



IC Market Tracking

Roof & Construction Sealings 2018

- Germany
- Austria
- Switzerland
- France
- USA

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.



Roof & Construction Sealings

Germany	Austria	Switzerland	France	USA
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Material Group	Customer Segment	Business Segment	Distribution	Application Type
Bitumen	Residential	New Construction	Direct	Roofs
Plastic	Non-Residential	Renovation	Indirect	Building Construction
Elastomers (Synthetic rubber)	Others			Other Construction
				Others

For each segment we show the total market development from 2012-2020 and the market shares of the top players for the years 2016 and 2017e.

Material Group
Bitumen
Plastic
Elastomers (Synthetic rubber)

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

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

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

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
Non-Residential
Others

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

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

Other than buildings, f.e bridges, pools, tunnels, other construction....

Business Segment

New Construction

Sealings on newly constructed buildings.

Renovation

Renovation of buildings and other areas which includes sealings.

Application Types

Roofs

Especially flat roofs, not considering humid isolation.

Building Construction

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

Other Construction

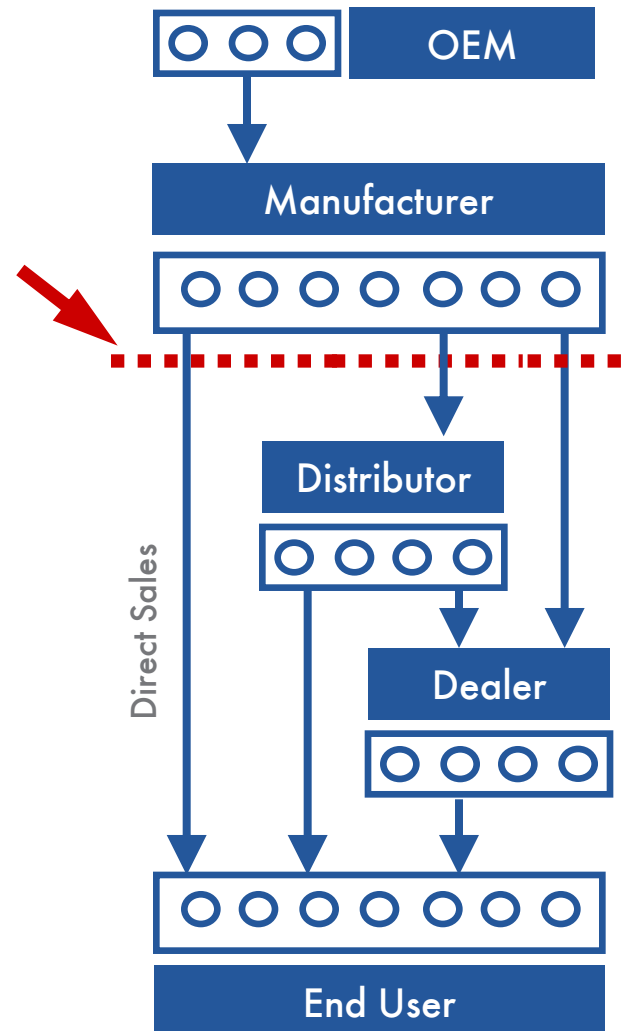
Tunnels, Bridges, Parking Lots, Roads, Rails...etc

Others

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

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.



