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we show you the way

www.interconnectionconsulting.com

IC Market Tracking® 2016 Seals and Gaskets in

Germany
France
Italy
Spain
United Kingdom



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
 - Product Groups and Application
 - Distribution Channels
 - Company Profiles
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.





IC Market Tracking® Seals and Gaskets 2016

Germany

France

Italy

Spain

United Kingdom

Product Groups

Contact Seals

Static

Sheet Gaskets

Profiled Gaskets

O-Rings

Others

Dynamic

Hydraulic & Pneumatic Seals

Radial Shaft Seals

Compression Seal Fitting

Mechanical Seals

Others

Contactless Seals

Pressure Activated Seals

Others

Application

Automotive Industry

Commercial Vehicles & Transportation

Machines

Industrial Plants

Chemical Industry

Pharmaceutical & Food Industry

Energy Generation/ Raw Material Sourcing

Construction Industry

Oil & Gas

Marine Industry

Other Markets

Distribution Channel

Direct

Indirect

For each segment the total market and market shares of the top players in the last two years and forecasts for the next three years are available in the study



Definition and Demarcation

Product Groups

Contact Seals

Static

Sheet Gaskets

Sheet of material has the gasket shape "punched out" of it. This leads to a very crude, fast and cheap gasket.

Profiled Gaskets

Used to seal the windows and doors (Stop-, Glazing and Middle seals) as well as gates, for element- and jamb-bolt-constructions in building façades; for applications in noise insulation; Special applications, e.g. mineral oil resistant tank tensioning straps

O-Rings

Mechanical gasket in the shape of a torus; it is a loop of elastomer with a round cross-section, designed to be seated in a groove and compressed during assembly between two or more parts, creating a seal at the interface.

Others

Dynamic

Hydraulic & Pneumatic Seals

Fluid power seals. Hydraulic seals are required to withstand extreme temperatures and physical wear and tear. Pneumatic seals are any of a class of seals used in applications including rotary or reciprocating motions.

Radial Shaft Seals

Are used to seal rotary elements, such as a shaft or rotating bore

Compression Seal Fitting

Also known as a sealing gland, is intended to seal some type of element (probe, wire, conductor, pipe, tube, fiber optic cable) when the element must pass through a pressure or environmental boundary.

Mechanical Seals

Type of seal utilized in rotating equipment, such as pumps, mixers, blowers, and compressors. When a pump operates, the liquid could leak out of the pump between the rotating shaft and the stationary pump casing.

Others



Definition and Demarcation

Product Groups

Contactless Seals

Pressure Activated Seals

Provide high confidence sealing, eliminates costly leaks and provide a solution for fugitive emissions. For Example: Labyrinth Seals, Magnetic liquid sealing, Air purge system, etc.

Others

Distribution Channel

Direct

Sales which are not to the end consumer (e.g. Sales to retailers, industrial, commercial, institutional, or other professional business users or to other wholesalers)

