

IC Market-Tracking®

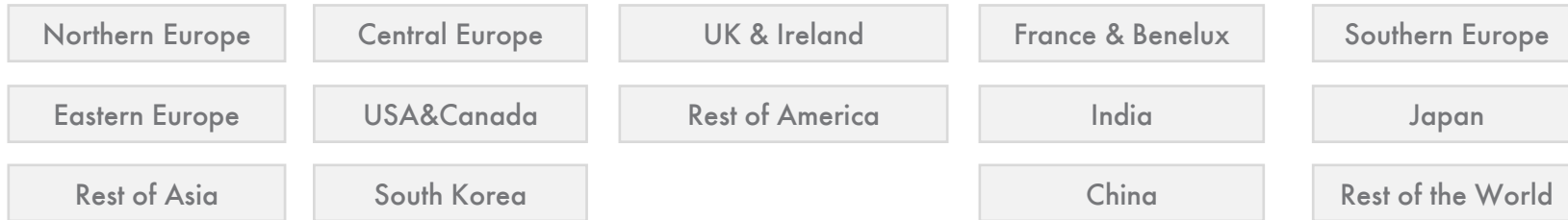
Glass Machinery  
Worldwide 2018

[www.interconnectionconsulting.com](http://www.interconnectionconsulting.com)

# 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.
- ✓ 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
  - Customer Segments
  - Distribution Channels
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic representation, interactive charts and tables which allow rapid application and utilization of the provided data.





## Product Groups

Flat Glass

Container Glass

Specialty Glass

Glass Fiber

Others

## Machine Groups

Glass Producing Machines

Glass Processing Machines

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

# Definition and Demarcation

## Product Groups

### Flat Glass

Used as sheet and float glass for residential and commercial construction, automotive applications, tabletops and mirrors.

### Container Glass

Used as hollow glass for the packaging of food, beverages, household chemicals, pharmaceuticals, cosmetics, etc.

### Specialty Glass

Used as pressed and blown glass for tableware, cookware, lighting, television, liquid crystal displays, laboratory equipment, optical communications, etc. As well as Glass for the Photovoltaics Industry.

### Glass Fiber

The long and thin Fibers can be processed into a lot of different products. They are used for data transfer, in the medical area and measurement engineering, for lighting purposes, for aerospace, for the automobile industry, etc.

### Others

Other types of Glass Products, like Glass building blocks, Sol-Gel glass, etc.



## Machine Groups

### Producing Machinery

IS Machinery, Rotary machinery and conveyor belt machinery are used for the production of Hollow Glass. Glass melts and Annealing Lehrs are needed for the Float Glass Production. Glass melts are needed as well, for the Production of Fiber Glass.

### Processing Machinery

Include all types of Machinery which are used for the processing of Glass such as Cutting Machinery, Drilling Machinery, Washing Machinery, Sandblasting Machinery etc.

