IC

Interconnection
Consulting

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IC Market-Forecast®

Sanitary Ware in Europe TOP 6 2015

Offer February 2016

IC Market Forecast® Sanitary Ware in Europe TOP 6

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.

✓ 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.

Market Structure

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IC-Market Tracking® Sanitary Ware in Europe TOP 6

Benelux	France	Germany	Italy	Spain	UK

Market by …

Product Groups

Washbasins	Bathtubs	Shower Trays
Ceramics	Ceramics	Ceramics
Mineral Casting	Enamelled Steel	Enamelled Steel
Acrylic	Acrylic	Acrylic

Toilets	Bidets	Urinals

Bussiness Segment

New Construction
Renovation

Customer Segment

Residential
Non-Residential

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

Definitions and Abbreviations

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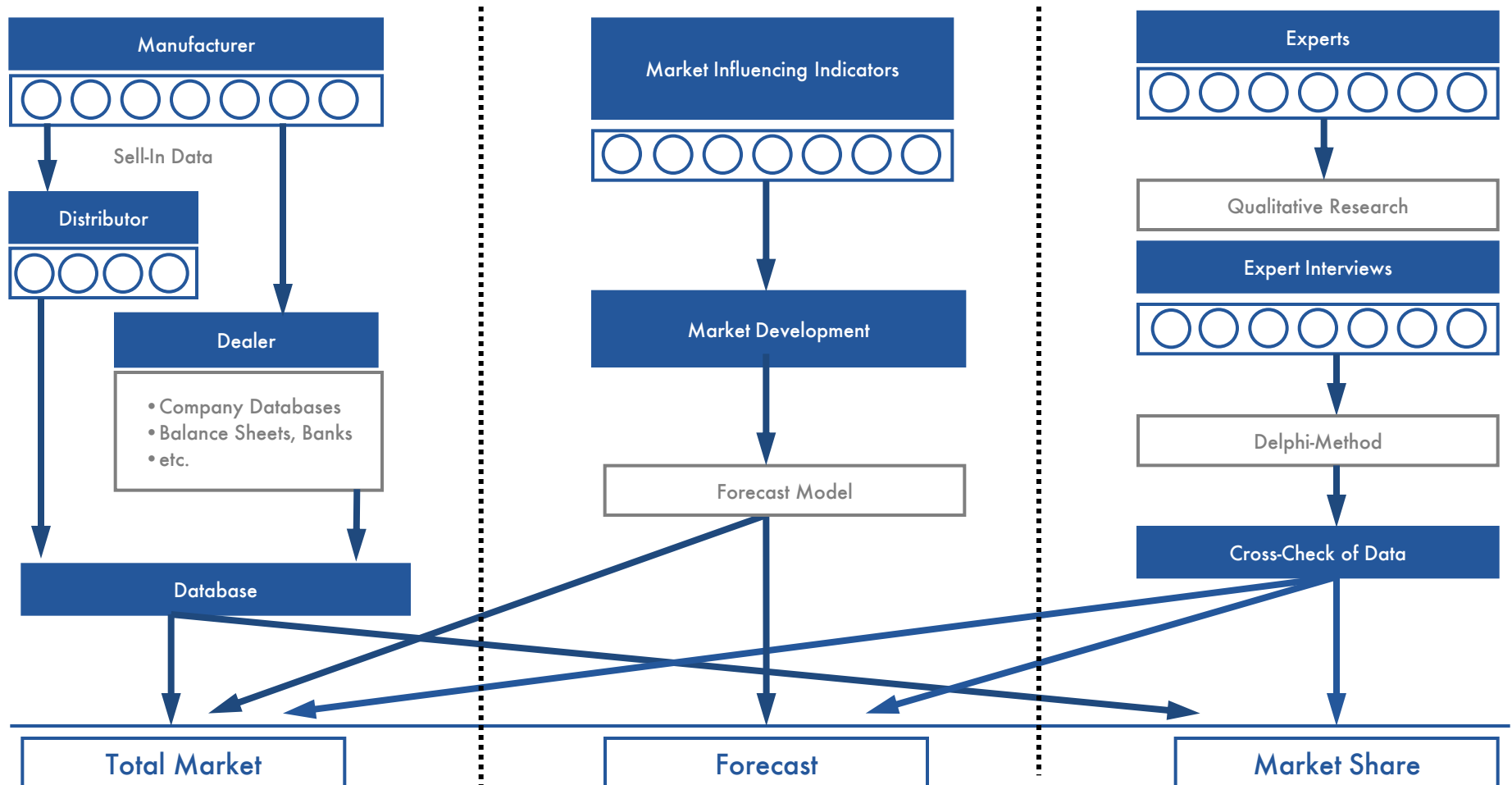
Sales are segmented by the first distribution partner.
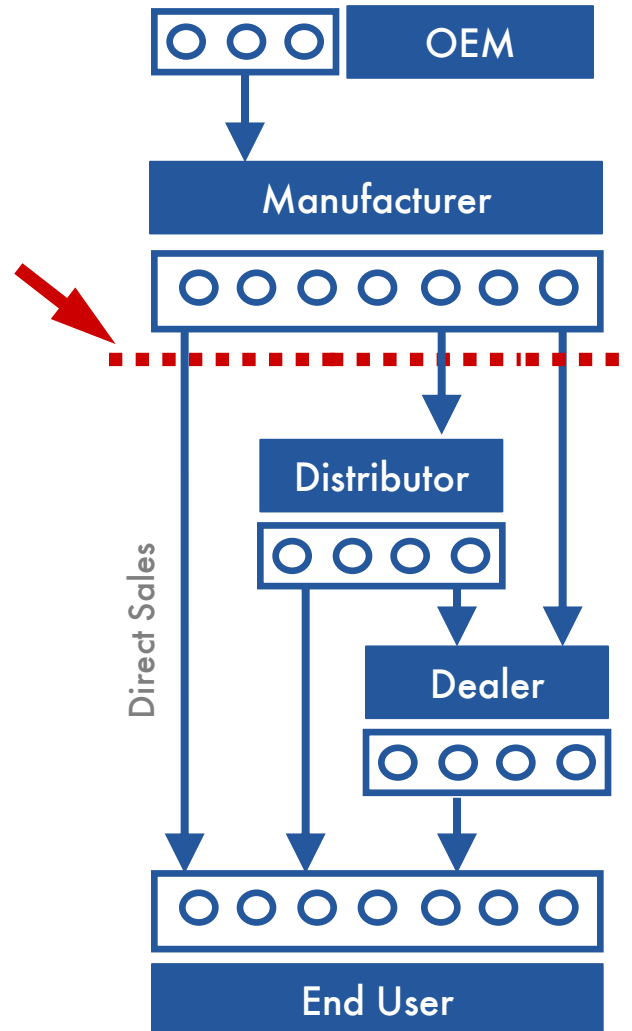
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

