IC
Interconnection
Consulting

IC Market Forecast I
Tracking
**Exterior Insulation
Finishing Systems 2019**

www.interconnectionconsulting.com

Your Benefits at a Glance

✓ 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 2022** 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

✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.

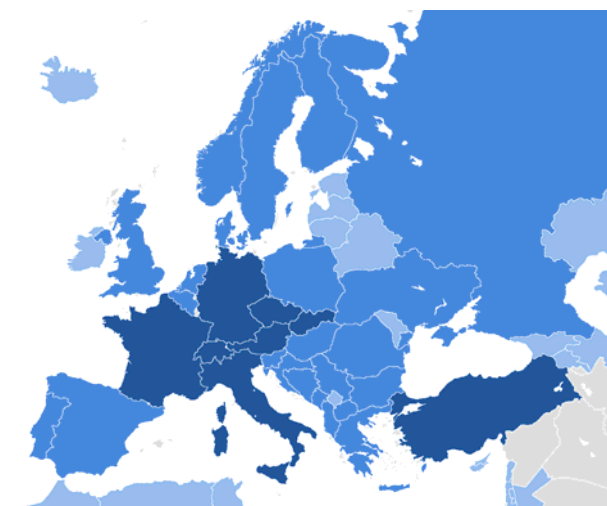✓ Company profiles for regions, where competition analysis is not available

(EIFS) Exterior Insulation Finishing Systems in Europe 2019

Exterior Insulation Finishing System (EIFS) in Europe

Countries Available

GER	AUT	SUI	NET	ITA	UKR	ESP	RUS
FRA	POL	SWE	BEL	SVK	HUN	CZK	ROU

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					

What Do We Measure in Our Reports?

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

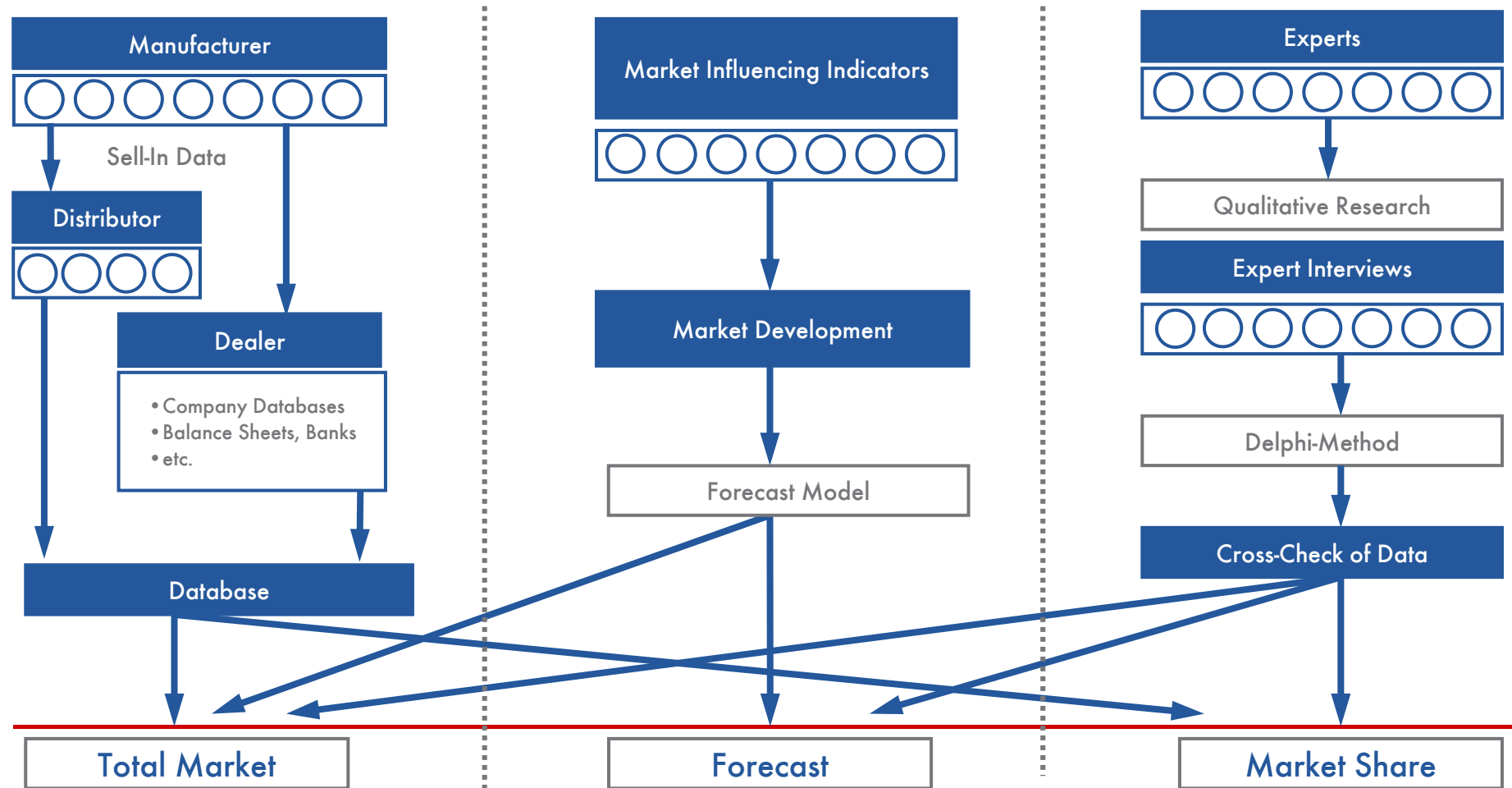Sales are segmented by the first distribution partner.
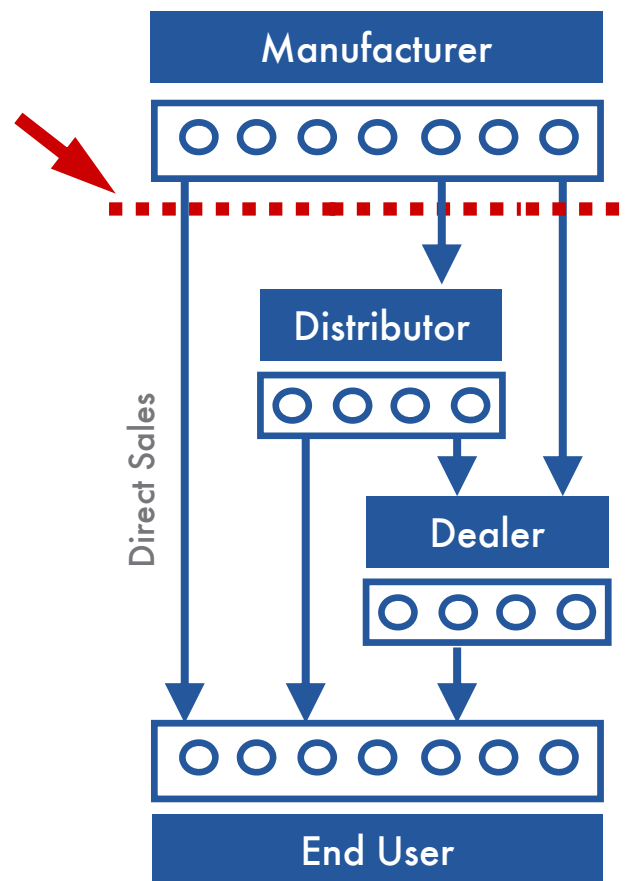
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

