

Dry Construction Systems
in Europe 2018
IC Market Tracking

Benefits	Page 03
Market Structure	Page 04
Methodology	Page 07
Content of the Report	Page 10
Sample Charts	Page 12
Prices	Page 17
References	Page 21
Contact	Page 22
Factsheet	Page 23

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 and Segments
 - Distribution Channels
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.



IC Market Tracking 2018 Dry Construction Systems in Europe

- Benelux
- France
- Germany
- Italy
- Russia
- UK



Material	Product Group	Customer Segment	Business Segment
Drywall	Plasterboards	Residential	New Construction
Wood	Moist Conditions	Commercial	Renovation
Other	Fireproof	Healthcare & Hospitality	
		Industrial & Offices	
		Other	

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

Product Group

Turnover is stated in 1.000 Euro. Values are always Net-Turnovers (No List-Prices), discounts included

Plasterboards

Panels used for common installations.

Moist Conditions

Panels made of special composite materials apt at withstanding water and wet environments.

Fireproof

Panels made of fireproof material to withstand fire and high heat.

Material

Drywall

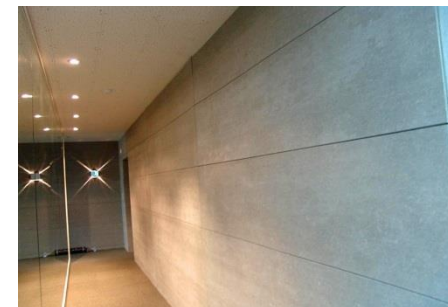
Panel made of gypsum plasterboard

Wood

Panels made of wood and wood composite materials

Others

Other types of materials



Definition and Demarcation

Customer Segment

Residential

Internal wall and suspended ceilings systems installed in residential buildings

Commercial

Internal wall and suspended ceilings systems installed in department stores, malls, shopping centers etc.

Healthcare & Hospitality

Internal wall and suspended ceilings systems applied in hospitals, clinics and other medical spaces

Industrial & Offices

Internal wall and suspended ceilings systems applied in offices, production halls, warehouses, workshops and other industrial constructions.

Other

Internal wall and suspended ceilings applied for other non-residential buildings

Business Segment

New Construction

Internal wall and suspended ceilings systems are installed in new constructed buildings.

Renovation

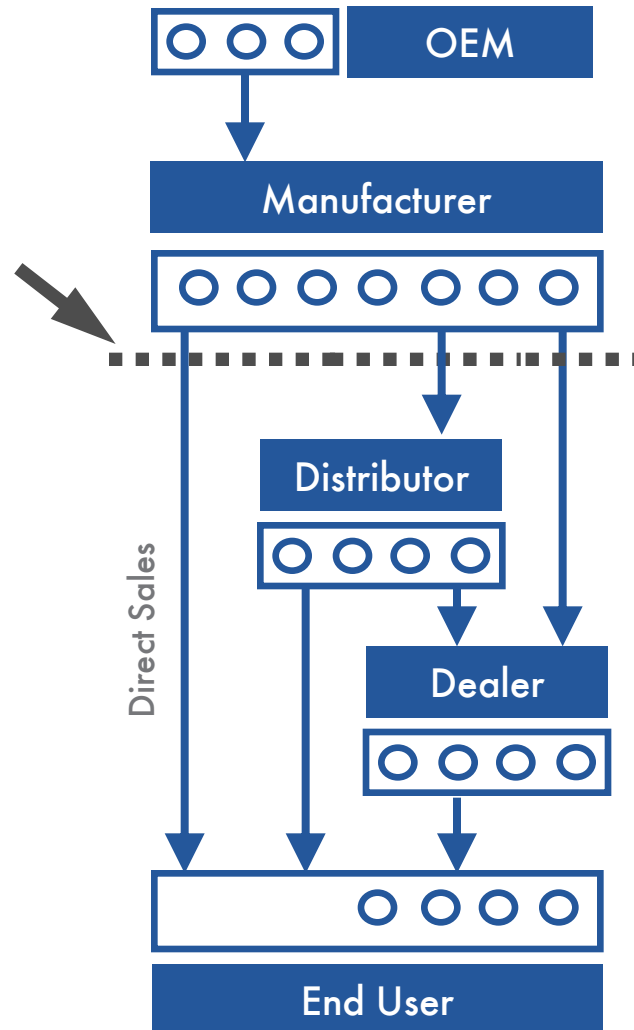
Renovation of the buildings and modernisation of the wall and ceiling structure.



