

**IC Market Tracking®**  
Sandwich Panels in  
Europe and USA 2024

## Company Profiles



## Interactive Dashboards



## Market Drivers



automatically updated

# More than just a report – A TOOL FOR SUCCESS!

## Detecting Market Potential



## GEO-Maps



## Benchmarks



## Strategic Workshops



on request

# What Do You Get - Your Benefits at a Glance

## Content of the Report

### Market Data, Insights and Expertise...



#### MARKET ANALYSIS

- Historical market data from 2020 – 2023 for the total market development as well as
  - Product Groups
  - Building Types
  - Business Segments
  - Insulation Thickness
  - Application Areas
- Forecasts from 2024 – 2027 for the total market as well as each analyzed product group and segment
- Annual updates of the data

#### COMPETITION ANALYSIS

- Market shares of the top players for 2023/2022
  - 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, building forecast, 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

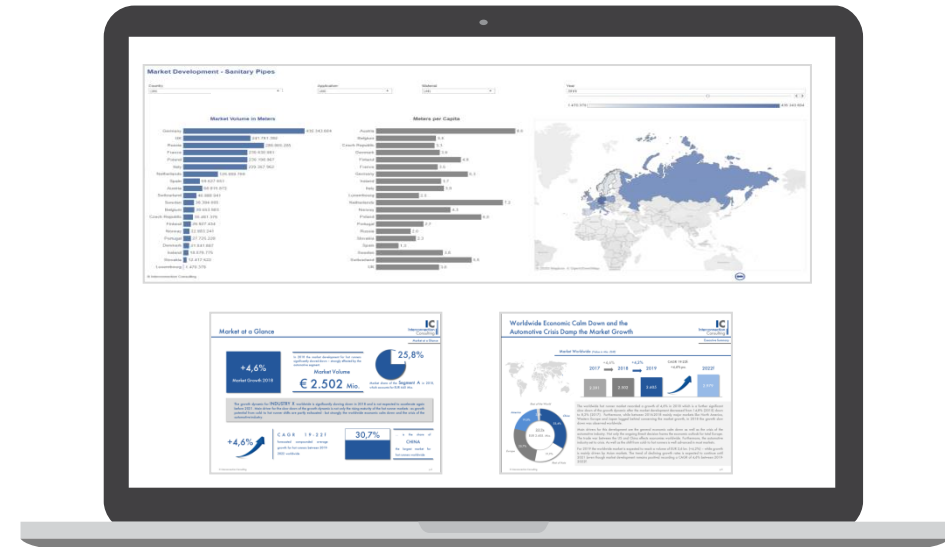


#### ONLINE-COCKPITS

- 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

- Executive summary dashboards 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



