



IC Market Tracking Pipe Fittings in Europe 2018

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Your Benefits at a Glance

- ✓ You will receive an overview of the **overall market** in addition to **individual market segments**.
- ✓ A detailed **representation of the key markets by country and forecasting until 2020** based off on our econometric forecast model.
- ✓ **A competitive analysis with the provider market shares** and examination of the development during previous years in terms of:
 - Connection Method
 - Application
 - Market Consumption
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.



Pipe Fittings in Europe

France

Germany

UK

Italy

Benelux

Poland

Market
Consumption by

Surface Heating & Cooling

Radiator Connections

Hot & Cold Water Installations

PVC

PVC

PVC

Metal

Metal

Metal

Multi Layer

Multi Layer

Multi Layer

Plastic Pipe Material*

Metal Pipe Material*

Crosslinked Polyethylene (PEX)

Stainless Steel

Polyethylene of Raised Temperature
Resistance (PE-RT)

Steel

Polybutylene (PB)

Copper

Propylene Random Copolymer (PP-R)

For each segment (except*) 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. Those splits marked with * offer total market information only.

Connection Method

Compression Screw Fittings

The compression fitting is composed of an outer compression nut and an inner compression ring or ferrule that is typically made of brass or copper.

Push Fit Fittings

Push fit fittings are simple to use and there is a wide range available. Most of the fittings – elbows, straight connectors, T pieces – are available. It is necessary to push the end of the pipe into the fitting.

Press Fittings

Press fit is a fastening between two parts which is achieved by friction after the parts are pushed together, rather than by any other means of fastening.

Other Fittings

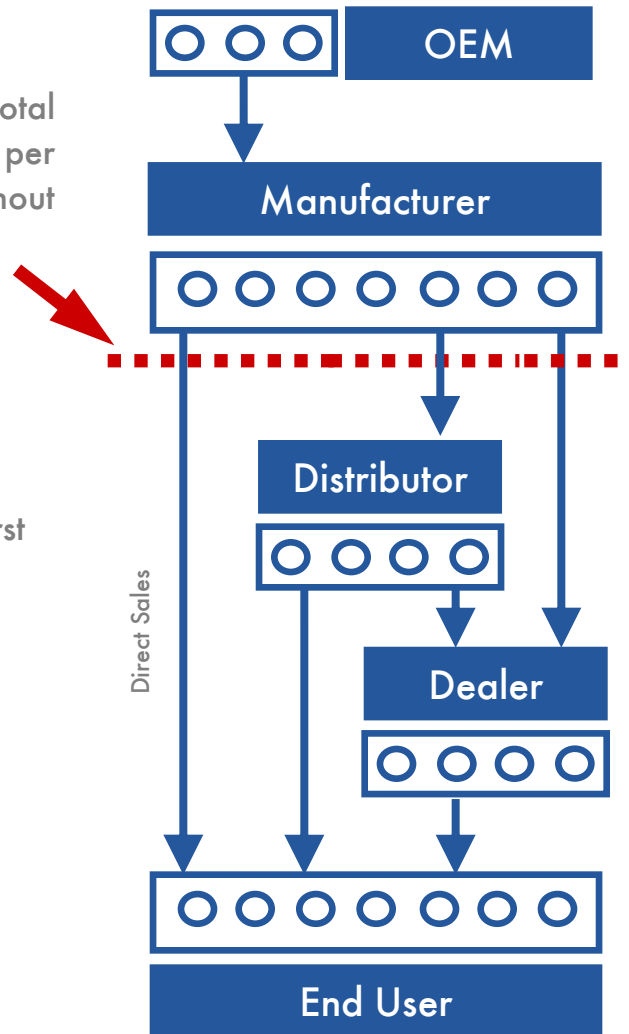
Fittings where the cement (glue) is used for connecting parts, it is sticky like standard glue, but in addition it actually melts the plastic, creating a true weld and other types of fittings.

