

# Customer Survey

2025



## Dear valued business partner

We are pleased to present the sixth edition of our annual customer survey, offering valuable insights into the latest trends and challenges across the industries BARTEC serves.

The survey is based on approximately 3,000 in-depth interviews with key customers from around 70 countries, ensuring a robust and representative dataset across the EX industry.

In today's dynamic business environment, understanding economic conditions is essential. The survey results not only provide insight into our customers' needs and priorities but also help us refine our solutions as a trusted partner. Our goal is to deliver tailored solutions that align with market demands and best support you in your industry. This analysis enables us to continuously optimize our approach and enhance our solutions as both a supplier and service provider.

We believe the survey findings will empower you to make informed decisions and position your company for success in an evolving marketplace.

Should you have any questions or require further assistance, our dedicated BARTEC sales representatives are always available to support you.

We wish you and your company continued success.

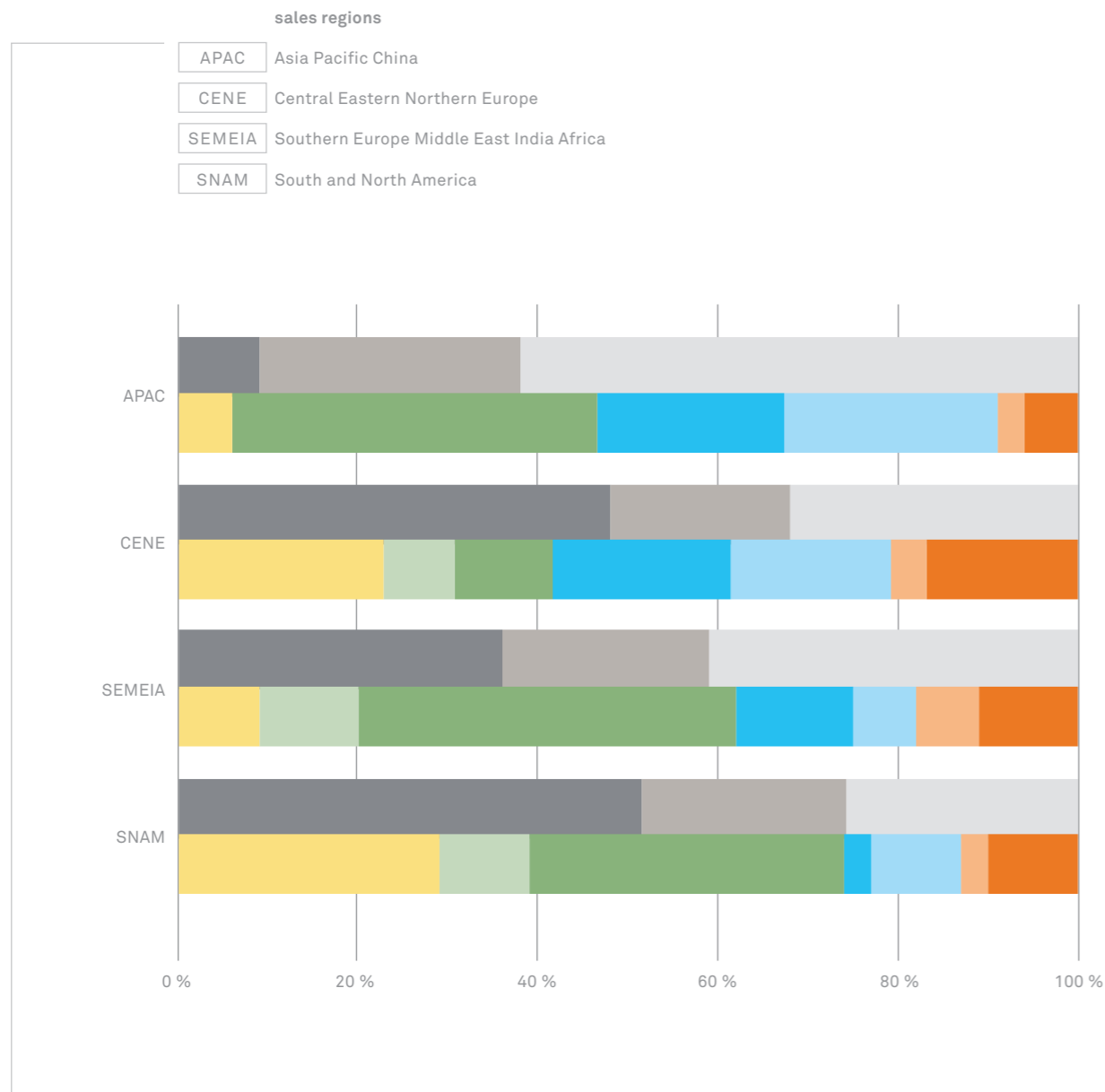
With kind regards

Your BARTEC Team

### Major trends and takeaways from the interviews conducted:

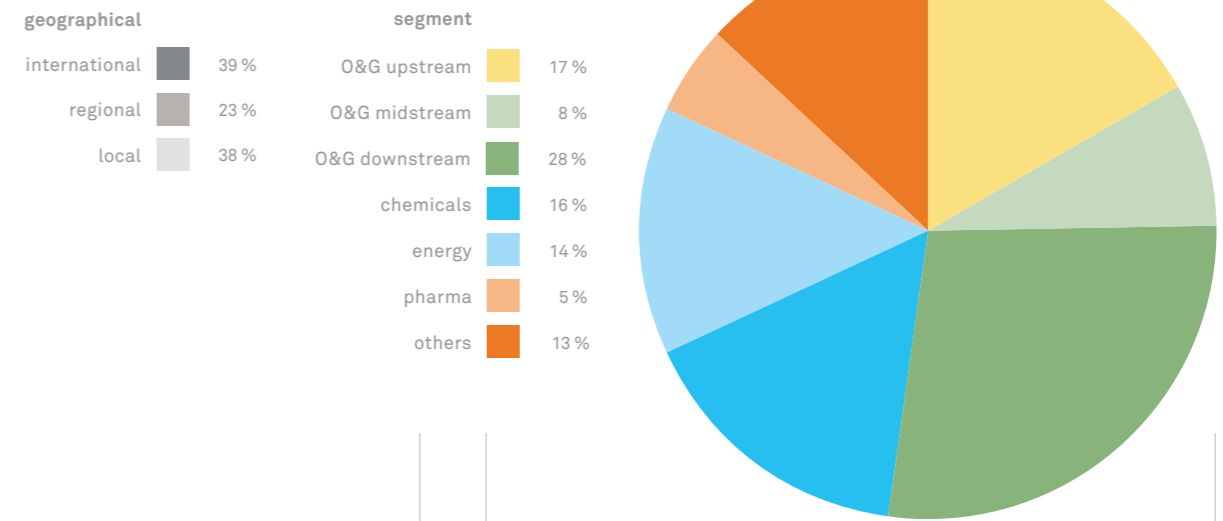
- Overall, market sentiment has improved for the fourth consecutive year, with customers expecting revenue growth across all segments this year.
- Nearly 50% of surveyed customers operate in non-O&G sectors, underscoring the increasing demand for innovative Ex solutions across a variety of industries.
- 93% of survey participants would (very) likely recommend BARTEC's products and solutions, reinforcing our position as a leading expert and trusted partner for hazardous area solutions, providing safety that is trusted worldwide.
- Increased sourcing costs and supply chain disruptions remain the biggest challenges in the market. In challenging times, you have an excellent partner in BARTEC that protects customers' assets and enables them to achieve better results.
- Following the successful integration of Extronics, BARTEC now offers the broadest connectivity portfolio for hazardous areas on the market, strengthening our international competitiveness. Together with our customers and partners, we are shaping the digital transformation of the hazardous area sector.

