

**IC Market Tracking®**  
**Electric Hand Tools in**  
**Europe 2018**

# 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
  - Price Ranges
  - Accessories
  - Power Supply
  - 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® Electric Hand Tools in Europe 2018

Germany\*\*

France\*\*

Switzerland

Italy

Austria

Benelux

UK

Spain

Czech Rep.

Poland

Others on demand

Product Groups	Price Range*			Accessories	Power Supply	Distribution Channels
	Economic	Hobby	Professional			
Screwdrivers	Up to 90€ / 91-240€ / From 241€			Drills	Battery Pack	Building Materials / DIY
Rotary Hammers	Up to 100€ / 101-300€ / From 301€			Saw Blades	Power Adapter	Specialized Dealers
Drilling and Impact Drills	Up to 70€ / 71-280€ / From 281€			Grinding Wheels		Others
Grinder / Polisher	Up to 60€ / 61-280€ / From 281€			Power Tool Batteries		
Angle Grinder	Up to 60€ / 61-250€ / From 251€					
Circular Saws	Up to 90€ / 91-500€ / From 501€					
Jigsaws	Up to 60€ / 61-200€ / From 201€					
Reciprocating Saws	Up to 70€ / 71-280€ / From 281€					
Milling Machines	Up to 300€ / 301-1000€ / From 1001€					
Sheet Metal Working Tools (Nibblers/Shears)	Up to 80€ / 81-550€ / From 551€					
Multifunctional Tools	Up to 90€ / 91-350€ / From 351€					

\*Price groups according to retail prices, for the rest of product group and the rest of the study we consider net manufacturing price –pg.4.

\*\*Currently available region

For every market segment we will analyze the overall market during the previous two years and additionally make a forecast for the next 3 years. Competition Analysis available for all product groups for 2016 - 2017.

## Product Groups

Screwdrivers	Machine used for turning screws, by fitting the end of the rod (can be flat or cross-shaped) on top of the screw, and rotate it.
Rotary Hammer	Tool usually used for "longer jobs", such as breaking the hard soil, start holes in concrete, removing ceramic tiles, drilling holes in bricks and so on.
Drilling and Impact Drills	Versatile tool, but used mostly to start holes and drive screws.
Grinder / Polisher	Grinding is divided in 2 steps: Plane grinding and fine grinding. Only after this 2 processes is the piece ready to be polished, which is also divided in 2 processes, diamond and oxide polishing. The machines differ in rotation speed, force and preparation time.
Angle Grinder	Tool with a rotating abrasive disc, commonly used for cutting, grinding and polishing intricate angles.
Circular Saws	Machine equipped with a round metal disc which has a sharp metal edge that is used for cutting different materials.
Jigsaws	Mechanical saw with a narrow steel blade, used for cutting complicated curves in different materials.
Reciprocating Saws	Machine equipped with a saw, that moves in a "push-and-pull" (reciprocating) motion allowing it to perform cuts.
Milling Machines	Machine with a rotating blade (milling cutter), that can be used to shape the materials by pressing the piece against the blade.
Sheet Metal Working Tools (Nibblers/Shears)	Cutting tool that can do small holes in metal by rapidly reciprocating a series of cuts.
Multifunctional Tools	Single tool that can be used for multiple purposes.

## Accessories

### Drills

Tool with an edge or cutting tip, used for making holes in hard materials.

### Saw Blades

Circular piece of metal with an hard toothed edge used mostly wood, but can cut metal and stone.

### Grinding Wheels

Wheel used for different abrasive cutting (grinding), made of small abrasive compounds.

### Power Tool Batteries

Battery that transmits power to the machine.

## Power Supply

### Battery Pack

Set of (preferably) identical batteries which are configured in a series, parallel or a mixture of both to provide the desired voltage/power density. The battery can be implemented on the machine or direct the power by cable.

### Power Adapter

Also called AC/DC converter, is a type of external power supply for electronic devices.

## Distribution Channels

### Building Materials / DIY

Stores that sell equipment and materials for bricolage projects and others.

### Specialized Dealers

Independent dealers (that may represent a single brand or more than one).