Infrastructure pipe fittings are not included

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)

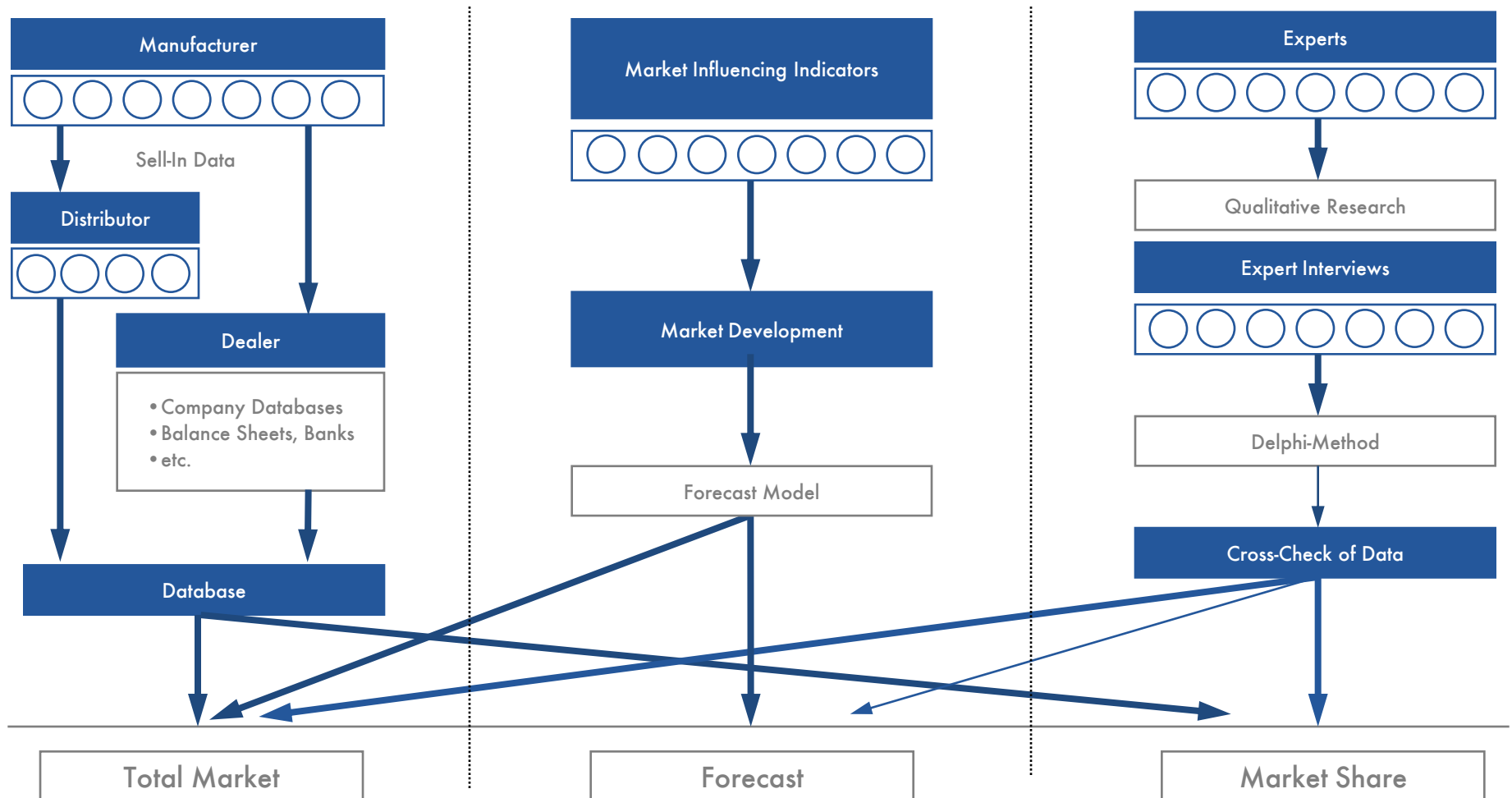
Sales are segmented by the first distribution partner.



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?



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 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**. 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.

