



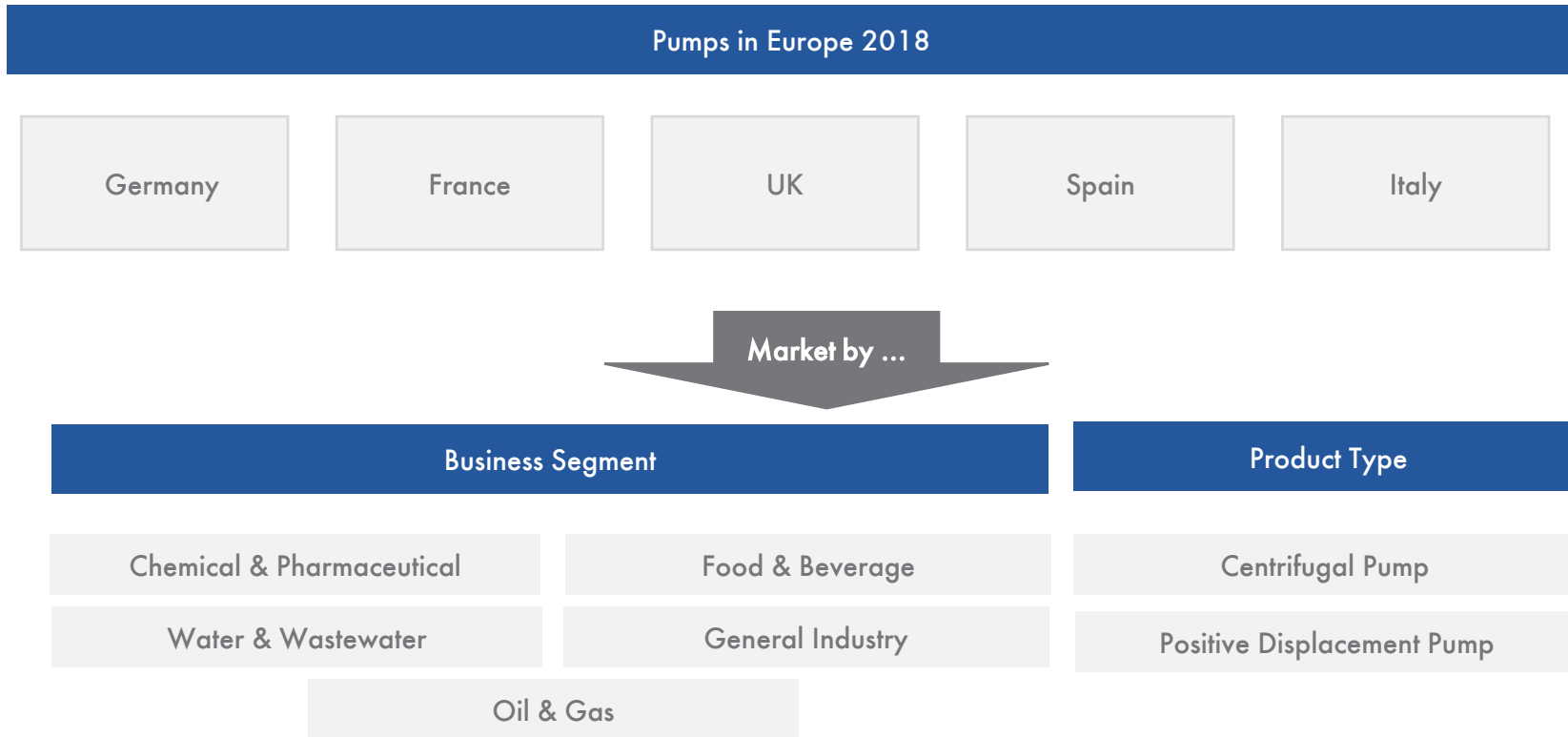
IC Market Tracking
Pumps in Europe 2018

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Your Benefits at a Glance

- ✓ You will receive an overview of the **overall market** in addition to **individual market segments**.
- ✓ A detailed **representation of the key markets by country and forecasting until 2021** based off of our econometric forecast model.
- ✓ **A competition analysis** containing detailed **market shares** in terms of:
 - Total market
 - Regional market
 - Product Type
 - Business Segment
- ✓ **Graphic representation, interactive charts and tables** which allow for rapid application and utilization of the provided data.





For all represented segments we show the total market and a forecast up to 2021, as well as market shares of the top players for the years 2017 and 2018e.

Product Type

Centrifugal Pump

A pump that uses a rotating impeller to move fluids around in a circular movement.

Positive Displacement
Pump

A pump used to displace liquid at a steady rate through a system.

Definition and Demarcation

Business Segment

Oil & Gas

Pumps are used to accelerate and transport fluids through the pipeline, but also for injection task, chemical transfer or steam stripping.

