



IC Market Forecast®
Roof Types & Roofing
Worldwide 2022

www.interconnectionconsulting.com

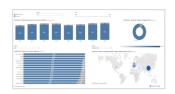
Company Profiles





Interactive Dashboards





Market Drivers



automatically updated



more than just a report - A TOOL FOR SUCCESS!

defining growth potential since 1998

Detecting Market
Potential



GEO-Maps



Benchmarks



Strategic Workshops



on request

What Do You Get - Your Benefits at a Glance Content of the Report



Benefits

Market Data, Insights and Expertise...

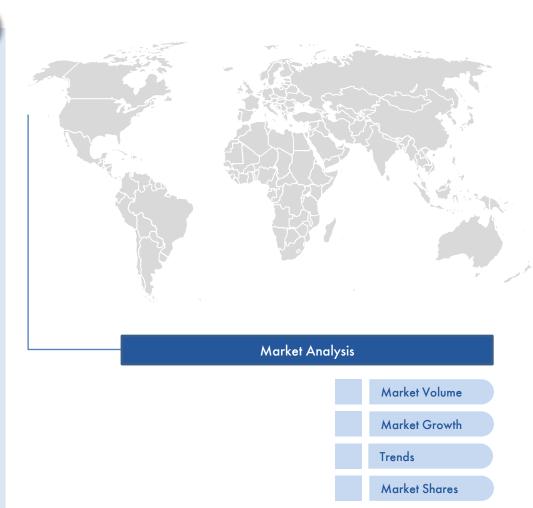


MARKET ANALYSIS

- Historical market data from 2018 2021 for the total market development as well as
 - Product Groups by Roof Types
 - Roof Feature Segments
 - Customer Segments
 - Business Segments
 - Distribution Channels
- Forecasts from 2022 2025 for the total market as well as each analyzed product group and segment
- Annually updates of the data

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.
- Continuous updates of the data



What Do You Get - Your Benefits at a Glance Presentation of the Data and Deliverables



Benefits

Market Intelligence Tool Access and Deliverables



ONLINE-COCKPITS

- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

EXECUTIVE REPORTS

- Executive report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts already integrated within Tableau

RAW DATA -TABLES

- Downloadable tables from MIS as xlxs. cvs. jpg. or other formats for your own integration
 - Graphs
 - Raw Data



Market Intelligence Tool and Reports



Online Dashboards

Executive Reports

IC Market Forecast® Roof Types & Roofing Worldwide 2022



Market Report Structure

Roof Type

Market Structure

Flat Roof Inclined Roof Others Concrete/cement + Bur/Gravel Clay Metal Metal Tiles Bitumen Metal Concrete Slate Glass Tiles (concrete, EPDM + Plastic (TPO Others Fiber Cement Others IR , PVC, Elastomers and slate, clay) Polyurearthane, etc) Others

Flat Roof Usage Segment

Green Roofs

Only Roof

Business Segments Customer Segments Distribution Channels Roof Feature Segments* New Construction Residential Direct No Feature Renovation Non-residential Indirect Solar Panels

Terrace & Activity

Available Countries

Austria

Russia

Benelux

Saudi Arabia

China

- Slovakia
- Czech Republic
- Spain

• France

- Sweden
- Germany
- Switzerland
- Hungary
- Turkey

Italy

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lidiy

• UAE

Poland

UK

- Romania
- USA

Market Forecast - For segments the total market for 2018-2025f is shown in Value (EUR) and in Quantity (m²). For Flat Roof Usage Segment the % of flat roof is presented and for *Roof Feature Segment as a % of roofs covered with panels (either for water or electricity, other features are not considered)

Market Structure - Interpretation





Available Countries

- Romania Austria Benelux Russia Saudi Arabia China Czech Republio Slovakia Spain France Germany Sweden Hungary Switzerland Italy Turkey ÚK UAE Poland USA
- Market data is available for each country separately as well as aggregated for the country package purchased.
 Each country report includes data for the total market of Roof Types in terms of value and quantity
- The total market is broken down by Product Groups Distribution Channels, Customer Segments, Business Segments and Roof Feature Segments