## Geographical and segment activity of study participants



BY SALES REGION

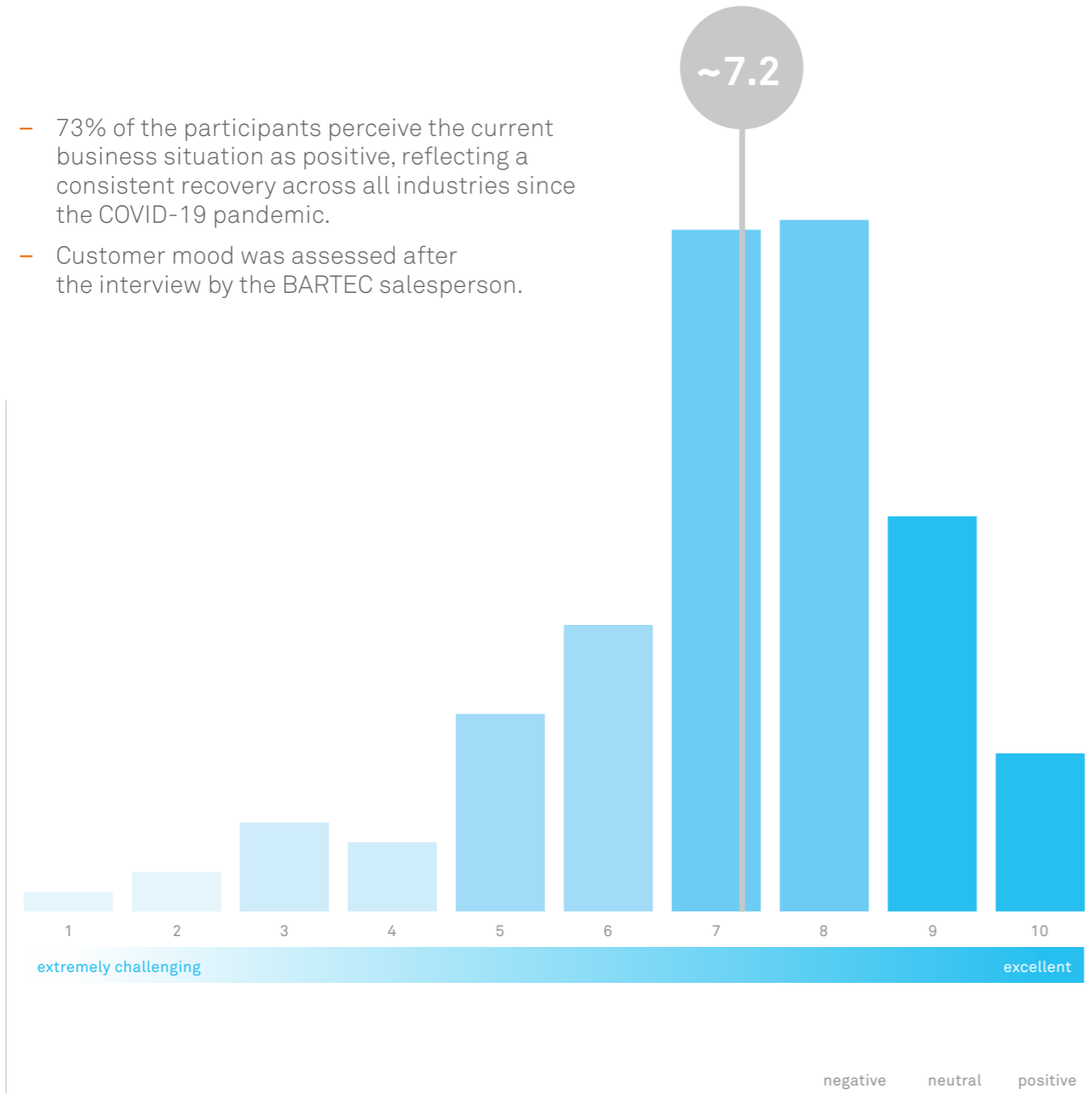
- Since the first survey in 2020, customers from 68 countries have been surveyed, in most of which BARTEC is represented by its own subsidiary.
- BARTEC continues to diversify into non-oil and gas industries, with approximately 50% of the surveyed customers operating in these sectors.
- The share of customers operating exclusively on a local level is decreasing, now at 38%.



GLOBALLY

## Current market situation

- 73% of the participants perceive the current business situation as positive, reflecting a consistent recovery across all industries since the COVID-19 pandemic.
- Customer mood was assessed after the interview by the BARTEC salesperson.