Water & Wastewater

Pumps are recommended for the disinfection process in both water and wastewater treatment. They help collecting the waste water in the plant as well as distributing the clean water.

Chemical & Pharmaceutical

Pumps are used at all stages from processing, dosing to mixing or transferring various acids and liquids.

Food & Beverage

Pumps are used in many application from preventing seal and packing failure to filtrations or food preservation.

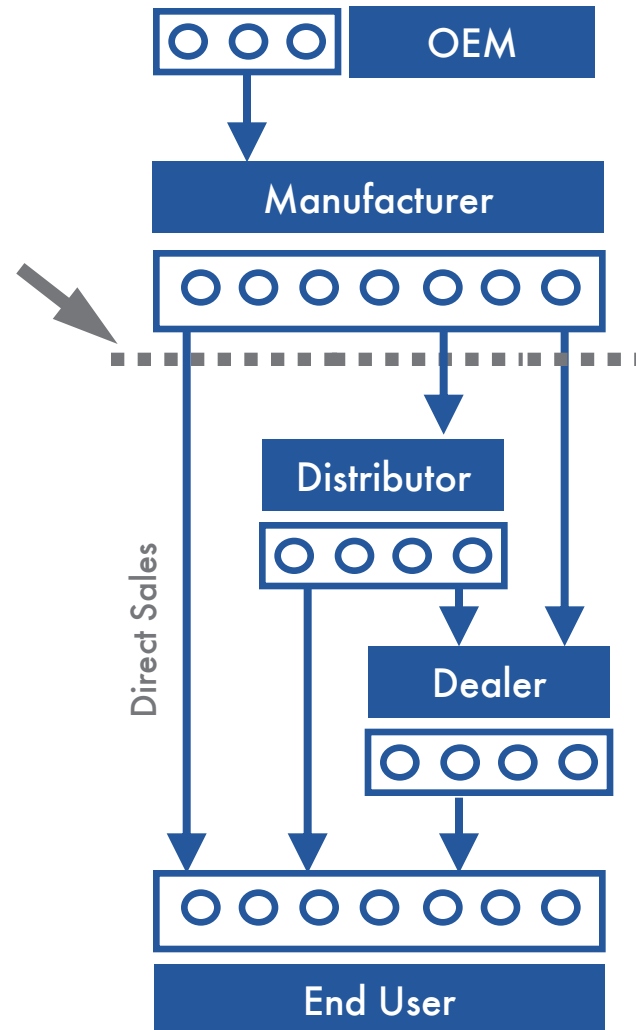
General Industry

Pumps are used for a variety of industrial application including power generation, mining, pulp and paper, but also plastic processing or paints and pigments.

What Do We Measure in Our Reports?

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.



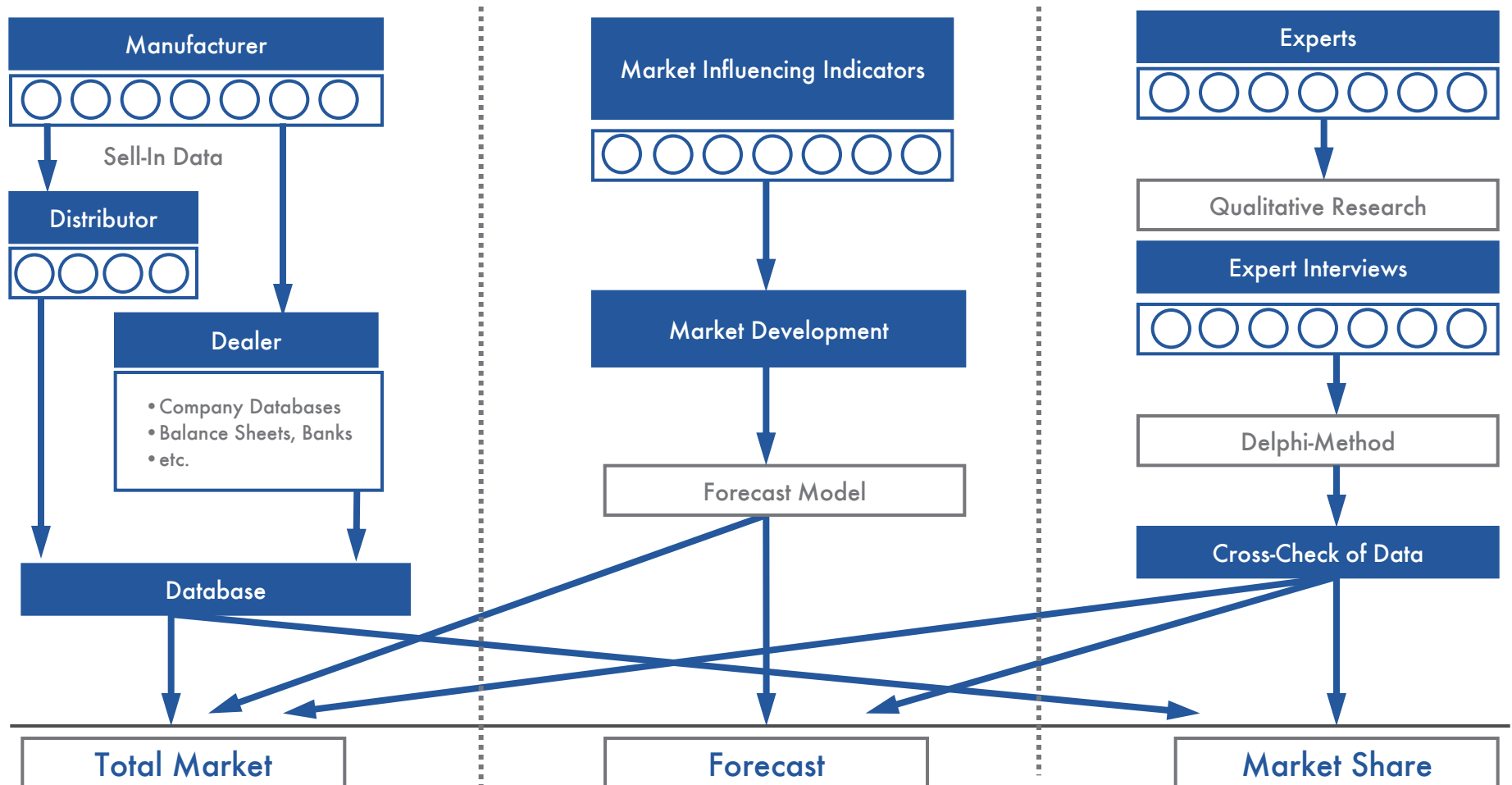
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