Indirect

Direct Sales to industrial consumer without interference of any third party



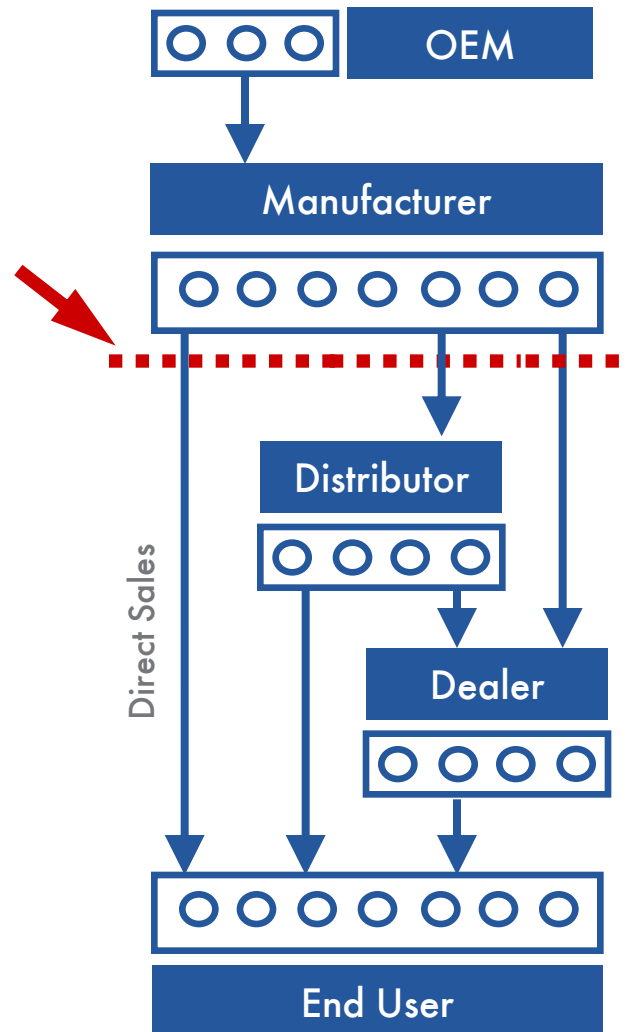
Definition and Demarcation

Application	
Automotive Industry	Sealing systems for Engine, Turbocharging, Fuel, Transmission, Driveline, Steering, Suspension, Climate, Electrification, Brakes; Vibration Control: Powertrain, Drivetrain, Suspension, Chassis; Filtration: Cabin Air Filtration, etc.
Commercial Vehicles & Transportation	Serving all types of commercial vehicles from a landing gear mechanism of an airplane to a heavy duty diesel engine: Aerospace, Agriculture, Commercial, Material Handling, Railway, Truck and Bus, etc.
Machines	Applications for machine tools, health and safety equipment, hydraulic presses, injection moulding, Machine Tools, etc.
Industrial Plants	Pulp and paper production, Yarn and fabric formation and decoration, Other Production Lines, Tunnel boring, underground mining, Steel mills, aluminium mills, non-ferrous mills, Fluid Handling, Fluid Power, Plant Equipment etc.
Chemical Industry	Parts, components and machinery operating with extreme temperatures and aggressive fluids in the Chemical industry.
Pharmaceutical & Food Industry	Parts, components and machinery operating with aggressive fluids while maintaining hygiene standards required for handling pharmaceutical products, food and beverage.
Energy Generation/ Raw Material Sourcing	Renewable electrical energy generation: wind, photovoltaic, water; Conventional electrical energy generation: coal, nuclear; Electrical distribution and transforming.
Construction Industry	Sealing used in construction industry (Sealings for doors, windows, (glass) facades, tunnel constructions, infrastructural pipes, sanitary systems, heating, climate control, elevators, security systems, etc.)
Oil & Gas	Oil-and gas platforms, cable and flowline protection solutions, pipes and plants for oil and gas distribution and transformina.
Marine Industry	Solutions for marine on/off-loading and safe berthing & mooring, Sealing and bearing solutions for on-deck machinery, Rubber-to-metal bonded antivibration mountings and suspension components for marine applications, Turnkey solutions to security issues around offshore, military and civilian installations, etc.
Other Markets	Consumer products(appliance, electronics, power tools, recreational), Medical equipment, etc.



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.



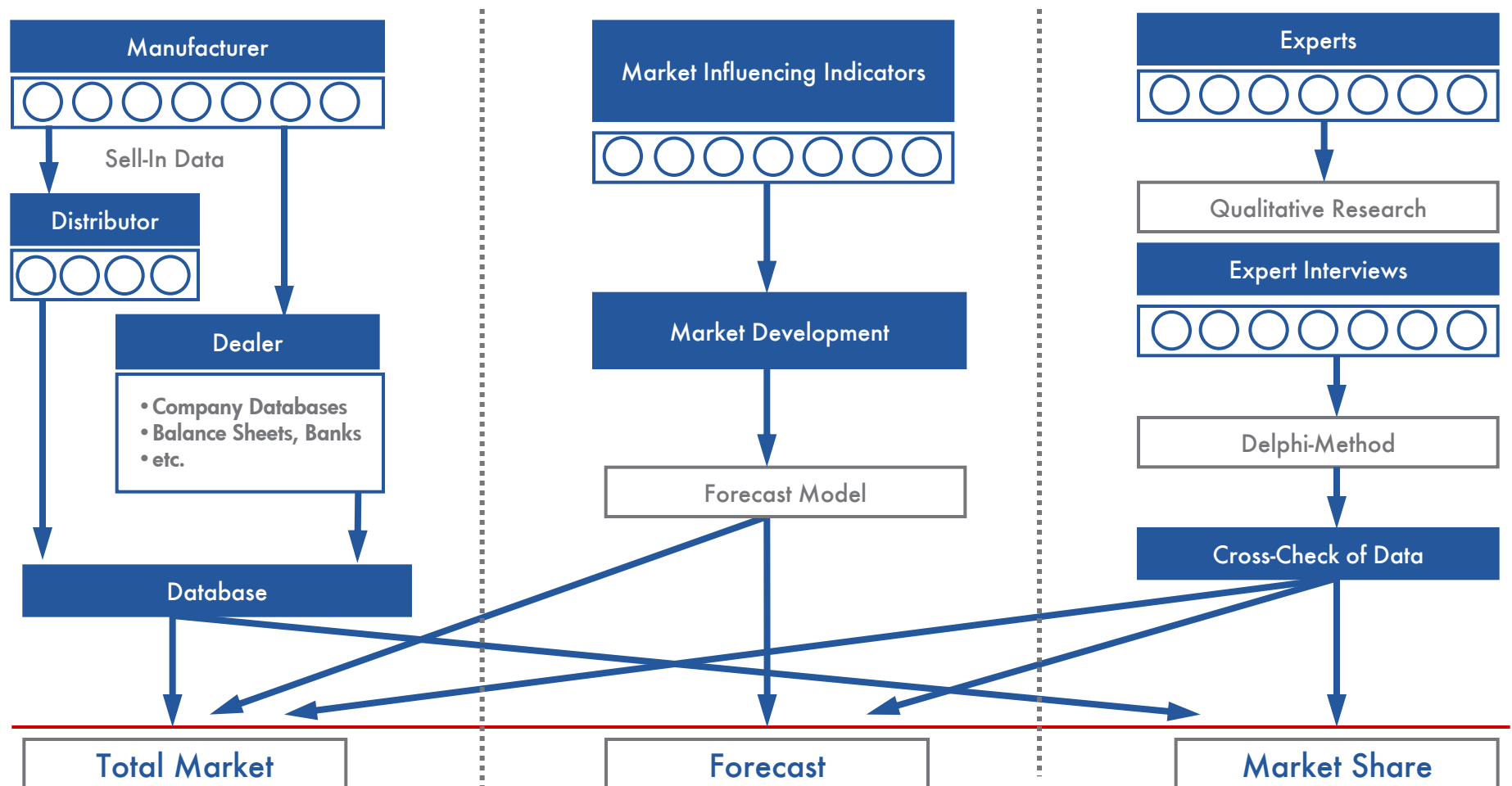
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

