



IC Market  
Tracking/Forecast®  
Roof Tiles in Europe  
2018

## IC Market Tracking/Forecast® Roof Tiles in Europe 2018



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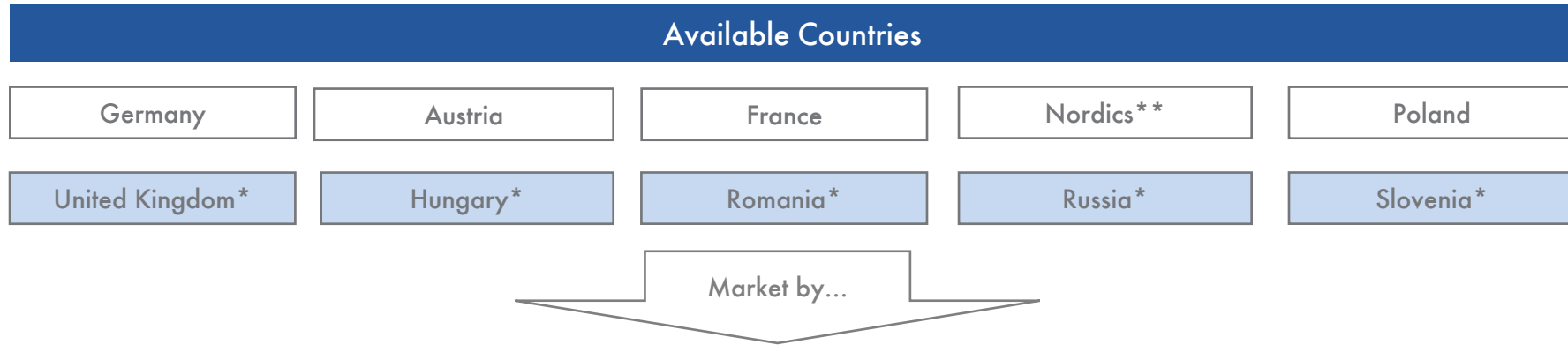
References

Prices

## 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
  - Countries
  - 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.





\*Countries are only available as a **Market Forecast®**

\*\*Norway, Sweden, Finland, Denmark

Product Groups		Distribution Channels	Customer Segments	Business Segments
Clay	Concrete	Direct	New Construction	Residential
Fiber Cement	Metal	Indirect	Renovation	Non-Residential
Slate	Others			

**Market Tracking** - For each segment the total market for 2017-2021 (2018- 2021 as a forecast) will be shown as well as market shares of the top players for 2016-2017 in total and per product group.

**Market Forecast** - For each segment the total market for 2017-2021 (2018- 2021 as a forecast) will be shown.

## Roof Tile

Roof covering pieces made of clay, slate, concrete, metal, fibre cement and other materials. This research relates only to inclined roofs

## Inclined Roof

Roofs with an inclination over 5 degree angle



## Abbreviations

CAGR

Compound annual growth rate: 2015-2019

Avg. Share

Average share: 2015-2019

2019f

Forecasted

## Product Groups

Clay

Concrete

Fibre Cement

Metal

Slate

Others

Turnover is stated in 1.000 Euro. Values are always net-turnovers (not list-prices), excluding VAT

Volume is stated in 1.000 m<sup>2</sup>

Roof tiles made of clay

Roof tiles composed of cement and others cementitious materials such as fly ash and slag cement, aggregate, water and chemical admixtures

Roof tiles composed of cement, silica sand and cellulose fibers

Roof tiles or pieces made of metal: aluminum, copper, tin, corrugated galvanized steel, stainless steel, Galvalume or Zinalume (a blend of zinc, aluminum and silicon-coated steel)

Roof tiles made of metamorphic rock slate

Roof tiles made of bitumen, polymerbitumen, wood, thermoplastic (PVC, TPO, CSPE), synthetic rubber, asbestos, asphalt shingles etc.