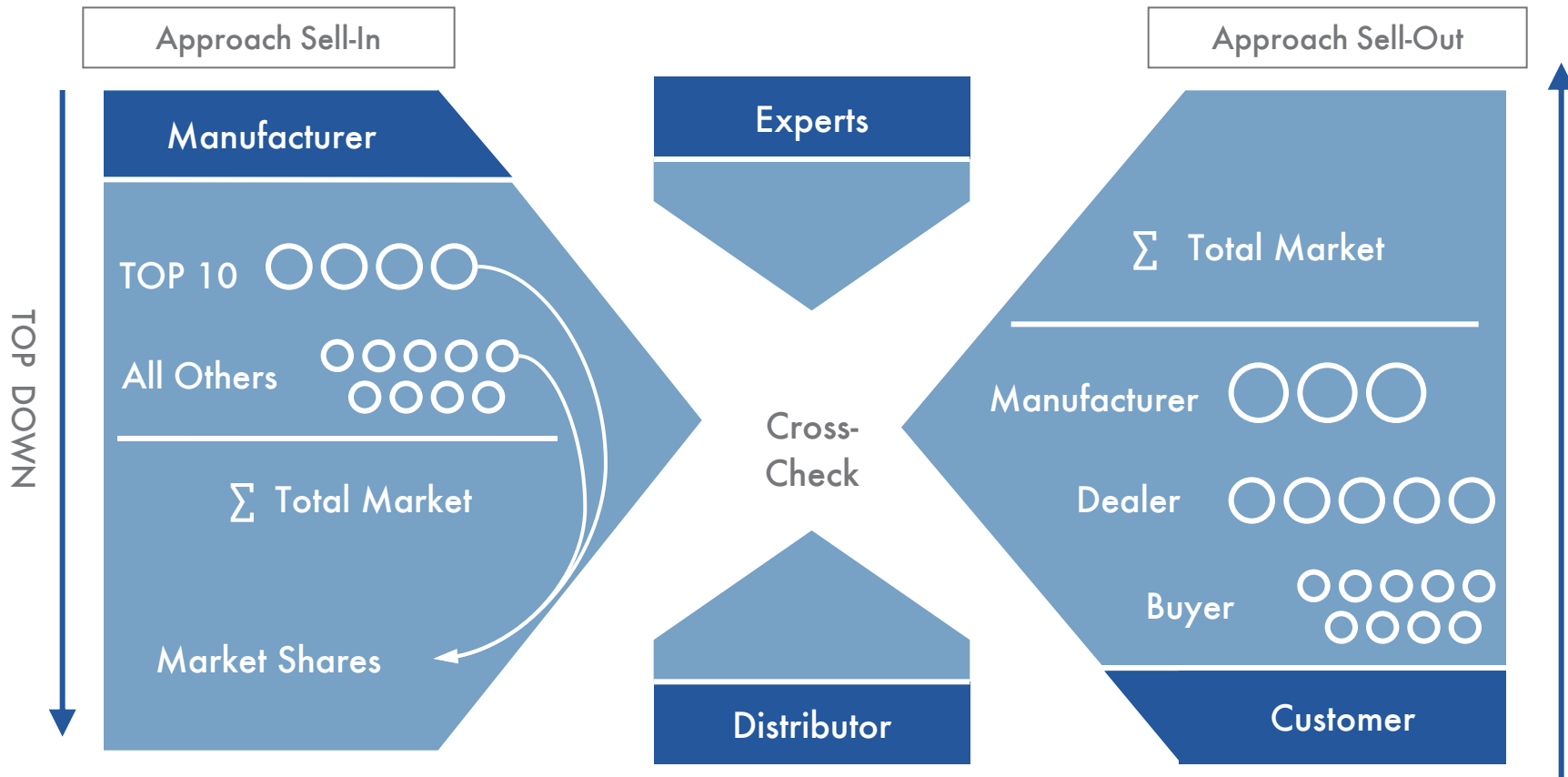
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology



How Do we Cross Check the Data?



Content of the Report

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

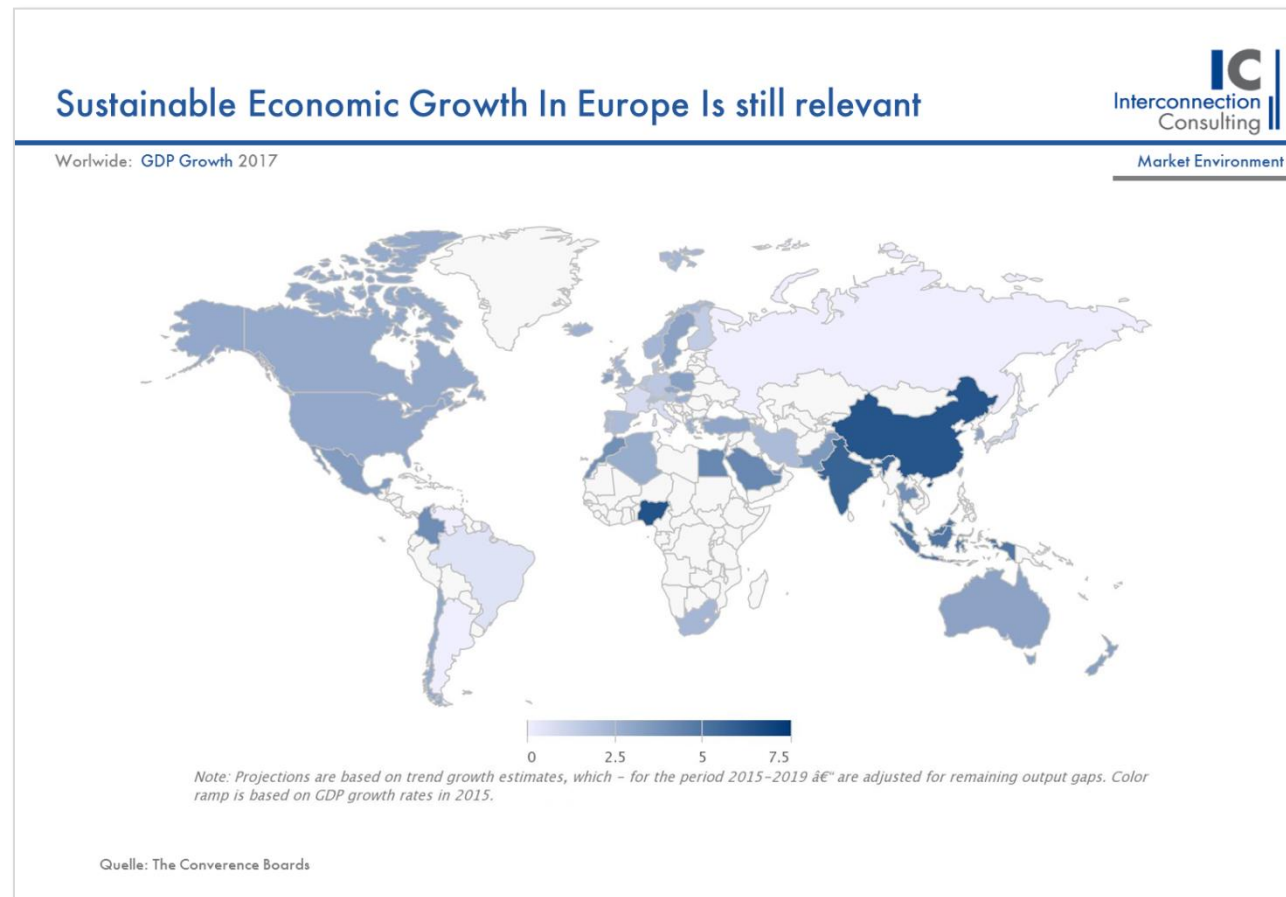
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analysed 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.