^{*}Countries are only available as a Market Forecast®

Definitions and Demarcation



Definitions

Roo	f	T۱	7	n	e
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Flat Roof

Flat roof with inclination up to 10 degrees or nearly horizontal

Inclined Roof

Roofs with an inclination over 10 degree angle

Others

Other type of roofs not included in the above category

Business Segment

New Construction

Roof tiles on newly constructed buildings

Renovation

Renovation of buildings and other areas which includes roof tiles

Customer Segment

Residential

Traditional residential housing, e.g. one, two or multiple family homes

Non-Residential

Non-residential buildings, such as buildings used for educational, industrial, healthcare or commercial purposes or factories.

Definitions and Demarcation



Definitions

Product Groups

Turnover is always displayed in millions of euros. The values are always expressed as net sales (no list prices) and discounts are included.

Bur/Gravel

Composing of layers of reinforcing fabric and asphalt finished with layer of aggreagte e.g. gravel, stone

EPDM+ Plastic (TPO, PVC, Elastomers and Polyurethan, etc. Owing to the base material of rubber, they are often referred to as elastomers. Since then, different materials have been used as roofing membranes: isobutylene-isoprene rubber (IIR), ethylene-propylene-diene monomers (EPDM), nitrile rubber (NBR), chlorosulfonyl polyethylene rubber (CSM) and butyl rubber (IIR). They are defined according to the standard DIN 7864. Plastic - Made of Polyolefin alloys (FPO / TPO), Polyvinyl chloride (PVC-P), Ethylene copolymeris bitumen (ECB), Polyisobutylene (PIB), Ethylene vinyl acetate copolymer (VAE / EVA) or chlorinated polyethylene (PEC).

Bitumen

With carrier insert and outer layer made of polymer bitumen, modified with thermoplastic elastomers (PYE) or polymer bitumen, modified with thermoplastics (PYP)

Concrete/cement +

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

Metal

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

Others

Other product groups not specified in the above categories

Terrace

Flat roof or open platform

© Interconnection Consulting

Jerinifion

Definitions and Demarcation



Definitions

Product Groups	Turnover is always displayed in millions of euros. The values are always expressed as net sales (no list prices) and discounts are included.
Clay	Roof tiles made of clay
Concrete	Roof tiles composed of cement and others cementious materials such as fly ash and slag cement, aggregate, water and chemical admixtures
Fibre Cement	Roof tiles composed of cement, silica sand and cellulose fibers
Metal	Roof tiles or pieces made of metal: aluminum, copper, tin, corrugated galvanized steel, stainless steel, Galvalume or Zincalume (a blend of zinc, aluminum and silicon-coated steel)
Slate	Roof tiles made of metamorphic rock slate
Others	Roof tiles made of thermoplastic (PVC, TPO, CSPE), synthetic rubber, asbestos, asphalt shingles etc.
Glass	Glass types of roofs composed of hard coat, soft coat, toughened glass, laminated glass. Excludes walls, cellars, balconies etc.
Green Roof	Layer of vegetation planted over a waterproofing system that is installed on top of the roof

The Unique Mix of Methods and Approaches for Reliable Market Analysis



Methodology



The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



Basis of the analysis are surveys electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our USP "Only who talks with the industry knows what's going on!"

The Market Intelligence Tool Dashboards - The Best Way to Work with Data



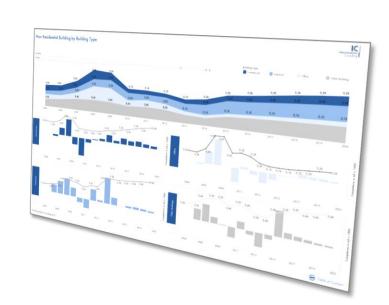
IC Cockpit

A picture says more than 1000 words

 Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

 Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.



