



Acoustic Ceilings
in France & Germany
- Quarterly Report

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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
 - 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 - Acoustic Ceilings in France & Germany Quarterly

France

Germany

Per Quarter

Yearly extra

Product Group

Modular/Grid Systems

Baffles/Free Hanging

Seamless

Material

Mineral Fibre

Perforated Drywall

Metal

Other

Customer Segment

Office Buildings

Industrial Halls

Health Care

Commercial Buildings

Other

Business Segment

New Construction

Renovation

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

Product Group

Modular/Grid Systems

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

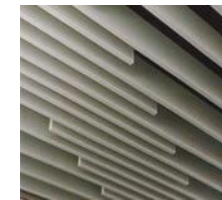
A secondary ceiling, hung below the main (structural) ceiling to balance and control acoustic in the room

Baffles/Free Hanging

A construction or device which reduces the noise pollution in the room. Are designed to hang vertically or horizontally down from the ceiling.

Seamless - Attached

Smooth surfaces free of seam patterns, used to cover large areas completely removing the grid from sight. They are manufactured with several materials, among which gypsum, wood and metal. Their direct application to the ceiling by gluing or by screwing them to hooks makes them different from baffles.



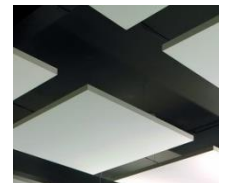
Business Segment

New Construction

Acoustic ceilings are installed in new constructed buildings.

Renovation

Renovation of the buildings and modernisation of the ceiling systems in order to improve the acoustics characteristics of the buildings.



Materials

Mineral Fiber

Mineral fibers made from hard natural or synthetic minerals such as rock wool, and other mineral composites. They are usually classified as being thicker and more dense than soft fibers, thus making the ceilings more resistant



Perforated Drywall

Panel made of gypsum plasterboard pressed between two thick sheets of paper. It can be smooth for better sound isolation or perforated for sound absorption.

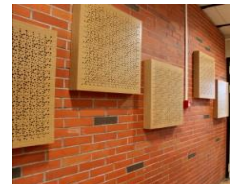
Metal

Acoustic panels made from different types of metal



Others

Other types of materials, including combinations of the ones described above



Application Areas

Office Buildings

Acoustic panels applied in the rooms of office and administration buildings.

Industrial Halls

Acoustic panels applied in the production halls, warehouses, workshops and other industrial constructions.

Health Care

Acoustic panels applied in hospitals, clinics and other medical spaces

Commercial Buildings

Acoustic panels applied in the department stores, malls, shopping centers etc.

Others

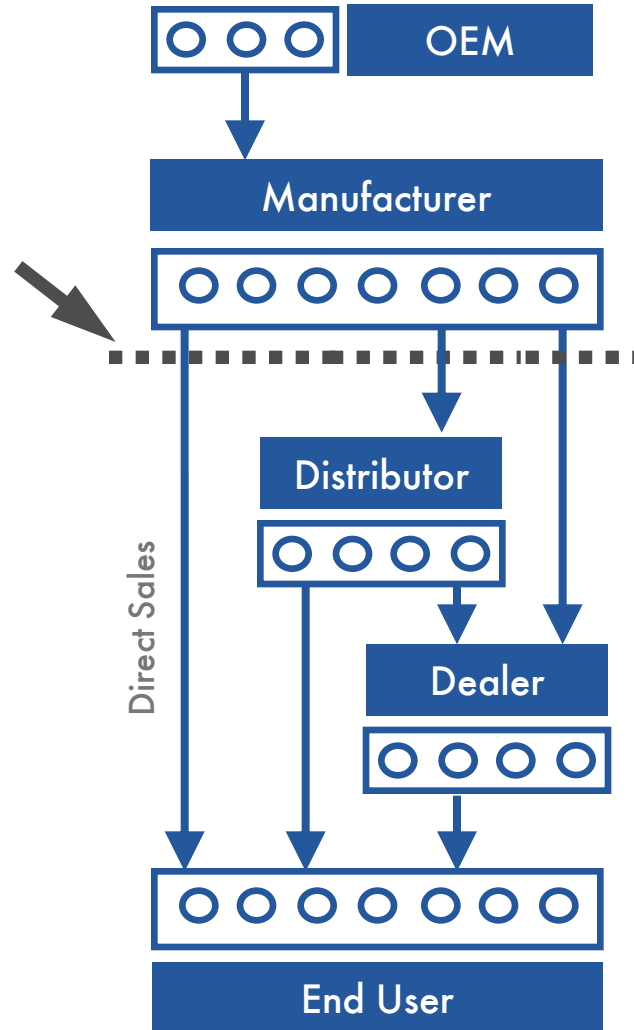
Acoustic panels utilized for other gathering places such as airports, stations, hotels, churches, etc.



