

IC Market Tracking

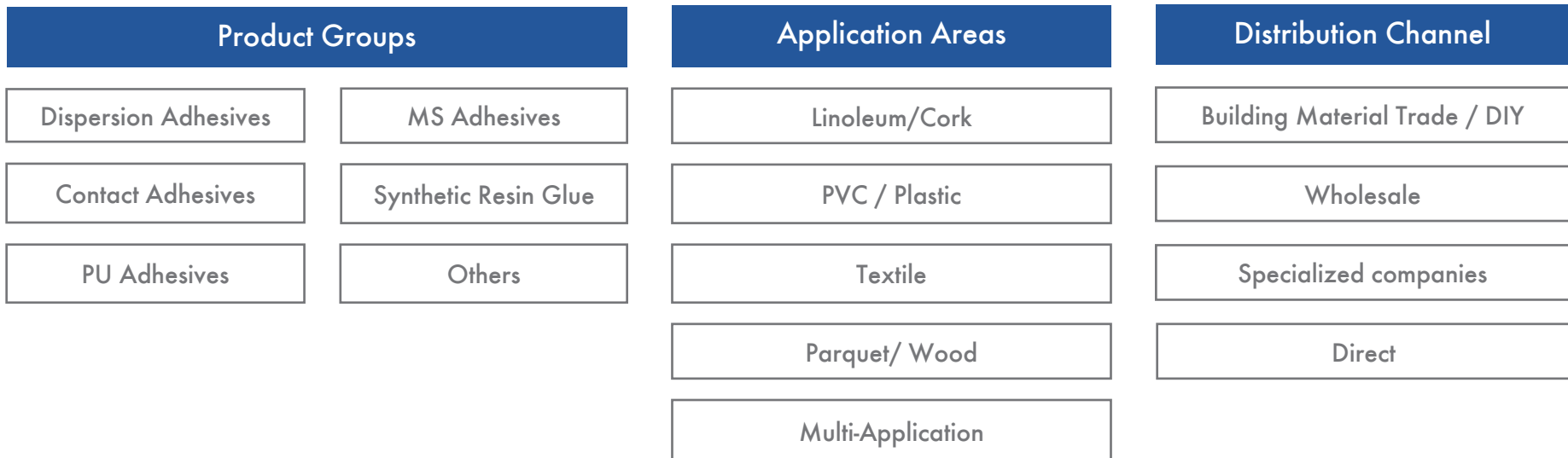
Floor Covering Adhesives In Europe 2018

- Germany
- Austria
- Switzerland
- France
- Italy
- Benelux

Your Benefits at a Glance

- ✓ Interconnection Consulting is offering various flooring studies, updated periodically
- ✓ Possibility of Ad Hoc extensions, research and information available
- ✓ A detailed **representation of the key markets by country and forecasting until 2021 or further** based off of our econometric forecast model.
- ✓ **A competition analysis** containing detailed **market shares** for selected regions in terms of:
 - The total market
 - Product groups
 - Application Areas
 - Distribution Channels
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.
- ✓ Company profiles for regions, where competition analysis is not available





For each segment the total market and market shares and/or profiles of the top players for the last two years and forecasts for the next three years are available in the study.

Product Groups

Turnover is stated in 1.000 Euro. Values are always net revenues (no list prices), including rabats.

Dispersion adhesive

Dispersion adhesives are water-based adhesive systems which form bonds through physical hardening when the water evaporates. The bonding effect is provided by a polymer component which forms a film when the aqueous component evaporates.

Contact Adhesives

Contact adhesives, high-strength contact adhesives. Solvent-based adhesives and dispersion adhesives, which are processed in the contact bonding method. Solvent-based contact adhesives consist of dissolved organic binding material, highly volatile solvents (up to 80%), inorganic fillers and additives. Dispersion contact adhesives mainly consists of dispersions of natural and synthetic rubbers with organic fillers and additives.

PU Adhesives

Polyurethane adhesives are those glues that are made of urethane polymers with chemical based of isocyanate group, polyurethane adhesives are also known as elastic adhesives, due they have an extraordinary elasticity.

