



IC Market Tracking® Flat Roof & Construction Sealings 2022

- Austria
- Belgium
- France
- Germany
- Italy
- Nordics
- Poland
- Romania
- Spain
- Switzerland

Company Profiles



Interactive Dashboards



Market Drivers



automatically updated



defining growth potential since 1998

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 2018 – 2021 for the total market development as well as
 - Material Groups
 - Application Types
 - Customer Segments
 - Business Segments
 - Distribution Channels
- Forecasts from 2022 – 2025 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 2021/22
 - 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

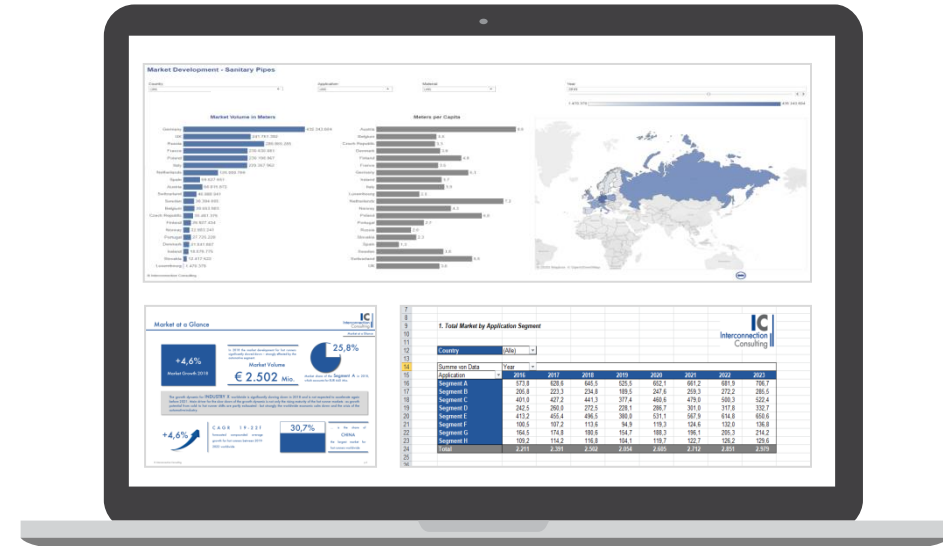
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of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

EXECUTIVE REPORTS

- Executive 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 already integrated within Tableau

RAW DATA -TABLES

- Downloadable tables from MIS as xls. cvs. jpg. or other formats for your own integration
 - Graphs
 - Raw Data