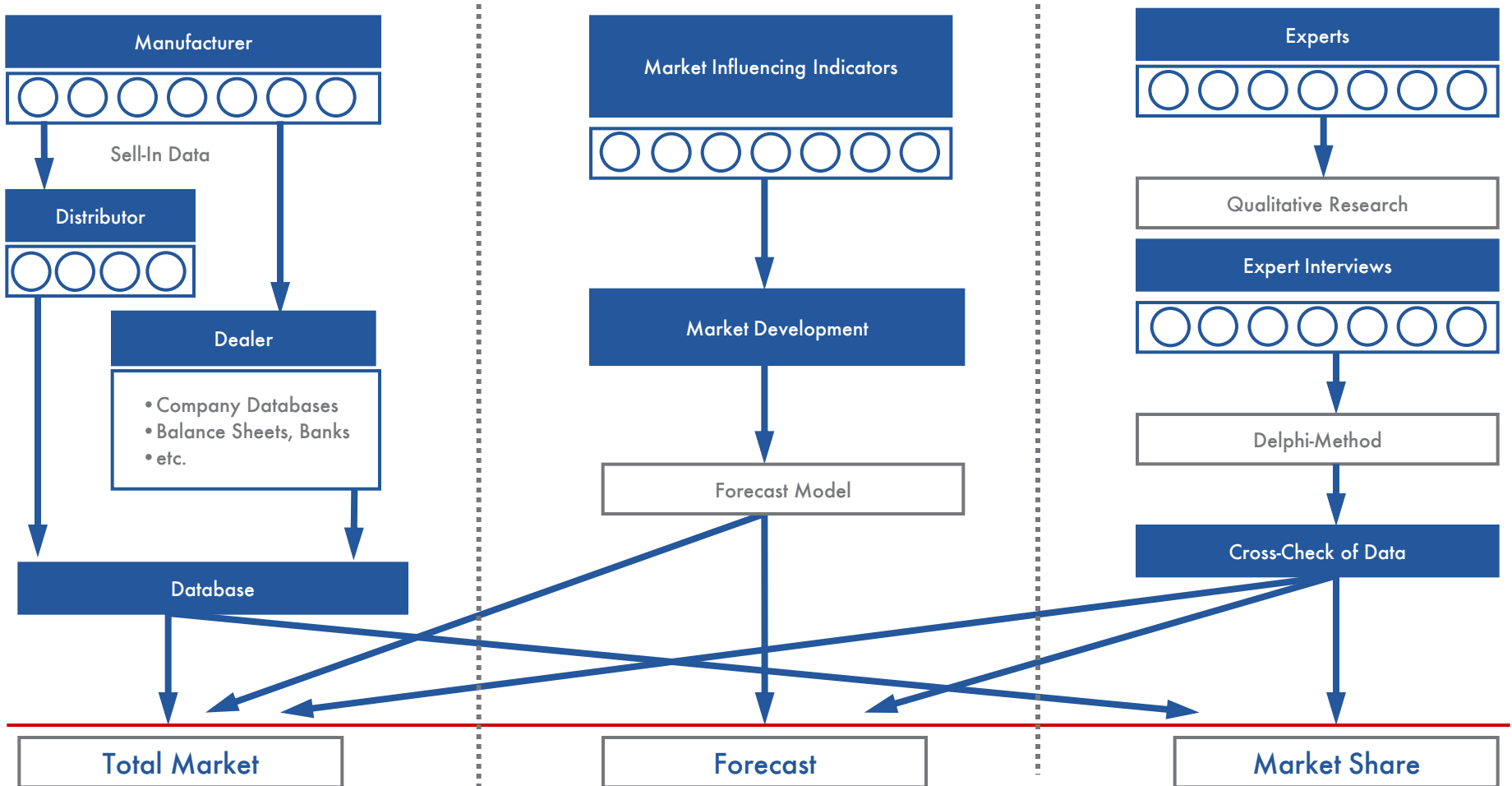
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

