



IC Market Forecast
Sanitary Ceramics in
Europe 2019

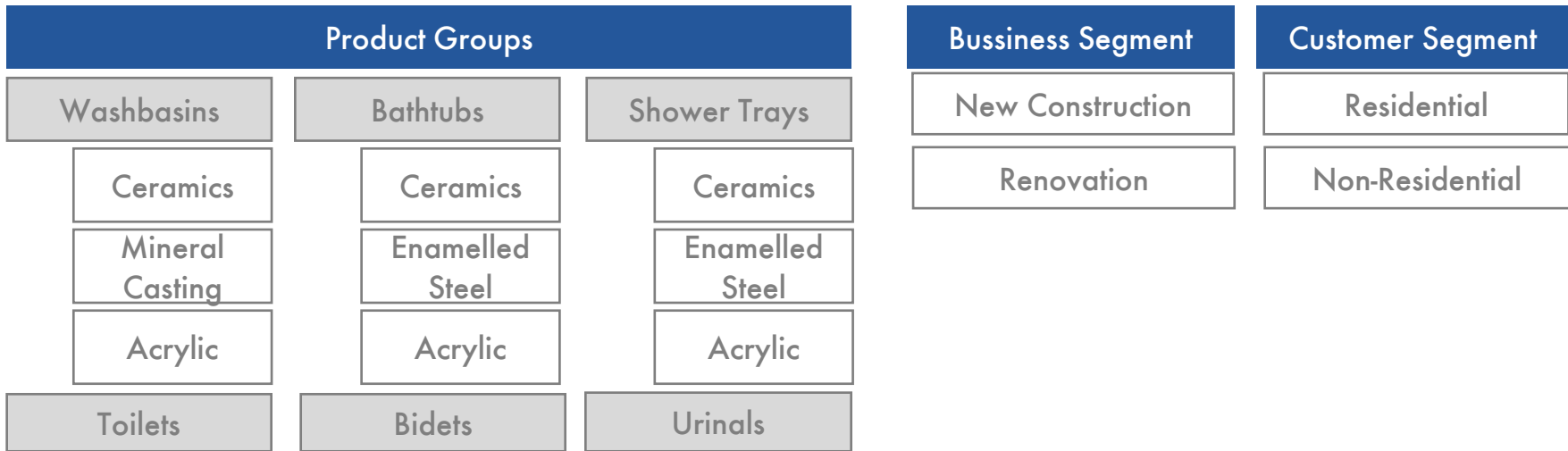
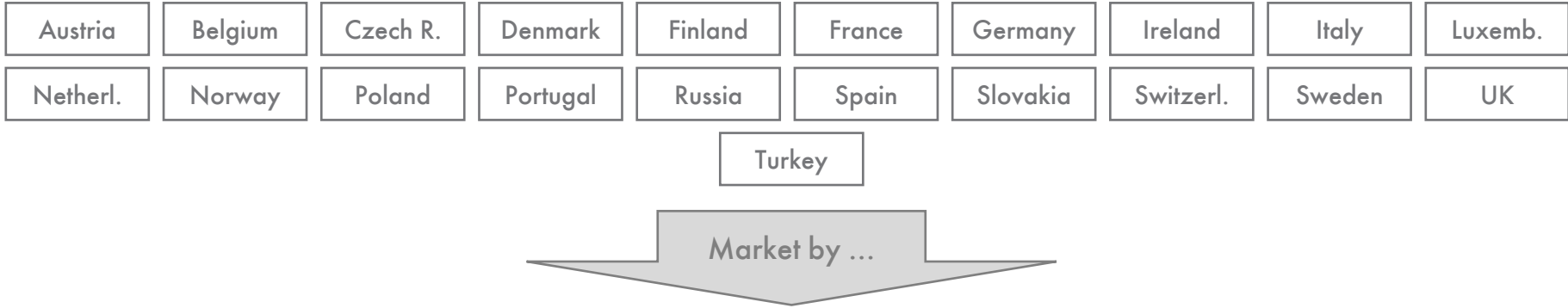
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Your Benefits at Glance

- ✓ 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.
- ✓ Assessment 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 Forecast® Sanitary Ceramics in Europe 2019



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 Groups

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

Washbasins

Classic Basin, Bucket Attachment, Pan Attachment,
Material: Sanitary Ceramics, Acrylic, Cast Mineral,
Mineral Steel...



