

IC Market Tracking
**Elastic Floor Coverings in
Europe 2018**

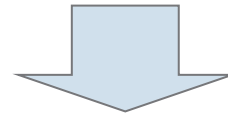
- ✓ You will receive an overview of the **overall market** in addition to **individual market segments**.
- ✓ A detailed **representation of the key markets by country and forecasting until 2021** based off of our econometric forecast model.
- ✓ A **competition analysis** containing detailed **market shares** for selected regions in terms of:
 - The total market
 - Application
 - 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



IC Market Tracking® Elastic Floor Coverings in Europe 2018

Market Structure

| | | | | | |
|--------------|----------|----------------|---------|---------|----------|
| Germany* | Austria* | Switzerland* | Italy** | France* | Belgium* |
| Netherlands* | Spain** | (UK/Ireland)** | CEE4*** | Russia* | Turkey* |



| Application | | Product Groups | Distribution Channel |
|-------------------|--------------------|-------------------------|----------------------------------|
| Health Care | Trade/Shop Fitting | Linoleum | Wholesale |
| Culture/Education | Hotel/Gastronomy | Homogeneous Vinyl/PVC | Specialized Retailers/Installers |
| Public | Industry | Heterogeneous Vinyl/PVC | DIY-Market |
| Sports | Residential | Synthetic Rubber | Direct |
| Transportation | | Cushioned Vinyl | |
| | | LVTs | Business Segment |
| | | Polyurethane | New Construction |
| | | PVC/Vinyl on HDF-Board | Renovation |
| | | Others | |

*Countries are immediately available in 2016 edition (with the exception of Ireland)

**Countries/regions will be available in 2018 edition.

***CEE4 region includes Poland, Czech Rep., Hungary, Slovakia.

For each segment the Total Market and Market Shares of the top players for 2016 and 2017 and Forecasts for the next three years are available in the study.

Product Groups

Linoleum

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

Homogeneous Vinyl

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

Heterogeneous Vinyl

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

Synthetic Rubber

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

Cushioned Vinyl

„Cushioned Vinyls“ mean „foamed PVC floor coverings“. Those CV coverings are heterogeneous and therefore multilayer.

LVTs

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

Distribution Channel

Wholesale

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

Specialist retailers/Installers

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

DIY-Market

Do-it-yourself store and home improvement stores.

Direct

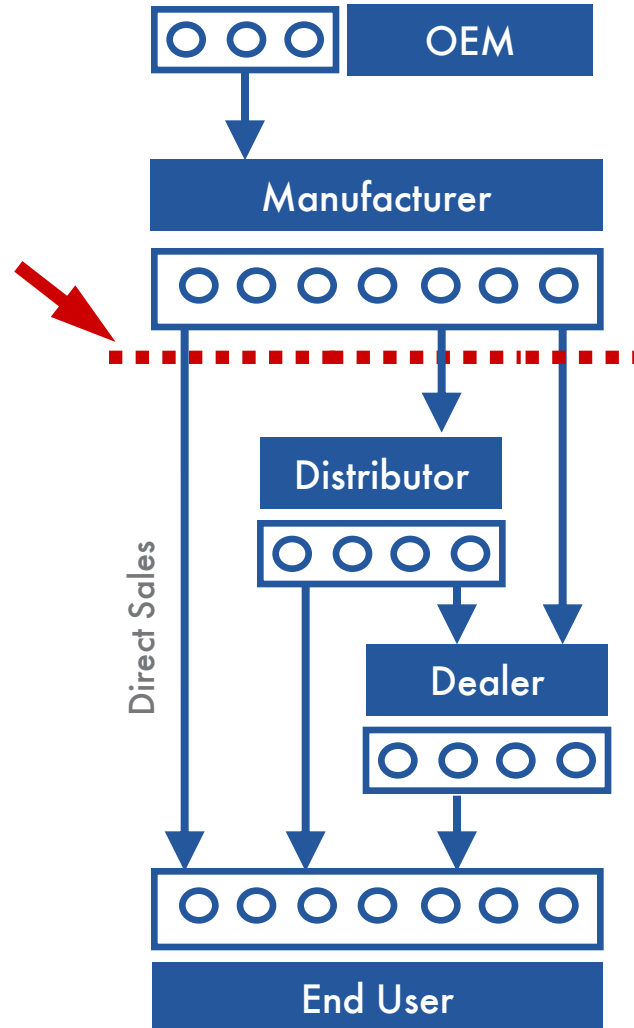
Direct sale to the end-consumer.