Manufacturer

Distributor

Sell-In Data

Dealer

- Company Databases
- Balance Sheets, Banks
- etc.

Database

Total Market

Market Influencing Indicators

Market Development

Forecast Model

Forecast

Experts

Qualitative Research

Expert Interviews

Delphi-Method

Cross-Check of Data

Market Share

How Do we Cross Check the Data?

Description Structure of Survey Methodology

Approach Sell-In

Manufacturer

TOP 10

All Others

∑ Total Market

Market Shares

TOP DOWN

Experts

Cross-Check

Distributor

Approach Sell-Out

∑ Total Market

Manufacturer

Dealer

Buyer

Customer
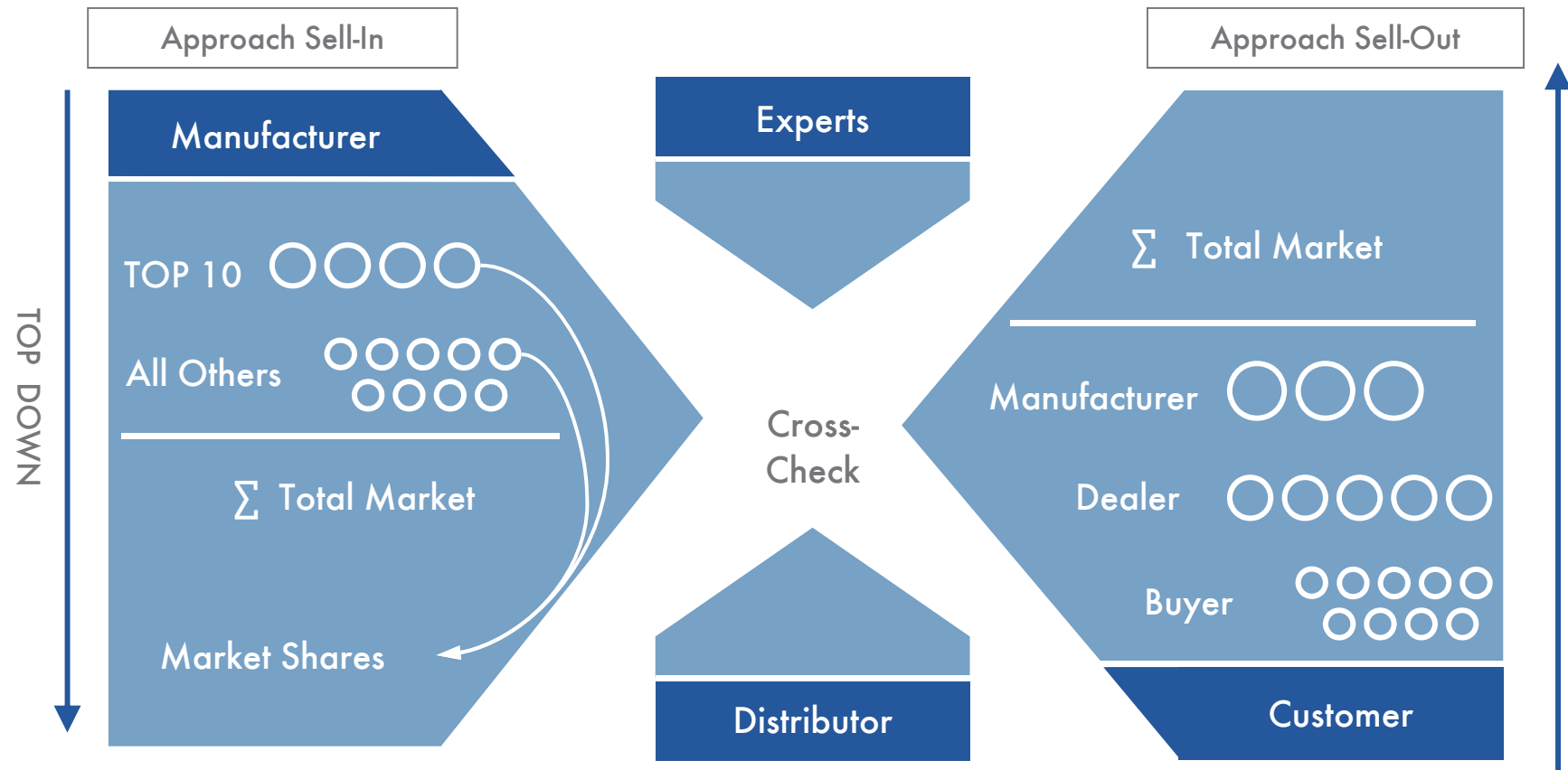
Content of the Report

The IC Market Forecast® 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. **(only available for IC Market Tracking®)**