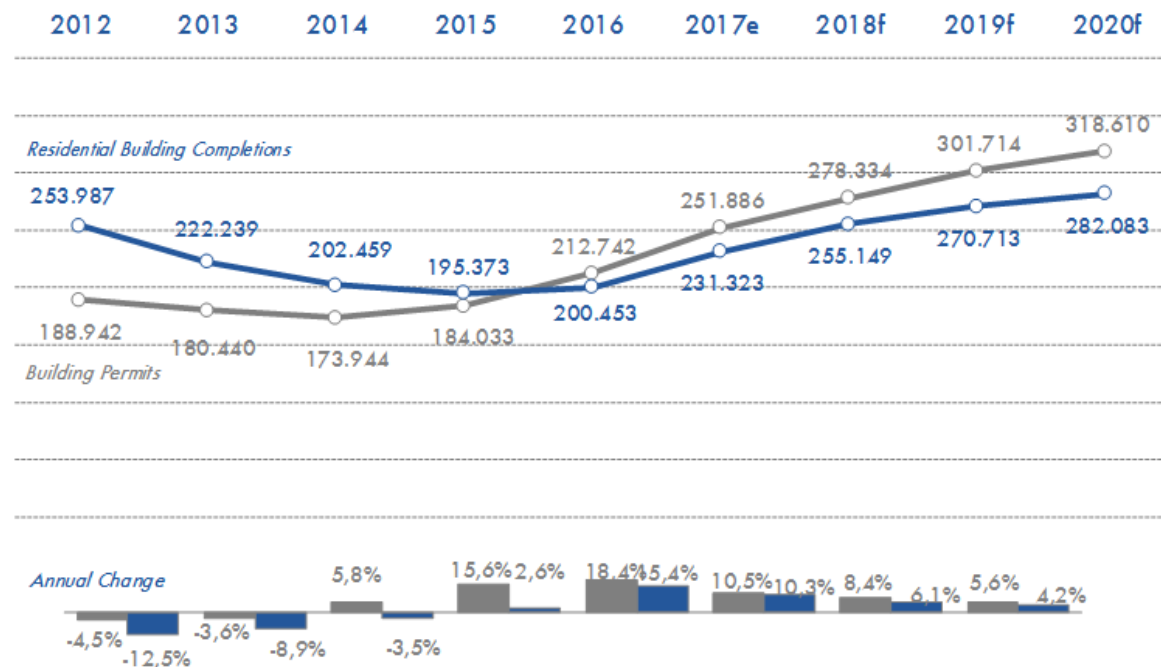
Market Environment Data of our Forecasting Model

- 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*

Residential Construction Activity Accelerating Due to Increasing Housing Demand in Metropolises

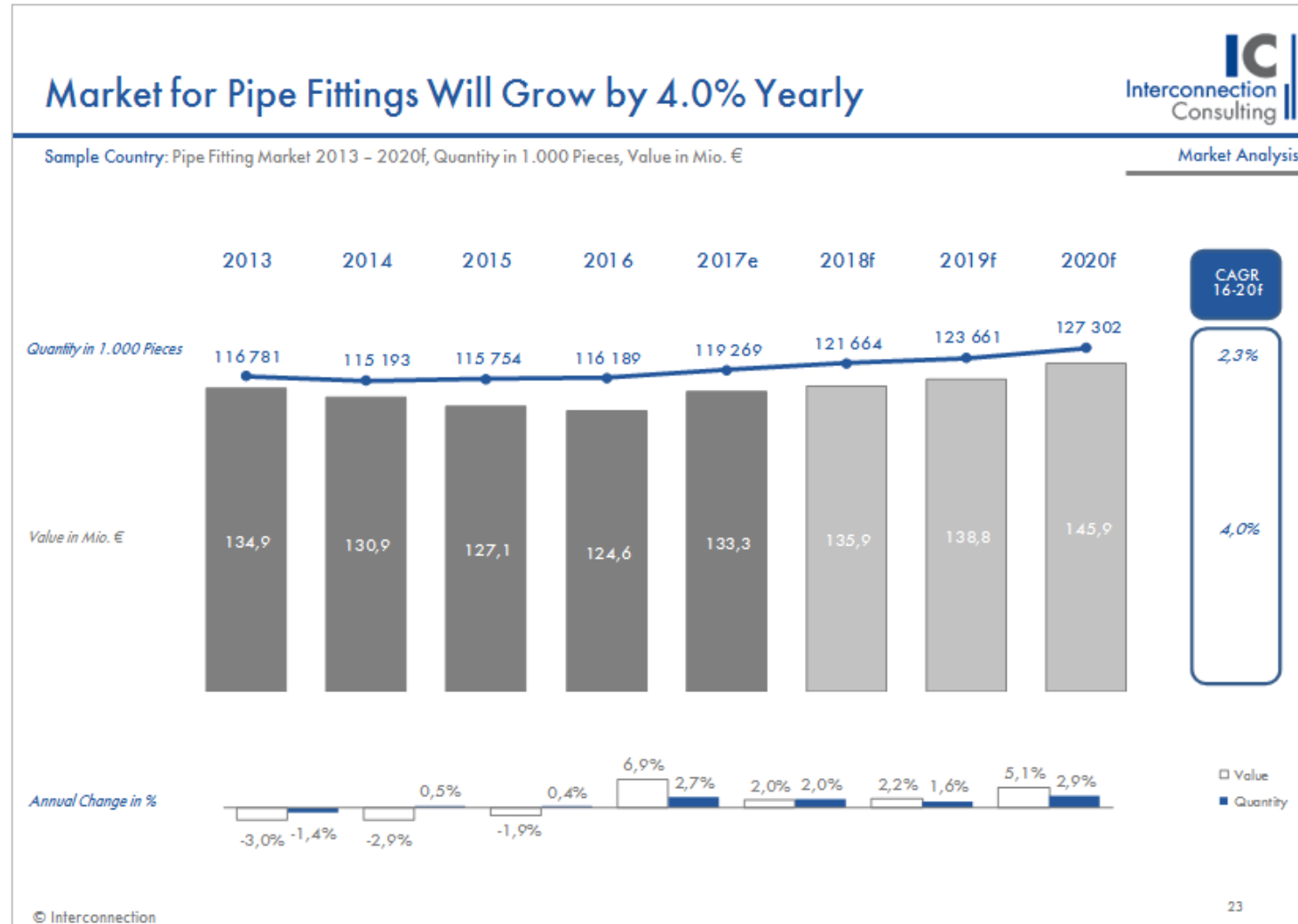
Building Forecast: Building Completions VS. Building Permits 2012 – 2020f in Dwellings, Annual Change in %

