



IC Market Tracking
Sanitary Pipes in Europe
2018

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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
 - Application Type
 - Pipe Material
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.



Sanitary Pipes Europe Top 6

ITA POL Benelux FRA UK GER

Market by

Surface Heating & Cooling Radiator Connections Hot & Cold Water Installations

PVC
Metal
Multi Layer

PVC
Metal
Multi Layer

PVC
Metal
Multi Layer

Plastic Pipe Material*

Crosslinked Polyethylene (PEX)
Polyethylene of Raised Temperature Resistance (PE-RT)
Polybutylene (PB)
Propylene Random Copolymer (PP-R)

Metal Pipe Material*

Stainless Steel
Steel
Copper

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.

Definition and Demarcation

Application Type

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

Surface Heating & Cooling Pipes

A heat-transfer device consisting of a sealed metal tube with an inner lining of wick like capillary material and a small amount of fluid in a partial vacuum; heat is absorbed at one end by vaporization of the fluid and is released at the other end by condensation of the vapor.

Radiator Connection Pipes

Pipes designed to connect radiator(s) to the heating source.

Hot & Cold Water Installation Pipes

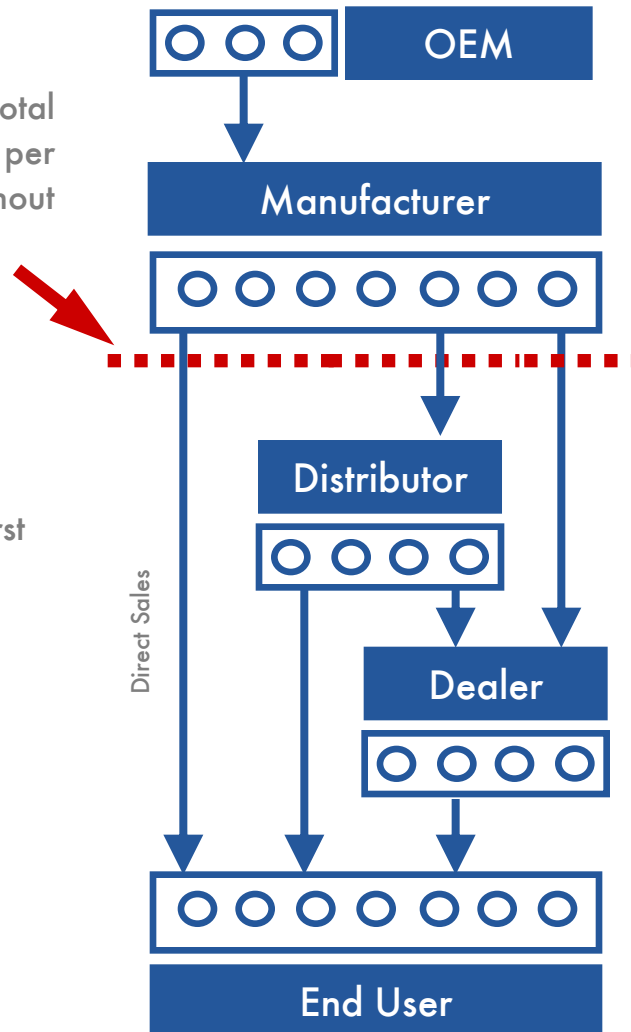
Pipes that carry pressurized and treated fresh water inside the buildings.

Infrastructure pipes 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.



