



we show you the way

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IC Market Tracking® Flat Roof Sealings 2015

- Germany
- France
- Benelux
- Austria

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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
 - Regions
 - Material Groups
 - Customer Segment
 - Business Segment
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.



Flat Roof Sealings 2015



Material Group	Customer Segment	Business Segment	Distribution
PVC	Residential	New Construction	Direct
Bitumen	Non-Residential	Renovation	Indirect

For each segment we show the **total market development from 2010-2018** (2016-2018 as a Forecast) and the **market shares** of the top players for the years 2014 and 2015e.

Definitions

Material Group

PVC

Turnover is always displayed in millions of euros. The values are always expressed as net sales (no list prices) and discounts are included.

Synthetic roofing membranes can be classified as thermoplastic and elastomeric membranes according to the initial materials used, that is, made of synthetic rubber.

Bitumen

Bitumen roofing membranes are available as either bitumen membranes (reinforcements with bitumen coatings on both sides) or polymer bitumen membranes (elastomer and plastomer bitumen membranes).

Customer Segment

Residential

Traditional residential housing, e.g. one, two or multiple family homes

Non-Residential

Non-residential buildings, such as buildings used for educational, industrial, healthcare or commercial purposes or factories.

Business Segment

New Construction

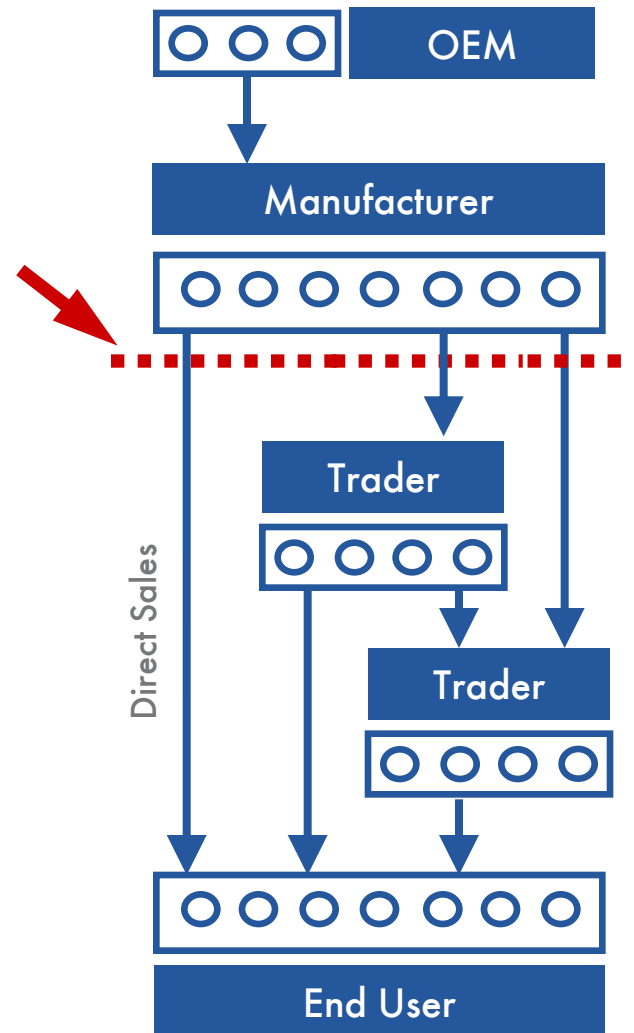
Flat roof sealing on newly constructed buildings.

Renovation

Renovation of buildings, which includes sealing the roof.

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.

