



IC Market Forecast[®] Sealings & Fillers of Construction Joints in Europe 2020

- Germany
- Austria
- France
- Switzerland
- Benelux
- Italy

Your Benefits at a Glance

- ✓ Overview of the development of the **total market** and **individual segments**.
- ✓ **Market Forecast** for all product groups and segments for the upcoming three years, based on our econometric models and with respect to:
 - **Total Market**
in Terms of Value ; in Terms of Volume (Quantity in liters: Sealants, Adhesives, PU Foams; Quantity in meters: Joint Sealing Tapes)
 - **Joint Types**
in Terms of Value
 - **Customer Segment**
in Terms of Value
 - **Application Types**
in Terms of Value
 - **Joint Types**
in Terms of Value
 - **Product and Sub product Types**
in Terms of Value ; in Terms of Volume (Quantity in liters: Sealants, Adhesives, PU Foams; Quantity in meters: Joint Sealing Tapes)
 - **Distribution**
in Terms of Value
- ✓ Information about the most important **Factors of Influence**.
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.



Sealings & Fillers of Construction Joints in Europe 2020

Market by

Product Groups

Sealants

Acrylic

Silicone

Hybrids/MS-Polymer

Others

PU Foams

Adhesives

PU

Hybrids

Others

Joint Sealing Tapes

Types of Joints

Connection Joints

Construction Joints

Sealings of Folds (Wet glazing)

Distribution Channel

Building Material Trade / DIY

Wholesale

Specialized Companies

Customer Segment

Residential

Non-Residential

Application Types

Windows / Doors

Roofing

Curtain Wall Facades

EIFS

HVAC

Drywall / Plasterboard

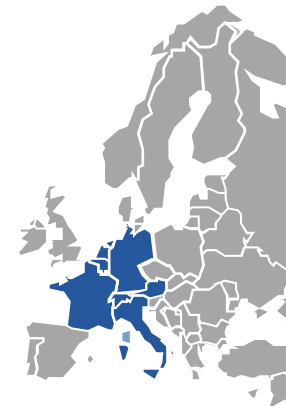
Flooring

Sanitary Engineering

Other Interior

Other Exterior

Available Countries



- Austria
- Benelux
- France
- Germany
- Italy
- Switzerland

For each segment the total market for the last two years and forecasts for the next three years are available in the study.

Product Groups	Quantity in L: Sealants, Adhesives, PU Foams. Quantity in m: Joint Sealing Tapes
Sealants	Sealing in the form of sealants that are capable of attaching to at least two surfaces, thereby, filling the space between them to provide a barrier or protective coating
Acrylic	A non-toxic building material based on acrylic polymers and is recognized by several other names including decorators caulk, painters caulk or decorators acrylic. They are traditionally used internally however some can be used externally.
Silicone	A substance based on silicone polymer (silicone rubber - around 45% which include following components: plasticizer silicone - makes the material elastic; vulcanizer, imparting viscosity to the material; silicone rubber (base); Adhesion primer - ensures the tenacity of the material with the surface; amplifier - provides strength).
Hybrids/MS-Polymer	MS-polymer sealants are made on the basis of modified silicone. Hybrids have chains (silyl) that modify both silicone and polyurethane sealants (MS stands for silyl-modified), combining some of the strengths of each. Their chemical profiles are better because they are solvent- and isocyanate-free .
Other	Include Polysulphide sealants (usually formulated as one- or two-component products which are based on sulfur-containing liquid polymers. Due to its special properties, it is used in places where it is necessary to prevent contact with various chemical liquids), bituminous and Butyl sealants (Bitumen rubber mastic sealant is a single component and cold apply solvent based bitumen rubber mastic joint sealant. The sealant on curing forms a tough and flexible seal. Butyl Sealant is formulated from a blend of butyl rubber and polyisobutylene).
Adhesives	Adhesives are bonding agents used to join materials by gluing. Materials which are composed by organic polymers in a liquid state when applied and become a solid state after further curing or hardening.
PU	Polyurethane adhesives are those glues that are made of urethane polymers with chemical based of isocyanate group, polyurethane adhesives are also known as elastic adhesives, due they have an extraordinary elasticity.
Hybrids	Materials based on MS polymers combine the best qualities of silicones and polyurethanes.
Others	Include the following adhesive types: acrylic, silicone etc.