Synthetic resin glue

Solvent-based adhesives Solvent based adhesives are a mixture of ingredients (typically polymers) dissolved in a solvent (heptane, toluene, n-butyl acetate, acetone, methyl ethyl ketone, naphtha, mineral spirits and methylene chloride).

MS Adhesive

Modified silanes are one component adhesives which react and cure under the action of moisture, during its curing process by polycondensation this type of adhesives emit methanol and once cured acquire elastic properties and typical strength of an elastomeric material. Depending on the chemical backbone or resin composition of the adhesive, on the market exist two types of modified silanes: polyether modified silanes, polyurethane modified silanes

Others

Universal fixation, multi-purpose solutions; dry adhesives for installing resilient and textile floor coverings.

Not included are: Ground treatment substances

Application Areas

Turnover is stated in 1.000 Euro. Values are always net revenues (no list prices), including rabats.

Linoleum/cork

Adhesives for linoleum (a natural product made of linseed oil, wood, limestone, cork, and resins) and cork (an organic product made of thinly sliced cork from trees, cork; "green" or eco-friendly flooring product).

PVC / Plastic

Adhesive suitable for such types of resilient flooring (artificial composite floors) as plastic, PVC, Vinyl.

Textile

Adhesive for "carpets", mainly for needle, carpet tiles, and tufted floor covers.

Parquet/ Wood

Adhesive for massive or multi-layer parquet in various types of wood, engineered hardwood

Multi-Application

Adhesive suitable for multiple flooring.

Distribution Channels

Building Material Trade / DIY

Large hardware stores that sells directly to the consumer and craftsmen, for example: Hornbach, Obi.

Wholesale

Wholesalers purchasing merchandise from manufacturers or other suppliers and these continue to retailers, industrial users or other institutions.

Specialized companies

Builders or construction companies, which directly install the floor for their clients.

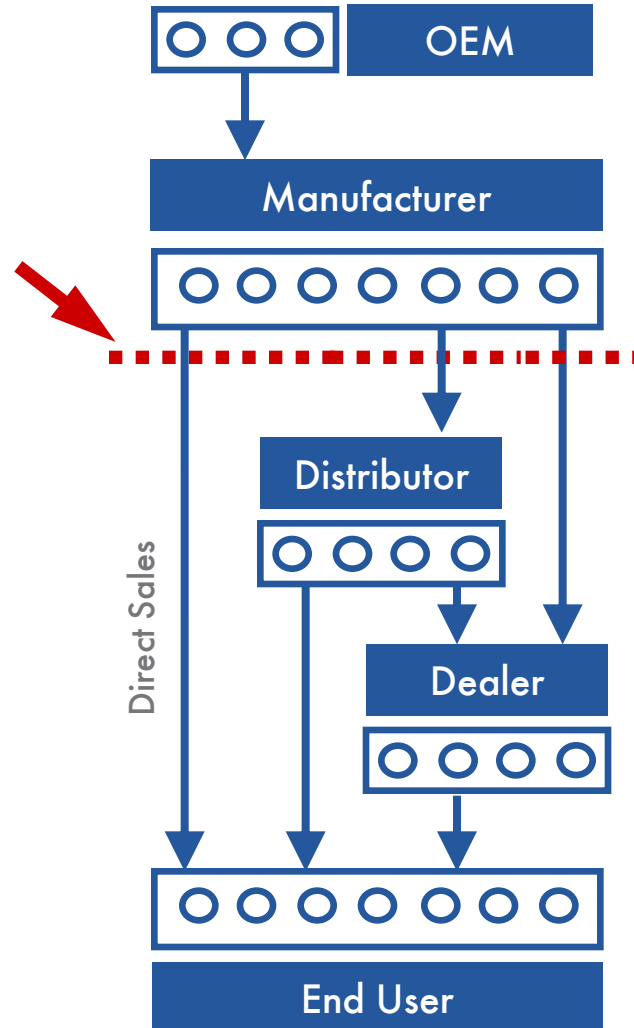
Direct

Direct distribution comprises from Online Sales via webpage, purchases at company stores/sites shops.

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.