## Abbreviations

### CAGR

Compound annual growth rate: 2013-2020

### Avg. Share

Average Share: 2016-2020

### 2017e/2018f

Estimated/Forecasted

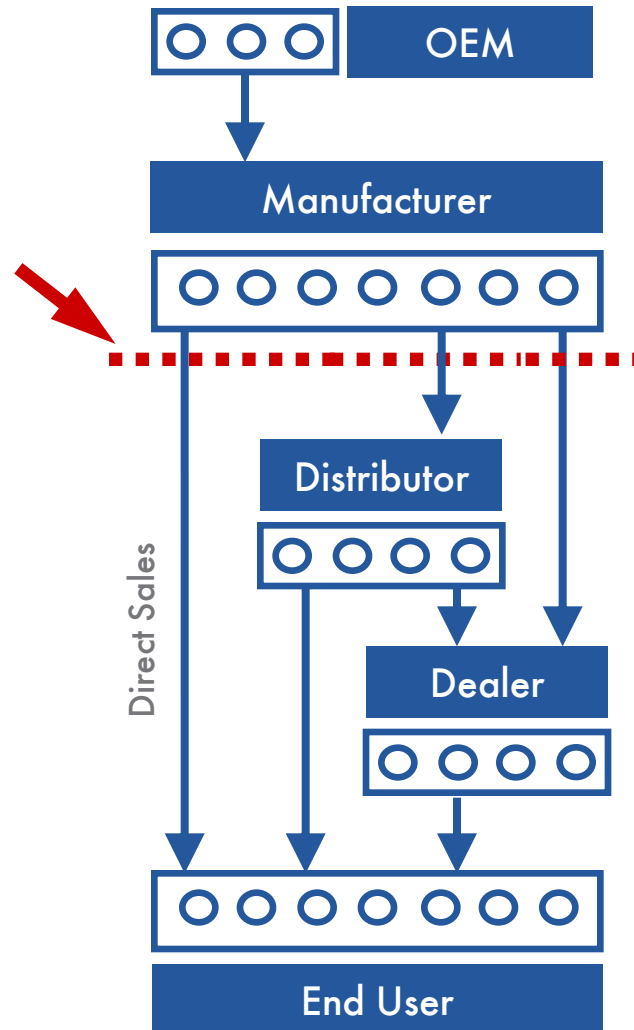
# Definition and Demarcation

Regions		
US & Canada	Northern Europe	Norway, Sweden, Finland, Denmark, Iceland
India	Central Europe	Austria, Germany, Switzerland
China	UK & Ireland	England, Scotland, Wales, Ireland
Japan	France & Benelux	France, Belgium, Netherland, Luxembourg
South Korea	Southern Europe	Spain, Portugal, Greece, Italy
	Eastern Europe	Poland, Hungary, Czech Republic, Slovenia, Slovakia, Baltic Countries, Balkan Countries, Belarus, Russia, Ukraine, excluding Turkey
	Rest of Asia	Asia excl. India, China, Japan & South Korea, incl. Turkey
	Rest of America	North and South America excl. USA & Canada

# 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.



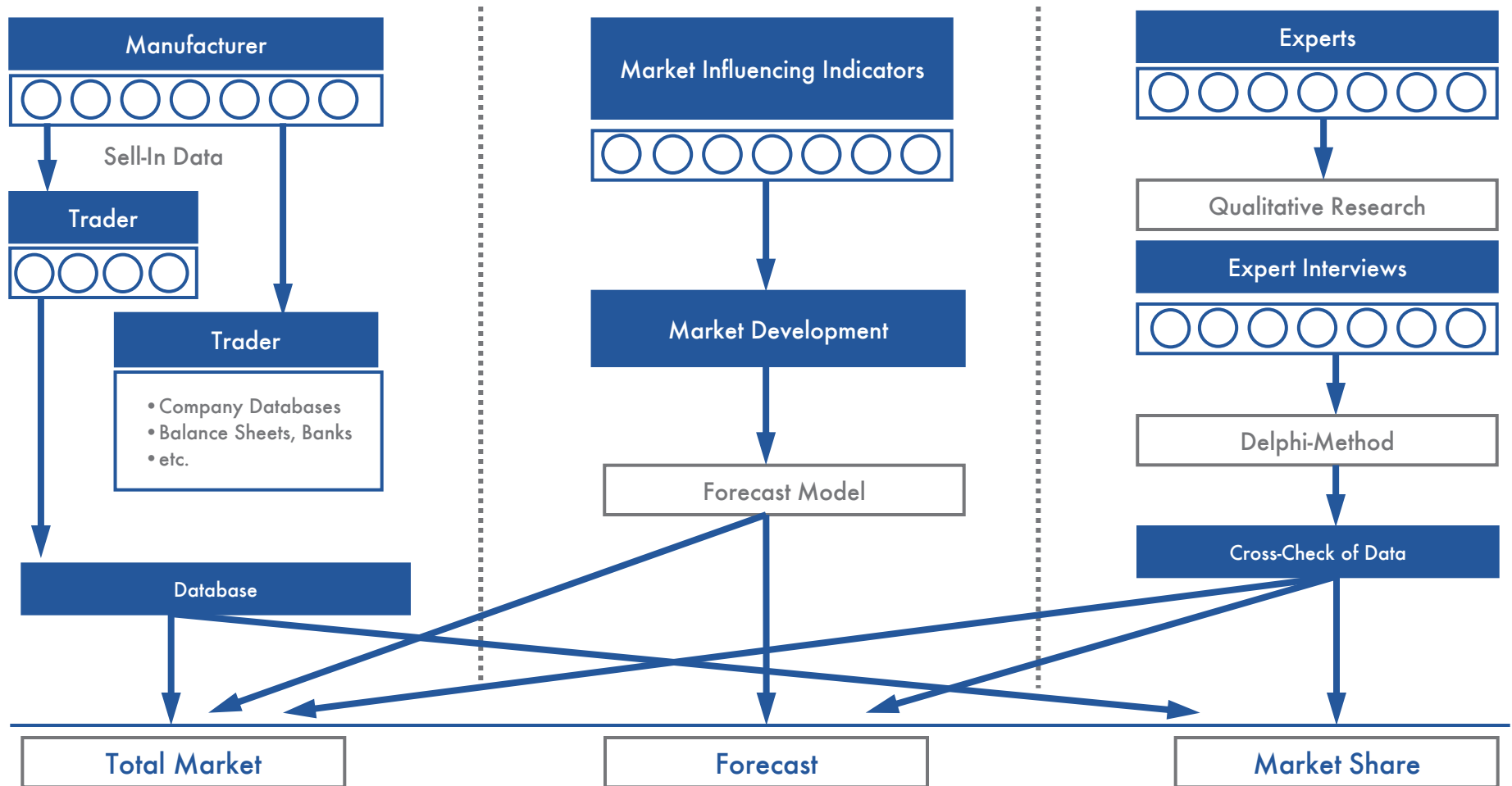
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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?