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

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.



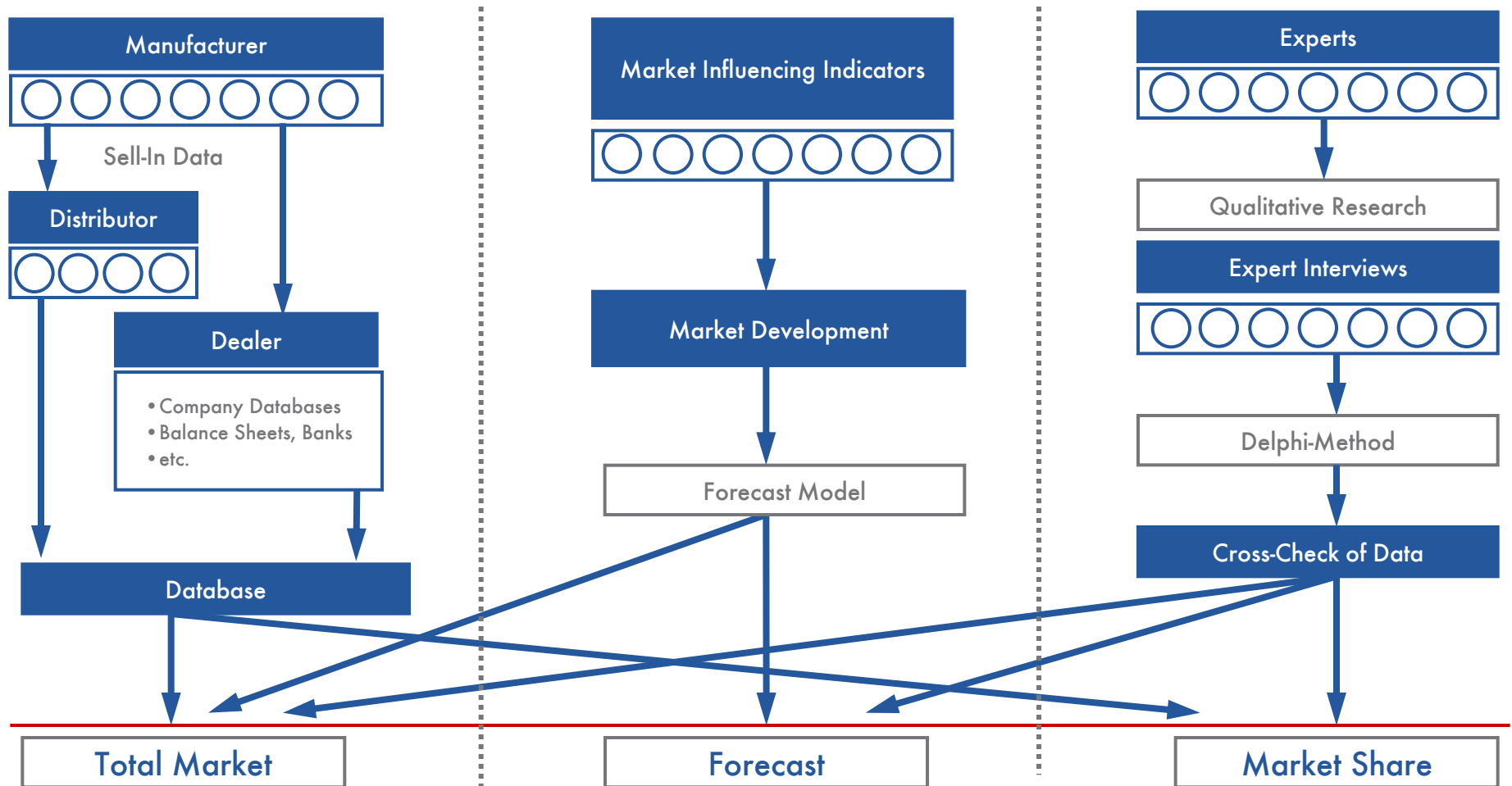
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