Content of the Report *

1. Executive Summary (ca. 10 pages)

2. Definition and Methodology (ca. 5 pages)

3. Market Drivers (ca. 20 pages)

4. Regional Market Analysis and Forecast (ca. 20 pages)

5. Competition Analysis (ca. 20 pages)

6. Tables, Facts and Figures Pivot Table
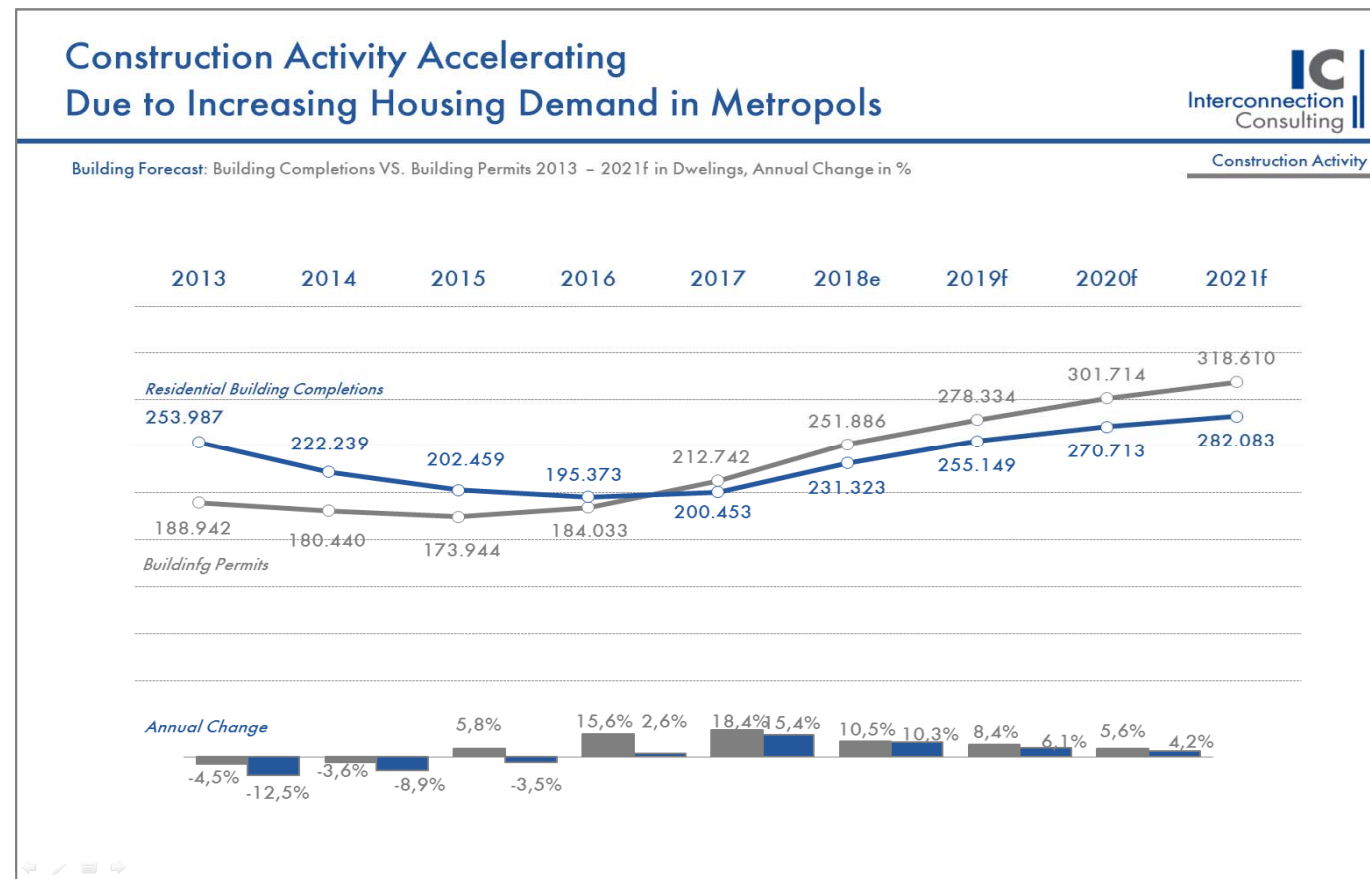
*Pages based on single country report

Executive Summary at the Beginning of the Report

- The executive summary comprises all relevant information of the report in precise manner. Forecast and

