



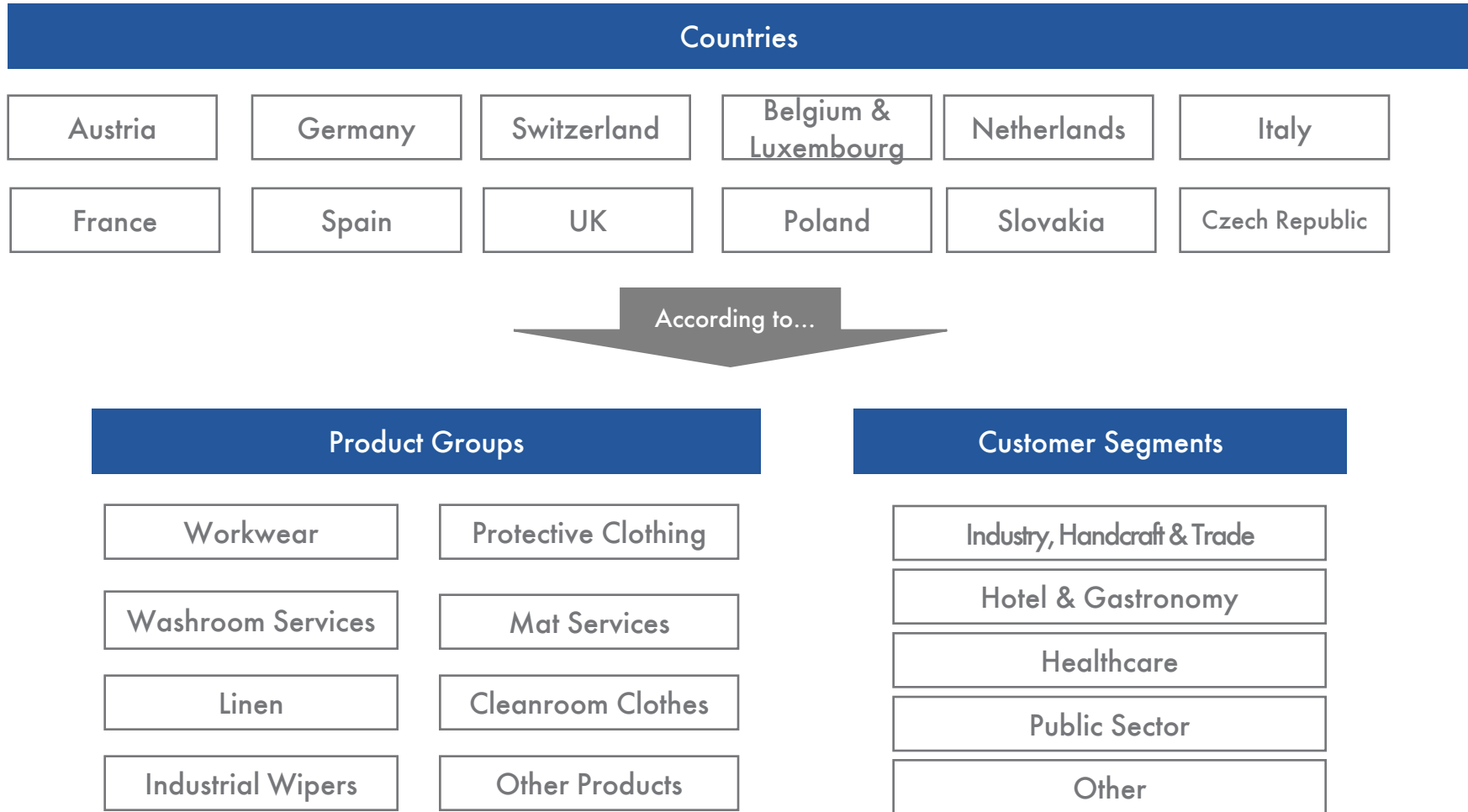
IC Market Tracking
Textile Rental Services in
Europe 2018

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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
 - Regional Markets
 - Product Groups
- ✓ 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 the last two years and forecasts for the next three years are available in the study

Definition and Demarcation

Categories

Product Groups

Workwear

Protective Clothing

Washroom Services

Mat Services

Linen

Cleanroom Clothes

Industrial Wipers

Other Products

Turnover is stated in 1.000 Euro. Values are always net-turnovers (not list-prices), excluding VAT

For all categories i.e. industry, hotels & gastronomy, corporate fashion, apparel for hospitals excluding clean room apparel

In all industries i.e. heat protection, welding protection, protection against acids

Includes hand towel services, soap dispensers, air fresheners, toilet paper dispenser etc.