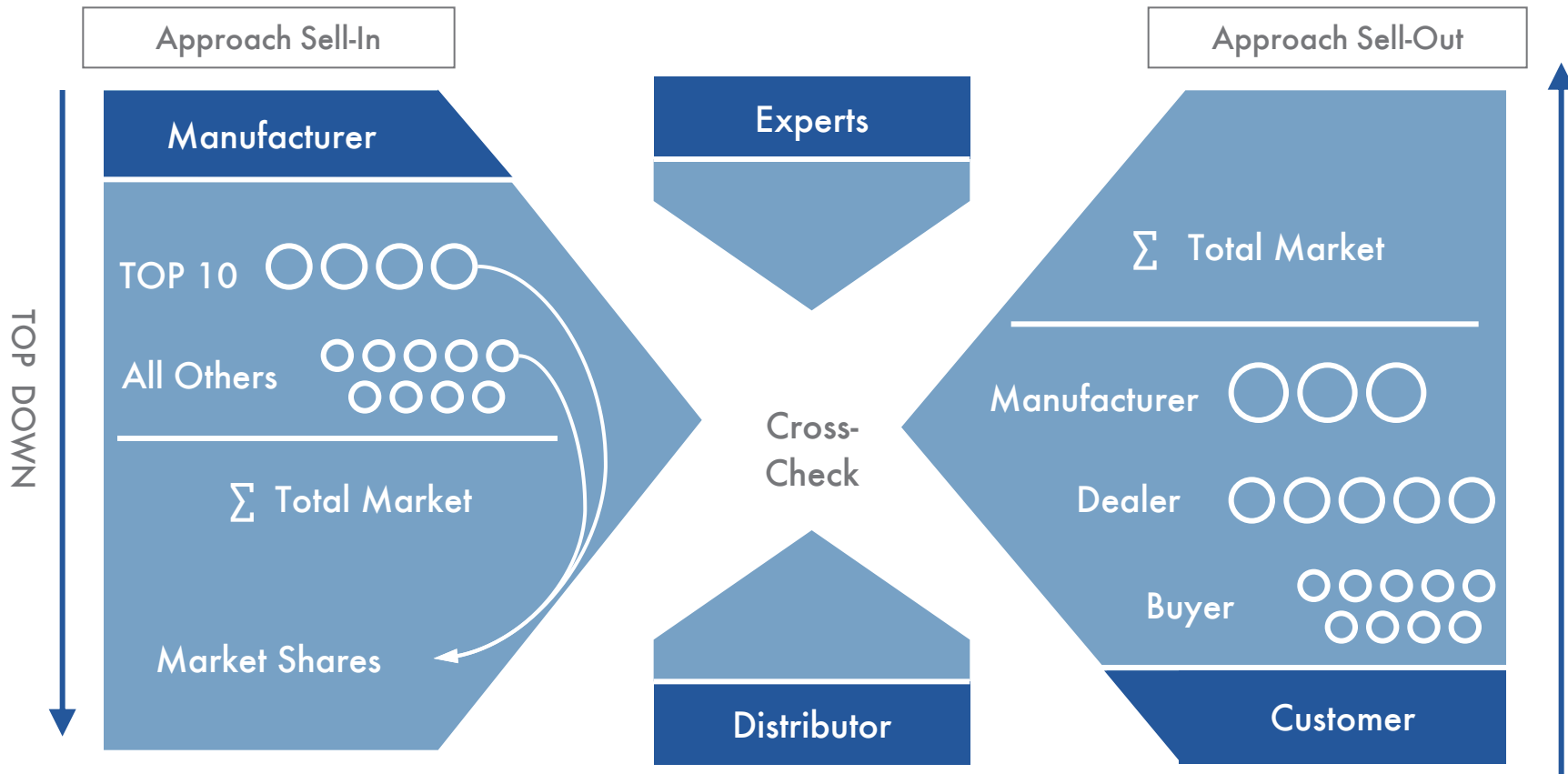
Description Structure of Survey Methodology