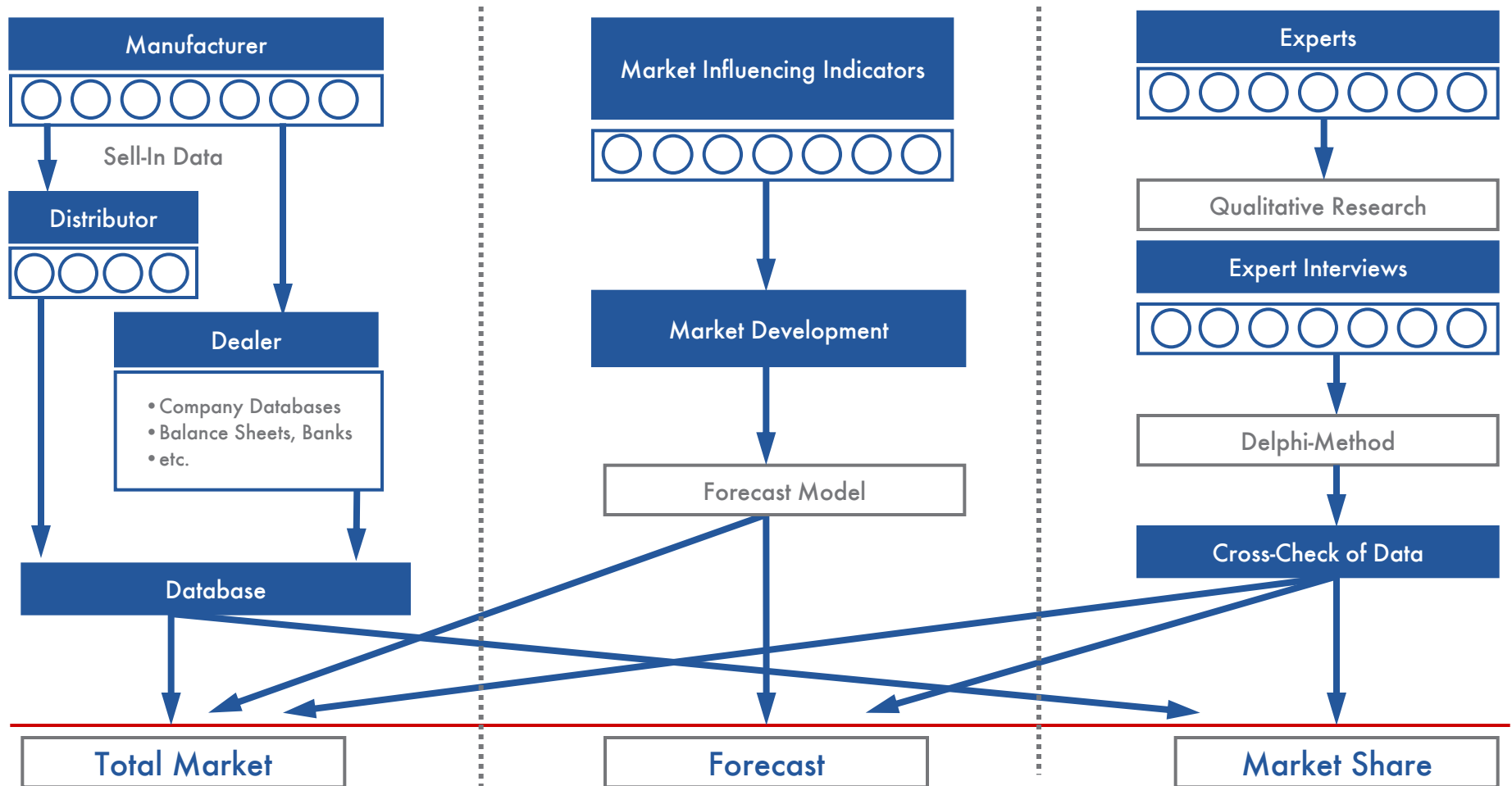
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