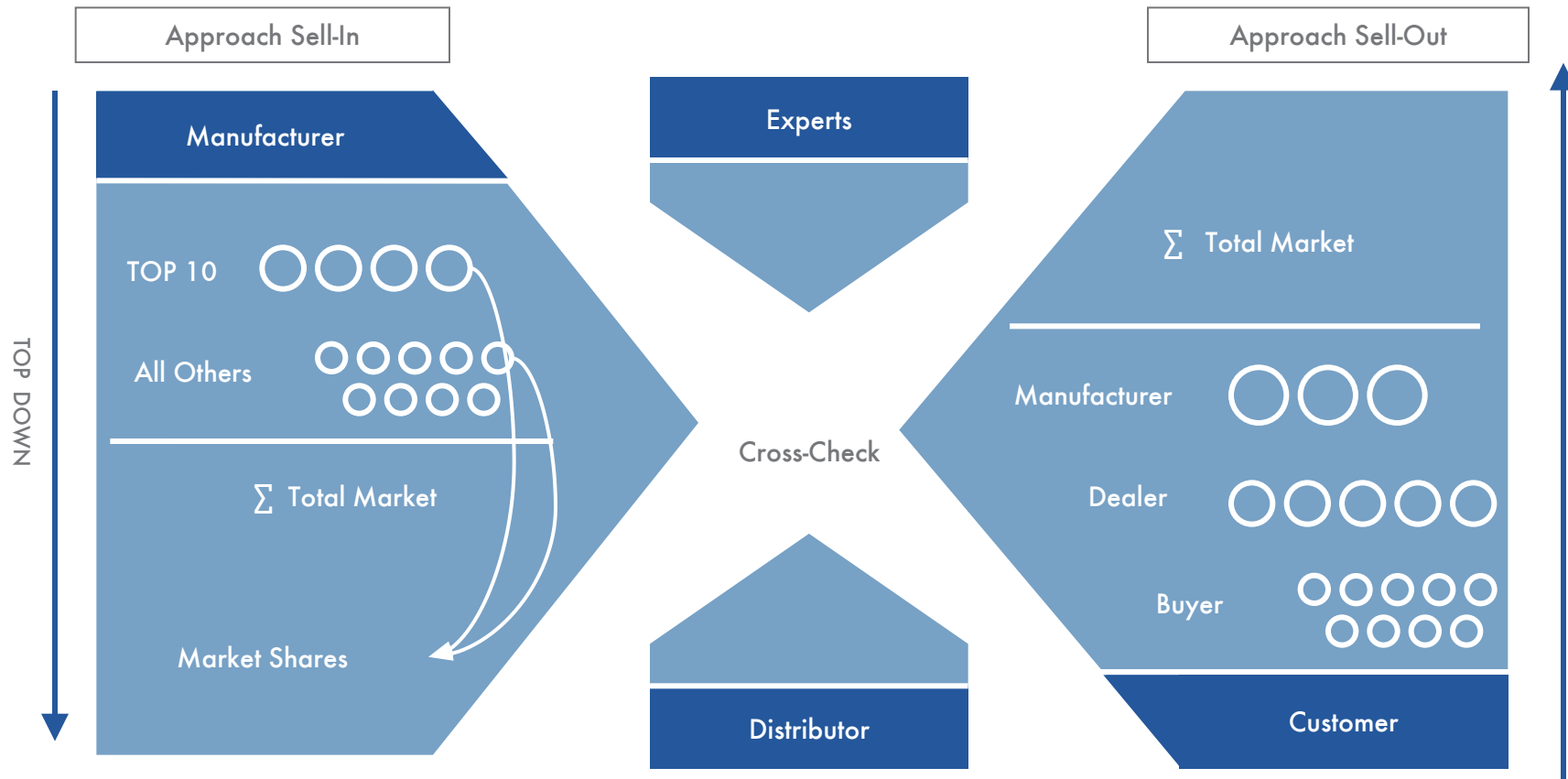
Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology

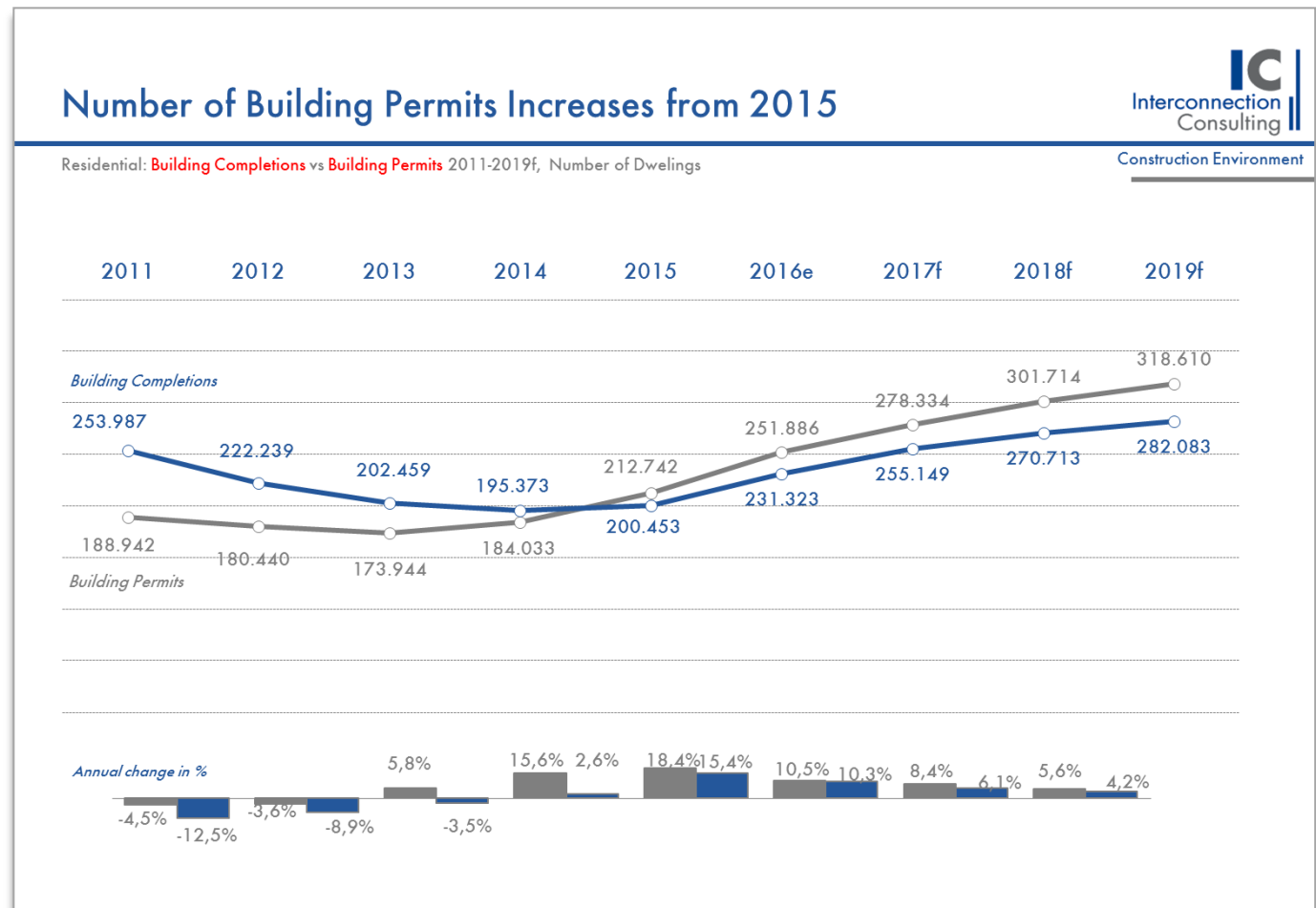


The IC Market Tracking® is modularly built and consists of the following sections:

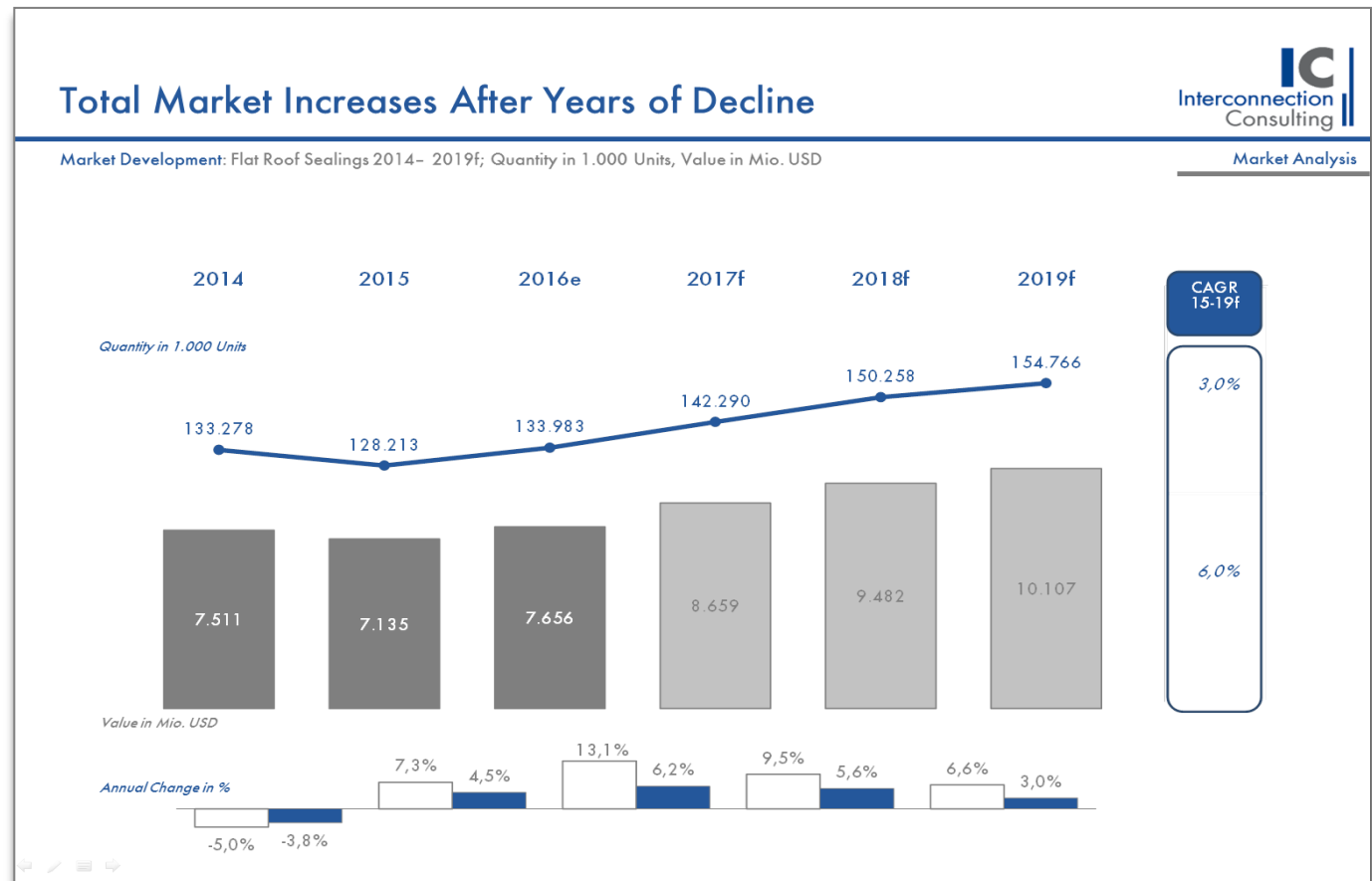
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- The **Total Market Analysis** shows the development 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**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

How Is the Market Environment Developing?

- Overview of the Development of relevant micro- and macro economical market influencing Factors.
- This Sample Chart shows fictive figures.

