IC Market Tracking®
Elastic Floor Coverings in Europe 2016

Western Europe
- Germany
- Austria
- Switzerland
- United Kingdom
- Spain

Italy
- France
- Belgium
- Netherlands

Eastern Europe:
- Poland
- Russia
- Czech Rep.

Hungary
- Slovakia
- Turkey
Your Benefits at a Glance

- Overview of the development of the total market and the individual Segments.

- Market Forecasts for all product segments and regions for the upcoming three years, based on our econometric models.

- Awareness of Market Position and development during the last two years, in comparison with major competitors and with respect to:
  - Total Market
  - Application
  - Product Groups
  - Distribution Channels

- Information about the most important Factors of Influence

- Graphic Presentation of the results facilitates the development of your own strategies.
For each segment the total market and market shares of the top players for 2015 and 2016 (half year) and forecasts for the next three years are available in the study.
## Definition and Demarcation

### Application

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care</td>
<td>Clinics, hospitals, psychiatric hospitals, care and retirement homes, veterinary hospitals, rehabilitation facilities, etc.</td>
</tr>
<tr>
<td>Culture/Education</td>
<td>Schools, universities, kindergarten, museums, daycare facilities, etc.</td>
</tr>
<tr>
<td>Public</td>
<td>Office and administration buildings, jails, barracks, etc.</td>
</tr>
<tr>
<td>Sports</td>
<td>Sports halls, fitness centres, changing rooms, etc.</td>
</tr>
<tr>
<td>Trade/Shopfitting</td>
<td>Retail, boutiques, retail chains, shopping malls, supermarkets etc.</td>
</tr>
<tr>
<td>Hotel/Gastronomy</td>
<td>Hotels, restaurants, taverns, theatres, cinemas, etc.</td>
</tr>
<tr>
<td>Industry</td>
<td>All kind of industrial buildings (producing industry, pharmaceutical industry, etc.)</td>
</tr>
<tr>
<td>Residential</td>
<td>1-family, 2-family dwellings and flats.</td>
</tr>
<tr>
<td>Transportation</td>
<td>Aviation, Trains, Cars, Marine…</td>
</tr>
</tbody>
</table>
## Definition and Demarcation

### Product Groups

<table>
<thead>
<tr>
<th>Product Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linoleum</td>
<td>Consists of different raw materials (partly of renewable resources). It is persistent, resistant, hygienic as well as antibacterial.</td>
</tr>
<tr>
<td>Homogeneous Vinyl</td>
<td>Consist of only one material.</td>
</tr>
<tr>
<td>Heterogeneous Vinyl</td>
<td>Consist of different materials and are multilayer.</td>
</tr>
<tr>
<td>Synthetic Rubber</td>
<td>Rubber floor coverings are summed up as 'elastomer floor coverings’ and consist of synthetic rubber. They have a high abrasion resistance.</td>
</tr>
<tr>
<td>Cushioned Vinyl</td>
<td>„Cushioned Vinyls“ mean „foamed PVC floor coverings“. Those CV coverings are heterogeneous and therefore multilayer.</td>
</tr>
<tr>
<td>LVTs</td>
<td>Luxury Vinyl Tiles are heterogeneous PVC coverings but differentiate themselves from original PVC coverings by their structure.</td>
</tr>
</tbody>
</table>

### Distribution Channel

<table>
<thead>
<tr>
<th>Channel</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale</td>
<td>Wholesalers purchase huge amounts of products from the producer to resell them to further processors or retailers.</td>
</tr>
<tr>
<td>Specialist retailers/Installers</td>
<td>Specialist retailers have a small, but deep and closed assortment of products (consulting and service), Installers of the produced floor coverings.</td>
</tr>
<tr>
<td>DIY-Market</td>
<td>Do-it-yourself store and home improvement stores</td>
</tr>
</tbody>
</table>
Definition and Demarcation

Product Groups

- Linoleum
- Homogeneous Vinyl
- Heterogeneous Vinyl
- Synthetic Rubber
- Cushioned Vinyl
- LVTs
- PVC/Vinyl on HDF-Board

Distribution Channel

- Wholesale
- Specialist retailers/Installers
- DIY-Market
- Direct

Turnover is shown in 1,000 Euros. Values are always depicted after tax (no list prices), including any discounts. Quantity in 1,000 m².