Not included: Flat roofs up to 5 degree angle, roofing made of plant material

## Distribution Channels

Direct

Sales to customers without interference of any third party

Indirect

Sales to retailers, industrial, commercial, institutional, or other professional business users or to other wholesalers and related subordinated services

## Customer Segments

Residential

Residential: 1 or 2 dwellings + flats

Non Residential

Commercial, office, health and education dwellings



## Business Segments

New Construction

Process of creating a structure

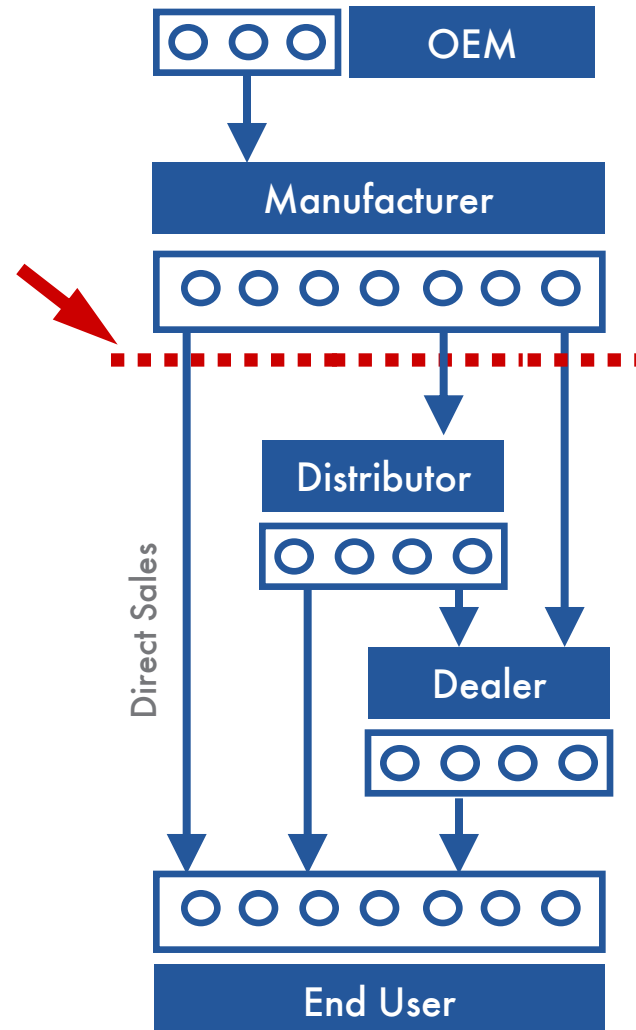
Renovation

Process of restoring or improving a structure



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.

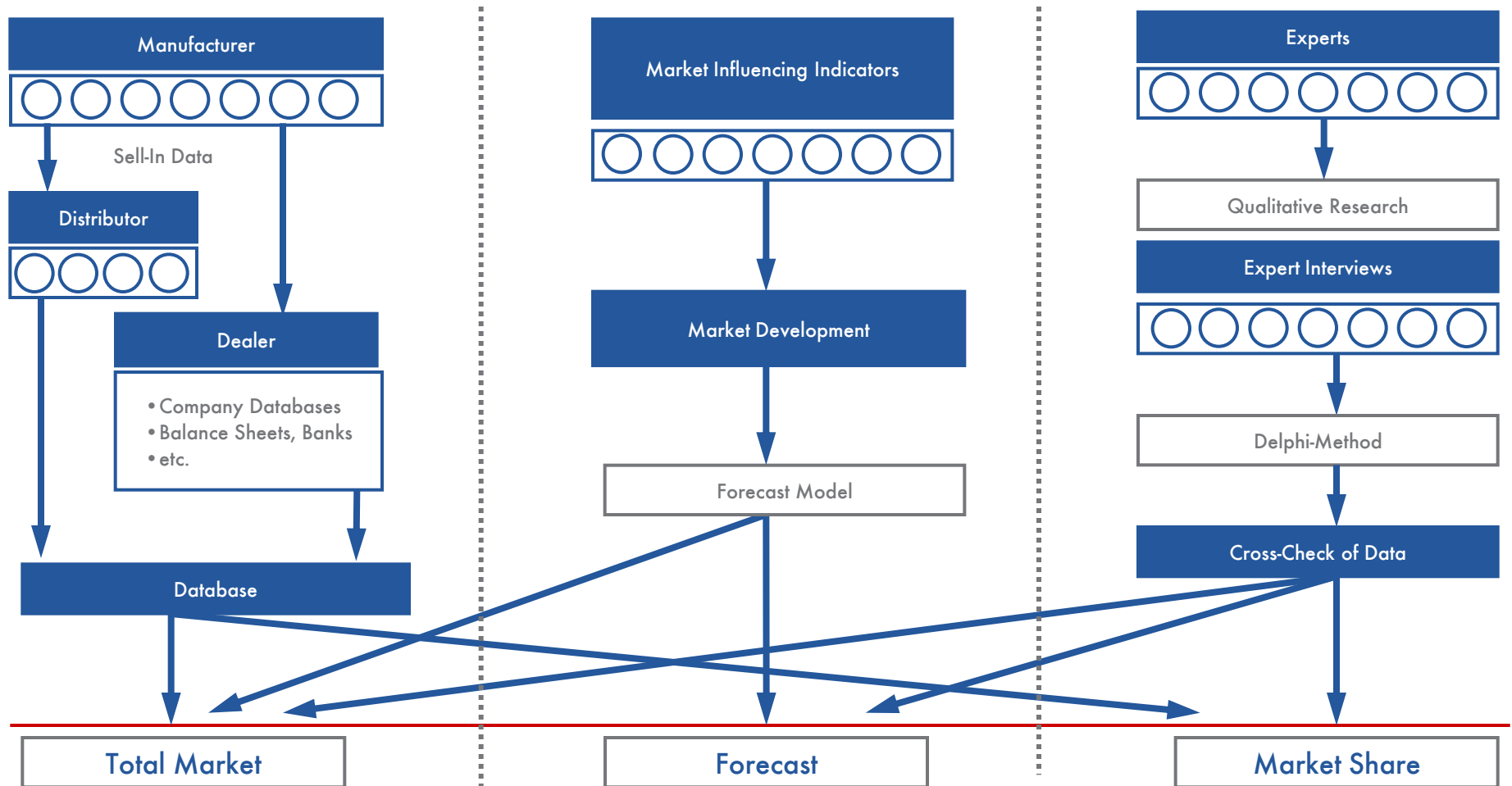
Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.



# Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

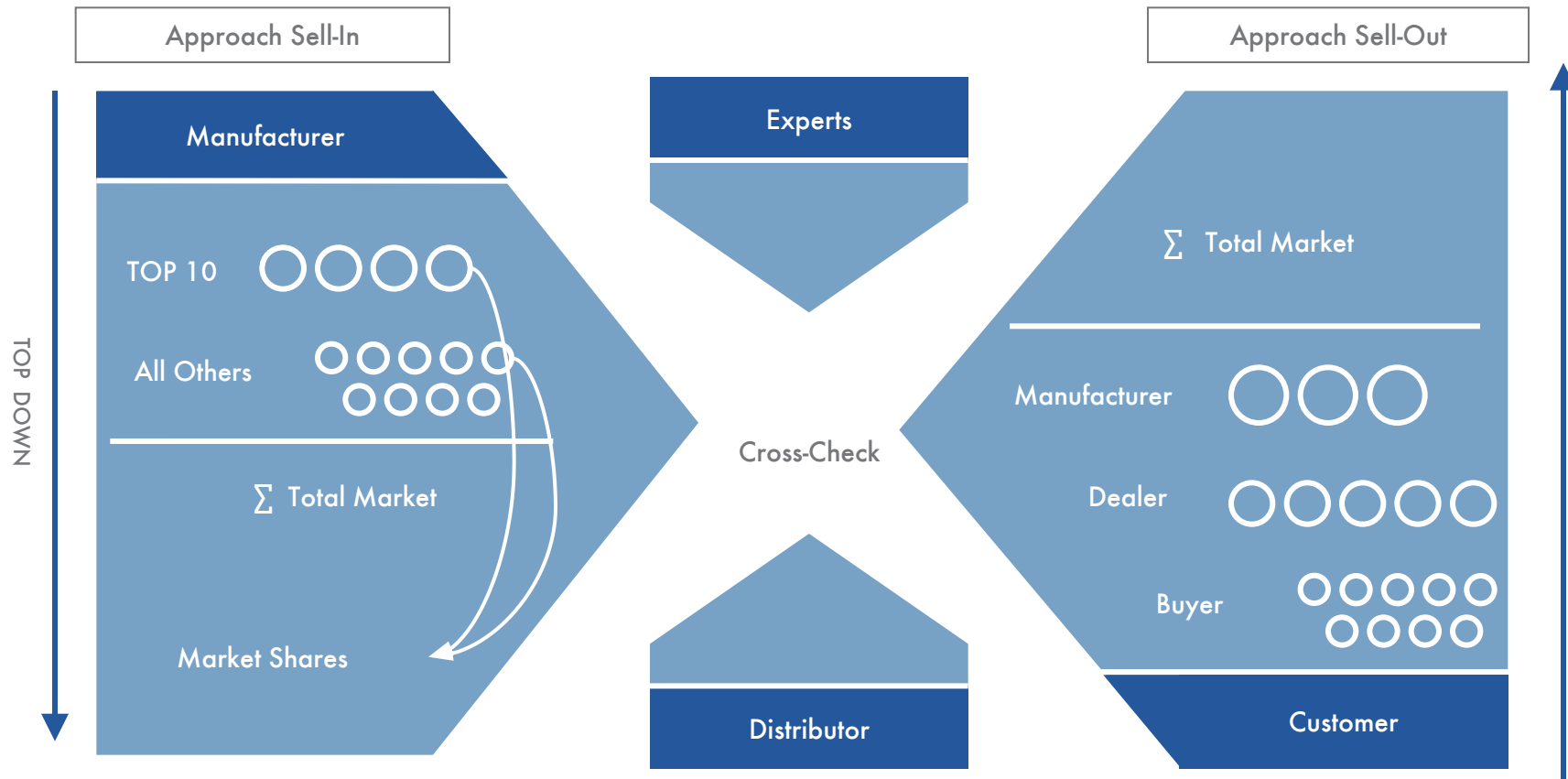
Methodology



# Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology

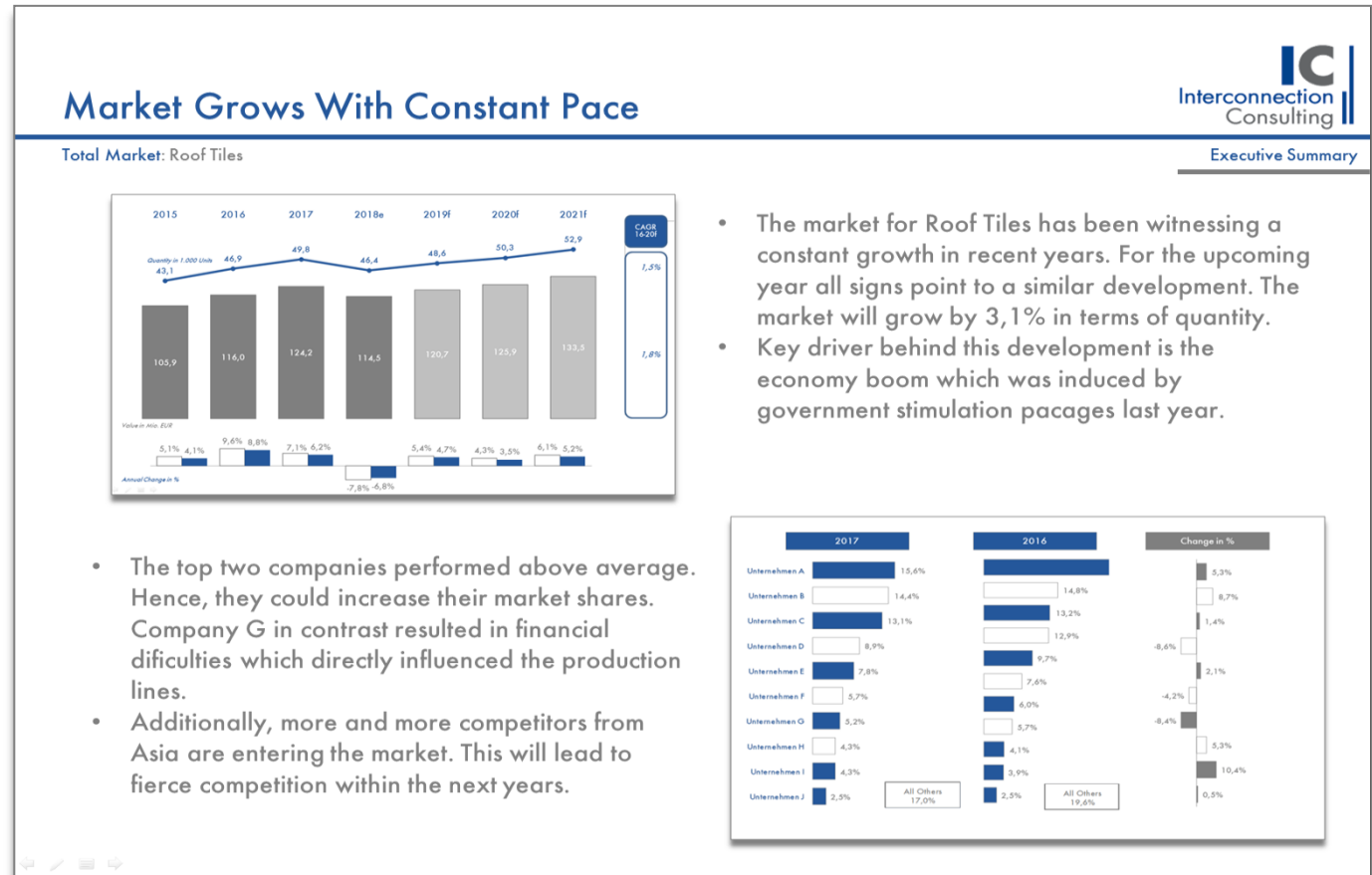


*The IC Market Tracking® is modularly built and consists of the following sections:*

- 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 