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.



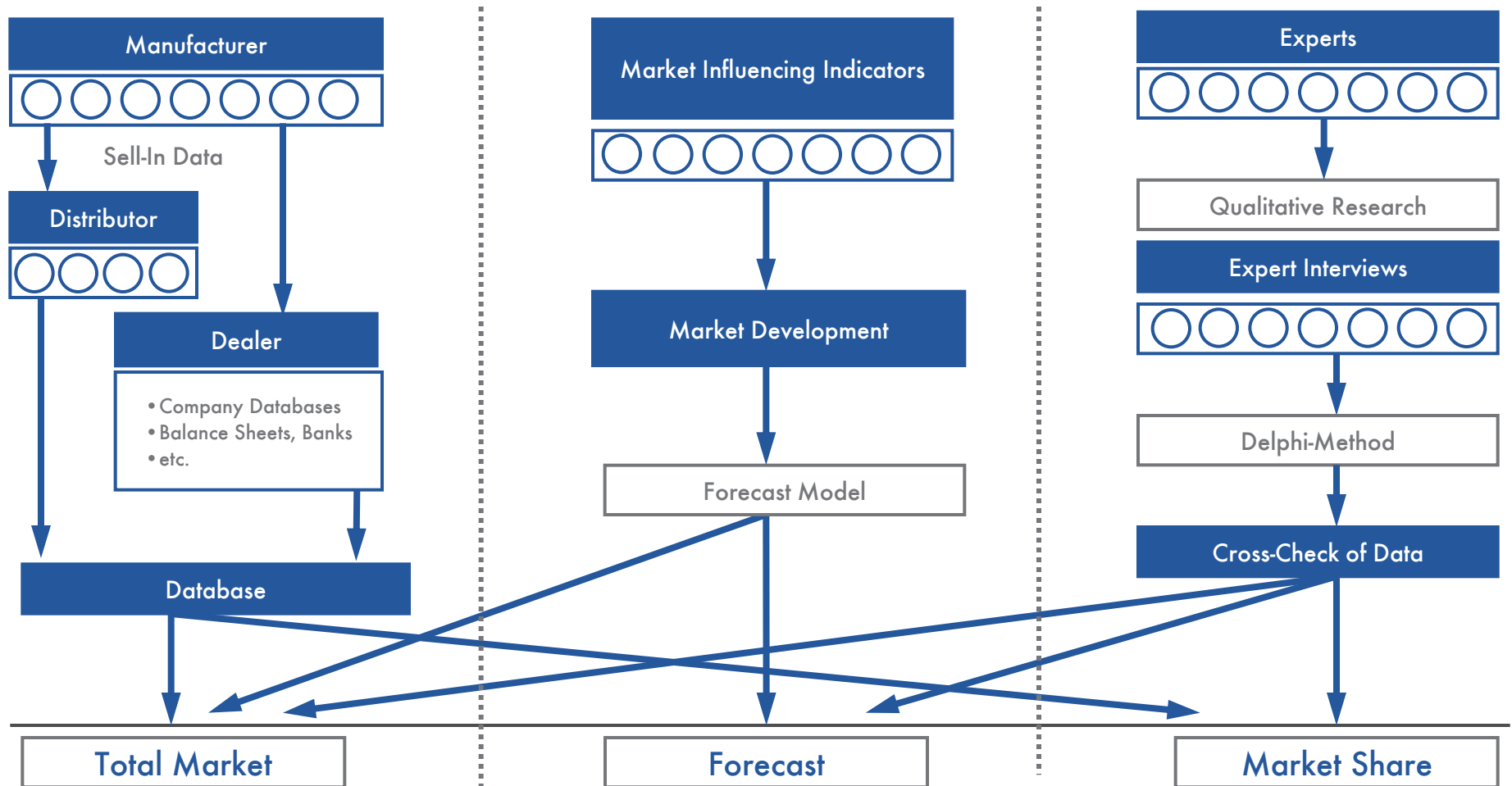
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

