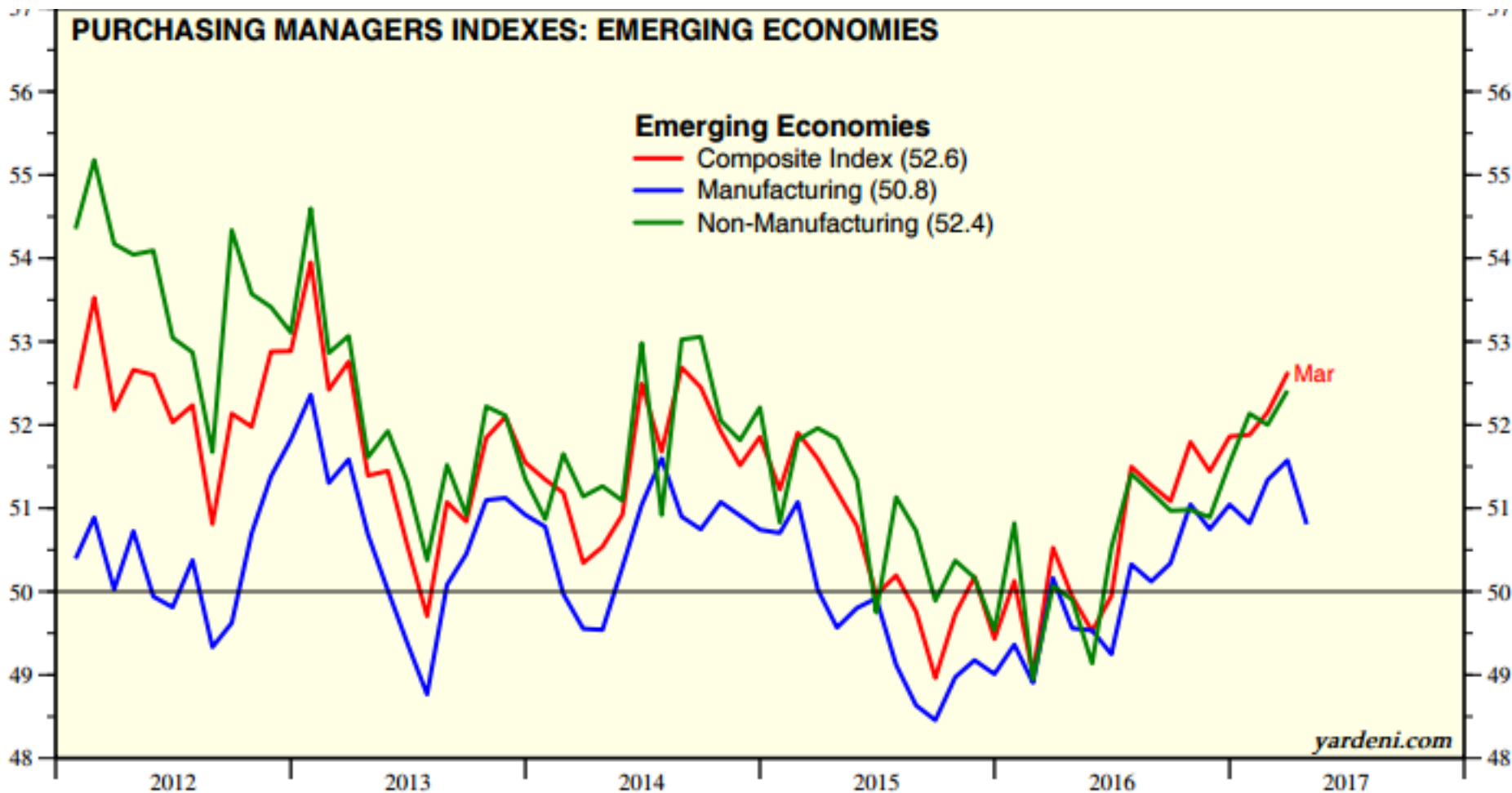
Data: Integer Research Ltd , yardeni.com

# Developed markets show solid growth – a turnaround from Q2 2016



Data: Integer Research Ltd, yardeni.com

# Emerging markets show growth into 2017, Brazil, Russia stronger, but India weak



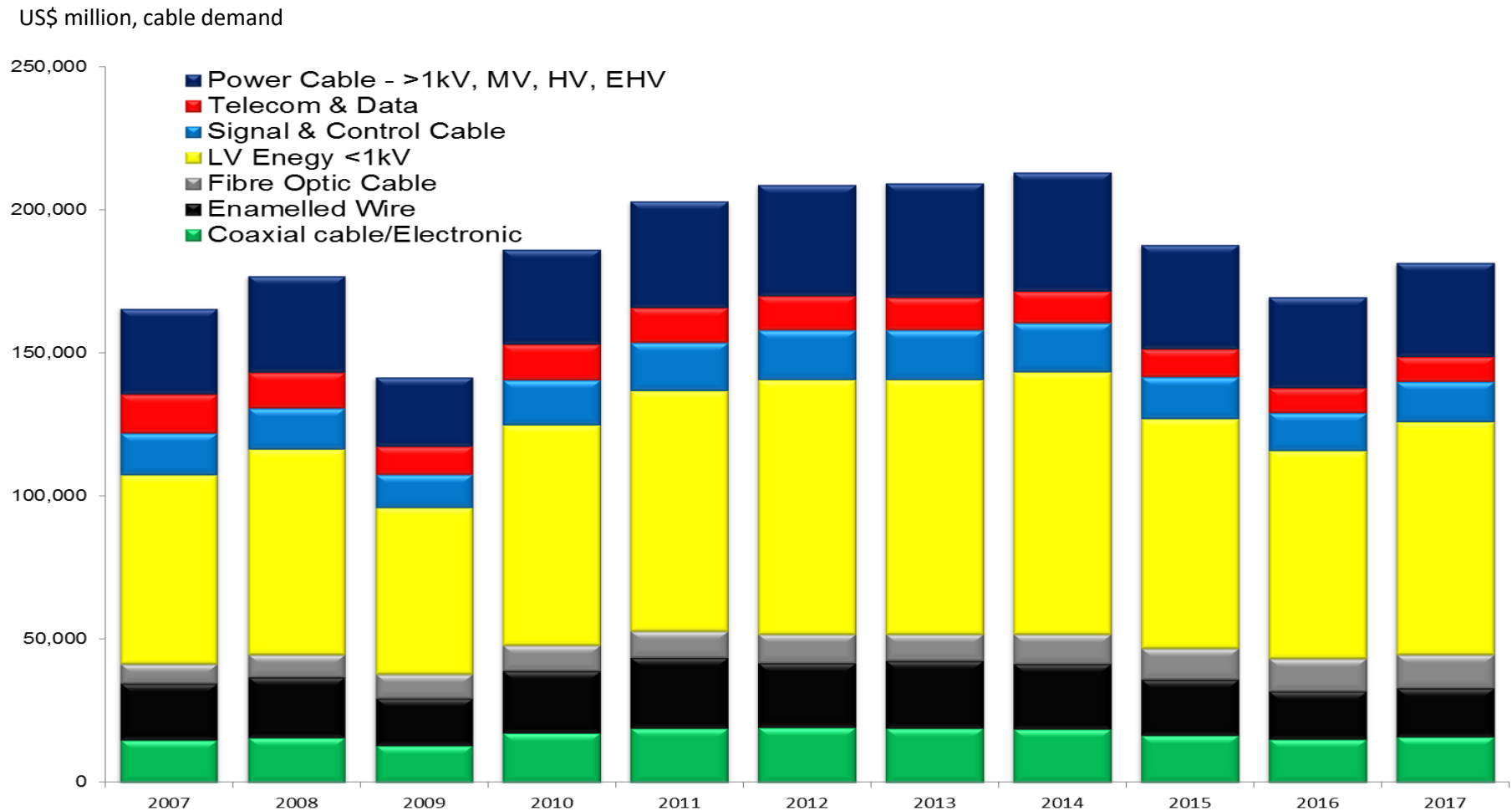
Data: Integer Research Ltd , yardeni.com