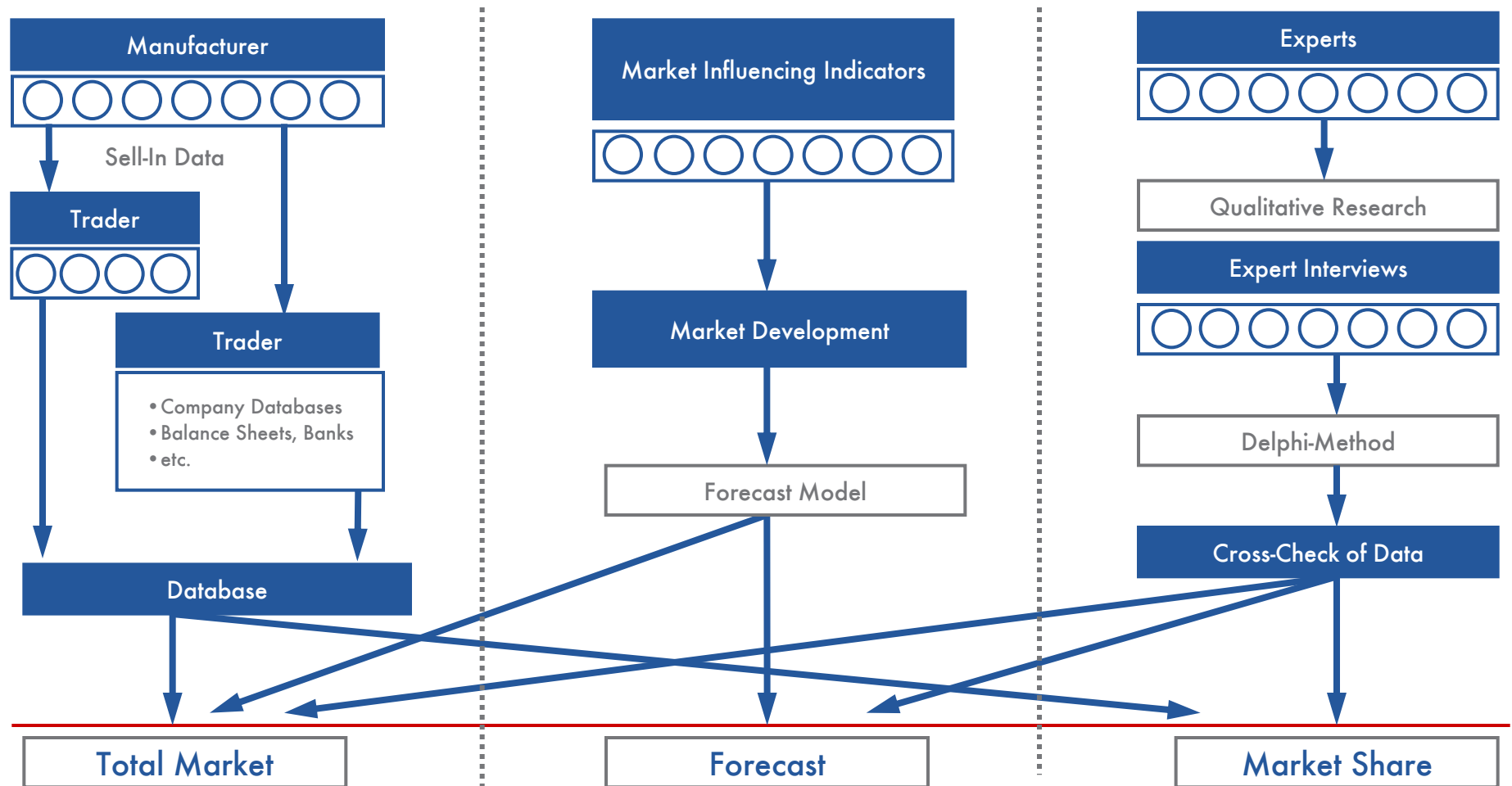


The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised traders act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

