



**IC Market Tracking**  
**Special Flooring – Vinyl Sheet Flooring, Wood Plastic Composite, Rigid LVT**  
In Europe 2017

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# Your Benefits at a Glance

- ✓ Interconnection Consulting is offering various flooring studies, updated periodically
- ✓ Possibility of Ad Hoc extensions, research and information available
- ✓ A detailed **representation of the key markets by country and forecasting until 2020 or further** based off of our econometric forecast model.
- ✓ A **competition analysis** containing detailed **market shares** for selected regions in terms of:
  - The total market
  - Product groups
  - Distribution channels
  - Business segments
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.
- ✓ Company profiles for regions, where competition analysis is not available



## Special Flooring Total Market

Austria	Germany	Switzerland	Italy	Luxembourg	Netherlands	Belgium
Finland	Norway	UK	France	Sweden	Spain	Poland
Slovakia	Czech Republic	Hungary				
Russia	Turkey	Others on Demand				



Product Groups	Application Type	Distribution Channel	Business Segment
VSF	Residential	Craftmens Specialists	New Construction
WPC	Non - Residential	DIY	Renovation
Rigid LVT		Direct (Online..etc)	
		Others	

For each segment we can calculate market size (estimated historical development) and prepare forecast (mid to long term) based on popularity and trend development of the given products. We can take in the account perspective of manufacturers, distributors, builders as well as final users. Competition Analysis available for past 2 years for Product Groups category and total market in both - Value and Quantity (sq. m)

# Definition and Demarcation

Turnover in Mio. Euro. Values are always net turnovers (no list prices), including rabats

## Product Groups

VSF

Vinyl Sheet Flooring is new combination of beauty and function, vinyl sheet is a durable and easy-to-clean floor type



WPC

Wood Plastic Composite are composite materials made of wood fiber/wood flour and thermoplastic (includes PE, PP, PVC etc.)



Rigid LVT

Rigid Luxury Vinyl Tile is a new kind of an innovative, waterproof flooring, consists of natural hardwood and stone.



*Examples:*

**Alterna™** is an engineered stone – a grou-table tile that looks like natural stone or ceramic

**Luxe Plank™** is a realistic, wood-look vinyl plank

**Vivero™** is a luxury flooring – true-to-life wood and stone looks and a superior scratch-resistant surface

# Definition and Demarcation

Application
Residential
Non- Residential

Includes single family housing, multiple family housing such as apartments, flats

Refers to all property other than housing, such as office buildings, shopping centres, trade shops, etc.

Business Segment
New Construction
Renovation

Complete New Installation

Restoring or repairing a Pre-existing structure

## Distribution channel

Direct	Indirect
Online	DIY
Company Store/Site Shop	Craftsmen Specialists
Direct to Construction/ Builders/Other Direct	Others

In this study, we are trying to focus on delivery of the special flooring ( wood flooring/ vinyl flooring)products directly to end consumer (e.g the person/company who will have the flooring at its property)

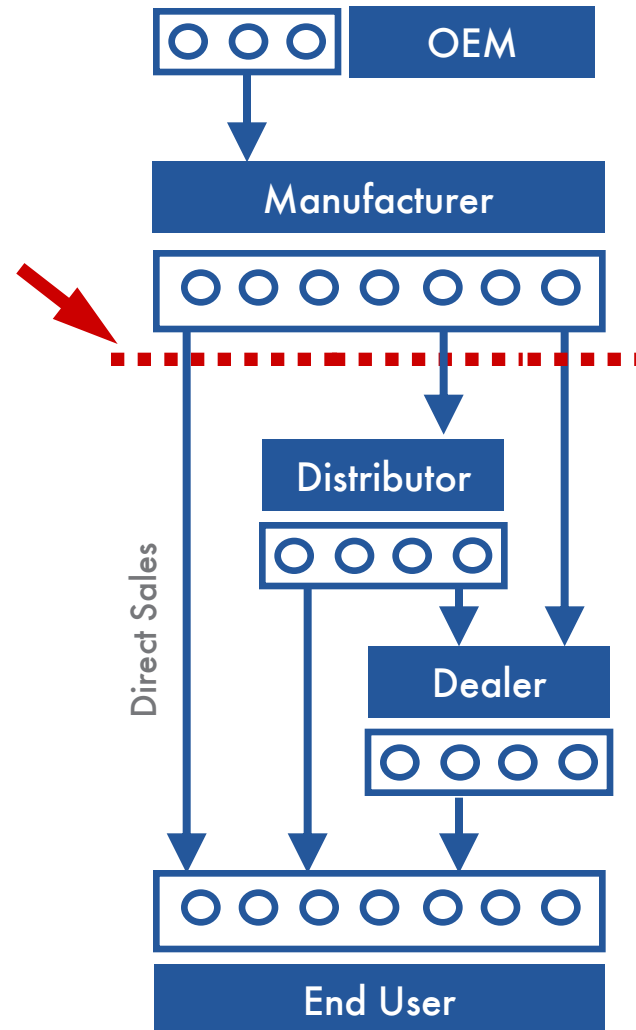
Direct Distribution comprises from Online Sales via webpage, purchases at company stores/site shops and also sales directly to builders or construction companies, which will directly install the floor for their clients.