Linoleum consists of different raw materials (partly of renewable resources). It is persistent, resistant, hygienic as well as antibacterial.

Homogeneous Vinyl/PVC floor coverings consist of only one material.

Heterogeneous Vinyl/PVC floor coverings consist of different materials and are multilayer.

Rubber floor coverings are summed up as ‘elastomer floor coverings’ and consist of synthetic rubber. They have a high abrasion resistance.

“Cushioned Vinyl’s” mean „foamed PVC floor coverings“. Those CV coverings are heterogeneous and therefore multilayer.

Luxury Vinyl Tiles are heterogeneous PVC coverings but differentiate themselves from original PVC coverings by their structure.

PVC/Vinyl on HDF-Carrier Boards (high density fibreboard) denotes flooring, on which PVC/Vinyl is applied on high density fibreboards.

Wholesalers purchase huge amounts of products from the producer to resell them to further processors or retailers.

Specialist retailers have a small, but deep and closed assortment of products (consulting and service), Installers of the produced floor coverings.

Do-it-yourself store and home improvement stores.

Direct sale to the end-consumer.
Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM).

The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Sales are segmented by the first distribution partner.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

Manufacturer
- Sell-In Data

Distributor

Dealer
- Company Databases
- Balance Sheets, Banks
- etc.

Database

Market Influencing Indicators

Market Development

Forecast Model

Experts
- Qualitative Research
- Expert Interviews
- Delphi-Method

Cross-Check of Data

Total Market

Forecast

Market Share
Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

- **Approach Sell-In**
  - Manufacturer
  - TOP 10
  - All Others
  - Market Shares

- **Approach Sell-Out**
  - Experts
  - £ Total Market
  - Manufacturer
  - Dealer
  - Buyer
  - Customer

TOP DOWN

BOTTOM UP
The IC Market Tracking® is modularly built and consists of the following sections:

- **The Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.

- **The Executive Summary** gives a short overview of the results of the study and analyses key facts.

- As an introduction key factors influencing the market are analyzed in the **Economic Environment**: You will find the most important data on main economic indicators, etc.

- **The Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. A forecast for the next years is an essential part of this analysis.

- **The Competition Analysis** shows in detail the development of the top companies in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.

- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.
How is the market environment developing?

- Overview of the development of relevant micro- and macro economical market influencing factors.
- This Sample Chart shows fictive figures.
Total Market and Development

- **Presentation of Total Market & Forecasts** for the next three years.
- **Market segmentation** in different customer segments.
- This Sample Chart shows fictive figures.

### Stable Increase is Expected for Upcoming Years

*Country X: Total Market of Elastic Floor Coverings 2011 – 2019f, Quantity in 1,000 m², Value in Mio. Euro*

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantity in 1,000 m²</th>
<th>Value in Mio €</th>
<th>Annual Change in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>2,007</td>
<td>427</td>
<td>7.5%</td>
</tr>
<tr>
<td>2012</td>
<td>2,133</td>
<td>579</td>
<td>-6.3%</td>
</tr>
<tr>
<td>2013</td>
<td>2,228</td>
<td>407</td>
<td>-7.4%</td>
</tr>
<tr>
<td>2014</td>
<td>2,208</td>
<td>400</td>
<td>-6.4%</td>
</tr>
<tr>
<td>2015</td>
<td>2,104</td>
<td>367</td>
<td>-6.6%</td>
</tr>
<tr>
<td>2016e</td>
<td>2,073</td>
<td>310</td>
<td>-6.7%</td>
</tr>
<tr>
<td>2017f</td>
<td>2,152</td>
<td>394</td>
<td>-6.5%</td>
</tr>
<tr>
<td>2018f</td>
<td>2,307</td>
<td>431</td>
<td>3.9%</td>
</tr>
<tr>
<td>2019f</td>
<td>2,437</td>
<td>464</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

**CAGR 15-19f**
- Value: 6.0%
- Quantity: 3.7%
Size and Market Shares of Application Areas

- Presentation of Application Areas and their Market Shares
- Forecast for the next three years
- This Sample Chart shows fictive figures

**Market Analysis & Forecast**

Culture/Education Has Greatest Market Development


- Culture/Education
- Hotel/Gastronomy
- Residential
- Trade/Shop Fitting
- Public
- Industry
- Sport
- Health Care

Market Value 2015 in %

Market Development 1-4.15 in %

© Interconnection 2015
Size and Market Shares of Product Groups

- Presentation of **Product Groups** and their **Market Shares**
- **Forecast** for the next three years
- This Sample Chart shows fictive figures.

