



2023 SEFA Annual Meeting

Our 2023 Annual Meeting will be held November 1 - 3 at the Omni Hotel in Orlando. We had a record number of members and guests (141) registered to attend the 2022 meeting so we're going to try to build on those numbers (this time without a hurricane or other natural disaster). The SEFA Annual Golf Outing will be an 8:00 AM shotgun start on Wednesday November 1st so you have plenty of time to sharpen your skills.

The 2023 SEFA Market Survey

The deadline to respond to the survey has passed HOWEVER, I want to give everyone one last opportunity to complete the survey. According to TDA Research we have one of the strongest response rates of any survey they manage. Ever wonder what that response rate is? Without TDA identifying any particular company this is how it breaks down:

Executive Members

North America -	51%
Europe -	80%
China -	21%
India -	20%
ROW -	20%
Total -	43%

Advisory Board / Associates

North America -	35%
Europe -	67%
Total -	40%

Good response, but I think we can do even better. There are a few things we are going to do before closing out this survey on February 17th:

- **First**, in order to increase the Chinese response rate TDA translated the survey into Mandarin and sent the link to our members in China.
- **Second**, we are going to focus on the Advisory Board/Associate response rate by giving them the survey questions that only apply to them.
- **Third**, we have attached the survey questions for both surveys (Executive Members and Advisory Board/Associates) to this newsletter. This will streamline the process by giving everyone the opportunity to speak with their staff members and to research/collect the necessary data before completing the online survey.

The biennial SEFA Survey has become one of the most valuable informational tools our members have, so we would rather obtain the most accurate and robust response rate possible even if this delays the publication of the survey by 30 days. Please respond to this email if you have any other suggestions or questions. The new deadline is February 17 and that date will be "final final". Expect the Survey from Arkady at TDA within the next 10 days.

Advisory Board Updates

Congratulations to Brian Richard on his unanimous election as Co-Chair of the Advisory Board. Brian will serve alongside Leslie Ashor. Our thanks to Charlie Klee for his many years of service as a Co-Chair of this important Board. We would also like to congratulate Dario Tonelli who has been unanimously elected to serve on the Advisory Board Membership Committee. Dario will join Diane Kase, Brian Richard, Leslie Ashor and yours truly on this Committee.

Board of Directors Vacancy

With the retirement of Hank Von Der Bruegge from Durcon, there is now a vacancy on the Board of Directors. If any Executive Member is interested in serving on the Board please let me know. Give me a call if you have any questions about the time commitment involved in serving. Hank has been to more SEFA meetings as a member representative than anyone else. I met Hank in 1990 when he attended his first meeting and I will miss him, his larger than life personality and the many contributions he has made as a Committee Co-Chair and Board member.

February 15th Zoom Meeting with Alliant Insurance Services

Our members all buy insurance without the many benefits of belonging to an insurance buying cooperative. Many trade associations provide this valuable benefit to its members and SEFA has decided that it is time to explore this opportunity for our members.

A team from Alliant Insurance Services (AIS) was scheduled to make a 30 minute presentation during the November 10th General Session to discuss this program. We had also made arrangements for a private meeting room so that the AIS Team could meet with any of our members who were interested in talking with them. Since we were not able to accomplish this last November, we have scheduled a February 15th Zoom meeting from 11 AM to 12 Noon (NY Time) so that Alliant may make this presentation remotely.

AIS has already completed a study of the benefits offered to SEFA members via a SEFA insurance and risk management program. If we have enough SEFA members interested in this program it will result in better insurance coverage, lowered premiums, more attentive service and a potential for profit-sharing directly with SEFA members. An evite will be sent to those at your company who are involved in making insurance decisions and a complete agenda will be sent in the coming weeks.

That's all I have for now. I look forward to seeing you in our world travels throughout the year.

2022 SEFA Market Survey

Intro Page

Top-Down Analytics (TDA), in collaboration with the Scientific Equipment and Furniture Association (SEFA), is conducting a laboratory furniture and enclosures global market study. The results of this survey will become an integral part of a market report, which will be made available free of charge to all current SEFA members in good standing. Please be assured that TDA has agreed your responses will be completely confidential, and all data will be scrubbed from any company-identifying information and used and presented only in aggregate. The raw results of the survey will not be shared with anyone, including SEFA. We thank you for helping us in this important effort to present the industry with the most accurate market intelligence data, which everyone will benefit from.

Throughout the survey please use the previous/next arrows at the bottom of each screen to navigate. Please do not use your browser buttons.

Please click NEXT below to continue

Basic Demographics

What is the name of your company?

Where is your company headquartered?

Please list the countries where your factories are located.

How many full-time employees does your company currently have that are employed in your lab-related manufacturing activities?