Manufacturer	Market Influencing Indicators	Experts

Sell-In Data

Distributor

Dealer

• Company Databases
• Balance Sheets, Banks
• etc.

Database

Market Development

Forecast Model

Qualitative Research

Expert Interviews

Delphi-Method

Cross-Check of Data

Total Market	Forecast	Market Share

Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

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Approach Sell-In

Manufacturer

TOP 10

All Others

∑ Total Market

Market Shares

TOP DOWN

Experts

Cross-Check

Distributor

Approach Sell-Out

∑ Total Market
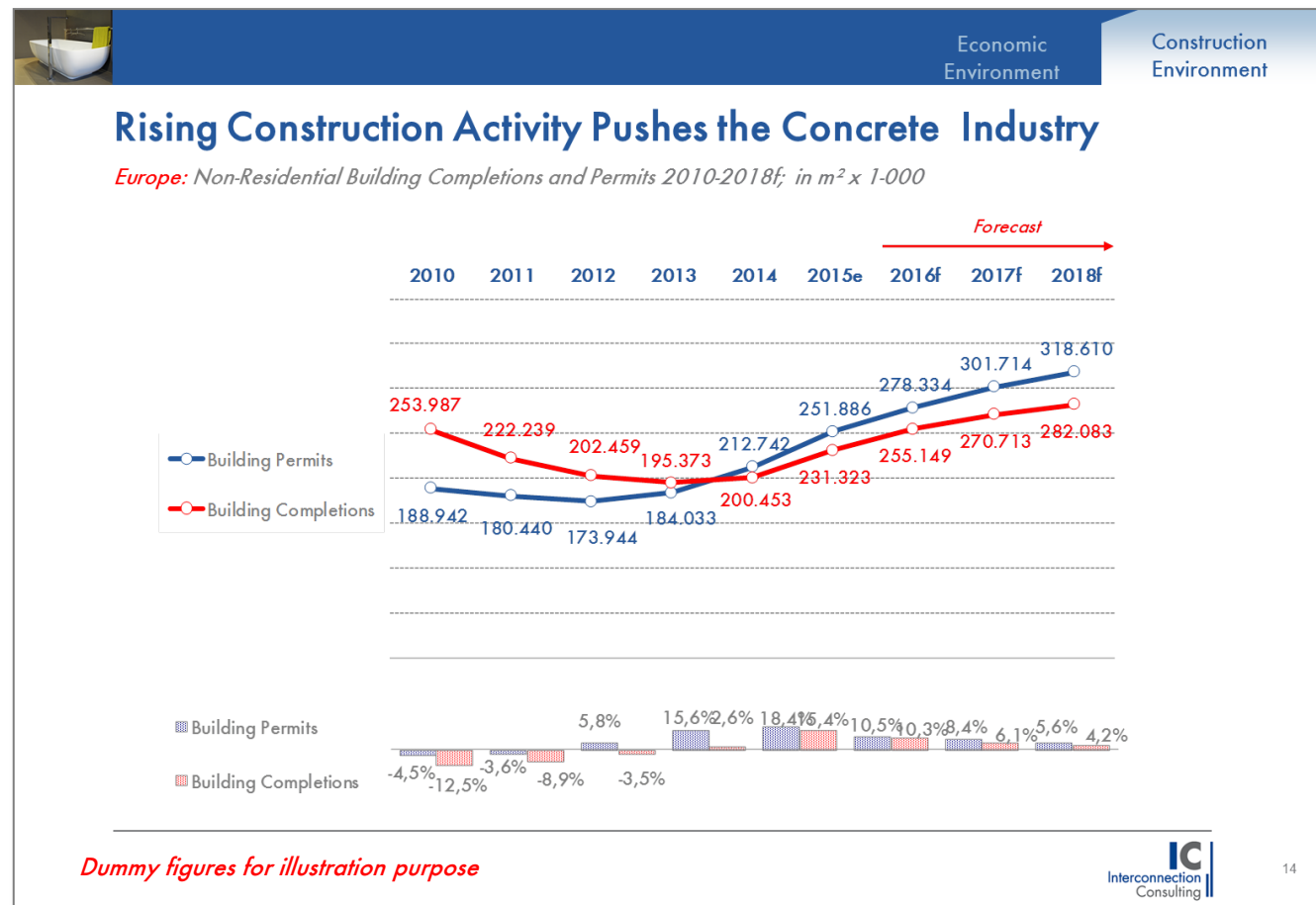
Manufacturer

Dealer

Buyer

Customer

BOTTOM UP
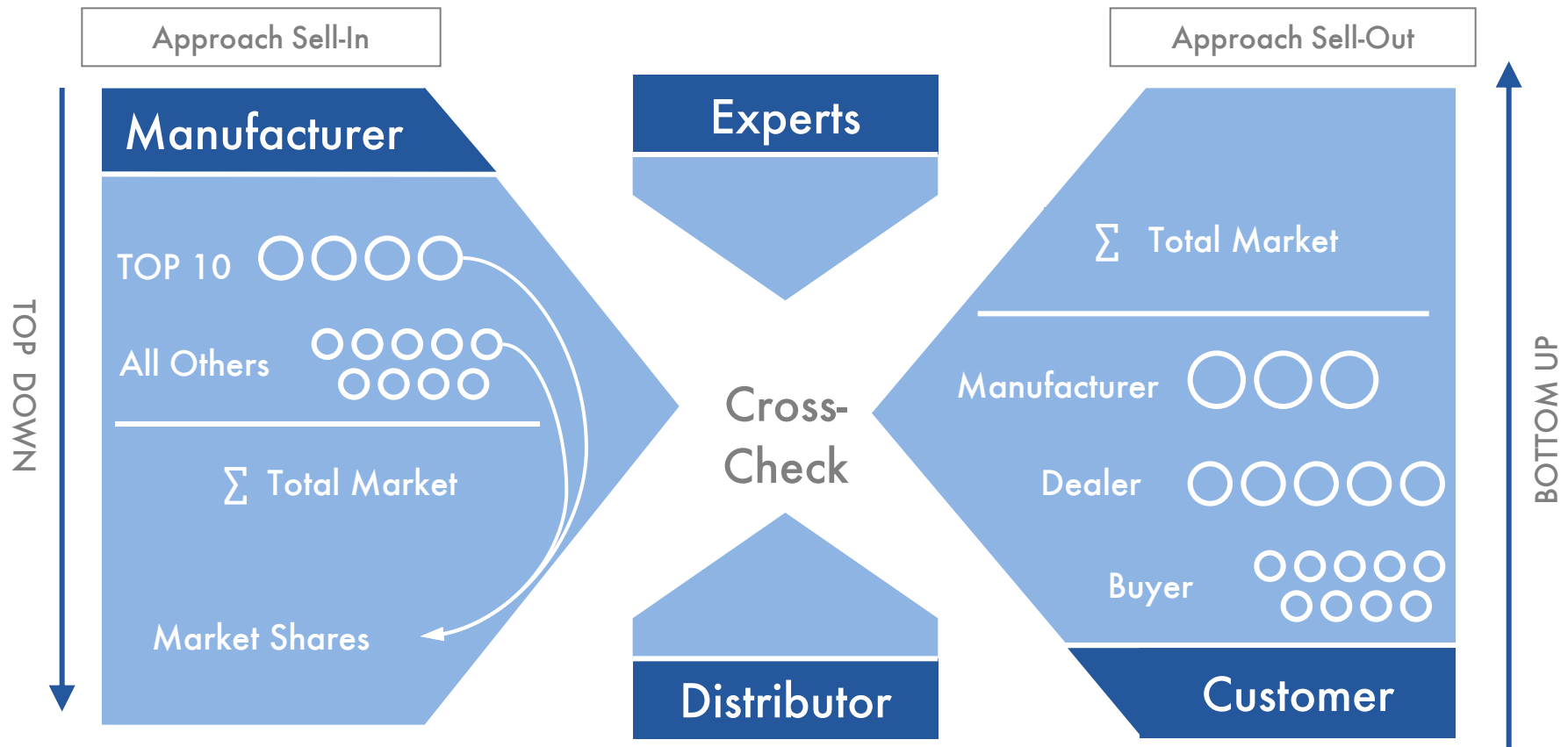
Contents of the IC Market Forecast®

*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 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 **Supplier-Matrix** show in detail s in which product groups the top glass processing companies are doing business and which glass they require.

