

IC Market Tracking Surface Water Drainage Systems in Europe 2018

- Germany
- Austria
- Switzerland
- Italy
- France
- Netherlands

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** for selected regions in terms of:
 - The Total Market
 - Plasters
 - Mortar
 - Application
 - Business Segments
 - Distribution Channels
 - Plasters Types
 - Customer Segments
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.
- ✓ Company profiles for regions, where competition analysis is not available



Available Countries

Germany	Austria	Switzerland	Netherlands	France	Italy
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* Additional Regions Upon Request

Product groups

Linear Drainage	Point Drainage
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Linear drainage

Drainage Channels	Cover Gratings
Concrete	Cast Iron
Polymer Concrete	Plastic
Polypropylene (plastic)	Steel/Copper

Customer Segment

Residential
Civil/Public space
Others

Distribution Channels

DIY Stores
Specialized companies
Others

Load classes

Class A 15	Class B 125	Class C 250
Class D 400	Class E 600	Class F 900

For each segment, we show the overall market development for the last few years and the forecasts for the next three years.

We also show the market shares of the top companies in the Surface Water Drainage product groups for the last two years (2016/2017)

Surface drainage is the method by which water is collected and drained from sidewalks, roads, lawns and garden plots. In this case, the drainage of surface water protects from the excess moisture foundation of buildings, as well as basement and basement rooms.

Depending on the use of drainage elements, surface drainage can be divided into point and linear.

Only **outdoor drainage systems** are considered, including all kinds of hydraulic capacity (low, medium, high). Hydraulic capacity is concerned with the volume of water which needs to be removed.

Point surface drainage - is especially useful in those places, usually situated under the drainage pipes, where much water is collected after the rain or melting of the waters, and it is necessary to drain it as fast as possible. Rainwater inlets have the form of the small tanks, which are set up in the places, where rainwater is drained from the buildings' roofing, under the drainage pipes or where rainwater is collected near the doors, paths, grounds,

parking lots, porches etc. The intersection point of the slopes is usually chosen as a place for a set up, where all the water from the water drainage area or from underneath the drainage pipes is gathered.

Systems of linear surface drainage - is a system of channels connected to each other in a line designed to organize the collection of excess water in large areas. They are buried channels, made in the form of containers (drainage channels). Above, these elements are closed with removable protective-decorative cover gratings, which could be made from different materials, depending on the load classes and hydraulic capacity. Hydraulic capacity is concerned with the volume of water which needs to be removed, this can be classified as either low, medium or high.

These gratings protect against getting into the system of various household and natural debris. In addition, they ensure the safe pedestrian and transport movement.

Product groups:

- Drainage channels - are designed to collect rain and melt water from the site and organize its diversion into drainage systems. Drainage channels are available in three types: plastic, concrete and polymer concrete, which differ primarily in the class of loads.
- Cover gratings - are installed on top of drainage channel and take on the main transport load. Cover drainage gratings are made of plastic, steel (stainless steel, galvanized steel), cast iron.

Customer segment:

- Residential - private housing.
- Civil-Public Space - pedestrian areas, car parks, highways and motorways, bus terminals, shopping malls, petrol stations, airports, schools.
- Others - industrial units, ports and docks, container ports and distribution yards.

Customer segment:

- Residential – private housing.
- Civil-Public Space – pedestrian areas, car parks, highways and motorways, bus terminals, shopping malls, petrol stations, airports, schools.
- Others – industrial units, ports and docks, container ports and distribution yards.

The load classes according to a standard DIN EN 1433

In DIN EN 1433 "Drainage channels for traffic areas", the drainage channels are subdivided into classes A 15 to F 900. The classes are assigned the following test loads and installation sites:

- **Class A 15** = 15 kN test load
Residential areas used by pedestrians and cyclists, green areas
- **Class B 125** = 125 kN test load
Sidewalks, pedestrian areas and small parking lots.
- **Class C 250** = 250 kN test load
Parking lots, curbs and general commercial areas.
- **Class D 400** = 400 kN test load
Roads and all public highways.
- **Class E 600** = 600 kN test load
Industrial areas used by vehicles with a particularly wheel load, e.g. gas stations and loading dock facilities.
- **Class F 900** = 900 kN test load.
Special areas with heavy wheel loads, e.g. airports and docks.