Methodology





# How Do We Cross Check the Data?

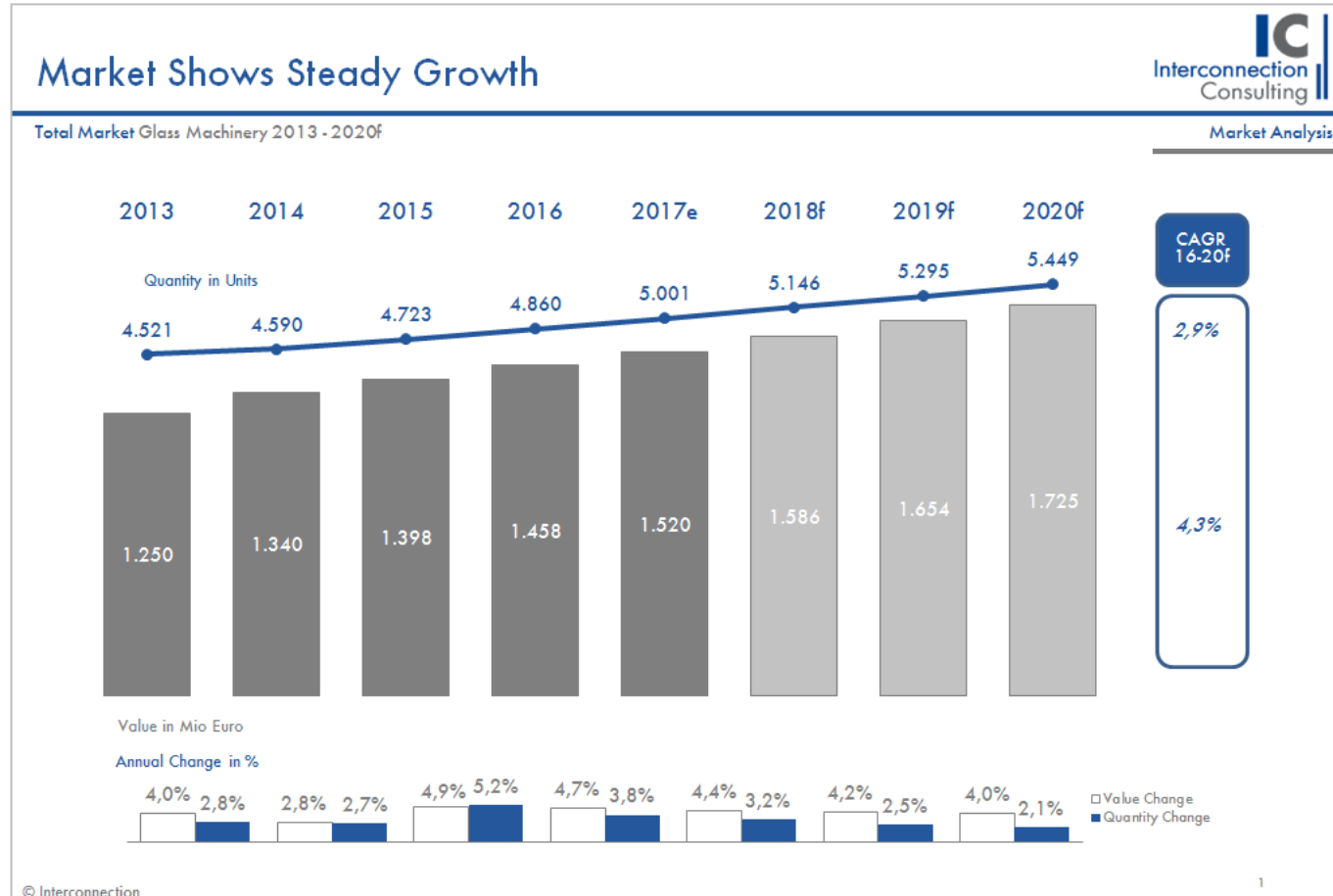


*The IC Market Tracking® is modularly built and consists of the following sections:*