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)

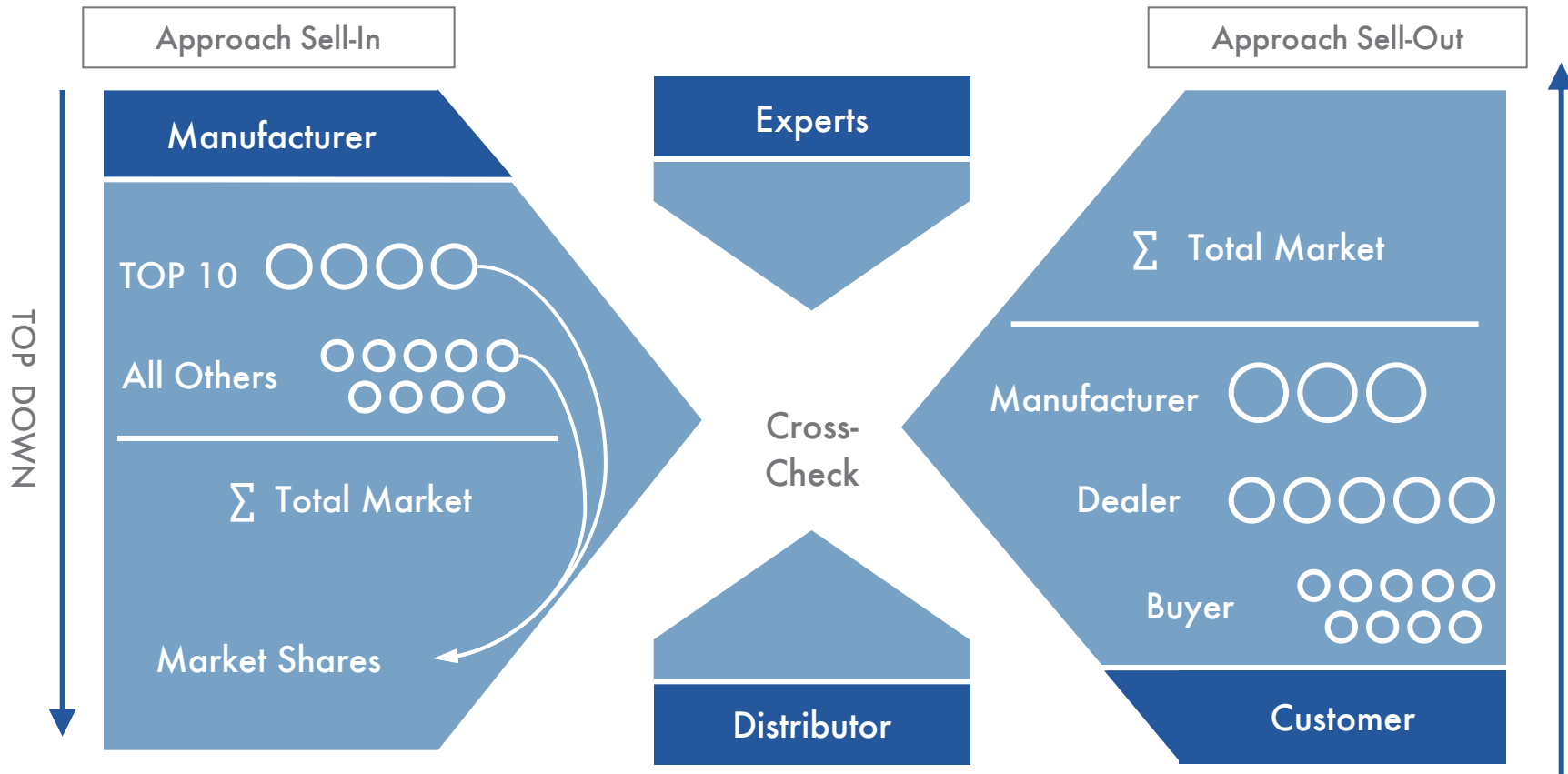
Sales are segmented by the first distribution partner.