# Global Wire & Cable sector: countries, plants and products



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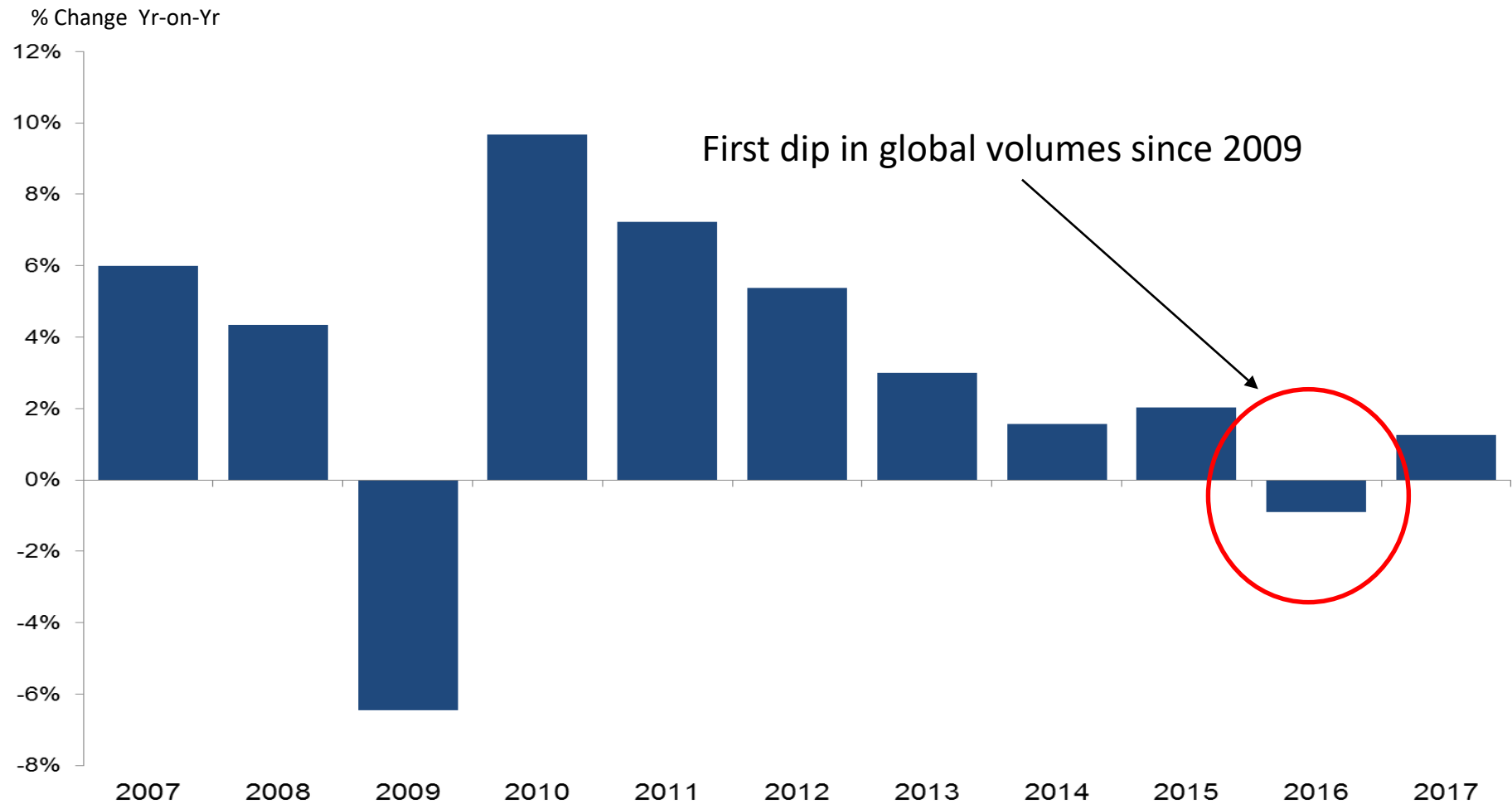
# Global wire & cable demand, US\$ bn, 2007-2017