Indirect Distribution focuses on sales channels, where at least one or more intermediate step/s is/are applied between the manufacturer and final user. Quite frequently, indirect channel is connected with wholesalers or wood trading associations.

# What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



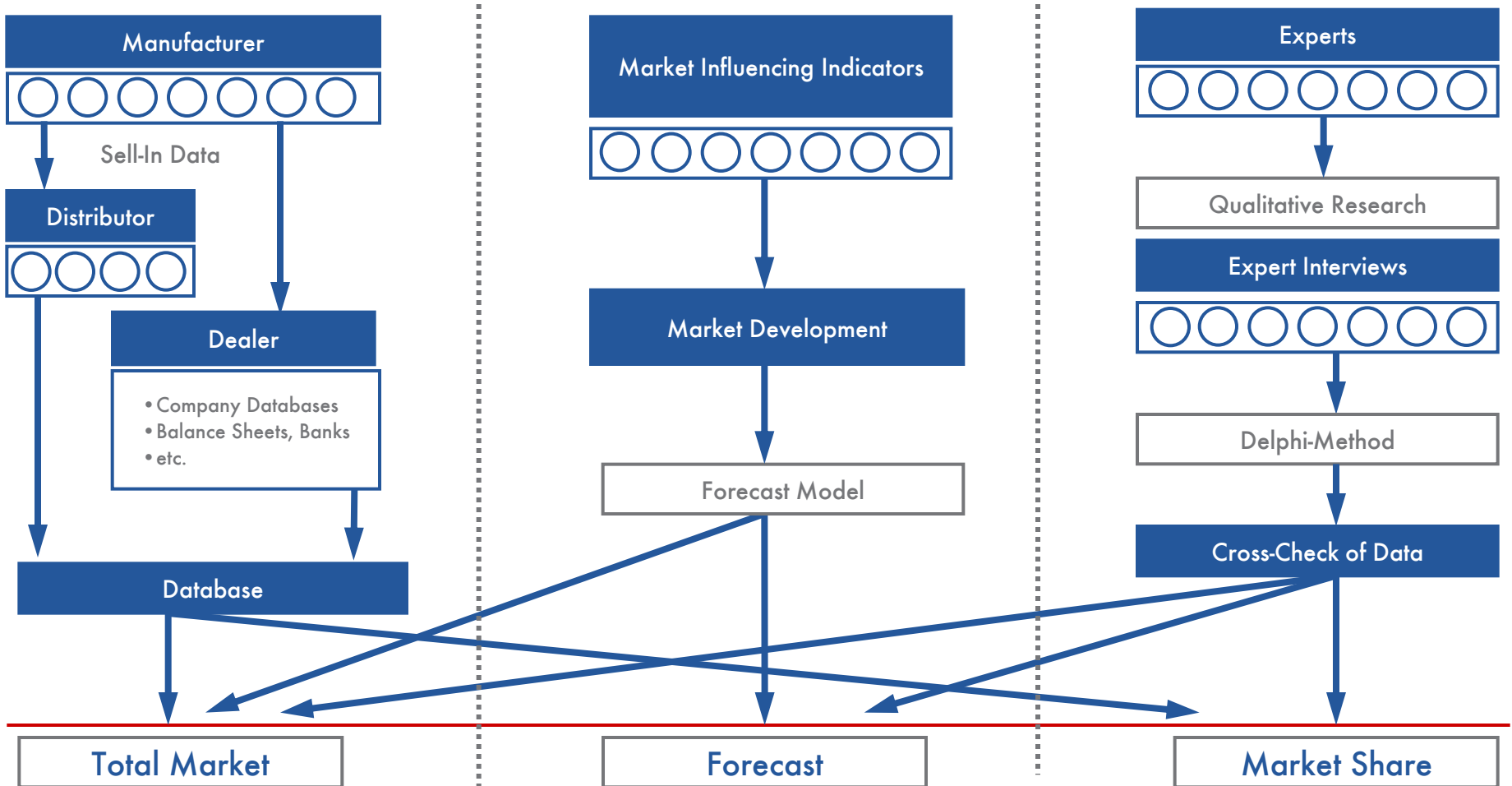
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