Bathtubs

Detached, Rectangular, Oval, Round, Hexagonal,
Corner Bath, Space Saving Bath – and Special Bath.
Material: Mostly Steel enamel, ceramic and sanitary
acrylic



Shower Trays

Shower Tray, Material:
Acrylic, Ceramic or Steel
enamel



Toilets

Water Closet, Toilet, Usually Made of Ceramic



Bidets

Low Mounted Bidets. Is installed in addition to the Toilet in
the Bathroom. Material: usually made of Ceramic



Urinals

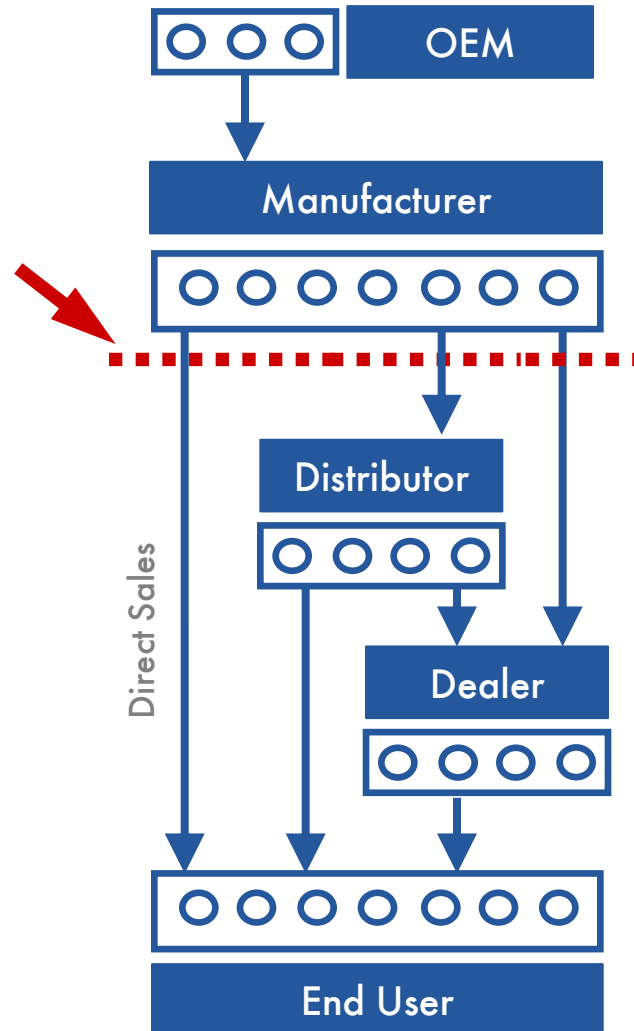
Device to urinate while standing, mostly intended for the
use of male persons. Material: usually made of ceramic



What Do We Measure?

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.