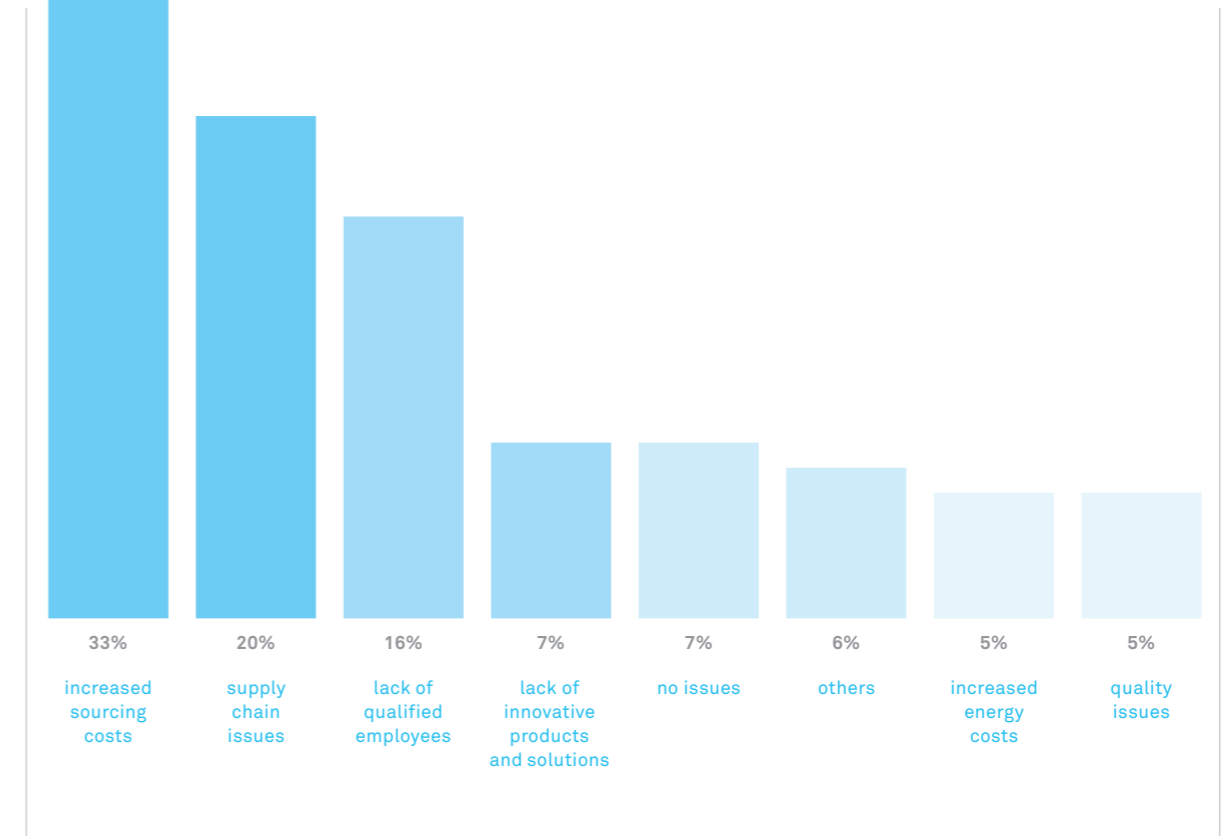
GENERAL MOOD OF CUSTOMERS IN 2025

	negative		neutral		positive		
O&G upstream	4%	5%	22%	14%	73%	81%	→
O&G midstream	0%	8%	14%	36%	86%	56%	↑
O&G downstream	9%	6%	19%	21%	72%	73%	→
chemicals	7%	5%	17%	28%	76%	67%	→
energy	3%	9%	24%	14%	73%	77%	→
pharmaceuticals	0%	18%	25%	27%	75%	55%	↑
others	6%	18%	29%	21%	65%	61%	↗