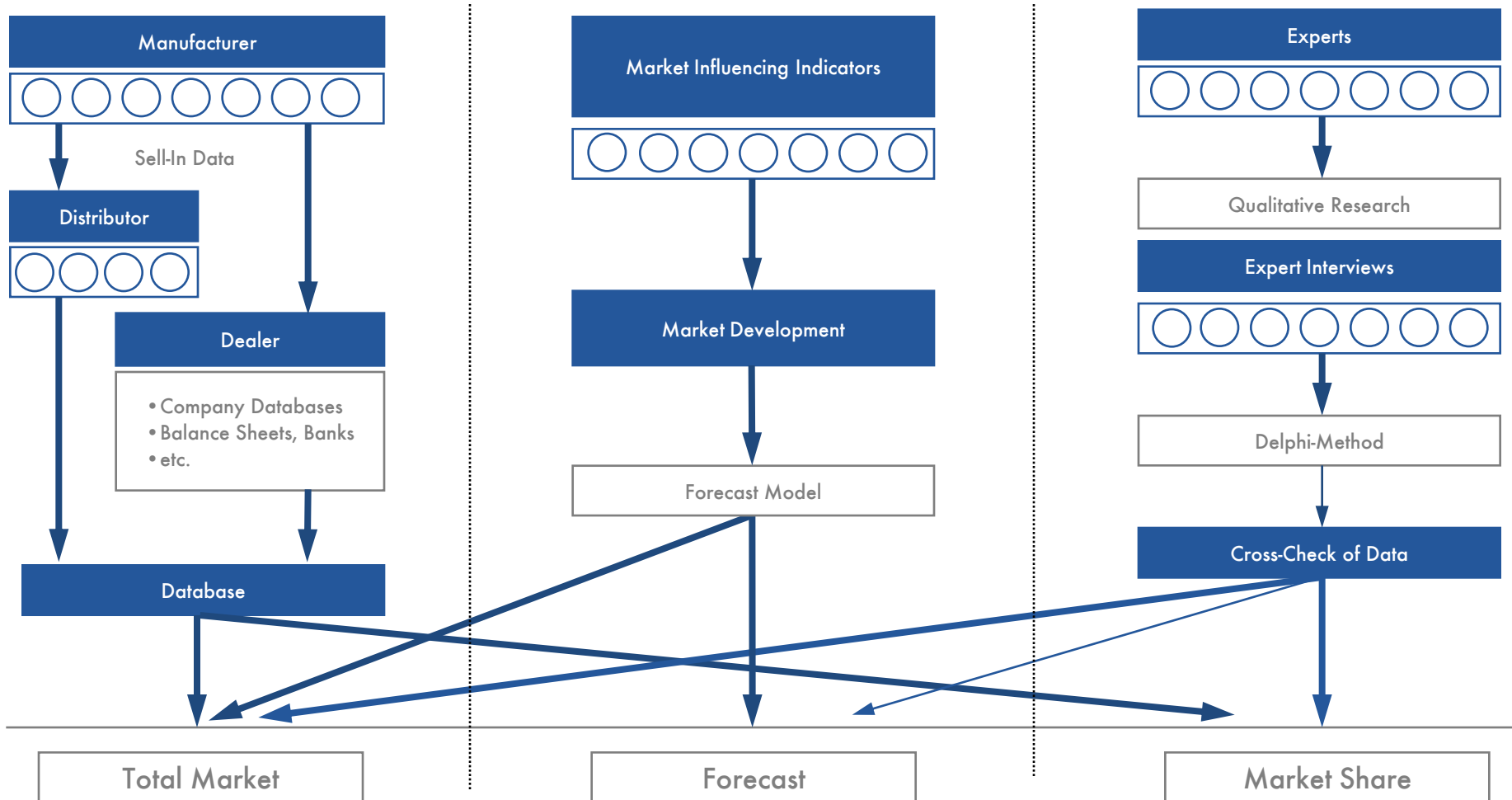
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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?

