

IC Market Tracking Tile Adhesives 2018

- Germany
- Austria
- Switzerland
- Poland
- France
- Great Britain
- Spain
- Italy

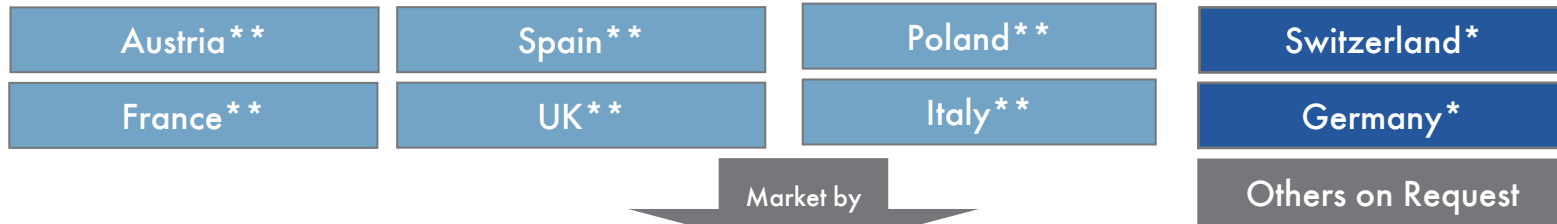
Your Benefits at a Glance

- ✓ Overview of the development of the **total market** and **individual segments**.
- ✓ **Market Forecasts** for all product segments for the next three years based on our economic **Indicator Model**.
- ✓ **Competition analysis with market shares** and development over the last two years , based on our econometric models and with respect to:
 - Total Market
 - Product Groups
 - Business Segments
 - Customer Segments
 - Distribution Channels
- ✓ Information about the most important **Factors of Influence**.
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.



IC Market Tracking® Tile Adhesives 2018

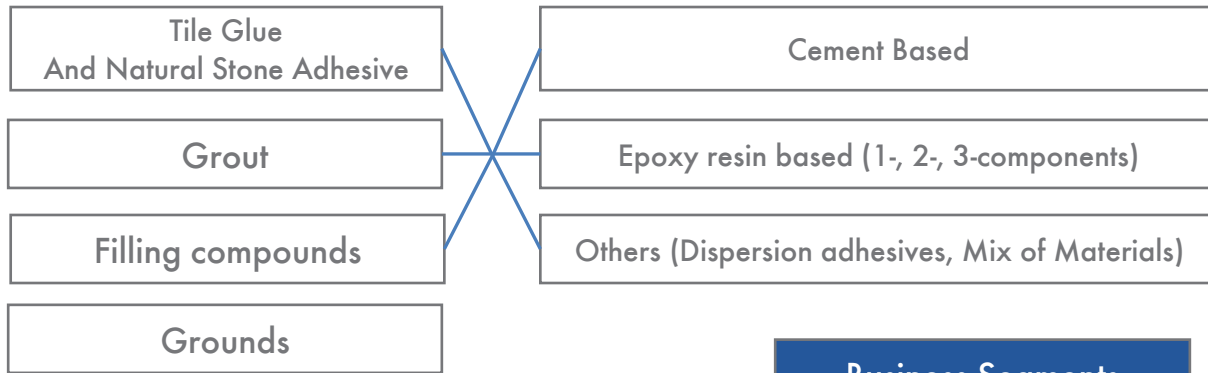
Market Structure



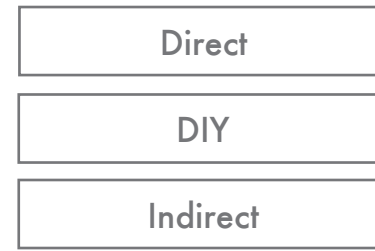
*Currently Available

**Upon Request

Product Groups



Distribution Channels



Business Segments



Customer Segments



Total market for the last two years and forecasts (for all product groups and segments incl. Business Segments) for the next three years. Also market shares of the top players (from 2016 to 2017) are available in the study.

Value

Revenue is stated in EUR 1,000. The values are always net sales (without list prices), including discounts.

Quantity

The Sales are measured in kilograms. We will try our best to deliver reliable numbers. Nevertheless, the value of sales may provide more meaningful information than sales in quantity.



Product Groups

Tile Glue
And Natural Stone Adhesive

Tile adhesives are used to attach tiles to the wall or floor in a thin-bed process. Natural stone adhesives are used for laying natural stone.

Grout

It is impermeable and frost-proof mortar, which is used for grouting of visible and facing masonry, but also in the field of tile laying.