Market Intelligence Tool and Reports



Online Dashboards

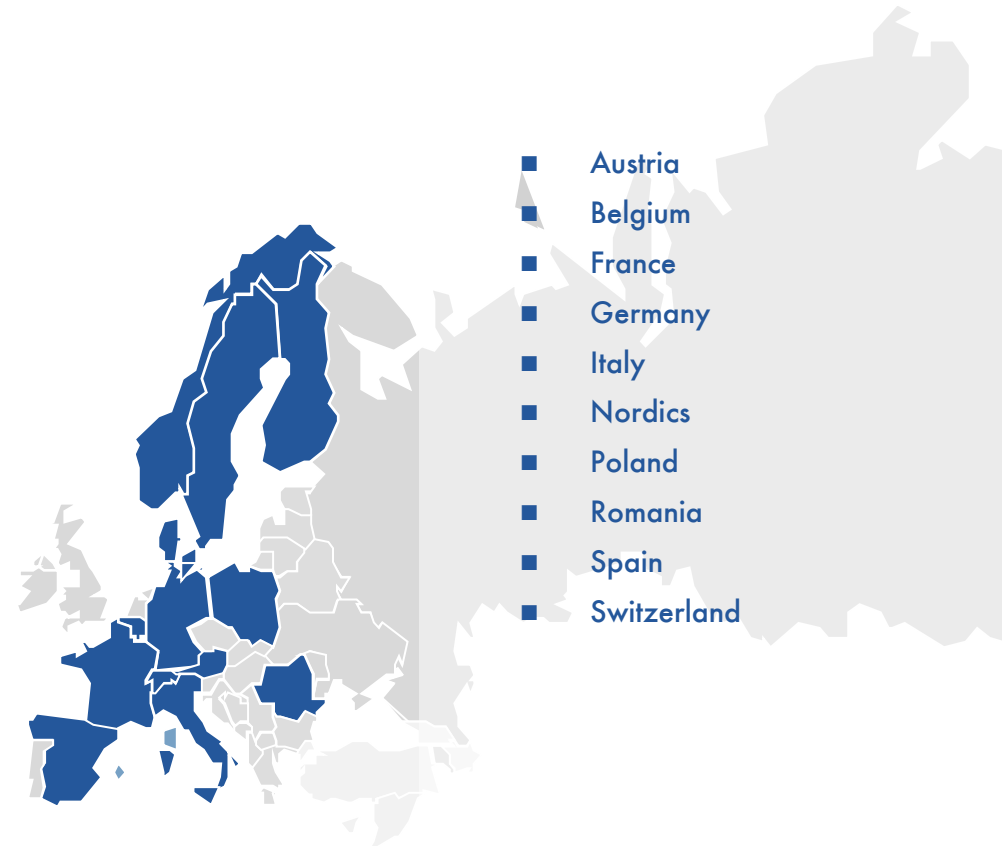
Executive Reports

Market Report Structure



Material Groups	Customer Segments
Bitumen	Residential
Plastic	Non Residential
Elastomers (Synthetic rubber)	
Business Segments	Distribution Channels
New Construction	Direct
Renovation	Indirect
Application Types	
Flat Roofs	Other Construction
Building Construction	Others

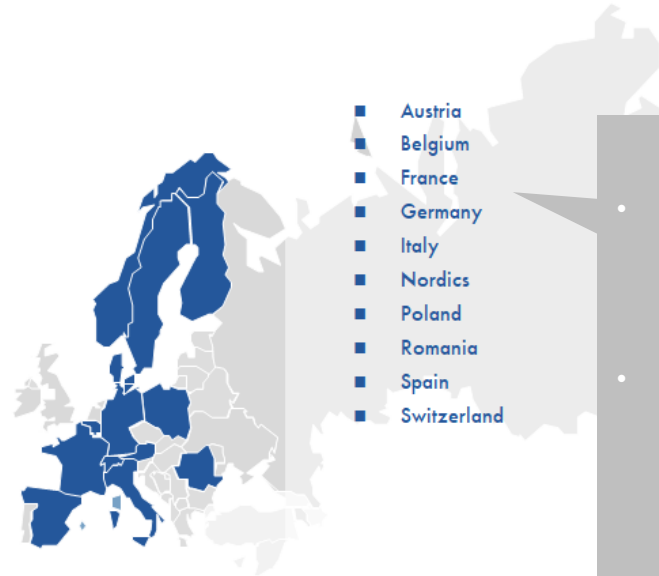
Available Countries



Market Report Structure

Material Groups	Customer Segments
Bitumen	Residential
Plastic	Non Residential
Elastomers (Synthetic rubber)	
Business Segments	Distribution Channels
New Construction	Direct
Renovation	Indirect
Application Types	
Flat Roofs	Other Construction
Building Construction	Others

Available Countries



- Market data is available for each country separately as well as aggregated for the country package purchased.
- Area (m²) is measured for every layer of product, not surface applied. 1m² of double-layered Bitumen shall be registered as 2m²
- Each country report includes data for material groups, business segments, customer segments, application types and distribution channels separately as well as aggregated for the total market of waterproofing membranes in terms of value (only material groups) and quantity (all segments).

Material Group

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

Bitumen

With carrier insert and outer layer made of polymer bitumen, modified with thermoplastic elastomers (PYE) or polymer bitumen, modified with thermoplastics (PYP)

Plastic

Made of Polyolefin alloys (FPO / TPO), Polyvinyl chloride (PVC-P), Ethylene copolymeris bitumen (ECB), Polyisobutylene (PIB), Ethylene vinyl acetate copolymer (VAE / EVA) or chlorinated polyethylene (PEC).