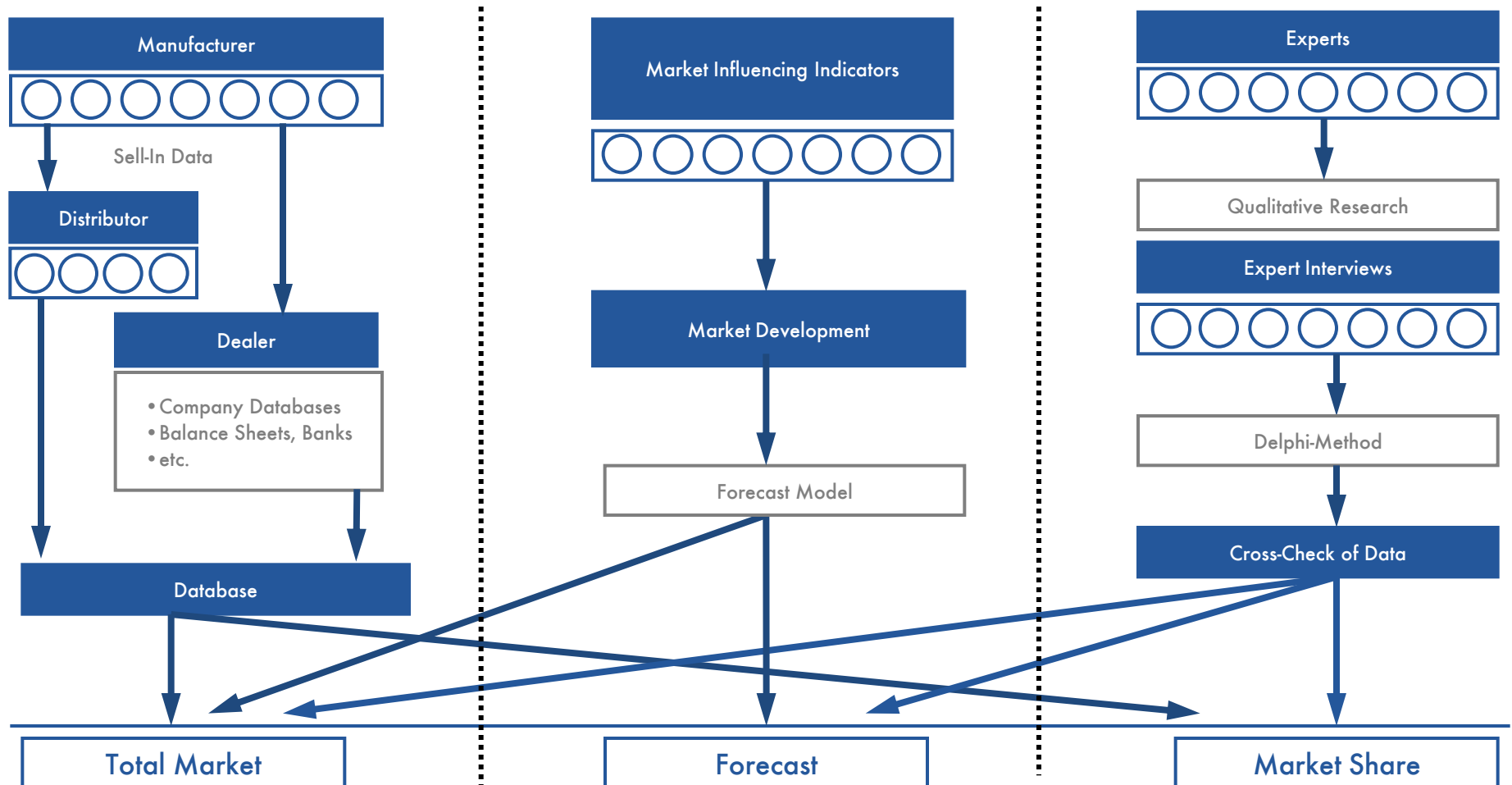
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