PU Foams

Sealing in the form of spray foams for sealing joints, crevices, perforations and the like, that are used to insulate buildings and seal cracks and gaps

Joint Sealing Tapes

Sealing in the form of sealing strips/tapes

Types of Joints

Connection Joints

Joints between frame and masonry. A connecting joint is a movement joint between components with different materials or functions. This is understood as meaning, for example, the joints of window connections or the connecting joints on external doors. A window connecting gap is understood to be the interstices between the window and the masonry or the beam which are produced when a window is installed. This is usually a classic movement gap between components with different materials or functions

Construction Joints

Joints between masonry and masonry (Concrete, concrete parts, Unworked masonry, Natural stone ...)

Sealings of Folds (Wet glazing)

Gluing a pane into a frame; Adhesives and sealants are used for seam gluing, for gluing to the inner wooden frame and for inner glass seam sealing, as well as for the backfilling of glass retaining strips and channel bonding

Application Types	
Windows/Doors	Sealing for Windows and Doors industry.
Roofing	Sealing and bonding performance for various roofing applications; sealing and filling cracks in the roof, drainage systems, roofs of greenhouses.
Curtain Wall Facades	Sealing used for facades that comprise a frame onto which glazed or other infill panels can be fixed; sealings used for post and beam facades, elements facades, window ribbons, winter gardens.
EIFS	Exterior Insulation Finishing System ; Sealing for EIFS that is a cladding system that combines a finish with a layer of exterior insulation.
HVAC	Sealing used for heating, ventilation and air conditioning.
Drywall/Plasterboard	Solutions for standard plasterboard installation.
Flooring	Sealant and adhesive solutions for joints in floors, installing skirting boards.
Sanitary engineering	Bathroom and sanitary sealing solutions (sealing baths, shower trays and shower doors to bathroom surfaces), sealants-adhesives used for ceramic tile grouting .
Other Interior	Filling joints and cracks between concrete joints; sealing seams between structures, repairing cracks in interior surfaces (inner corners of walls, boundaries between walls and ceilings).
Other Exterior	Sealing used for other facades (e.g. Rain screen Cladding Facades, Sandwich Panels and other facades out of "concrete", facing bricks) , for balconies etc.

Distribution Channels

Building Materials
Trade/DIY

Large hardware stores that sells directly to the consumer and craftsmen, for example: Hornbach, Obi.

Wholesale

Wholesalers purchasing merchandise from manufacturers or other suppliers and these continue to retailers, industrial users or other institutions.

Specialized Companies+Online

Direct sales to specialized or construction companies, which deal with installation, e.g. floor, window, door installation; direct distribution comprises from online Sales via webpage, purchases at company stores/sites shops online sales.

Customer Segments

Residential

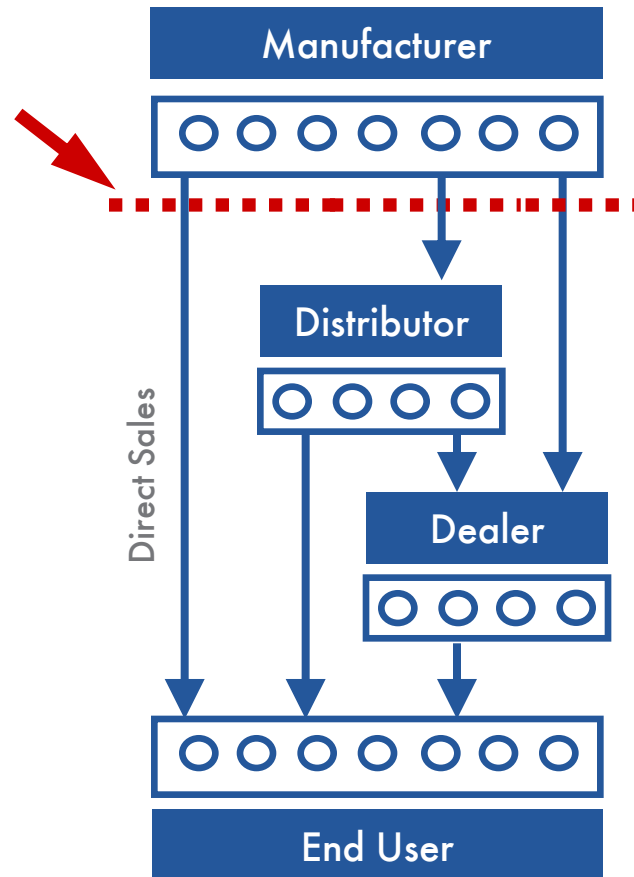
Residential construction including one- and two-family houses as well as multi-store residential buildings not exceeding 25 meters.