Construction Activity

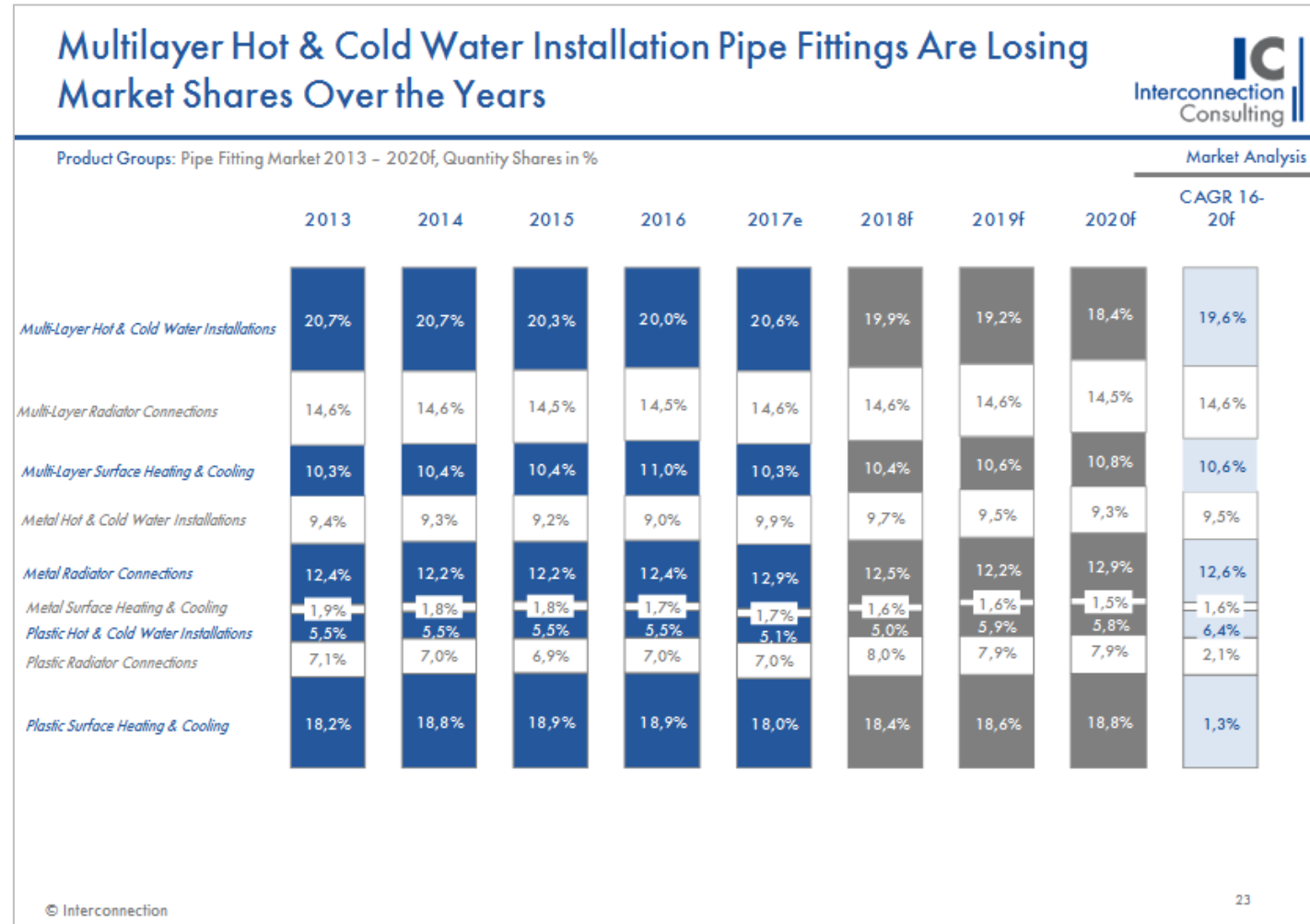


Total Market Development and Forecast

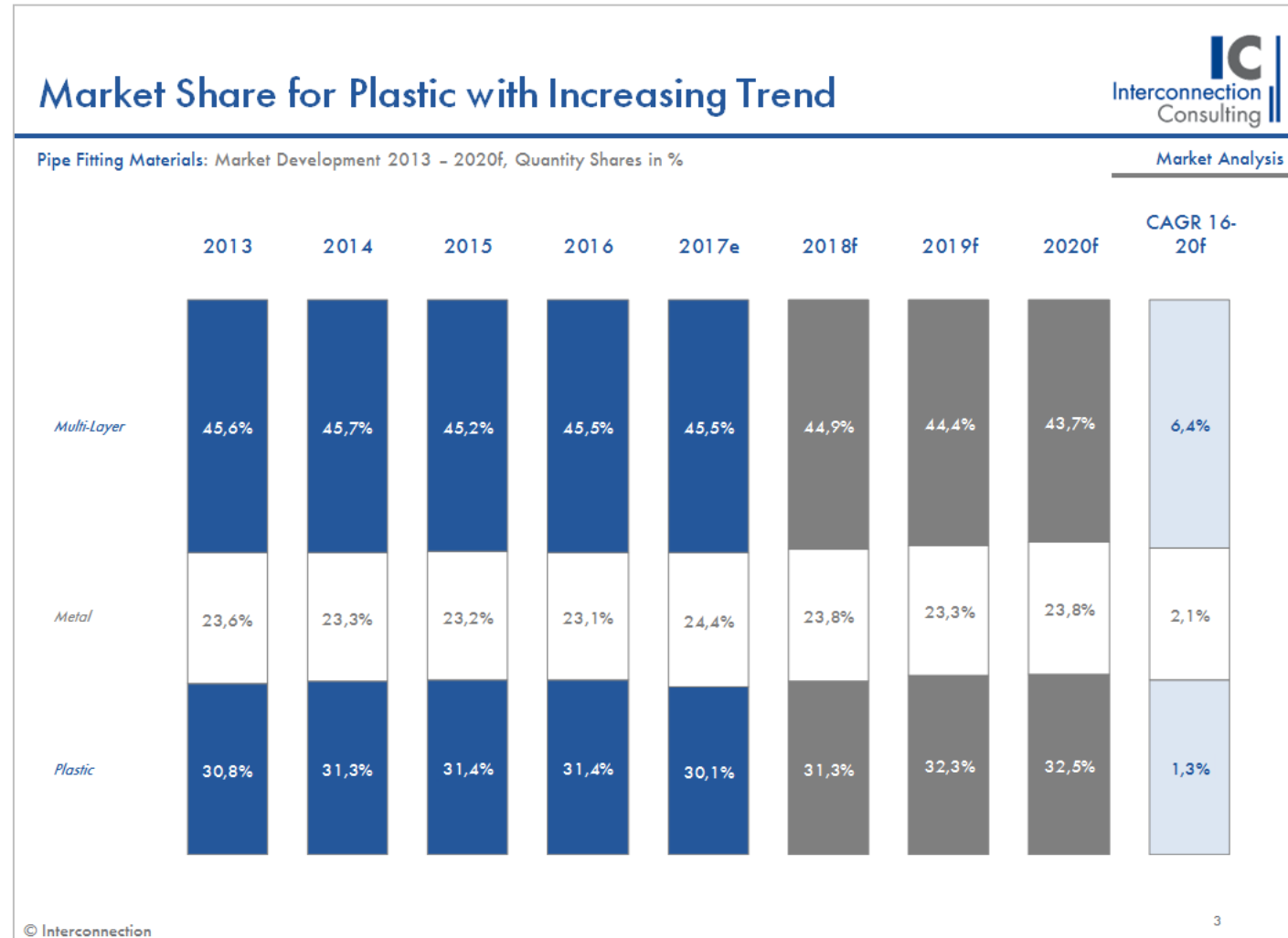
- Overview of the total market until the current year and forecast for the upcoming three years.
- This chart shows *sample figures*



