

**IC Market Information  
System**  
Exterior Insulation  
Finishing Systems

# Market Data for the EIFS Industry (Annually Updated)



**IC Market Forecast® - Exterior Insulation Finishing Systems** Annual analysis of the EIFS markets in 13 European countries and a further 7 countries in America, Asia, Australia and the Middle East. The studies offer a very detailed overview of the market potential and the market development with forecasts for the overall market as well as individual market segments.

| Data Scope IC Market Forecast® - EIFS                    | Availability | Comment   |
|--|--------------|---|
| Total market development including forecasts per country | ✓            | Time series from 2017-2024f                           |
| Examination of the market for product groups             | ✓            | EPS, mineral wool, others                             |
| Data for the Residential / Non Residential Segment       | ✓            | Market Analysis by absolute figures and in percentage |
| Data about New Construction / Renovation                 | ✓            | Market Analysis by absolute figures and in percentage |
| Data about the Insulation Thickness                      | ✓            | Data for thickness of < 10 cm and > 10 cm             |
| Data about the share of Distribution Channels            | ✓            | Market Analysis by absolute figures and in percentage |
| Online-Access to all Data                                | ✓            | Management Information System Tableau                 |

# What Do You Get - Your Benefits at a Glance

## Presentation of the Data and Deliverables

### Market Intelligence Tool Access and Deliverables



#### ONLINE-COCKPITS

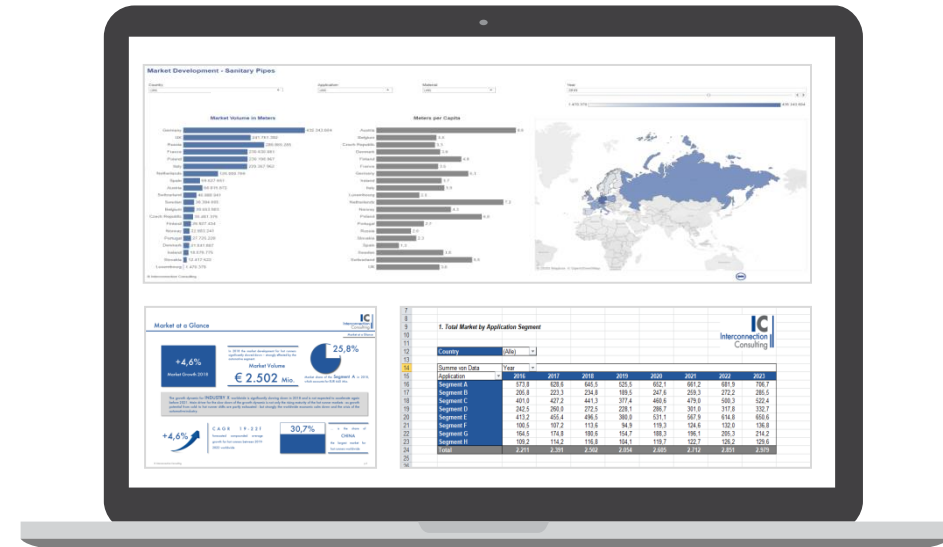
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

#### EXECUTIVE REPORTS

- Executive report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts already integrated within Tableau

#### RAW DATA -TABLES

- Downloadable tables from MIS as xls. cvs. jpg. or other formats for your own integration
  - Graphs
  - Raw Data



### Market Intelligence Tool and Reports



Online Dashboards

Executive Reports

Pivot Tables

# Market Structure

## Detailed Analysis of the Markets and Individual Segments

|         |         |                |              |         |                      |        |
|---------|---------|----------------|--------------|---------|----------------------|--------|
| Austria | Germany | France         | Italy        | Benelux | Spain                | UK     |
| Sweden  | Poland  | Czech Republic | Ukraine      | Russia  | Romania              | Turkey |
| USA     | China   | Australia      | Saudi Arabia | Qatar   | United Arab Emirates |        |