Filling compounds

Used for surface repairs with a spatula, mainly for filling cracks.

Grounds

Flowable, mortar-like mass, which is applied to compensate for unevenness on soils and distributed evenly thin.

Cement Based

Cement-based adhesives are powder adhesives with a high content of cement. A special form of cementitious thin-bed mortar is the flexible adhesive. This plastic-coated cement mortar is used where a high adhesive force of the plastic (dispersion) is required, for example on old, fixed ceramic coverings and on "working" substrates such as dry screed or plasterboard.

Epoxy Resin Based
(1-, 2-, 3-components)

One-, two- or three-component synthetic resin adhesives based on polyurethane or epoxy resin are reaction resin adhesives;

Others
(Dispersion adhesives,
Mix of Materials)

Dispersion adhesives (water-soluble) are ready-to-use adhesives based on plastics. The glue is only used indoors and because of the long curing time only on walls.

Business Segments

New Construction

Tile, joint, spatula, soil and natural stone work in newly built buildings.

Renovation

Replacement or renovation of tile, joint, spatula, floor and natural stone work.

Distribution Channels

Direct

Direct sales to the end user by own sales staff, Internet or other.

DIY

Sales through large retail chains, warehouses or hardware stores.

Indirect

Wholesale and retail trade as well as all other forms of trade in goods sold by a third party.

Customer Segments

Residential

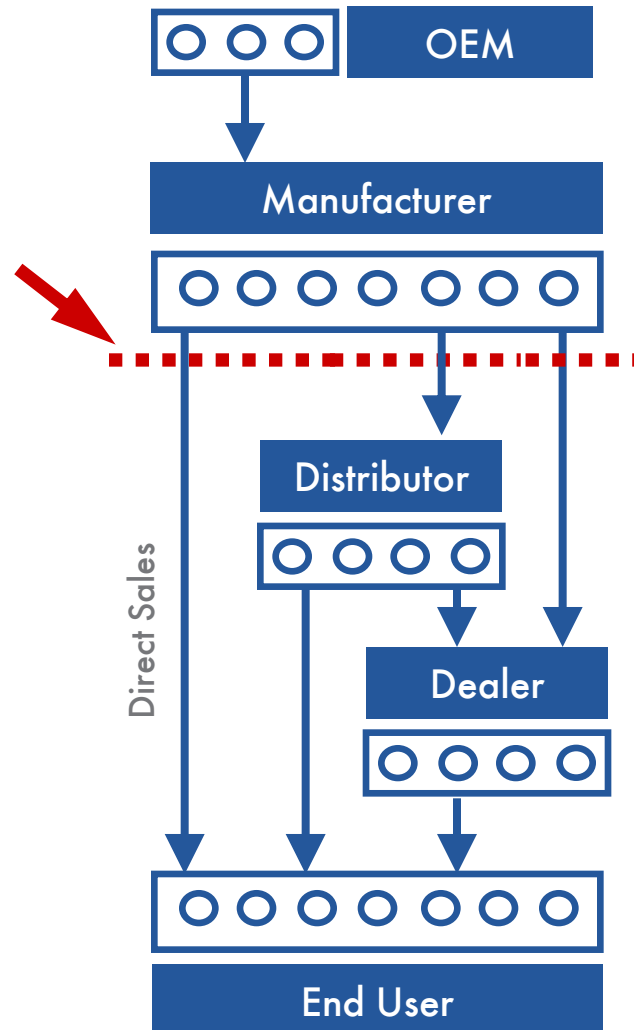
Residential construction including one- and two-family houses as well as multi-storey housing construction.

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 (without OEM)

Sales are segmented by the first distribution partner.