Data: Integer Research Ltd , Global data service 2016

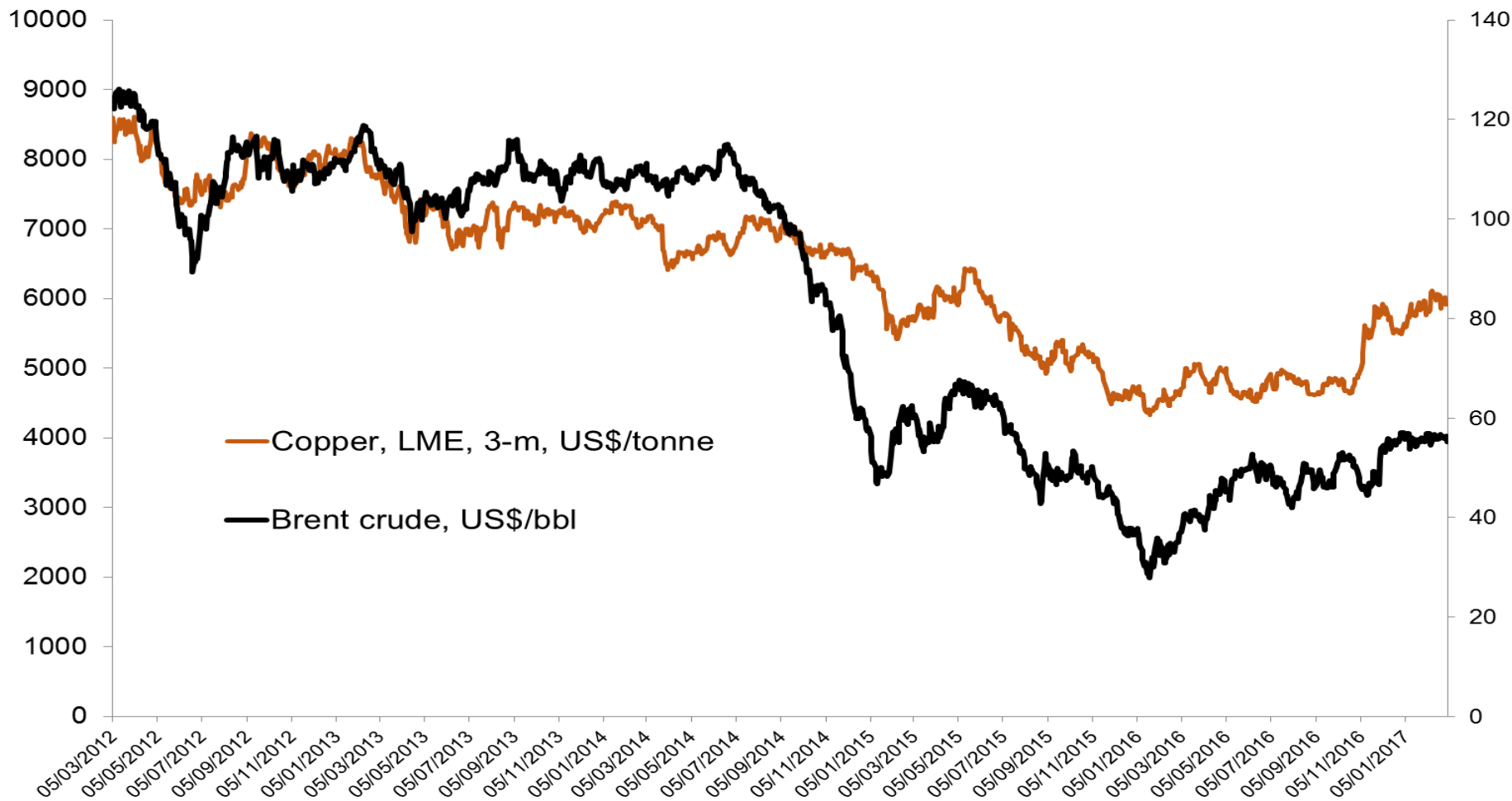
# Global wire & cable production

## Gross cable weight, % change, Yr-on-Yr



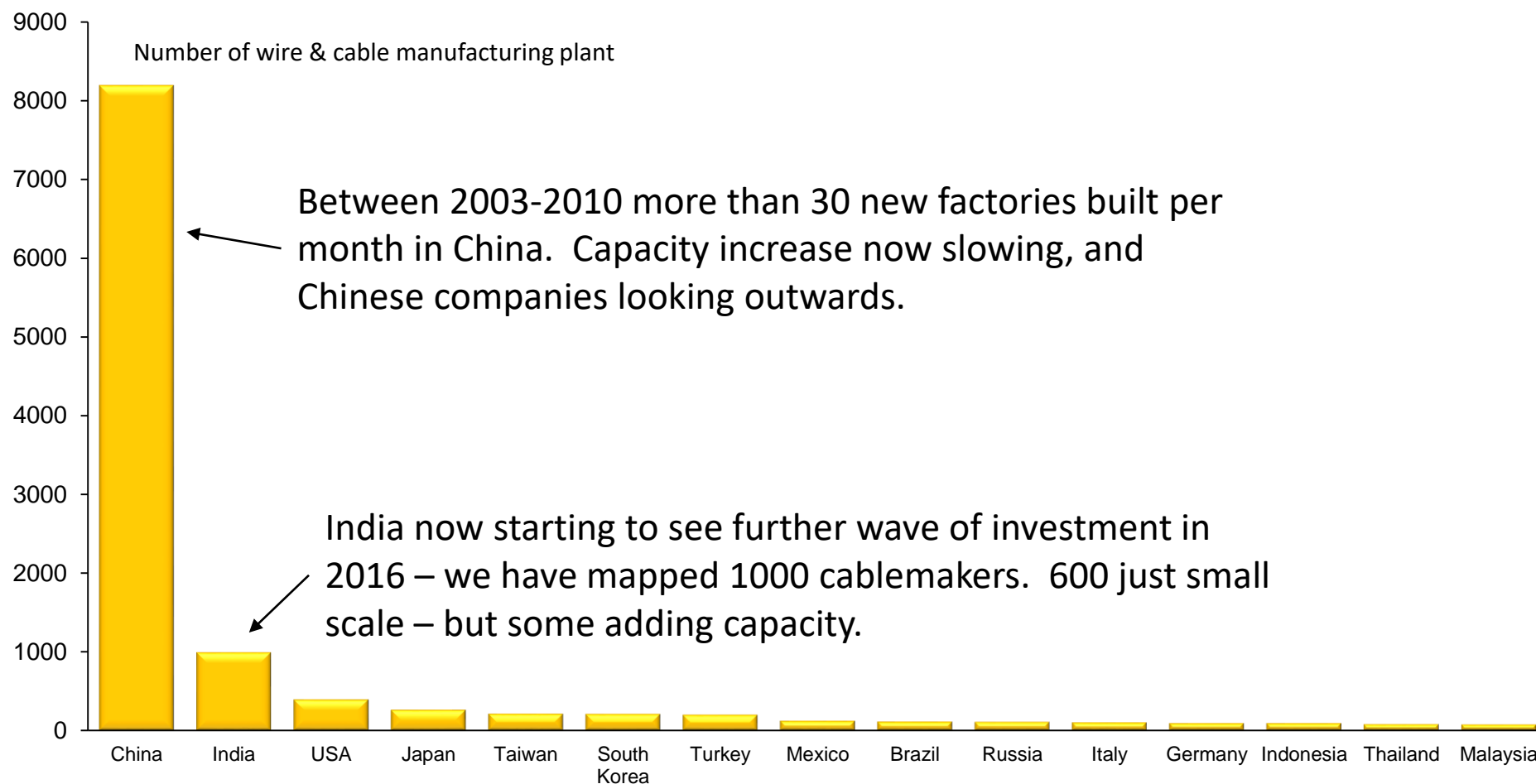
Data: Integer Research Ltd , Global data service 2017