- Overview of the Product Group Segmentation, Materials, Application as well as a Forecast for the upcoming three years about their development.
- *This chart shows sample figures.*



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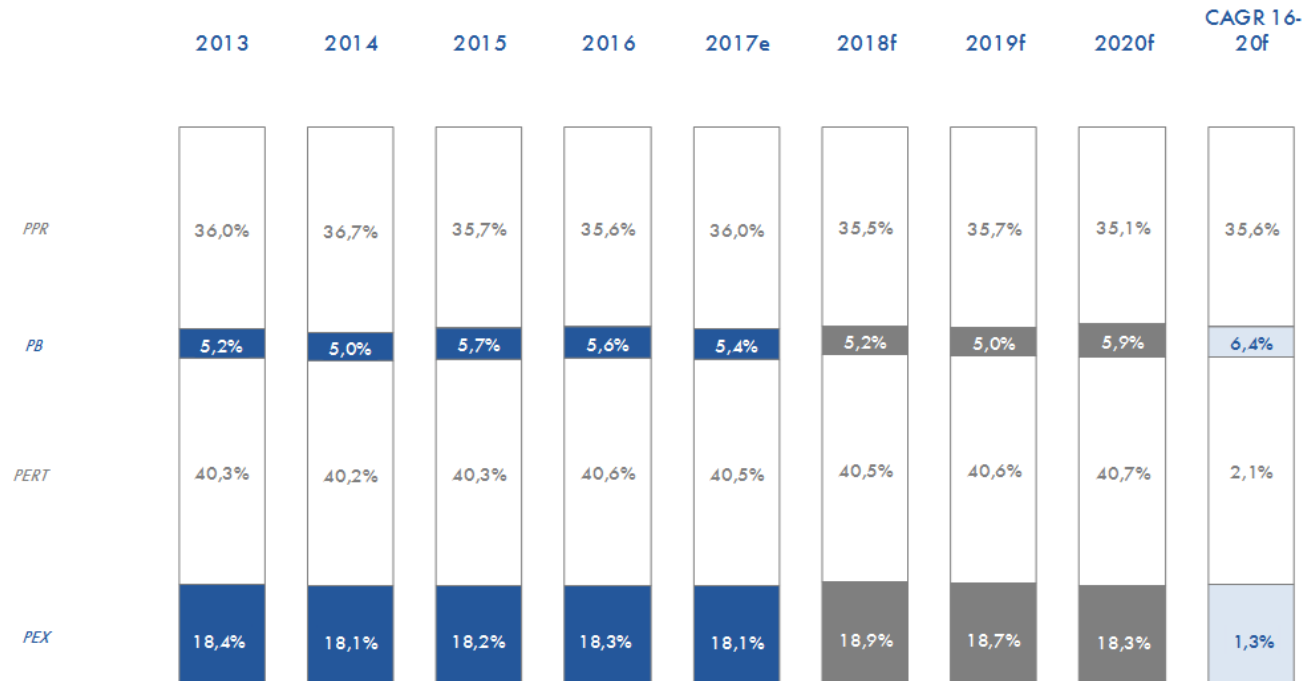