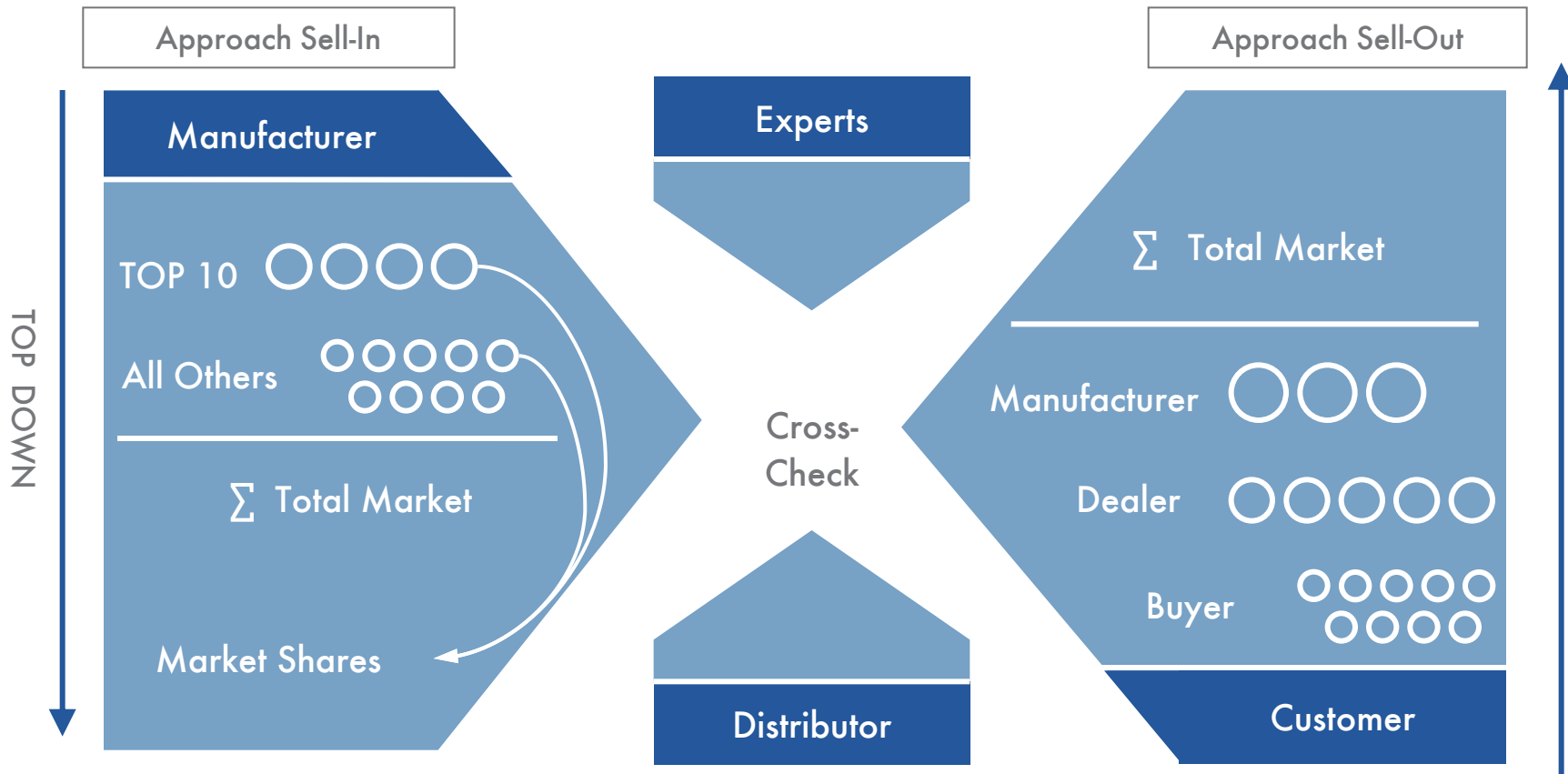
How Do We Conduct Our Research?