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 Cross Check the Data?



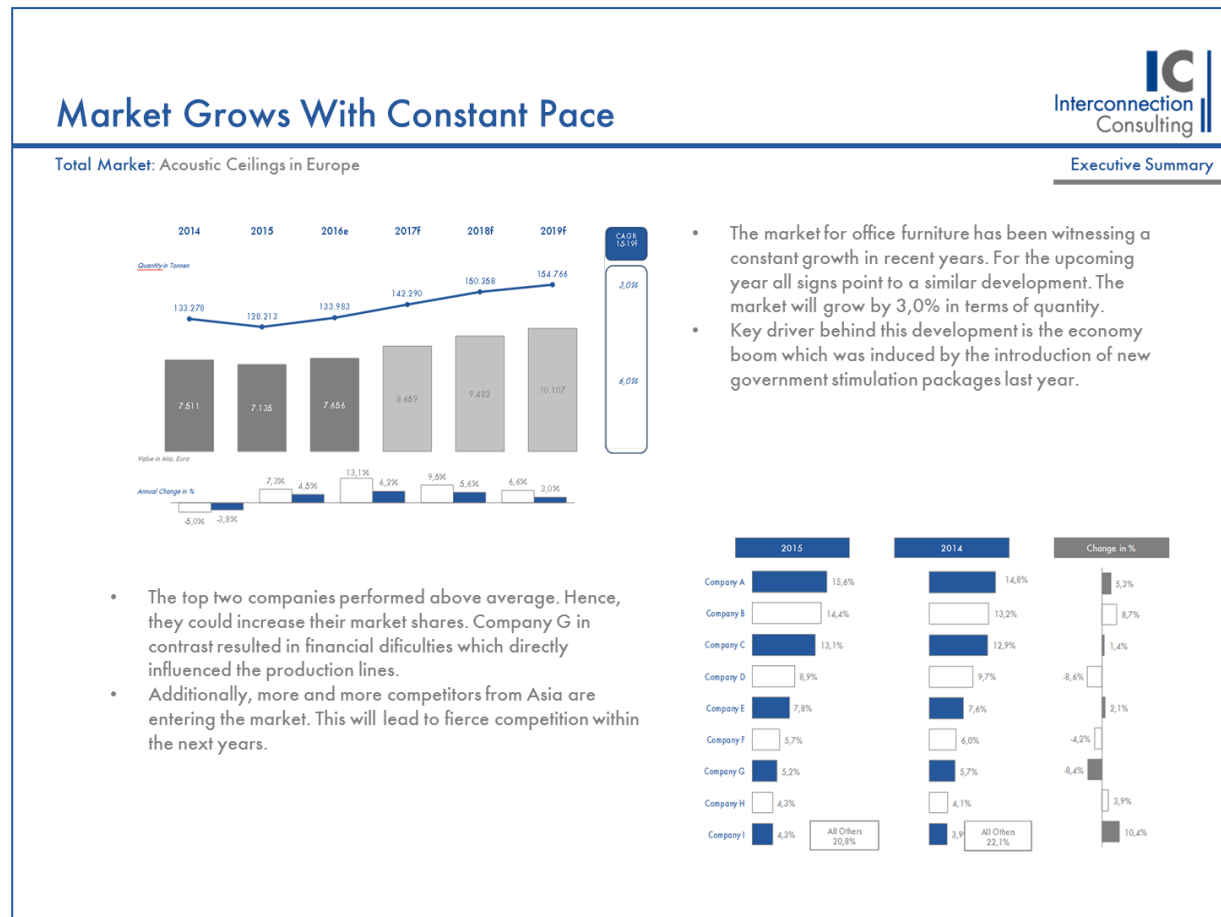
Content of the Report *

| | |
|--|----------------|
| 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