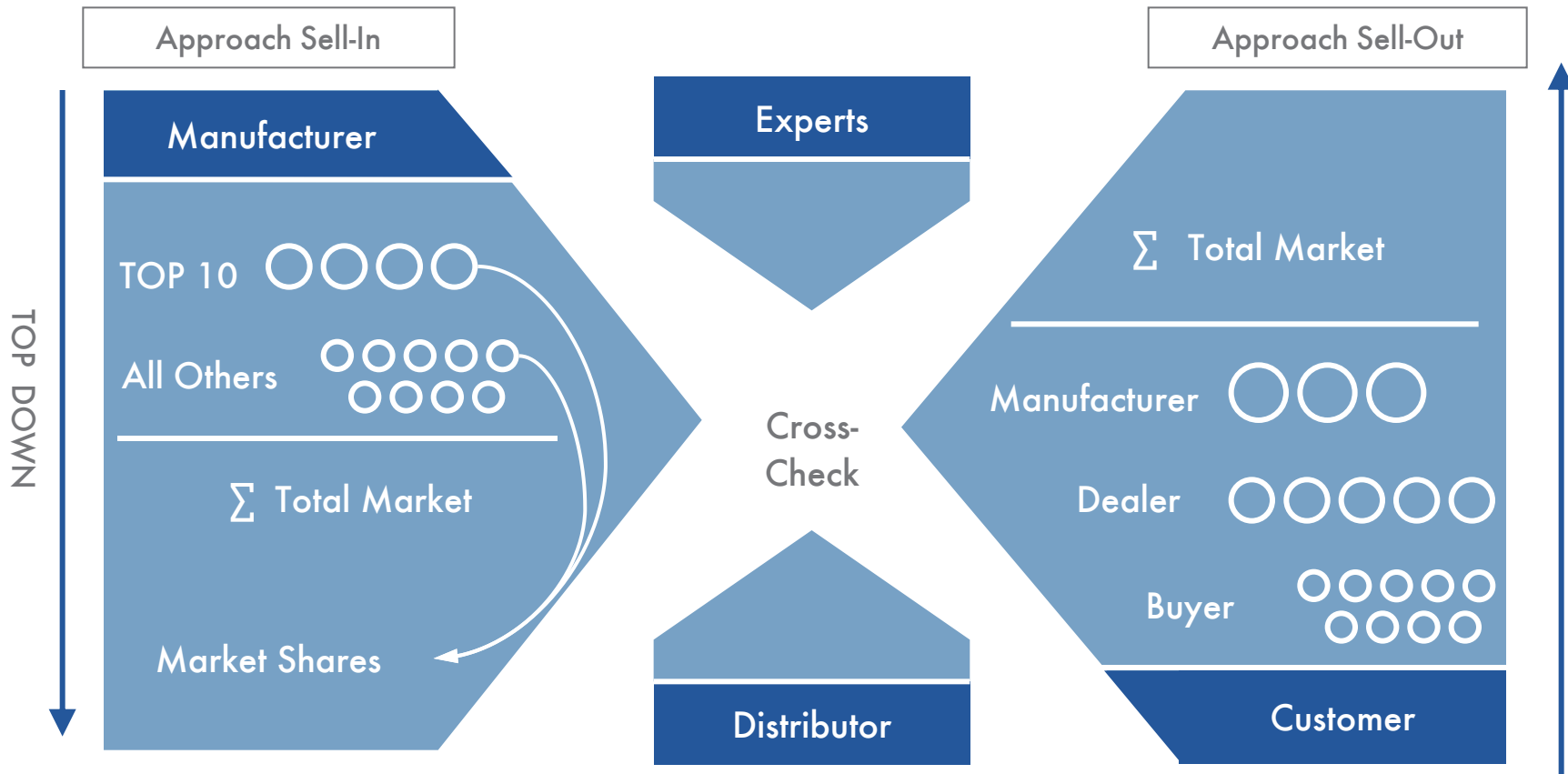
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology