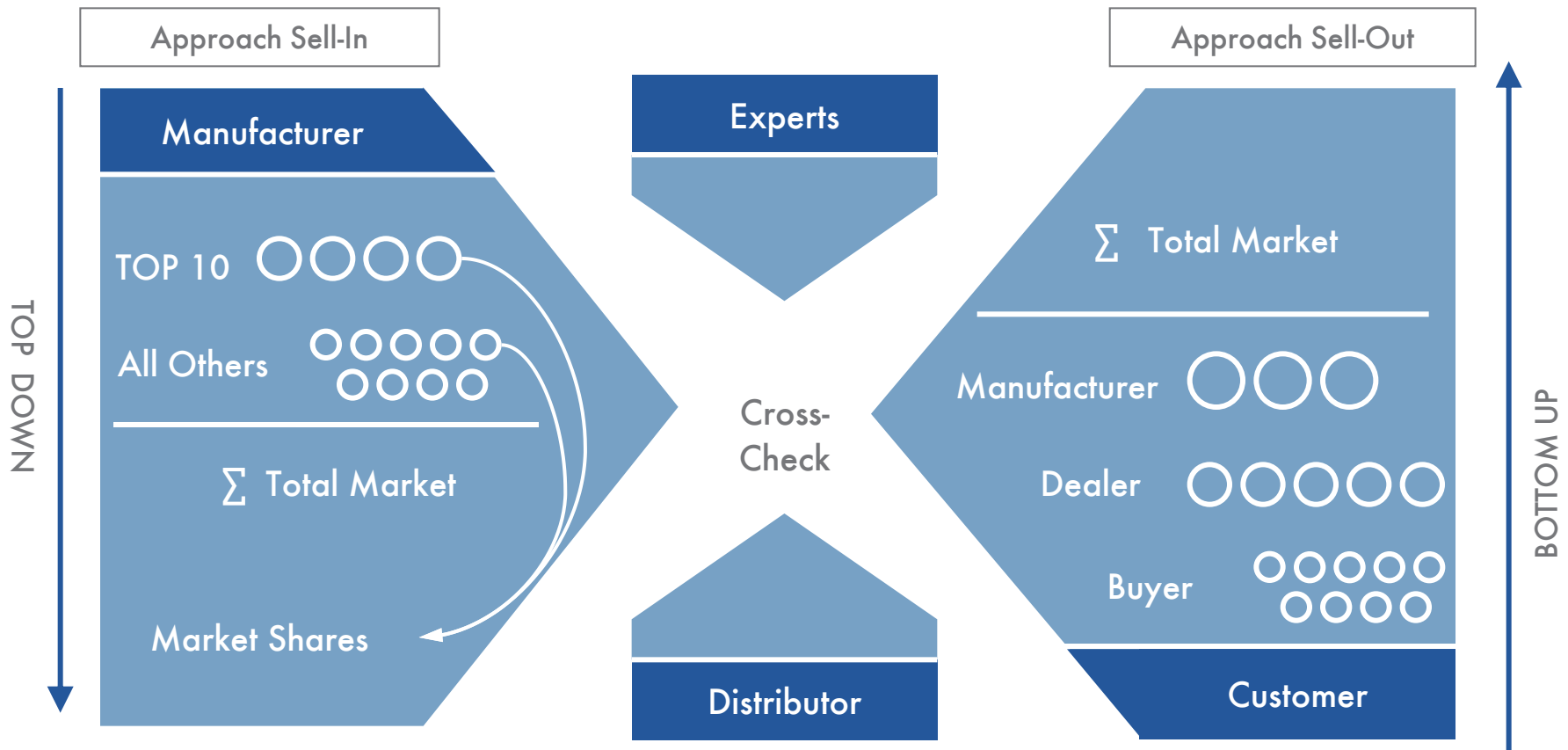
Description Structure of Survey Methodology





Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology





Contents of the IC Market Tracking® 2016 Seals and Gaskets

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 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.