- 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.

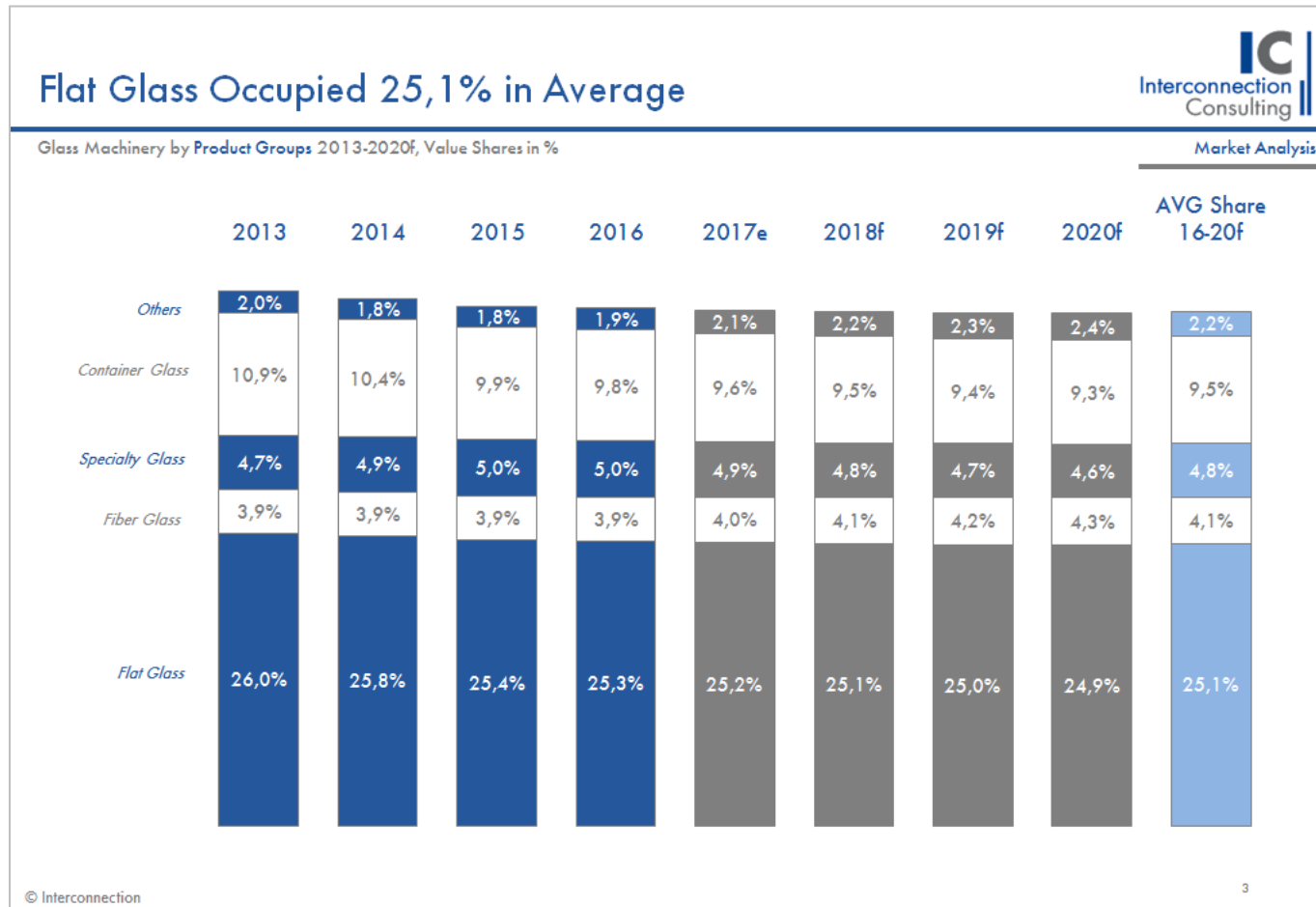
# What Is the Total Market Development?