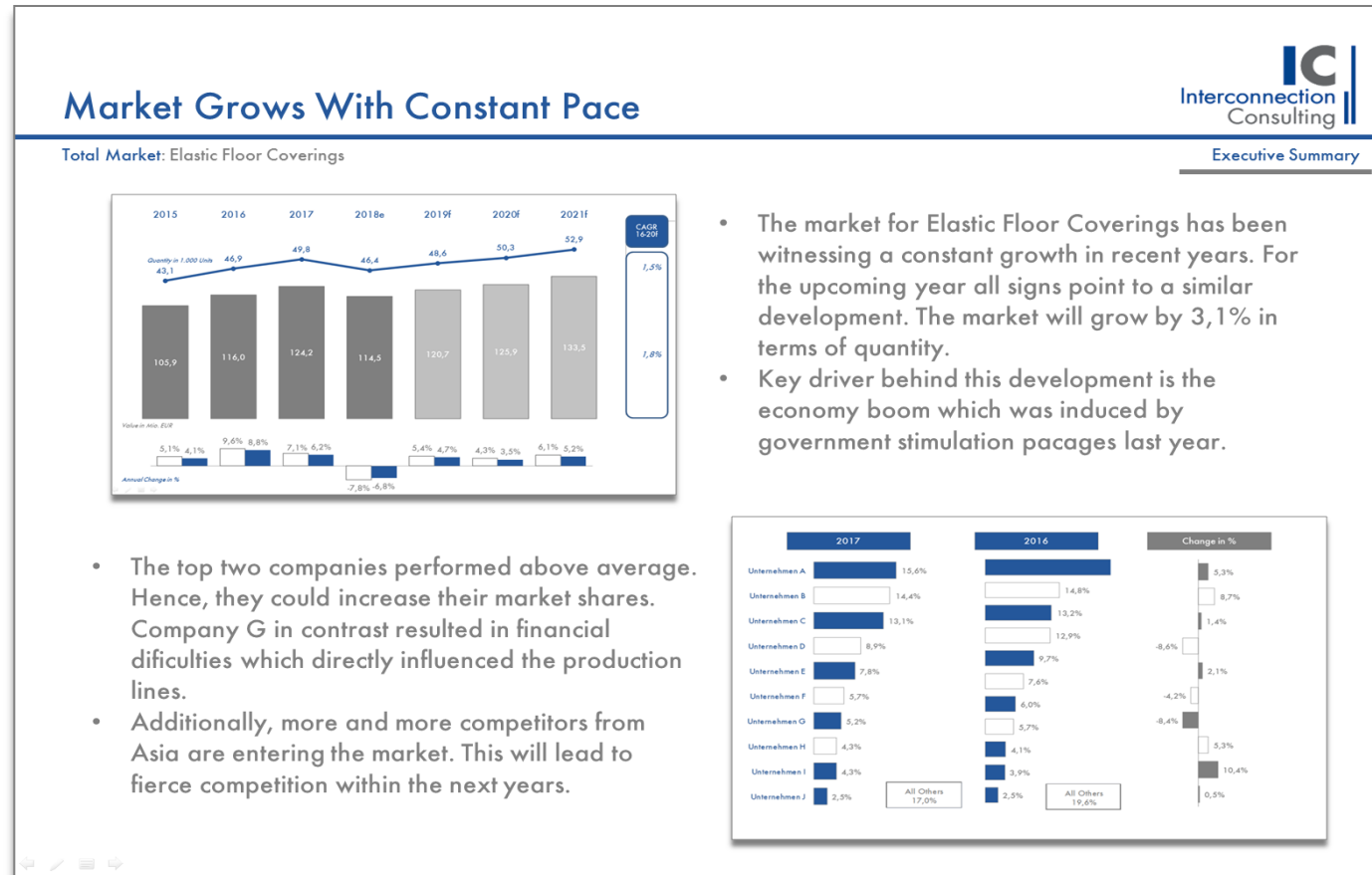
How Do we Cross Check the Data?