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.

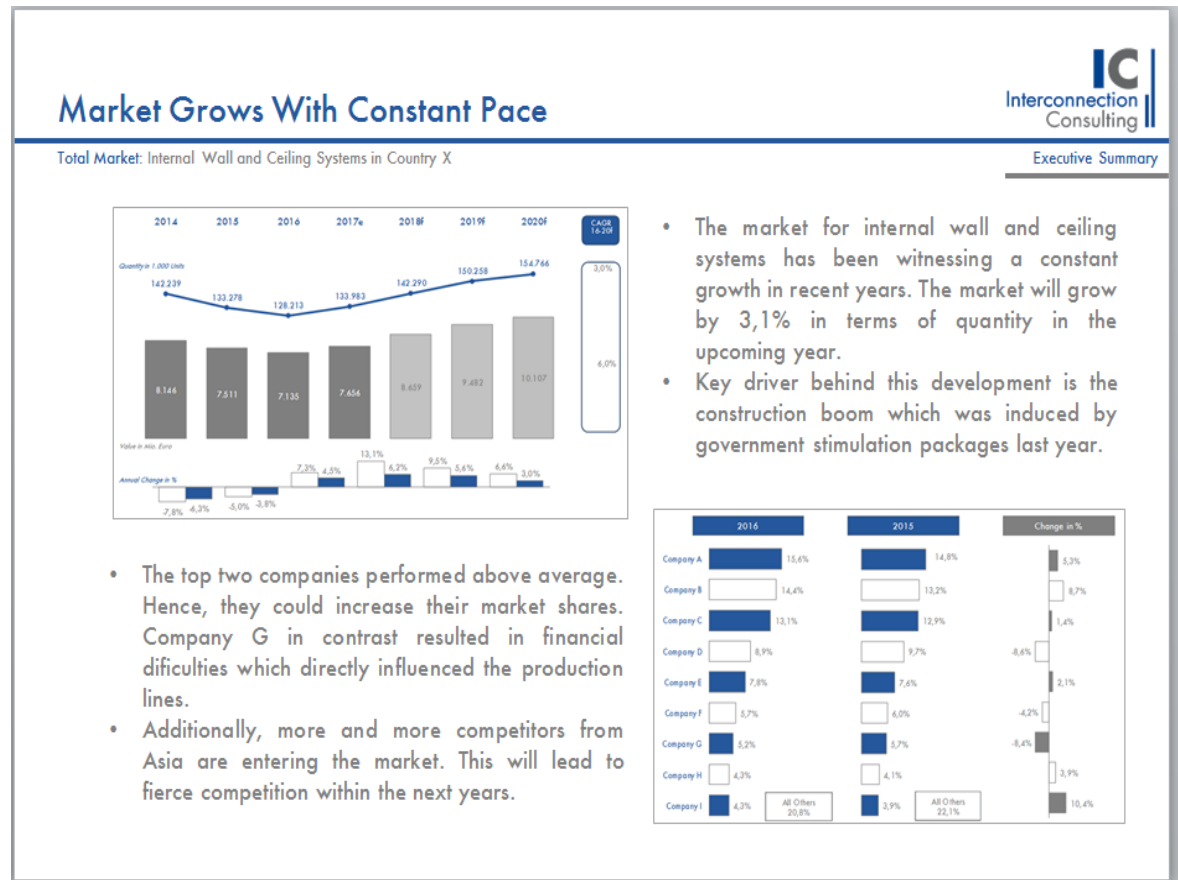
Content of the Report *