Content of the Report*

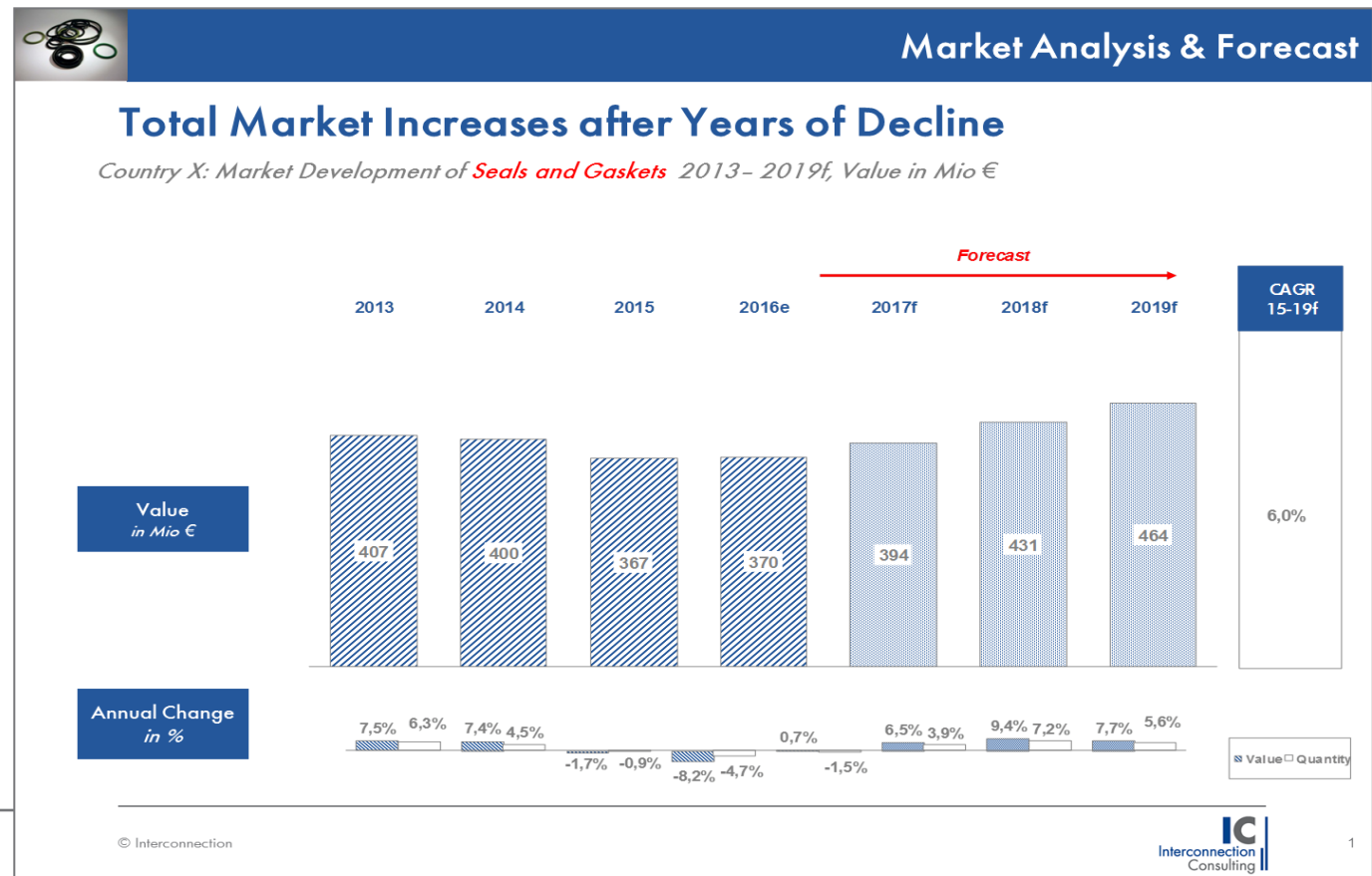
1. Executive Summary	(ca. 10 Pages)
2. Definitions & Methodology	(ca. 5 Pages)
3. Market Influencing Factors	(ca. 15 Pages)
4. Market Analysis & Forecast	(ca. 30 Pages)
5. Competition Analysis	(ca. 20 Pages)
6. Companies' Profiles	(ca. 15 Pages)
7. Tables, Figures & Facts	Pivot - Table