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.
- 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.

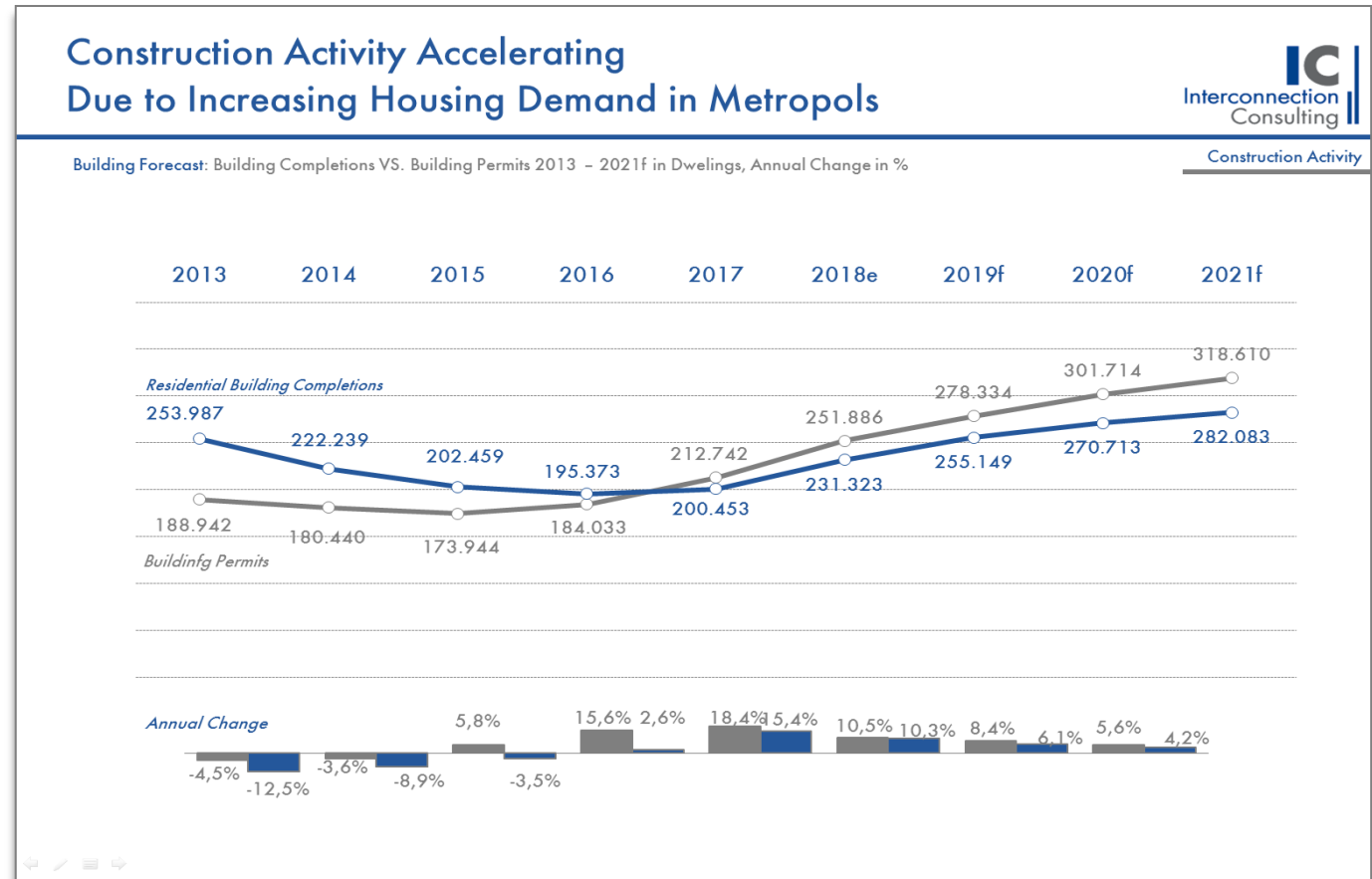
# Executive Summary at the Beginning of the Report