All kinds of dirt-catcher mats for indoor and outdoor

For hotels ,hospitals and restaurants i.e. table cloths

Textiles used for surgery in hospitals, in biotechnology and in all fields where certain cleanroom standards need to be met

All kinds of rental wipers for cleaning and drying machinery and equipment

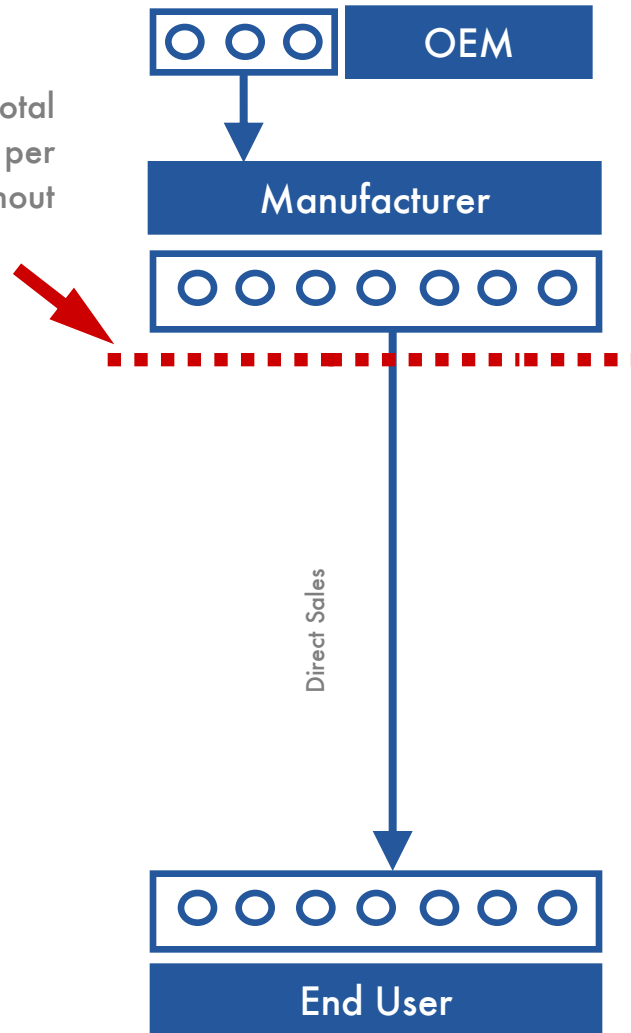
water dispensers, mops and other small textile products



Definition and Demarcation

Segments	Turnover is stated in Mio. Euro. Values are always Net-Turnovers (No List-Prices), discounts included
Industry, Handcraft & Trade	Production Sites, Industry, etc.
Hotel & Gastronomy	Textiles used in hotels and restaurants
Healthcare	Offices, Administrations & Armed Federal Forces
Public Sector	Hospitals, Nursing Homes & Sanatoriums
Other	Private Households etc.