Easy online accesability

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file

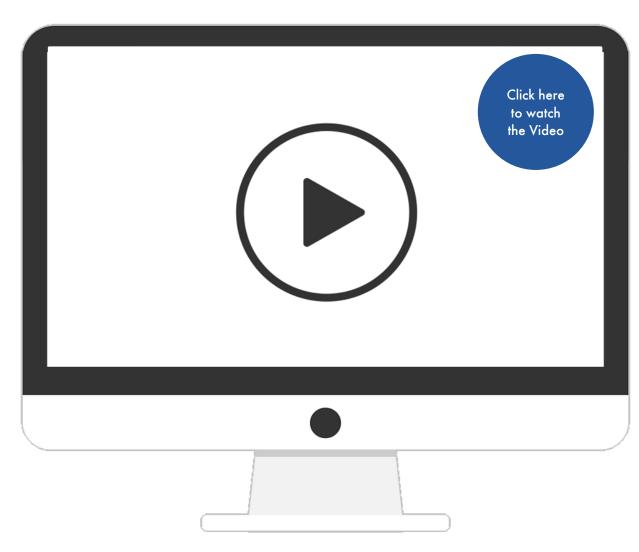
In case of purchase exceeding \leqslant 5.000,- (net), the price of Tableau cockpit is waived as well as for any subscription order exceeding 2 countries or regions. For all other options, price for Tableau cockpit costs \leqslant 500,-.

Usability of the Market Intelligence Tool

Let's Put it in a Video...



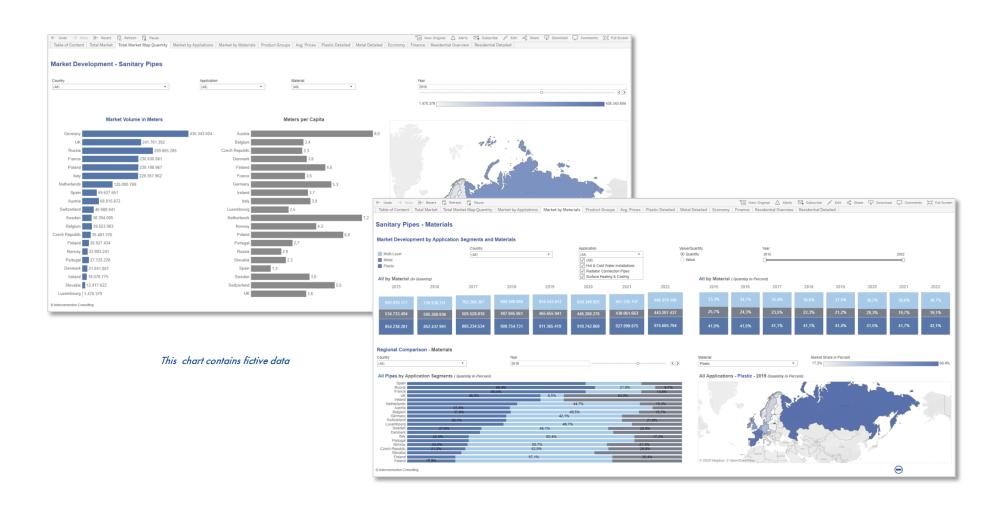
IC Cockpit



Sample Cockpits for Market Analysis Data



IC Cockpit



Additional Deliverables Executive Summary and Pivot-Tables



Sample Charts



Pivot-Table includingall raw data as MS-Excel file (fictive data)

Investment Plan for Your Market Research



IC Market Forecast® Roof Types & Roofing Worldwide 2022

Prices & Conditions

Subscription*

3 Countries of Your Choice

6 Countries of Your Choice

12 Countries of Your Choice

All Countries

€ 5.950,-

€ 9.950,-

€ 17.950,-

€ 24.950,-



Available Countries

- Austria Poland Slovakia France Turkey Benelux Romania Spain UAE Germany China Russia Sweden UK Hungary Czech Republic • Saudi Arabia Italy Switzerland USA
- Subscription: 25% 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 automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.
- The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of an subscription.
- In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit (Software for Online Dashboards) is included as well as for any subscription order exceeding 2 countries or regions. For all other options, license costs for Tableau cockpits are € 500,- per license per year.

