



IC Market Tracking®

Sandwich Panels in Europe 2020

- Germany
- Austria
- Italy
- France
- Poland
- Czech Republic
- Slovakia

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2016 – 2019 for the total market development as well as
 - Product Groups
 - Application Areas
 - Building Types
 - Insulation Thickness
 - Business Segments
- Forecasts from 2020 – 2023 for the total market as well as each analyzed product group and segment
- Annually updates of the data

COMPETITION ANALYSIS

- Market shares of the top players for 2018/19
 - Market Shares on the total market in value and quantity
 - Market Shares per product groups and segments in quantity

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.
- Continuous updates of the data



Market & Competition Analysis

Market Volume

Market Growth

Trends

Market Shares

What Do You Get - Your Benefits at a Glance

Presentation of the Data and Deliverables

Market Intelligence Tool Access and Deliverables



ONLINE-COCKPITS

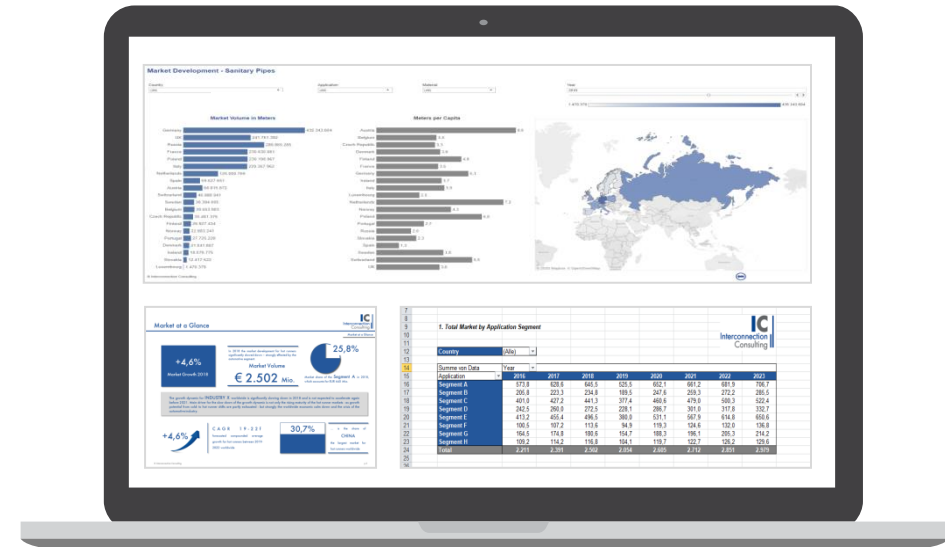
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of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

EXECUTIVE REPORTS

- PDF 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

PIVOT-TABLES

- MS-Excel pivot-table including all raw data of the report
 - Market-Forecast pivot table
 - Competition pivot table