\* value as of 2024

## Current market challenges

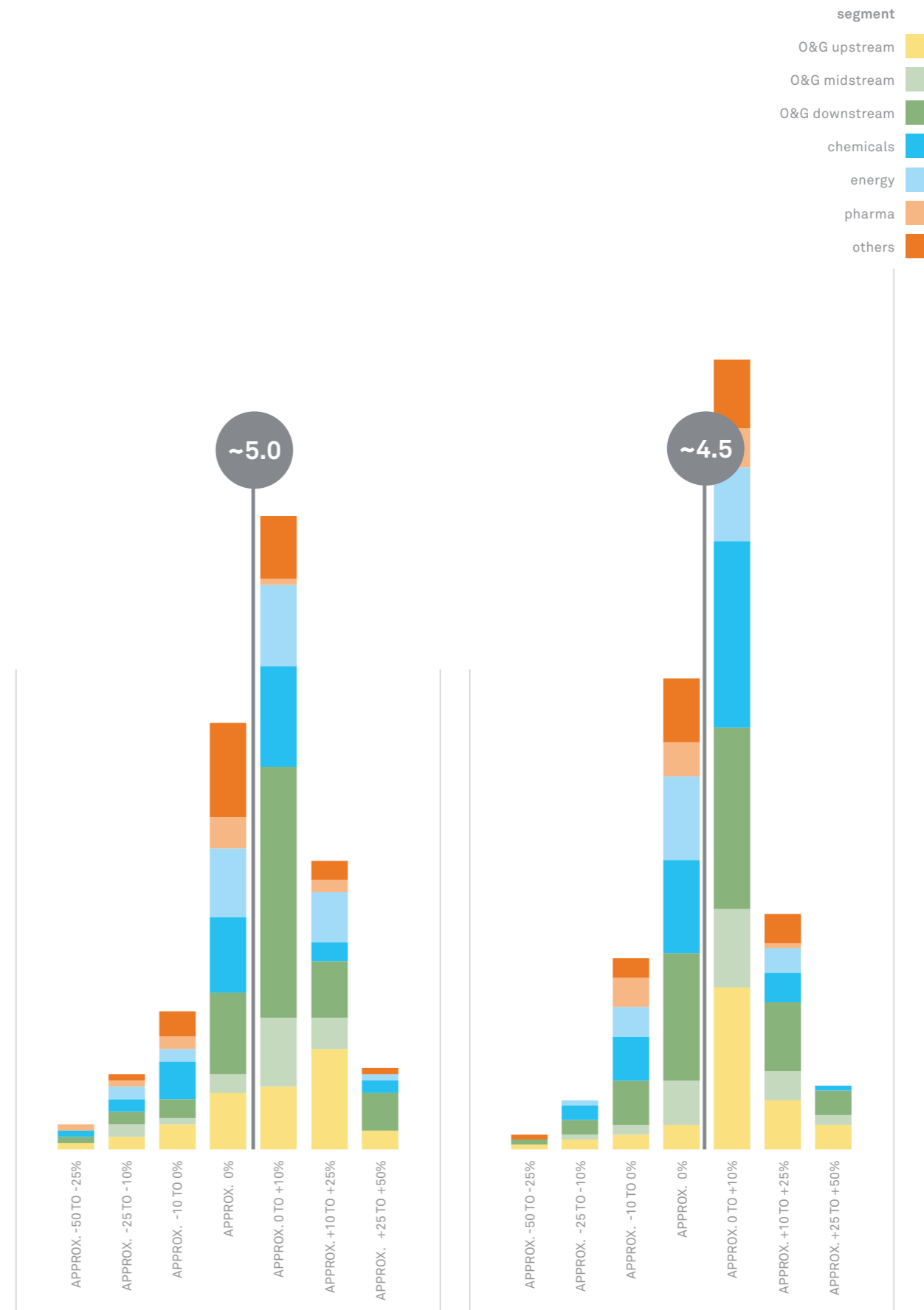
- The biggest challenge for customers surveyed is increased sourcing costs (33%), followed by supply chain disruptions (20%) and a shortage of qualified employees (16%).



WHAT IS CURRENTLY THE BIGGEST CHALLENGE?

## Customers' revenue is expected to increase

- The expected average revenue growth for the calendar year 2025 is +5.0% compared to CY 2024 (CY 2024: +4.5%).
- Interviewed customers in SNAM are the most optimistic, expecting an average revenue increase of 14.9% for 2025.