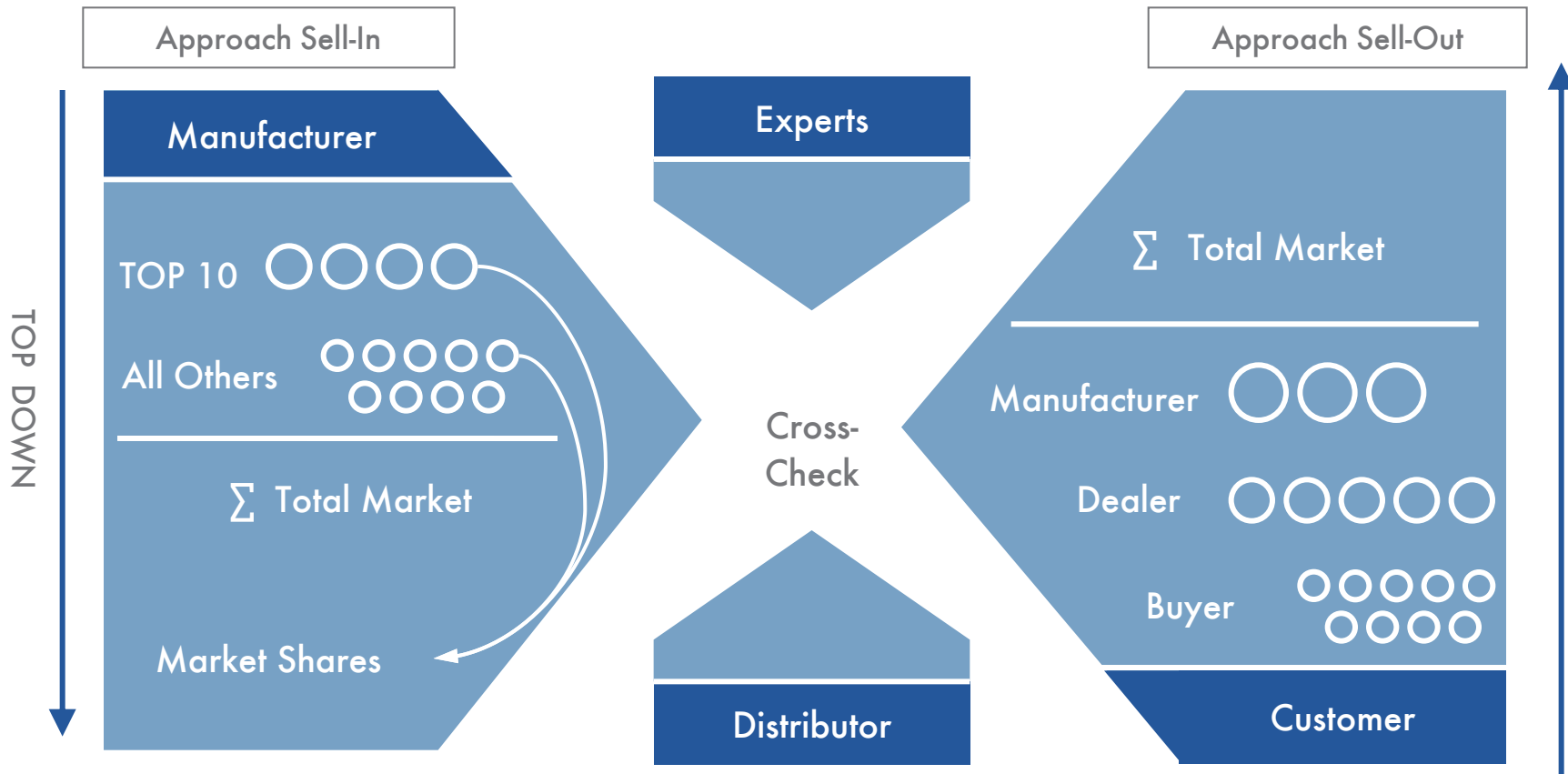
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology



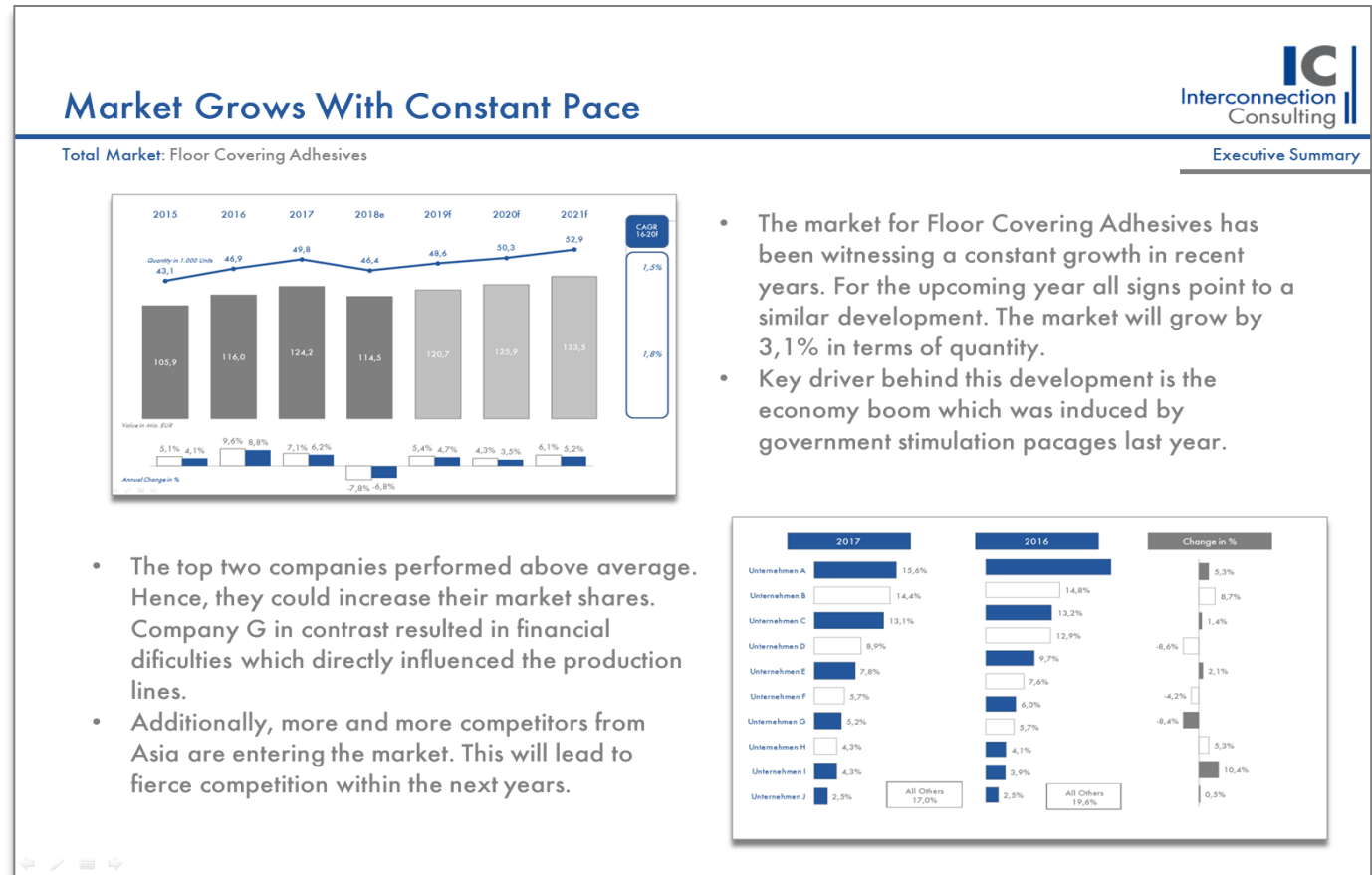
How Do we Cross Check the Data?