# How Do We Conduct Our Research?

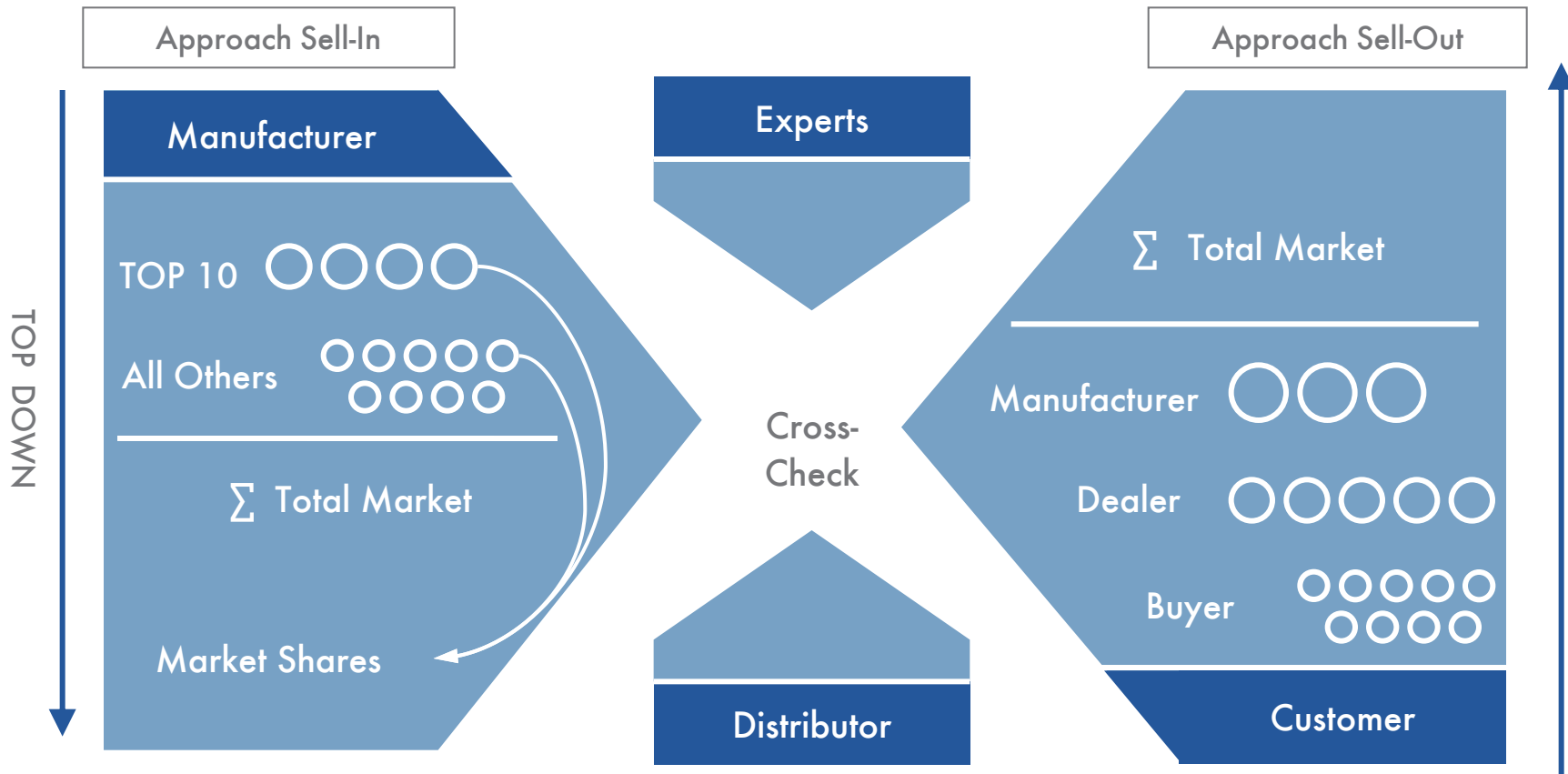
Description Structure of Survey Methodology