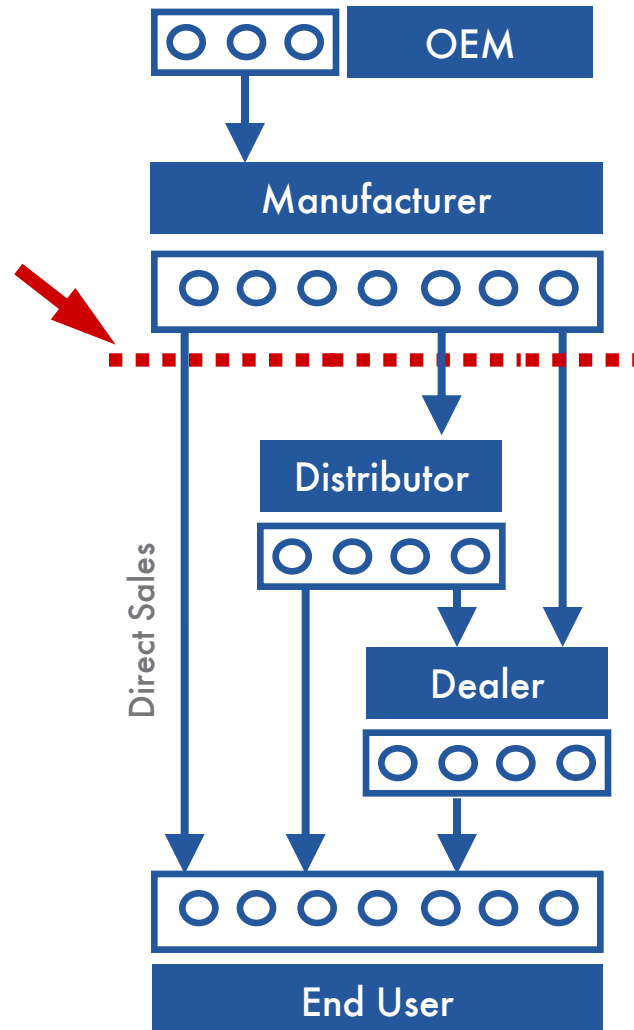
### Others

Other distribution channels (online, ...).

# Primary Survey of Manufacturers & Experts As a Basis

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.



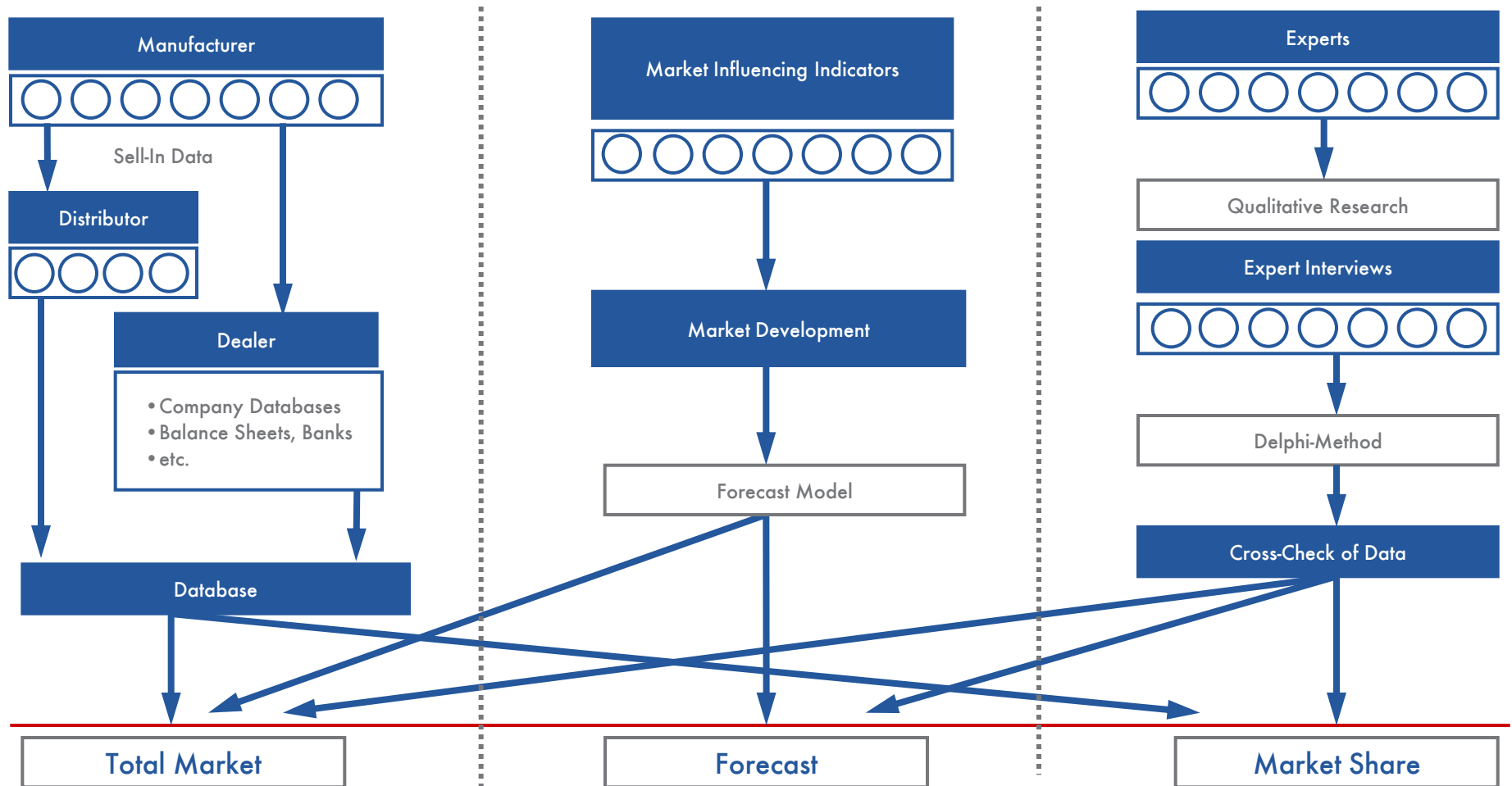
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