### Market Structure

| Product Groups | Finish Coat | Insulation Thickness | Customer Segments | Business Segments | Distribution Channels |
|----------------|-------------|----------------------|-------------------|-------------------|-----------------------|
| EPS            | Plaster     | < 10 cm              | Residential       | New Construction  | Direct                |
| Mineral Wool   | Others      | > 10 cm              | Non Residential   | Renovation        | Indirect              |
| Others         |             |                      |                   |                   |                       |

# Market Structure - Interpretation

|         |         |                |              |         |                      |        |
|---------|---------|----------------|--------------|---------|----------------------|--------|
| Austria | Germany | France         | Italy        | Benelux | Spain                | UK     |
| Sweden  | Poland  | Czech Republic | Ukraine      | Russia  | Romania              | Turkey |
| USA     | China   | Australia      | Saudi Arabia | Qatar   | United Arab Emirates |        |

## Market Structure

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| Others         |             |                      |                   |                   |                       |

- Market data are available for each country separately as well as aggregated for the package purchased.
- Each country report includes data for exterior insulation finishing systems (EIFS) by product groups, finish coats, insulation thickness, business segments, customer segments and distribution channels separately as well as aggregated for the total market of EIFS in terms of value and quantity.

# The Unique Mix of Methods and Approaches for Reliable Market Analysis



## SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



## Survey with Manufacturers & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturers as well as interviews with industry experts.

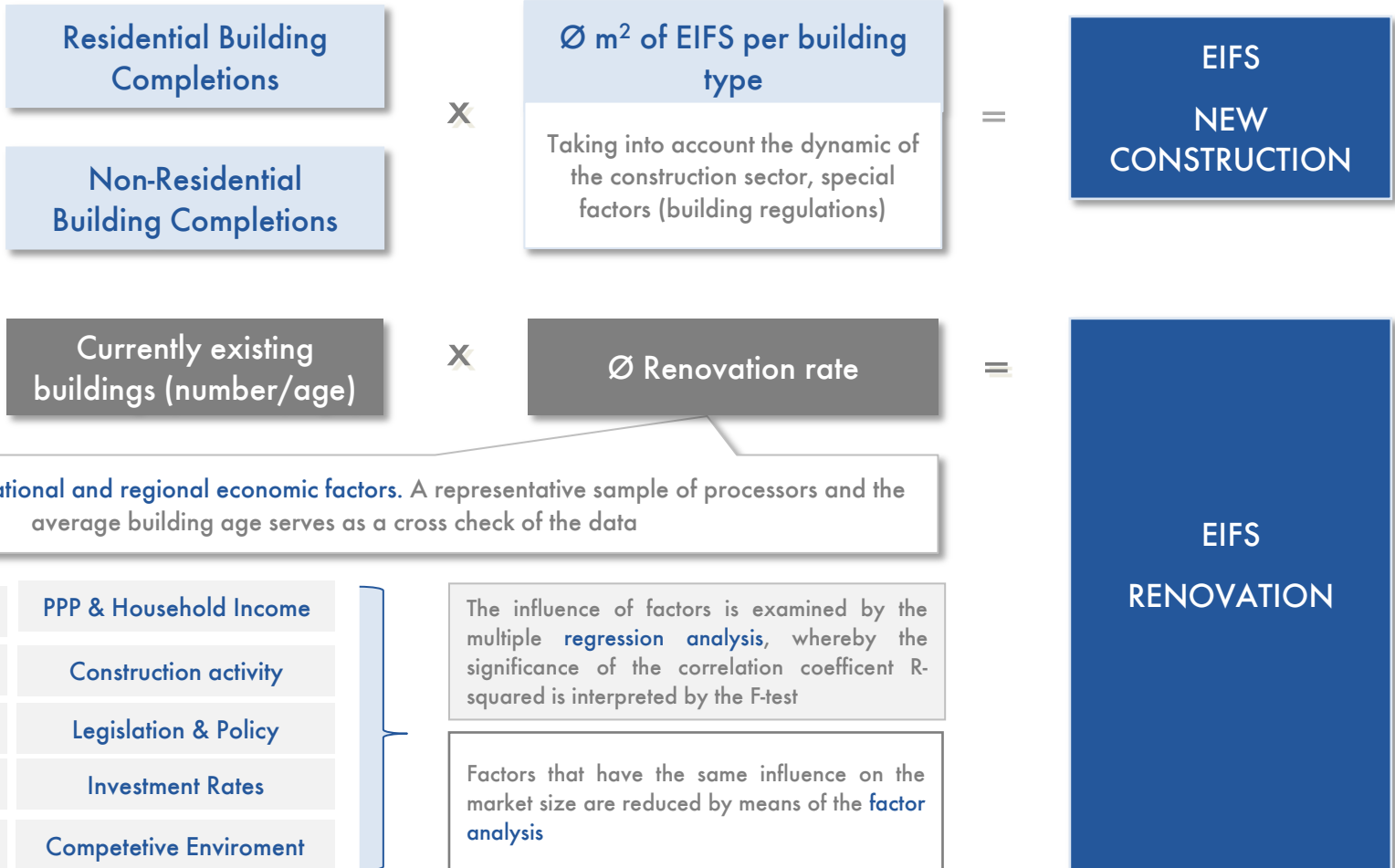
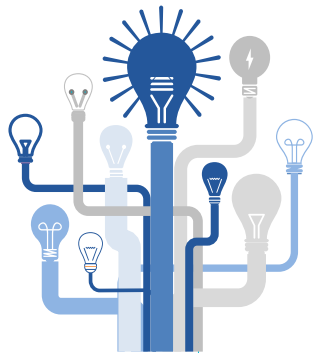


## Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**  
“Only who talks with the industry knows what’s going on!”

# Calculation and Forecast: Prediction Methods



# The Market Intelligence Tool

## Dashboards - The Best Way to Work with Data

A picture says more  
than 1000 words

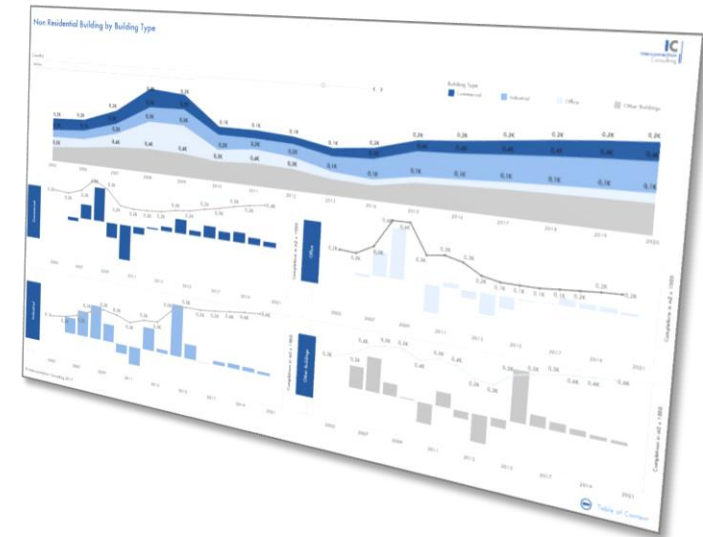
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online  
accessibility