Description Structure of Survey Methodology

Methodology



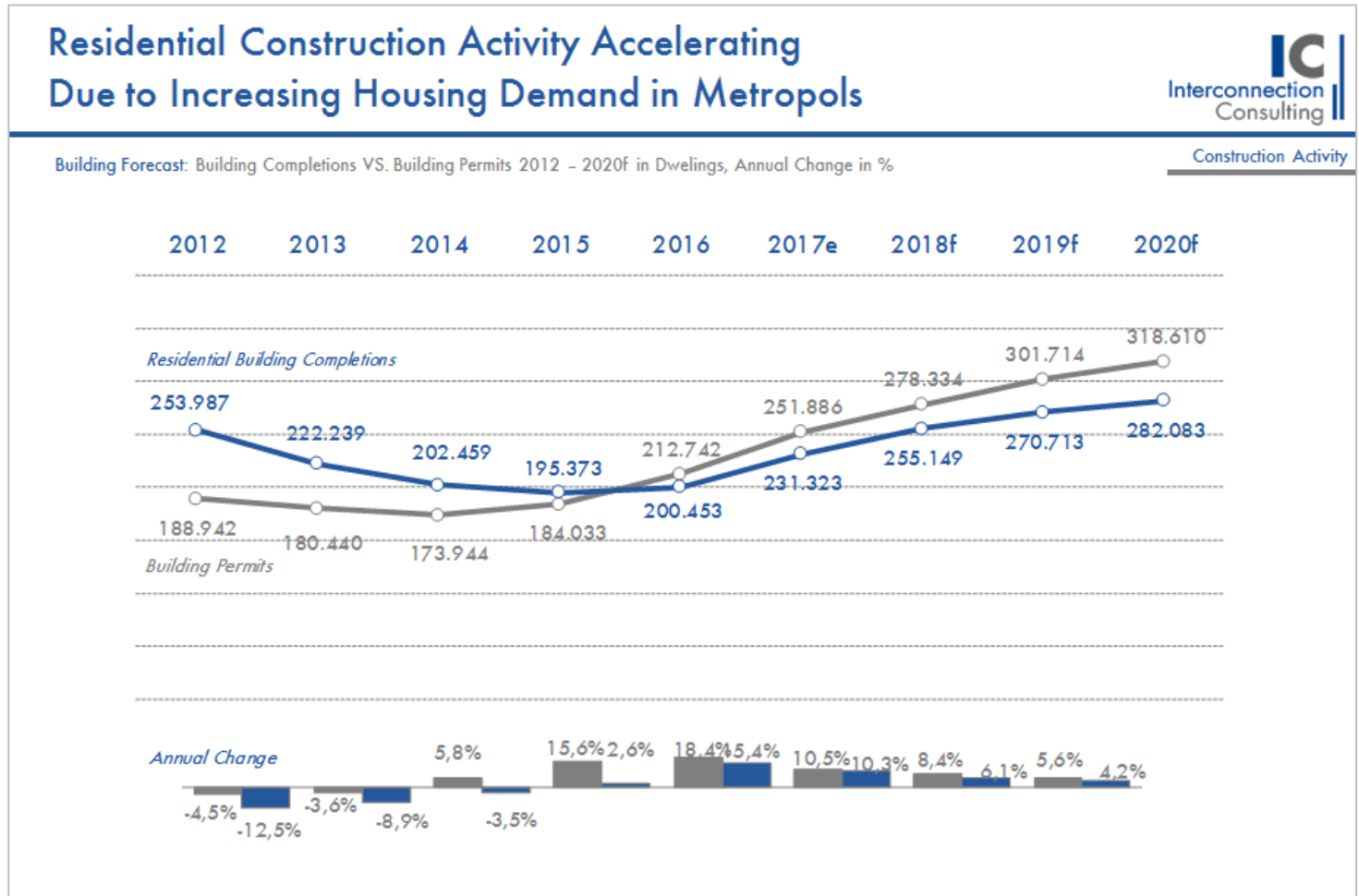
Contents of the IC Market Tracking®