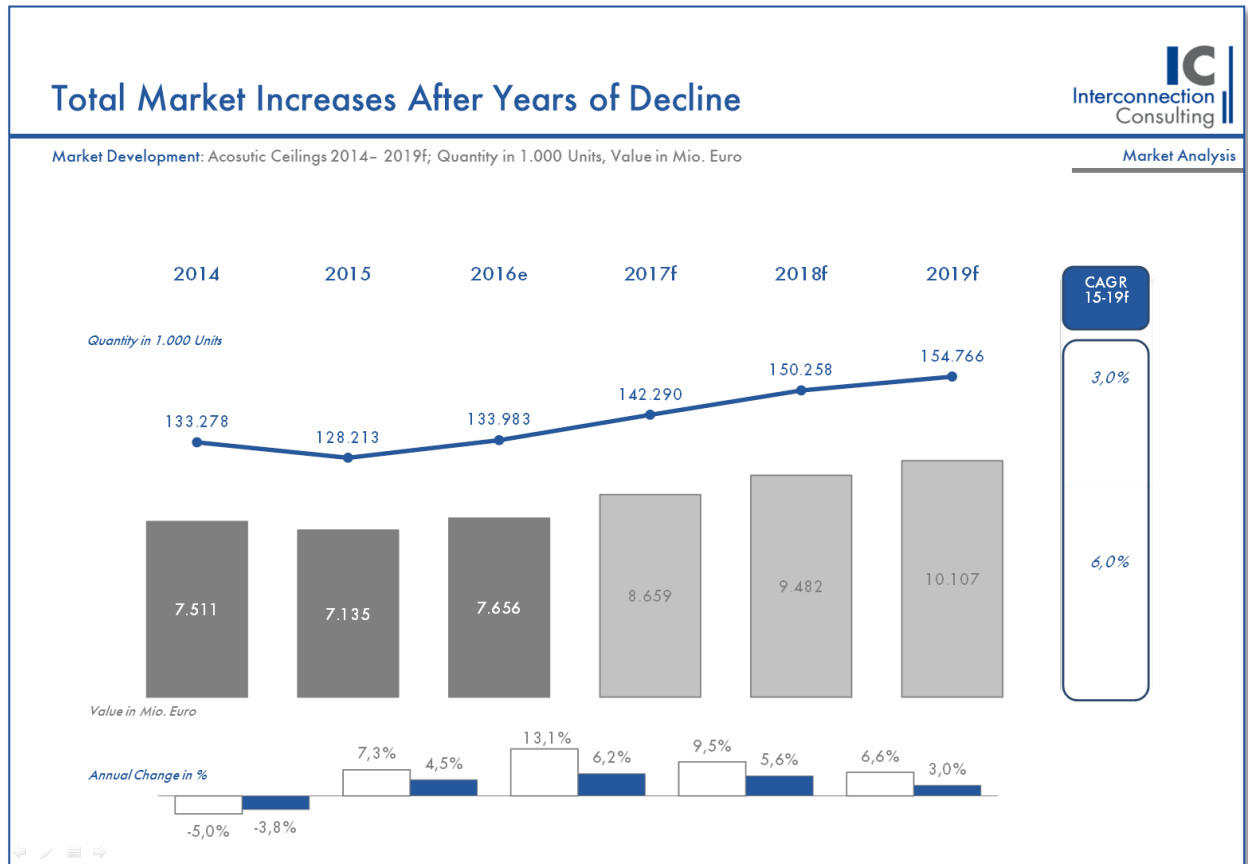
Executive Summary at the Beginning of the Report