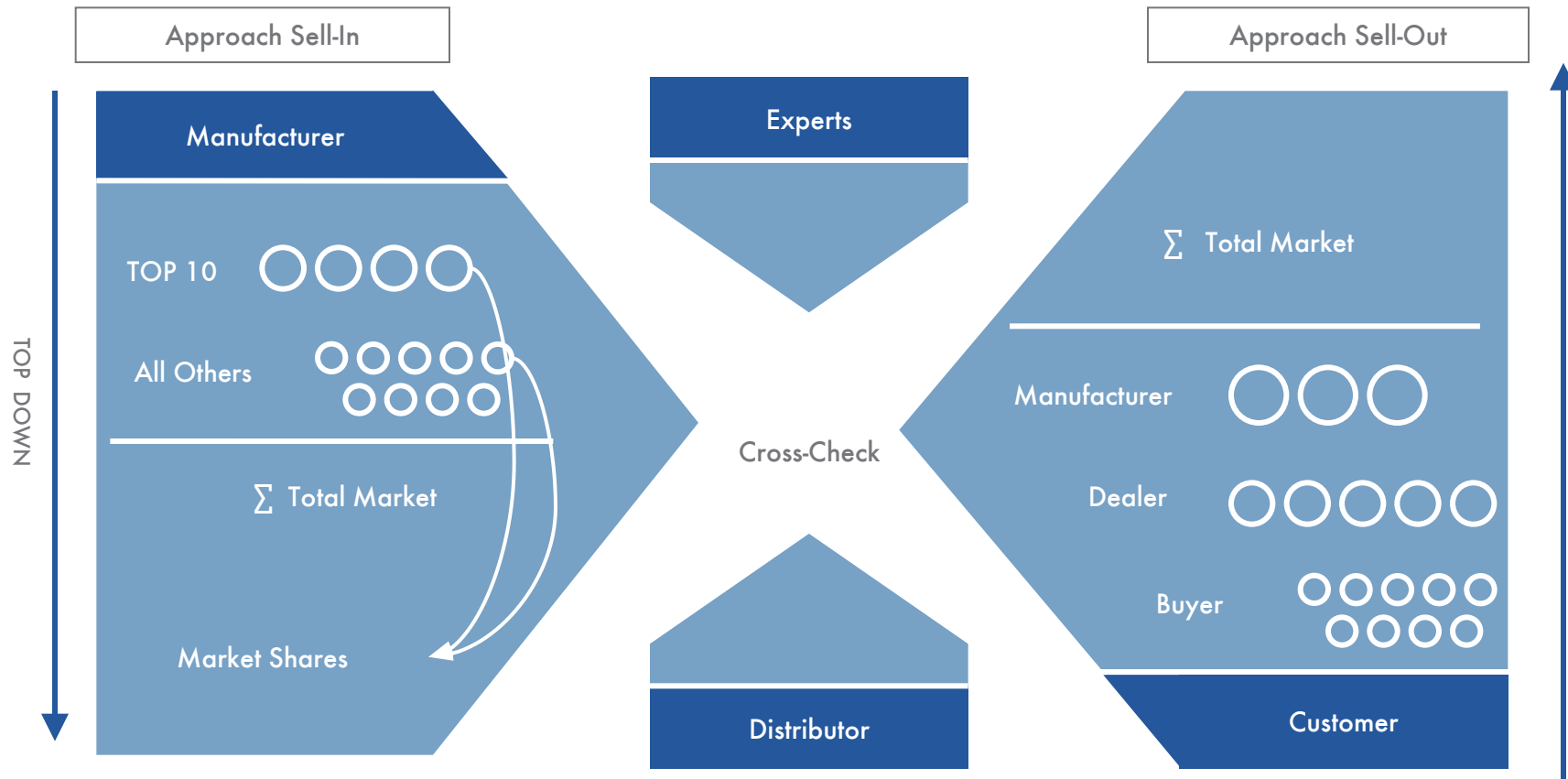
Methodology



# Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology



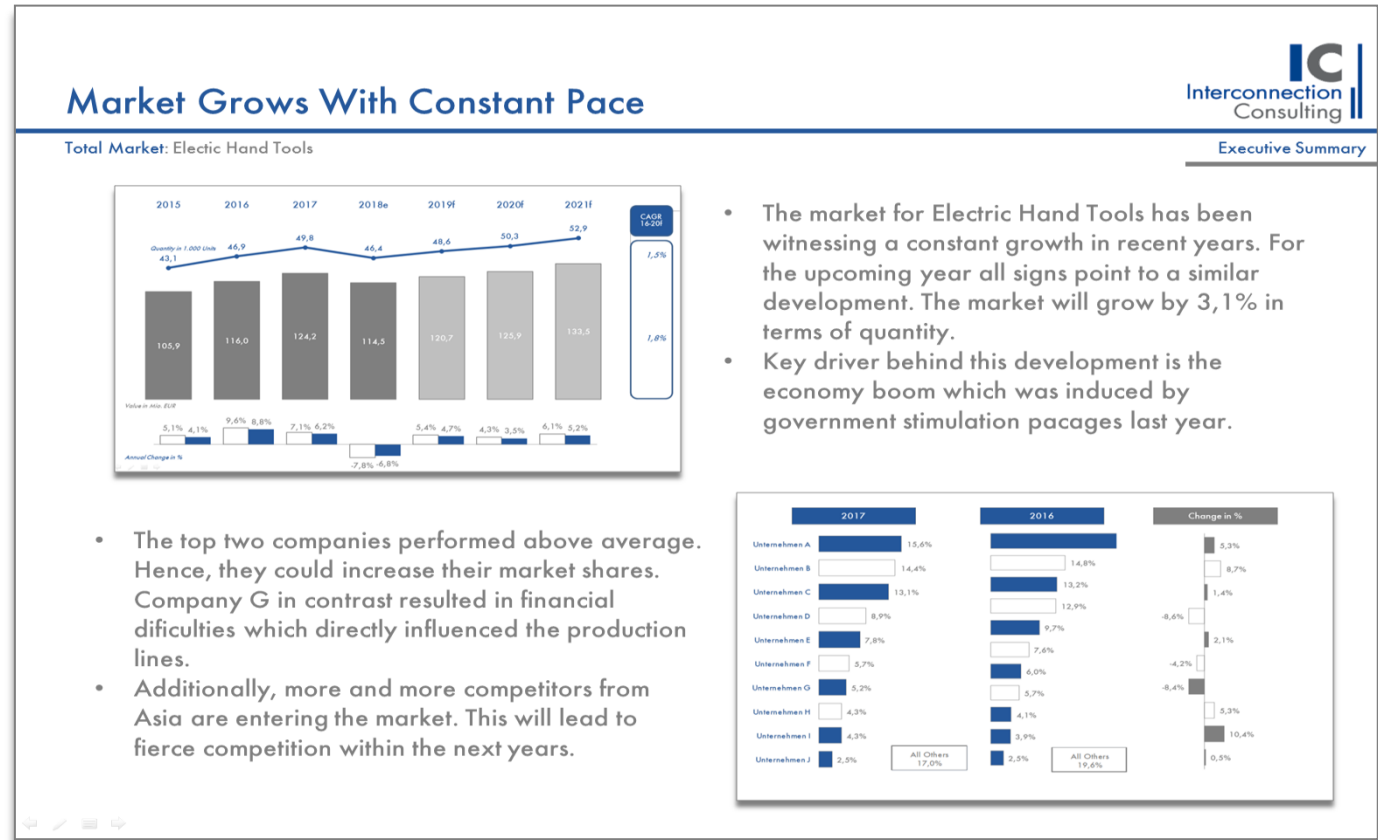


*The IC Market Tracking® is modularly built and consists of the following sections:*