Methodology





# How Do we Cross Check the Data?



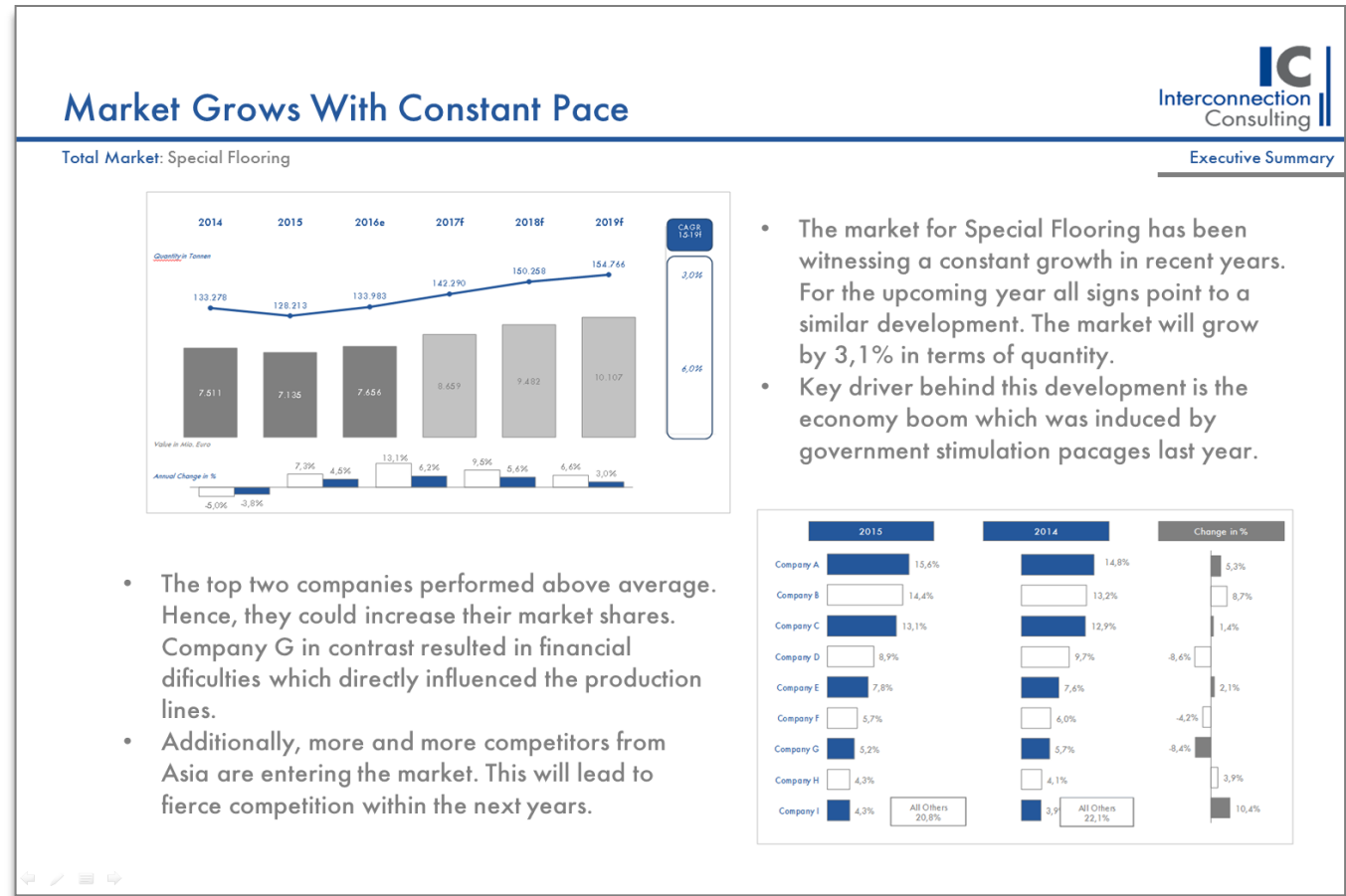
*The IC Market Tracking® is modularly built and consists of the following sections:*

- 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 analysed in the **Economic Environment**: You will find the most important data on consumer behaviour, 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.