Elastomers (Synthetic rubber)

Owing to the base material of rubber, they are often referred to as elastomers. Since then, different materials have been used as roofing membranes: isobutylene-isoprene rubber (IIR), ethylene-propylene-diene monomers (EPDM), nitrile rubber (NBR), chlorosulfonyl polyethylene rubber (CSM) and butyl rubber (IIR). They are defined according to the standard DIN 7864.

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

Sealings on newly constructed buildings.

Renovation

Renovation of buildings and other areas which includes sealings.

Application Types

Flat Roofs

Especially flat roofs, not considering humid isolation.

Building Construction

Including all but roofs – walls, cellars, underground seals, balconies..etc

Other Construction

Tunnels, Bridges, Parking Lots, Roads, Rails...etc

Others

Pools and other special application, considering pre-defined product groups

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

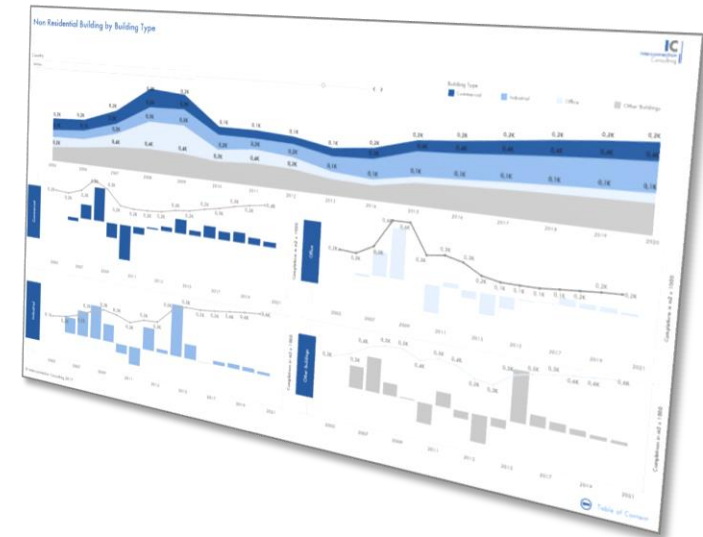
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