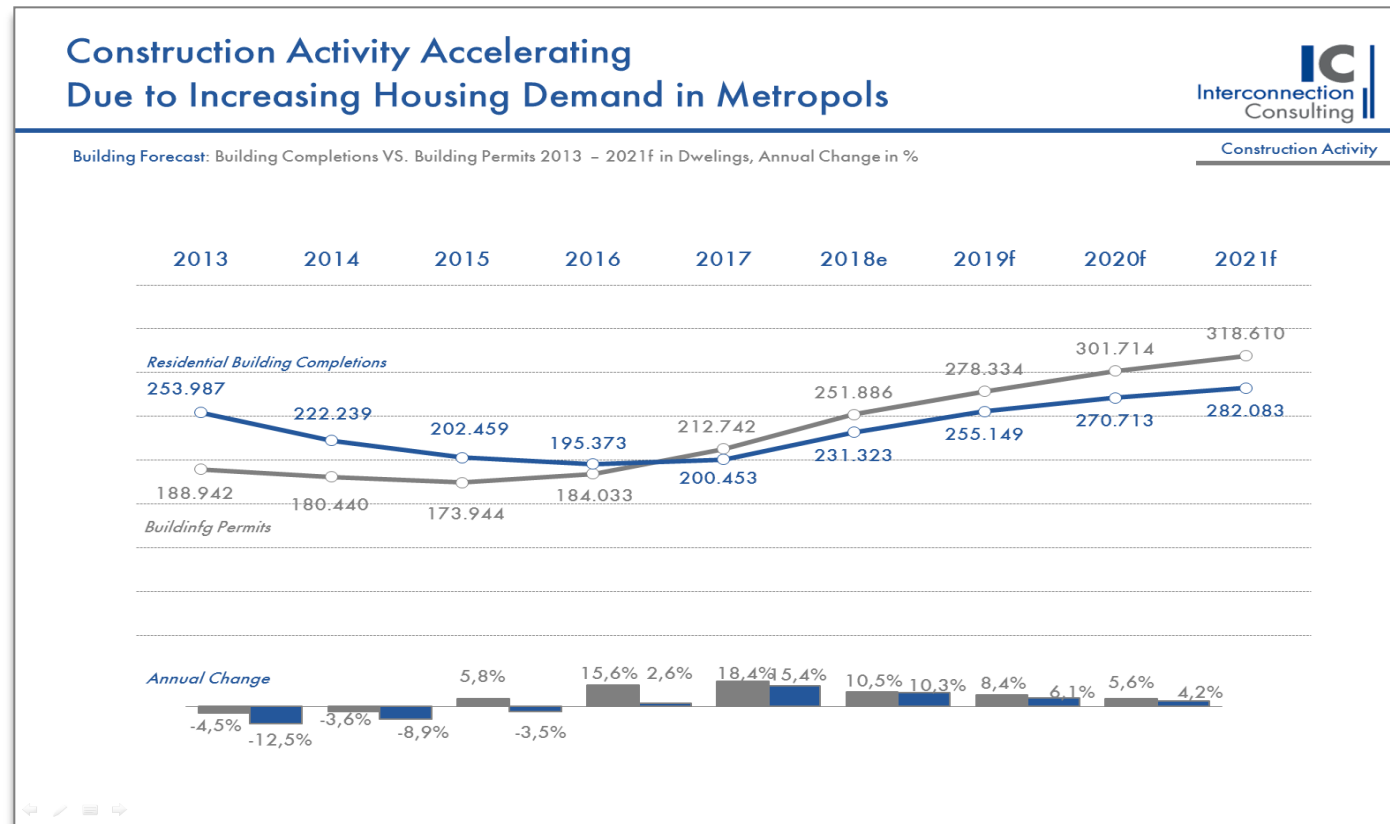
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market 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 detailed and precise manner. Forecast and competition situation is highlighted.*
- ❑ *This chart shows sample figures.*