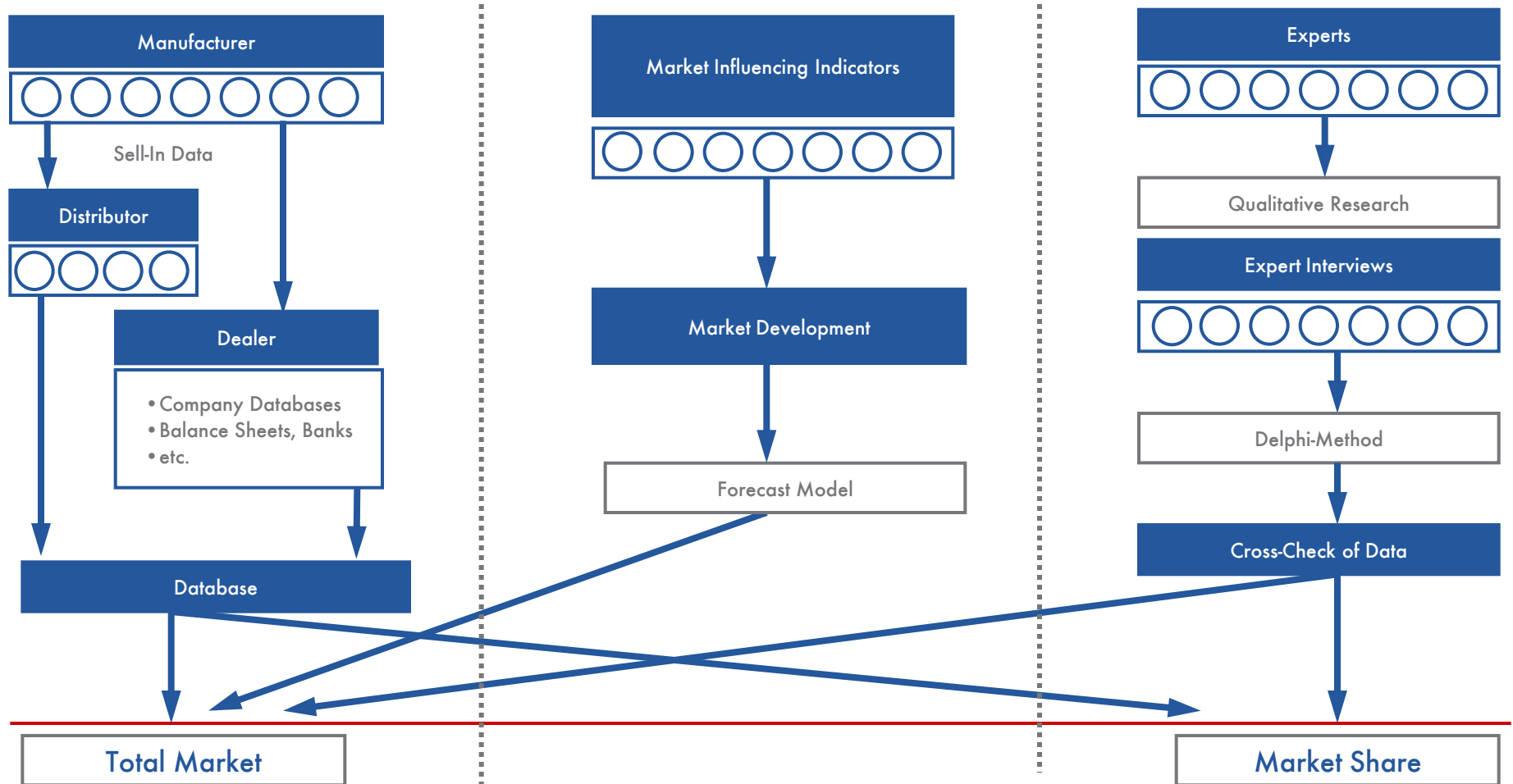
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