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.

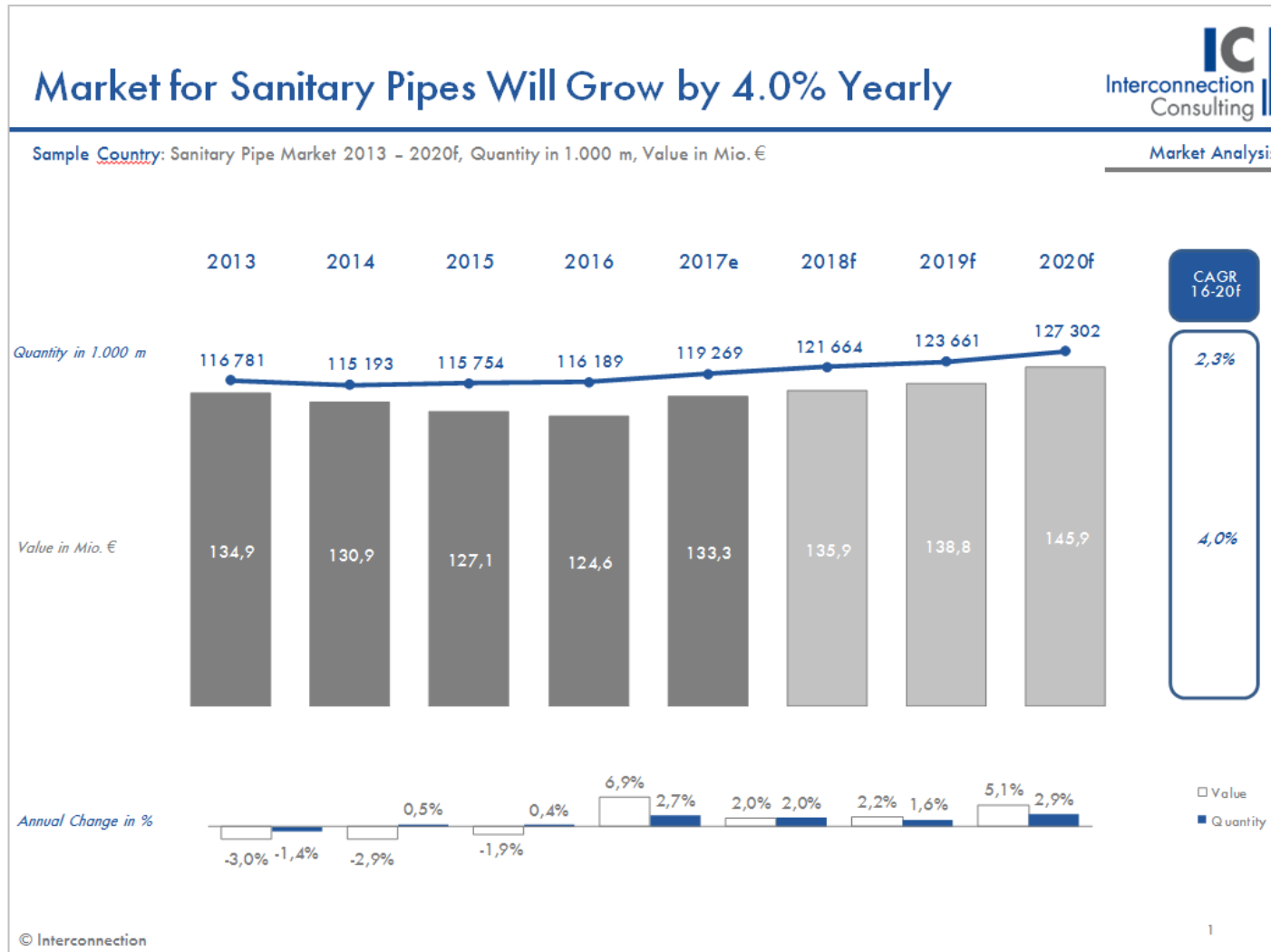
Market Environment Data of our Forecasting Model