- competition situation is highlighted
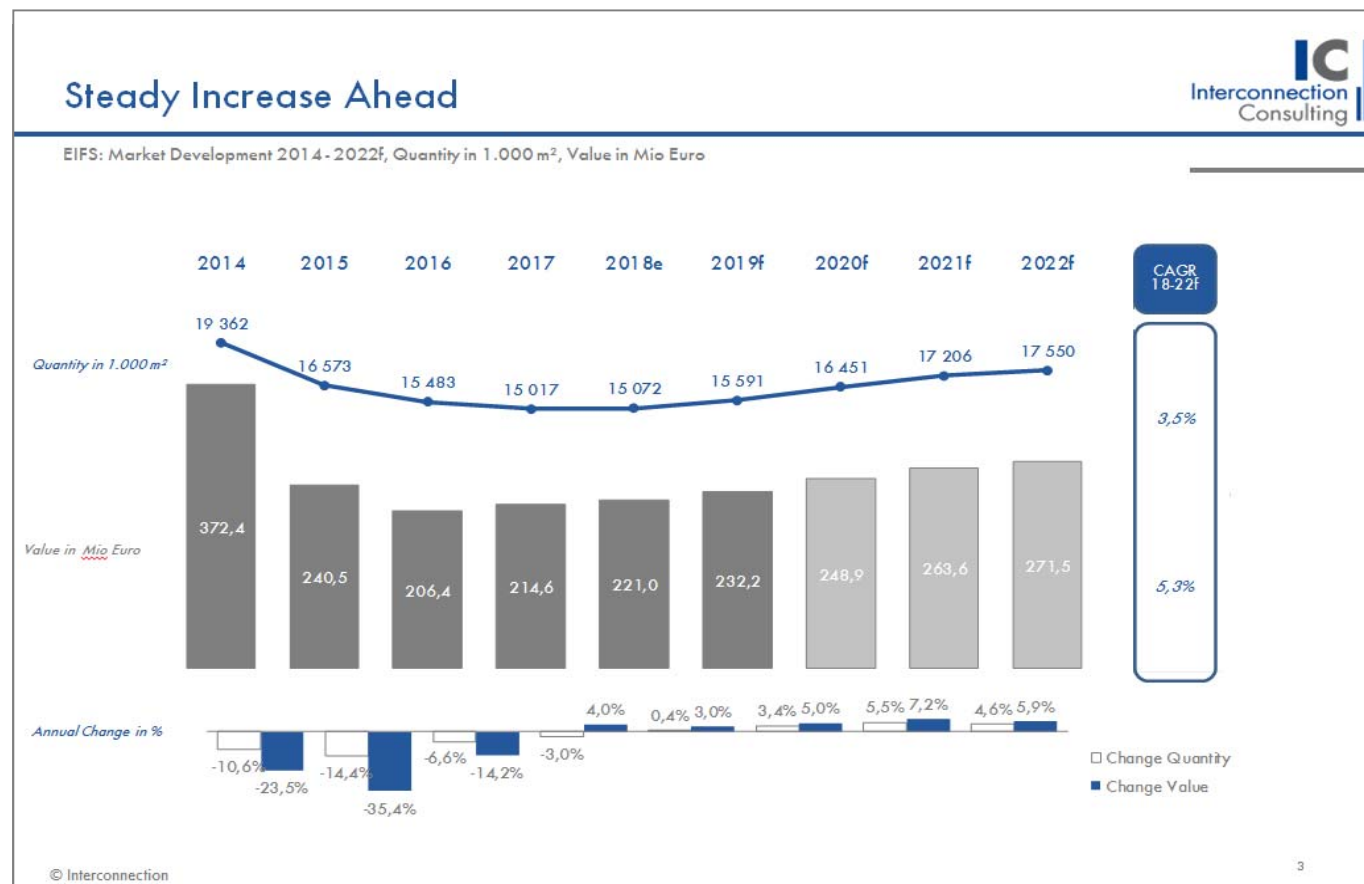
- *This chart shows dummy figures.*