EXPECTED REVENUE DEVELOPMENT FOR CY 2025 COMPARED TO CY 2024

EXPECTED REVENUE DEVELOPMENT FOR CY 2024 COMPARED TO CY 2023



# BARTEC's Future is Global and Digital

Interview with CEO Dr Martin Schefter on the Development of BARTEC as a Global Company with Strong Roots in Europe

**You have been with BARTEC since 2017 – what was your vision for the company when you first became CEO?**

From the beginning, I saw the potential for BARTEC to become an innovation leader. By 2017, the financial restructuring was largely complete, and I aimed to build the company in a way that would allow it to fully realize its potential. Unfortunately, the crises of the time set us back several times on that path. All the more gratifying is that today we are once again well-positioned and have the best conditions to become the digital industry leader in the Ex sector.

**How has BARTEC developed since then?**

A crucial step was developing a DNA for BARTEC that enables change. We have become younger and more dynamic, building a management team with a healthy mix of young talents and experienced leaders who are united behind this vision.

Over the years, BARTEC has grown significantly through various acquisitions, but these were not sufficiently integrated. Integration was an important measure to allow us to operate cohesively and consistently as one company. Of course, BARTEC's success story can only be written together with our employees. The 'ONE BARTEC' mission statement has helped us develop a shared spirit and live our values of performance, customer

centricity, and dedication across all locations. We are proud that our over 1,000 employees in around 50 branches are increasingly creating synergies and celebrating successes together.

Another significant milestone for BARTEC is the clear divisionalization of the company. By reorganizing the value chain under the leadership of five business units, we can further enhance efficiency and cohesion within the company. Each business unit will be responsible for its own profits in the future, and cooperate closely with the sales units in our four regions. This creates a clear structure of responsibility and enables the business units to respond more quickly and flexibly to market changes. By bringing everyone together regularly, we strengthen mutual support beyond the business units and make BARTEC more resilient.

**Where do you see BARTEC in five years?**

In times of uncertainty and transformation, safety plays a crucial role. The current market situation offers significant opportunities to grow in alternative energy sectors and we are committed to support our clients with the safe implementation of new technologies. In five years, I see BARTEC as a global player leading the digital transformation in the Ex sector. We will continue to invest in innovative technologies and the digitization of our processes and products.

**Our goal is to establish BARTEC as a leading player in the digital transformation of the Ex sector.**

While we continue to nurture our customer base in the European home markets and support the safe implementation of sustainable energy forms, we will also expand our international markets. The USA, in particular, is now a significant revenue driver. When you look at BARTEC's development, our expertise in specialized safety solutions stands out. With the Customize-to-Order approach, we continue to focus on proactively anticipating the individual needs of our customers and offering them tailored solutions.

However, through a higher degree of standardization and automation, we can achieve much greater production efficiency. With our strategy programme, the 'Full Potential Plan' and a clear digital focus, BARTEC is well-positioned for a profitable and safe future.

# BARTEC

brand reputation

92%

of customers surveyed confirm that our products and solutions meet or exceed expectations

93%

of customers surveyed would (very) likely recommend our products and solutions

59%

of customers surveyed first learn about us from word-of-mouth or recommendations



# Trusted Partner in All Safety Matters

BARTEC's innovative products and solutions are found in many different areas of a complete industrial facility, to keep our daily lives running smoothly.

Wherever hazardous substances such as flammable gases, vapors, mists, or dusts are present, the components and system solutions developed by BARTEC prevent explosions and protect the safety of both people and the environment.

1



## Lighting and Electrical Infrastructure

Our specialized solutions for lighting and electrical infrastructure bring light to hazardous areas.



## Wireless Connectivity

We offer a comprehensive range of explosion-proof solutions for all types of wireless networks, antennas, and IIoT sensors for use in hazardous areas.

2



## Automation and Machine Control

Automation and machine control in hazardous areas are among our most significant engineering fields.



## Mobile Worker

Mobile work in hazardous areas is a key focus of our comprehensive solutions offering.

3



## Trace Heating Solutions

BARTEC's heat tracing solutions protect supply lines, transportation systems, and production processes across various industries, ensuring safety, reliability, and efficiency.



## Energy Distribution

BARTEC designs and manufactures customized solutions for industrial energy distribution specifically in hazardous areas.

4



## Analysis and Measurement Technology

We offer a comprehensive range of solutions for analytical and measurement technology, including online analyzers, sample conditioning systems, analyzer shelters, and on-truck systems.