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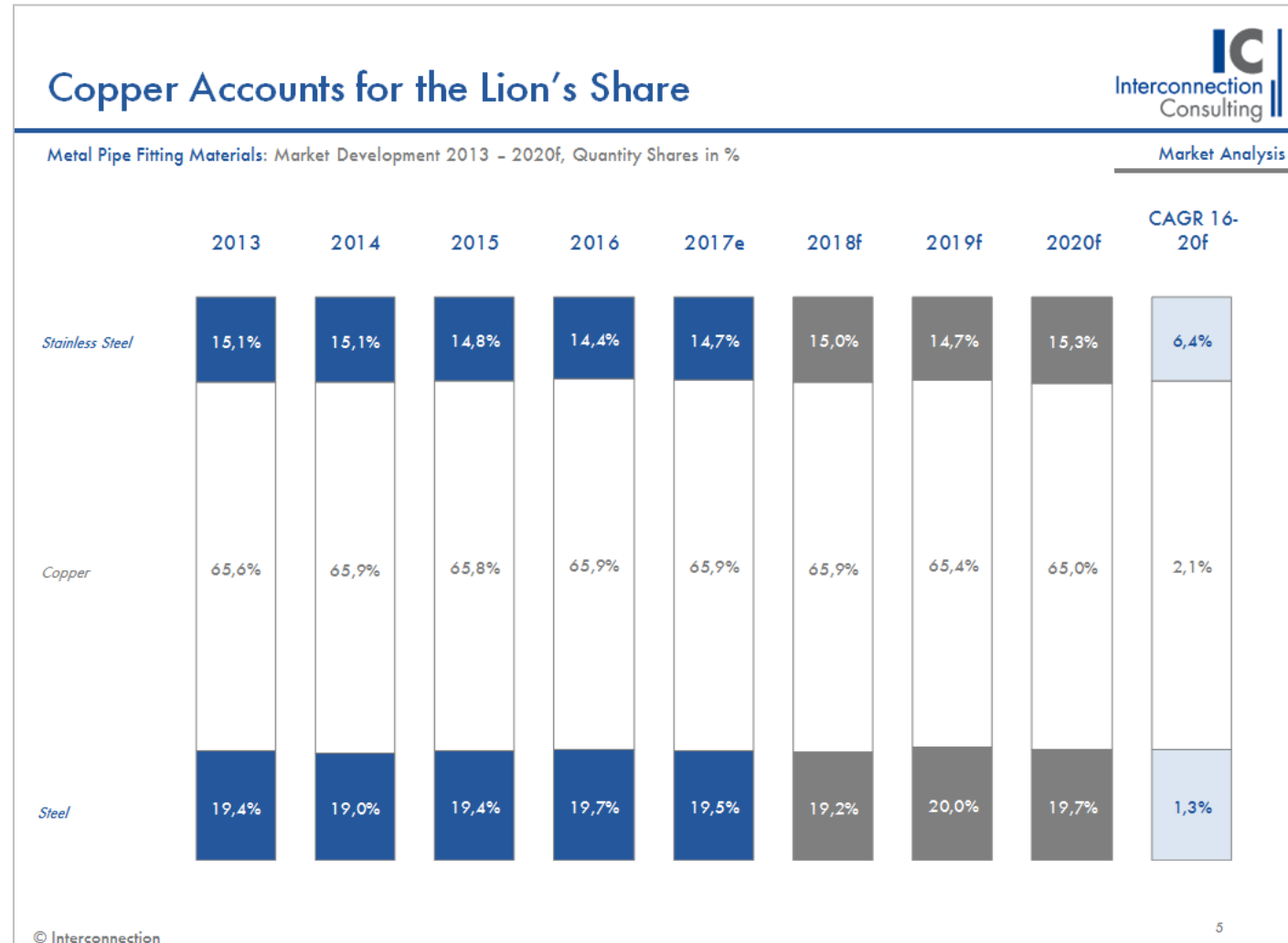
PERT Accounts for 40.5% of the Plastic Pipe Fitting Market

Plastic Pipe Fitting Materials: Market Development 2013 - 2020f, Quantity Shares in %

Market Analysis



- Overview of the Product Group Segmentation, Materials, Application as well as a Forecast for the upcoming three years about their development.
- *This chart shows sample figures.*



- Additionally to the visualized report a Pivot Table will be included
- With use of the analyze 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)
Ø 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)
Ø 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

				Scale of Discounts			
		Single Issue	Subscription *				
Single Country		€ 2.950,-		€ 5.000	- 10%		
All Countries **				€ 7.500	-20%		
				€ 10.000	-25%		
				€ 15.000	-33%		
				€ 20.000	-40%		
Available Countries		GBR	GER	ITA	FRA	Benelux	POL

* 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.