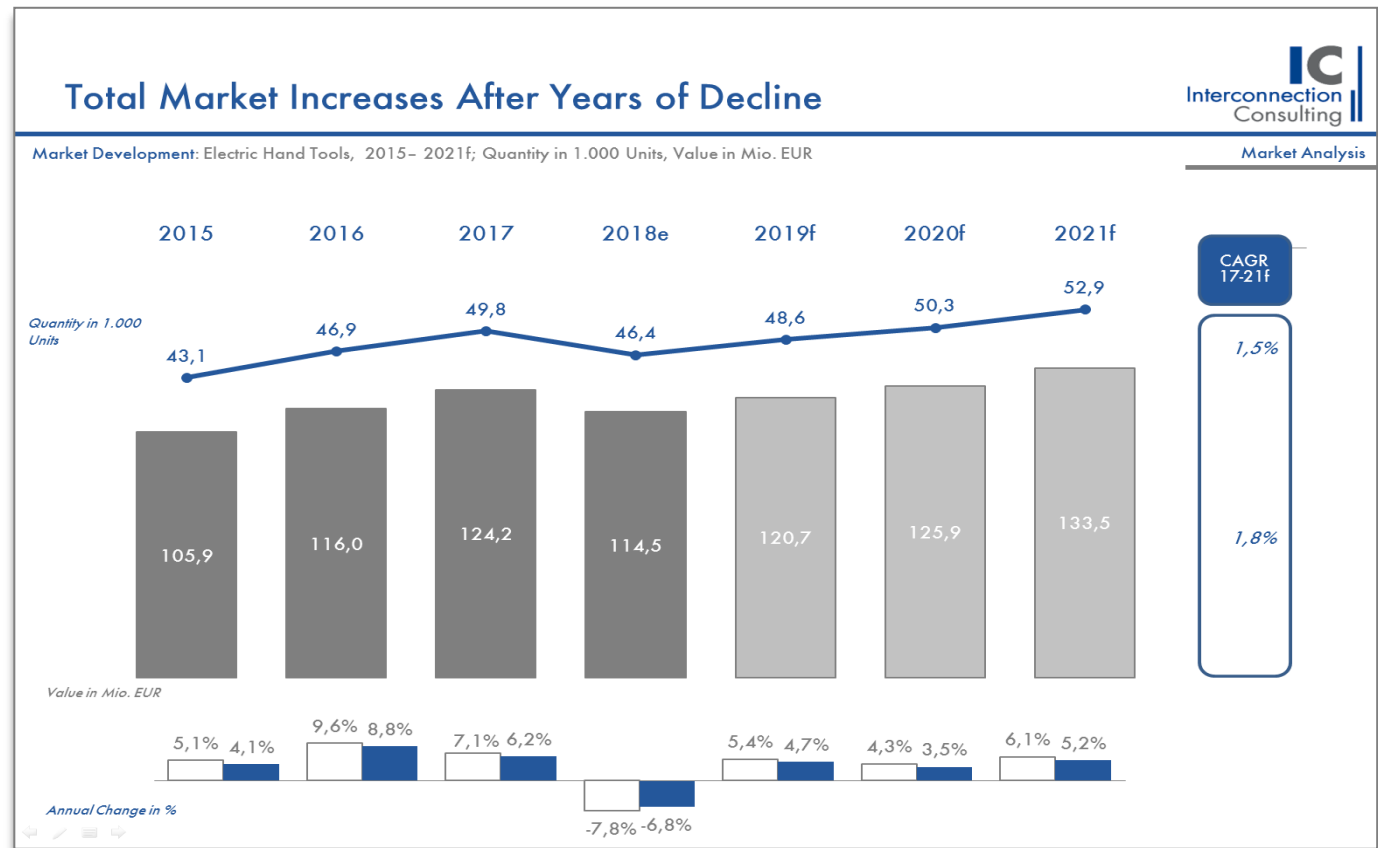


- ❑ *The data for the market environment consists of main factors such as general economy data, demography, income statistics and sentiment indicators.*
- ❑ *This chart shows dummy figures.*