Content of the Report *

1. Executive Summary	(ca. 10 pages)
2. Definition and Methodology	(ca. 5 pages)
3. Market Drivers	(ca. 20 pages)
4. Regional Market Analysis and Forecast	(ca. 20 pages)
5. Competition Analysis	(ca. 20 pages)
6. Tables, Facts and Figures	Pivot Table

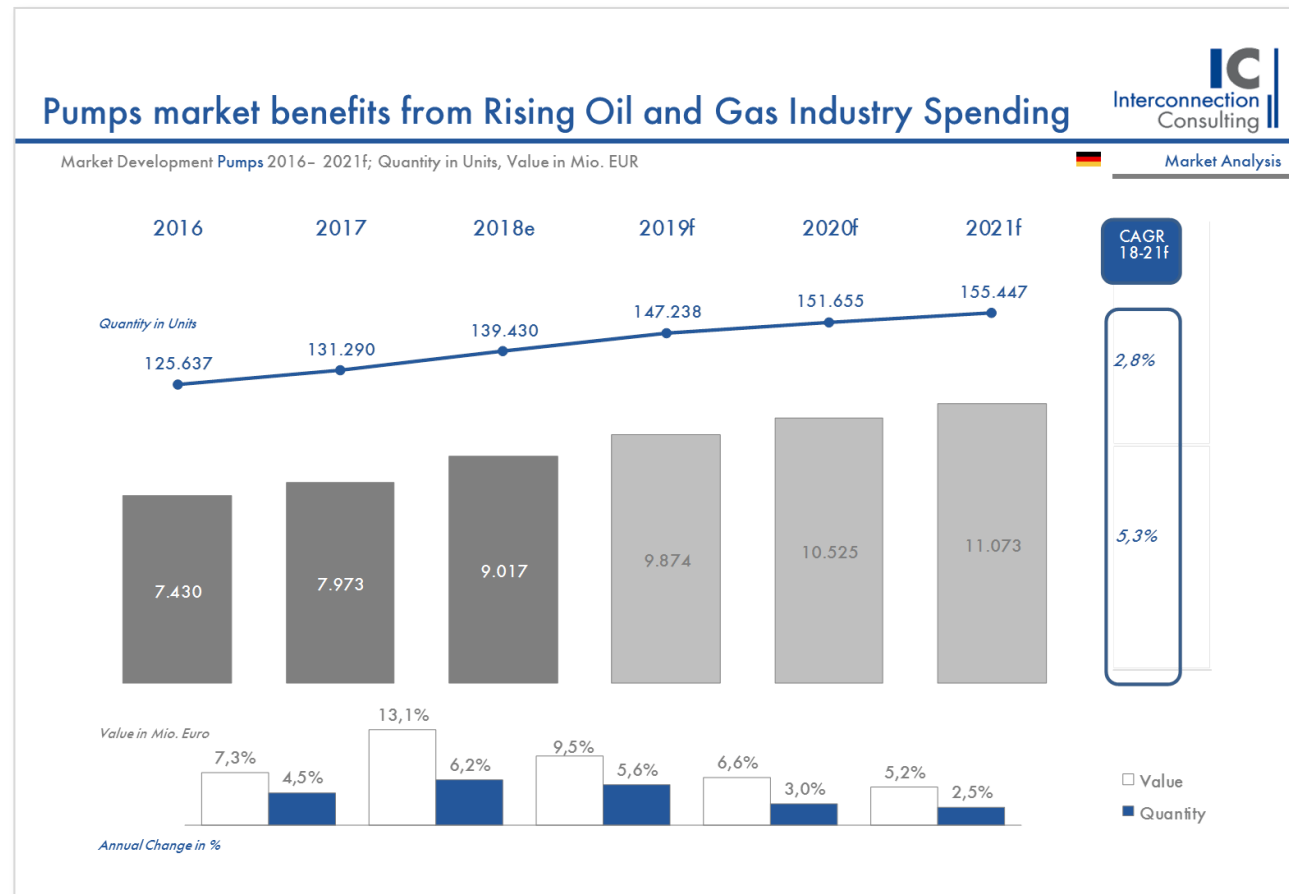
* Pages based on single country report

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

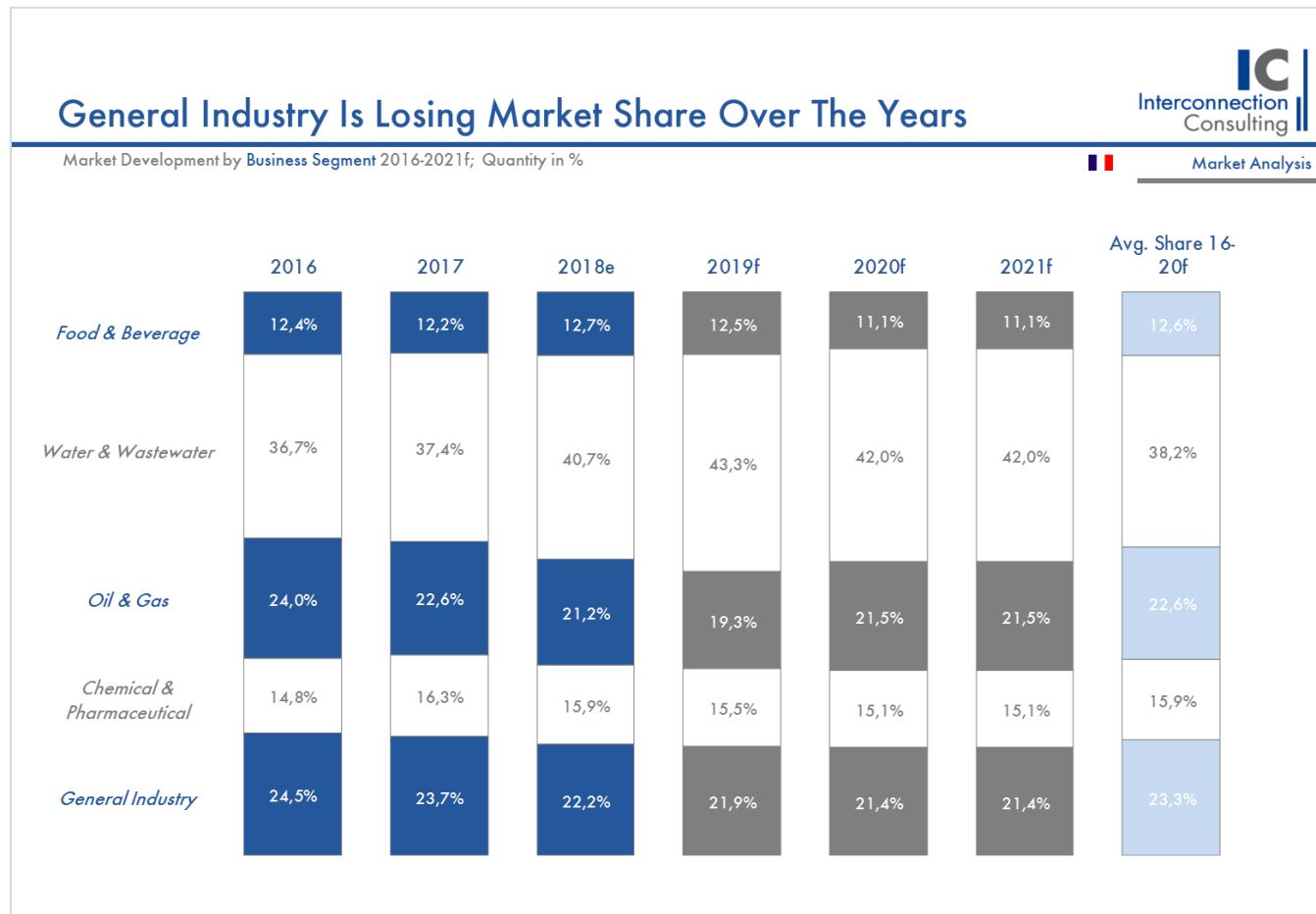


Total Market Development and Forecast