## Copper & oil prices supported by global recovery, but Texas Permian basin likely to rival Gwardar field in size.



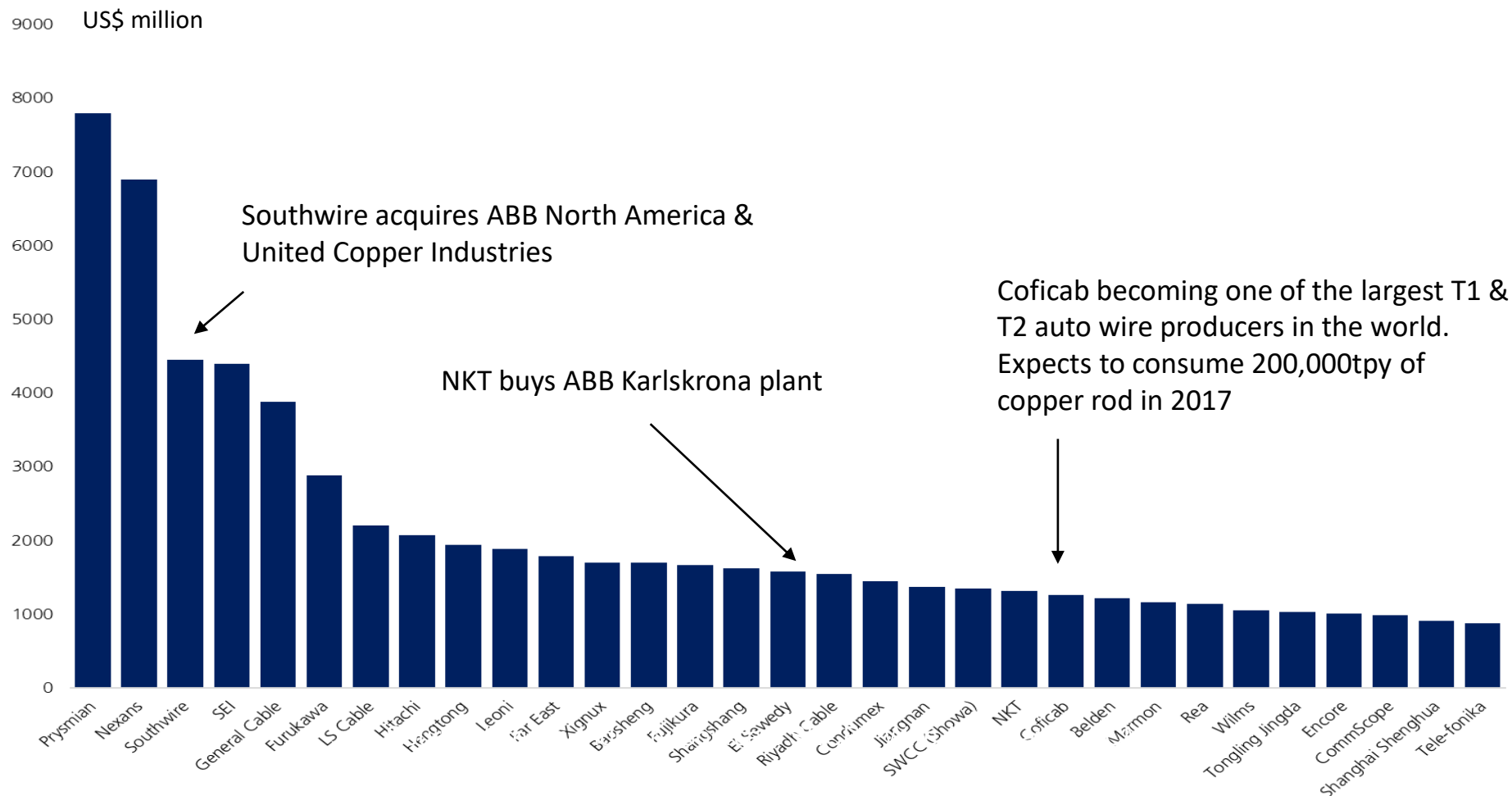
Source: Reuters, LME

## Number of wire & cable plants by country in 2016



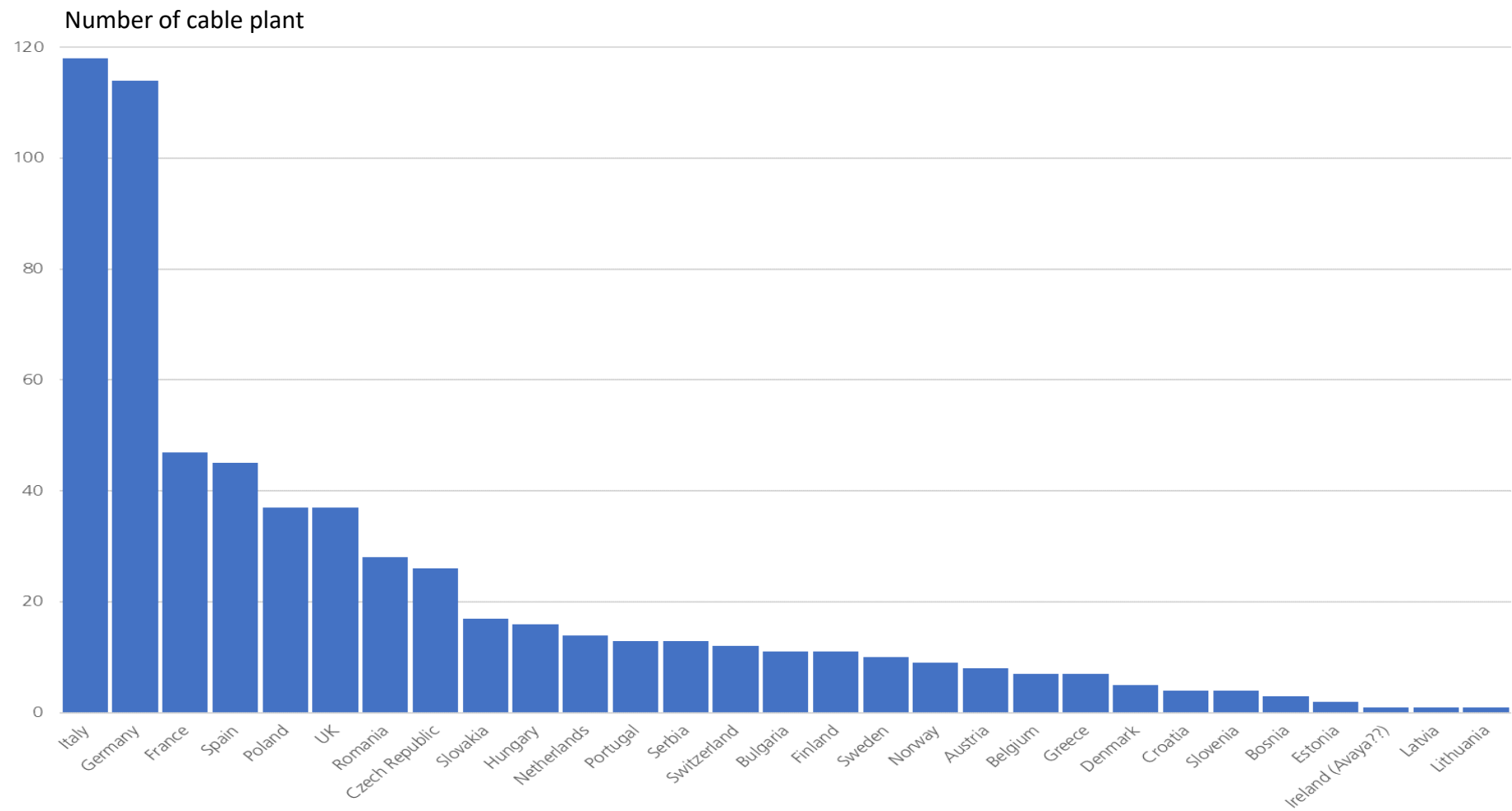