- 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

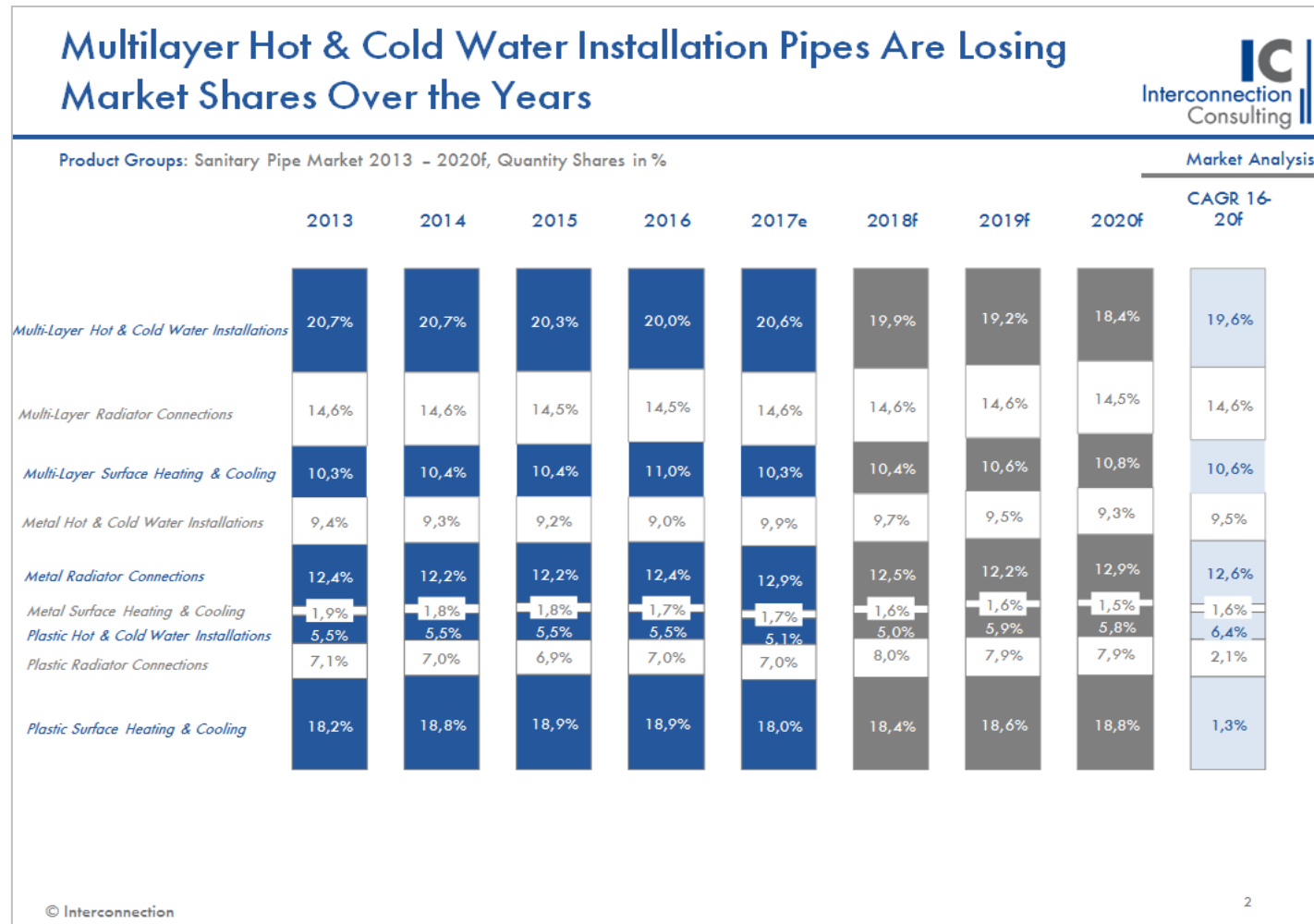


Total Market Development and Forecast

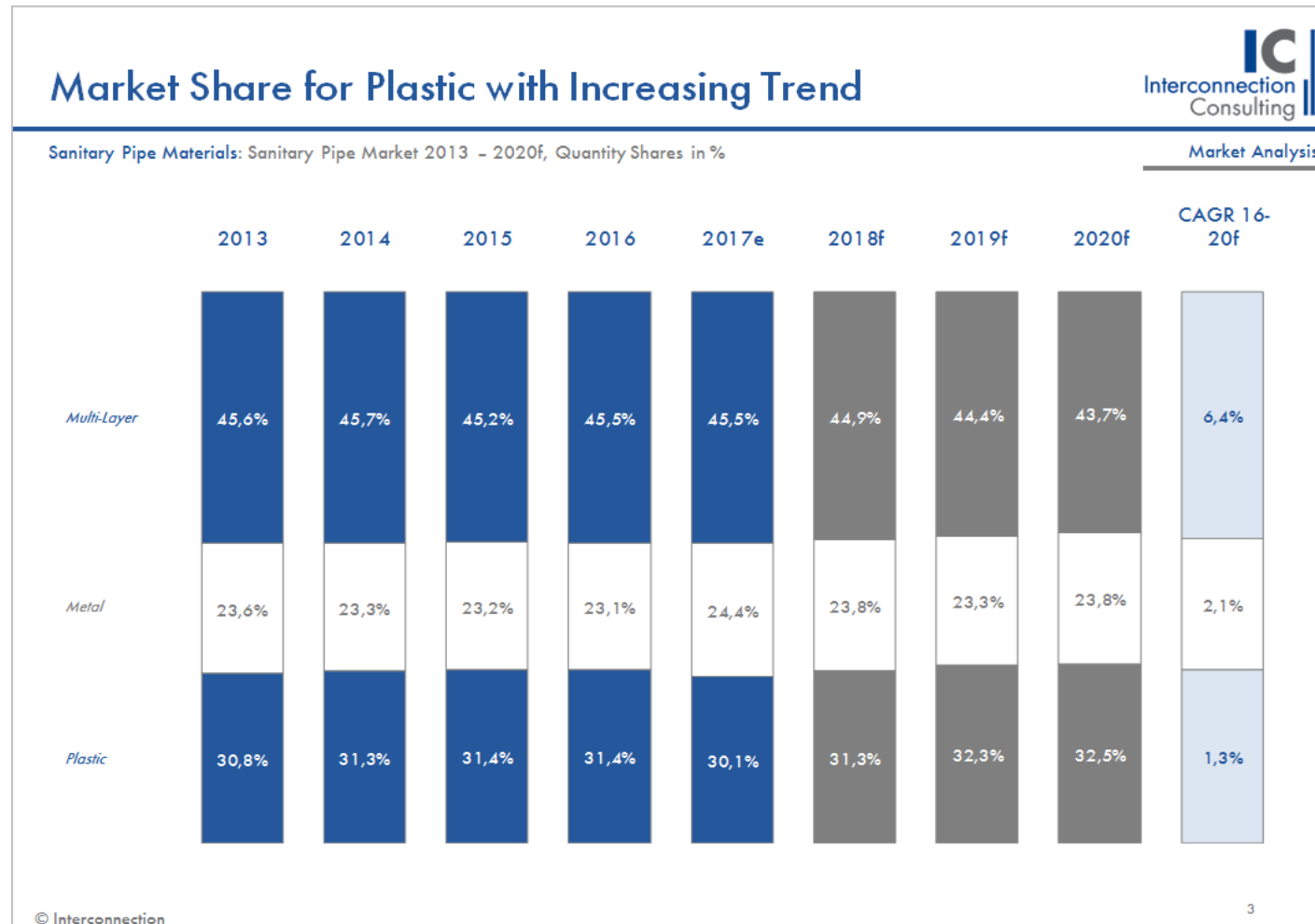
- Overview of the total market until the current year and forecast for the upcoming three years.
- This chart shows sample figures