* Amount of pages per country



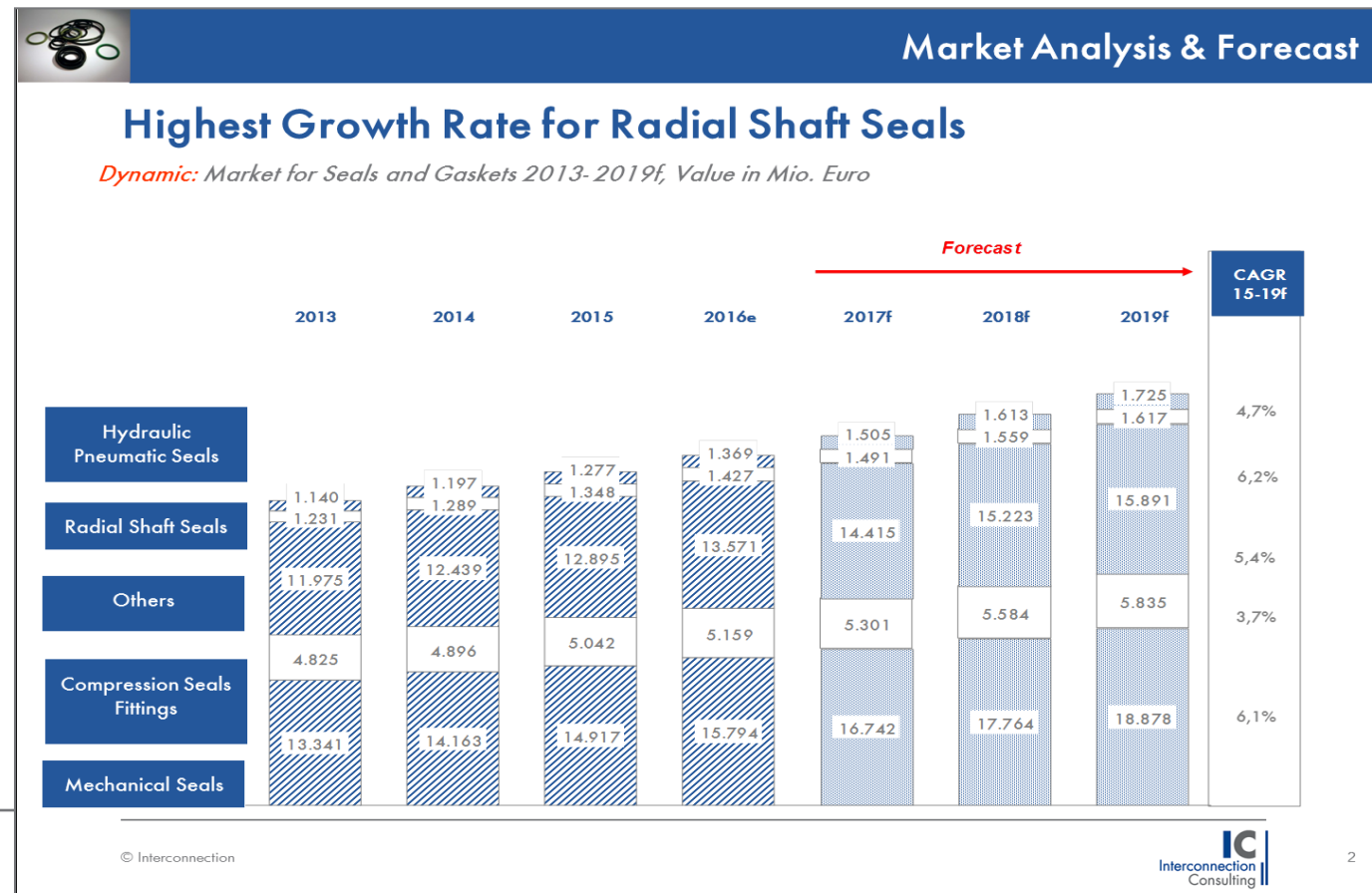
Total Market and Development

- Overview of the total market volume (in term of value) and forecasts for the next three years
- Overview of the market development by every segment and region
- This chart shows dummy figures