Market Intelligence Tool and Reports

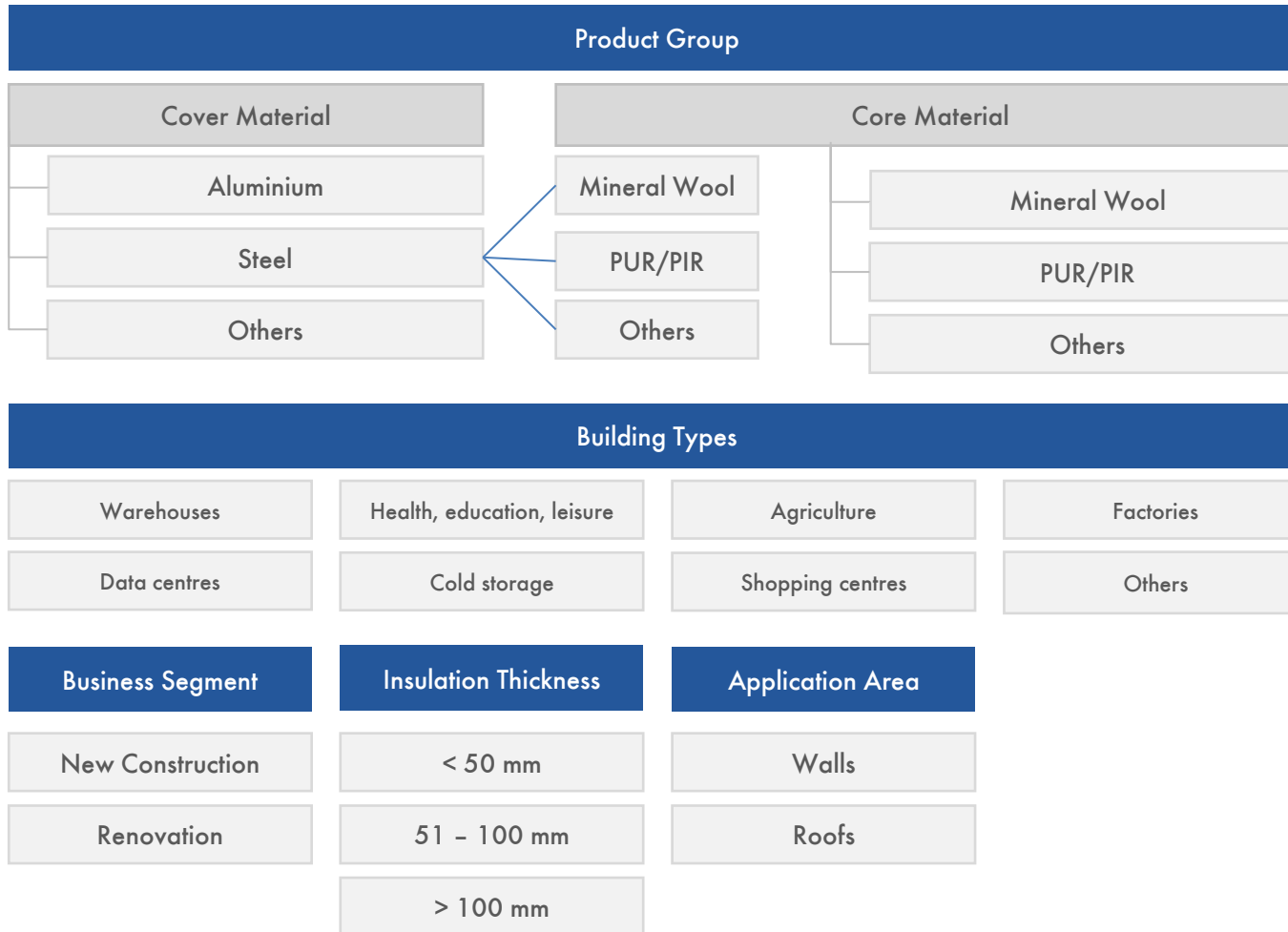


Online Dashboards

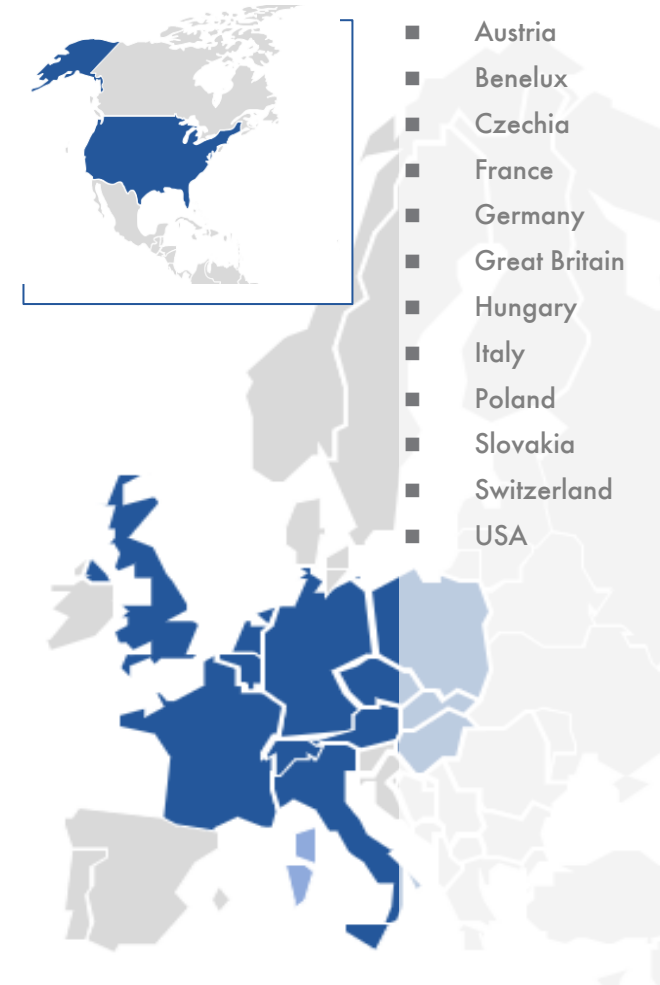
# IC Market Tracking®

## Sandwich Panels in Europe and USA 2024

### Market Report Structure

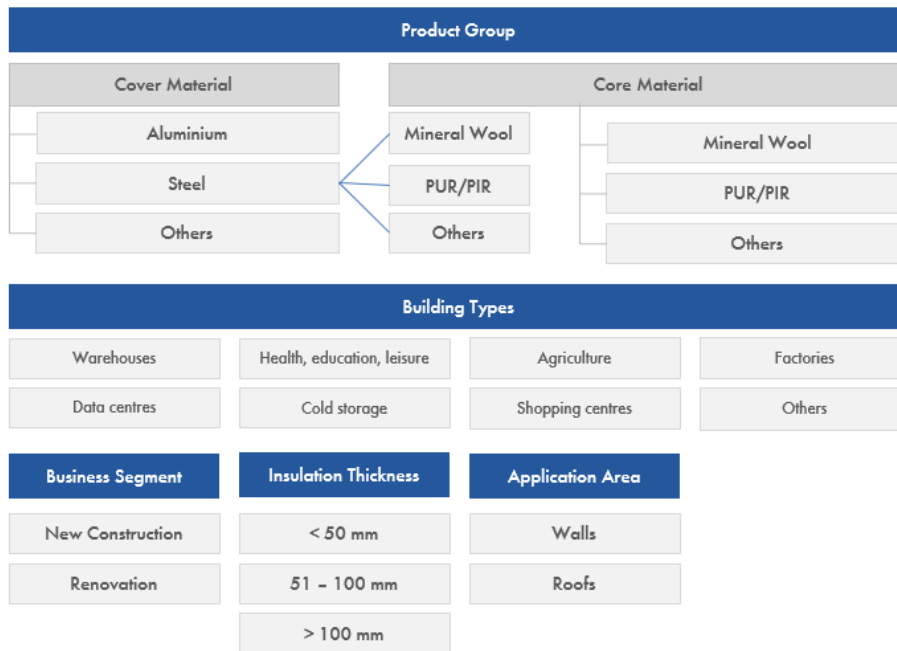


### Available Countries

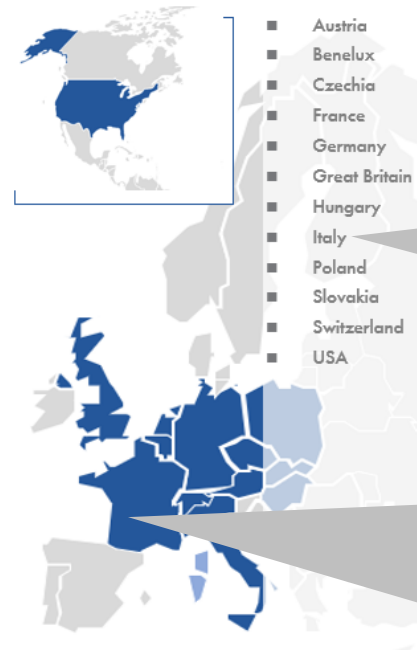


# Market Structure - Interpretation

Market Report Structure



Available Countries



- 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 <sup>2</sup> |
|----------------------|---|
| 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 Wool         | 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 (incl.), including the cover   |
| > 100 mm             | Sandwich panels with an insulation thickness more than 100 mm, including the cover  |