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

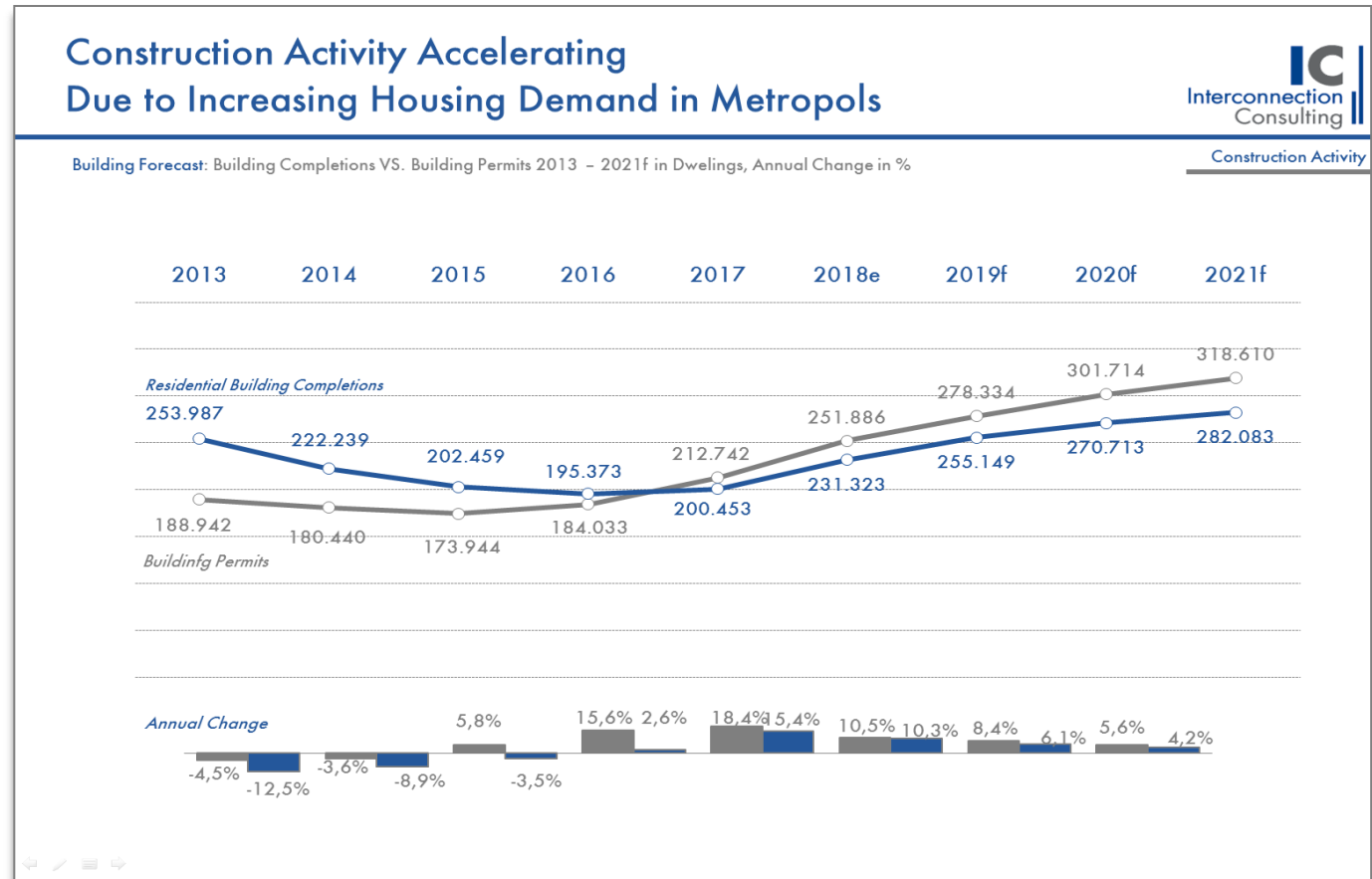
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market 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.