## Smart Factories

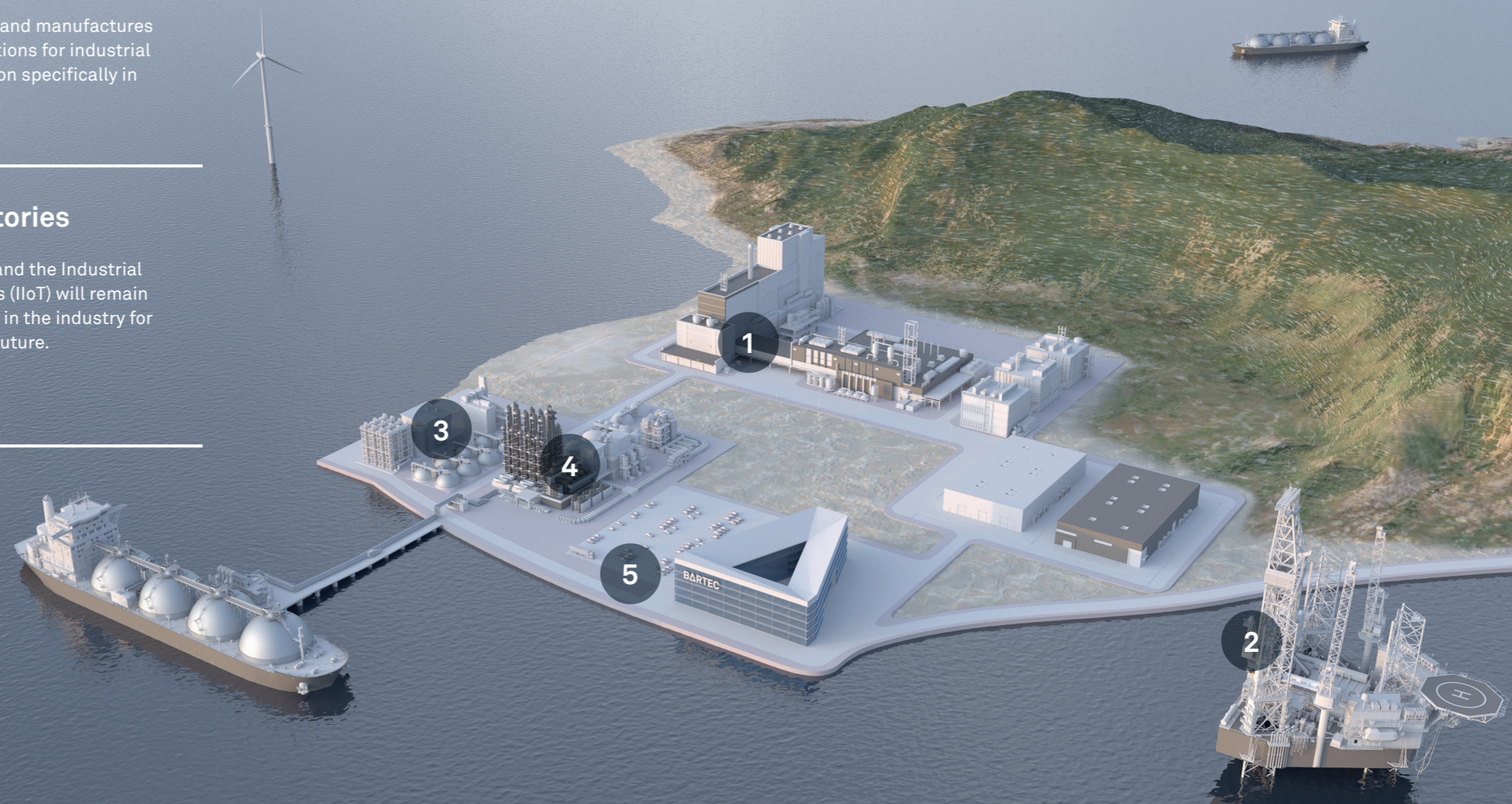
Smart factories and the Industrial Internet of Things (IIoT) will remain a dominant topic in the industry for the foreseeable future.

5



## Road Transport

We deliver approved and normed monitoring, securing, and fiscal measuring solutions for the safe and efficient transportation and distribution of liquids and gases.





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