# 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

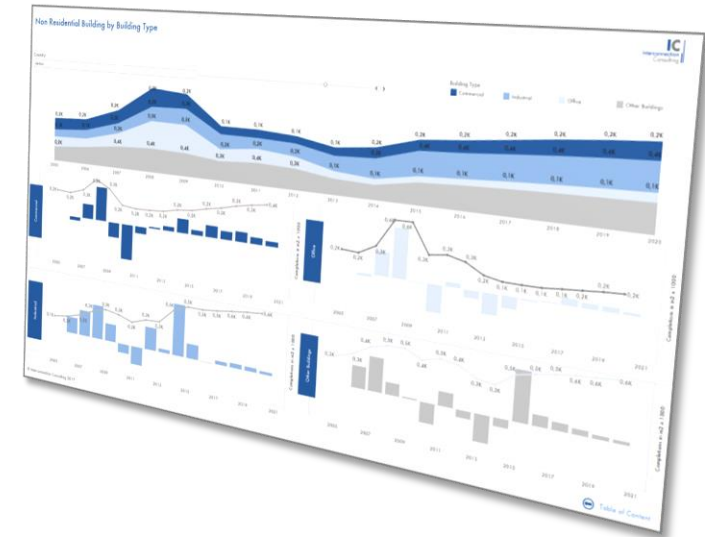
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