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

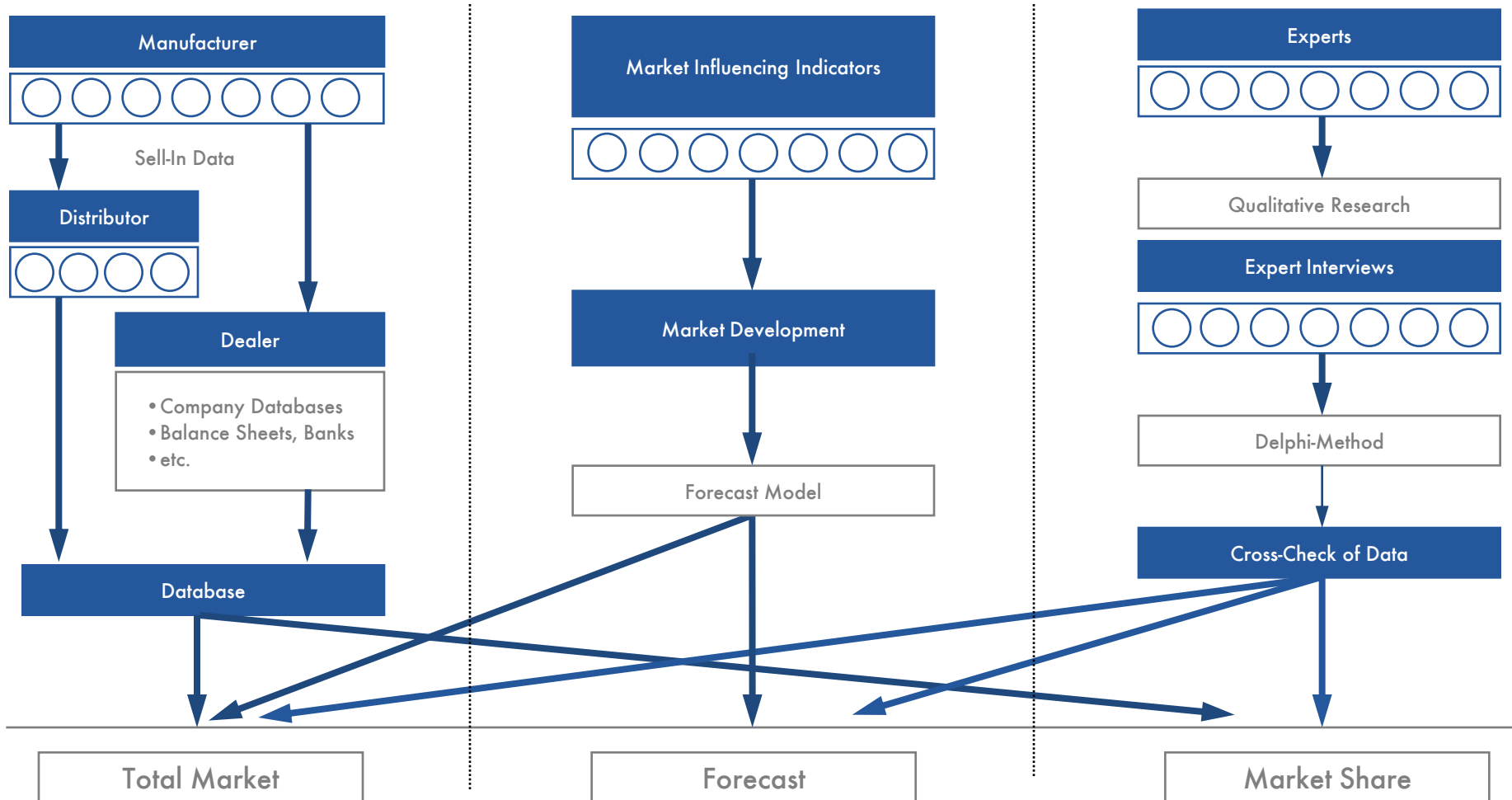


The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

Methodology



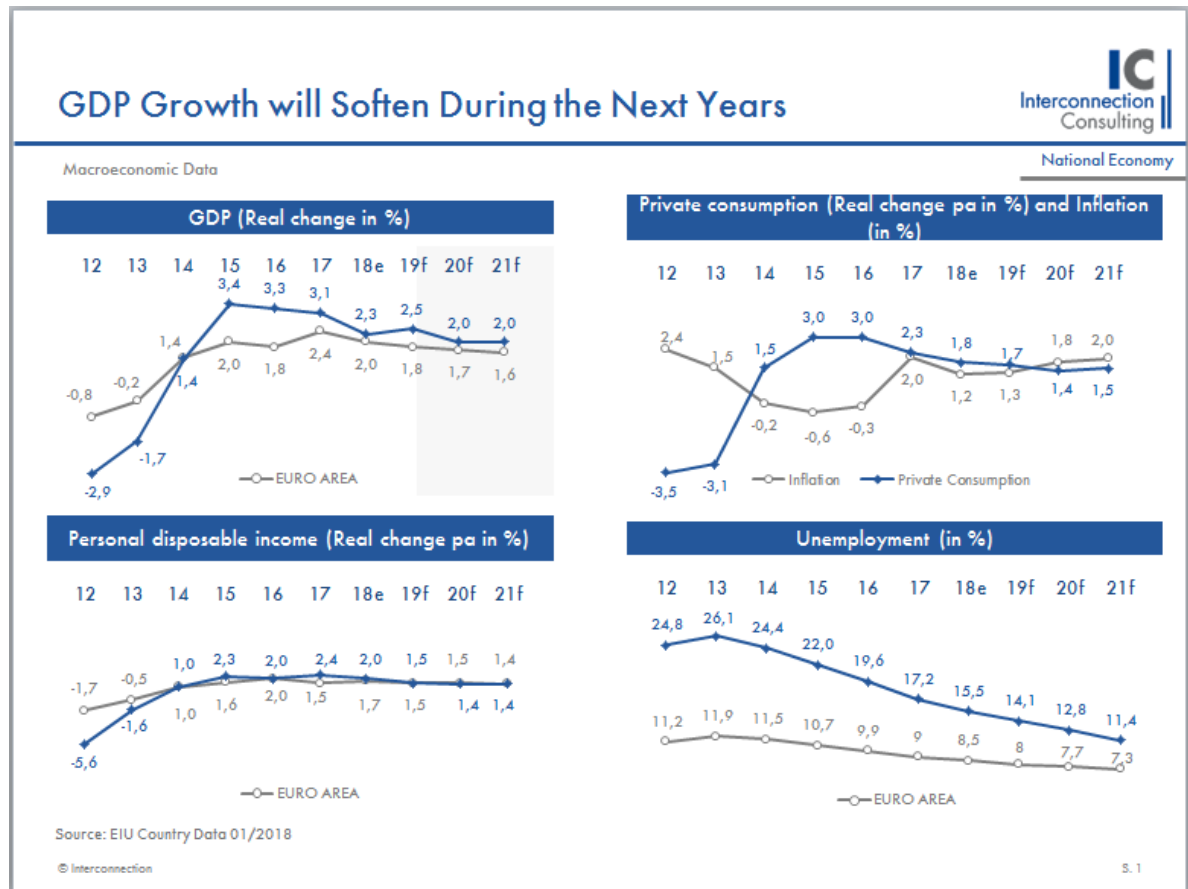
Contents of the IC Market Tracking - Textile Rental Services in Europe 2018