Data: Integer Research Ltd , Global data service 2016

# The leading global wire & cable makers



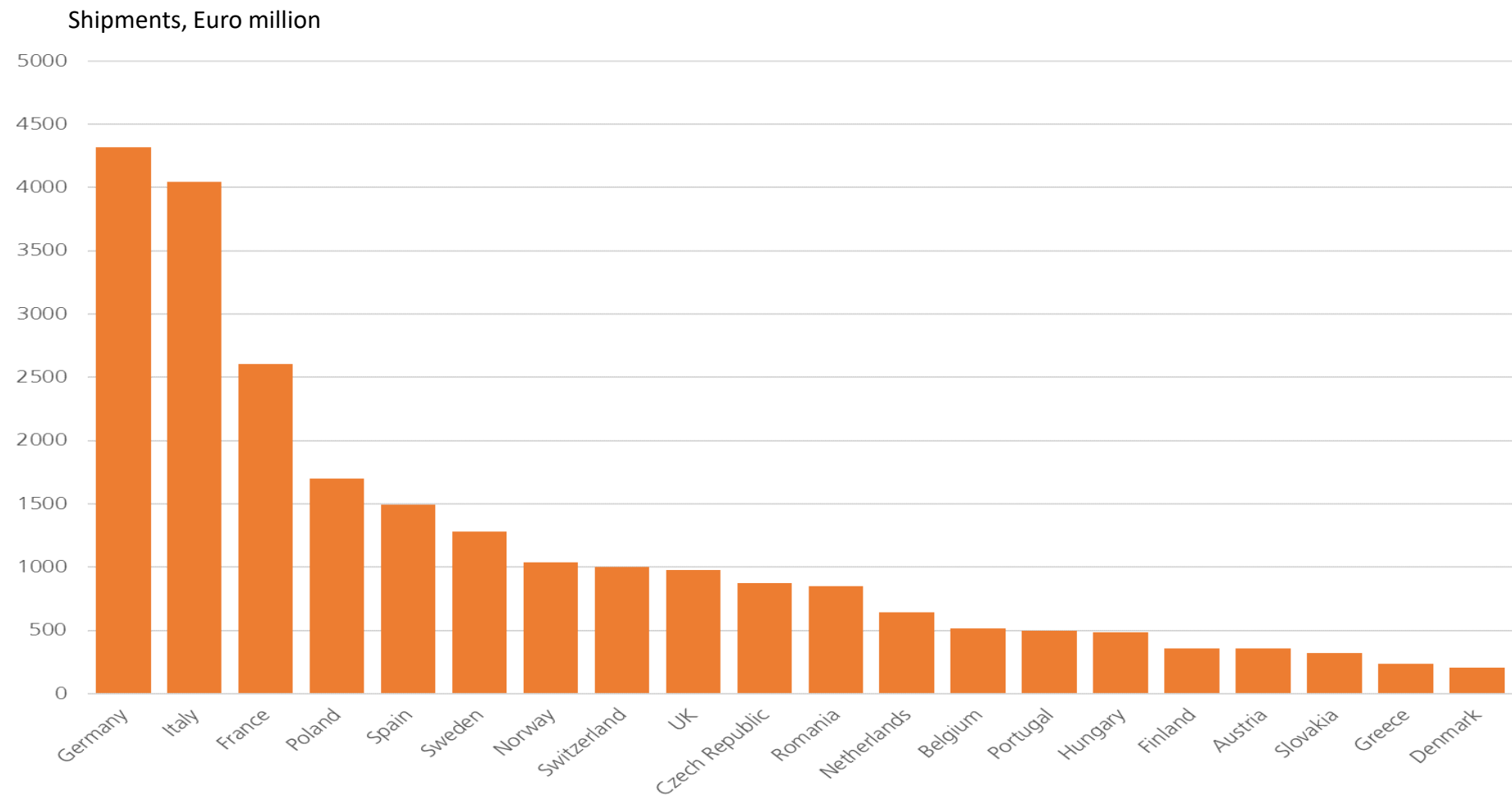
Data: Integer Research Ltd , Top 100 in 2016, Global data service 2017