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

Easy online accesibility

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

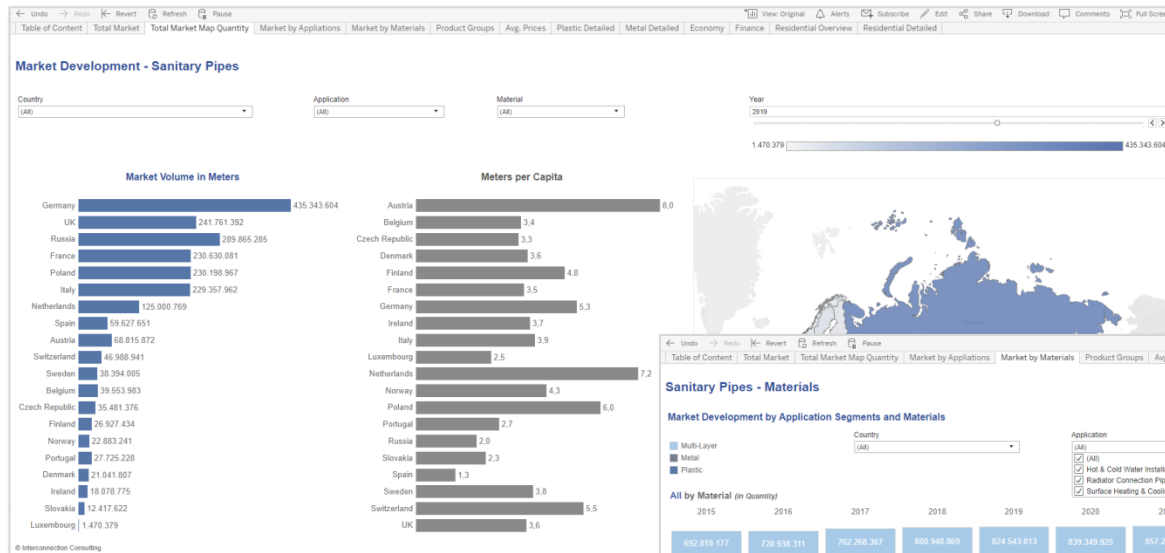


# Usability of the Market Intelligence Tool

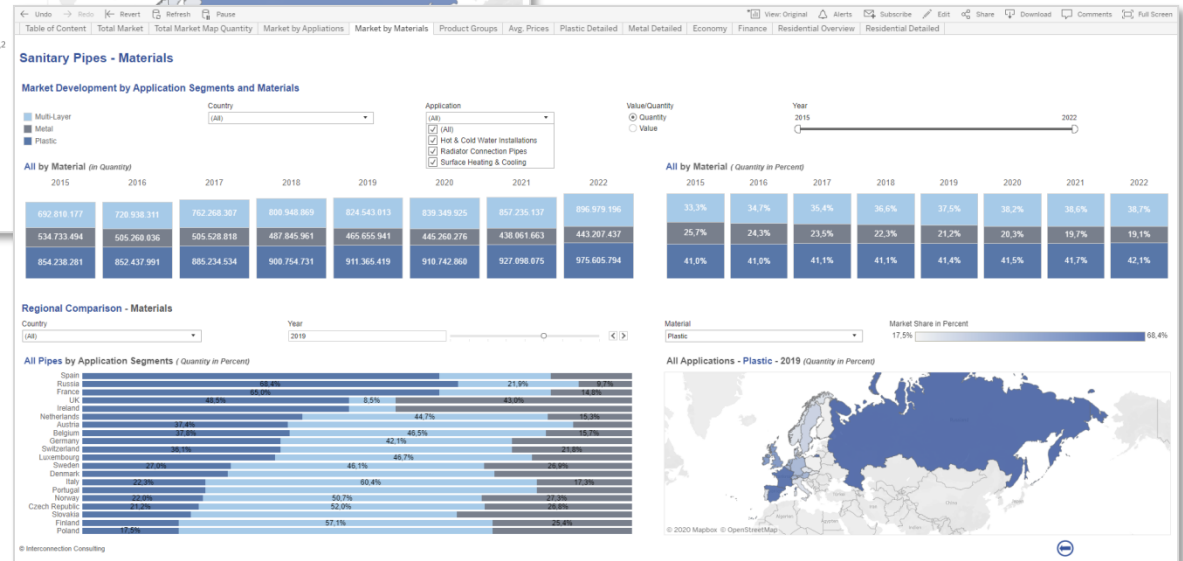
## Let's Put it in a Video...



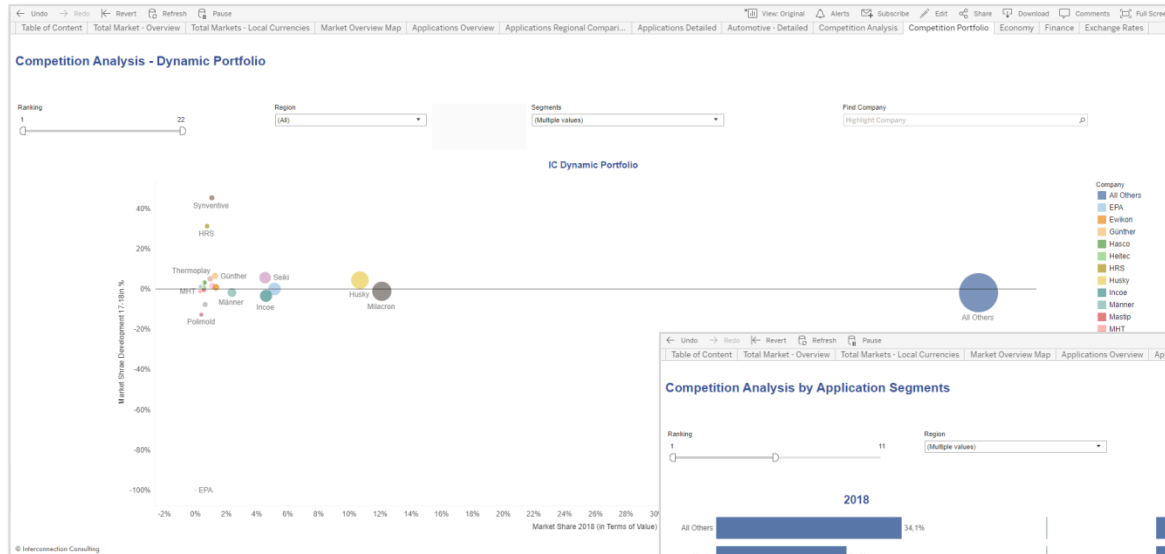
# Sample Cockpits for Market Analysis Data