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

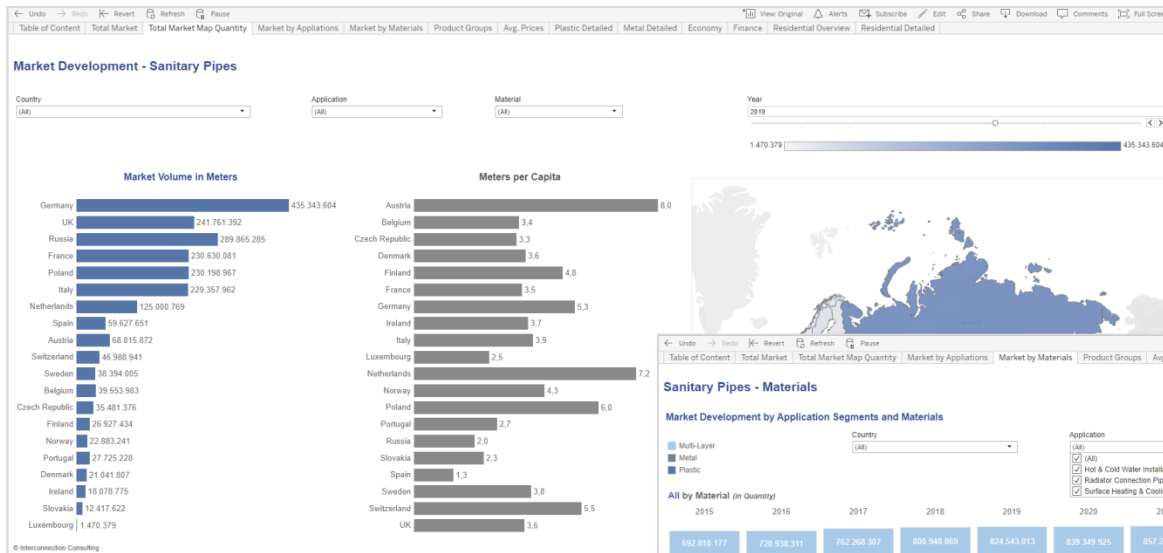


Usability of the Market Intelligence Tool

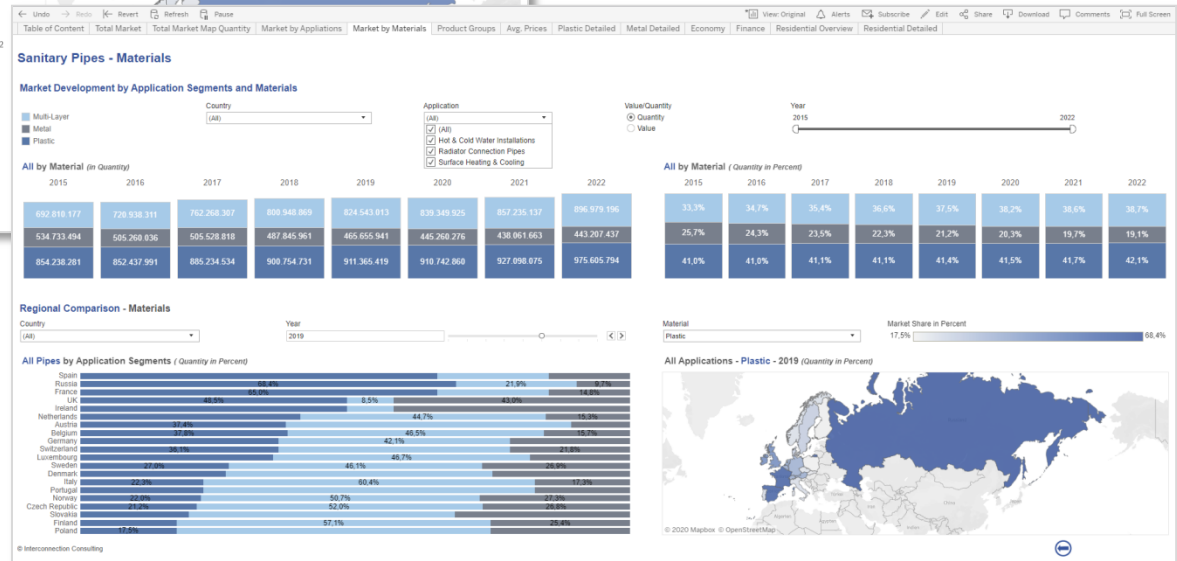
Let's Put it in a Video...



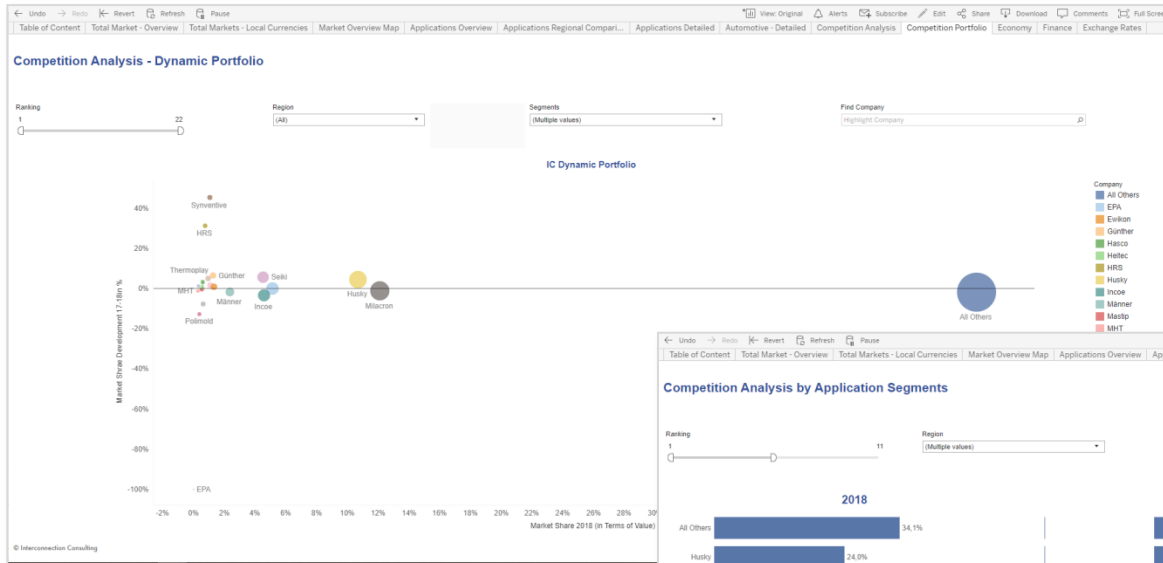
Sample Cockpits for Market Analysis Data