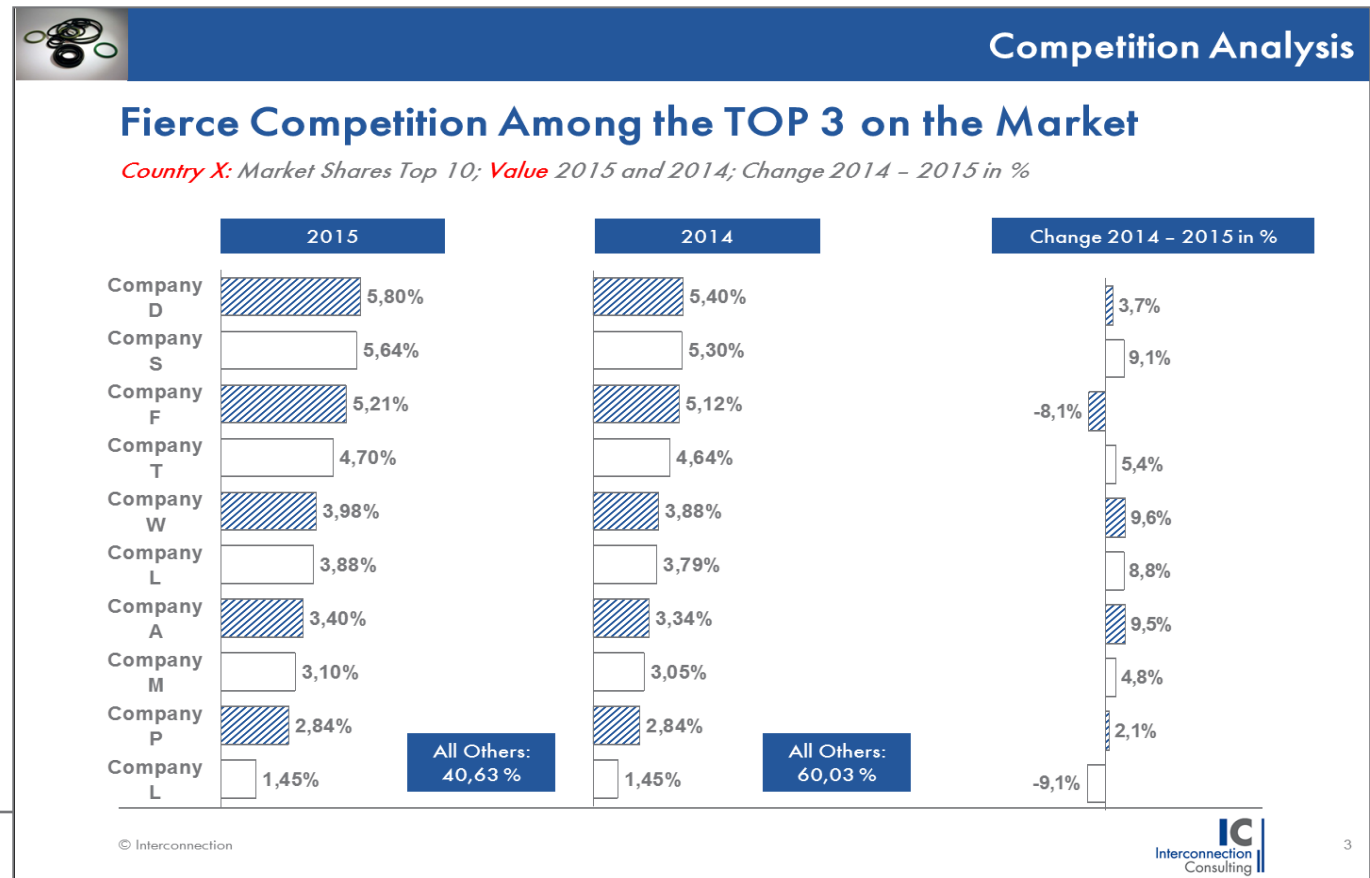
Overview of the Different Segments

- Analysis of the different product groups, applications and distribution channels, as well as market shares, including forecasts for the upcoming
- This chart shows dummy figures



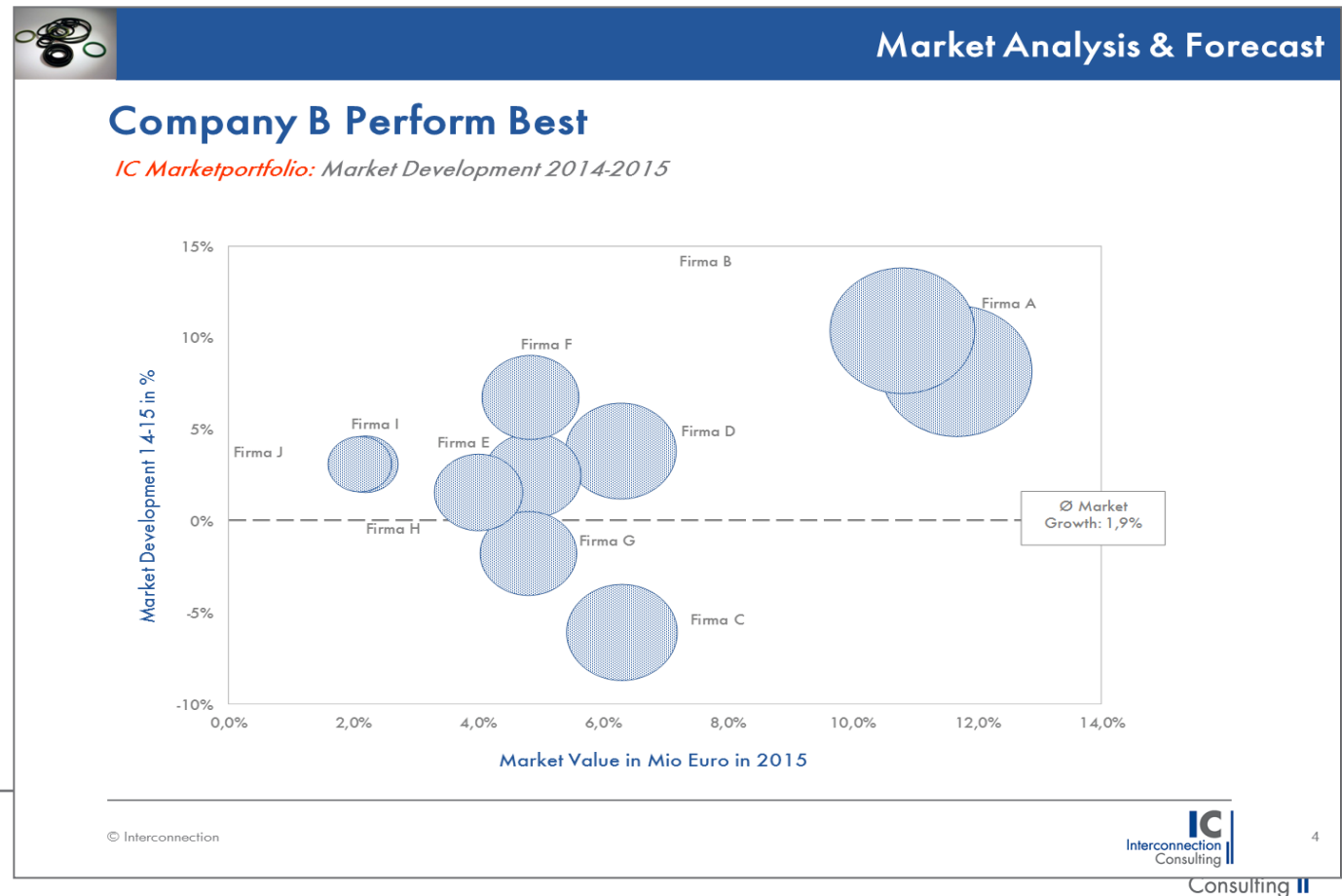
Competition Analysis of the Top Players

- Overview of the most relevant Players in the industry, as well as market shares and their development from 2014 to 2015 for each of the following segments:
- Product Groups, Application, Distribution Channel
- This chart shows dummy figures