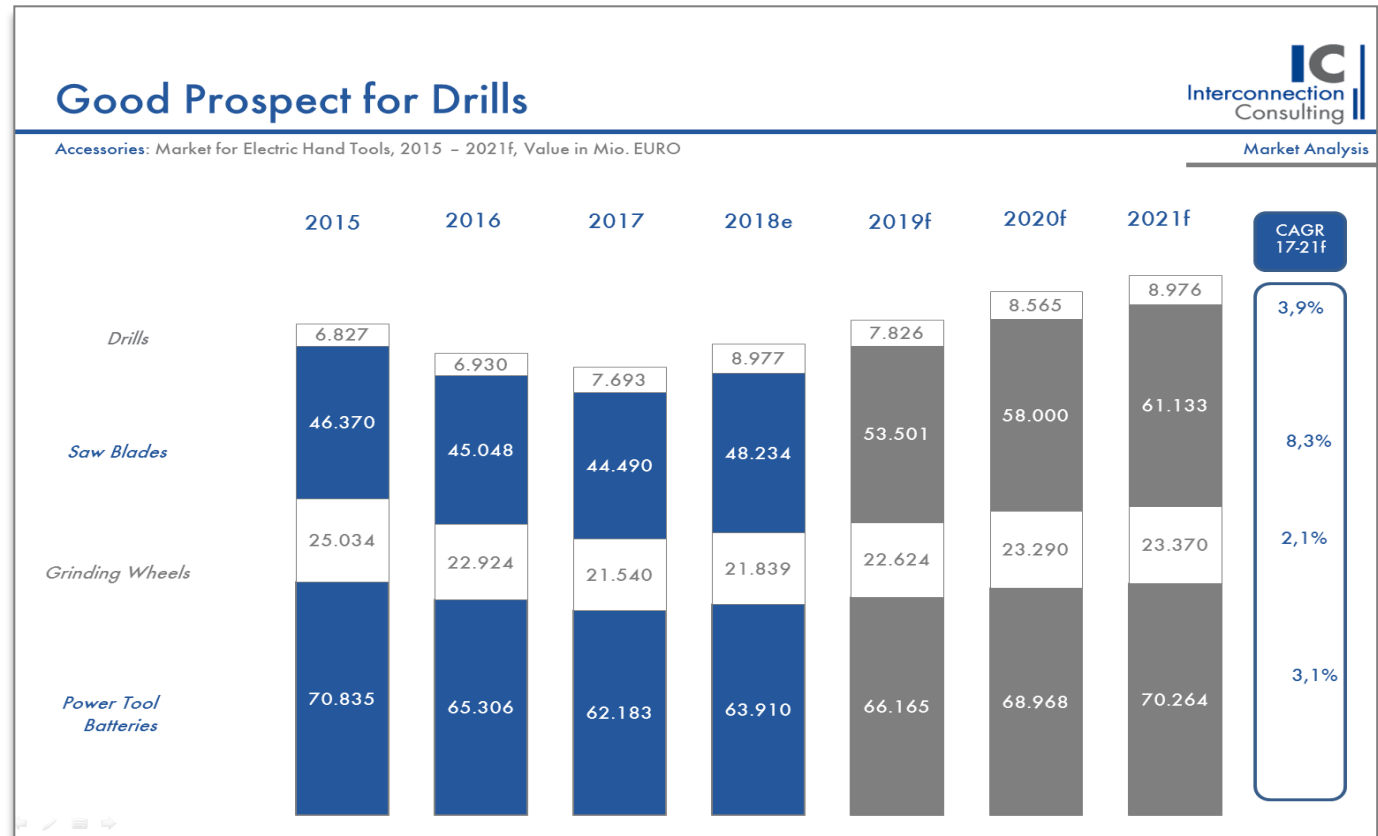
# Total Market Development and Forecast

- ❑ Overview of the total market until the current year and forecast for the upcoming three years.
- ❑ This chart shows dummy figures.