- 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 Tracking Model

- *Overview of the development of relevant micro- and macro economical market influencing factors.*

- *This chart shows dummy figures.*

Rising Construction Activity Pushes the Concrete Industry

Europe: Non-Residential Building Completions and Permits 2010-2018f; in m² x 1-000

Forecast

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015e | 2016f | 2017f | 2018f |

Building Permits
Building Completions

318.610
301.714
278.334
251.886
253.987
222.239
202.459
195.373
212.742
200.453
231.323
255.149
270.713
282.083
188.942
180.440
173.944
184.033

Building Permits: 5,8% 15,6% 2,6% 18,4% 15,4% 10,5% 10,3% 8,4% 6,1% 5,6% 4,2%
Building Completions: -4,5% -12,5% -3,6% -8,9% -3,5%

Dummy figures for illustration purpose

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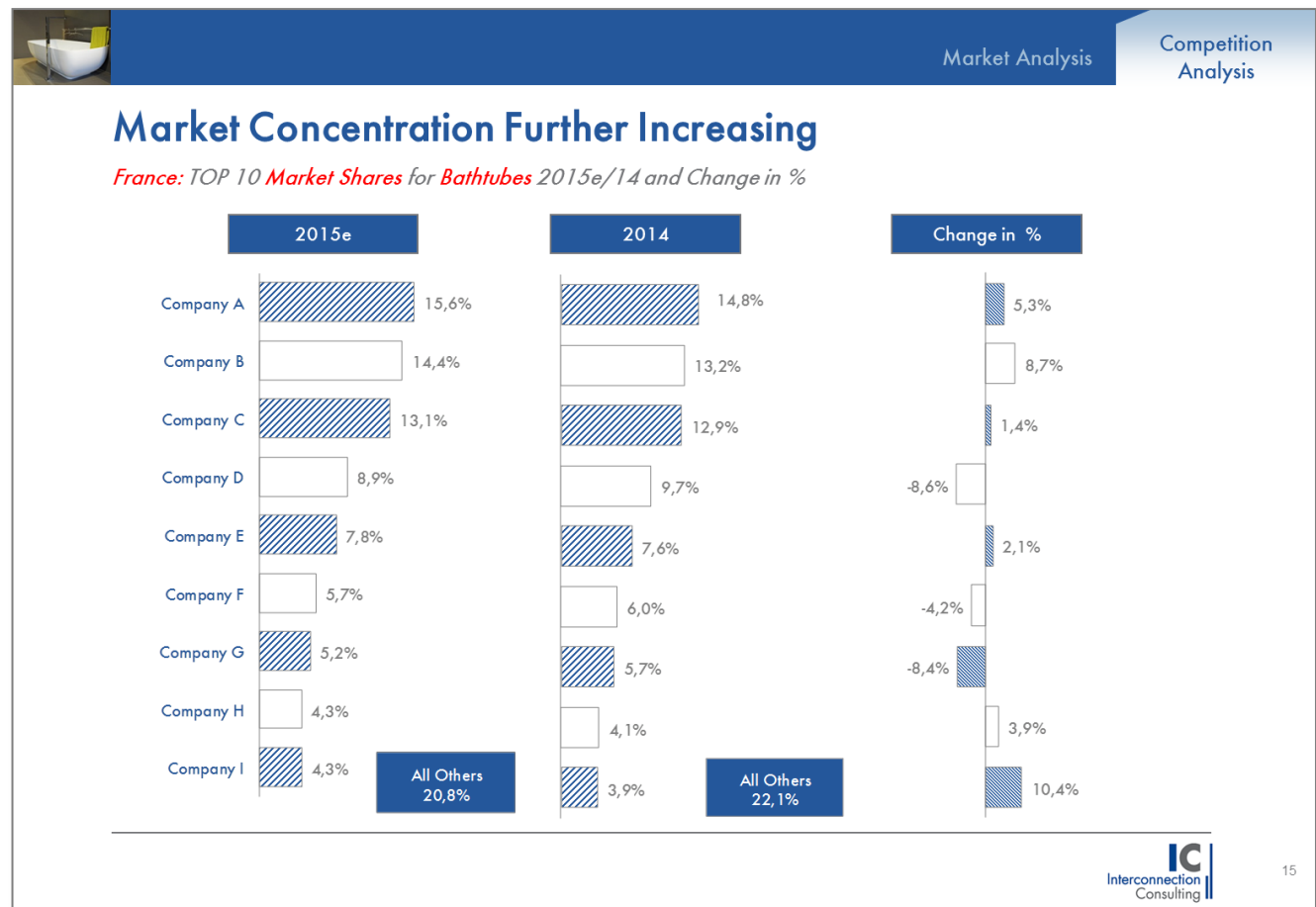# Total Market Development and Forecast