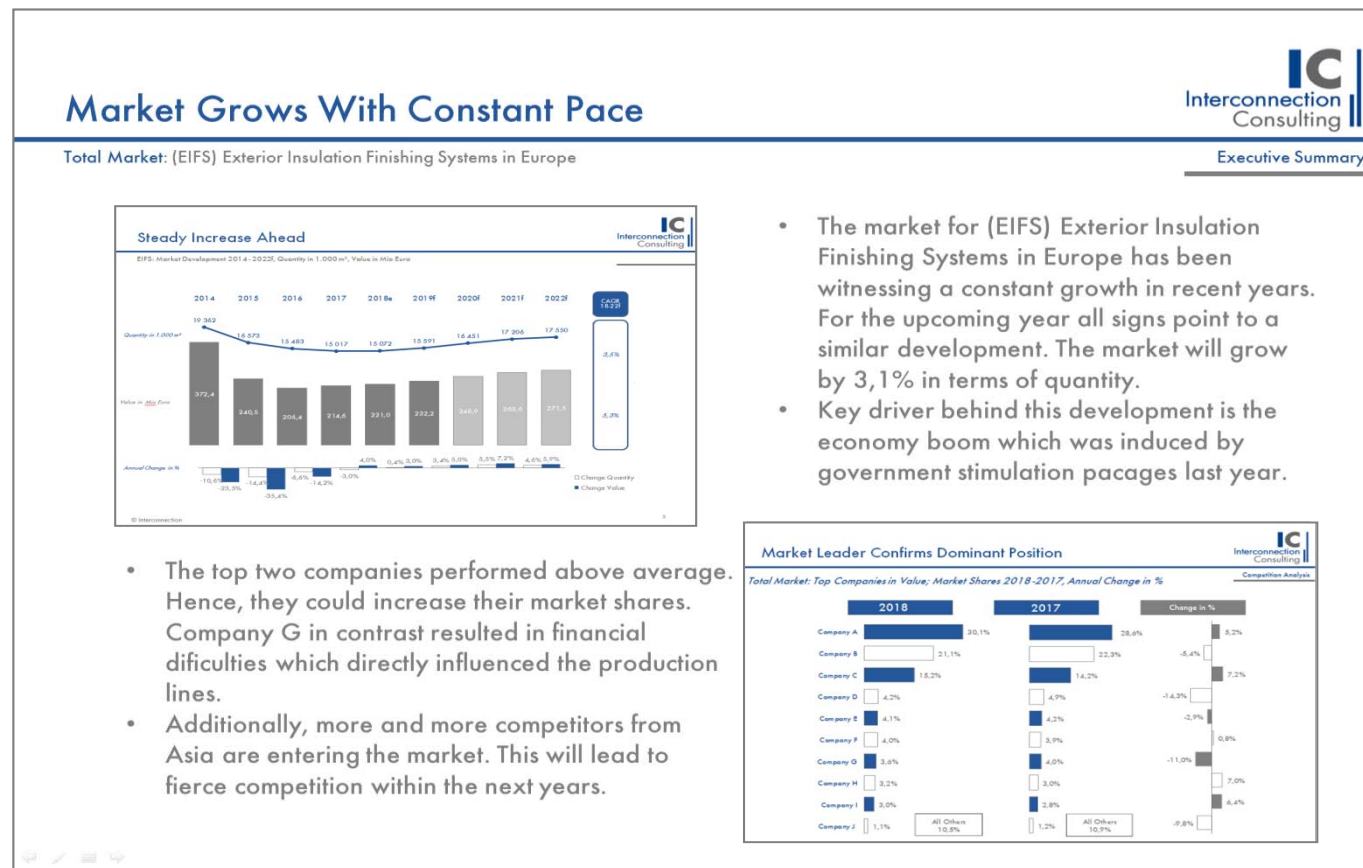
Market Environment Data of Our Forecasting Model