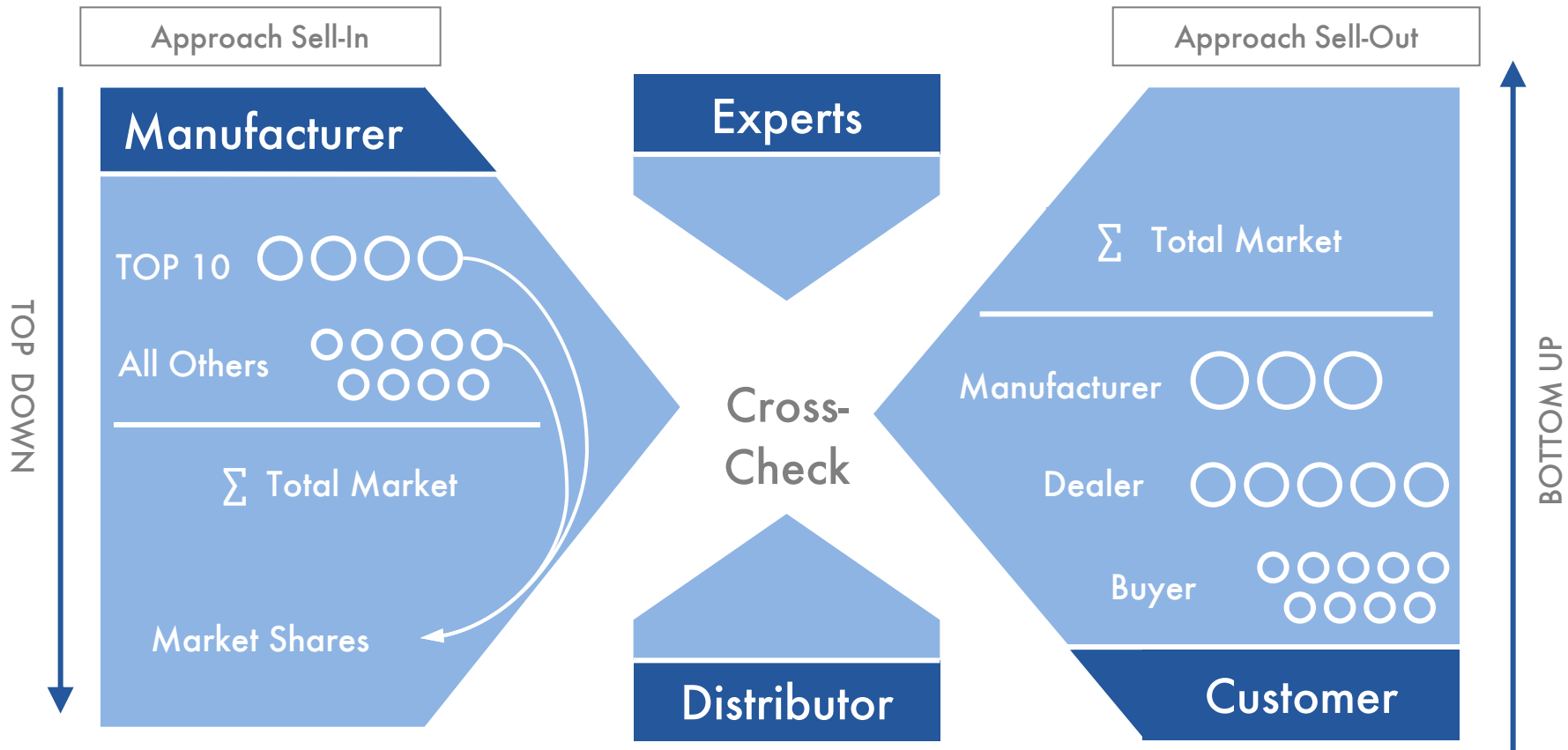
Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology

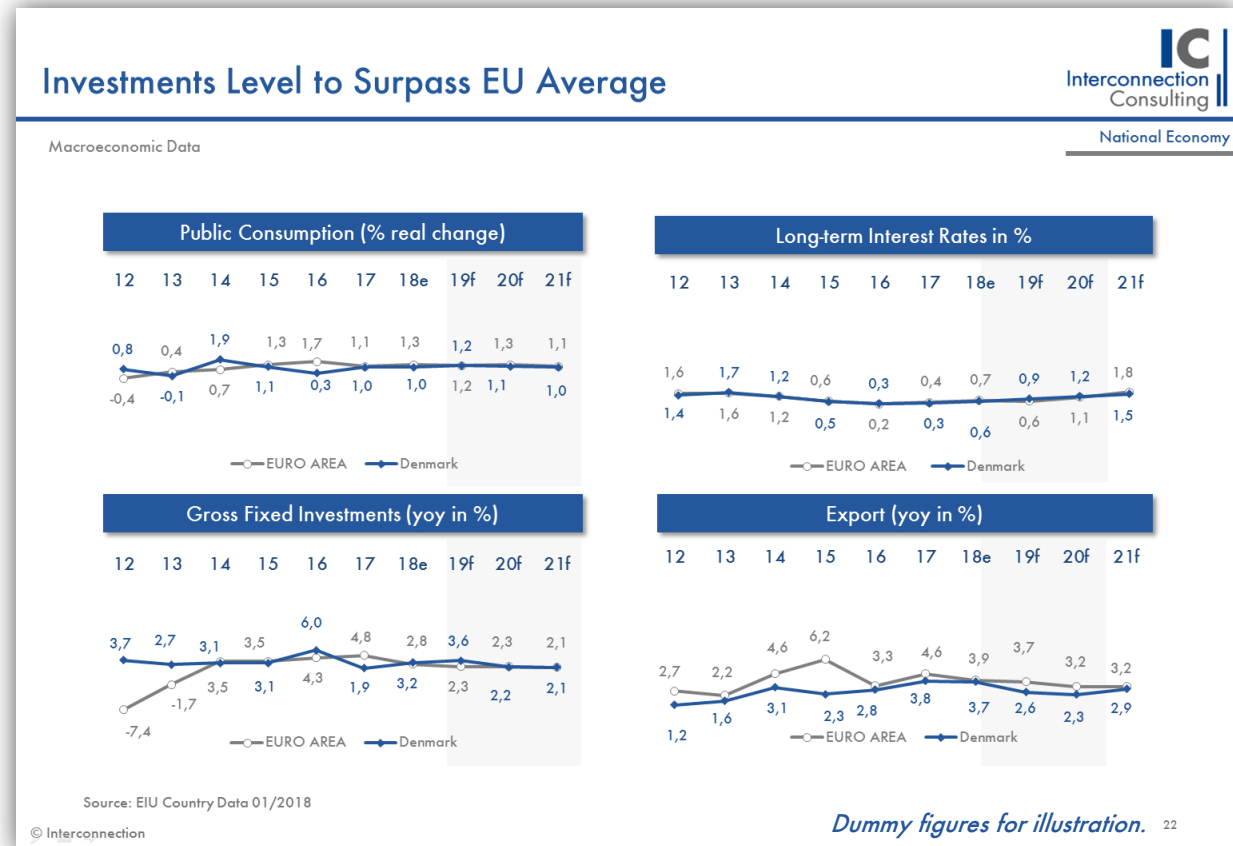


Contents of the IC Market Forecast®

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

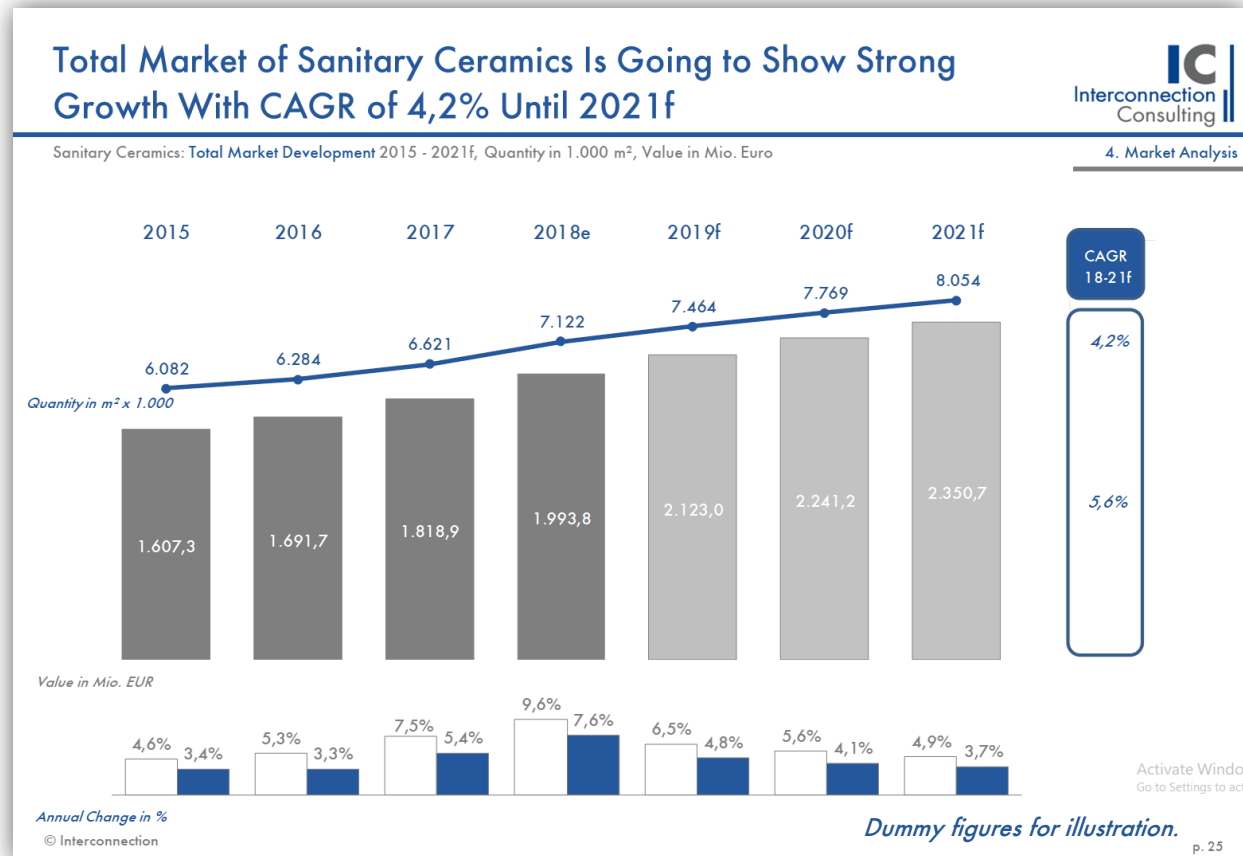
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analysed in the **Economic Environment**: You will find the most important data on 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.
- 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.

- Overview of the development of relevant micro- and macro economical market influencing factors for the total European Area as well as for separately examined regions.
- This sample chart shows dummy figures.*