Manufacturer Region Sales Breakdown

Please provide the percentage of your company's laboratory product sales for the following regions: (must total 100%)

If you have any comments, please provide them in the box below.

_____ USA

_____ Canada

_____ Central & South America (including Mexico)

_____ Western Europe (including the UK and Ireland)

_____ Eastern Europe (including Russia)

_____ Japan

_____ China

_____ India

_____ Rest-of-Asia

_____ Middle East

_____ African Continent

Comments:

Manufacturer Market Segment Sales Breakdown

Please provide the percentage of your company's laboratory product sales for the following market segments: (must total 100%)

If you have any comments, please provide them in the box below.

- _____ K-12
- _____ Colleges and universities
- _____ Government
- _____ Pharma, biopharma, & biotech
- _____ Diagnostics & clinical
- _____ CROs/CMOs
- _____ Other

Comments:

Manufacturer Product Types Sales breakdown

Please provide the percentage of your company's 2021 laboratory product sales for the following product types: (must total 100%)

If you have any comments, please provide them in the box below.

- _____ Steel casework, shelving, and tables
- _____ Wood casework, shelving, and tables
- _____ Plastic laminate casework, shelving, and tables
- _____ Polypropylene casework, wall-mounted cabinets, and tables
- _____ Work surfaces
- _____ Fixtures and accessories
- _____ Fume hoods (exhaust and ductless)
- _____ Biological safety cabinets/laminar flow cabinets
- _____ Lab seating
- _____ Lab flooring
- _____ Washers/Dryers, autoclaves
- _____ Other lab furniture and/or enclosures
- _____ Other non-lab furniture and/or enclosure products

Comments:

Manufacturer Project Sizes

Last year (2021), how many projects fell into the following categories?

Up to 25,000 ft² (2,300 m²): _____

25,000 to 100,000 ft² (2,300 to 9,300 m²): _____

More than 100,000 ft² (9,300 m²): _____

Manufacturer Total Project Area

Please estimate the total area of your company's projects for the following years.
Indicate square foot (ft²) or square meters (m²).

	Area	Units	
		Square feet	Square meters
Fiscal year ending	_____	()	()

in 2019:			
Fiscal year ending in 2020:	—	()	()
Fiscal year ending in 2021:	—	()	()
Fiscal year ending in 2022:	—	()	()

Manufacturer Historical Revenues

What were your laboratory product sales revenues in each of the most recently completed fiscal years?
If not US dollars, please indicate currency.

Fiscal year ending in 2019:: _____

Fiscal year ending in 2020:: _____

Fiscal year ending in 2021:: _____

Fiscal year ending in 2022:: _____

Manufacturer Price Increases

Please indicate any price increases or added surcharges for the fiscal years 2020, 2021, and 2022. Also please forecast any planned price increases or surcharges.

Please enter your answer as an average percentage. Your best estimate is fine.

Fiscal year ending in 2019:: _____

Fiscal year ending in 2020:: _____

Fiscal year ending in 2021:: _____

Fiscal year ending in 2022:: _____

Fiscal year ending in 2023 (forecast):: _____

Fiscal year ending in 2024 (forecast):: _____

Manufacturer Price Increases by Product

Eastern Europe (including Russia)	()	()	()	()	()	()
Japan	()	()	()	()	()	()
China	()	()	()	()	()	()
India	()	()	()	()	()	()
Rest-of-Asia	()	()	()	()	()	()
Middle East	()	()	()	()	()	()
African Continent	()	()	()	()	()	()

Manufacturer Regional Trends

With respect to the regions below, what are some of the trends, patterns, regulatory changes, or other interesting scenarios you've noticed that are impacting or may impact the laboratory furniture market?

If you have no direct knowledge for a particular region, please leave blank.

USA: _____

Canada: _____

Central & South America (including Mexico): _____

Western Europe: _____

Eastern Europe: _____

Japan: _____

China: _____

India: _____

Rest-of-Asia: _____

Middle East: _____

African Continent: _____

Manufacturer Market Segment forecast

What is your lab product revenue forecast for the following market segments for the next five (5) years?

	No direct experience in the region to make an assessment	Decrease significantly (>10%)	Decrease moderately (2%–10%)	Little to no change (-2%–2%)	Increase moderately (2%–10%)	Increase significantly (>10%)
K–12	()	()	()	()	()	()
Colleges and universities	()	()	()	()	()	()
Government	()	()	()	()	()	()
Pharma, biopharma, and biotech	()	()	()	()	()	()
CROs/CMOs	()	()	()	()	()	()
Diagnostics and clinical	()	()	()	()	()	()
Other	()	()	()	()	()	()

Comments

Threat Ranking

**Please rank the following from biggest concern/worry/threat to least with respect to your company.
If you have another concern that is not captured by the list below, please use the 'comments' box below to tell us.**

- _____ COVID-19 (Coronavirus)
- _____ Geopolitical issues (e.g., conflict in Ukraine)
- _____ Tariffs, trade disputes, or trade deals
- _____ Increased competition
- _____ Supply chain issues

- _____ Currency fluctuations
- _____ High energy prices
- _____ Global recession or a possibility of a recession
- _____ Inflation
- _____ Staffing

Comments

(untitled)

What are the POSITIVE economic factors or trends that have shaped and will continue shaping your addressable market this year (2022)?