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

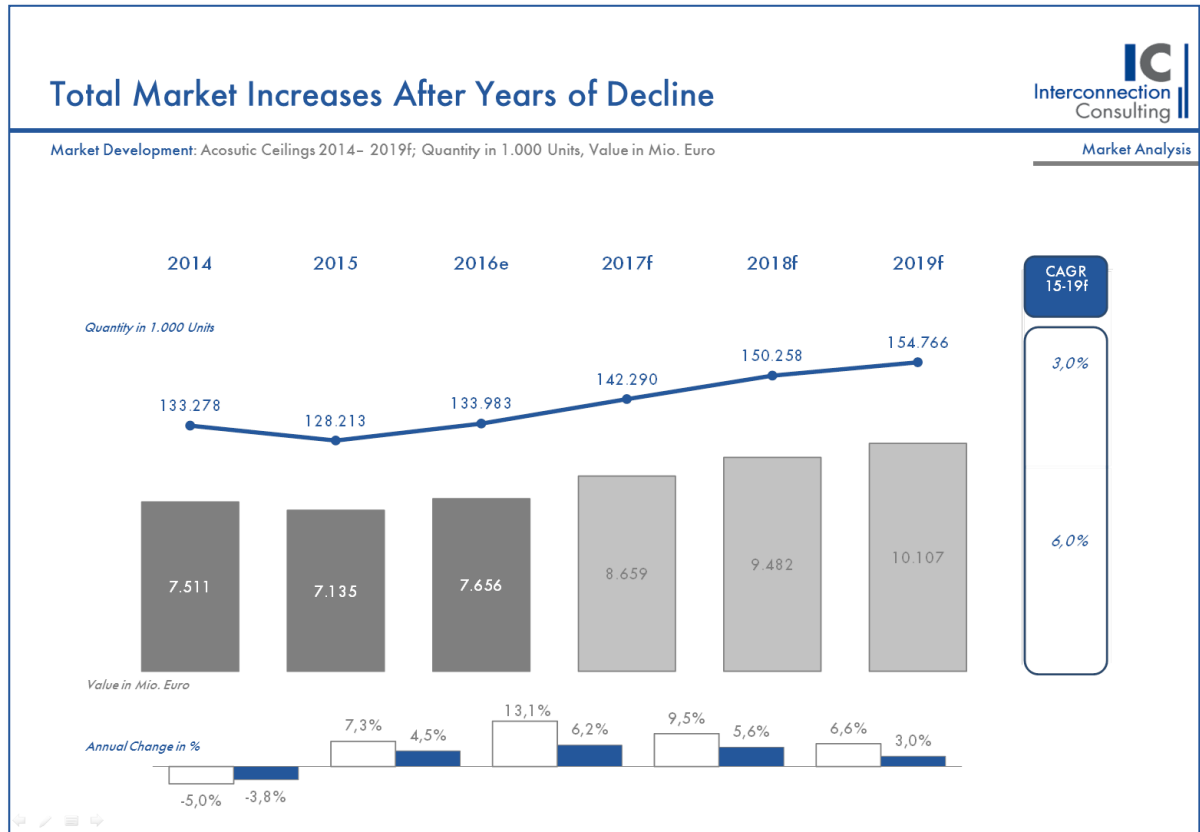
Executive Summary at the Beginning of the Report