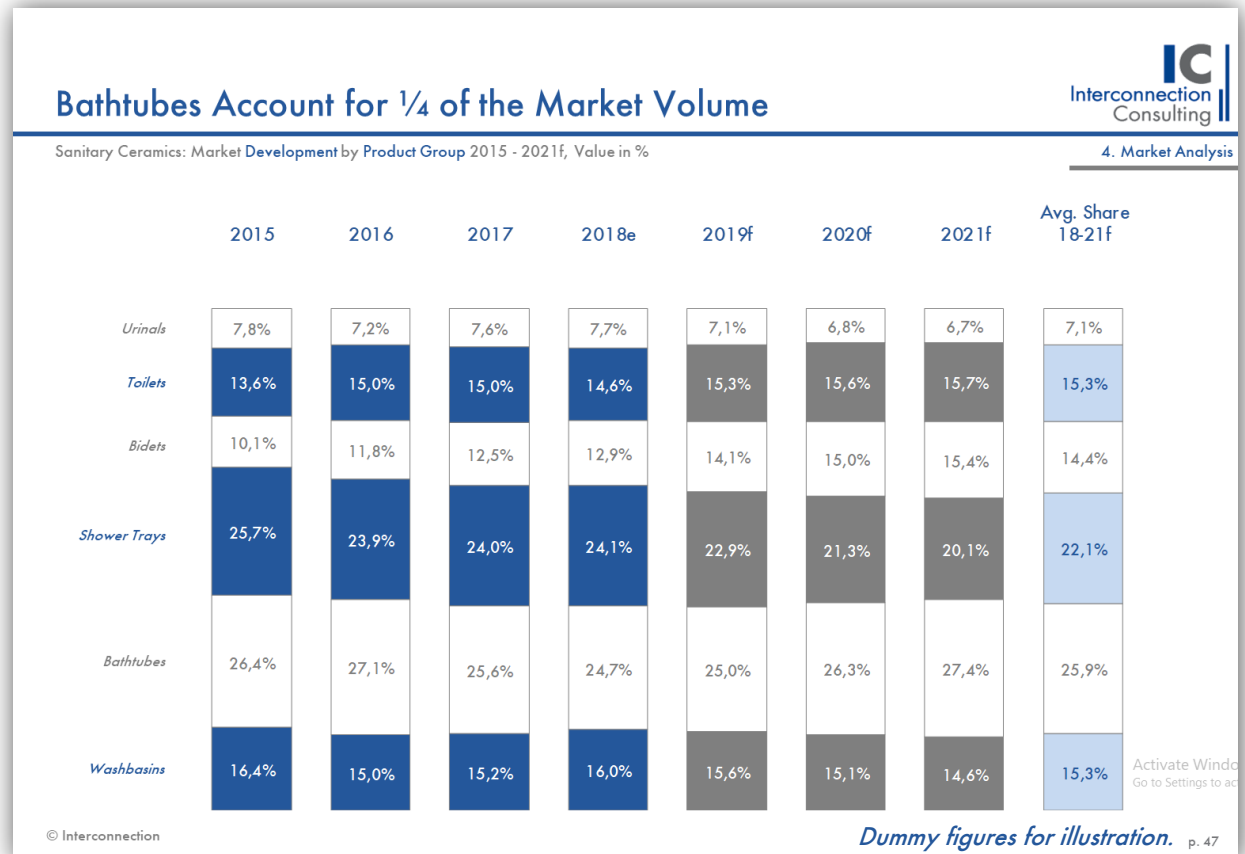


Total Market Development and Forecast

- Overview of the total market development in terms of value and quantity including forecasts for the next three years for all analyzed segments
- This chart shows dummy figures.*



- Overview of the distribution of material types, facade types, etc. as well as a forecast for the upcoming three years about their development.
- This sample chart shows dummy figures.*



- Additionally to the visualised report a Pivot Table will be included
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.

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 Forecast[®] Sanitary Ceramics in Europe 2019

	IC Subscription*	Single Issue	Scale of Discounts ab einem Kaufpreis von	
Single Country	€ 1,950.-	+25% for Single Issues	€ 5,000	-5%
Europe (excl. Russia)	€ 31,200.-		€ 10,000	-10%
Total (incl. Russia)	€ 32,760.-		€ 15,000	-15%
			€ 20,000	-20%

Available Countries	AUT	BEL	CZK	DEN	ESP	FIN	FRA	GER	IRL	ITA	
	LUX	NED	NOR	POL	POR	RUS	SWE	SUI	SVK	UK	TUR

* 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.

Selected References of Our Market Reports

„ IC is a constant tutor in the evaluation of markets and offers a helpful decision basis.“

Mr. Bernd Blümmers, Saint-Gobain Glass

AGC

 **PILKINGTON**


SAINT-GOBAIN


GUARDIAN
Glass • Automotive • Building Products

 **BASF**
We create chemistry

 **glaströsch**

SCHOTT
glass made of ideas



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Consulting – Strategy-Workshops

We support you deriving strategies and actions from the research results

Our Market-Intelligence Tools



For further questions,
please do not hesitate to contact us!

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