### Majority of Others Group is Made up of Cork

*Product Groups: Market for Elastic Floor Coverings 2011-2019f, Quantity in %*

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Synthetic Rubber</td>
<td>21.32%</td>
<td>22.34%</td>
<td>21.84%</td>
<td>22.09%</td>
<td>21.84%</td>
<td>20.88%</td>
<td>20.91%</td>
<td>20.93%</td>
<td></td>
</tr>
<tr>
<td>Polyurethane</td>
<td>3.70%</td>
<td>4.06%</td>
<td>4.22%</td>
<td>4.36%</td>
<td>5.42%</td>
<td>4.36%</td>
<td>4.36%</td>
<td>4.36%</td>
<td></td>
</tr>
<tr>
<td>Heterogeneous Vinyl/PVC</td>
<td>9.90%</td>
<td>10.10%</td>
<td>10.72%</td>
<td>11.10%</td>
<td>11.63%</td>
<td>11.69%</td>
<td>11.71%</td>
<td>11.71%</td>
<td></td>
</tr>
<tr>
<td>Cushioned Vinyl</td>
<td>15.99%</td>
<td>16.10%</td>
<td>17.75%</td>
<td>17.90%</td>
<td>18.20%</td>
<td>18.38%</td>
<td>18.49%</td>
<td>18.51%</td>
<td></td>
</tr>
<tr>
<td>Linoleum</td>
<td>5.53%</td>
<td>4.89%</td>
<td>5.31%</td>
<td>5.15%</td>
<td>5.21%</td>
<td>5.10%</td>
<td>5.05%</td>
<td>5.02%</td>
<td></td>
</tr>
<tr>
<td>LVTs</td>
<td>25.72%</td>
<td>28.97%</td>
<td>26.82%</td>
<td>27.43%</td>
<td>27.55%</td>
<td>27.83%</td>
<td>27.94%</td>
<td>27.97%</td>
<td></td>
</tr>
<tr>
<td>Homogeneous Vinyl/PVC</td>
<td>14.14%</td>
<td>10.44%</td>
<td>12.00%</td>
<td>11.40%</td>
<td>11.65%</td>
<td>11.69%</td>
<td>11.71%</td>
<td>11.71%</td>
<td></td>
</tr>
<tr>
<td>Vinyl/PVC on HDF-carrier board</td>
<td>8.14%</td>
<td>6.76%</td>
<td>7.95%</td>
<td>7.95%</td>
<td>7.65%</td>
<td>7.34%</td>
<td>7.29%</td>
<td>7.27%</td>
<td></td>
</tr>
</tbody>
</table>
Competitor Analysis of the Top 10 companies

- Illustration of the Top 10 companies and their Market Shares
- Which Companies have generated an increase in Market Shares this year?
- This Sample Chart shows fictive figures.
### Pivot Table

- Additionally to the visualised report a Pivot Table will be included.
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

#### How to use Pivot Tables

1. Generally the desired sub-categories (e.g., Technology, ... can be selected with the ordinary drop down menus.

2. If you want to analyse a different category (e.g., Technology), click on the gray field and drag it down to the table.