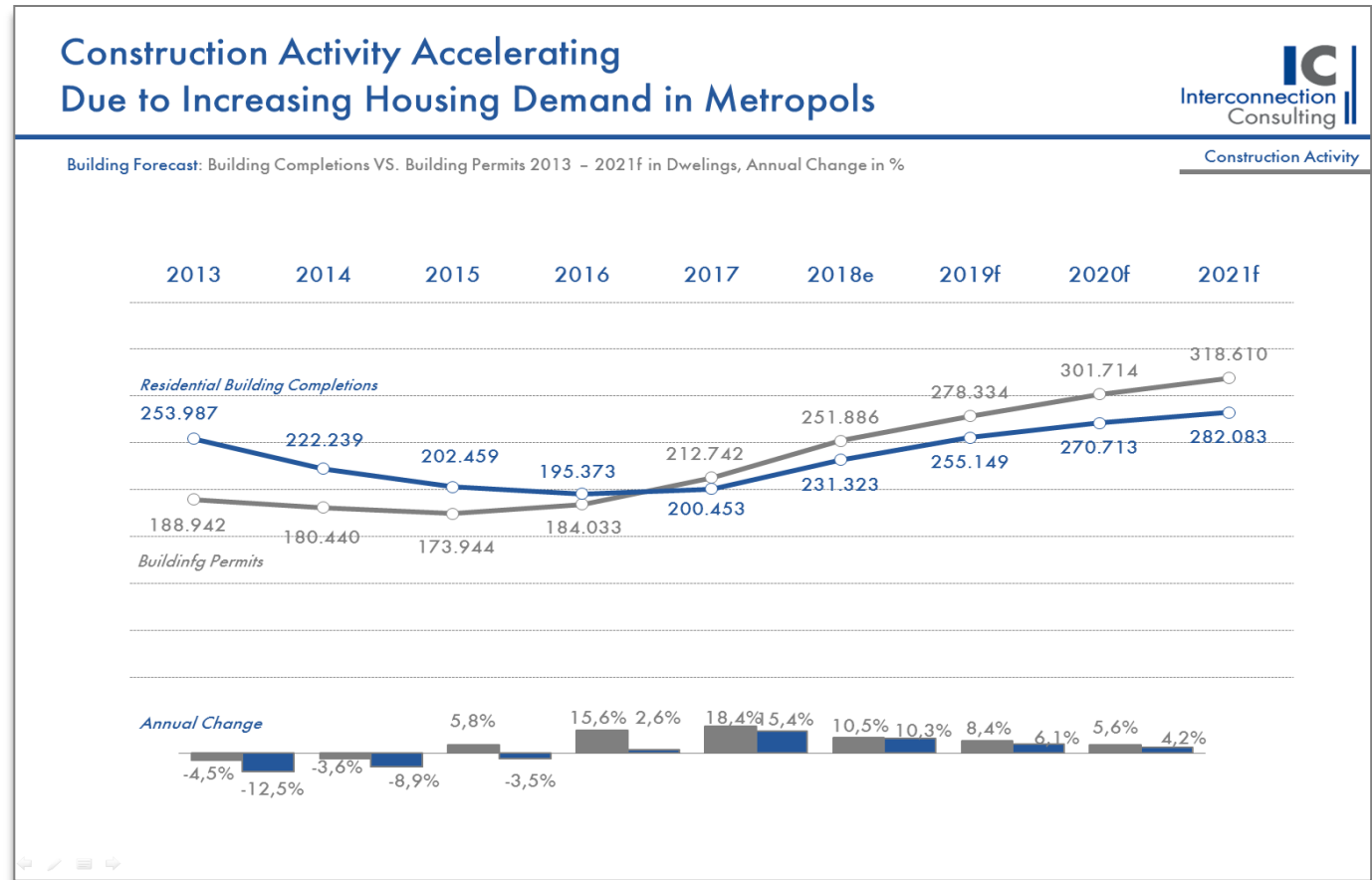
The IC Market Tracking® is modularly built and consists of the following sections:

- 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.