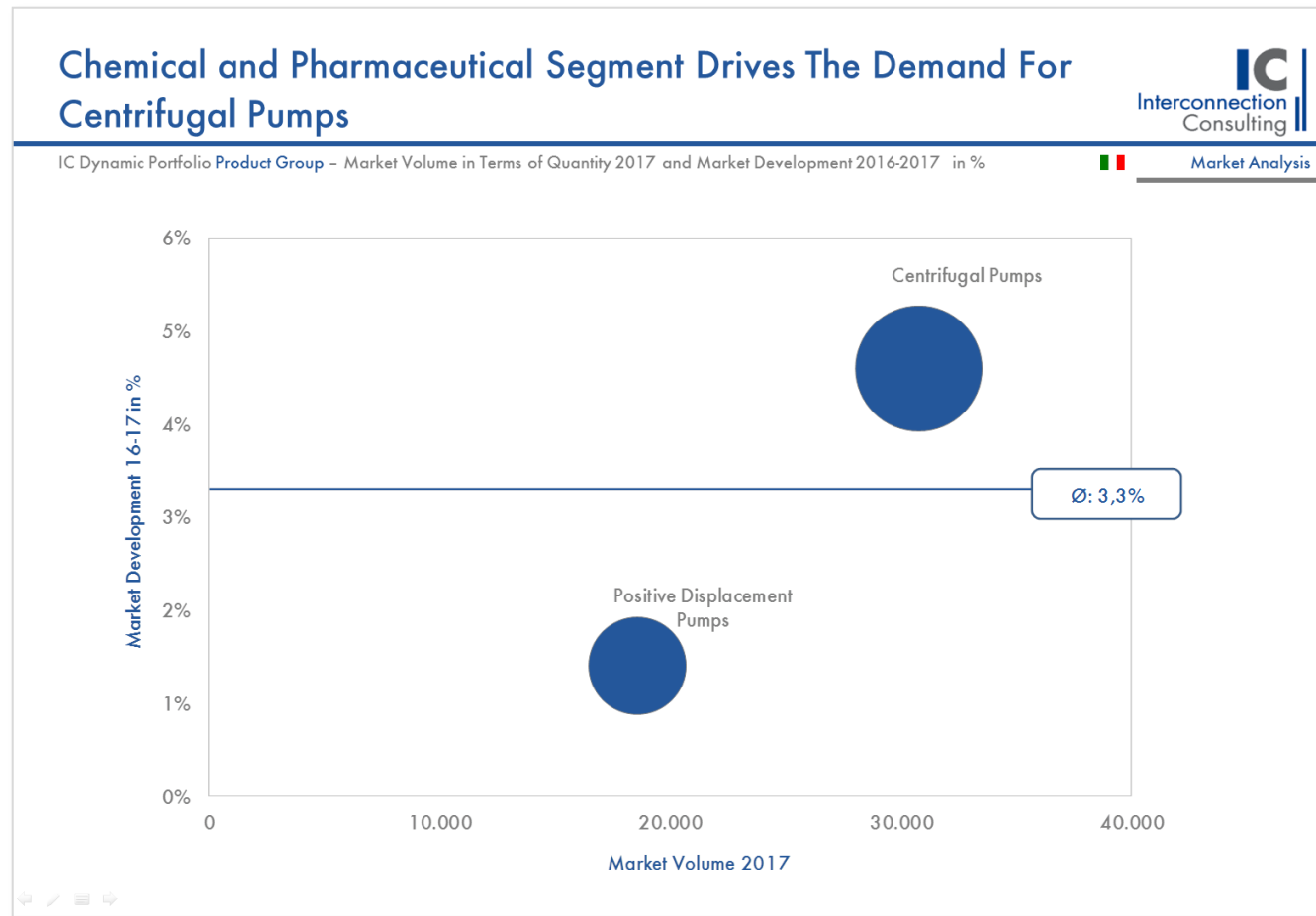
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



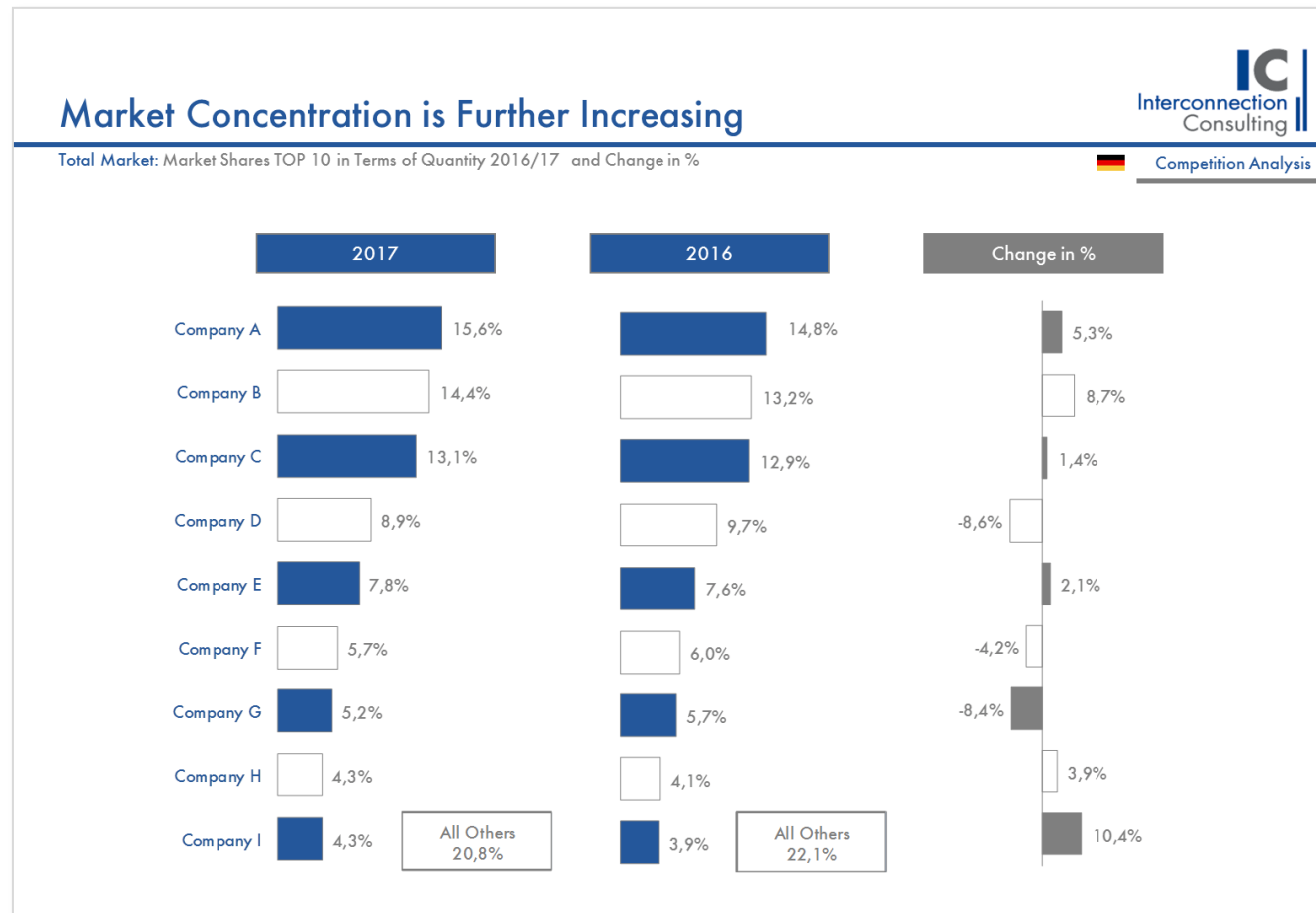
- Overview of the Product Group Segmentation, Price Segments as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