Market Intelligence Tool and Reports



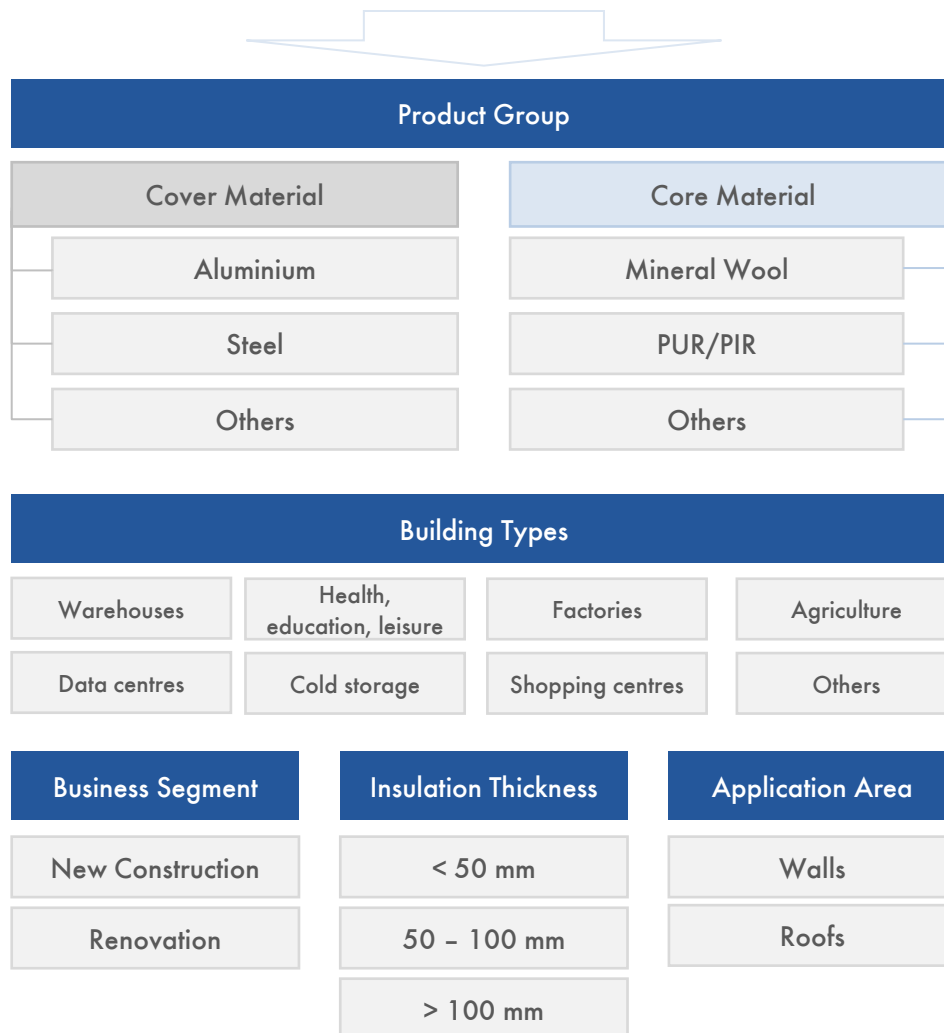
Online Dashboards

Executive Reports

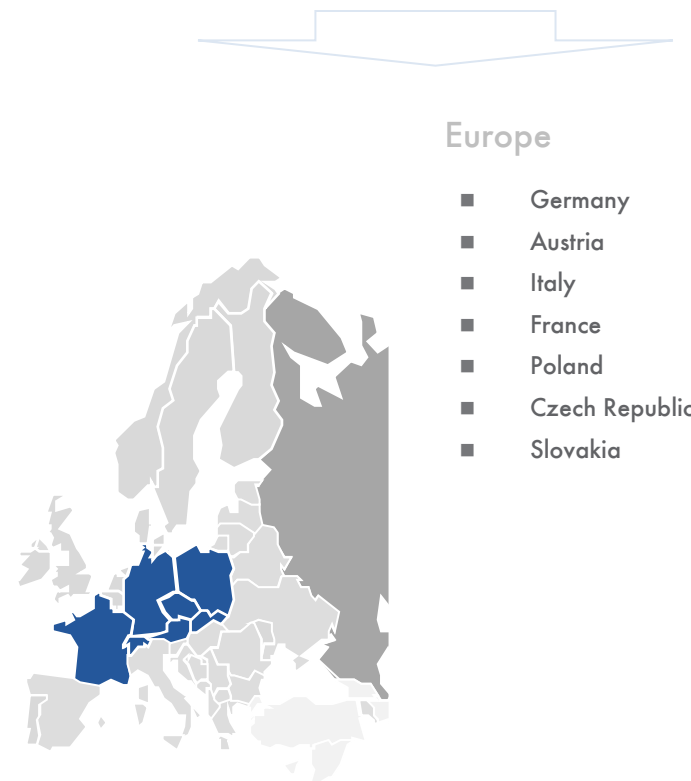
Pivot Tables

IC Market Tracking® Sandwich Panels in Europe 2020

Market Report Structure

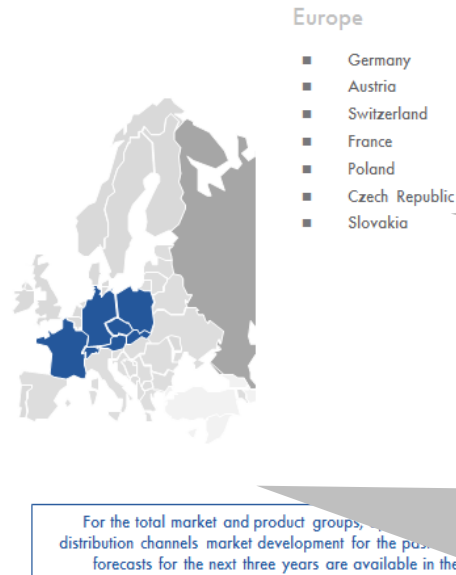


Available Countries



For the total market and product groups, application types and distribution channels market development for the past three years and forecasts for the next three years are available in the report.