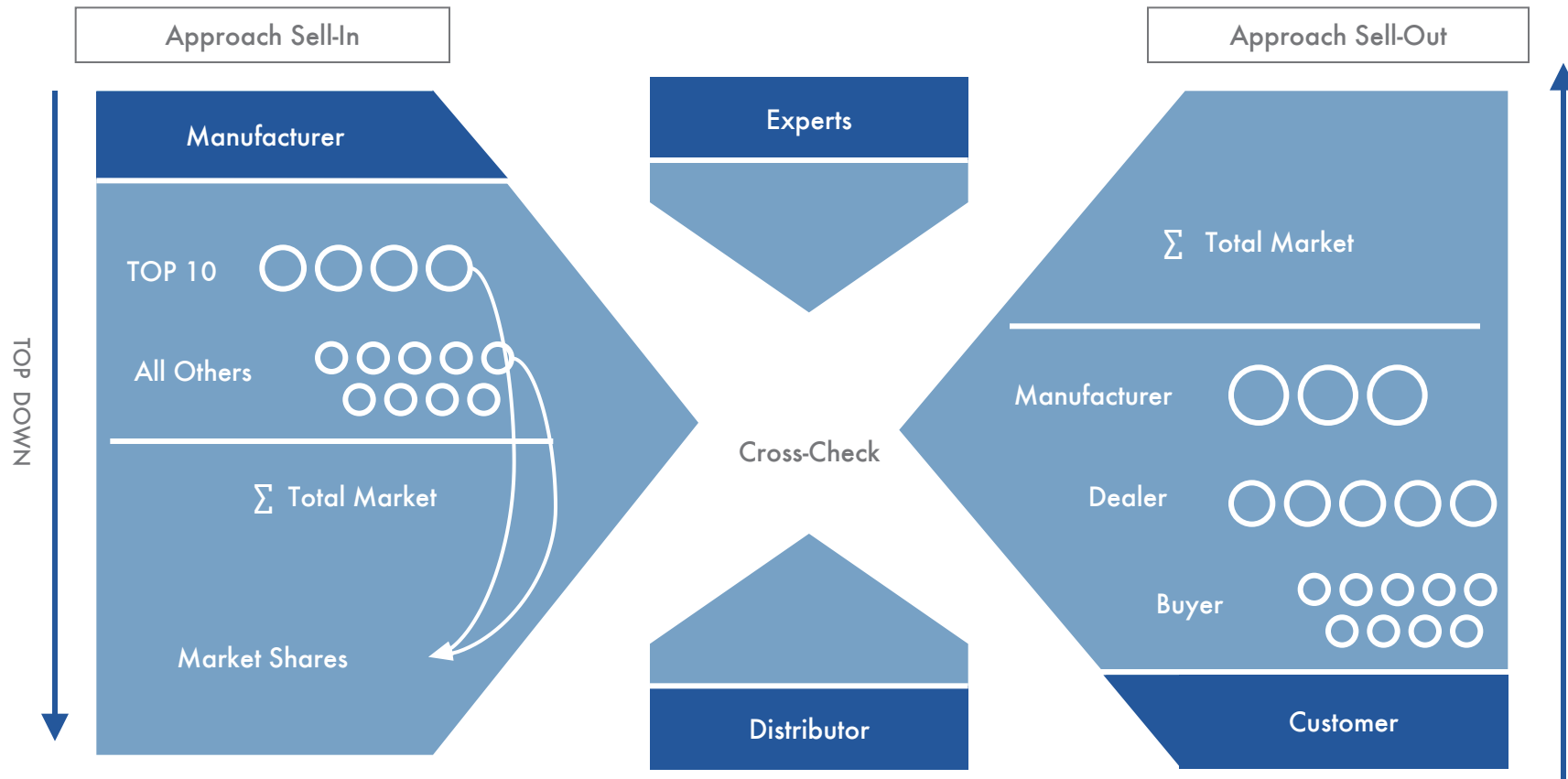
Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