# Number of European cable plants by country in 2015



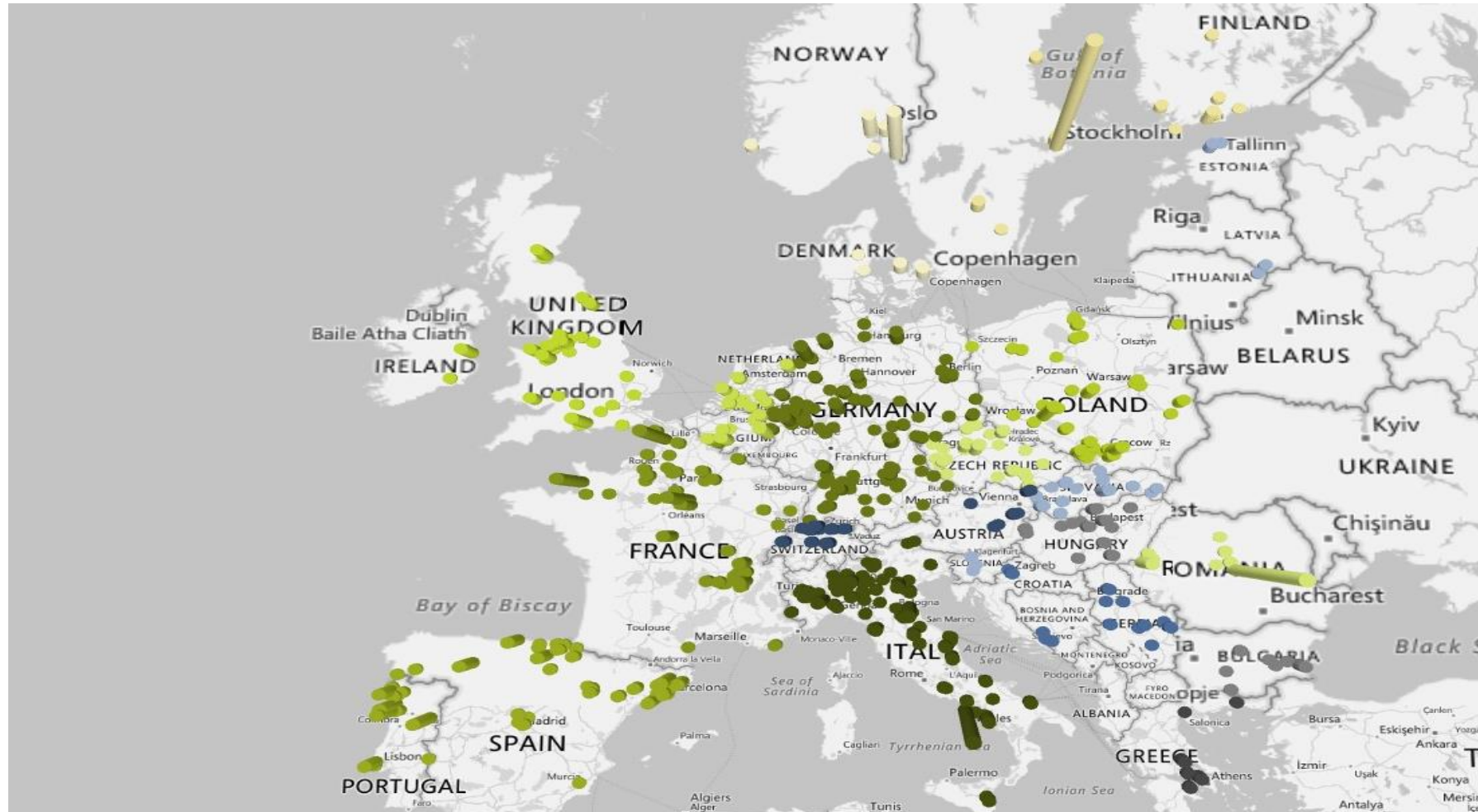
Data: Integer Research Ltd , Global data service 2016

# Production by country in 2015



Data: Integer Research Ltd , Global data service 2017





Source: Integer Plant Databases – Europe

Europacable, Brussels, 18 May 2017

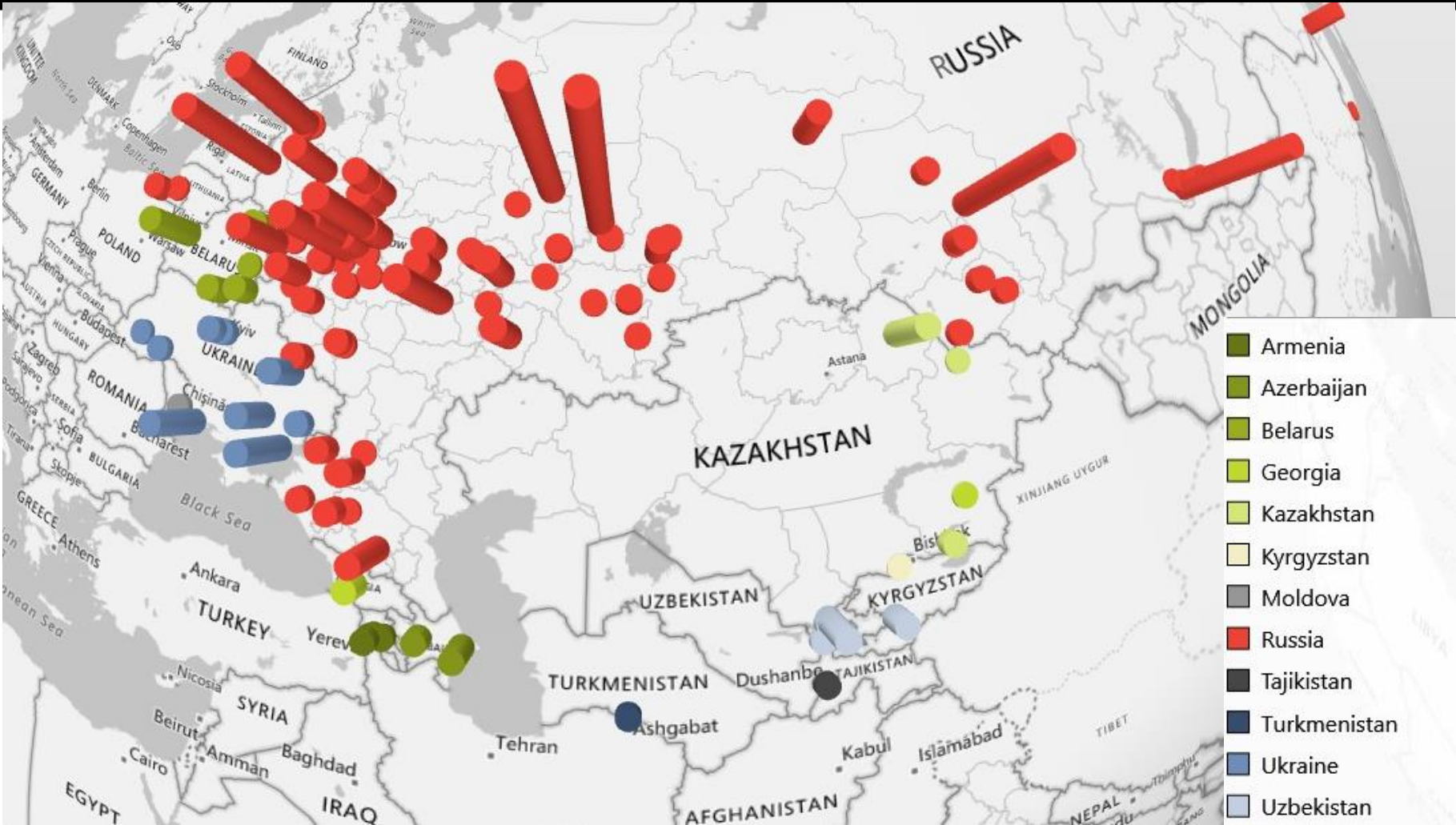
## Maps of German Production, cable plant and revenue