- 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.*

Construction Activity Accelerating Due to Increasing Housing Demand in Metropols

Construction Activity

Building Forecast: Building Completions VS. Building Permits 2013 – 2021f in Dwelings, Annual Change in %

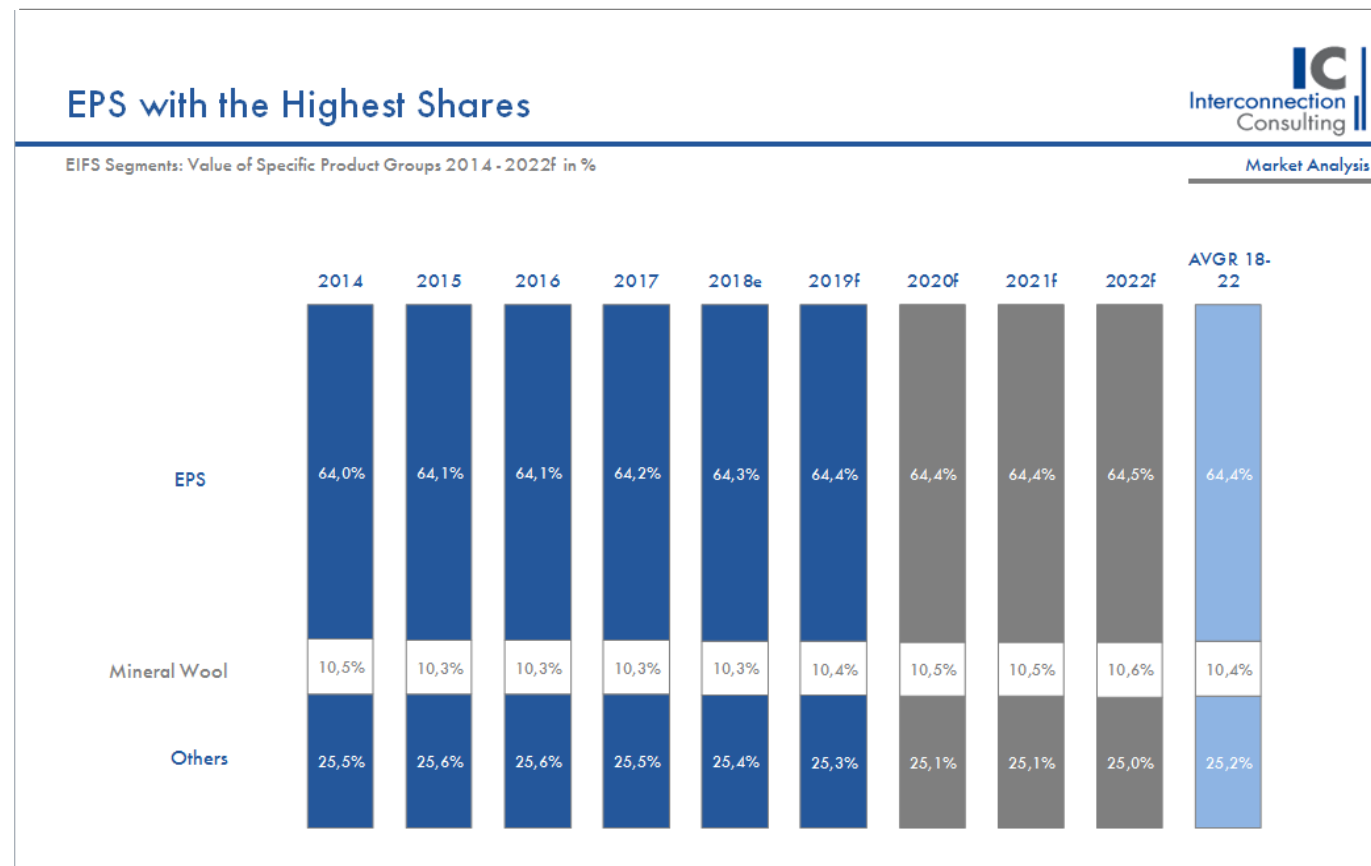|	2013	2014	2015	2016	2017	2018e	2019f	2020f	2021f
Residential Building Completions	253.987	222.239	202.459	195.373	212.742	251.886	278.334	301.714	318.610
Building Permits	188.942	180.440	173.944	184.033	200.453	231.323	255.149	270.713	282.083
Annual Change	-4,5% / -12,5%	-3,6% / -8,9%	5,8% / -3,5%	15,6% / 2,6%	18,4% / 15,4%	10,5% / 10,3%	8,4% / 6,1%	5,6% / 4,2%	

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.*

Steady Increase Ahead

EIFS: Market Development 2014-2022f, Quantity in 1.000 m², Value in Mio Euro

	2014	2015	2016	2017	2018e	2019f	2020f	2021f	2022f	CAGR 18-22f
Quantity in 1.000 m²	19 362	16 573	15 483	15 017	15 072	15 591	16 451	17 206	17 550	3,5%
Value in Mio Euro	372,4	240,5	206,4	214,6	221,0	232,2	248,9	263,6	271,5	5,3%