Market Structure - Interpretation



- Market data is available for each country separately as well as aggregated for the country package purchased.
- Each country report includes data for product groups, building types, business segments, insulation thickness and application areas separately as well as aggregated for the total market of sandwich panels in terms of value and quantity.
- Product groups are further broken down by cover material and core material.

Definitions and Demarcation

Cover Material	Turnover is stated in Mio. Euro. Values are always Net-Turnovers (No List-Prices), discounts included; Quantity in 1.000 m ²
Steel	Sandwich panels with cover sheets made of steel
Aluminium	Sandwich panels with cover sheets made of aluminium
Other	Sandwich panels with cover sheets made of other materials, e.g. wood
Core Material	
Mineral	Panels with a main content of insulation material made from molten mineral or rock materials
PUR/PIR	Panels with a main content of synthetic insulation materials, such as polyurethane rigid foam or polyisocyanurate
Other	Panels with a main content of other insulation materials, such as EPS (expanded polystyrene)
Insulation thickness	
< 50 mm	Sandwich panels with an insulation thickness of under 50 mm, including the cover
51 mm – 100 mm	Sandwich panels with an insulation thickness between 51 and 100 mm , including the cover
> 100 mm	Sandwich panels with an insulation thickness bigger than 100 mm , including the cover



Business Segment

New Construction

Sandwich panels used on newly erected buildings

Renovation

Sandwich panels used in the renovation of existing constructions

Building types

Warehouses

Commercial storage facilities

Factories

Production halls of all kinds

Cold Storage

Cool store / cold store: large refrigerated rooms or buildings designed for storage of goods

Data Centres

Facilities used to house computer systems

Shopping Centres

Shopping malls of all types

Agriculture

Buildings with an agricultural purpose

Health, education, leisure

Hospitals, hospices, spas, schools and buildings of a related purpose

Other

All other building types, e.g. airports, train stations, trade show booths, residential dwellings etc.

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 Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer 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!”

The Market Intelligence Tool

Dashboards - The Best Way to Work with Data

A picture says more
than 1000 words

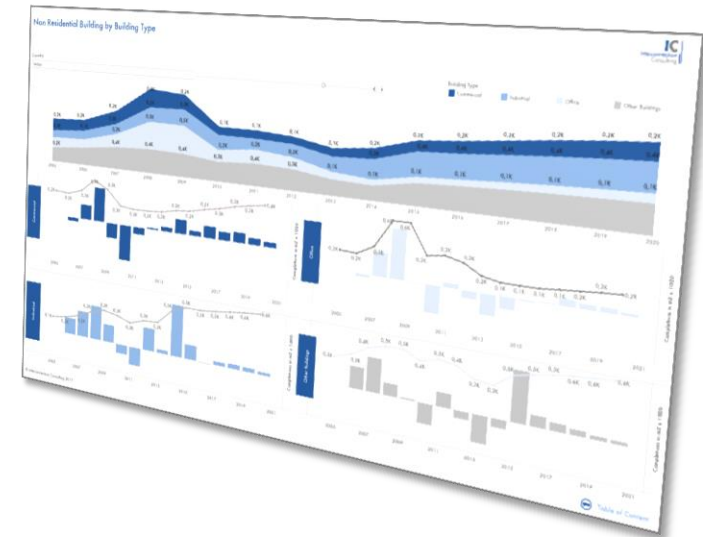
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