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.

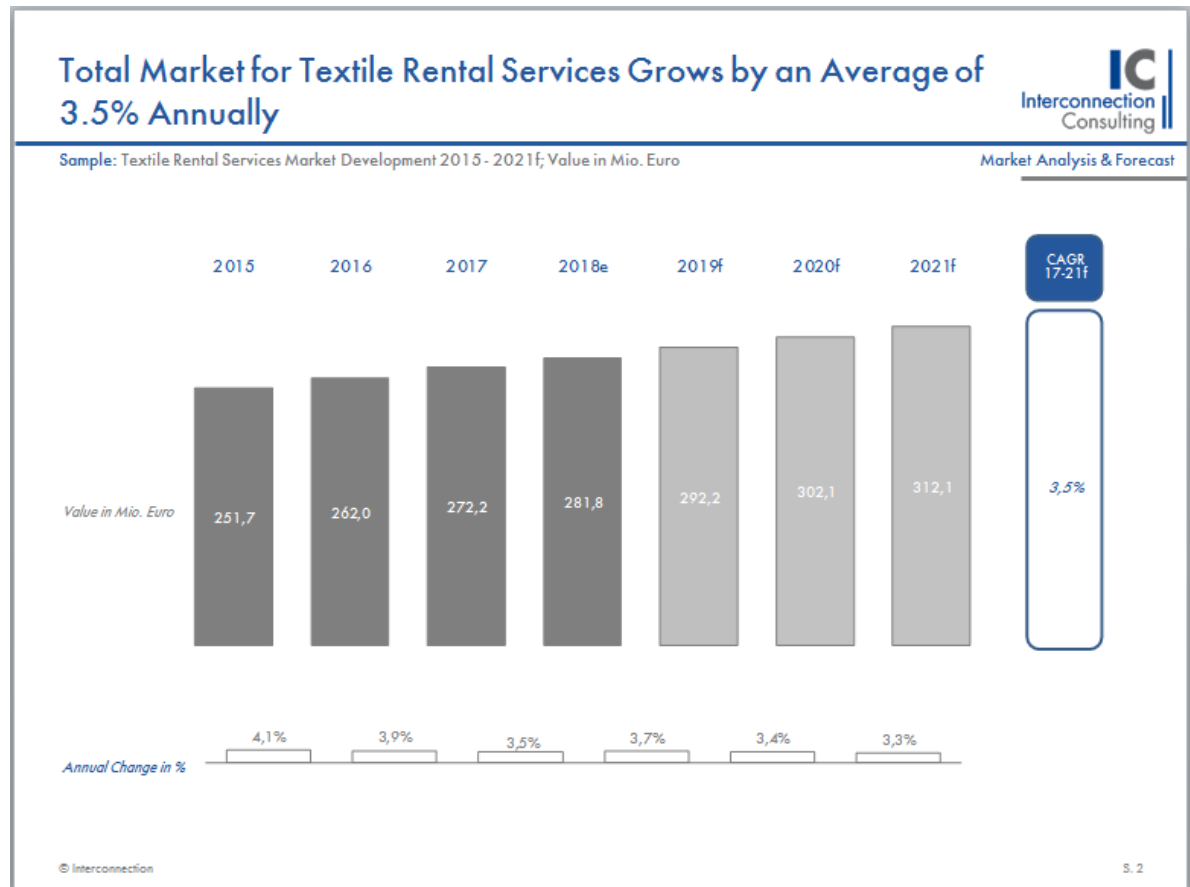
Market Environment Data of our Forecasting Model