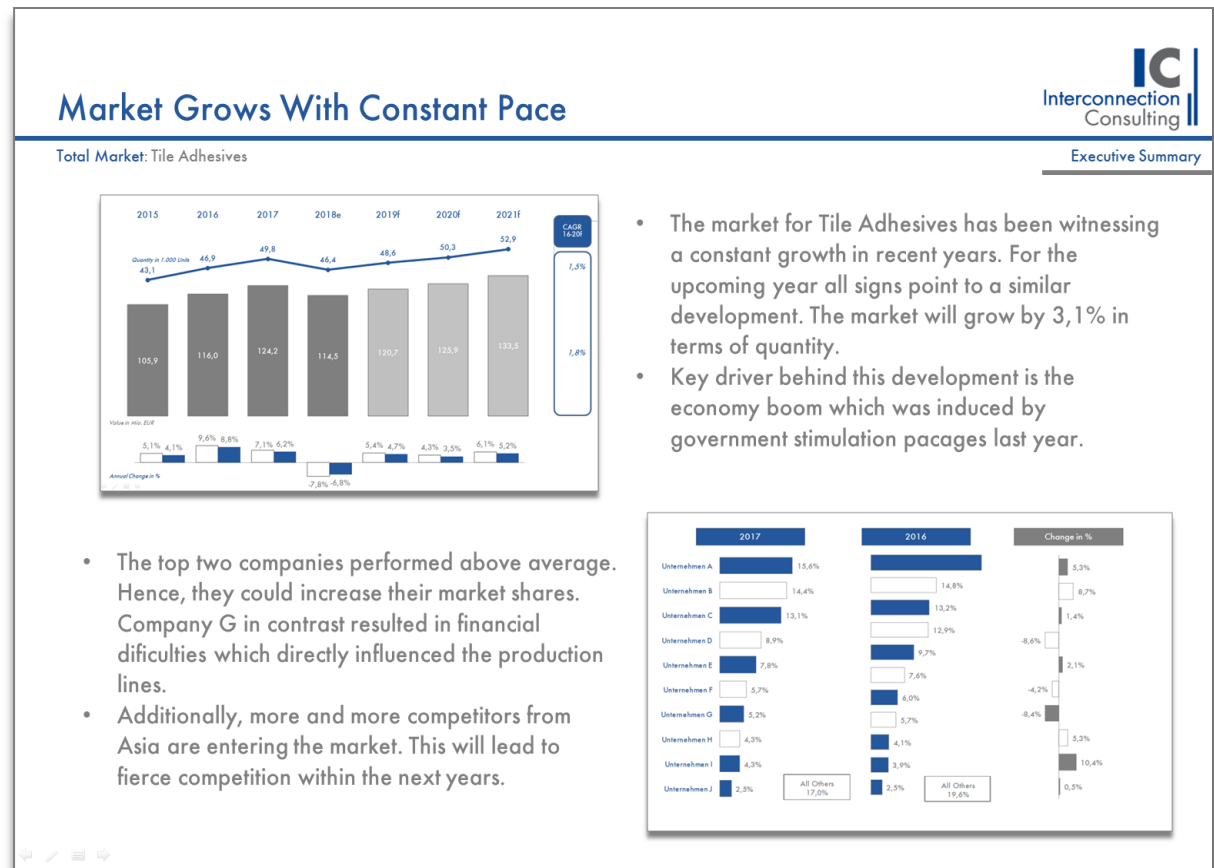
Methodology



- The **Introduction** shows 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.
- **Competitive Landscape Analysis** shows market shares of the top manufacturers for each region and for each segment for the last two years.
- **PivotTables**: Here you will find a powerful and interactive tool for the further processing of our data for your personal market research needs.

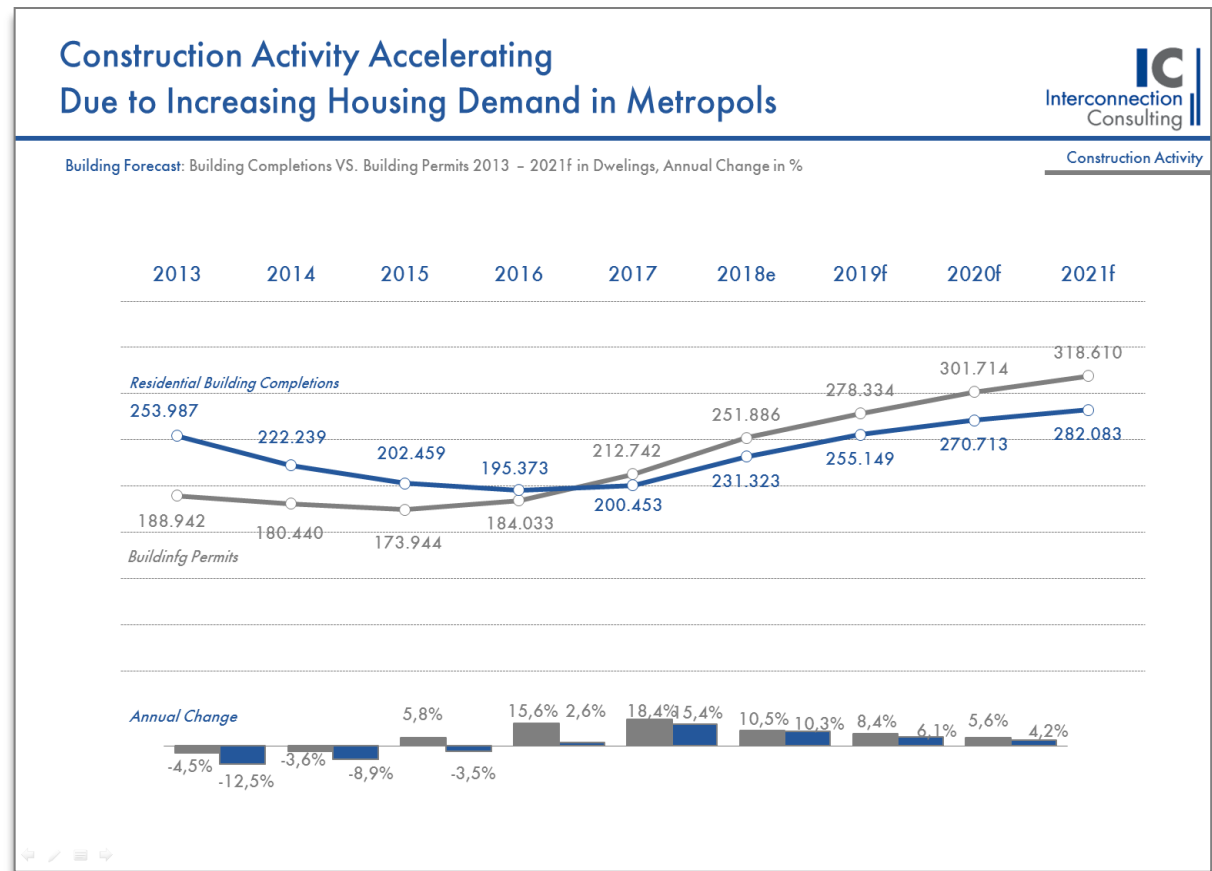
Market at a Glance – the Executive Summary