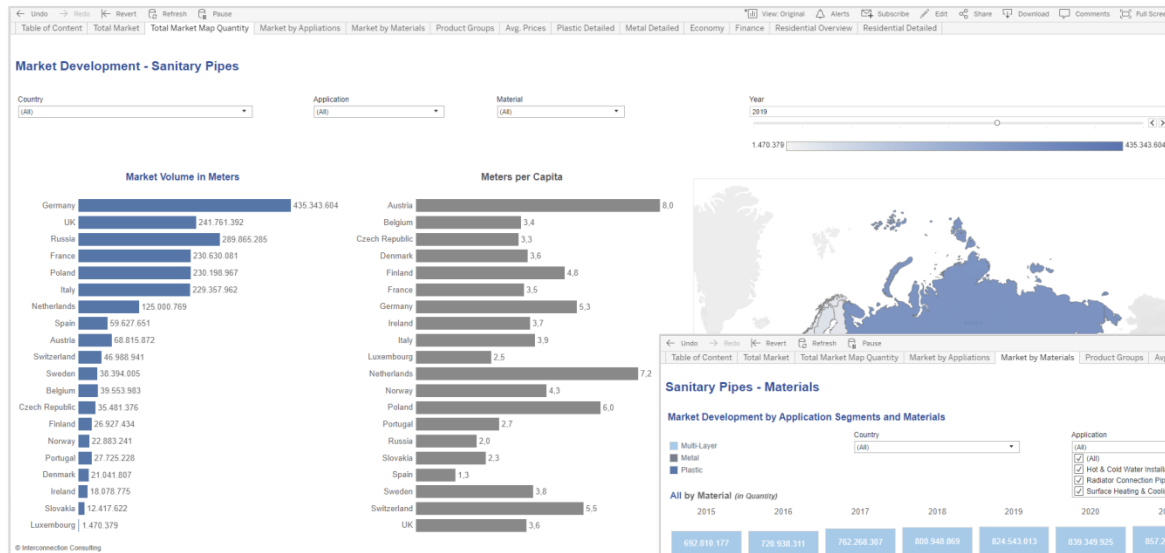
- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online
accessability

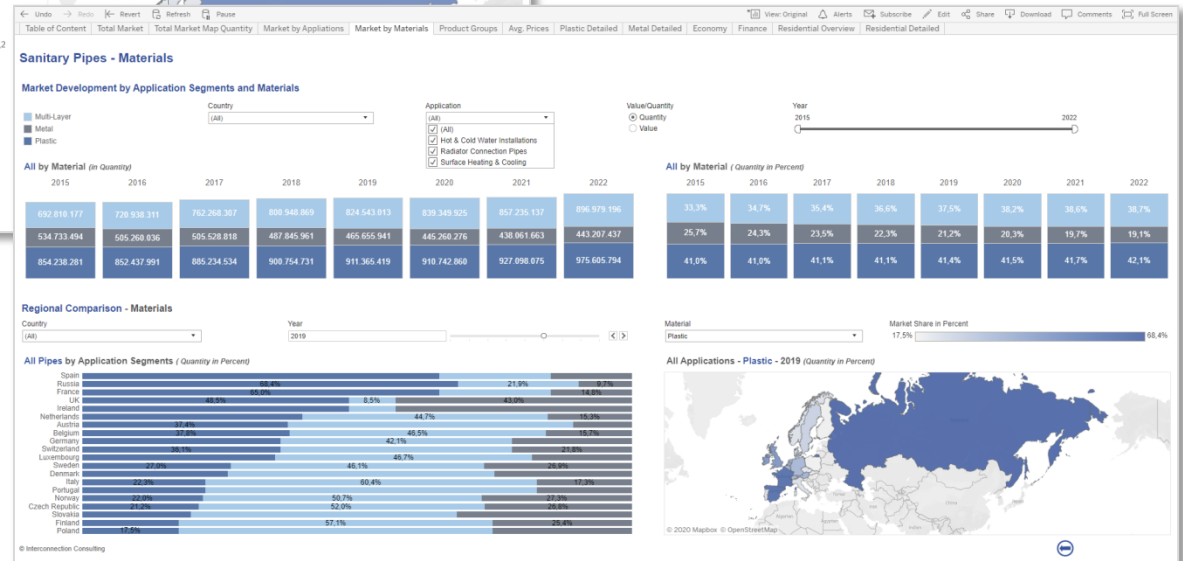
- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file