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



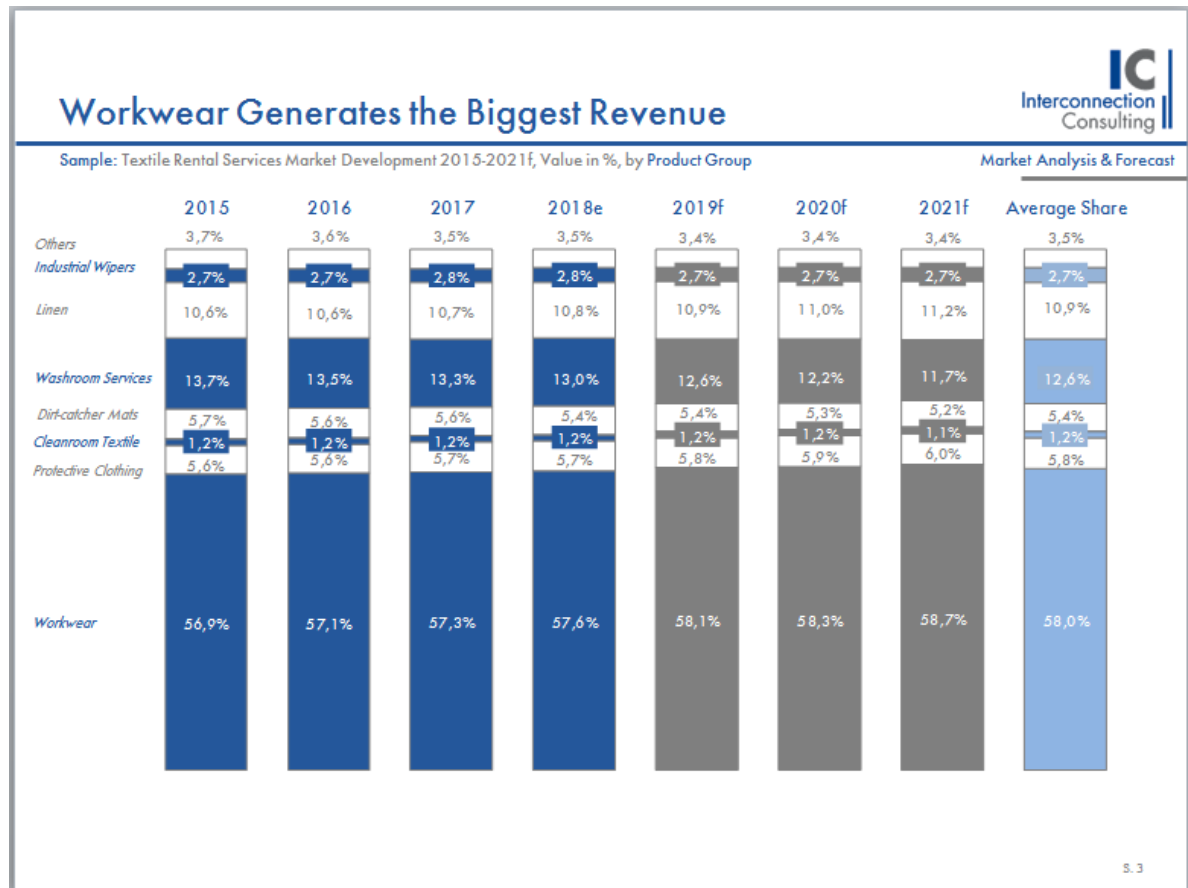
Total Market Development and Forecast

- Overview of the total market until the current year and forecast for the upcoming three years
- *This chart shows dummy figures*