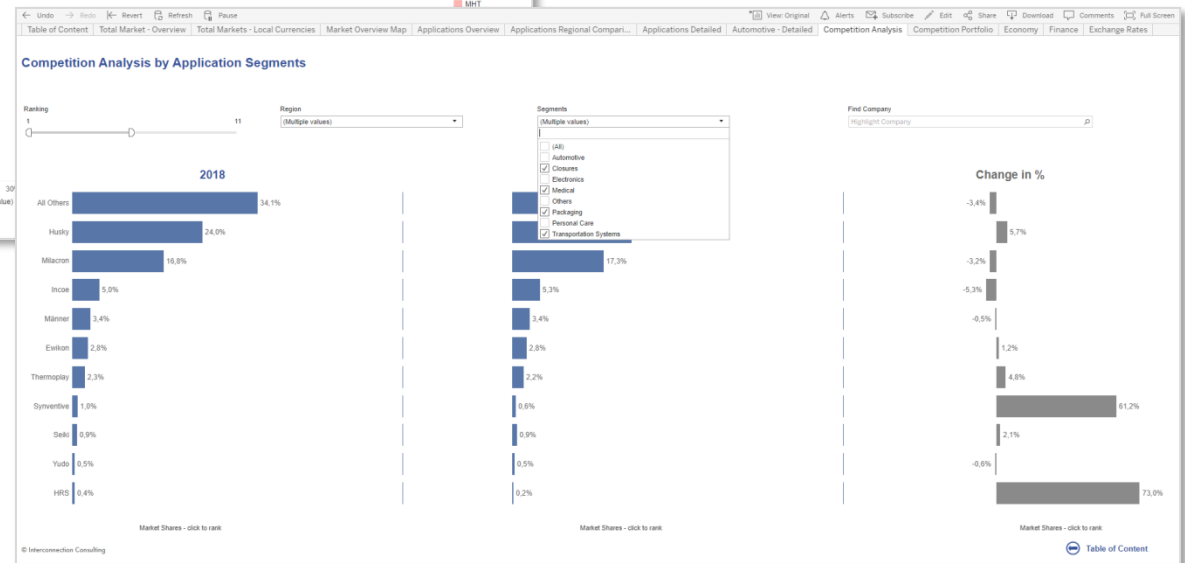
*This chart contains fictive data*



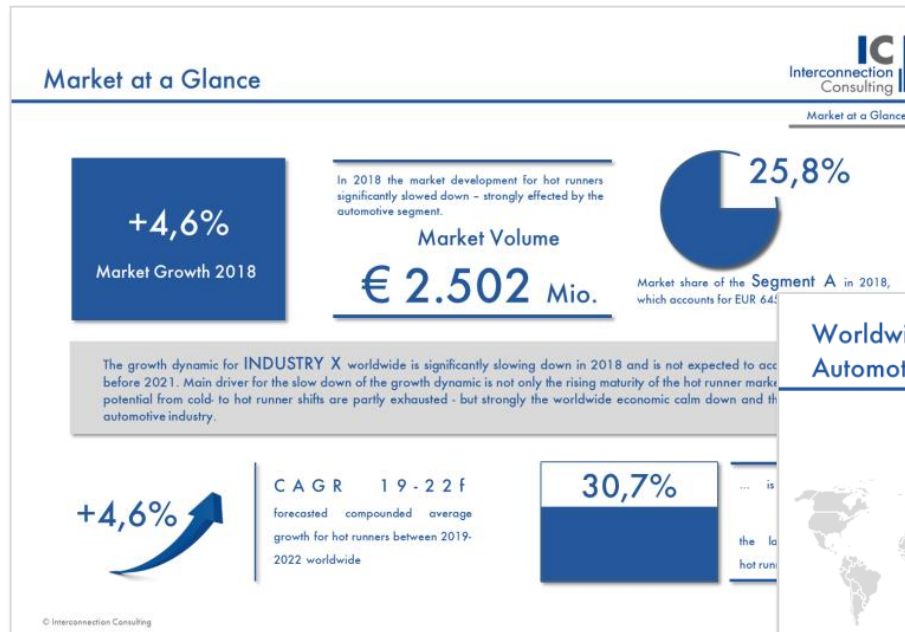
# Sample Cockpits for Competition Data



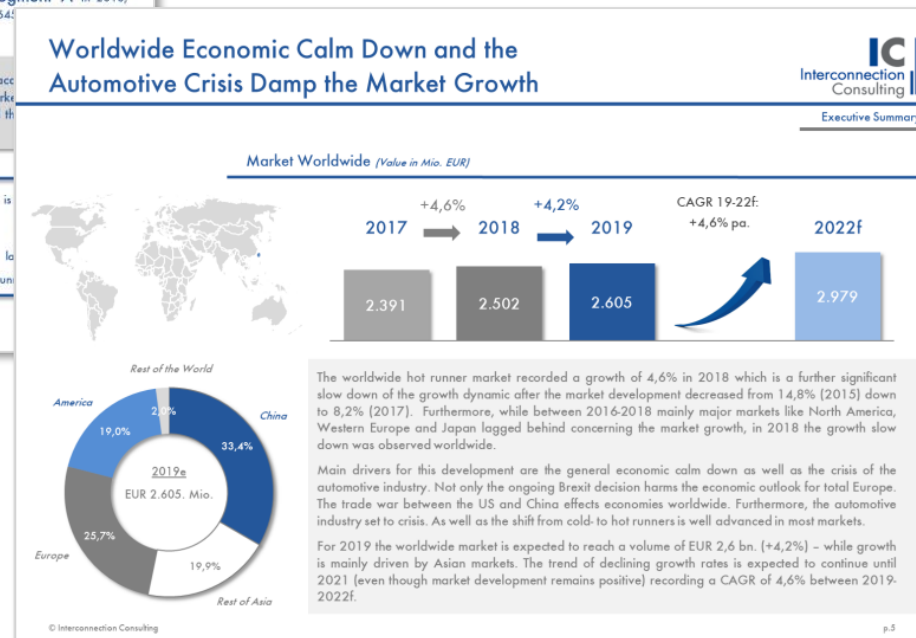
*This chart contains fictive data*



# Additional Deliverables - Executive Summary



Executive Summary as part of Tableau (fictive data)



Executive Summary as part of Tableau (fictive data)

# Investment Plan for Your Market Research

IC Market Tracking® Sandwich Panels in Europe and USA 2024

Prices & Conditions

|                            | Subscription* |
|----------------------------|---------------|
| Single Country             | € 3.999,-     |
| USA                        | € 5.999,-     |
| 3 Countries of Your Choice | € 9.999,-     |
| Europe                     | € 27.999,-    |
| All Countries              | € 31.999,-    |



## Available Countries

- Austria
- Benelux
- Czechia
- France
- Germany
- Great Britain
- Hungary
- Italy
- Poland
- Slovakia
- Switzerland
- USA

### Subscription:

- The price is the individual price for each edition, at least two orders of the study (order year and the following year). Price changes for the next edition must be announced by Interconnection Consulting 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.
- If you have selected single issue (no subscription price advantage) the contract is valid for 12 months.
- Our products/studies will be usually delivered as online dashboards in a common web browser, based on the BI Tool "Tableau" and include one named user license. You have access to these dashboards for the duration of your contract. If you need further licenses, the price is EUR 390,- per user and year. Reports, which as default delivered as online dashboards, can be requested as PDF versions for an additional fee.