- The executive summary comprises all relevant information of the report in precise manner. Forecast and
- competition situation is highlighted
- *This chart shows dummy figures.*



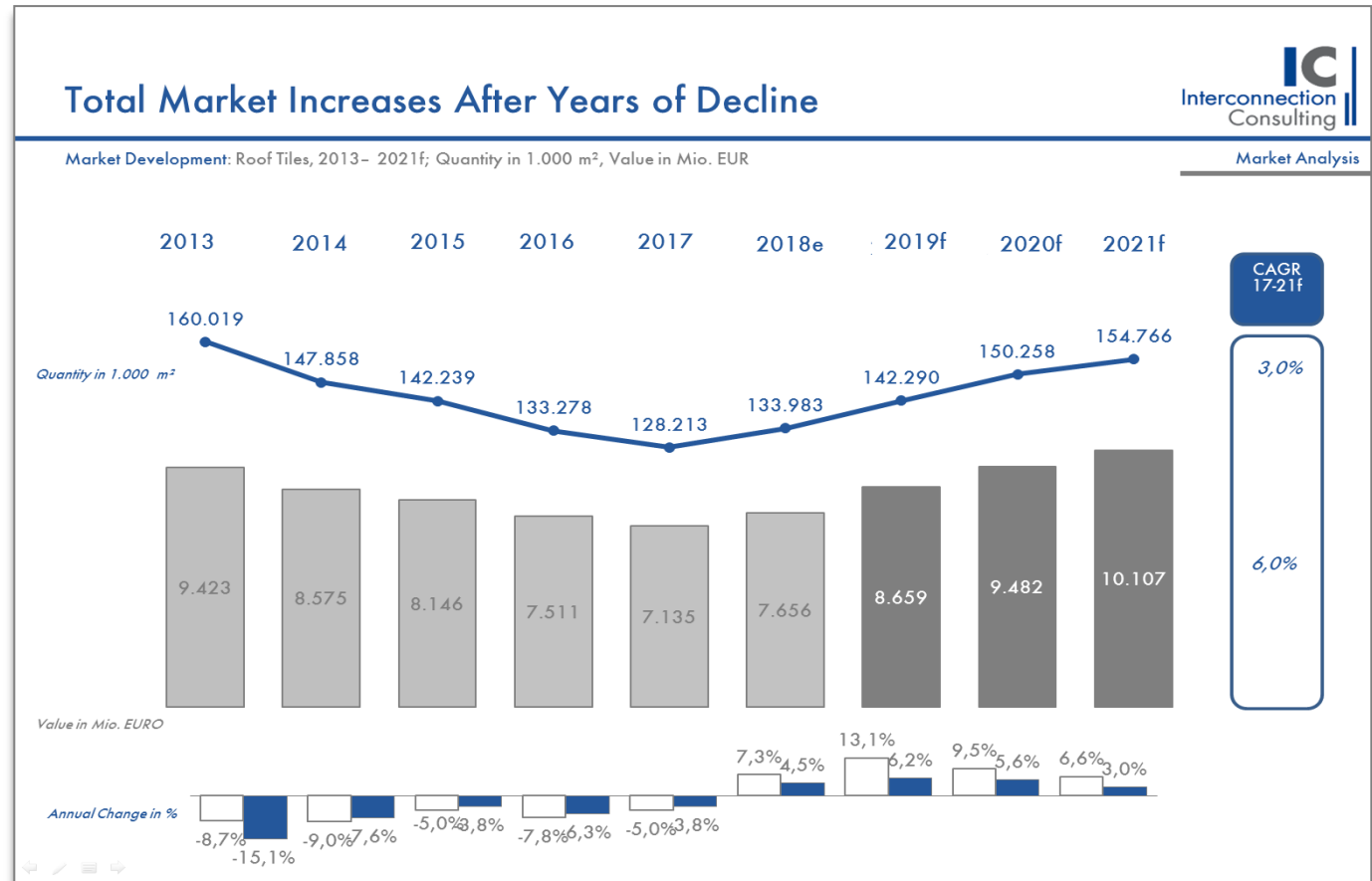
# Market Environment Data of Our Forecasting Model