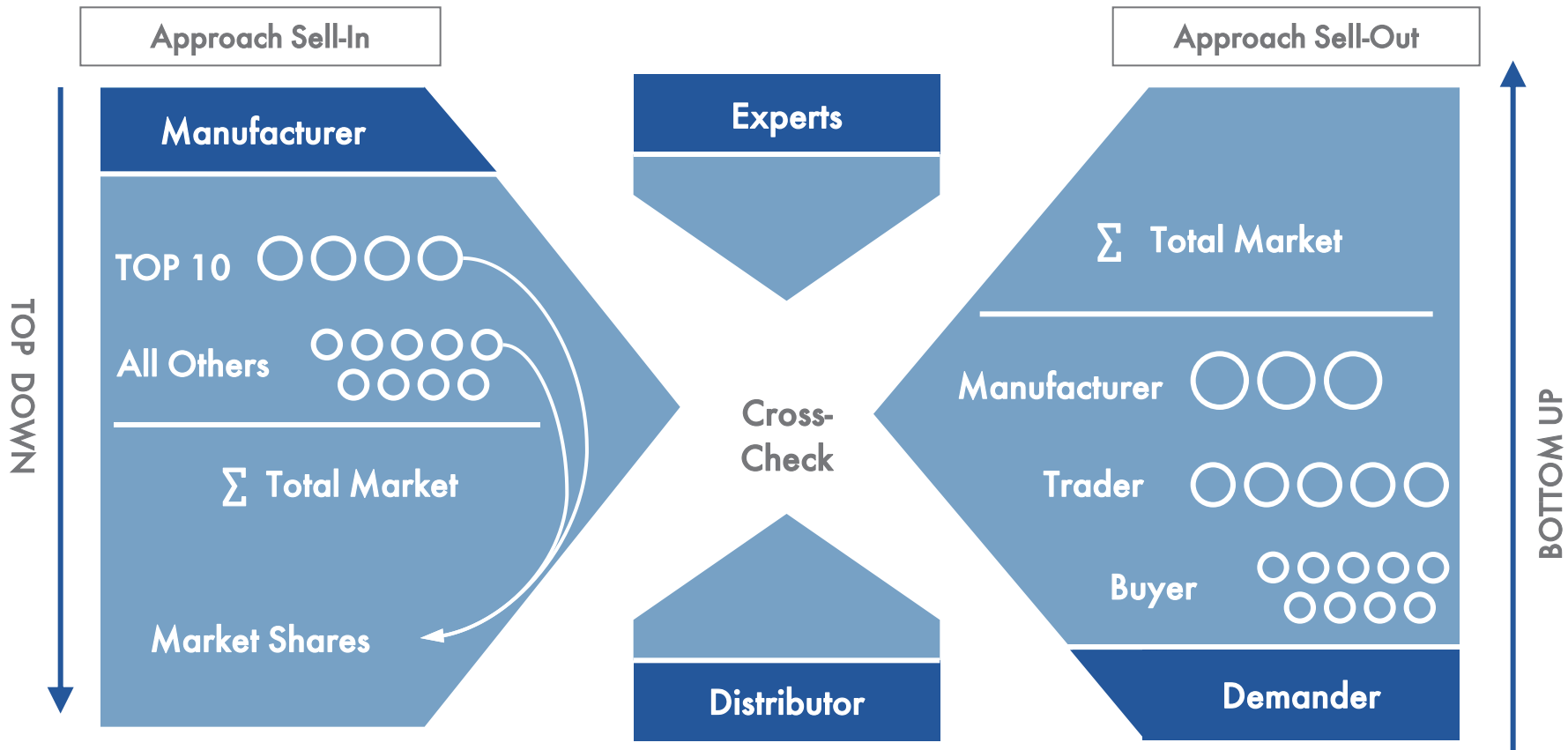
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology



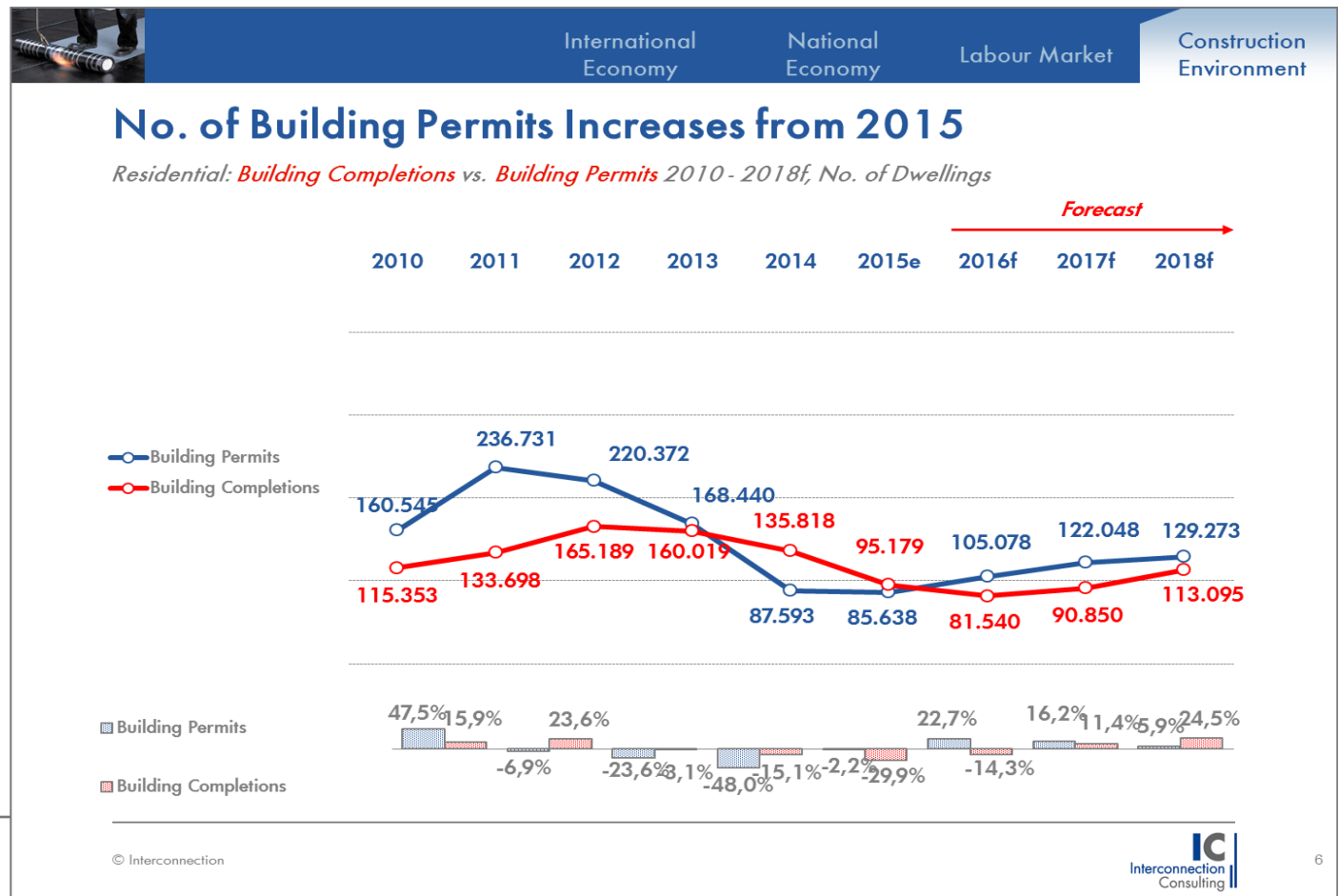
Contents of the IC Market Tracking®

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 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.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Our Pivot-Table helps you to undertake further in-depth analysis for your individual needs for all companies represented in the study.