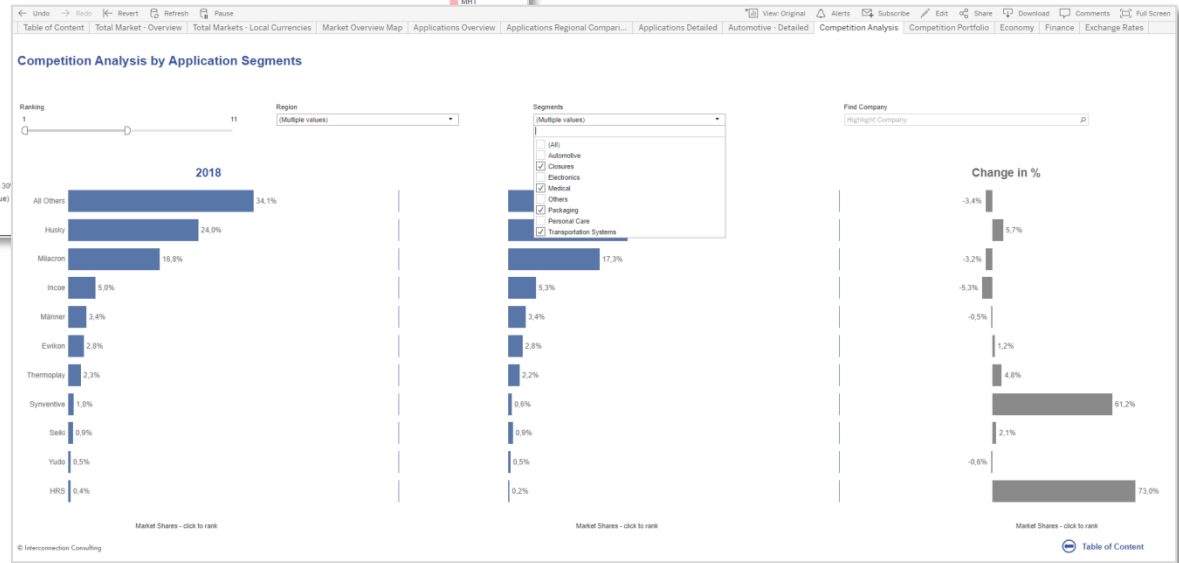
This chart contains fictive data



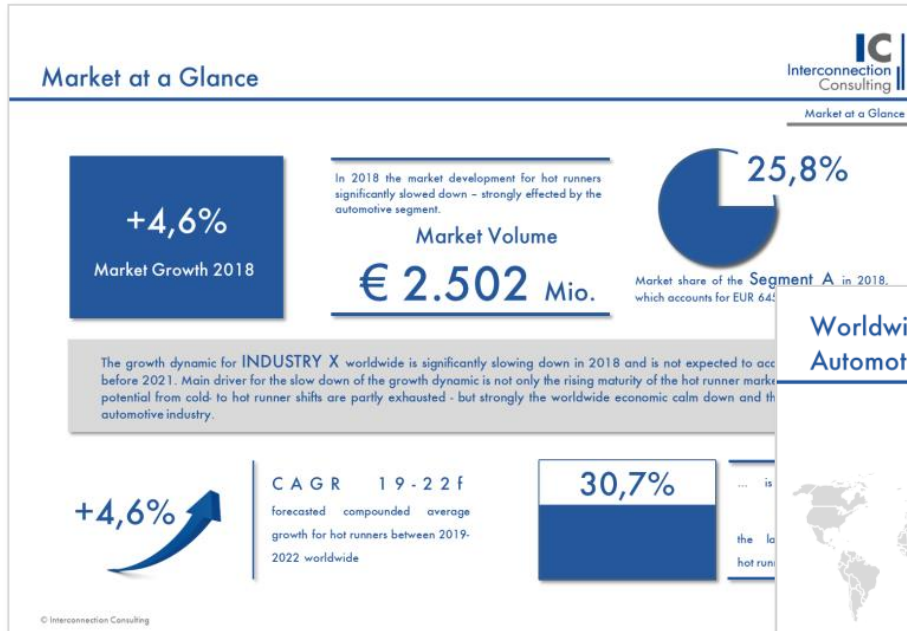
Sample Cockpits for Competition Data



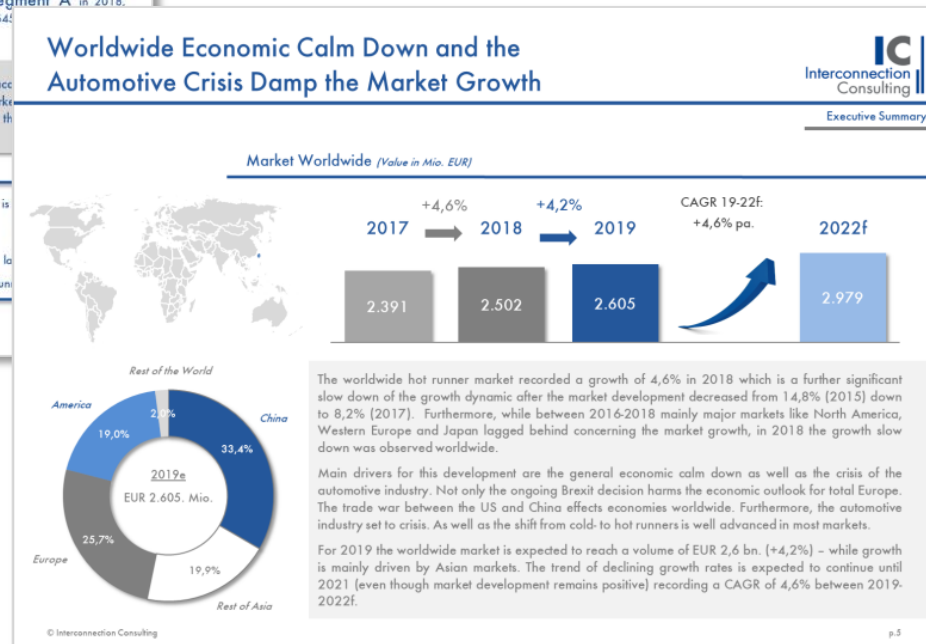
This chart contains fictive data



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® Flat Roof & Construction Sealings 2022

Prices & Conditions

	Subscription *	Available Countries
2 Countries of Your Choice	€ 5.950,-	<ul style="list-style-type: none"> • Austria • Belgium • France • Germany • Italy • Nordics • Poland • Romania • Spain • Switzerland
All Countries	€ 19.950,-	



- **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 automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.
- 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.
- In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit (Software for Online Dashboards) is included as well as for any subscription order exceeding 2 countries or regions. For all other options, license costs for Tableau cockpits are € 500,- per license per year.

„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

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Our Market-Intelligence Tools



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

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