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file



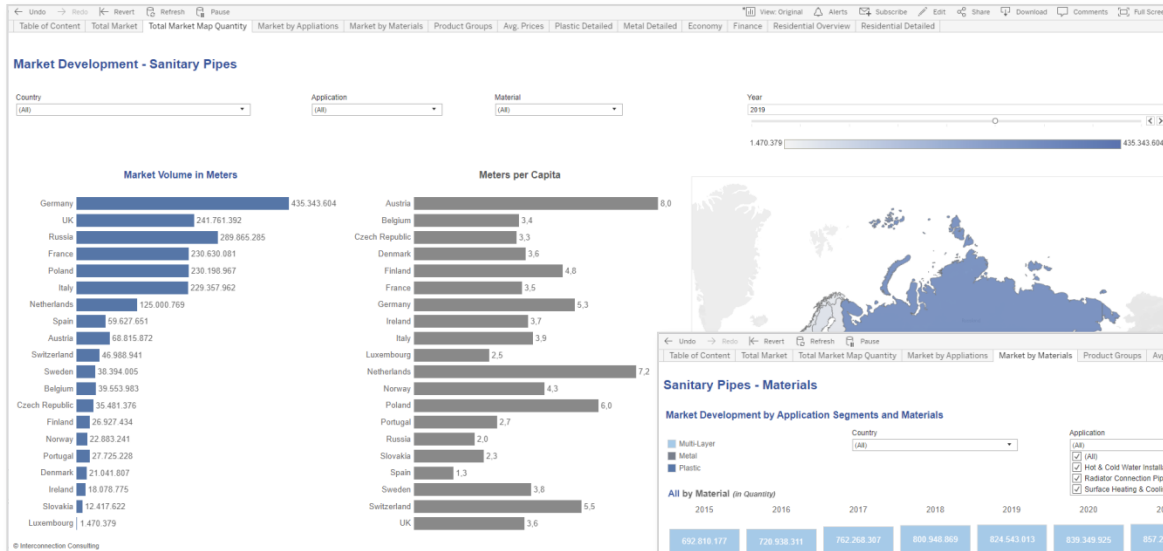


# Usability of the Market Intelligence Tool

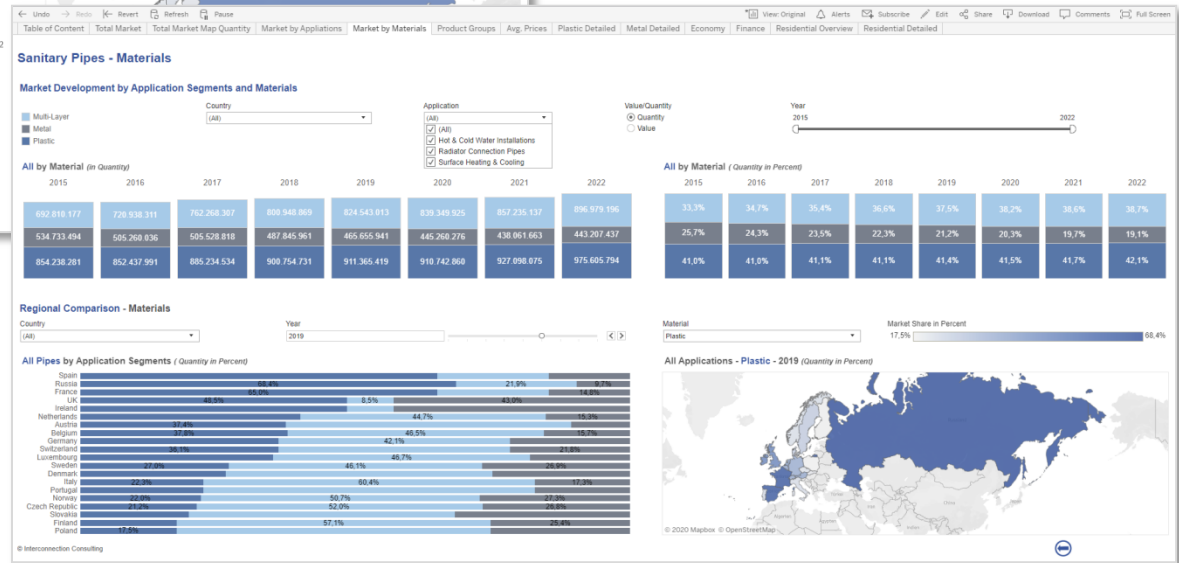
Let's Put it in a Video...