- Strategic analysis in course of portfolio charts for each product group and customer segment.
- *This chart shows dummy figures.*



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*



- In addition to the visualized 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)

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)
∅ 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

	Single Issue	IC Subscription*
Complete Report**	€ 7.110,-	
Single Country*	€ 3.950,-	

Available countries	Germany	France	Italy	Spain	UK

- **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.

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- **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


About Interconnection

- Interconnection is the leading institute for market data in the pumps 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

Webverstärker



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

"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!

Interconnection Consulting

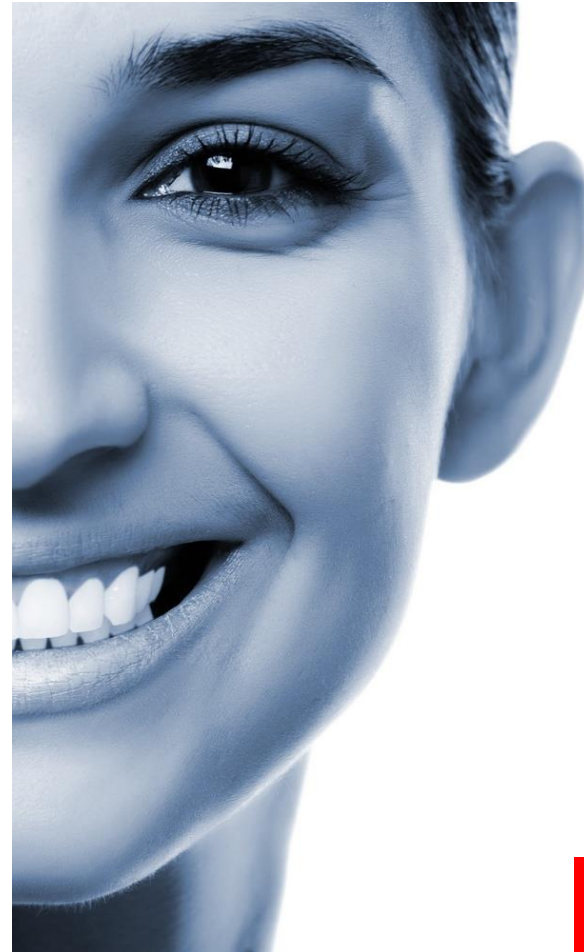
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Factsheet: Powered Exoskeleton 2018

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 75/ per Country
- Optional: Hard Cover

Price

- per region: € 3.950
- All regions : € 7.110

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

German, English 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 and business segments.

Competition Analysis

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

Market Structure

Regions:

Germany, Spain, France, UK, Italy

Business segment:

Chemical & Pharmaceutical, Oil & Gas, Water & Wastewater, Food & Beverage, General Industry

Product Type

Centrifugal Pump, Positive Displacement Pump

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.