Non-Residential

Non-residential construction, e.g. Buildings for education, health, industry, warehouse, office, commercial, agricultural and other purposes.

Interconnection measures the total sales at street prices without VAT per branch to the first buyer

Sales are segmented by the first distribution partner.



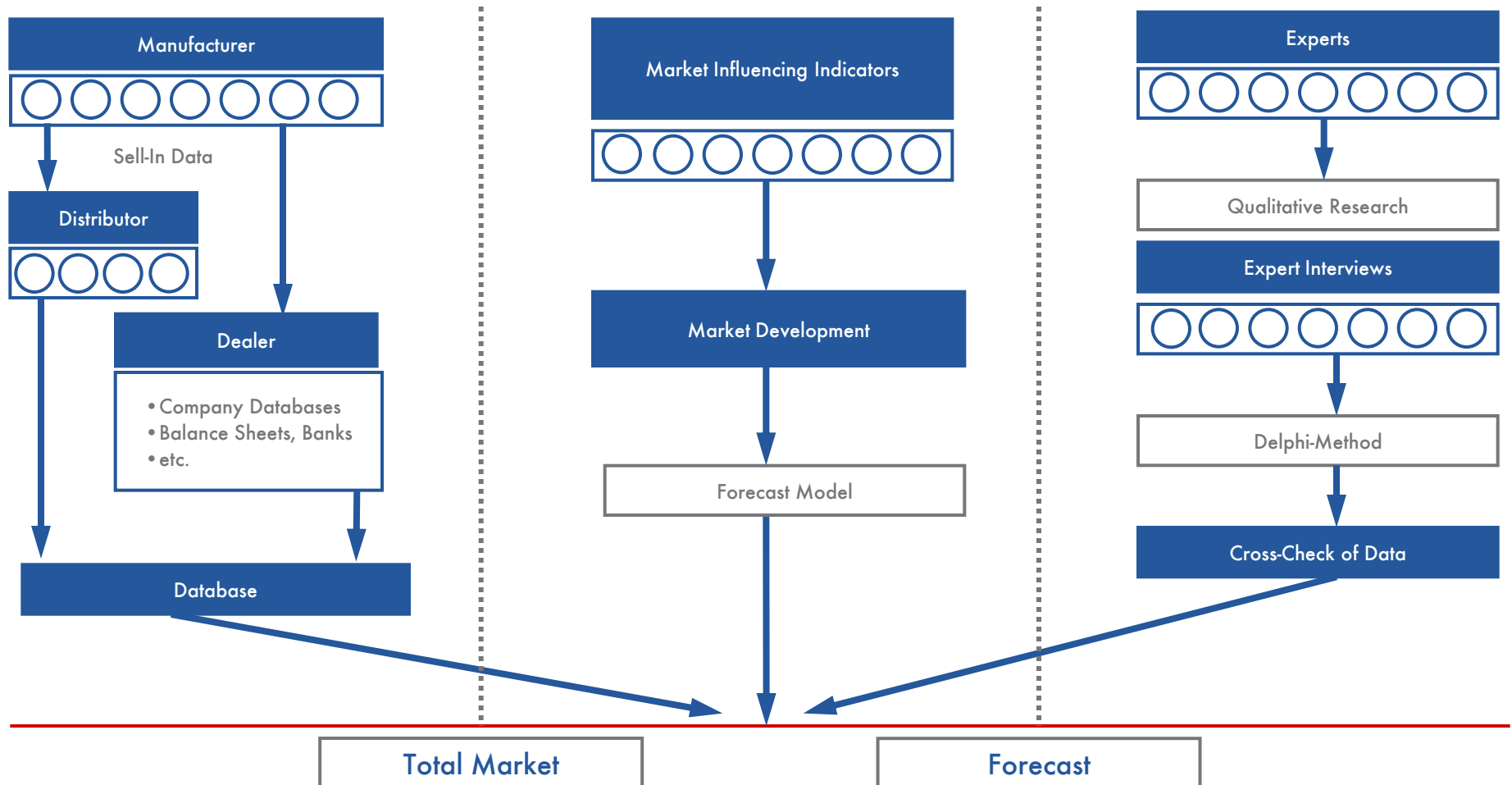
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