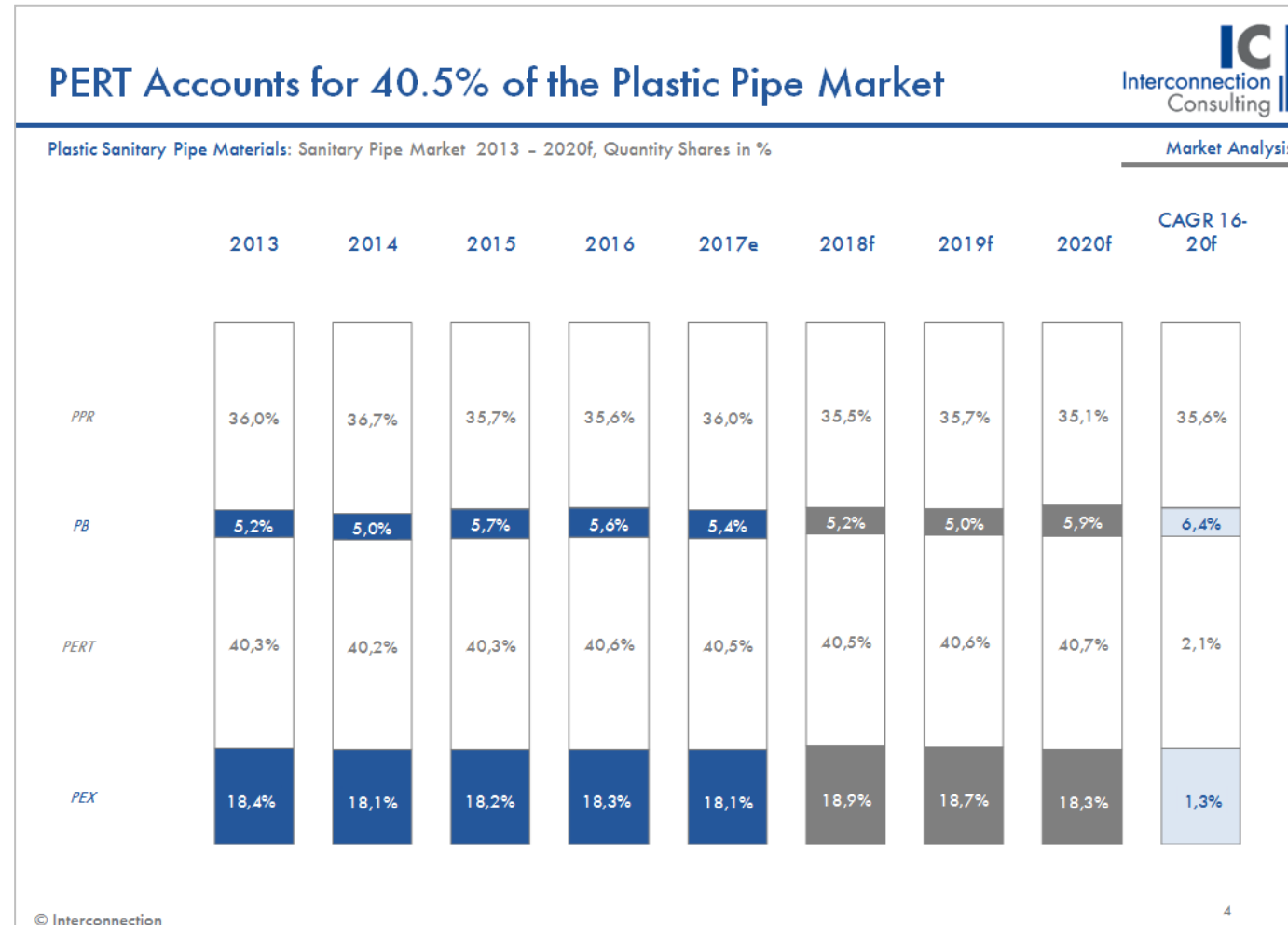
- Overview of the Product Group Segmentation, Materials, Application as well as a Forecast for the upcoming three years about their development.
- *This chart shows sample figures.*