- 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

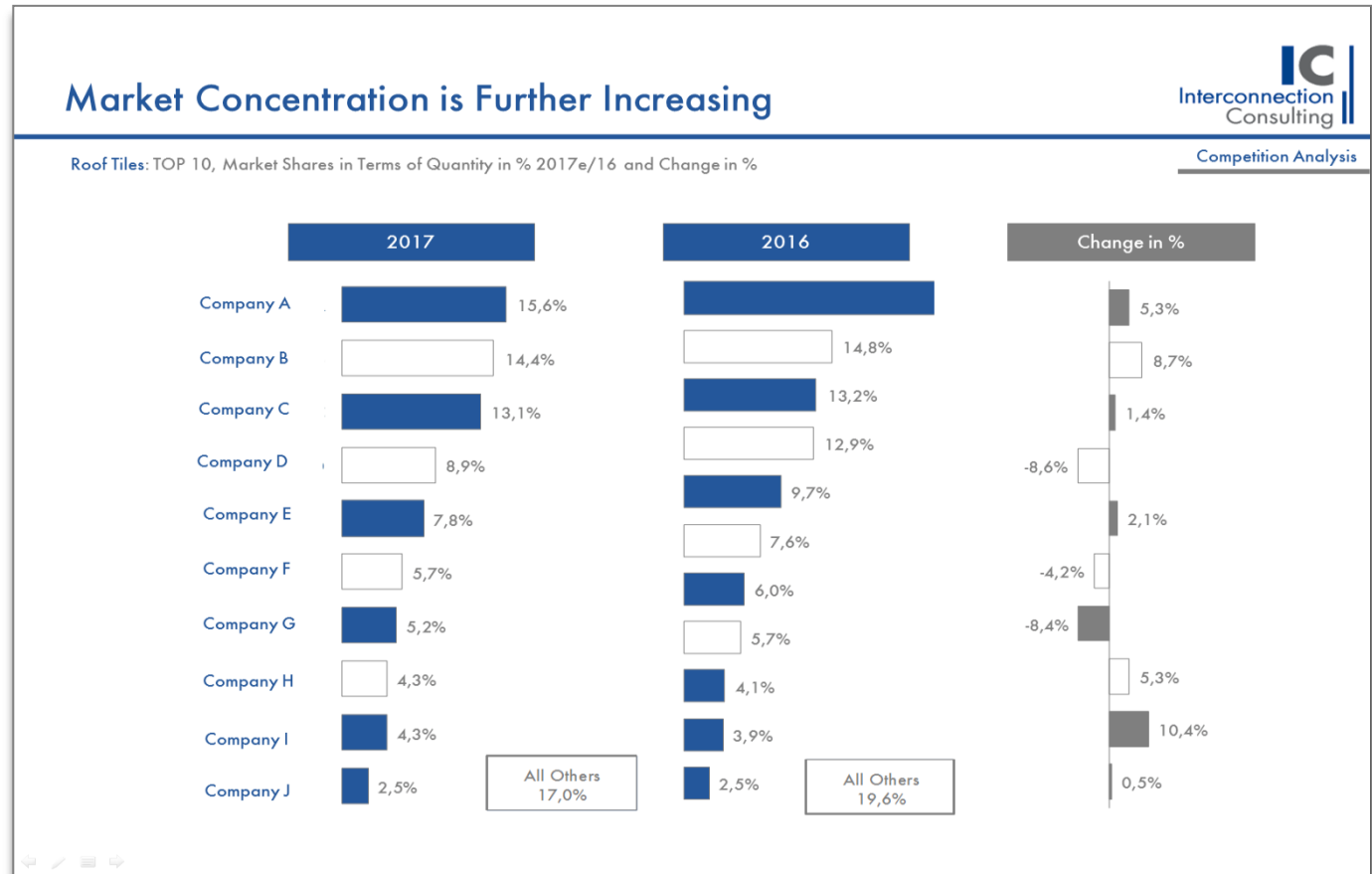
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