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



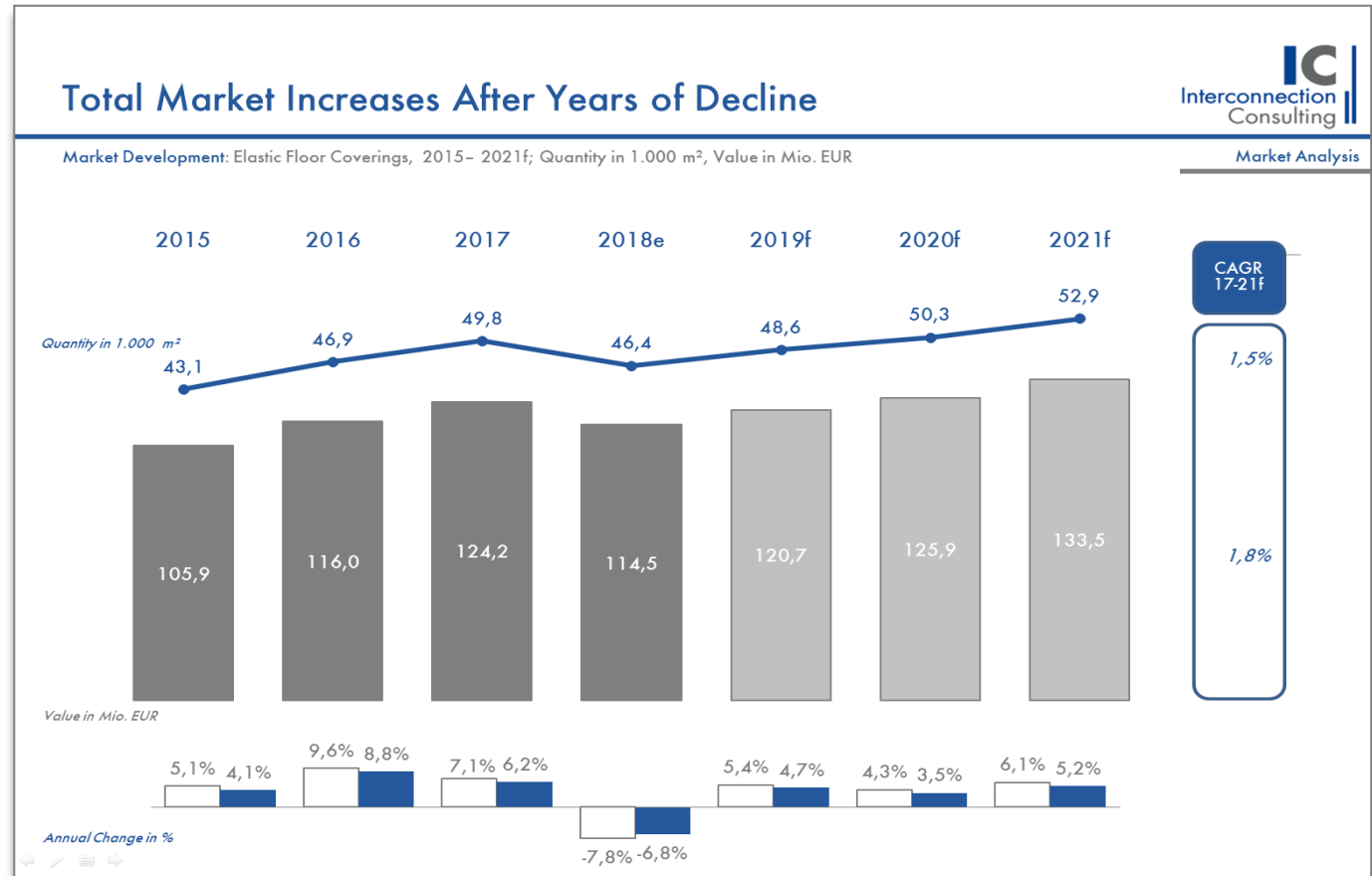
Market Environment Data of Our Forecasting Model