Continued success and innovation – Leoni's new auto plant.





Integer has recently reviewed cable makers in Russia and the CIS region, identifying the largest cluster on the edge of the European Union



Source: Integer Plant Databases – Russia & CIS



insight  
beyond  
numbers

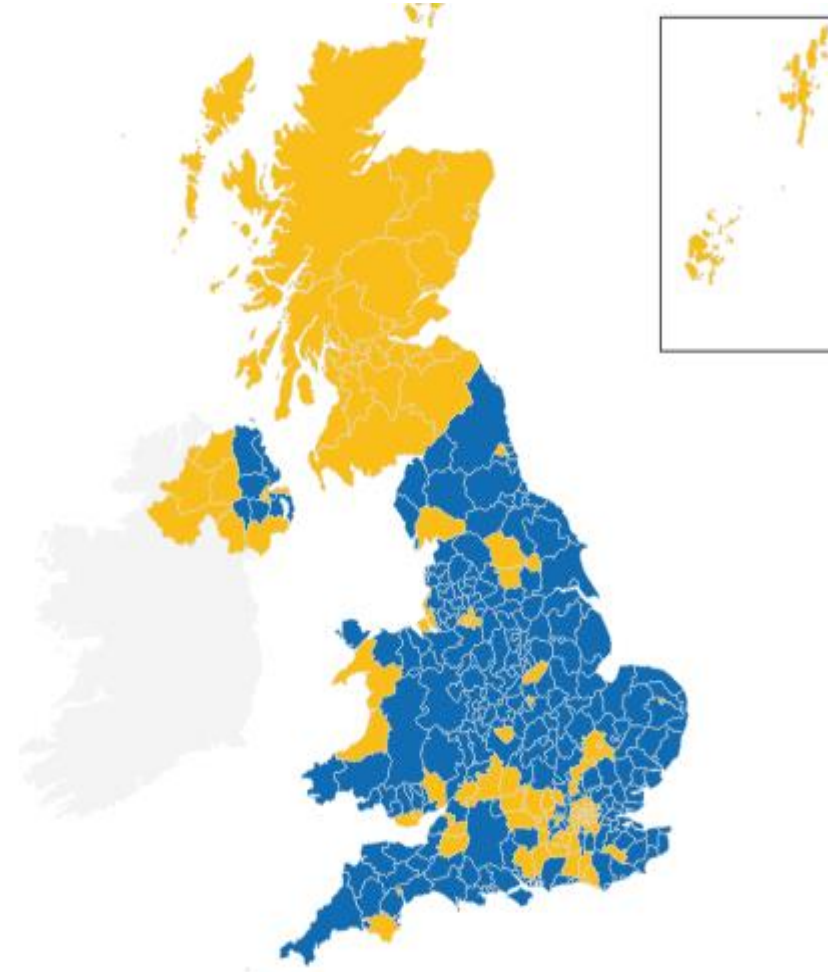


# The Impact of Brexit

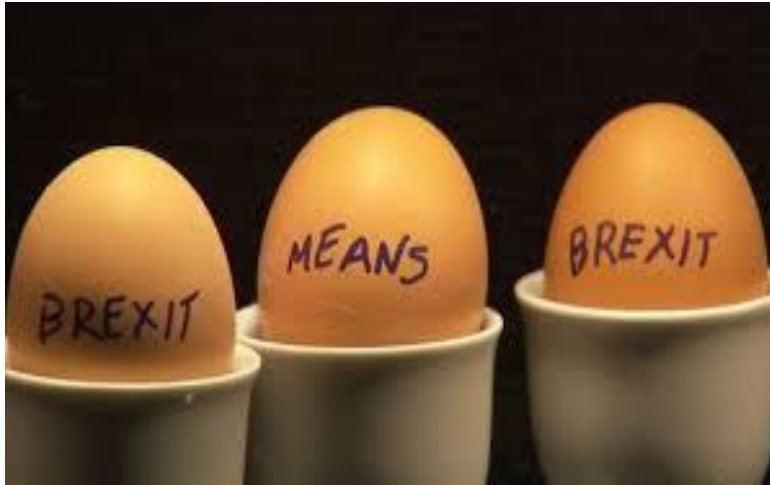


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- **Brexit**

A close vote for Brexit across the whole UK, but was decisive in England. Article 50 triggered. Many firms now look at contingency.