# Executive Summary at the Beginning of the Report

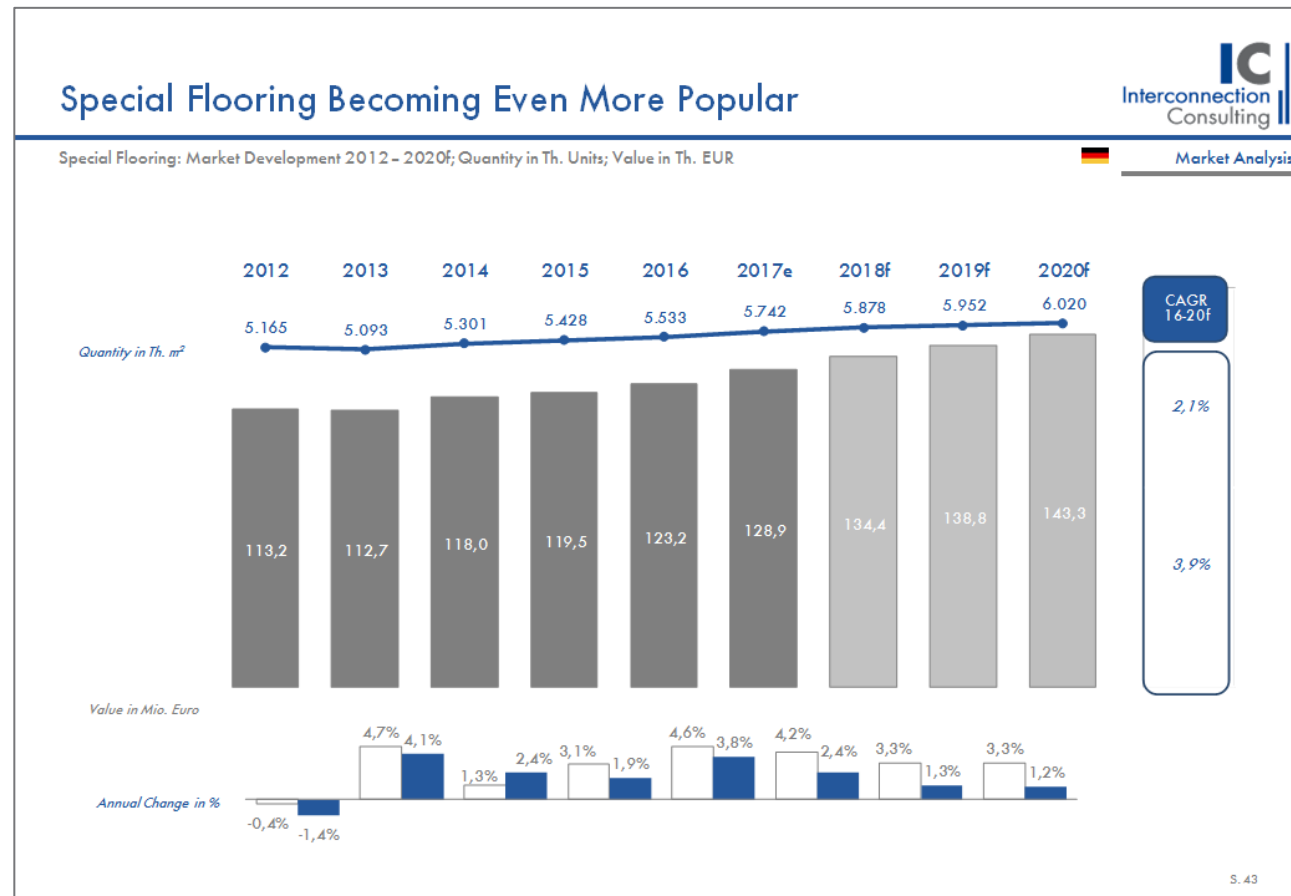
Sample Charts

- The executive summary comprises all relevant information of the report in precise manner. Forecast and
- competition situation is highlighted
- *This chart shows dummy figures.*