<table>
<thead>
<tr>
<th>Technology</th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segments</td>
<td>Results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment A</td>
<td>18,592</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment B</td>
<td>8,434</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment C</td>
<td>5,310</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment D</td>
<td>3,290</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment E</td>
<td>1,332</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>36,958</td>
<td></td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Quarter</th>
<th>(All)</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Country</td>
<td>Germany</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brand</td>
<td>(All)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept Price in € (Classes)</td>
<td>(All)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sum - # Technology</th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Segment A</td>
<td>3,290</td>
<td>5,452</td>
<td>7</td>
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<td>Segment B</td>
<td>5,310</td>
<td>8,028</td>
<td>21</td>
</tr>
<tr>
<td>Segment C</td>
<td>8,434</td>
<td>10,784</td>
<td></td>
</tr>
<tr>
<td>Segment D</td>
<td>18,692</td>
<td>14,624</td>
<td>13</td>
</tr>
<tr>
<td>Segment E</td>
<td>1,352</td>
<td>2,229</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>36,958</td>
<td>42,025</td>
<td>47</td>
</tr>
</tbody>
</table>
IC Market Tracking® Elastic Floor Coverings in Europe 2016

### Available Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Germany</th>
<th>Austria</th>
<th>Switzerland</th>
<th>UK</th>
<th>Italy</th>
<th>France</th>
<th>Belgium</th>
<th>Czech Republic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Country</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Issue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Europe Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IC Subscription*</th>
<th>Scale of Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Issue</td>
<td></td>
</tr>
<tr>
<td>€ 26.550,-</td>
<td>€ 7.000 -10%</td>
</tr>
<tr>
<td>€ 2.950,-</td>
<td>€ 10.000 -20%</td>
</tr>
<tr>
<td><strong>IC Subscription</strong></td>
<td><strong>20% PRICE ADVANTAGE</strong></td>
</tr>
</tbody>
</table>

### Prices

**Single Issue**
- Europe Total **: € 26.550,-
- Single Country: € 2.950,-

**IC Subscription**
- Available Countries
  - Germany
  - Austria
  - Switzerland
  - UK
  - Italy
  - France
  - Belgium
  - Netherlands
  - Spain
  - Poland
  - Russia
  - Hungary
  - Slovakia
  - Turkey

**Scale of Discounts**
- € 7.000 -10%
- € 10.000 -20%
- € 14.750 -25%
- € 23.600 -33%
- € 34.400 -40%

* **IC Subscription**: 20% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

**Price taking into account the scale of discount**
Price includes an interactive PDF Document. All prices shown exclude sales tax.
Your Advantages as a Subscription Customer

As a subscription customer you will receive the chosen report automatically each year at a reduced price. Additionally you will benefit from the following benefits:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): 20% price advantage compared to single issue taking into account the scale of discount

- **Annually updated reports** on fixed dates

- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)

- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research

- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request

- **Easy termination**: After 2 issues each subscription can be terminated easily
Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the construction sector.
- Our studies support the leading companies in the determination of targets, definition of marketing strategies, competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in the construction branch.
- Next to market data we offer for the garage door branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also in the implementation of data in actions = in the development of marketing strategies.
If there are any questions please feel free to contact us!

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General Information

Included in the Report
- interactive PDF, Pivot Tables
- Pages (approx.) 70 per country
- Optional: Hard Copy

Price
- Price per Country: 2,950 €
- All Countries: 26,550 €
- Hard Copy: 150 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.

Options of ordering – Fax: +43 1 5854623 30
- Click „Buy Now“ on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

Content of the Market Report

Structure of the Study

Language of the report
English

Introduction, Market Structure & Executive Summary
Definition and demarcation of product groups, regions and methodology; summary of study results

Market Drivers
Key economic factors influencing the market: consumer behaviour, main economic indicators etc.
Import & export statistics

Total Market Analysis
Total market development and forecasts for all market segments in quantity and value by regions, product groups, business segments, customer segments, distribution channels and opening types.

Competitive Analysis
Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

Market Structure

Regions:
Germany, Austria, Switzerland, Italy, France, UK, Belgium, Netherlands, Spain, Poland, Russia, Czech Rep., Hungary, Slovakia, Turkey

Application
Health Care, Culture/Education, Public, Sports, Trade/Shop Fitting, Hotel/Gastronomy, Industry, Residential, Transportation

Product Groups
Linoleum, homogeneous Vinyl/PVC, heterogeneous Vinyl/PVC, Synthetic Rubber, Cushioned Vinyl, LVTs, PVC/Vinyl on HDB-Carrier Boards

Distribution Channel
Wholesale, Specialist retailers/Installers, DIY-Markets, Direct Sale

Methodology

Methodology and Data Sources
The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.

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