# Brexit means Brexit...what does that mean?



Soft Brexit



Hard Brexit



# Ranges from soft to hard boiled Brexit

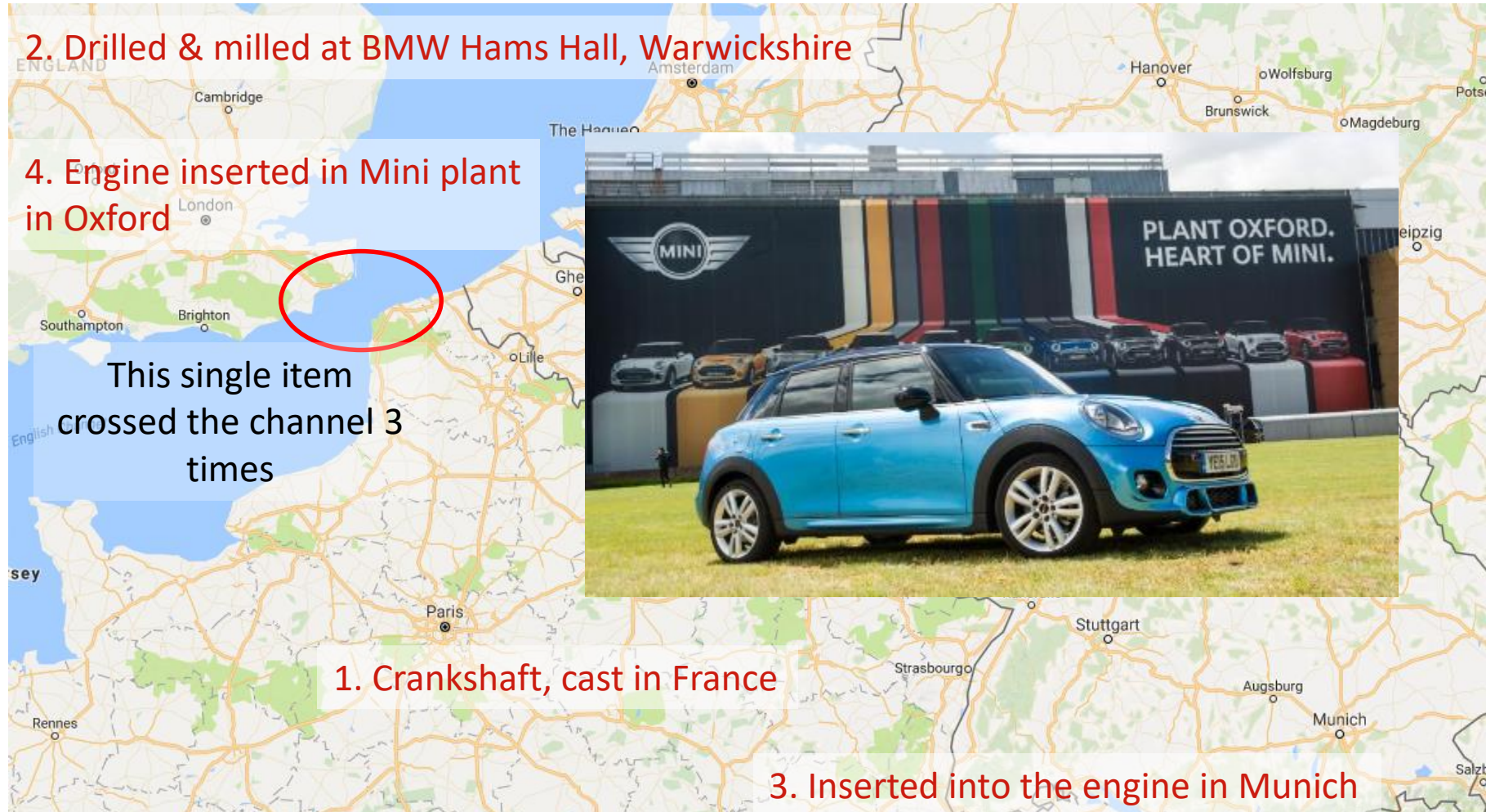
Alternative Brexit models						
	EU membership	Norway	Switzerland	Canada	Turkey	WTO - Hard Brexit
Single market member?	Full	Full	Partial	No	No	No
Tariffs?	None	None	None	Reduced tariffs through free trade deal	None on industrial goods	Yes
Accept free movement?	Yes	Yes	Yes	No	No	No
In the customs union	Yes	No	No	No	Yes	No
Makes EU budget contributions	Yes	Yes	Yes (but smaller than Norway)	No	No	No

Data: BBC, Economist

This took 8 years to negotiate



# One component...crankshaft on a BMW Mini. All shipped just-in-time!



Data: Guardian, BMW

## NEW upcoming reports and databases

- **Global Power Cable Report:  
HV/EHV/UHV and Submarine Cable  
Supply**
- **Focus report:  
Automotive Wire & Cable**

Keep an eye on our website for updates  
[www.integer-research.com/cable](http://www.integer-research.com/cable)

# Advanced Cable North America 2018

Advancing innovation and strategy to meet new market demand

New

February 27 – 28, 2018 – Miami

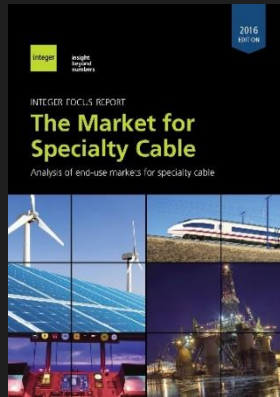
A new high-end platform for senior executives and strategic leaders in the North American cable market to:

- Explore market trends, challenges and opportunities
- Identify emerging growth areas in energy, data and automotive cable sectors
- Learn best practices to satisfy changing market demand
- Connect and network
- Register early and save - contact us to reserve your place

# Thank you for your attention

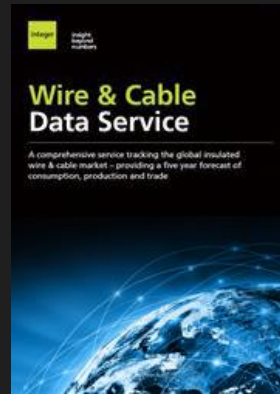
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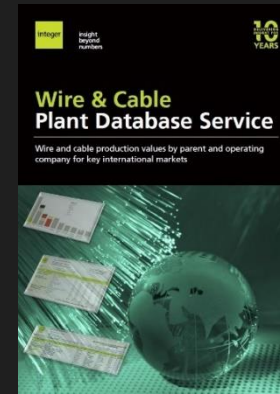
Detailed demand and production analysis with forecasts by key vertical markets including:

- Aerospace
- Mining
- Rolling Stock
- Merchant and Military Shipping
- Offshore Oil and Gas
- Renewables



Track the global insulated wire & cable market across:

- 80 countries
- All major product categories
- + Five year forecasts of consumption production and trade



Identify, locate, examine and understand production plant by plant for more than 30 cable product types across 95 countries\*.

\*countries/regions can be purchased separately



Independently verified wire and cable production rankings across the globe.

**NEW** 2017 edition coming this September