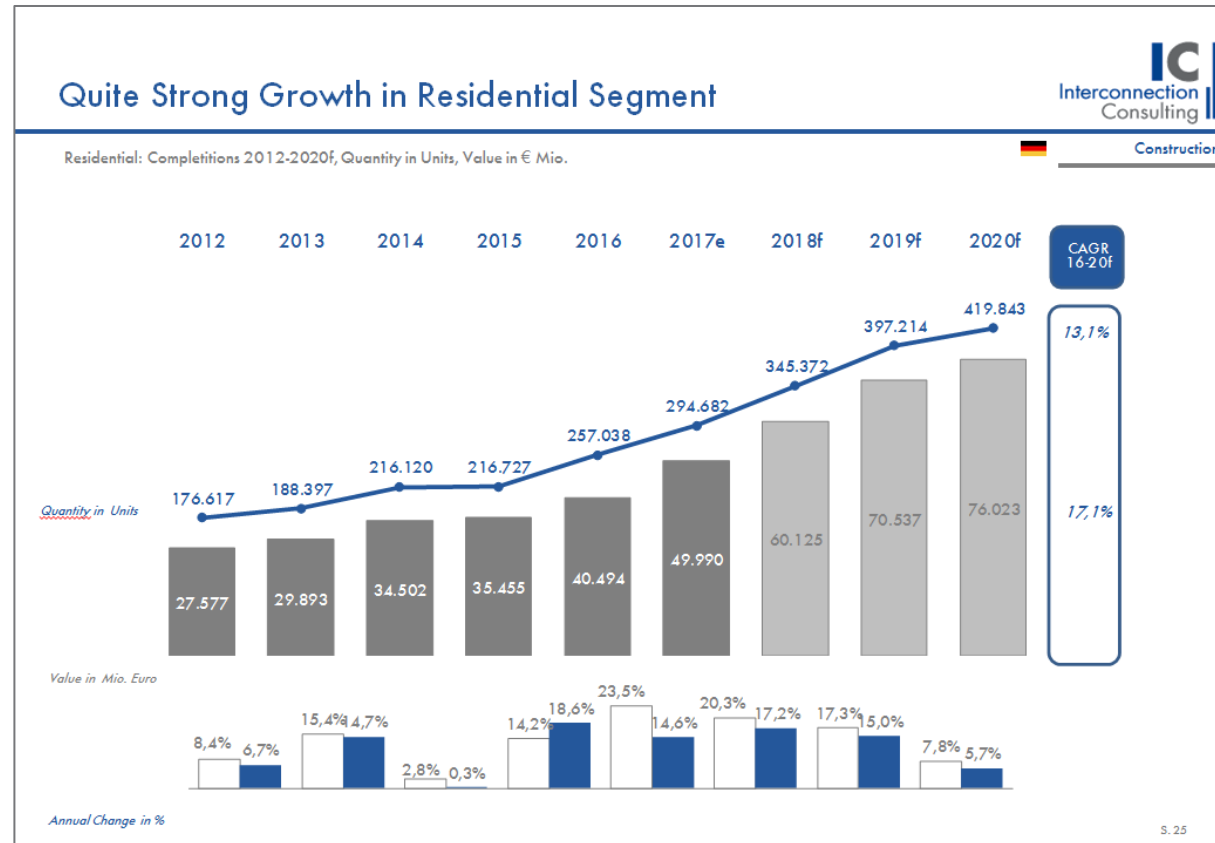
# Market Environment Data of Our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows sample figures.*