Chosen References



References









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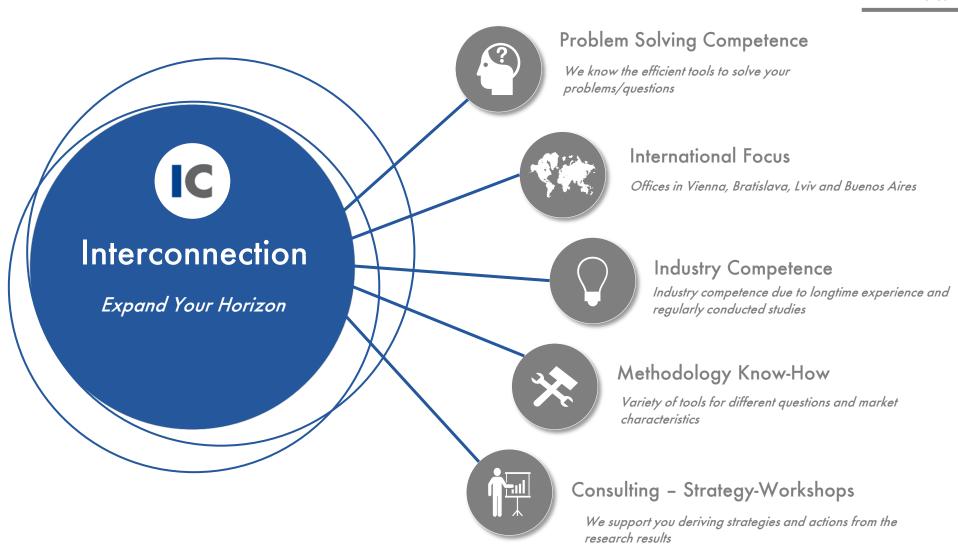




Interconnection Provides Data for Corporate Decisions



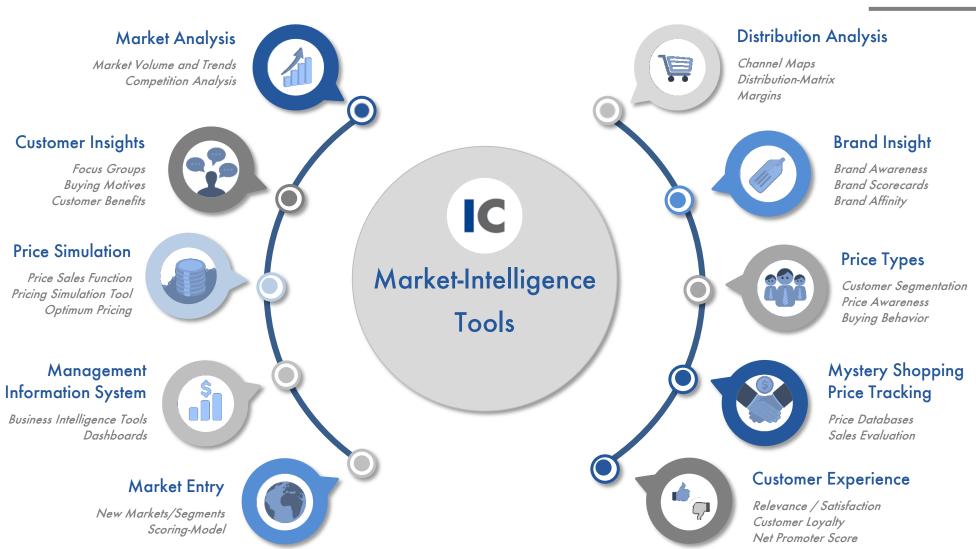
Interconnection



Our Market-Intelligence Tools



Interconnection





In case of any questions please do not hesitate to contact us!

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Yes, we would like to order the IC Market Forecast® Roof Types & Roofing Worldwide 2022

(Please, print out the order form and mark your desired products)

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Full Flexibility – Within the country reports can be ch				✓
Web-Conference with the	analyst free of charge			✓
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*Subscription:

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 31" December. 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 includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of a subscription.

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