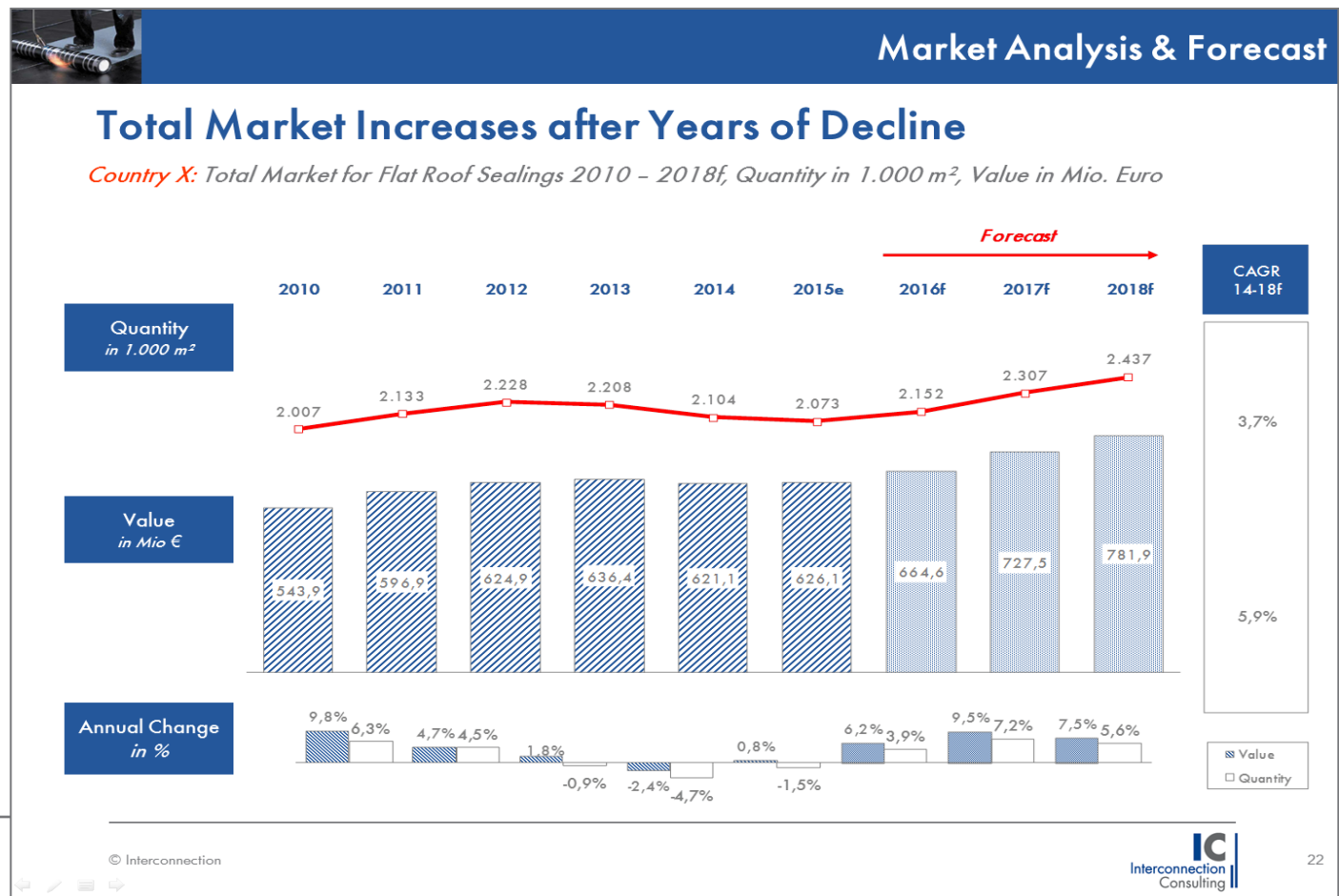
Market Influencing Factors

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



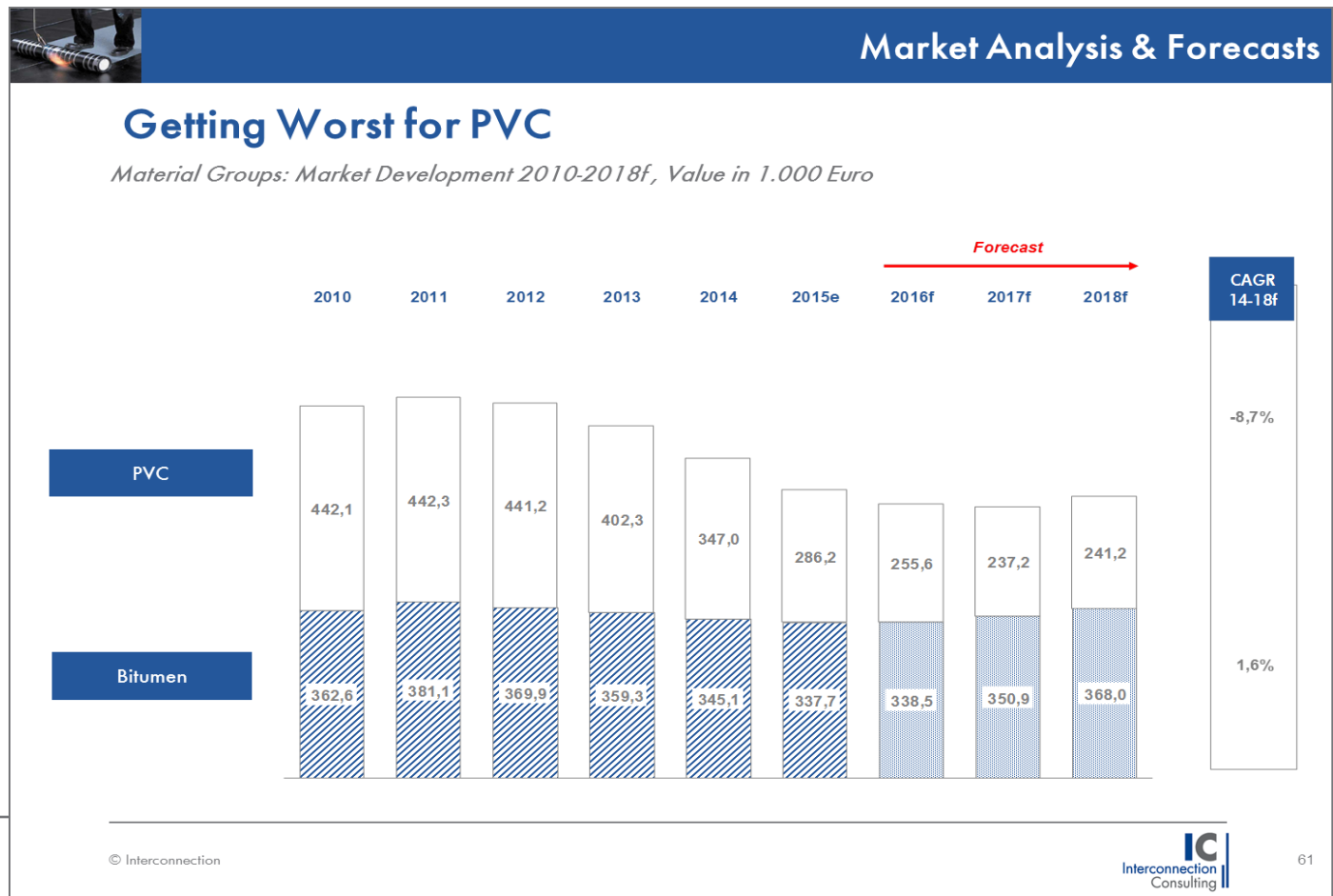