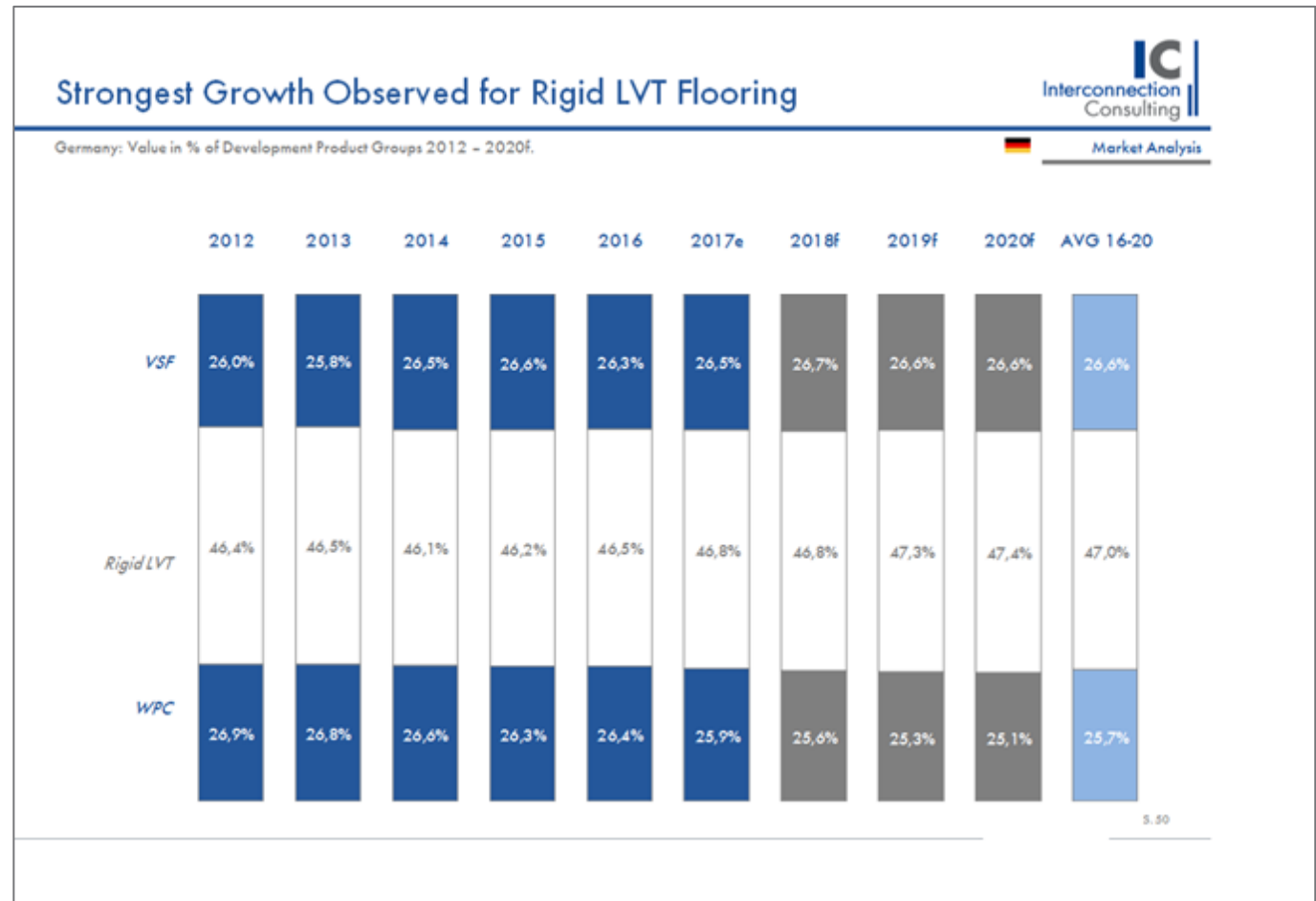


# Total Market Development and Forecast

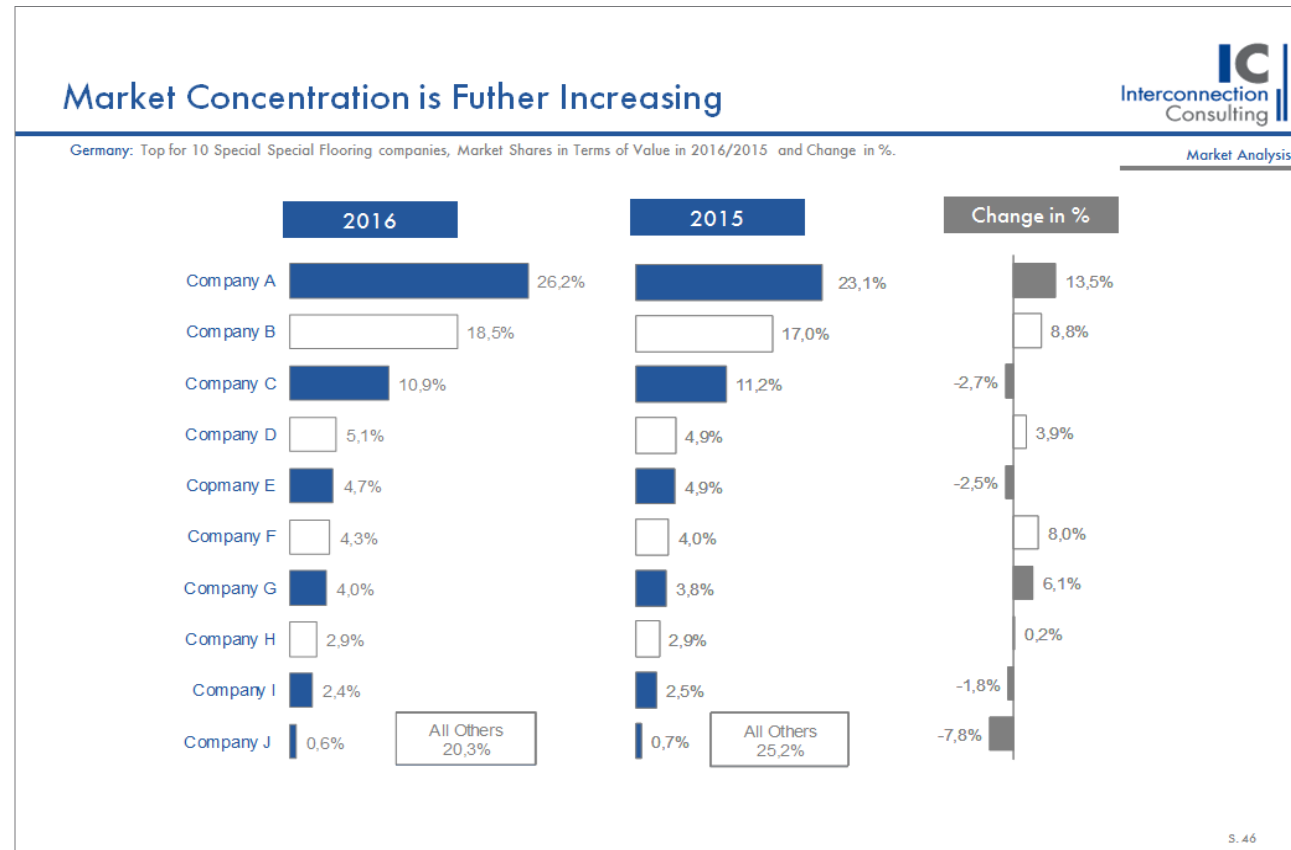
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*