- *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

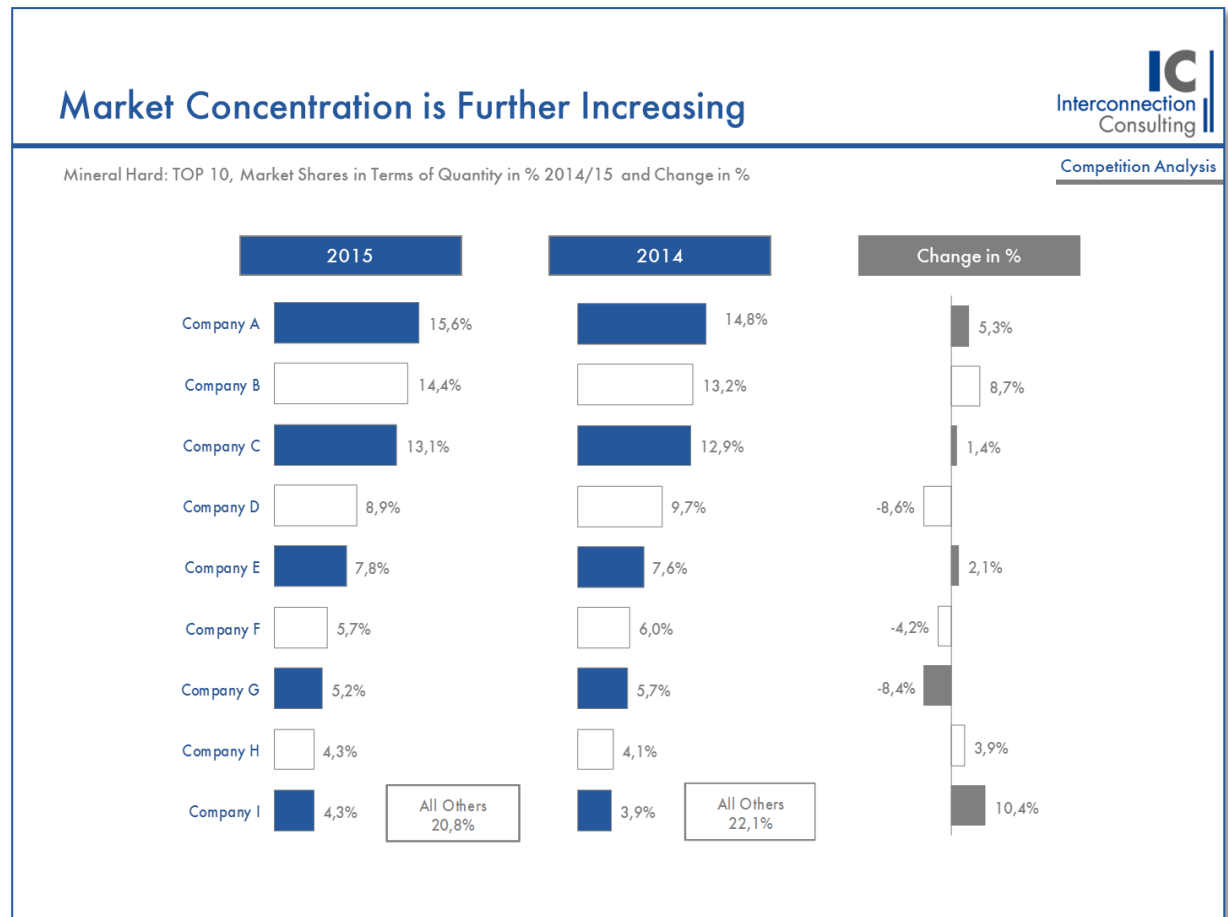
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- This chart shows *dummy figures*.



- 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 Acoustic Ceilings in France & Germany – Quarterly Report

| | Subscription* |
|------------------|---------------|
| France | € 5.950,- |
| Germany | € 5.950,- |
| France & Germany | € 9.950,- |

*Price per year for four quarterly reports + one annual report. The annual subscription is valid for at least 1 year, until it can be terminated. Price includes an interactive PDF in electronic form. All prices excl. VAT.

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- **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 building 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!

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