- 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

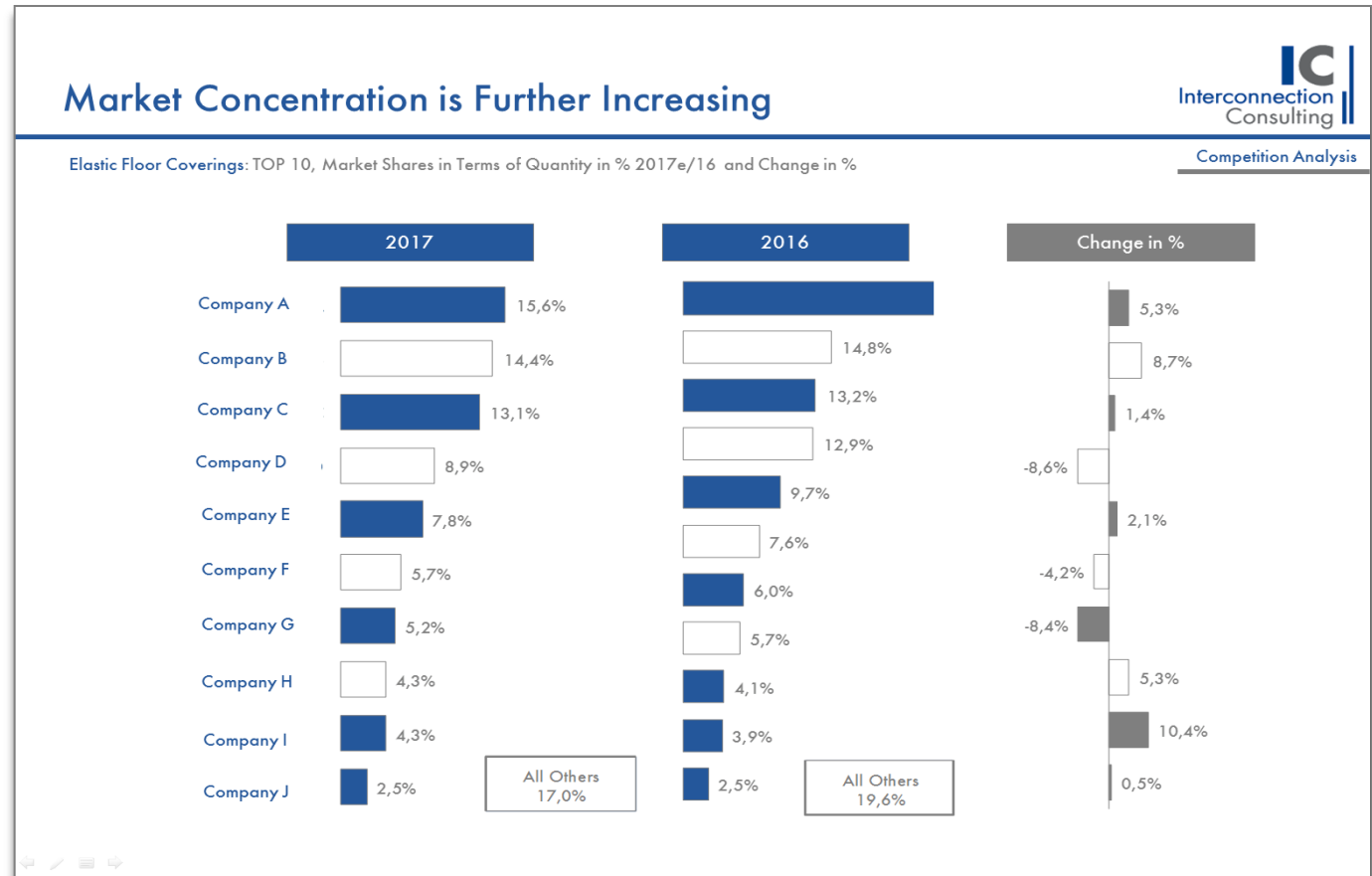
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- 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 | A |
| Distribution | (All) |
| Quarter | 4 |
| Quantity/Value | Quantity |
| Weight Classes | (All) |
| Country | Germany |
| Brand | (All) |
| ∅ Price in € (Classes) | (All) |


| Sum - # | |
|------------------|---------------|
| Segments | Results |
| Segment A | 18.592 |
| Segment B | 8.434 |
| Segment C | 5.310 |
| Segment D | 3.290 |
| Segment E | 1.332 |
| Total | 36.958 |

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 | 4 |
| Quantity/Value | Quantity |
| Weight Classes | (All) |
| Country | Germany |
| Brand | (All) |
| ∅ Price in € (Classes) | (All) |

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

Investment Plan for Your Market Research

| | Single Issue | IC Subscription* | Scale of Discounts | |
|-----------------|--------------|---|--------------------|------|
| Single Country | € 3.950,- |  | € 7.000 | -10% |
| All Countries** | € 28.440,- | | € 10.000 | -20% |
| | | | € 14.750 | -25% |
| | | | € 23.600 | -33% |
| | | | € 34.400 | -40% |

Available countries

| | | | | | | |
|-------------|---------|-------------|-------|--------|---------|------------------|
| Germany | Austria | Switzerland | Italy | France | Belgium | Others on Demand |
| Netherlands | Spain | UK/Ireland | CEE4 | Russia | Turkey | |