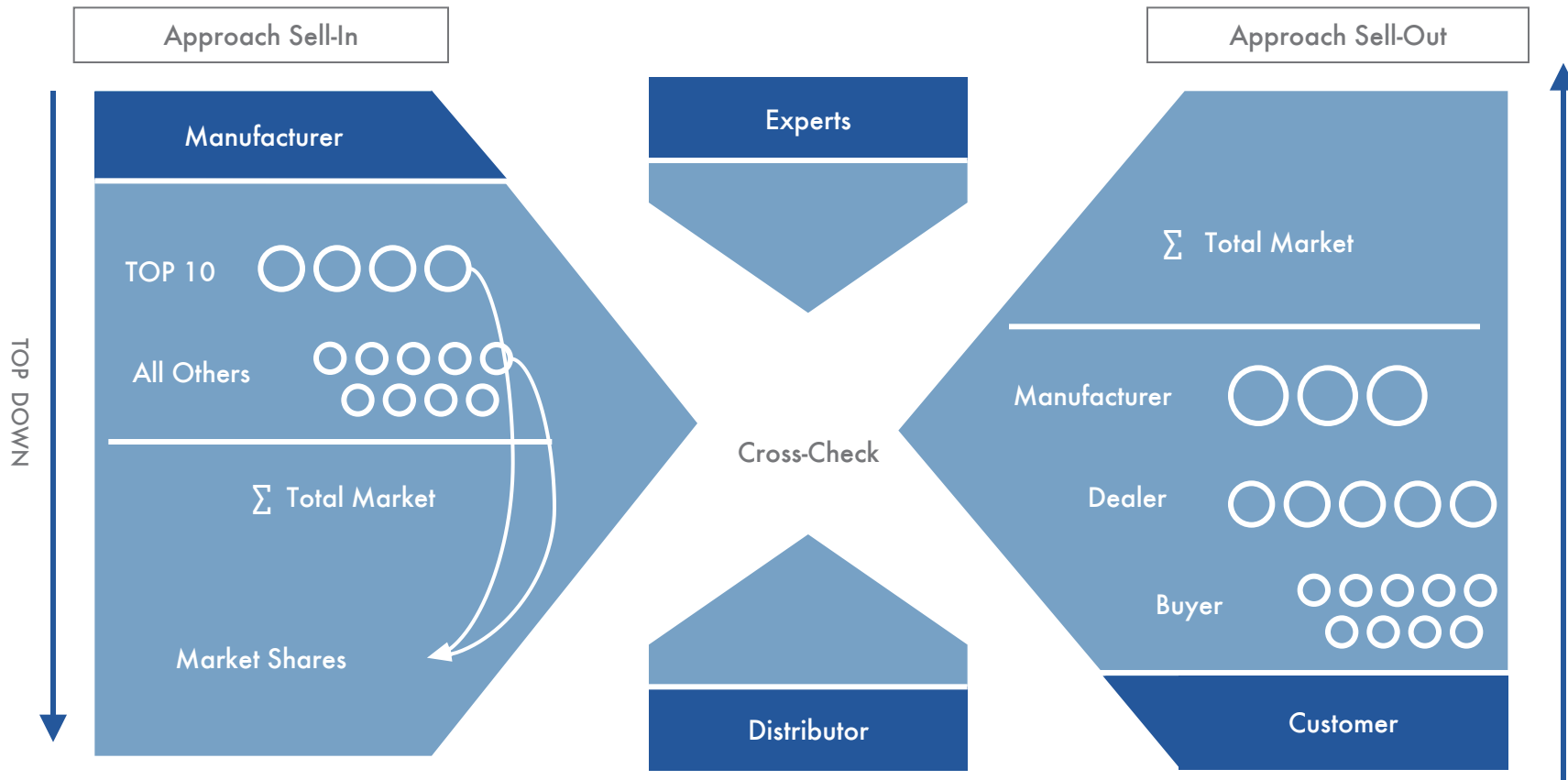
Methodology



Data of Manufacturers Aligned with Market Calculation

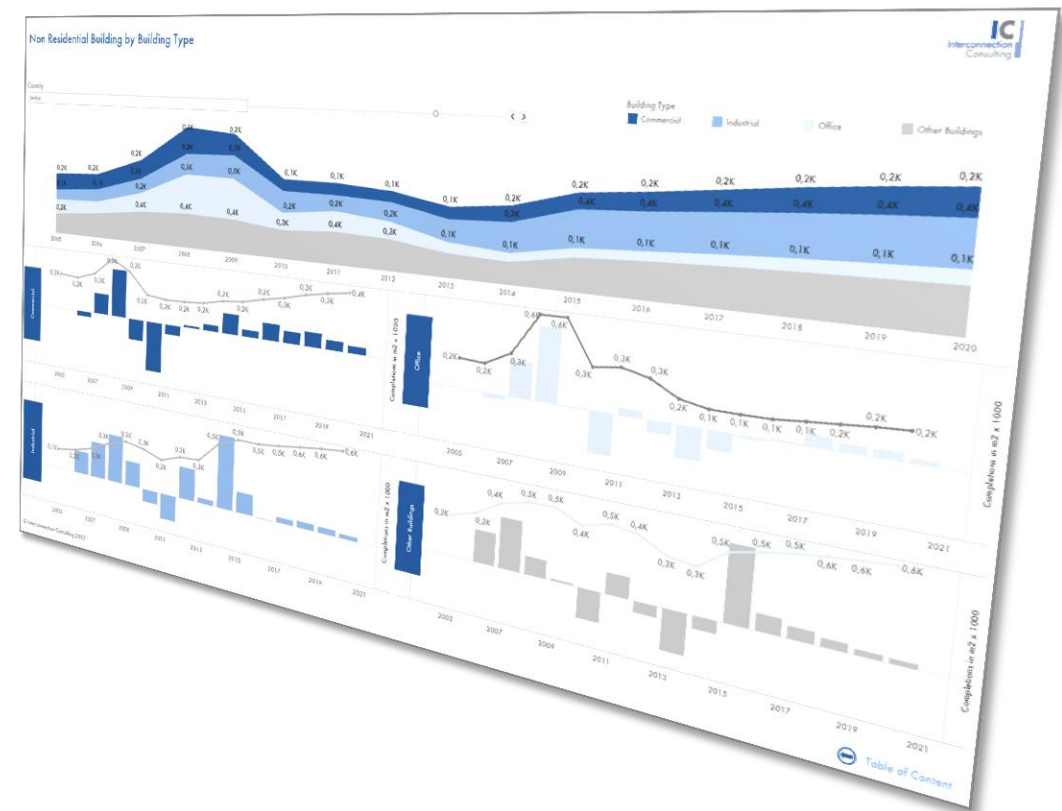
Description Structure of Survey Methodology

Methodology



Online Tool with Interactive Dashboards Presenting the Data

- We provide you also the possibility to implement all data in a dashboard solution based on Tableau.
- Together we will define what the final Tableau-Cockpit should look like to present you the data in the most efficient way for your work.
- In course of a subscription of our reports, fees for the dashboard creations will only occur in the first year. In the subsequent years the updated market data will automatically be uploaded in the software.



Your Benefits at a Glance

A picture says more than 1000 words

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

Interactive Dashboards
Updates annually

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

Easy online accessibility

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



Investment Plan for Your Market Research

	Subscription *	Single Issue	Scale of Discounts	
Single Region	€ 2.450,-	+25% for Single Issues	€ 6.000	-10%
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	Other countries on Request			
			Switzerland	
			Benelux	

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*** In case of purchase exceeding € 5.000,- (netto), 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 € 500,-.

The purchase of minimum 2 countries possible.

"IC is a permanent partner of ours and provides helpful data for decisions."

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe







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

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