** Prices with regards of the scale of discounts. Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

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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:

- You only pay **2.360,- €** instead of **2.950,- €** per country
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- **Info-Hotline:** For the period of one year you can state questions to the author of the study, furthermore the team of Interconnection will assist you for free in case any methodologic questions in the area of market research will arise in your company.
- As far as possible, we can also put together **flexible subscription packages** (e.g. Biennial subscription, change of countries)
- After receiving 2 editions of the subscribed report, the **subscription can be cancelled without any problems.**

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the sanitary 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 the construction industry.
- Next to market data we offer for the energy 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.



Market Intelligence Tools

Market Analysis



Market Volume
Market Shares & Entry
Competition Analysis

Distribution



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



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

Selected References:

"IC is a permanent partner in market assessment and a helpful tool in decision making."

Mr. Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe

Customers of our Studies:



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

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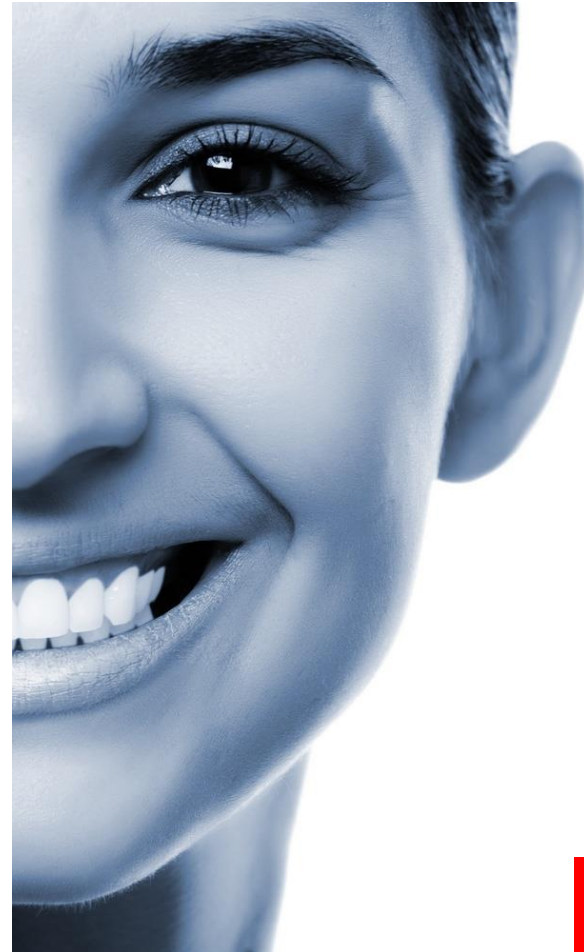
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Inquiry

Factsheet: IC Market-Tracking® Pipe Fittings in Europe 2018

Outline

- Interactive PDF, approx. 100 pages
- Excel Pivot Table
- Optional: Colour printing


Prices

- Price per country from 2.360 €
- All Countries from: 11.490 €
- Colour print option: 150 €

You may find special deals and offers as well as subscription prices on the order form and with the interactive calculator.



Ordering options – Fax: +43 1 5854623 30

- click on  „Buy Now!“ and order to configure with the interactive price calculator
- Fill and print out the order form (the final two pages of the Full-Details-Documents)

Content of the Market Report

Basis of the Study

Language of the Study

English, German on Request

Introduction, Market Structure and Executive Summary

Definition and limits of product groups, as well as a summary of the results

Market Drivers

Summary of the most important market driving factors on the market

Overall Market and Forecast

Market development by quantity and in value in various segments of the market for the upcoming three years

Competition Analysis

Detailed market shares of leading companies from several sectors over the previous few years.

Market Structure

Countries/Regions

Germany, France, Benelux, Italy, Poland, UK

Connection Method

Compression, Push, Press Fittings, Other Fittings

Fittings Material

Metal, Plastic, Multilayer

Methodology

Methodology and Data Sources

The study is based off of information from the most important manufacturers within the branch.

All information is checked for plausibility and evaluated by means of additional sources of information and identified within the tables.

The market models and forecasts are based on economic indicator models that are developed individually for each market. The influencing factors are analysed by a variety of regression analysis models and are updated yearly.

Influencing factors are results of secondary research by the most prestigious statistical institutes and are supplemented by internal market analysis.