Select up to four (4) forces that affect your business.

- Increased oil prices
- Increased production (e.g., energy)

- Government economic policies
 - New plant construction
 - Delayed projects now moving forward
 - Workload increasing
 - Increased regulation
 - Expanded offerings/new products
 - New markets
 - Currency effects
 - Other, please specify
 - Challenges reaching customers
 - Customer budget constraints
 - Other, please specify: _____
-

(untitled)

What are the NEGATIVE economic factors or trends that have shaped and will continue shaping your addressable market (2022)?

Select the top four (4) forces that affect your business.

- COVID-19 pandemic
- Supply chain

- Geopolitical issues (e.g., conflict in Ukraine)
 - Low oil prices
 - Low production (e.g., energy demand)
 - Workforce, staffing
 - Government economic policies
 - Uncertainty of in-person customer service
 - Low profit margins on products
 - Increased competition
 - Currency effects
 - Challenges reaching customers
 - Customer budget constraints
 - Other, please specify: _____
-

Impact of Current Issues

How will current issues such as supply chain, shipping, logistics, energy, staffing, etc. impact your lab business throughout the next 2 years?

Additional Comments

If you have any other comments or suggestions, please use the text box below to tell us.

Thank You!

Thank you for taking our survey. As we indicated, your responses will remain confidential and will not be shared with anyone.

2022 SEFA Market Survey – Advisory Board - Associates

Intro Page

Top-Down Analytics (TDA), in collaboration with the Scientific Equipment and Furniture Association (SEFA), is conducting a laboratory furniture and enclosures global market study. The results of this survey will become an integral part of a market report, which will be made available free of charge to all current SEFA members in good standing. Please be assured that TDA has agreed your responses will be completely confidential, and all data will be scrubbed from any company-identifying information and used and presented only in aggregate. The raw results of the survey will not be shared with anyone, including SEFA. We thank you for helping us in this important effort to present the industry with the most accurate market intelligence data, which everyone will benefit from.

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Basic Demographics

Page exit logic: Skip / Disqualify Logic**IF:** #5 Question "**Which best describes your company?**" is one of the following answers ("Lab planner, architect/engineer and/or consultant") **THEN:** Jump to [page 14 - Planner Project Sizes](#)

What is the name of your company?

Where is your company headquartered?

Please list the countries where your offices are located.

How many full-time employees does your company currently have that are employed in your lab-related activities?

Project Sizes

Logic: Hidden unless: #5 Question "Which best describes your company?" is one of the following answers ("Lab planner, architect/engineer and/or consultant")

For the most recently completed fiscal year, how many laboratory projects fell into the following categories?

Up to 25,000 ft² (2,300 m²): _____

25,000 to 100,000 ft² (2,300 to 9,300 m²): _____

More than 100,000 ft² (9,300 m²): _____

Project Area

Logic: Hidden unless: #5 Question "Which best describes your company?" is one of the following answers ("Lab planner, architect/engineer and/or consultant")

Please estimate the total area of your company's laboratory projects for the following years.
Indicate square foot (ft²) or square meters (m²).

	Area	Units	
		Square	Square

		feet	meters
Fiscal year ending in 2019:	—	()	()
Fiscal year ending in 2020:	—	()	()
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Fiscal year ending in 2022:	—	()	()

Historical Revenues

Logic: Hidden unless: #5 Question "Which best describes your company?" is one of the following answers ("Lab planner, architect/engineer and/or consultant")

What were your laboratory projects sales revenues in each of the most recently completed fiscal years?
If not US dollars, please indicate currency.

Fiscal year ending in 2019:: _____

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Historical Revenues

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What were your laboratory project sales revenues in each of the most recently completed fiscal years?
If not US dollars, please indicate currency.

	Less than \$1M	\$1M to \$5M	\$6M to \$10M	\$11M to \$15M	\$16M to \$25M	\$26M to \$50M	\$51M to \$100M	\$101M to \$250M	More than \$250M
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Regional Trends

Logic: Hidden unless: #5 Question "Which best describes your company?" is one of the following answers ("Lab planner, architect/engineer and/or consultant")

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Market Segment Forecast

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(untitled)

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