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



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*





- Additionally to the visualised 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 modeling.
- 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	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

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 - #	
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

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

*Dieses Chart zeigt fiktive Zahlen zur Illustration*

	Single Issue	IC Subscription*	Scale of Discounts	
Single Country MT	€ 2.950,-	<b>20 % ABOVORTEIL</b>	€ 5.000,-	10%
Single Country MF	€ 1.950,-		€ 10.000,-	20%
Europe Total **	€ 17.150,-		€ 15.000,-	25%
			€ 20.000,-	30%

## Available countries

Germany	Austria	France	Nordics**	Poland
United Kingdom	Hungary	Romania	Russia	Slovenia

\* **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 taking into account the scale of discount

Price includes an interactive PDF Document. All prices shown exclude sales tax

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- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily


# Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the window 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 several industries.
- Next to market data we offer for the construction 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.



# Our 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

### E-Commerce



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

# Chosen References



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

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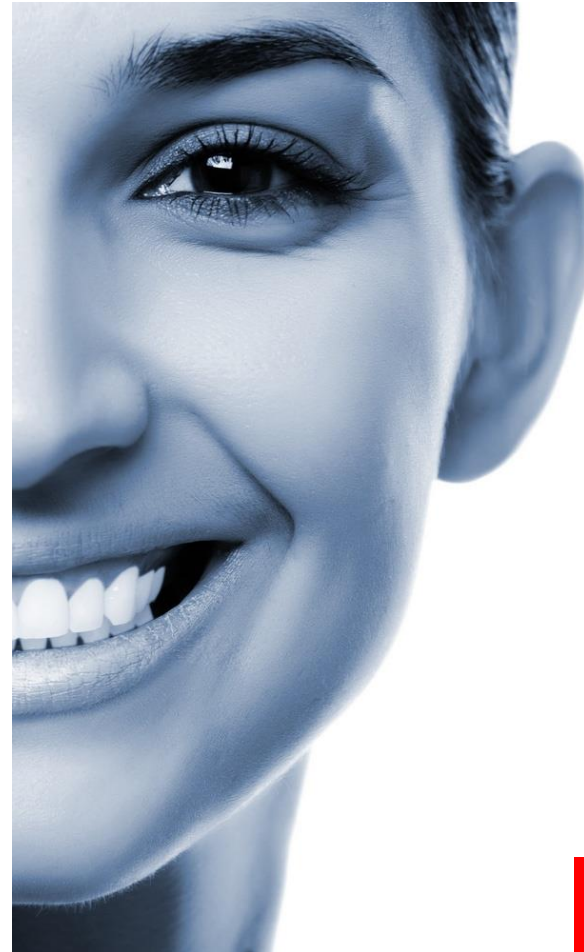
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## Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 70
- Optional: Hard Cover

## Price

- Single Country MT: 2.950 €
- Single Country MT: 1.950 €
- 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.



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- Click „Buy Now“ on the website and make your order with the interactive price calculator.
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## Content:

### Structure of 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 behavior, 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.

#### Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region.

### Market Structure

#### Countries

Germany, Austria, France, Benelux, Nordics (Finland, Norway, Sweden, Denmark), Czech Republic, Poland, Slovakia

#### Product Groups

Concrete , Clay, Metal, Fibre Cement, Slate, Others

#### Distribution Channels

Direct, Indirect

#### Customer Segments

New Construction, Renovation

#### Business Segments

Residential, Non-Residential

### 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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