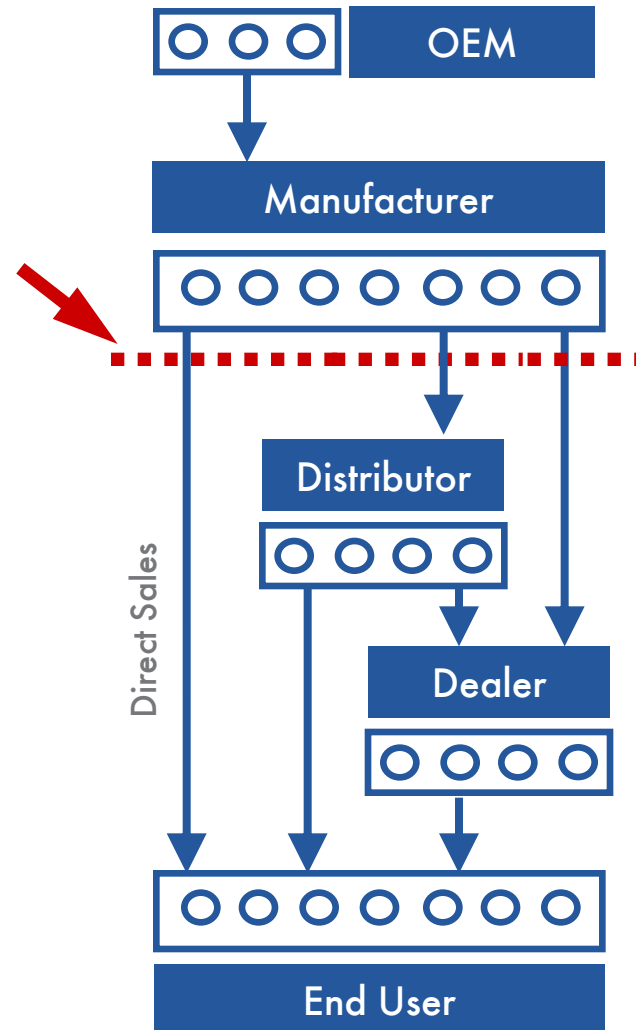
Distribution Channels

- Building Material Trade/DIY - large hardware stores that sells directly to the consumer and craftsmen, for example: Hornbach, Obi.
- Specialized Companies - builders or construction companies, which directly install the drainage systems for their clients.
- Others - comprises from Online Sales via webpage, purchases at company stores/sites shops, wholesalers purchasing merchandise from manufacturers or other suppliers and these continue to retailers, industrial users or other institutions

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.



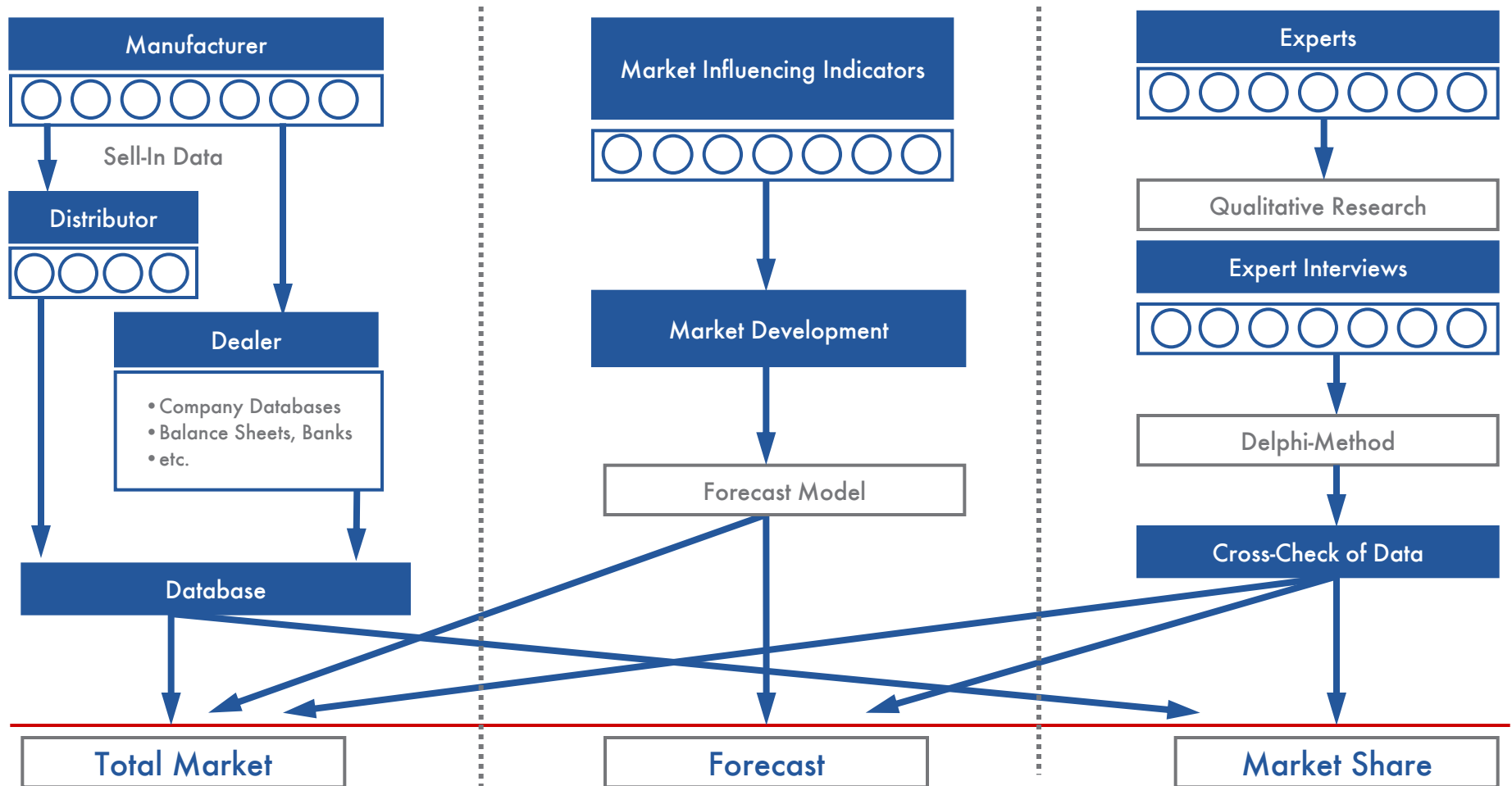
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