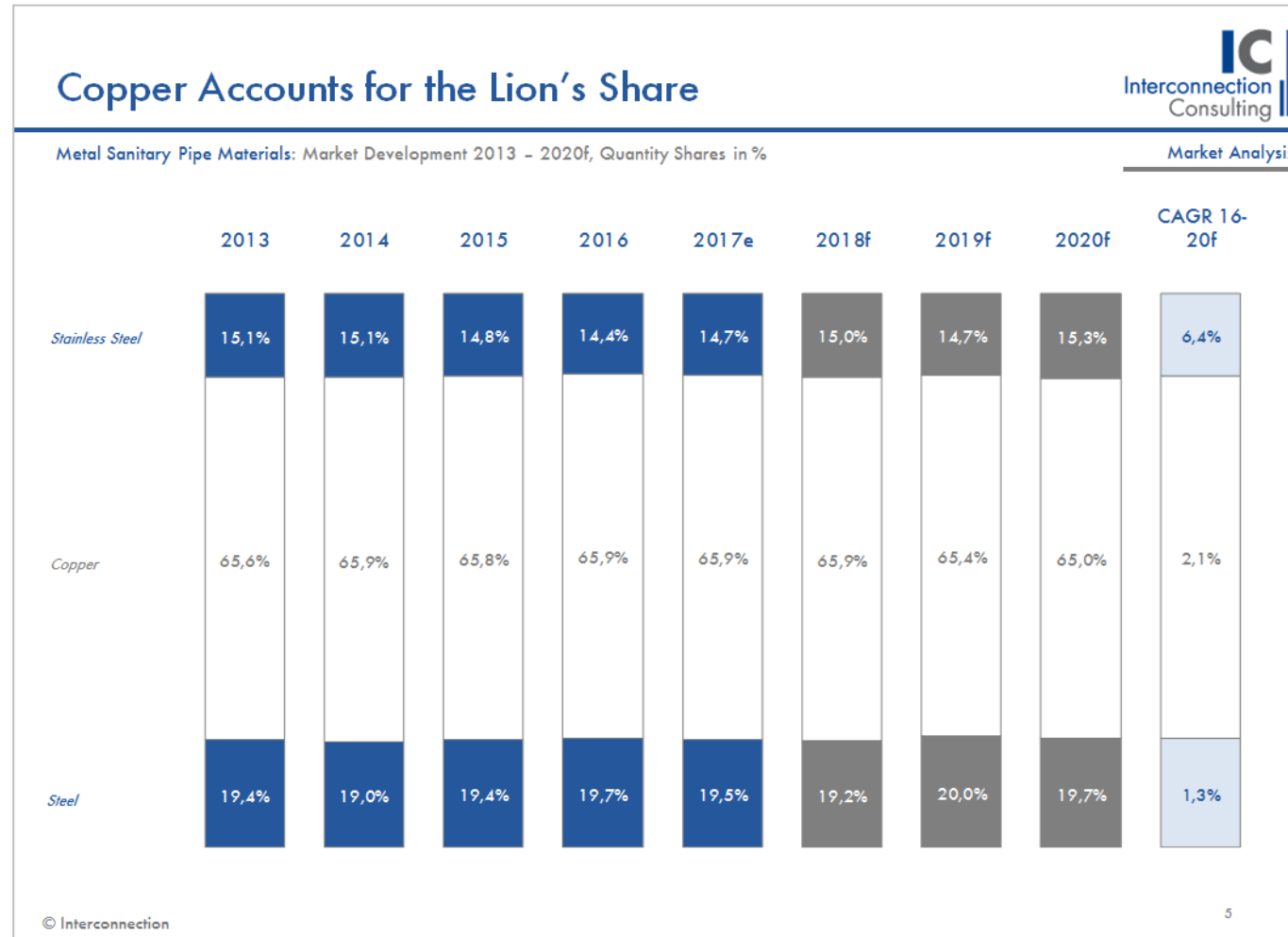
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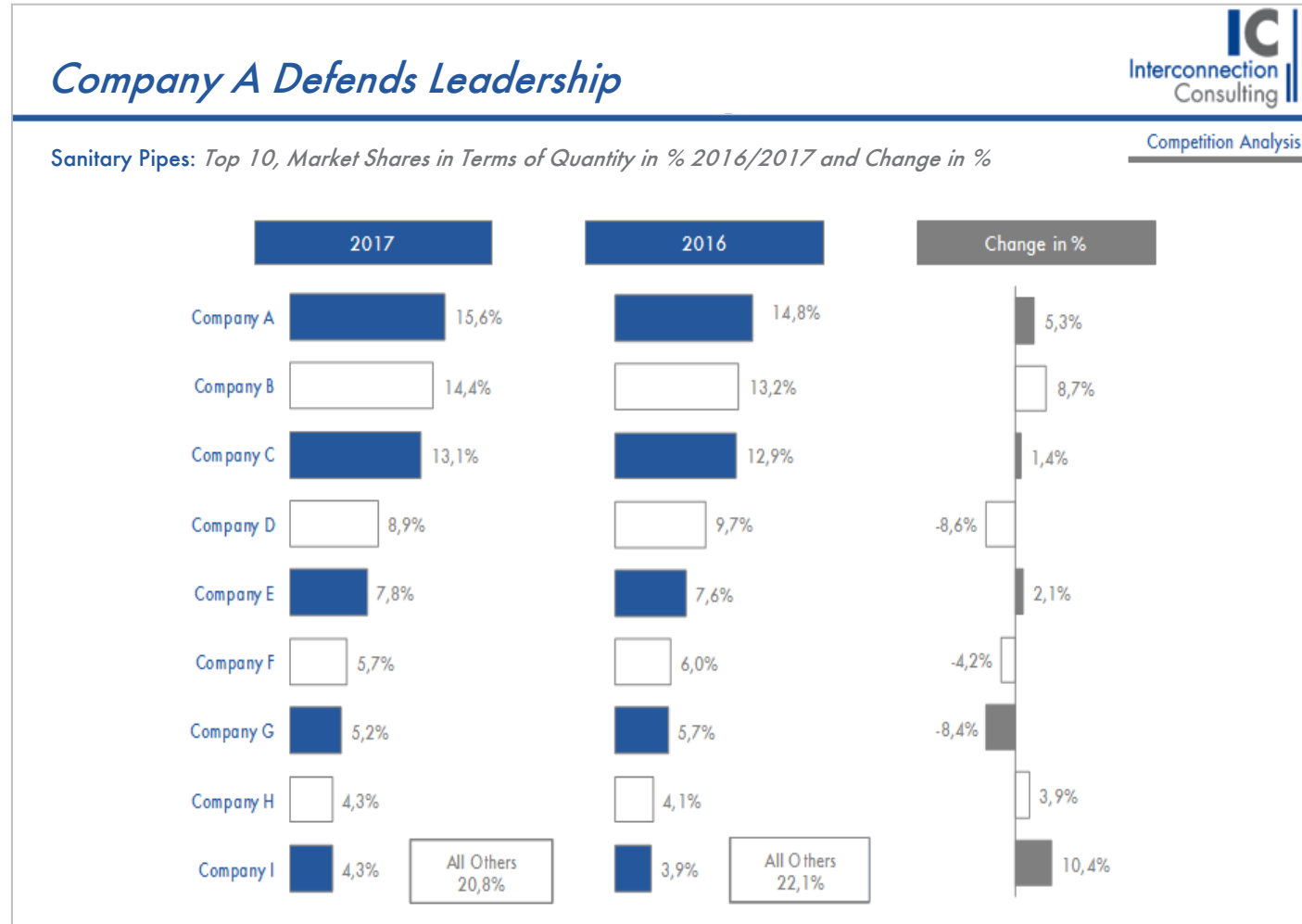