# Sample Cockpits for Market Analysis Data

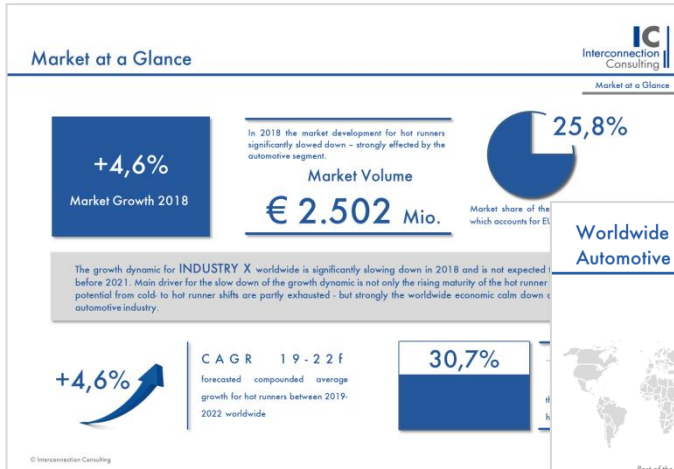


*This chart contains fictive data*

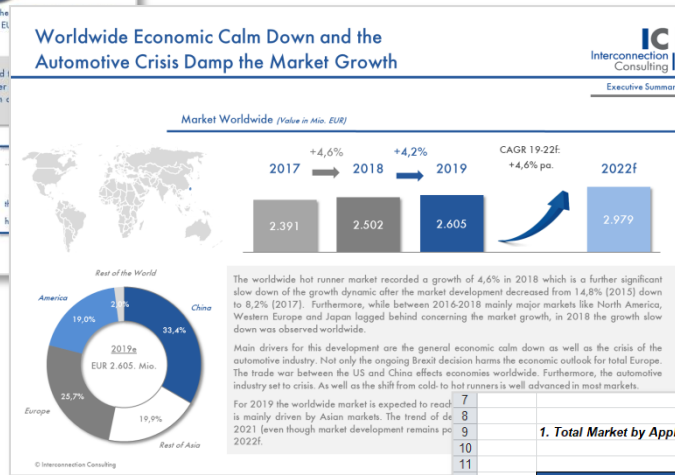


# Additional Deliverables

## Executive Summary and Pivot-Tables



Executive Summary as PDF (fictive data)



Executive Summary as PDF (fictive data)

1. Total Market by Application Segment

| Country      |              |              |              |              |              |              |              |              |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| (Alle)       |              |              |              |              |              |              |              |              |
| Application  | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2022         | 2023         |
| Segment A    | 573.8        | 628.6        | 645.5        | 525.5        | 652.1        | 661.2        | 681.9        | 706.7        |
| Segment B    | 205.8        | 223.3        | 234.8        | 189.5        | 247.6        | 259.3        | 272.2        | 285.5        |
| Segment C    | 401.0        | 427.2        | 441.3        | 377.4        | 460.6        | 479.0        | 500.3        | 522.4        |
| Segment D    | 242.5        | 260.0        | 272.5        | 228.1        | 286.7        | 301.0        | 317.8        | 332.7        |
| Segment E    | 413.2        | 455.4        | 496.5        | 380.0        | 531.1        | 567.9        | 614.8        | 650.6        |
| Segment F    | 100.5        | 107.2        | 113.6        | 94.9         | 119.3        | 124.6        | 132.0        | 136.8        |
| Segment G    | 164.5        | 174.8        | 180.6        | 154.7        | 188.3        | 196.1        | 205.3        | 214.2        |
| Segment H    | 109.2        | 114.2        | 116.8        | 104.1        | 119.7        | 122.7        | 126.2        | 129.6        |
| <b>Total</b> | <b>2.211</b> | <b>2.391</b> | <b>2.502</b> | <b>2.054</b> | <b>2.605</b> | <b>2.712</b> | <b>2.851</b> | <b>2.979</b> |

Pivot-Table including all raw data as MS-Excel file (fictive data)