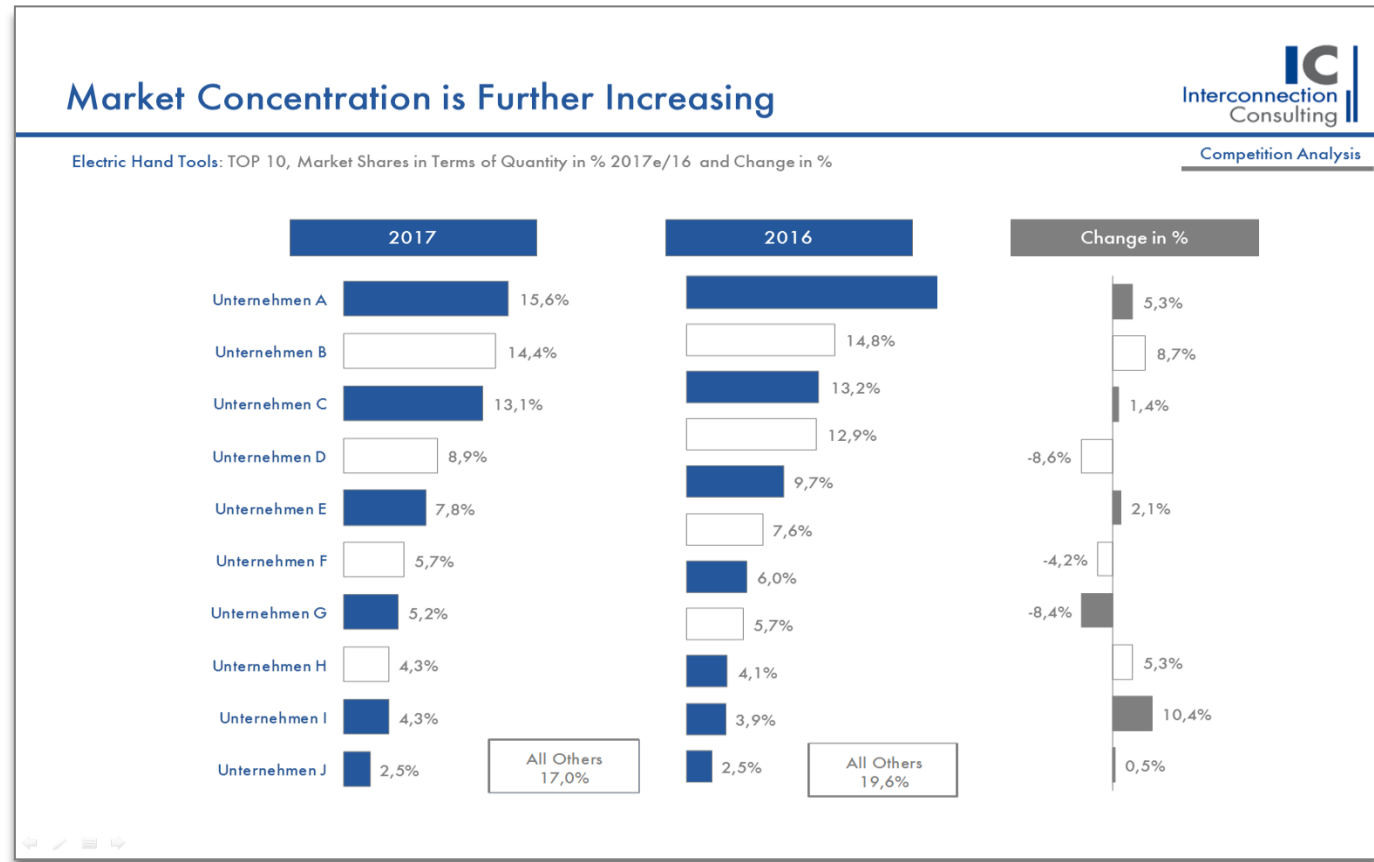


# Trend-Analysis Regarding Product Groups, etc.

- ❑ Overview of the different product groups, their distribution channels, segments including trends for the upcoming three years
- ❑ This chart shows dummy figures.



- ❑ Detailed presentation of most important companies regarding market shares, development, etc.
- ❑ This Sample Chart shows fictive 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 Discount	
All Regions**	€ 23.700,-	<b>20 % ABOVORTEIL</b>	€ 5.900	- 10%
Singel Country	€ 3.950,-		€ 8.850	- 15%
			€ 11.800	-20%
			€ 14.750	-30%
			€ 17.700	-40%



\* **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

\*\*\* Additional countries available on request, Germany and France available immediately.



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Please choose between Subscription\*  
or Single issue

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*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 B2B 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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we show you the way

## Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 365
- Optional: Hard Cover

## Price

- Single Region: 3.950 €
- All regions: 23.700 €
- 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.



## 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

#### 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: construction environment, main economic indicators, labor market, business culture;

#### Total Market Analysis

Total market development and forecasts for all market segments by regions, product groups, business segments and distribution channels.

#### Competitive Analysis

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

### Market Structure

#### Regions:

Germany, Austria, Switzerland, Spain, UK, France, Benelux, Italy, Poland, Czech Republic

#### Product Groups

Screwdrivers, Hammers, Drilling and Impact Drills, Grinder/Polisher, Angle Grinder, Circular Saw, Jigsaw, Reciprocating Saw, Mill-Cut, Sheet Metal Working Tools (Nibblers/Shears), Multifunctional Tools

#### Price Range

Economic, Hobby, Professional

#### Accessories

Drills, Saw Blades, Grinding Wheels, Power Tool Batteries

#### Distribution Channels

Building Materials / DIY, Wholesale, Specialized Dealers

#### Power Supply

Battery Pack, Power Adapter

### 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.