Total Market Development and Forecast

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



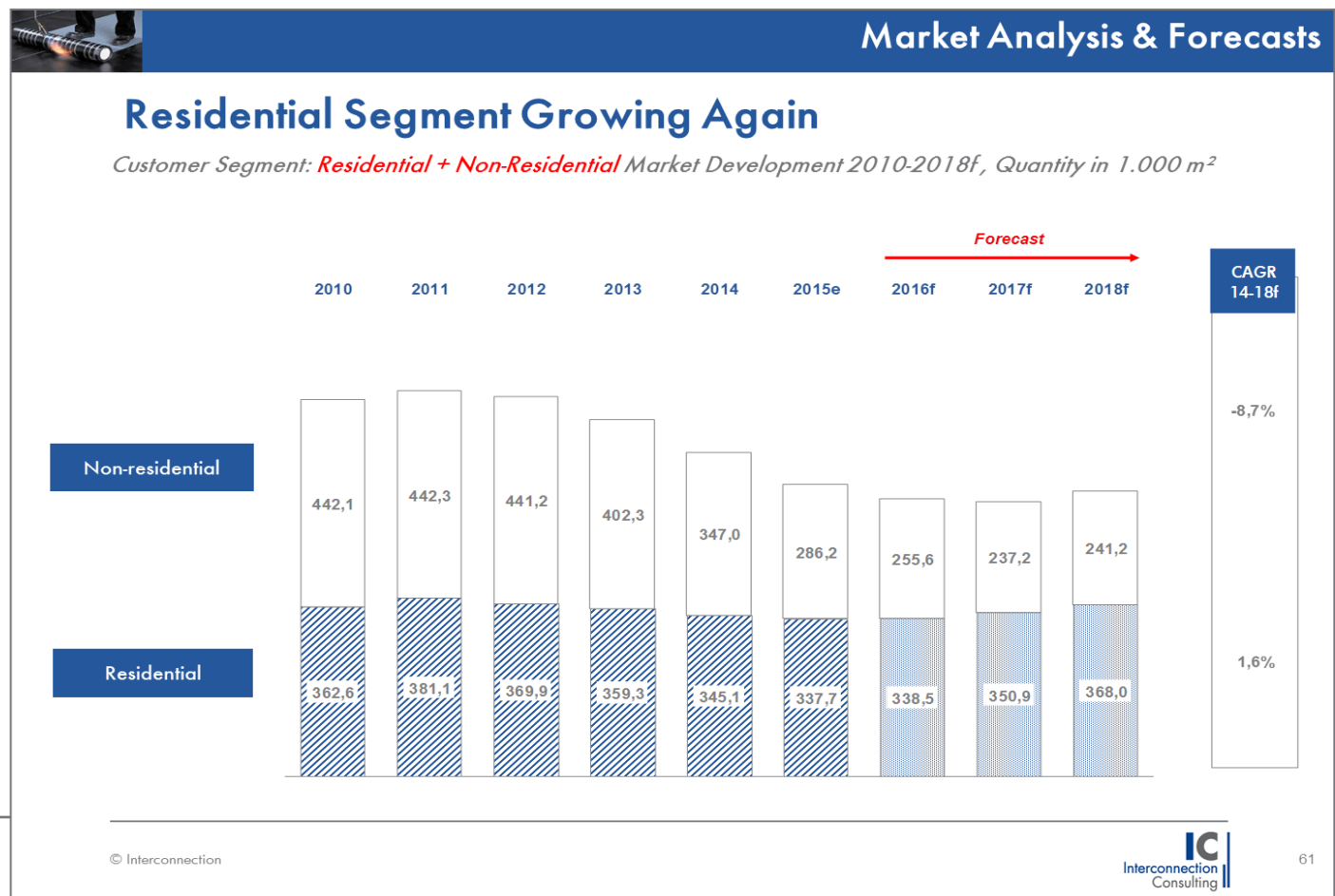
Product Group Development

- Overview of the total market until the current year and forecast for the upcoming three years by product groups.
- This chart shows sample figures