* **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

Webverstärker



- 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

Dostojevsky Rad 11, SK- 811 09 Bratislava

Veronika Hudáková- Market Analyst

Tel: :+43 1 375 00 15 15

Fax: +43 1 5854623 -30

hudakova@interconnectionconsulting.com

Katarina Gajdová- Market Analyst

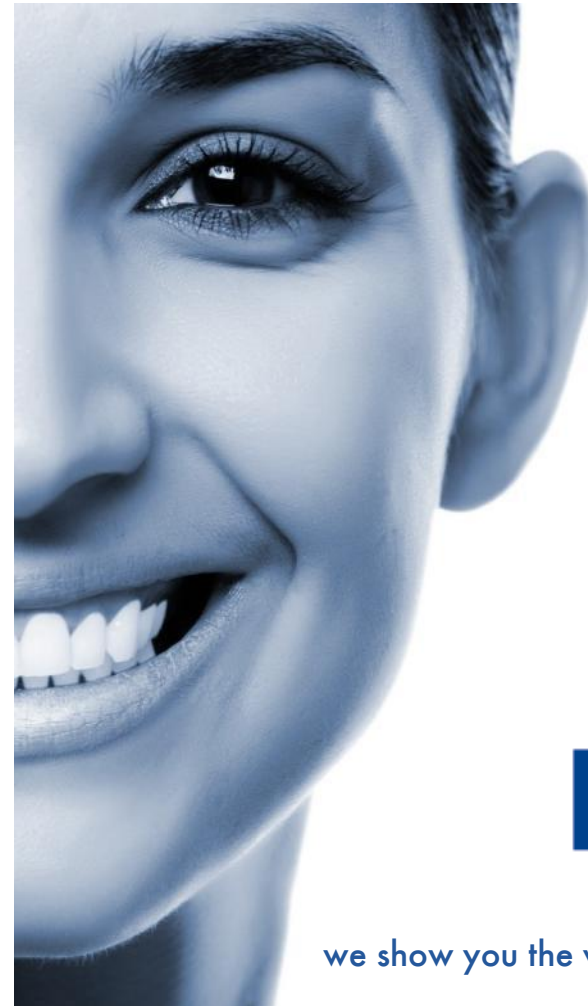
Tel: +43 1 375 00 15 14

Fax: +43 1 5854623 -30

gajdova@interconnectionconsulting.com

Interconnection Consulting | Vienna • Oberstdorf • Lviv • Bratislava

www.interconnectionconsulting.com



we show you the way

Factsheet: Elastic Floor Coverings in Europe 2018

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 75/ per Country
- Optional: Hard Cover: 300 €

Price

- Single Country: 3.950 €
- All Countries: 28.440 €

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, driving system types and application fields and automation.

Competition 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 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.

FAX: +43 1 585 46 23 30

E-Mail: gajdova@interconnectionconsulting.com



Yes, we would like to order the
IC Market Tracking® Elastic Floor Coverings in Europe 2018
(Please, print out the order form and mark your desired products)

**IC SUBSCRIPTION
20 % PRICE ADVANTAGE**

| Country/Region | Single Issue |
|---|--------------|
| <input type="checkbox"/> Germany | 3.950,- EUR |
| <input type="checkbox"/> Austria | 3.950,- EUR |
| <input type="checkbox"/> Switzerland | 3.950,- EUR |
| <input type="checkbox"/> Italy | 3.950,- EUR |
| <input type="checkbox"/> United Kingdom | 3.950,- EUR |
| <input type="checkbox"/> Spain | 3.950,- EUR |
| <input type="checkbox"/> France | 3.950,- EUR |
| <input type="checkbox"/> Belgium | 3.950,- EUR |
| <input type="checkbox"/> Netherlands | 3.950,- EUR |
| <input type="checkbox"/> Turkey | 3.950,- EUR |
| <input type="checkbox"/> Russia | 3.950,- EUR |
| <input type="checkbox"/> CEE4 | 3.950,- EUR |
| <input type="checkbox"/> All Regions | 28.440,- EUR |

Order Form

- Abonnement (20% Price Advantage) *
- Single Issue
- We would like to order additional hard copies, each for € 150
- Translation in another language (price on request)

*IC Subscription:

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.

Benefits of an Interconnection Subscription:

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

Scale of Discount

From: 7.000,- EUR 10%

From: 10.000,- EUR 20%

From: 14.750,- EUR 25%

From: 23.600,- EUR 33%

From: 34.400,- EUR 40%

Billing Address: (Please fill in the data completely)

Company: _____

First Name: _____

Surname _____

Address: _____

Post code/Zip: _____

Country: _____

VAT identification number _____

E-Mail _____

Delivery Address: (necessary if different from the Billing address)

Company: _____

First Name: _____

Surname _____

Address: _____

Post code/Zip: _____

Country: _____

Payable after receipt of invoice without discount or via Credit Card. General terms of Austrian Business apply, as agreed; any disputes arising will be settled before a competent Vienna court of law. We claim copyright protection for the work. Distribution to third parties, duplication, publication or revision, even in part, is not permitted. In case of violation the company or persons placing the order agree to pay a contract penalty of one hundred thousand Euros in each case. All prices shown exclude sales tax.

Date

Name

Signature