- Overview of the total Market until the current year and Forecast for the upcoming three years.
- *This chart shows dummy figures.*

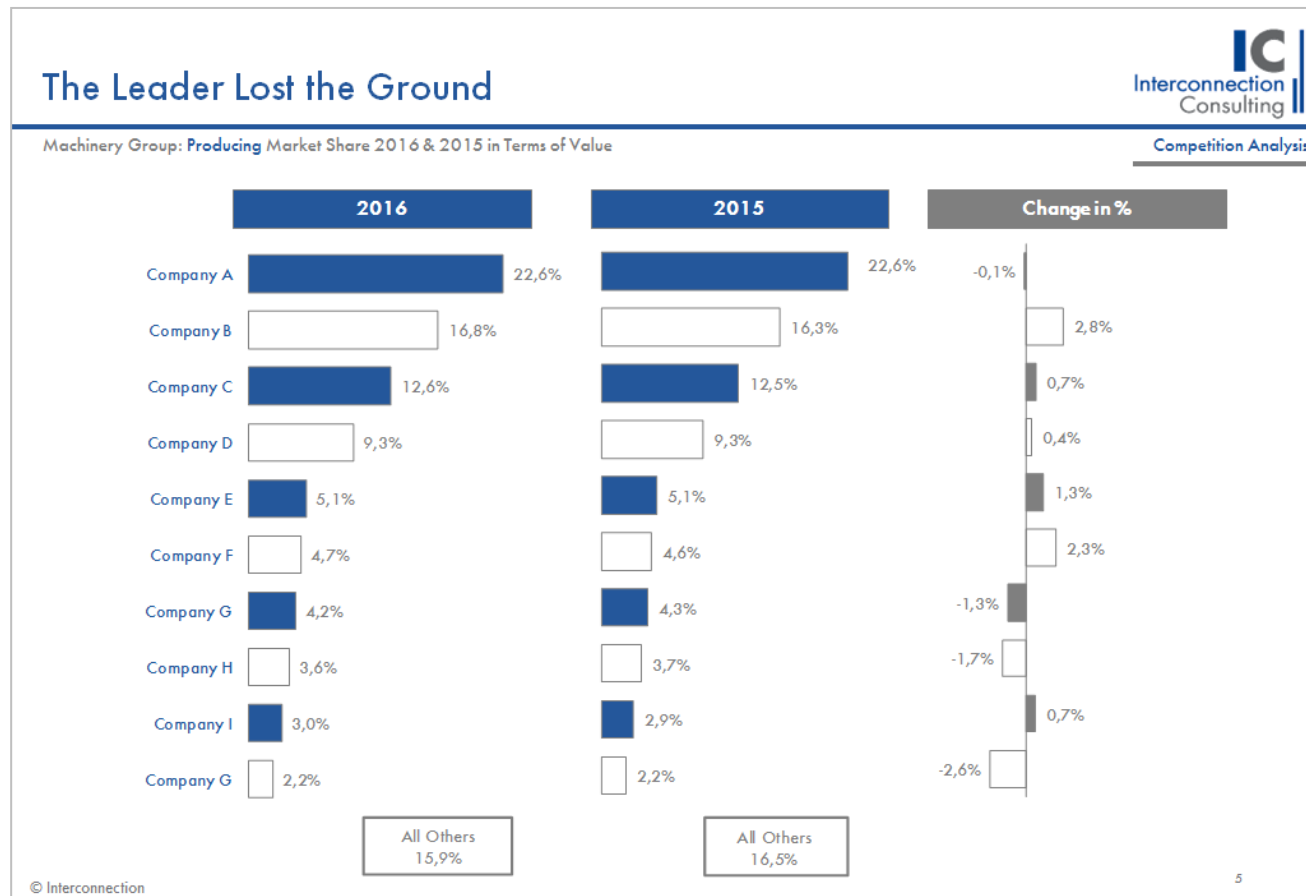