- The study starts with giving all relevant information in a precise manner
- The IC-Opportunity Index shows the market potential of a given country in comparison to all other markets
- This chart shows dummy figures



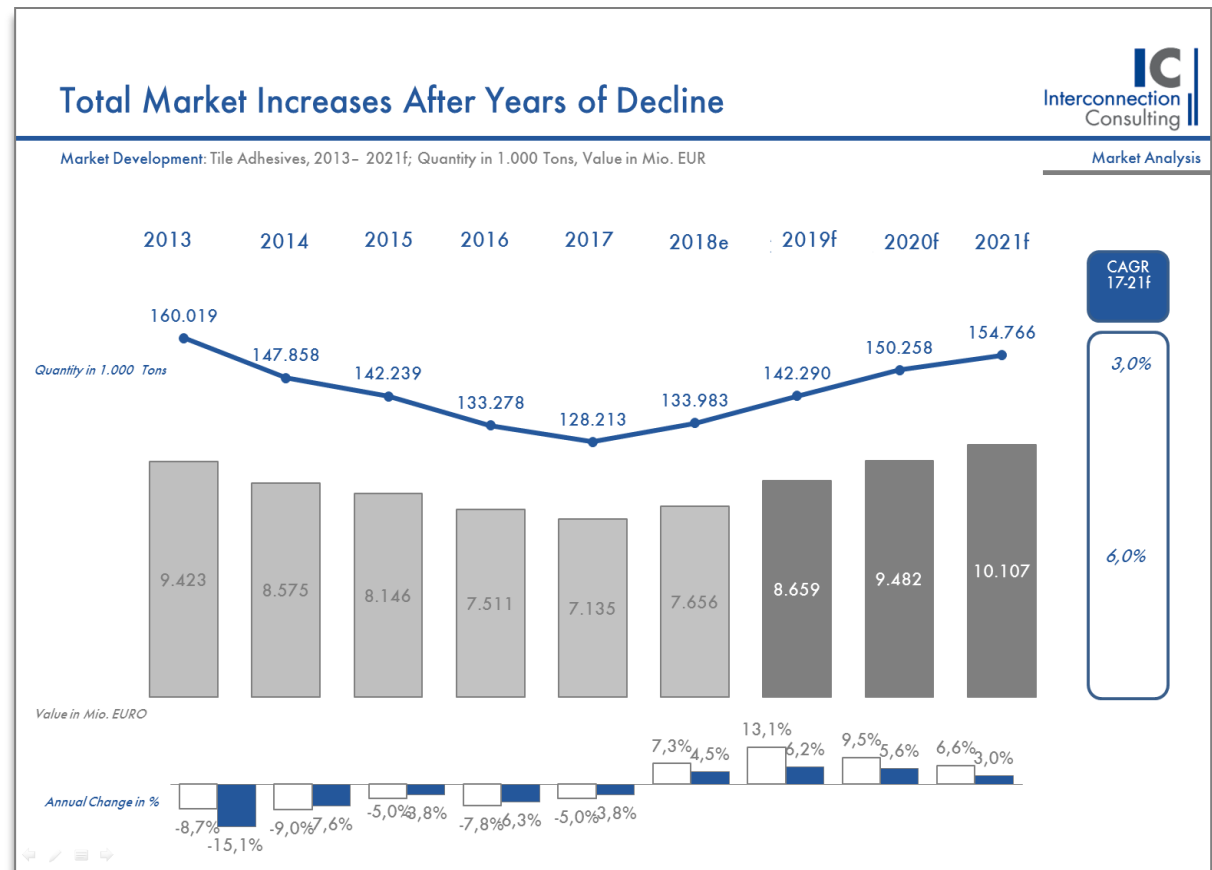
Market Environment Data of our Forecasting Model

- The data for the market environment consists of main factors such as construction data, demography, income statistics and sentiment.
- This chart shows dummy figures