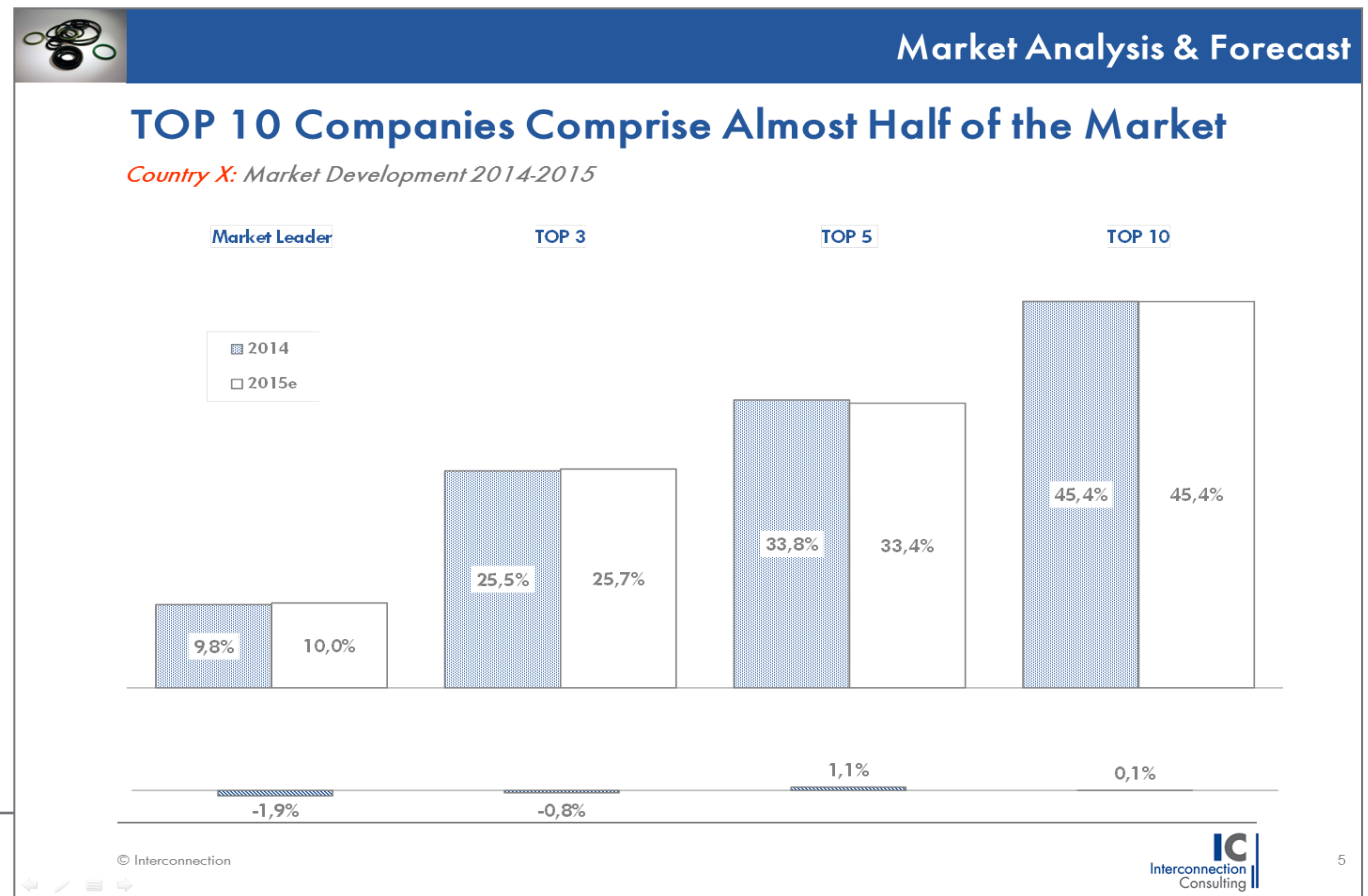
Competition Analysis and Development Dynamics