# Which Product Groups Will Be Profitable?

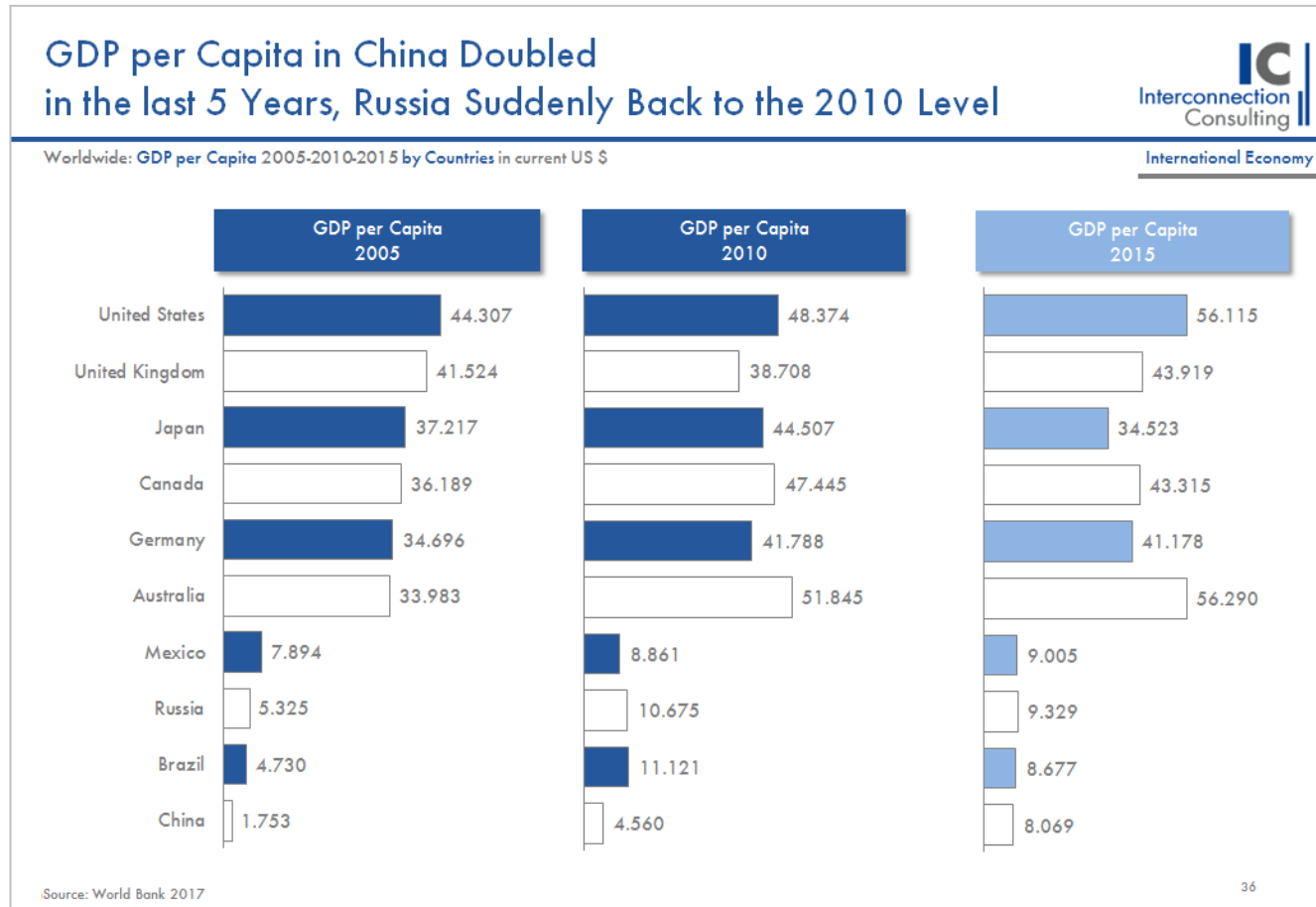
- Overview of the Segmentation by Machine and Product Groups.
- *This chart shows dummy figures.*