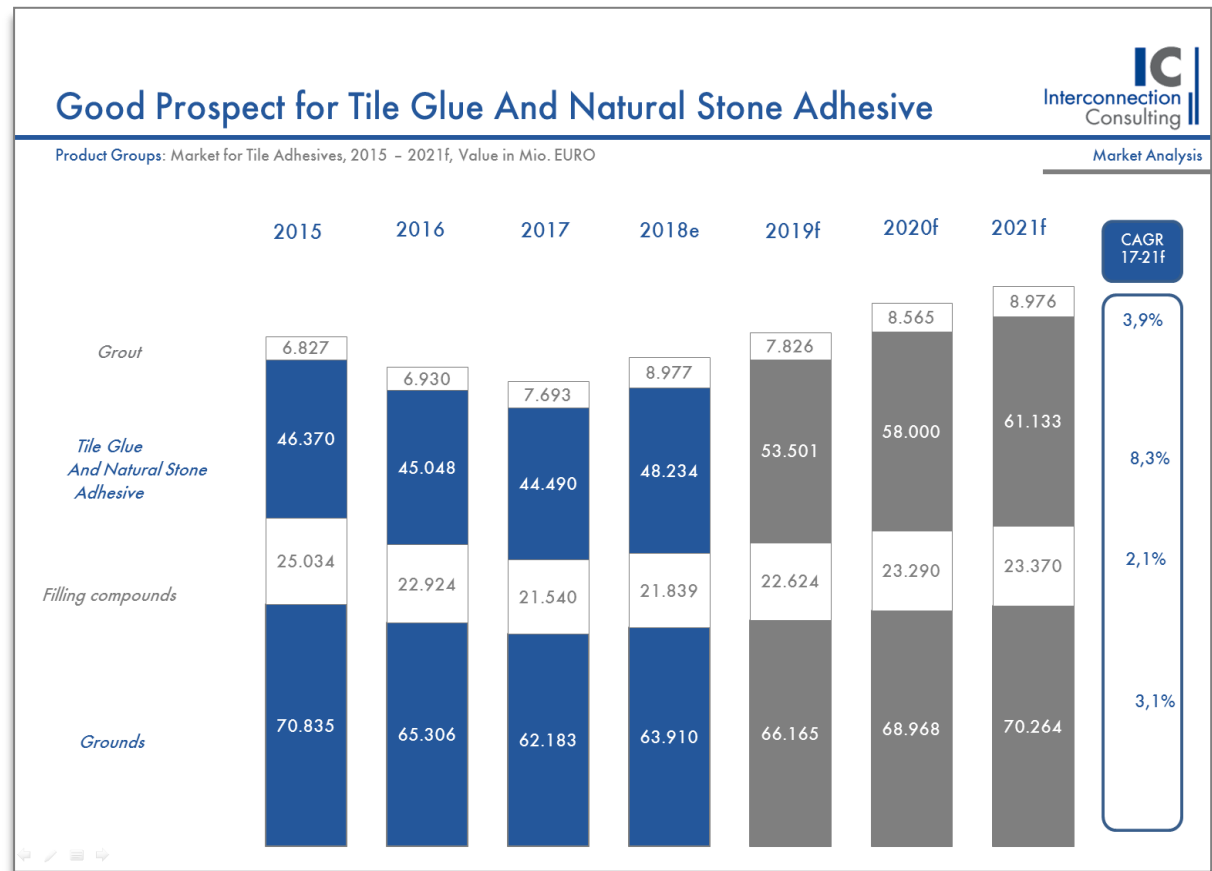


Total Market Development and Forecast

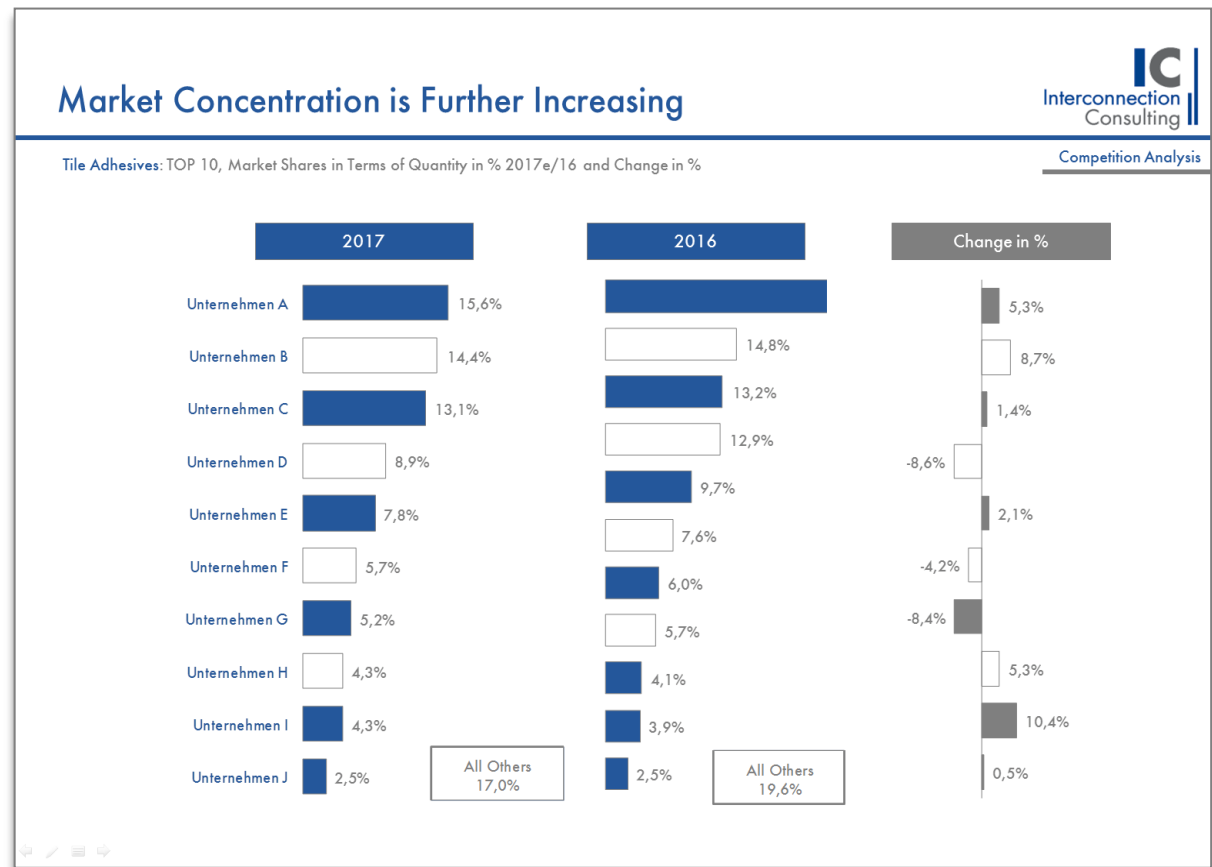
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- This chart shows dummy figures



- Performance overview for each Distribution Channel by year
- Forecast for the upcoming three years
- This chart shows dummy figures



- ❑ Detailed representation of the most important companies in the market under investigation by means of market share changes *BCG* portfolios etc.
- ❑ This chart shows fictitious numbers.



- 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)
∅ 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 - #	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

Investment Plan for Your Market Research

	Single Issue	IC Subscription *	Scale of Discounts	
All 8 Regions **	€ 16.520,-		€ 8.000	-10%
Single Country	€ 2.950,-		€ 14.000	-25%
			€ 22.000	-30%

Available
countries

Germany

Austria

Switzerland

Poland

France

Italy

Spain

United Kingdom

Others on Demand

* **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

* **Currently Available**

** **Upon Request**

Your Advantages as a Subscription Customer

Please choose between Subscription*
or Single issue

Subscription* **Single Issue**

As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to 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 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


Webverstärker

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

Selected References of our Market Reports

" Long-term experience and deep understanding of DIY stores make the quality of IC studies reality."

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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we show you the way

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 80
- Optional: Hard Copy

Preise

- All Regions: 16.520,-€
- Single Country: 2.950,-€

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

Aufbau der Studie

Language of the report

English, Other languages on request

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.

Competition 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.

Marktstruktur

Countries

Germany, Austria, Switzerland, Italy, Spain, France, Great Britain, Poland

Product groups

Tile Glue and Natural Stone Adhesives, Grout, Filling Compounds, Grounds – Cement Based, Epoxy Resin Based (1-,2-,3- Components), Others (Dispersion Adhesives, Mix of Materials)

Distribution channels

Direct, Indirect, DIY

Business segments

New Construction, Renovation

Customer segments

Residential, Non-residential

Methodik

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.

FAX: +43 1 585 46 23 30

E-Mail: hudak@interconnectionconsulting.com



Yes, we would like to order the
IC Market Tracking® Tile Adhesives 2018
(Please, print out the order form and mark your desired products)



West Europe

- Germany
- Austria
- Switzerland
- Poland
- France
- Italy
- Spain
- United Kingdom
- All 8 Regions

Single Issue

- 2.950,- EUR
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- We would like to order additional hard copies, each for € 150
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From: 14.000,- EUR 25%

From: 22.000,- EUR 30%

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