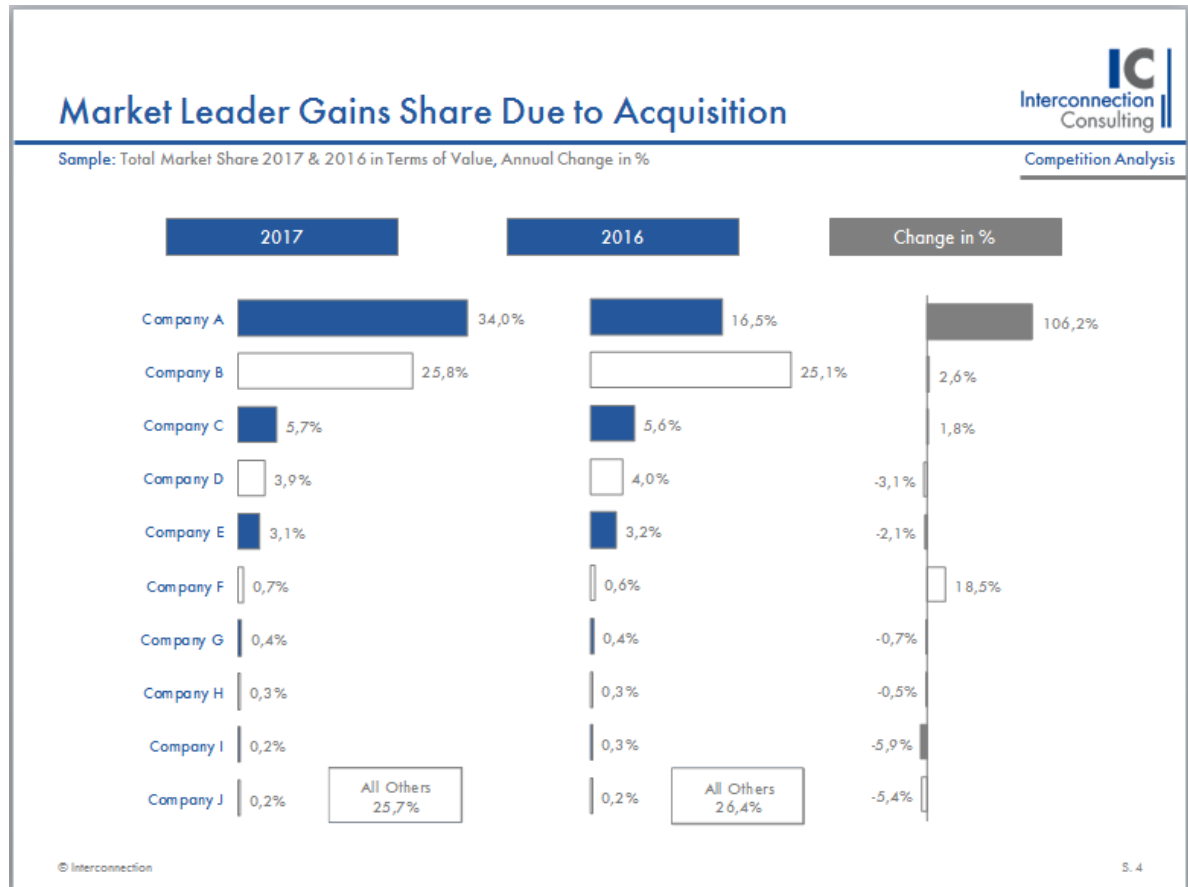
Trend-Analysis Regarding Product Groups, etc.

- Overview of the different product groups, business and customer segments including trends for the upcoming three years
- This chart shows dummy figures*