- *Overview of the total market development until the current year and forecast for the next three years.*

- *Dieses Chart zeigt fiktive Zahlen.*

Analysis of Product Groups and Segments
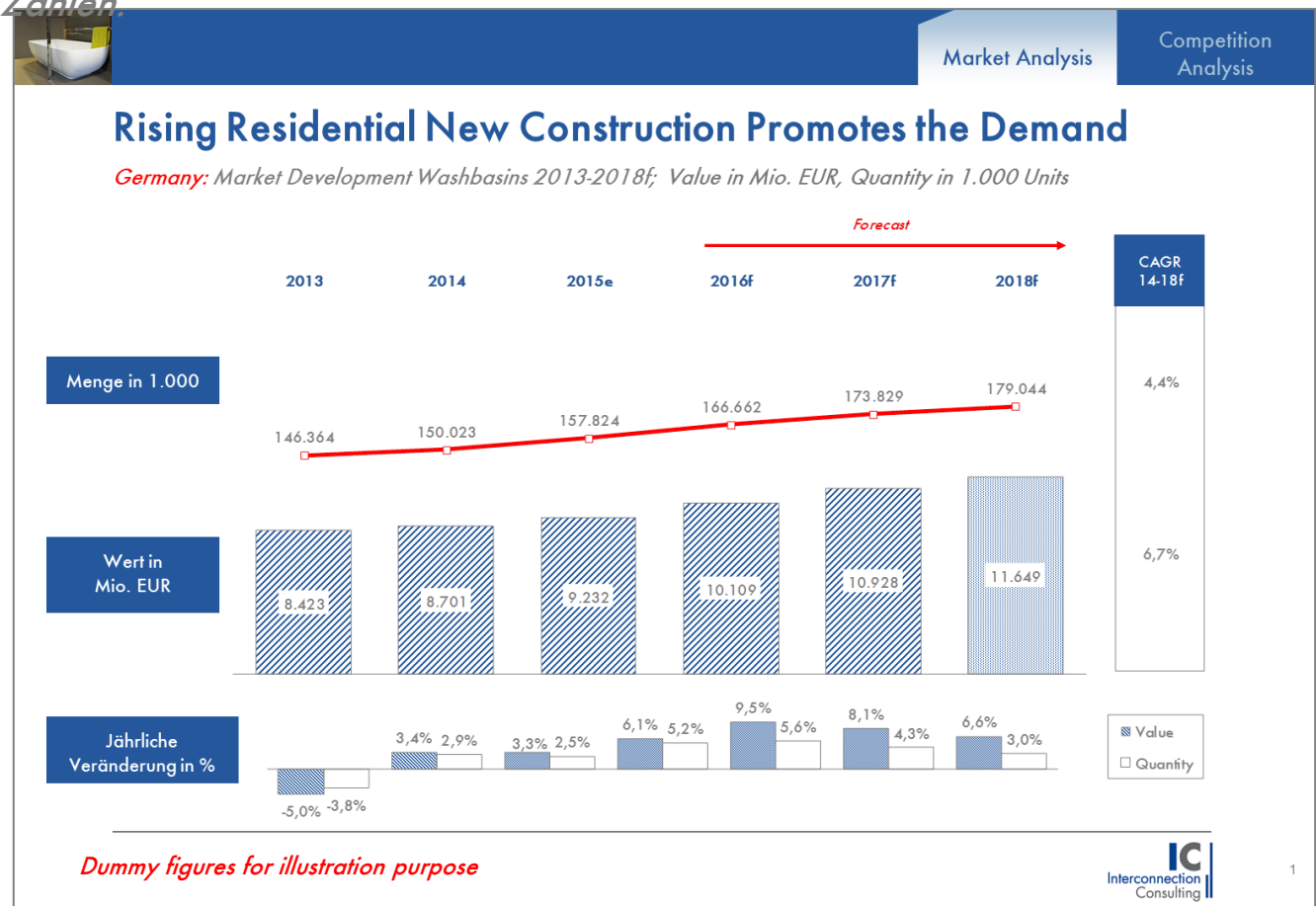
- Overview of different application segments including forecats for the next three years.