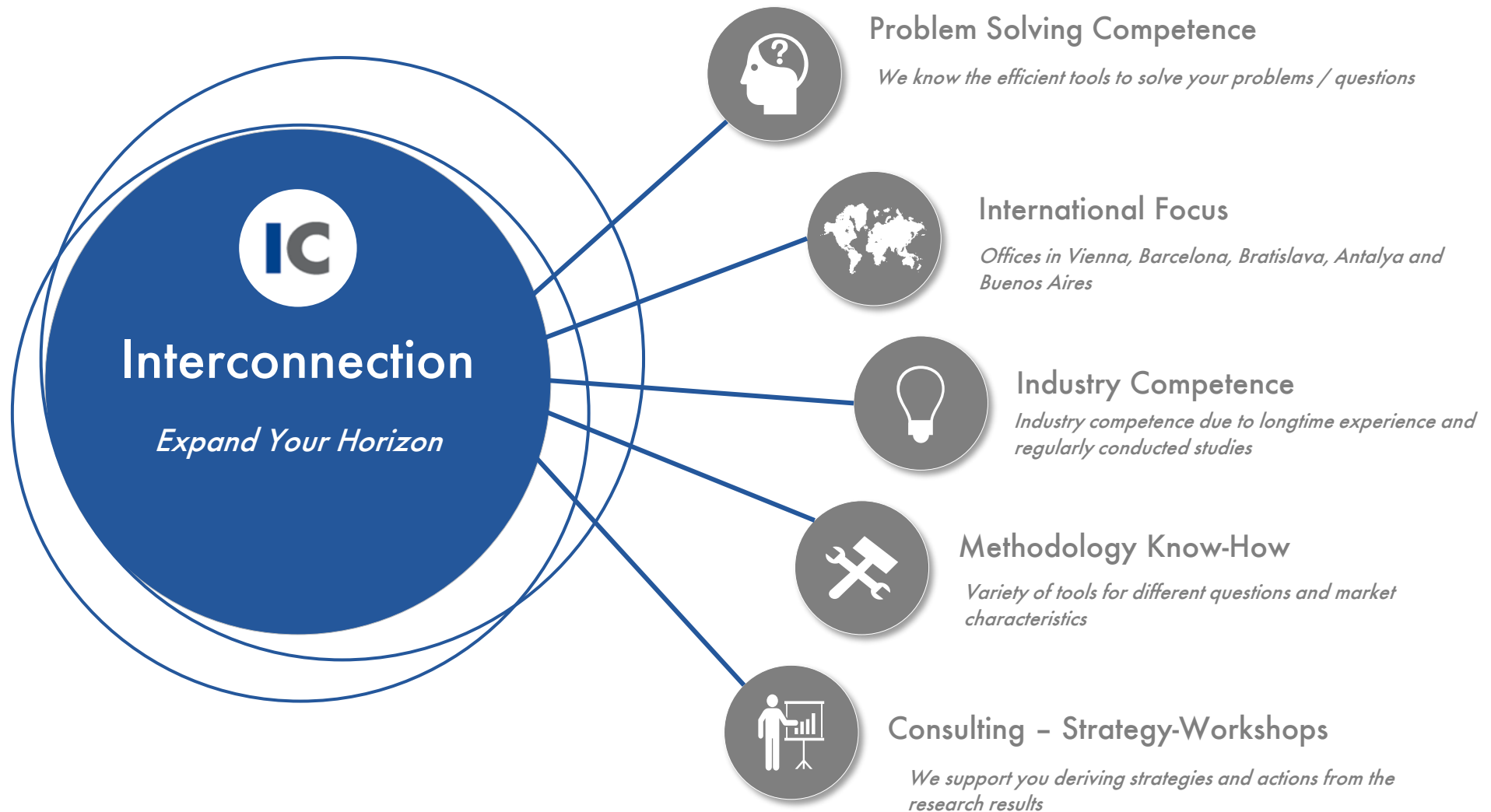
# Selected References

*"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



In case of any questions  
please do not hesitate to contact us!

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**Defining Growth  
Potential Since 1998**

## Yes, we would like to order the IC Market Tracking® Sandwich Panels in Europe and USA 2024

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

Please, choose from the available countries and package selection

- |                                  |  |                                  |                                      |
|----------------------------------|--|----------------------------------|--------------------------------------|
| <input type="checkbox"/> Austria | <input type="checkbox"/> France        | <input type="checkbox"/> Hungary | <input type="checkbox"/> Slovakia    |
| <input type="checkbox"/> Benelux | <input type="checkbox"/> Germany       | <input type="checkbox"/> Italy   | <input type="checkbox"/> Switzerland |
| <input type="checkbox"/> Czechia | <input type="checkbox"/> Great Britain | <input type="checkbox"/> Poland  | <input type="checkbox"/> USA         |
- 
- |  |              |
|--|--------------|
| <input type="checkbox"/> Single Country* | EUR 3.999,-  |
| <input type="checkbox"/> USA*            | EUR 5.999,-  |
| <input type="checkbox"/> 3 Countries*    | EUR 9.999,-  |
| <input type="checkbox"/> Europe*         | EUR 27.999,- |
| <input type="checkbox"/> All Countries*  | EUR 31.999,- |

|   | 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

Company: \_\_\_\_\_ Name: \_\_\_\_\_  
 Address: \_\_\_\_\_ Country: \_\_\_\_\_  
 VAT identification number: \_\_\_\_\_ E-mail: \_\_\_\_\_

|      |      |           |
|------|------|-----------|
| Date | Name | Signature |
|------|------|-----------|

In case of interest in single issue (+25 %), please contact the responsible analyst.

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#### Benefits of an Interconnection Subscription:

- 25% price advantage compared to single issue. (annual receipt of an IC study or IC study package)
- 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 on request: alternating countries, product change, etc., if possible