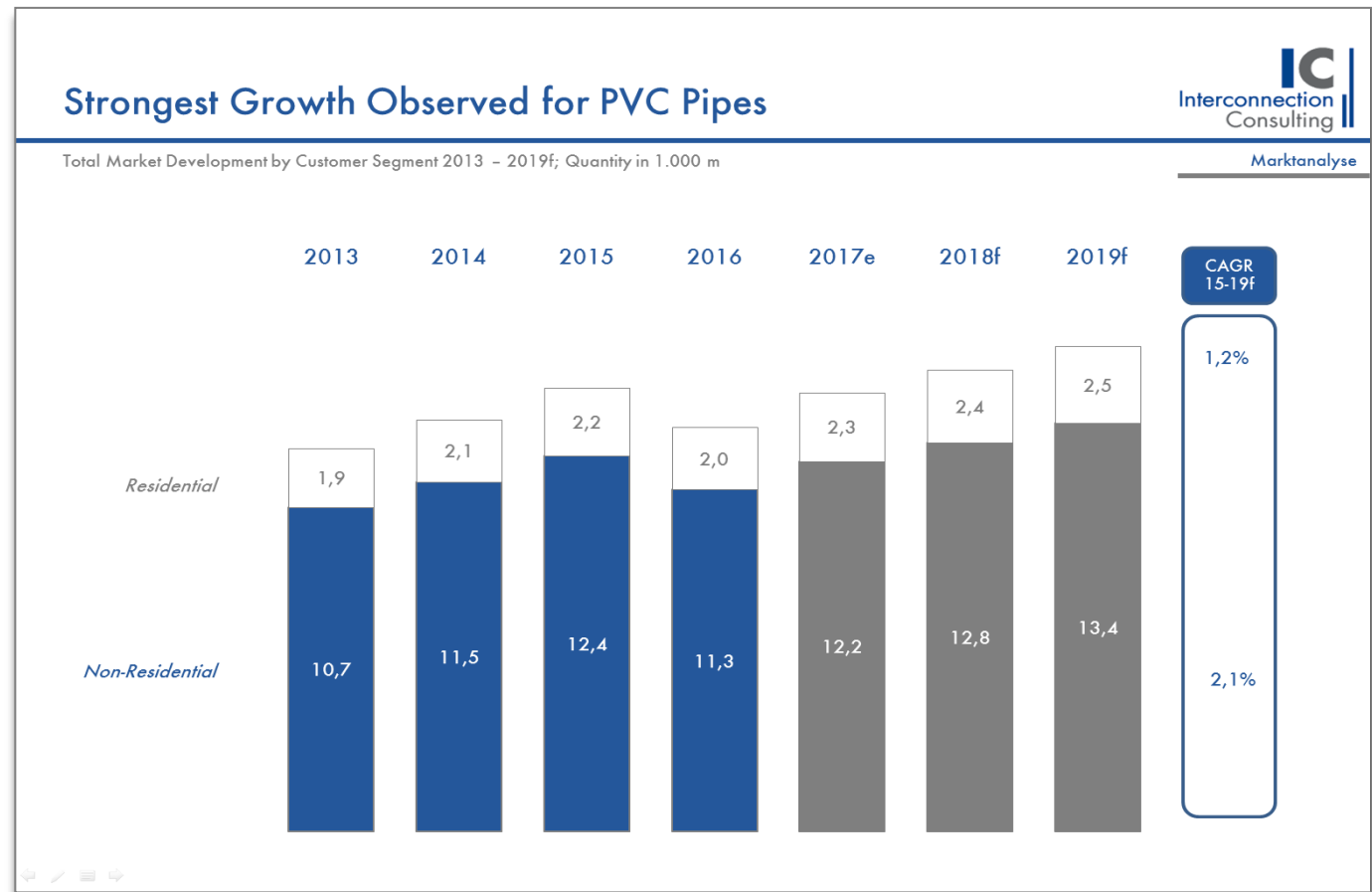


- ❑ *Presentation of Total Market & Forecasts for the next three years.*
- ❑ *Overview of Market Development according to regions, market segmentation in different customer segments.*
- ❑ *This Sample Chart shows fictive figures.*