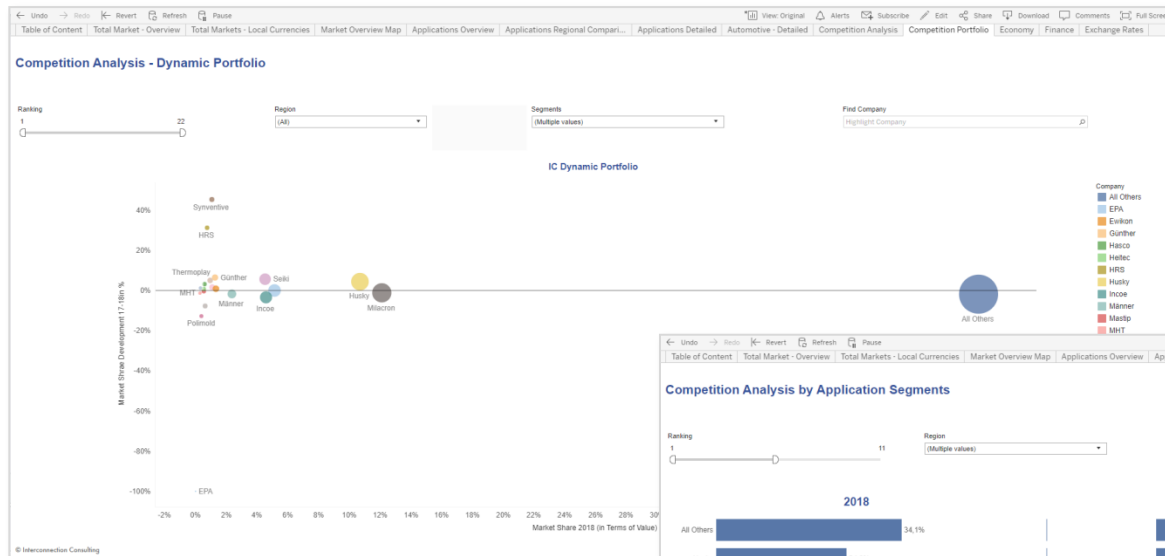
Sample Cockpits for Market Analysis Data



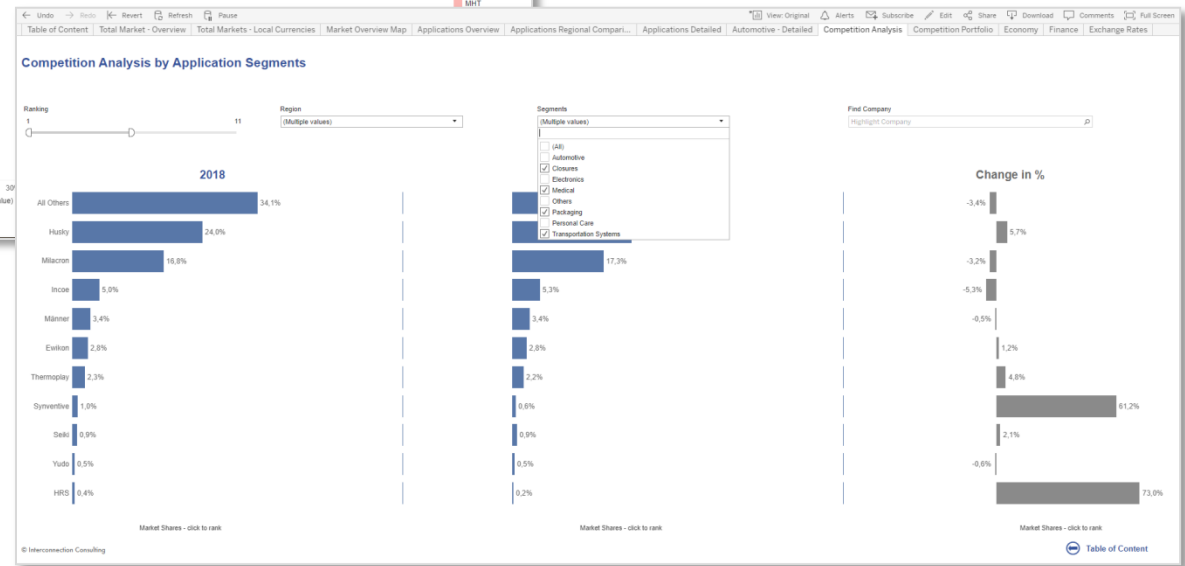
This chart contains fictive data



Sample Cockpits for Competition Data



This chart contains fictive data





Market at a Glance

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Market at a Glance

+4,6%
Market Growth 2018

In 2018 the market development for hot runners significantly slowed down – strongly effected by the automotive segment.