Annual Change in %

-10,6% / -23,5% -14,4% / -35,4% -6,6% / -14,2% -3,0% 4,0% 0,4% / 3,0% 3,4% / 5,0% 5,5% / 7,2% 4,6% / 5,9%

☐ Change Quantity
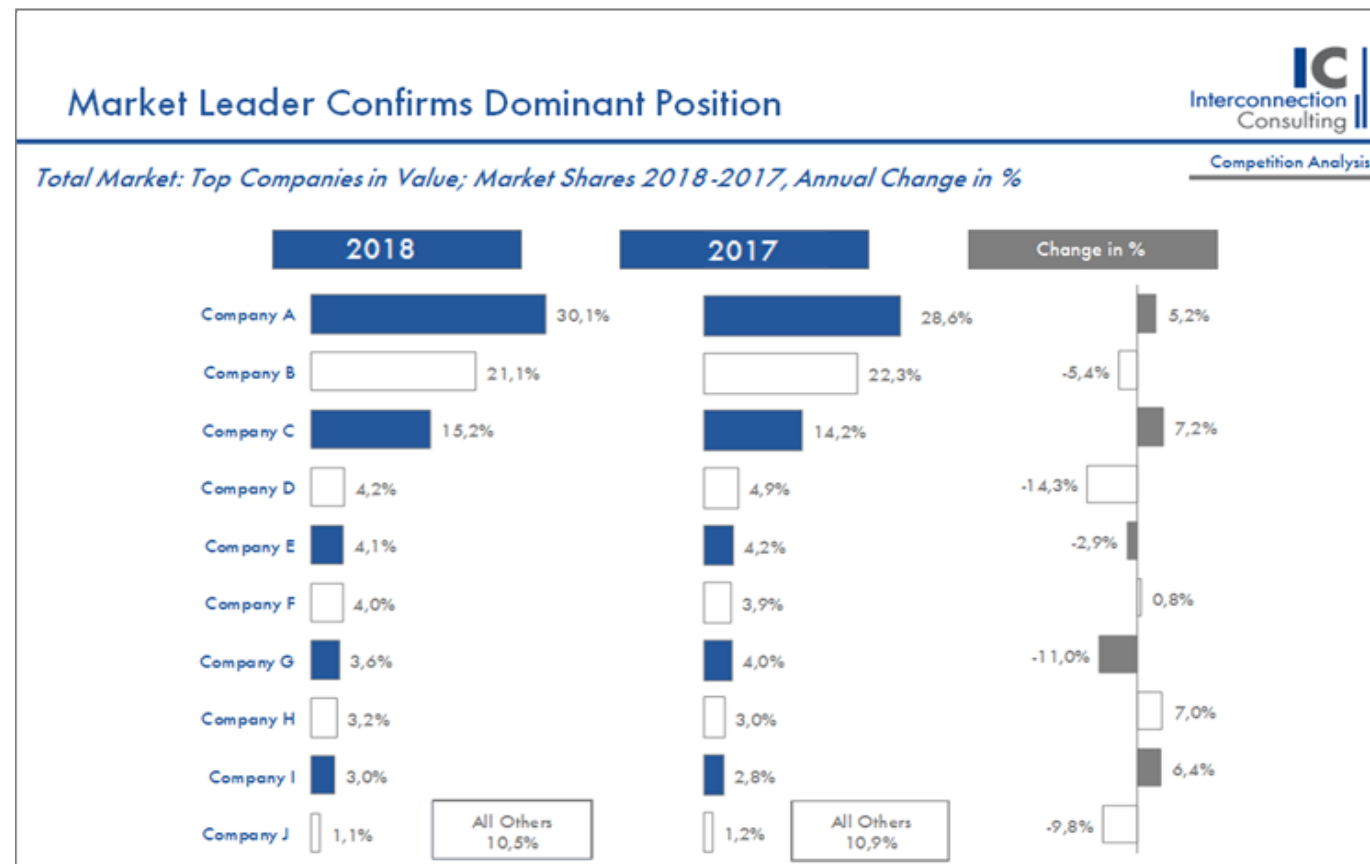■ Change Value

© Interconnection

Product Group Development

- 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.*

EPS with the Highest Shares

EIFS Segments: Value of Specific Product Groups 2014 - 2022f in %

	2014	2015	2016	2017	2018e	2019f	2020f	2021f	2022f	AVGR 18-22
EPS	64,0%	64,1%	64,1%	64,2%	64,3%	64,4%	64,4%	64,4%	64,5%	64,4%
Mineral Wool	10,5%	10,3%	10,3%	10,3%	10,3%	10,4%	10,5%	10,5%	10,6%	10,4%
Others	25,5%	25,6%	25,6%	25,5%	25,4%	25,3%	25,1%	25,1%	25,0%	25,2%