- This chart shows dummy figures.

| | Market Analysis | Competition Analysis |

Washbasins Account for a Third of the Market Volume

France: Market Development by Product Group 2013 -2018f, Value in %

Forecast

	2013	2014	2015	2016e	2017f	2018f	2019f	Avg. Share 14-18f
Urinals	16,3%	16,7%	18,5%	17,8%	16,3%	14,5%	13,9%	16,8%
Toilets	13,7%	13,3%	12,4%	12,2%	12,7%	12,5%	11,1%	12,6%
Bidets	4,8%	5,2%	6,0%	6,7%	5,5%	5,7%	5,8%	5,8%
Shower Trays	17,8%	18,0%	18,3%	18,7%	19,3%	19,9%	20,5%	18,8%
Bathtubes	15,5%	14,8%	14,0%	14,4%	14,7%	15,5%	16,3%	14,7%
Washbasins	31,9%	32,0%	30,8%	30,2%	31,5%	31,9%	32,4%	31,3%

Dummy figures for illustration purpose

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Competition Analysis and Market Shares

- *Market Shares of the Top 10 market players for each analyzed product group.*
- *This chart shows dummy figures*

Market Analysis | Competition Analysis

Market Concentration Further Increasing

France: TOP 10 Market Shares for Bathtubes 2015e/14 and Change in %

	2015e	2014	Change in %
Company A	15,6%	14,8%	5,3%
Company B	14,4%	13,2%	8,7%
Company C	13,1%	12,9%	1,4%
Company D	8,9%	9,7%	-8,6%
Company E	7,8%	7,6%	2,1%
Company F	5,7%	6,0%	-4,2%
Company G	5,2%	5,7%	-8,4%
Company H	4,3%	4,1%	3,9%
Company I	4,3%	3,9%	10,4%
All Others	20,8%	22,1%	

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IC Market Forecast® Sanitary Ware in Europe

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	Single Issue	IC Subscription*	Scale of Discounts	
Single Country	€ 2,950.-	*IC SUBSCRIPTION 20 % PRICE ADVANTAGE*	€ 10,000	-25%
Europ TOP 6	€ 8,850.-		€ 12,000	-40%
			€ 15,000	-50%

Included Countries	Benelux	France	Germany	Italy	Spain	UK

* **IC Subscription**: 20% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

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

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the glass and construction industry.

- With our headquarters in Vienna and local offices in Lviv (Ukraine), Bratislava (Slovakia) and Gdansk (Poland) we combine local and international analytical competence.

- Our studies support the leading companies in the determination of targets, definition of marketing strategies, 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 Glass in exterior construction Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.

- Our Consultant supports companies also in the implementation of data in actions = in the development of marketing strategies.

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

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

Interconnection Consulting

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we show you the way

Factsheet: Sanitary Ware in Europe

IC Interconnection Consulting

Included in the Report

- interactive PDF, approx. 95 pages
- Pivot Tables
- Optional: Hard Cover

Price

- All countries: 8,850.-€
- Hard Cover: 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,

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: consumer behaviour, main economic indicators etc.
Import & export statistics

Total Market Analysis
Total market development and forecasts for all market segments in quantity and value by regions, product groups, business segments, customer segments, distribution channels and opening types.

Supplier-Matrix
The supplier-matrix shows for the top glas processing companies in which product groups they are doing business..

Market Structure

Regions:
Benelux, France, Germany, Italy, Spain, UK

Product Groups
Washbasins, Bathtubs, Shower Trays, Toilets, Bidets, Urinals

Business Segment
New Construction, Renovation.

Customer Segment
Residential, Non-Residential

Methodology

Methodology and Data Sources

The market 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 analysed 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.