Market Volume
€ 2.502 Mio.

25,8%
Market share of the which accounts for EU

Worldwide Automotive

+4,6%

CAGR 19-22 f
forecasted compounded average growth for hot runners between 2019-2022 worldwide

30,7%

The growth dynamic for **INDUSTRY X** worldwide is significantly slowing down in 2018 and is not expected before 2021. Main driver for the slow down of the growth-dynamic is not only the rising maturity of the hot runners, potential from cold to hot runner shifts are partly exhausted - but strongly the worldwide economic calm down of automotive industry.

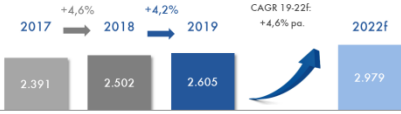

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Rest of the

Worldwide Economic Calm Down and the Automotive Market Growth

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Executive Summary

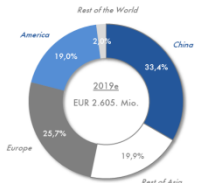
Market Worldwide (Value in Mio. EUR)



2017 → 2018 → 2019 → 2022f

2,391 → 2,502 → 2,605 → 2,979

+4,6%
+4,2%
CAGR 19-22f: +4,6% pa.



2019a

EUR 2.605. Mio.

Europe 35,7%
Asia 34,4%
North America 19,0%
Rest of Asia 19,9%
Rest of the World 2,0%

Rest of the World
America
China
Europe
Rest of Asia

The worldwide hot runner market recorded a growth of 4,6% in 2018 which is a further significant slow down of the market dynamic after the market development decreased from 14,8% [2015] down to 8,2% (2017). Furthermore, while between 2016-2018 mainly major markets like North America, Western Europe and Japan lagged behind concerning the market growth, in 2018 the growth slow down was observed worldwide.

Main drivers for this development are the general economic calm down as well as the crisis of the automotive industry. This is only the ongoing Brexit decision hampers the economic outlook for total Europe. The trade war between the US and China affects economies worldwide. Furthermore, the automotive industry set to crisis. As well as the shift from cold-to hot runners is well advanced in most markets.

For 2019 the worldwide market is expected to read:

	7	8	9	10	11
1. Total Market by App					

2021f (even though market development remains positive)

2022f:

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[illegible]

p.12

Investment Plan for Your Market Research

IC Market Tracking® Sandwich Panels In Europe 2020

Prices & Conditions

	Subscription *	Single Issue	Scale of Discounts	
Single Country	€ 2.950,-	+25% for Single Issues	€ 5.000	-5%
All Countries **	€ 17.553,-		€ 10.000	-10%
			€ 15.000	-15%

Available Countries	Germany	Austria	Italy	France
	Poland	Czech Republic	Slovakia	



* IC 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 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.