Competition Analysis and Market Shares

- 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.*

- *Only available for Market Tracking®*

Market Leader Confirms Dominant Position

Interconnection Consulting

Competition Analysis

Total Market: Top Companies in Value; Market Shares 2018 -2017, Annual Change in %

	2018	2017	Change in %
Company A	30,1%	28,6%	5,2%
Company B	21,1%	22,3%	-5,4%
Company C	15,2%	14,2%	7,2%
Company D	4,2%	4,9%	-14,3%
Company E	4,1%	4,2%	-2,9%
Company F	4,0%	3,9%	0,8%
Company G	3,6%	4,0%	-11,0%
Company H	3,2%	3,0%	7,0%
Company I	3,0%	2,8%	6,4%
Company J	1,1%	1,2%	-9,8%
	All Others 10,5%	All Others 10,9%	

Pivot Table

- 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)
Ø 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)
Ø 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

IC
Interconnection
Consulting

IC Market Tracking I Forecast® (EIFS) Exterior Insulation Finishing Systems in Europe 2017

	Single Issue	IC Subscription*	Scale of Discounts
Market Forecast®	€ 1.990,-		€ 5.000 -5%
All Regions MF®	€ 19.104,-	IC SUBSCRIPTION 20 % PRICE ADVANTAGE	€ 10.000 -10%
Market Tracking®	€ 2.990,-		€ 15.000 -10%
All Regions MT®	€ 28.704,-		€ 20.000 -20%

Available countries

GER	AUT	SUI	NET	ITA	UKR	ESP	RUS
FRA	POL	SWE	BEL	SVK	HUN	CZK	ROU

Prices shown without VAT or any other applicable taxes.

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 windows and constructions industries.

- 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 permament 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

Jan Hudak– Market Analyst

Tel: :+43 1 375 00 12

Fax: +43 1 5854623 -30

hudak@interconnectionconsulting.com

Andreas Erdpresser– Managing Director

Tel: + 43 1 375 00 15 10

Fax: +43 1 5854623 -30

erdpresser@interconnectionconsulting.com

Interconnection Consulting   I   Vienna • Oberstdorf • Lviv • Bratislava

www.interconnectionconsulting.com

we show you the way

Factsheet: (EIFS) Exterior Insulation Finishing Systems in Europe 2017

IC Interconnection Consulting

Included in the Report
- interactive PDF, Pivot Tables
- Pages (approx.) 75/ per Country
- Optional: Hard Cover: 150 €

Price
- Single Country Forecast: 1.990 €
- Single Country Tracking: 2.990 €

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, 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:
Austria, Belgium, Czech Republic, France, Germany, Hungary, Italy, Netherlands, Poland, Slovakia, Spain, Sweden, Switzerland, Ukraine, Russia, Romania

Product groups
EPS, Mineral Wool, Others

Finish Coat
Plaster, Others

Insulation Thickness
< 10 cm, > 10 cm

Customer Segments
Residential, Non-residential

Business Segments
New Construction, Renovation

Distribution Channels
Direct, Indirect

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.

Order Form

IC
Interconnection
Consulting

Yes, we would like to order the
IC Market Forecast®/Tracking® Exterior Insulation Finishing Systems 2019
(Please, print out the order form and mark your desired products)

IC SUBSCRIPTION 20 % PRICE ADVANTAGE

Market Forecast ®:	Single Issue
☐ Germany	1.990,- EUR
☐ Austria	1.990,- EUR
☐ Switzerland	1.990,- EUR
☐ France	1.990,- EUR
☐ Italy	1.990,- EUR
☐ Spain	1.990,- EUR
☐ Hungary	1.990,- EUR
☐ Sweden	1.990,- EUR
☐ Slovakia	1.990,- EUR
☐ the Czech Republic	1.990,- EUR
☐ Poland	1.990,- EUR
☐ Ukraine	1.990,- EUR
☐ Belgium	1.990,- EUR
☐ the Netherlands	1.990,- EUR
☐ Romania	1.990,- EUR
☐ Russia	1.990,- EUR

Market Tracking®:	Single Issue
☐ Germany	2.990,- EUR
☐ Austria	2.990,- EUR
☐ Switzerland	2.990,- EUR
☐ France	2.990,- EUR
☐ Italy	2.990,- EUR
☐ Spain	2.990,- EUR
☐ Hungary	2.990,- EUR
☐ Sweden	2.990,- EUR
☐ Slovakia	2.990,- EUR
☐ the Czech Republic	2.990,- EUR
☐ Poland	2.990,- EUR
☐ Ukraine	2.990,- EUR
☐ Belgium	2.990,- EUR
☐ the Netherlands	2.990,- EUR
☐ Romania	2.990,- EUR
☐ Russia	2.990,- EUR

☐ 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: 5.000,- EUR   5%

From: 10.000,- EUR   10%

From: 15.000,- EUR   15%

From: 20.000,- EUR   20%

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 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