- In addition to the visualized report a Pivot Table will be included.
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

### How to use Pivot Tables

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

Technology	<b>A</b>
Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	
Segments	Results
<b>Segment A</b>	18.592
<b>Segment B</b>	8.434
<b>Segment C</b>	5.310
<b>Segment D</b>	3.290
<b>Segment E</b>	1.332
<b>Total</b>	<b>36.958</b>


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

Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology			
Segments	A	B	C	
<b>Segment A</b>	3.290	5.452		7
<b>Segment B</b>	5.310	8.925		21
<b>Segment C</b>	8.434	10.794		
<b>Segment D</b>	18.592	14.624		13
<b>Segment E</b>	1.332	2.229		6
<b>Total</b>	<b>36.958</b>	<b>42.025</b>		<b>47</b>



# Investment Plan for Your Market Research

	Single Issue	IC Subscription *	Scale of Discounts **		
Single Country	€ 3.950,-		€ 5.000	-5%	
All Countries **	€ 39.990,-		€ 10.000	-20%	
Premium Country	€ 4.450,-		€ 20.000	-33%	
Available Countries	Austria	Germany	Switzerland	Italy	Luxembourg
	Netherlands	Belgium	Finland	Norway	UK
	France	Sweden	Hungary	Poland	Spain
	Slovakia	Czech Republic			
	Russia	Turkey	Others on Demand		

\* **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 Special** (scale of discounts are not applicable, subscription applies)  
 Price includes an interactive PDF Document. All prices shown exclude sales tax

# Your Advantages as a Subscription Customer

Please choose between Subscription\*  
or Single issue

**Subscription\***  **Single Issue**

*As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to 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 flooring industry.
- Our studies support the leading companies in defining targets and marketing strategies, including 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 several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



# Our Market-Intelligence Tools

## Market Analysis




- Market Volume
- Market Shares & Entry
- Competition Analysis

## Distribution Analysis



- Channel Map
- Distribution Matrix
- Margins

## Customer Insight




- Focus Groups
- Buying Motives
- Customer Benefits

## Market Forecasts




- Indicator Models
- Life Cycle Models
- Econometric Analysis

## Brand Analysis




- Brand Scorecards
- Brand - Triangle
- Brand Affinity

## Customer Satisfaction




- Importance/Satisfaction Portfolios
- Customer Loyalty
- Customer Typology

## Price Research



- Price-Sales-Function
- Price-Simulation-Tool
- Optimal Pricing

## Web**verstärker**



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

*"IC is a permanent partner of ours and provides helpful data for decisions."*

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



**If there are any questions please  
do not hesitate to contact us!**

**Interconnection Consulting**

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we show you the way

## Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 80/ per Country
- Optional: Hard Cover: 150 €

## Price

- Single Country: 3.950,-€
- Premium Country: 4.450,-€
- All Countries: 39.990,-€

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, German on Request

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:

Austria, Germany, Switzerland, Italy, Luxembourg, Netherlands, Belgium, Finland, Norway, UK, France, Sweden, Spain, Poland, Slovakia, Czech. Rep., Hungary, Russia, Turkey, Others on Request

#### Product Groups

VSF, WPC, Rigid LVT

#### Application Type

Residential, Non-Residential

#### Distribution Channels

Craftmen Specialists, DIY, Direct, Others

#### Business Segment

New Construction, Renovation

### 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 analysed 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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E-Mail: [office@interconnectionconsulting.com](mailto:office@interconnectionconsulting.com)



Yes, we would like to order the  
**IC Market Tracking® Special Flooring in Europe 2017**  
(Please, print out the order form and mark your desired products)

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<input type="checkbox"/> Norway		3.950,- EUR
<input type="checkbox"/> UK		3.950,- EUR
<input type="checkbox"/> France		3.950,- EUR
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# Order Form

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- We would like to order ..... additional hard copies, each for € 150
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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.

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- Easy termination: After 2 issues each subscription can be terminated easily

## Scale of Discount

From: 5.000,- EUR 5%

From: 10.000,- EUR 20%

From: 20.000,- EUR 33%

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Date

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Signature