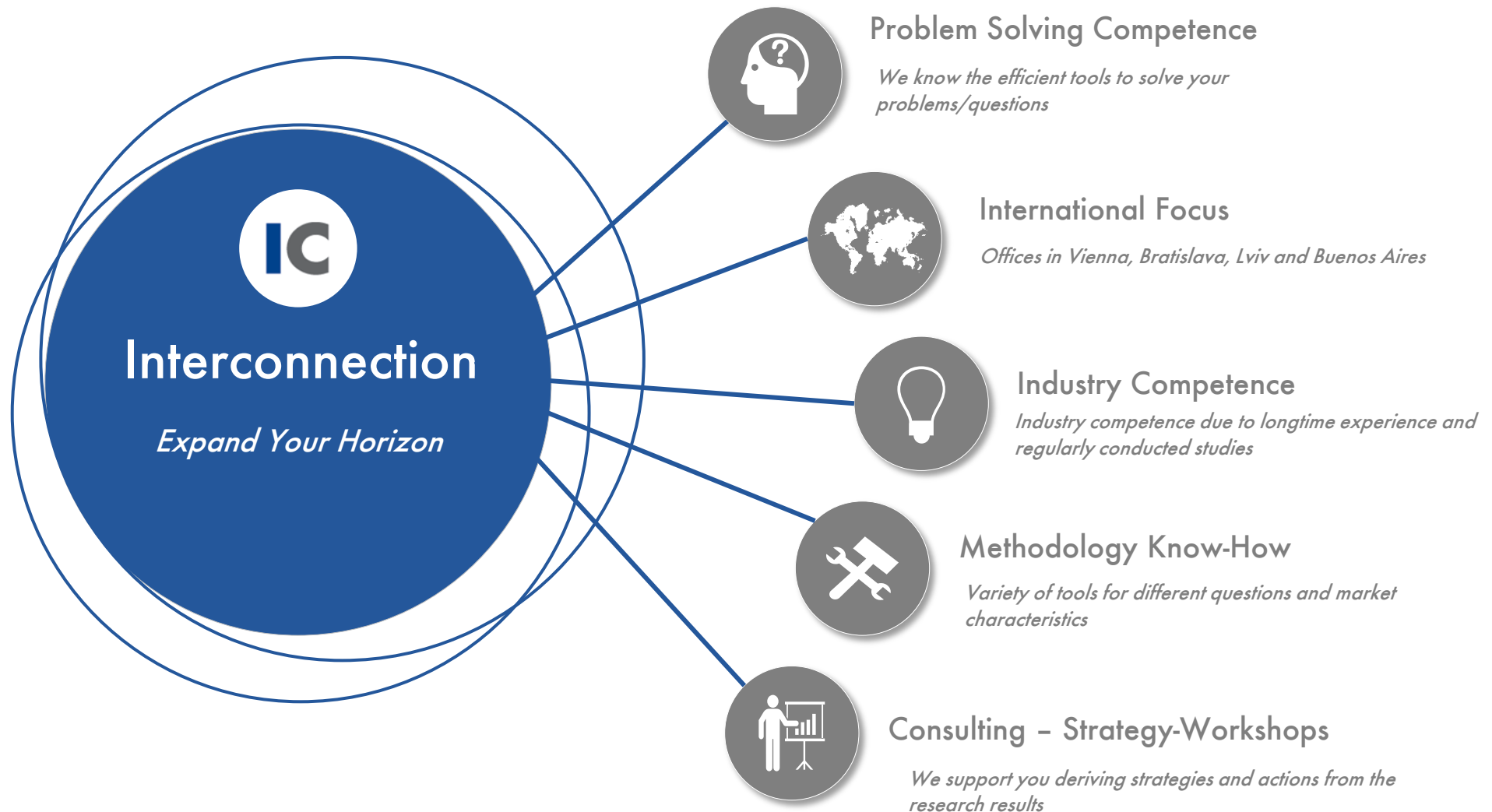
The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of an subscription.

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

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe





Our Market-Intelligence Tools



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

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Yes, we would like to order the IC Market Tracking® Sandwich Panels in Europe 2020

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

Please choose from the available countries

☐ Germany

☐ Austria

☐ Italy

☐ France

☐ Poland

☐ Czech Republic

☐ Slovakia

☐ Subscription* EUR 2.950.- / Country

☐ Single Issue EUR 3.688.- / Country

	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:
(please fill in the data completely)

Company: _____

Name: _____

Address: _____

Post Code/Zip: _____

Country: _____

VAT identification number: _____

E-Mail: _____

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

Company: _____

Name: _____

Address: _____

Post Code/Zip: _____

Country: _____

E-Mail: _____

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 31st December. 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.

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General Terms of Business

Payable on receipt of invoice without discount.

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The report purchased is based on a specific methodology, which description is available for the customer on request and which fulfillment is the basis of this contract.

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All prices shown exclude sales tax.

Interconnection reserves the right to use the clients' logo as reference until written revocation.

Scale of discounts

From € 5.000,-	5%
From € 10.000,-	10%
From € 15.000,-	15%