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

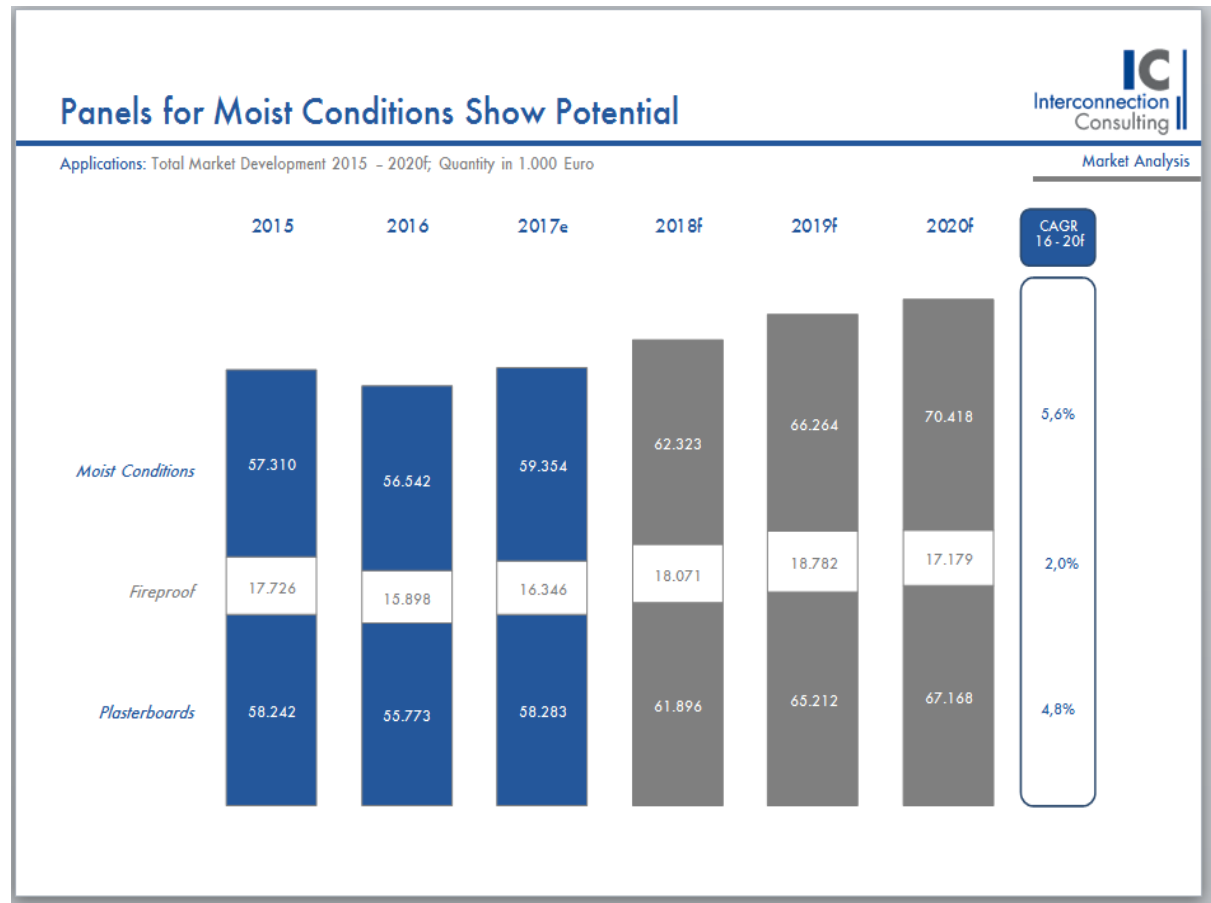


Total Market Development and Forecast

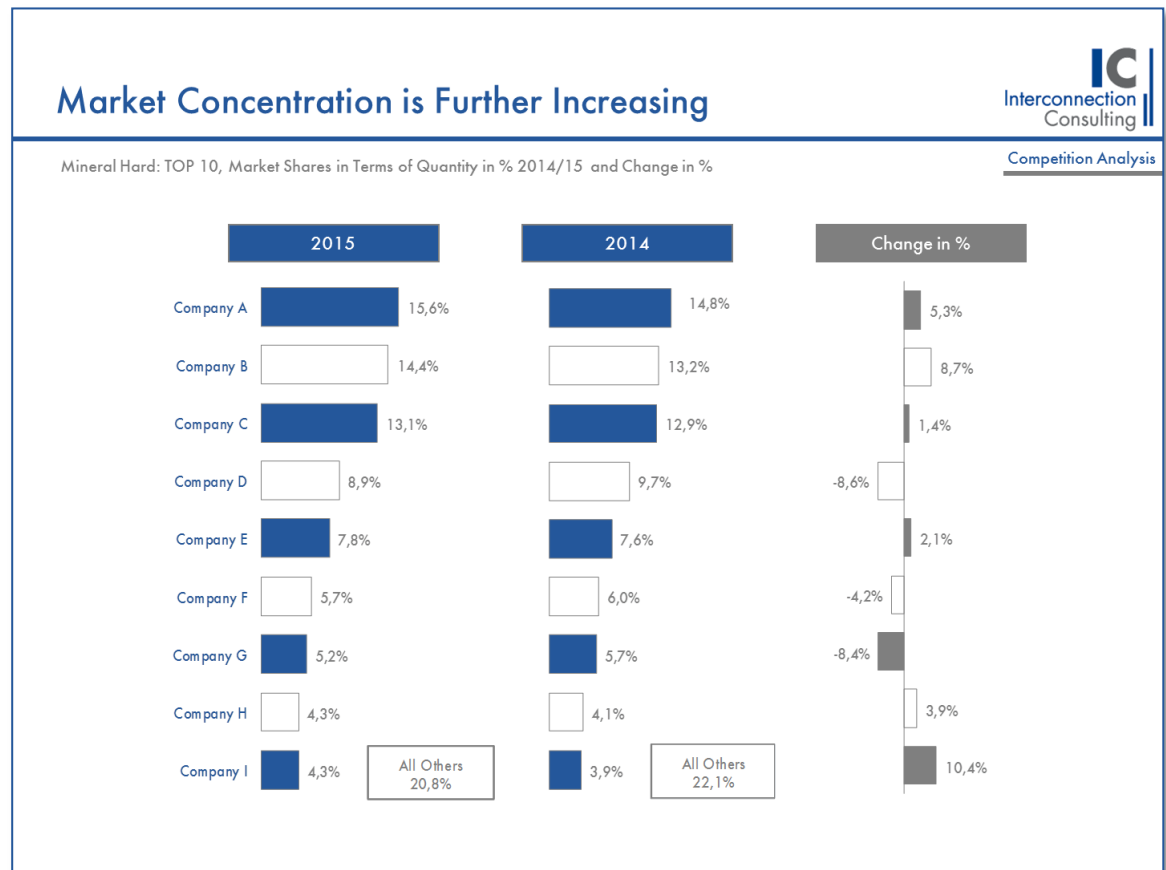
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- This chart shows *dummy figures*.



- Overview of Product Groups, Materials, Application Areas, Business Segments 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 modelling.
- 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

IC Market Tracking® 2018 Dry Construction Systems in Europe

Europe Top 6	Subscription *	Single Issue **	Scale of Discounts from a buying price of	
Single Country	IC SUBSCRIPTION 20% PRICE ADVANTAGE	€ 13.299,-	€ 5.000	-10%
		€ 2.999,-	€ 7.500	-20%
			€ 12.500	-25%
			€ 17.000	-35%
Available countries	Benelux	France	Germany	Italy
			Russia	UK

* Annual price for at least two orders of the study (order year and the following year. The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

** Offer Old + New: This offer entails the purchase of the 2018 issue plus the 2017 issue at a reduced price. The same goes for the subscription.

Price includes an interactive PDF in electronic form. All prices shown excludes 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 construction 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

Getreidemarkt 1, A-1060 Wien

Vito Graziano – Market Analyst

Tel: +43 1 5854623 -39

Fax: +43 1 5854623 -30

graziano@interconnectionconsulting.com

Dr. Frederik Lehner – Managing Director

Tel: +43 1 5854623 -11

Fax: +43 1 5854623 -30

lehner@interconnectionconsulting.com

Interconnection Consulting
Vienna • Bratislava • Lviv • Buenos Aires

www.interconnectionconsulting.com



we show you the way

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 500
- Optional: Hard Cover

Price

- per country: 2.999€
- all regions: 13.299 €
- Hard Cover: 150 €

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

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, business segments, customer segments, distribution channels and opening types.

Competitive 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

Benelux, France, Germany, Italy, Russia, UK.

Product Groups

Plasterboards, Moist Conditions, Fireproof

Material

Drywall, Wood, Other

Customer Segment

Residential, Industrial & Offices, Health Care & Hospitality, Commercial Buildings, Other

Business Segment

New Construction
Renovation

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.