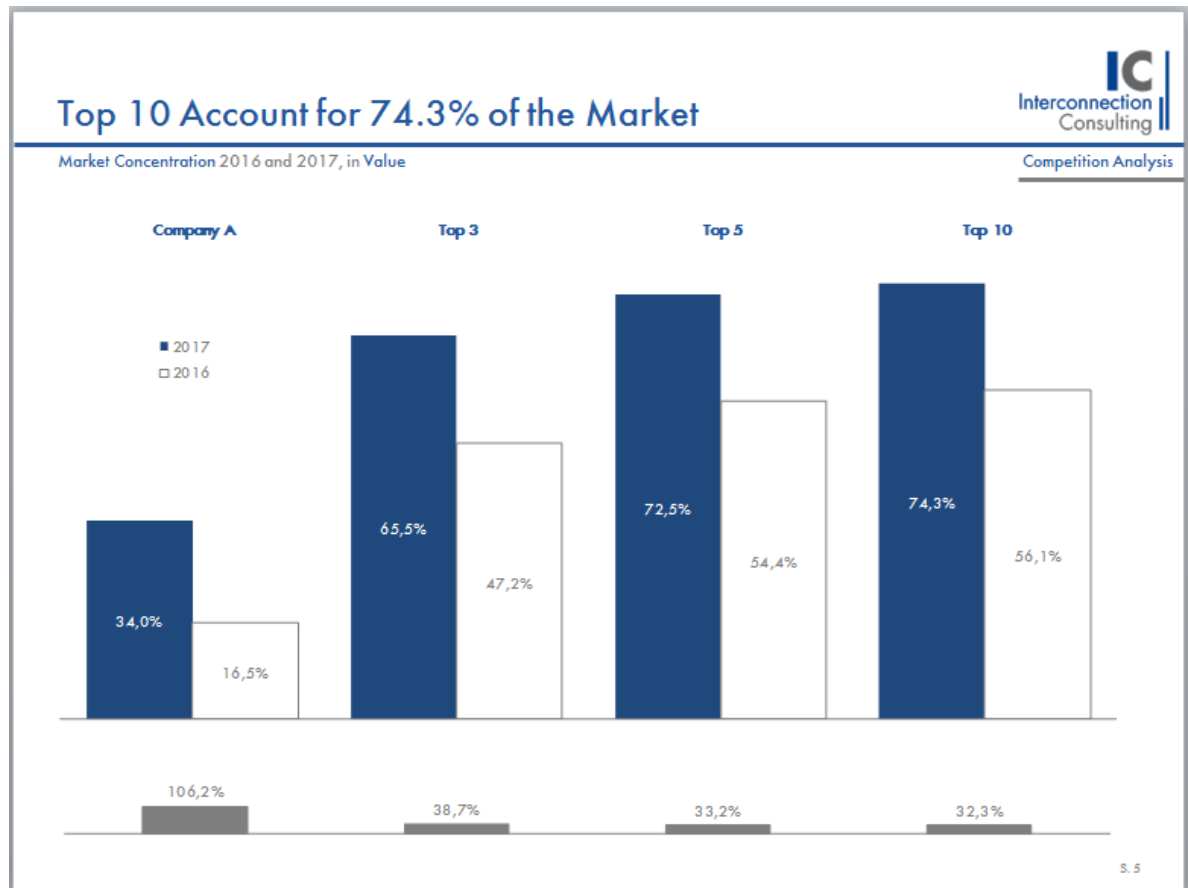


Analysis of the Competitive Landscape

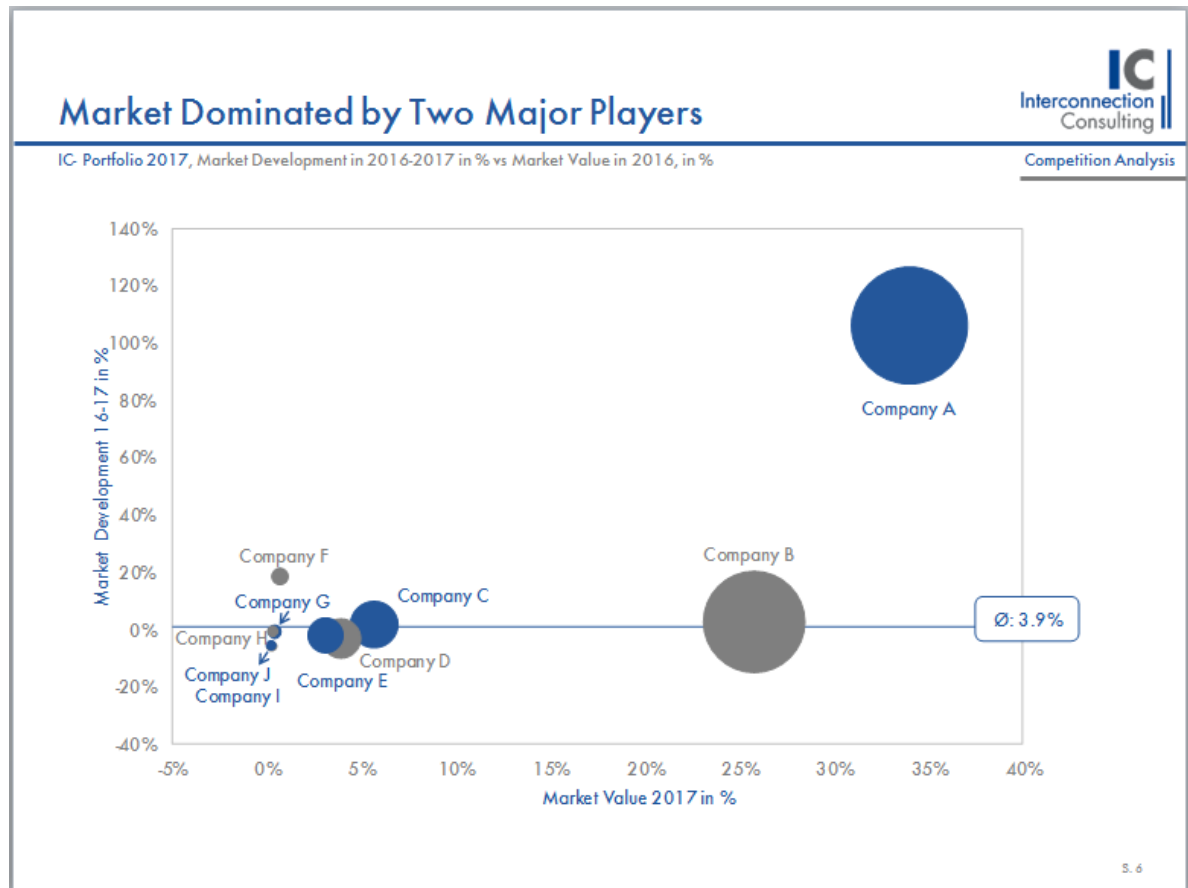
- Competition Analysis by Market Shares for all surveyed product groups/segments for the last two years
- *This chart shows dummy figures*