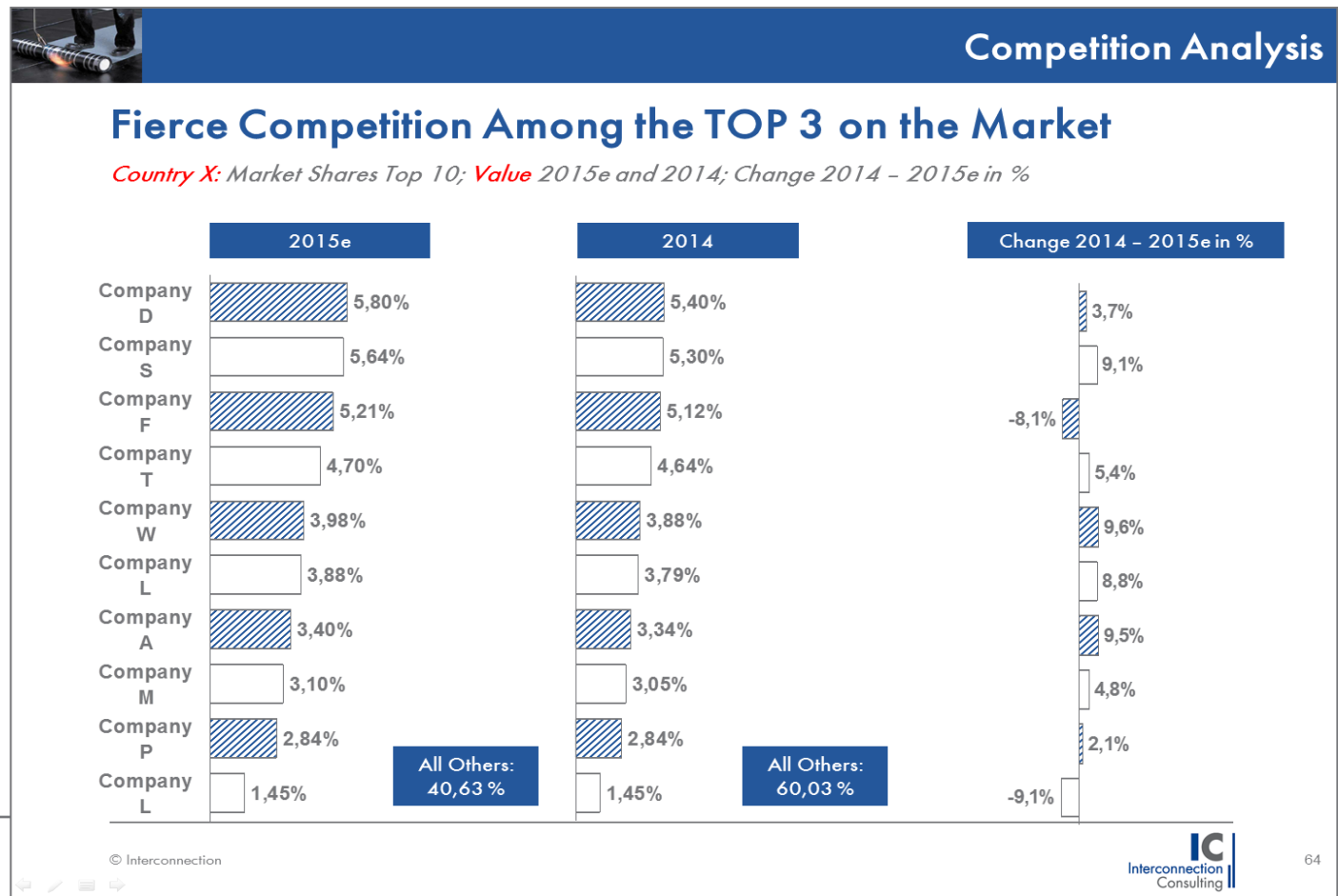
Product Group Development

- Overview of the total market until the current year and forecast for the upcoming three years by product groups.
- This chart shows sample figures



Competition Analysis and Market Shares

- *Market Shares of the Top 10 market Leaders for every Market Segment.*
- *This chart shows sample figures*



Pivot Table

- Additionally to the visualised report a Pivot Table will be included
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

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® Flat Roof Sealings 2015

	Subscription *	Single Issue	Scale of Discounts from a buying price of	
All 4 Countries **	€ 10.500,-	€ 11.850,-	€ 7.000,-	-15%
One Country	€ 3.500,-	€ 3.950,-	€ 14.000,-	-25%
Available countries	Germany	Austria	Benelux	France

* 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.

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

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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 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 construction industry.
- Next to market data we offer for the Cleaning Machines industry 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 actions = in the development of marketing strategies.



„IC is a constant tutor in the evaluation of markets and offers a helpful decision basis.“

Mr. Bernd Blümmers
Directeur General, Saint-Gobain Solar Systems, Central Europe, Aachen

Few of our past customers of Interconnection Consulting reports:



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General Information

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 80p. /country
- Optional: Hard Cover

Price

- Single Issue: 3.950 €
- Subscription: 3.500 €
- 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

German, English 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, 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:

Germany, Austria, Benelux, France

Material Groups

PVC, Bitumen

Customer Segment

Residential, Non-Residential

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.

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Yes, we would like to order the following market reports IC Market Tracking® Flat Roof Sealings 2015

(Please print out the order form and mark your desired countries for the report)

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<input type="checkbox"/> France	€ 3,950	€ 3,500
<input type="checkbox"/> Benelux	€ 3,950	€ 3,500
<input type="checkbox"/> All 4 Countries**	€ 11,850	€ 10,500

** Price with regards of the scale of discounts

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- Translation in another language (price on request)

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