# Investment Plan for Your Market Information System

| Market Information System - Packages |                             | Subscription * |
|--------------------------------------|-----------------------------|----------------|
| OPTION - 1                           | 1 Country of Your Choice    | € 2.750,-      |
| OPTION - 5                           | 5 Countries of Your Choice  | € 11.950,-     |
| OPTION - 10                          | 10 Countries of Your Choice | € 21.950,-     |
| OPTION - 20                          | 20 Countries of Your Choice | € 39.950,-     |

## Available Countries

|    |         |    |     |    |    |    |    |     |    |
|----|---------|----|-----|----|----|----|----|-----|----|
| AT | Benelux | CZ | DE  | ES | FR | IT | PL | RO  | RU |
| SE | UK      | UA | USA | CN | AU | QA | SA | UAE | TR |

- **Subscription:** 25% 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 automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.
- Additional packages available on request. In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is included as well as for any subscription order exceeding 2 countries or regions. For all other options, license costs for Tableau cockpits are € 500,-/license.
- The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of an subscription.

# Selected References

**STRABAG**

**sto** 

SIEMENS

  
SAINT-GOBAIN

BCG

  
DAW

**KPMG**

**pwc** 

**JSM**  
Möbelbausysteme

**BAU**  
**4** 

PENTA

  
Qualitätsprofile für Fenster + Türen  
**SALAMANDER**  
INDUSTRIE//PRODUKTE

**SATTLER**   
thinking highTEX

  
MAN

**EgoKiefer**  
Fenster und Türen

 **Webasto**

**Roland Berger**  
Strategy Consultants

Always precise **WINK HAUS**

  
Henkel



# Our Market-Intelligence Tools



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

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we show you the way



## Yes, we would like to order the IC Market Forecast® Exterior Insulation Finishing Systems

(Please, print out the order form and mark your desired products)

Please choose from the available countries

- |   |                                  |                                  |                                       |
|---|----------------------------------|----------------------------------|---------------------------------------|
| <input type="checkbox"/> Austria        | <input type="checkbox"/> Italy   | <input type="checkbox"/> Ukraine | <input type="checkbox"/> Qatar        |
| <input type="checkbox"/> Germany        | <input type="checkbox"/> UK      | <input type="checkbox"/> Romania | <input type="checkbox"/> Saudi Arabia |
| <input type="checkbox"/> Czech Republic | <input type="checkbox"/> Benelux | <input type="checkbox"/> Russia  | <input type="checkbox"/> USA          |
| <input type="checkbox"/> France         | <input type="checkbox"/> Sweden  | <input type="checkbox"/> Turkey  | <input type="checkbox"/> China        |
| <input type="checkbox"/> Spain          | <input type="checkbox"/> Poland  | <input type="checkbox"/> UAE     | <input type="checkbox"/> Australia    |

- |   |              |
|---|--------------|
| <input type="checkbox"/> 1 Country.....     | EUR 2.750.-  |
| <input type="checkbox"/> 5 Countries .....  | EUR 11.950.- |
| <input type="checkbox"/> 10 Countries ..... | EUR 21.950.- |
| <input type="checkbox"/> Full Package.....  | EUR 39.950.- |

|   | Single Issue | Subscription* |
|---|--------------|---------------|
| 25% price advantage   |              | ✓             |
| IC Cockpit - Online Dashboard Solution  | ✓            | ✓             |
| Full Flexibility - Within the sum of the subscription available country reports can be changed without any additional costs |              | ✓             |
| Web-Conference with the analyst free of charge  |              | ✓             |

**Billing Address:**  
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 (necessary if different from the billing address)

Company: \_\_\_\_\_  
 Name: \_\_\_\_\_  
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 Country: \_\_\_\_\_  
 VAT identification number: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_

Company: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Post Code/Zip: \_\_\_\_\_  
 Country: \_\_\_\_\_  
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|      |      |           |
|------|------|-----------|
| Date | Name | Signature |
|------|------|-----------|

**\*Subscription:**

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 31<sup>st</sup> December. The subscription can be cancelled after two purchases of the study, but not later than 31<sup>st</sup> 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 includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of a subscription.

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