- Competition Analysis contains the detailed description of the most important companies in the examined market by reference to Market Shares, Changes, BCG-Portfolios, etc.
- *This chart shows sample 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.*



- 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	<b>A</b>
Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	
Segments	Results
<b>Segment A</b>	18.592
<b>Segment B</b>	8.434
<b>Segment C</b>	5.310
<b>Segment D</b>	3.290
<b>Segment E</b>	1.332
<b>Total</b>	<b>36.958</b>

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	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology			
Segments	<b>A</b>	<b>B</b>	<b>C</b>	
<b>Segment A</b>	3.290	5.452		7
<b>Segment B</b>	5.310	8.925		21
<b>Segment C</b>	8.434	10.794		
<b>Segment D</b>	18.592	14.624		13
<b>Segment E</b>	1.332	2.229		6
<b>Total</b>	<b>36.958</b>	<b>42.025</b>		<b>47</b>

	IC Subscription *	Single Issue
Total Market - America	€ 2,950.-	+25% for Single Issues
Total Market - Asia	€ 3,650.-	
Total Market - Europe	€ 5,950.-	
<b>Worldwide (Single License)</b>	<b>€ 8,662.50</b>	
<b>Worldwide (Group License **)</b>	<b>€12,487.50</b>	

In specific analyzed regions:

America: USA & Canada, Rest of Americas

Asia: China, India, Japan, Korea, Rest of Asia

Europe: Northern Europe, Central Europe, UK & Ireland, France & Benelux, Eastern Europe, Southern Europe

- 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.

\*\* Group license – report can be shared with subsidiaries/brands within a group.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.



# Interconnection Provides Data for Corporate Decisions



# Our Market-Intelligence Tools



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

**Interconnection Consulting**  
Getreidemarkt 1, A-1060 Wien

**Mariia Shvets – Market Analyst**

Tel: +38-0-32 2612411

Fax: +43 1 5854623 - 30

shvets@interconnectionconsulting.com

**Mag. Ernst Rumpeltes – Market Analyst**

Tel: +43 1 5854623 - 38

Fax: +43 1 5854623 - 30

rumpeltes@interconnectionconsulting.com

Interconnection Consulting | Vienna • Oberstdorf • Lviv • Bratislava

[www.interconnectionconsulting.com](http://www.interconnectionconsulting.com)



we show you the way