- Overview of the Product Group Segmentation, Materials, Application as well as a Forecast for the upcoming three years about their development.
- *This chart shows sample figures.*



Competition Analysis and Market Shares

- Market Shares of the Top 10 market leaders.
- 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)
∅ 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[®] Sanitary Pipes in Europe 2018

	Single Issue	IC Subscription *	Scale of Discounts	
Europe Total **	€ 11.490,-		€ 5.000	- 10%
Single Country	€ 2.950,-		€ 7.500	-20%
			€ 10.000	-25%
			€ 15.000	-33%
			€ 20.000	-40%

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** Price taking into account the scale of discount
Price includes an interactive PDF Document. All prices shown exclude sales tax

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- 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 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 of ours and provides helpful data for decisions.“

Mr. Bernd Blümmers

Directeur General, Saint-Gobain Solar Systems, Central Europe, Aachen

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

Interconnection Consulting

Getreidemarkt 1, A-1060 Wien

Laszlo Barla, MA – Market Analyst

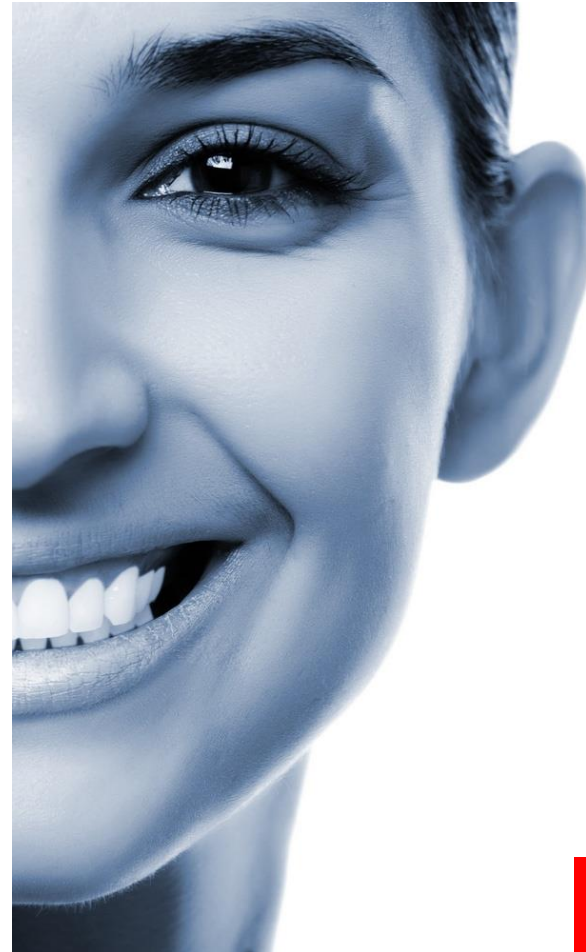
Tel: +431 585 4623 - 68

Fax: +43 1 585 4623 -30

barla@interconnectionconsulting.com

Interconnection Consulting
Vienna • Bratislava • Lviv • Buenos Aires • Oberstdorf

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Inquiry

Factsheet: IC Market Tracking® Sanitary Pipes in Europe 2018

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 90 per country
- Optional: Hard Copy

Price

- per country: 2.950 €
- all countries: 11.490 €
- Hard Copy: 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.



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: main economic indicators.

Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, energy, business segments and Distribution Channels.

Competition 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, France, Benelux, UK, Italy, Poland

Application Type

Surface Heating & Cooling, Radiator Connection pipes, Hot and Cold Water Installation pipes.

Pipe Material

Metal, Plastic, Multi Layer.

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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