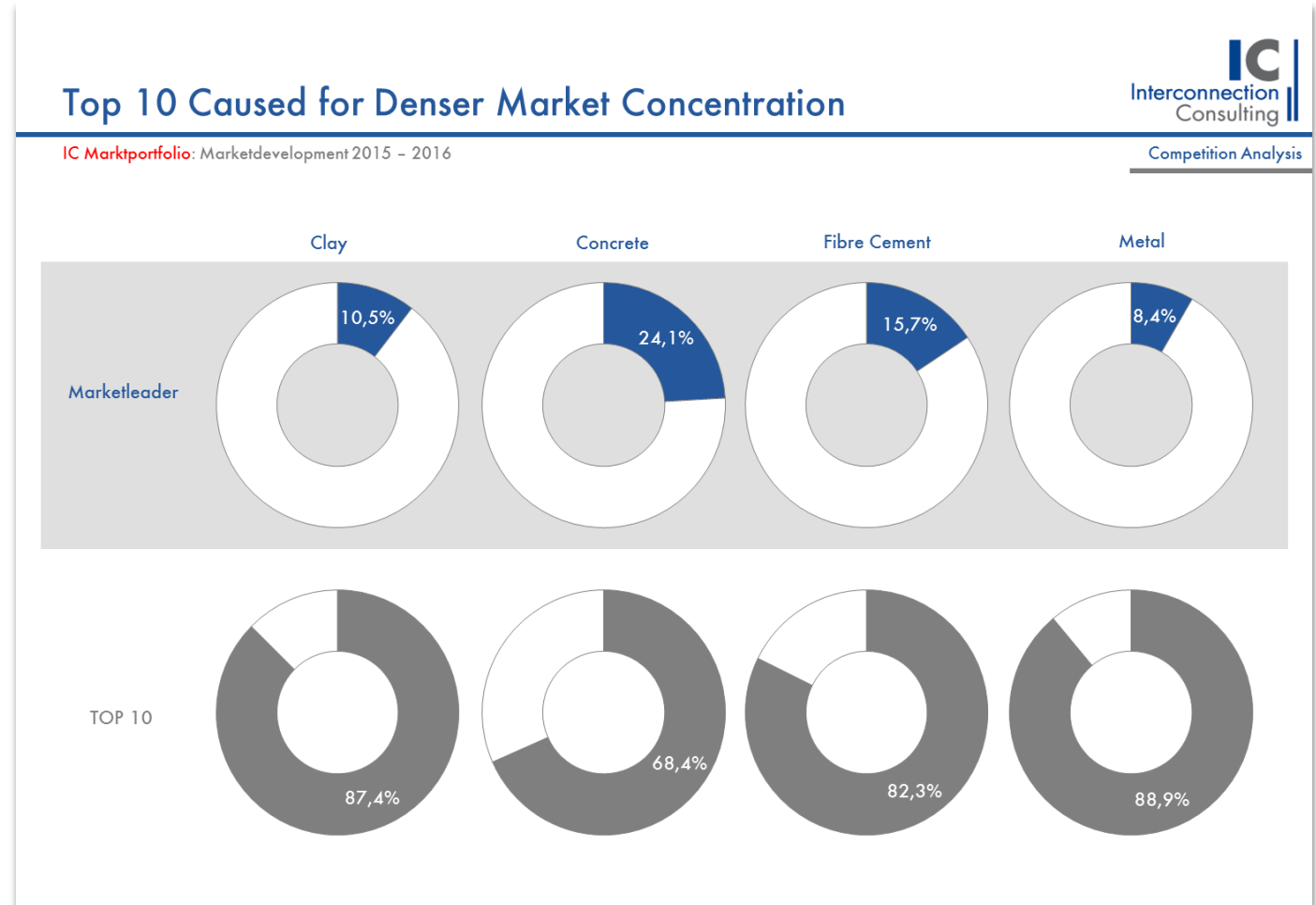


Size and Market Shares of Different Segment

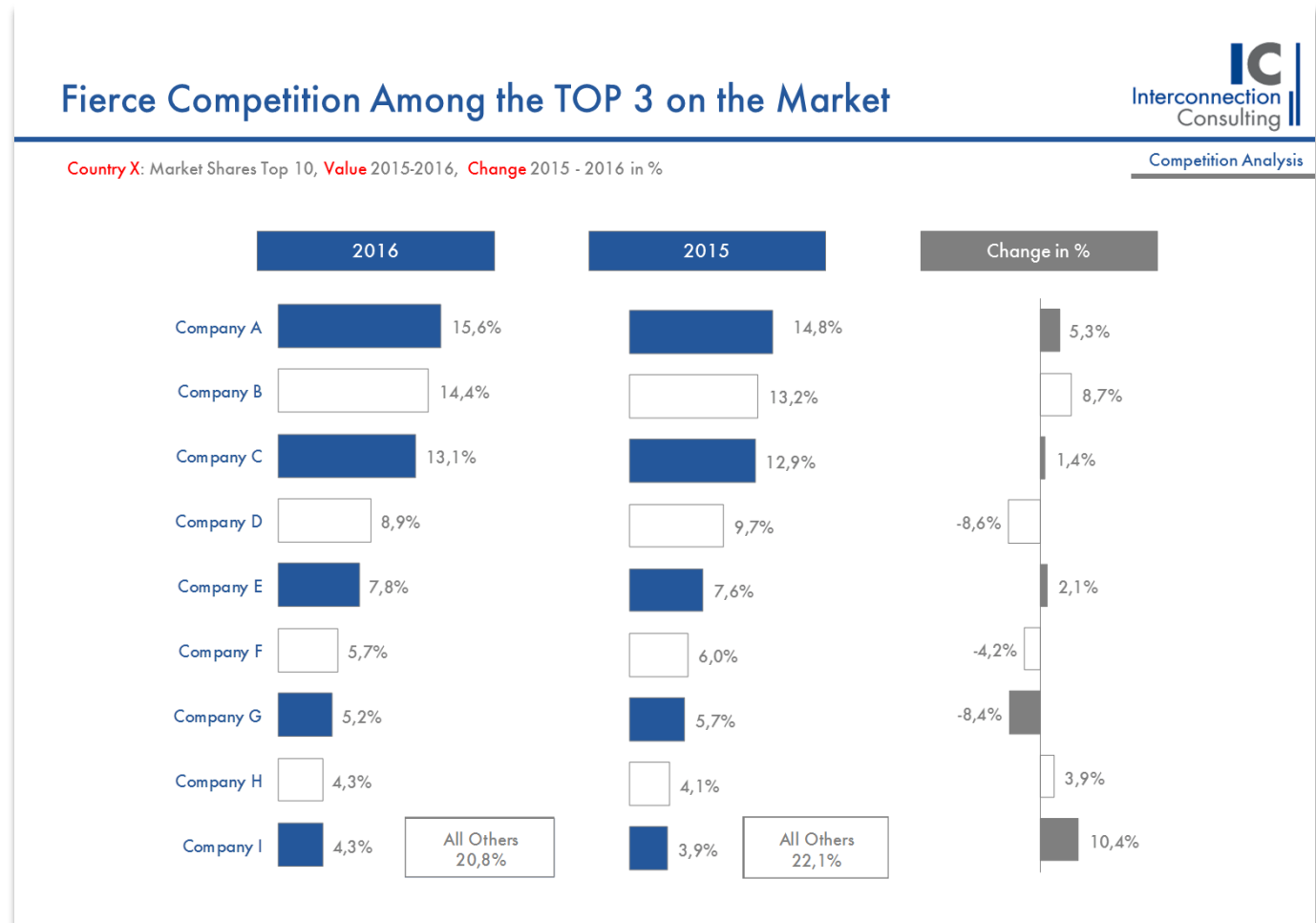
- ❑ *Presentation of different Segments and their Market Shares*
- ❑ *Forecasts for the next three years*
- ❑ *This Sample Chart shows fictive figures.*



- ❑ Detailed presentation of most important companies regarding market shares, development, etc.
- ❑ This Sample Chart shows fictive figures.



- ❑ Detailed presentation of most important companies regarding market shares, development, etc.
- ❑ This Sample Chart shows fictive figures.



- Additionally to the visualised 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)


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 - #	
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

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

Dieses Chart zeigt fiktive Zahlen zur Illustration

	Single Issue	IC Subscription*	Scale of Discounts
All Regions**	€ 14.385,-		€ 7.000,- 15%
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** Price Special - taking into account the scale of discount
Price includes an interactive PDF Document. All prices shown exclude sales tax

*** Additional countries available on request


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

E-Commerce



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

„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:



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

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we show you the way

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 70
- Optional: Hard Cover

Price

- Price per Country: from 3.950 €
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- 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.



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- 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.

Structure of Study

Language of the report

English

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 behavior, 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.

Market Structure

Regions:

Germany, Austria, Switzerland, France, USA

Material Groups

PVC, Bitumen, Elastomers (Synthetic rubber)

Customer Segment

Residential, Non-Residential, Others

Business Segment

New Construction, Renovation

Distribution

Direct, Indirect

Application Type

Roofs, Building Construction, Other Construction, Others

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 analyzed 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: office@interconnectionconsulting.com



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- Price advantage IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue
- 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
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