- This chart shows dummy figures



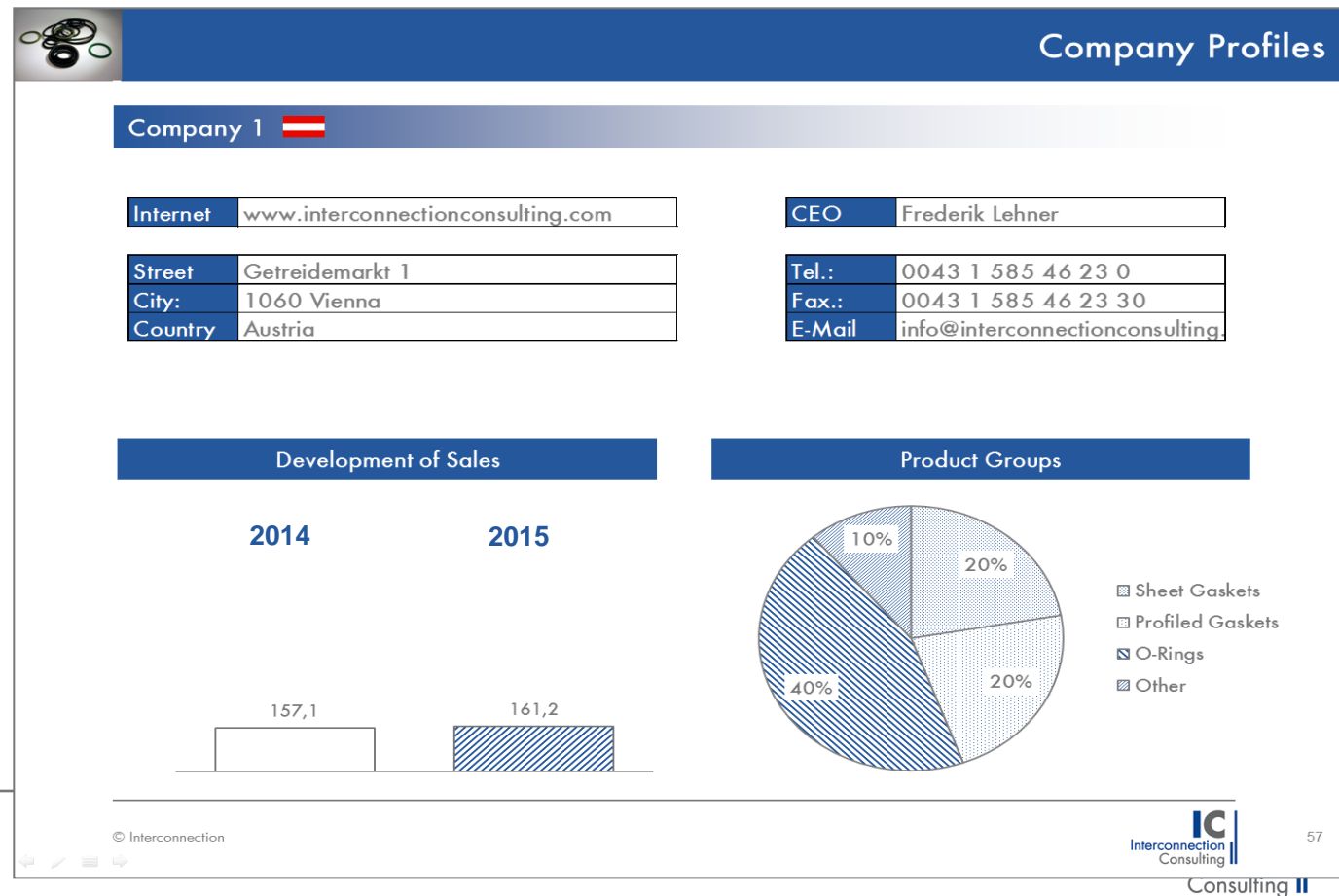
Market Concentration

- *Analysis of the market concentration among Top-Players in 2014 and 2015*
- *This chart shows dummy figures*



Company Profile

- Information about most relevant Players of the corresponding industry.
- Contact details and additional information about companies according to the segment
- This chart shows dummy figures



Pivot Table

- 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.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

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)
Ø 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)
Ø 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 Tracking® Seals and Gaskets 2016

		IC Subscription*	Scale of Discounts		
	Single Issue		€ 9.000	-20%	
Europe Total**	€ 13.500,-		€ 13.500	-25%	
Single Country	€ 4.500,-		€ 18.000	-30%	
			€ 22.400	-40%	
Available countries	Germany	France	Italy	Spain	UK

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** Price taking into account the scale of discount

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



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As a subscription customer you will receive the chosen report automatically each year at a reduced price. Additionally you will benefit from the following benefits:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**
- **Annually updated reports** on fixed dates
- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)
- **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 construction sector.
- 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 branch.
- 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 in the implementation of data in actions = in the development of marketing strategies.



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

Hr. Bernd Blümmers

Leiter Marketing, Saint-Gobain Glass, D-A-CH, Aachen (2002-2006)

Directeur Commercial et Marketing, Saint-Gobain Glass, Paris (2006-2010)

Directeur General, Saint-Gobain Solar Systems, Central Europe, Aachen (2010-

Selected Customers from the Construction Industry





If there are any questions please
feel free to contact us!

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General Information

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 60 per country
- Optional: Hard Copy

Price

- Single Issue: 4.500 €
- Europe Total: 13.500 €
- Hard Copy: 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, German on request

Introduction, Market Structure & Executive Summary

Definition and demarcation of product groups, applications 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.

Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

Market Structure

Regions:

Germany; France, Italy, Spain, United Kingdom

Application

Automotive industry, Commercial Vehicles & Transportation, Machines, Industrial Plants, Chemical Industry, Pharmaceutical & Food Industry, Energy Generation/Row Material Sourcing, Construction Industry, Oil & Gas, Marine Industry, Other Markets.

Product Groups

Contact Seals: Static (Sheet Gaskets, Profiled Gaskets, O-Rings, Other), Dynamic (Hydraulic & Pneumatic Seals, Radial Shaft Seals, Compression Seal Fitting, Mechanical Seals, Other); Contactless Seals (Pressure Activated Seals, Other)

Distribution Channel

Direct, Indirect

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 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.

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E-Mail: spiridonov@interconnectionconsulting.com



Yes, we would like to order the IC Market Tracking® Seals and Gaskets 2016

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

Industry/Region

- ☐ Germany
- ☐ France
- ☐ Italy
- ☐ Spain
- ☐ United Kingdom



Single Issue

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Order Form

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