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

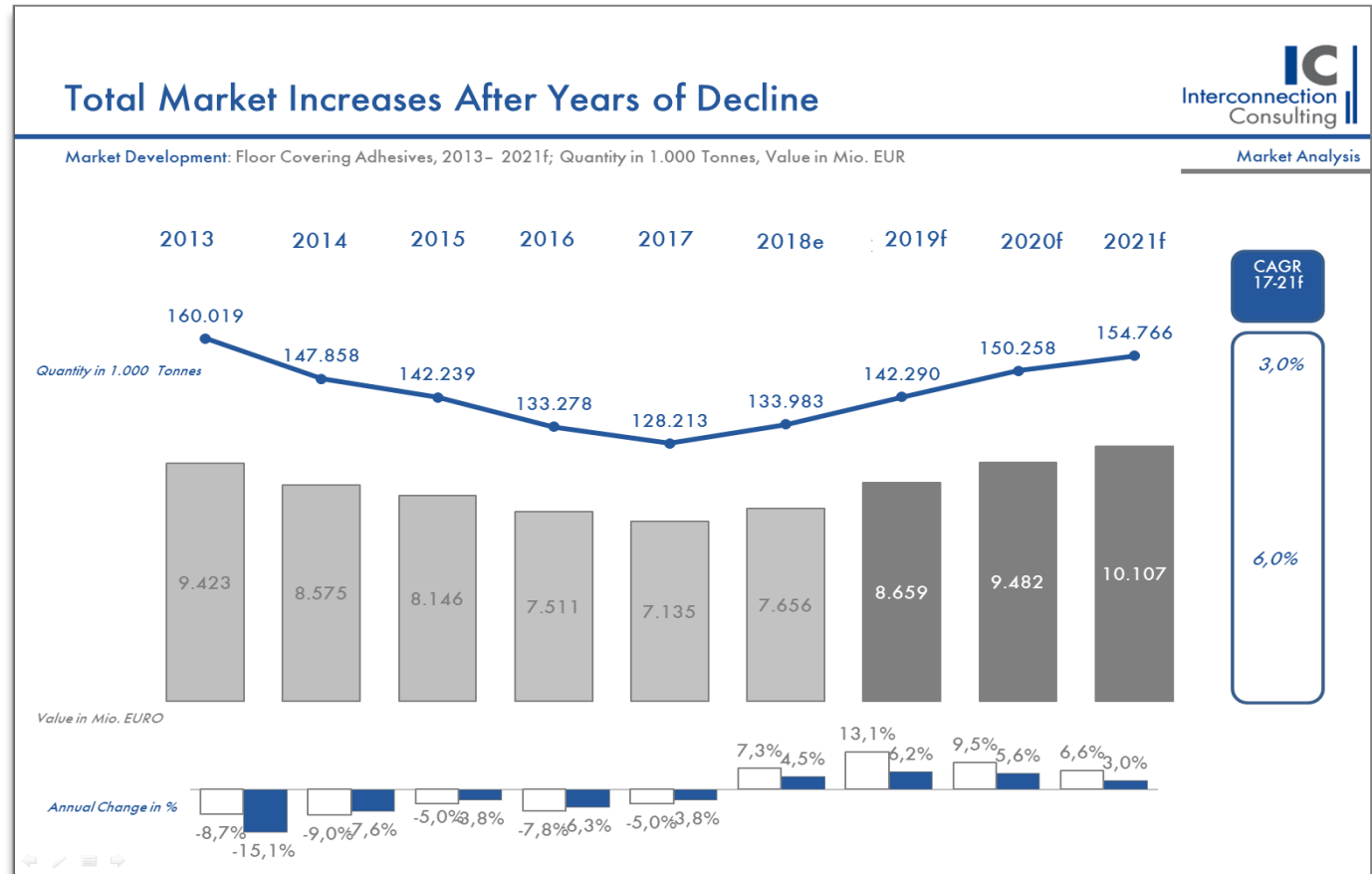


- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows sample figures.*



Total Market Development and Forecast

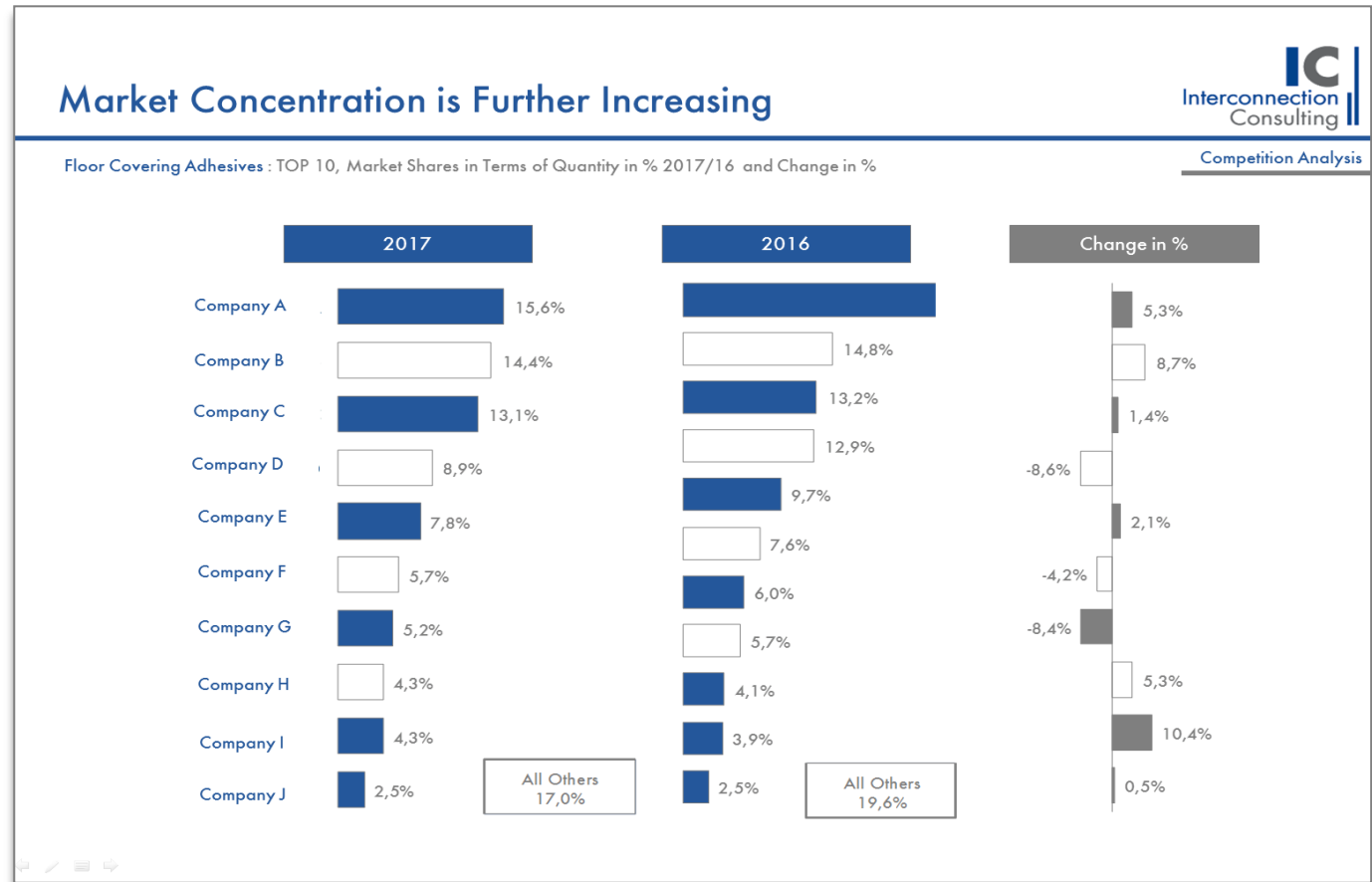
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- Overview of the Product Group Segmentation, Distribution Channels 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 modeling.
- 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

Investment Plan for Your Market Research

		IC Subscription*	Scale of Discounts**
	Single Issue		
Single Country	€ 3.500,-		€ 9.000 -20%
All Countries**	€ 12.600,-		€ 13.000 -30%
			€ 17.000 -40%

- Available countries**
- Germany
 - Austria
 - Switzerland
 - France
 - Italy
 - Benelux

* **IC Subscription:** 20% 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 Special** (scale of discounts are not applicable, subscription applies)
 Price includes an interactive PDF Document. All prices shown exclude sales tax

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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 flooring 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

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Inquiry

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 80/ per Country
- Optional: Hard Cover: 150 €

Price

- Single Country: 3.500,-€
- All Countries: 12.600,-€

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 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, Switzerland, France, Italy, Benelux

Product Groups

Dispersion adhesive, Contact adhesive, PU Adhesives, Synthetic resin glue, MS Adhesives, Fixative, Glue

Application Areas

Linoleum/cork, PVC / Plastic, Textile, Parquet/ Wood, Universal Adhesive

Distribution Channels

Building Material Trade / DIY, Wholesale, Specialist companies, Direct

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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E-Mail: tarasenko@interconnectionconsulting.com



Yes, we would like to order the IC Market Tracking® Floor Covering Adhesives In Europe 2018

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



Industry/Region

- Germany
- Austria
- Switzerland
- France
- Italy
- Benelux
- All Regions

Single Issue

- 3.500,- EUR
- 3.500,- EUR
- 3.500,- EUR
- 3.500,- EUR
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