- Analysis of the Market Concentration among the Top Companies
- *This chart shows dummy figures*



- Market Shares & Market Changes Top 10 Players in Quantity/Value
- *This chart shows dummy figures*



- Additionally to the visualised 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 - #	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

This chart shows dummy figures

Investment Plan for Your Market Research

	Subscription		Scale of Discounts
Single Country	€ 2.490,-	For single issue purchase, please contact the responsible consultant Laszlo Barla barla@interconnectionconsulting.com Tel.: +43 1 585 46 - 68	€ 5.000,- 10%
Europe Total**	€ 17.850,-		€ 7.500,- 20%
			€ 10.000,- 25%
			€ 15.000,- 33%
			€ 20.000,- 40%

Available countries	Austria	Germany	Switzerland	Belgium & Luxembourg	Netherlands	Italy
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* **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

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- **Info-Hotline:** For the period of one year you can state questions to the author of the study, furthermore the team of Interconnection will assist you for free in case any methodologic questions in the area of market research will arise in your company.
- As far as possible, we can also put together **flexible subscription packages** (e.g. Biennial subscription, change of countries)
- After receiving 2 editions of the subscribed report, the **subscription can be cancelled without any problems.**

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the textile rental industry.
- 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 industry.
- Next to market data we offer for the Industry 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 the development of marketing strategies.



Selected References of our Market Reports



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

For further questions
please do not hesitate to contact us!

Interconnection Consulting

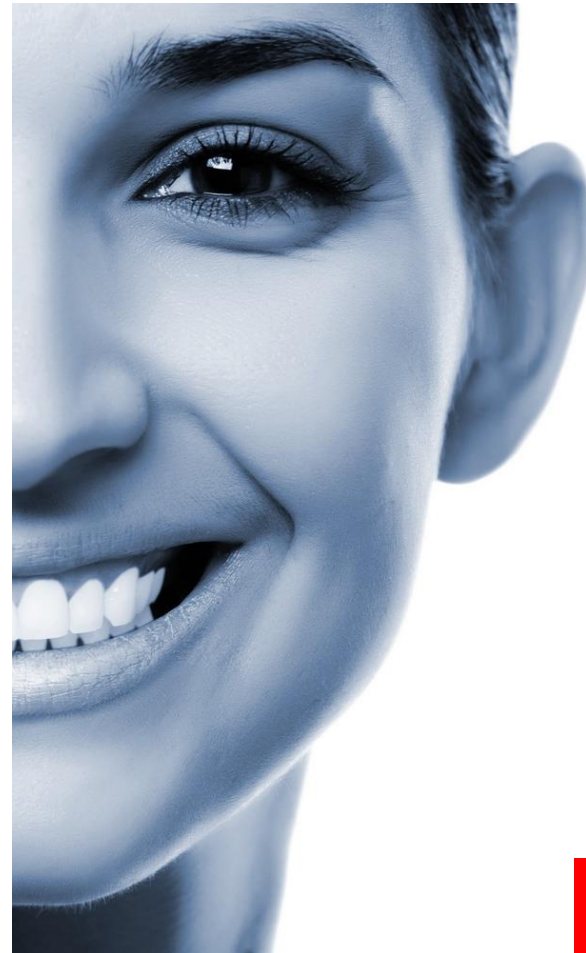
Getreidemarkt 1, A-1060 Wien

Laszlo Barla, MA – Market Analyst

Tel: +431 585 4623 - 68

Fax: +43 1 585 4623 -30

barla@interconnectionconsulting.com



Inquiry

FAX: +43 1 585 46 23 30

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