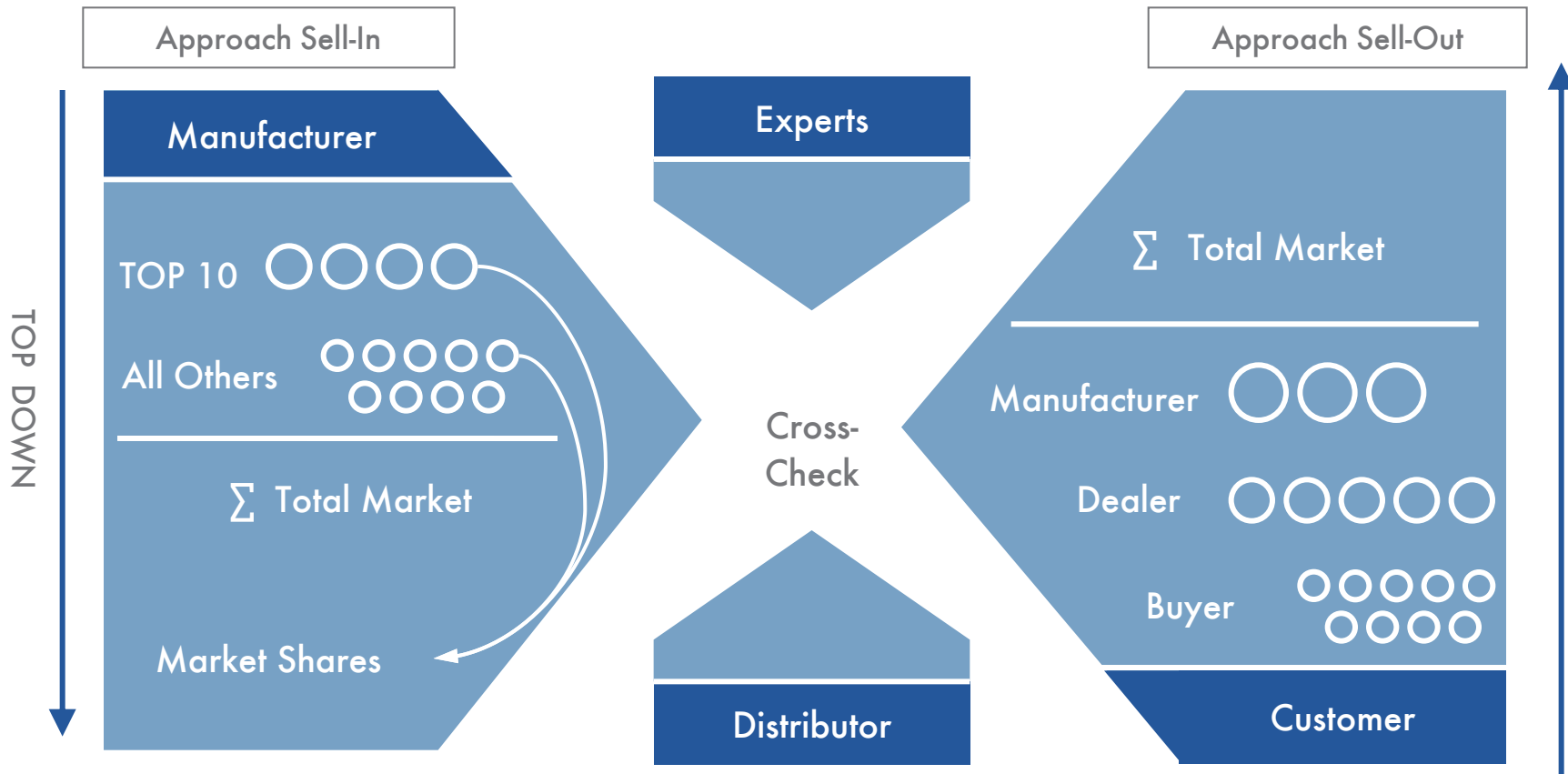
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology



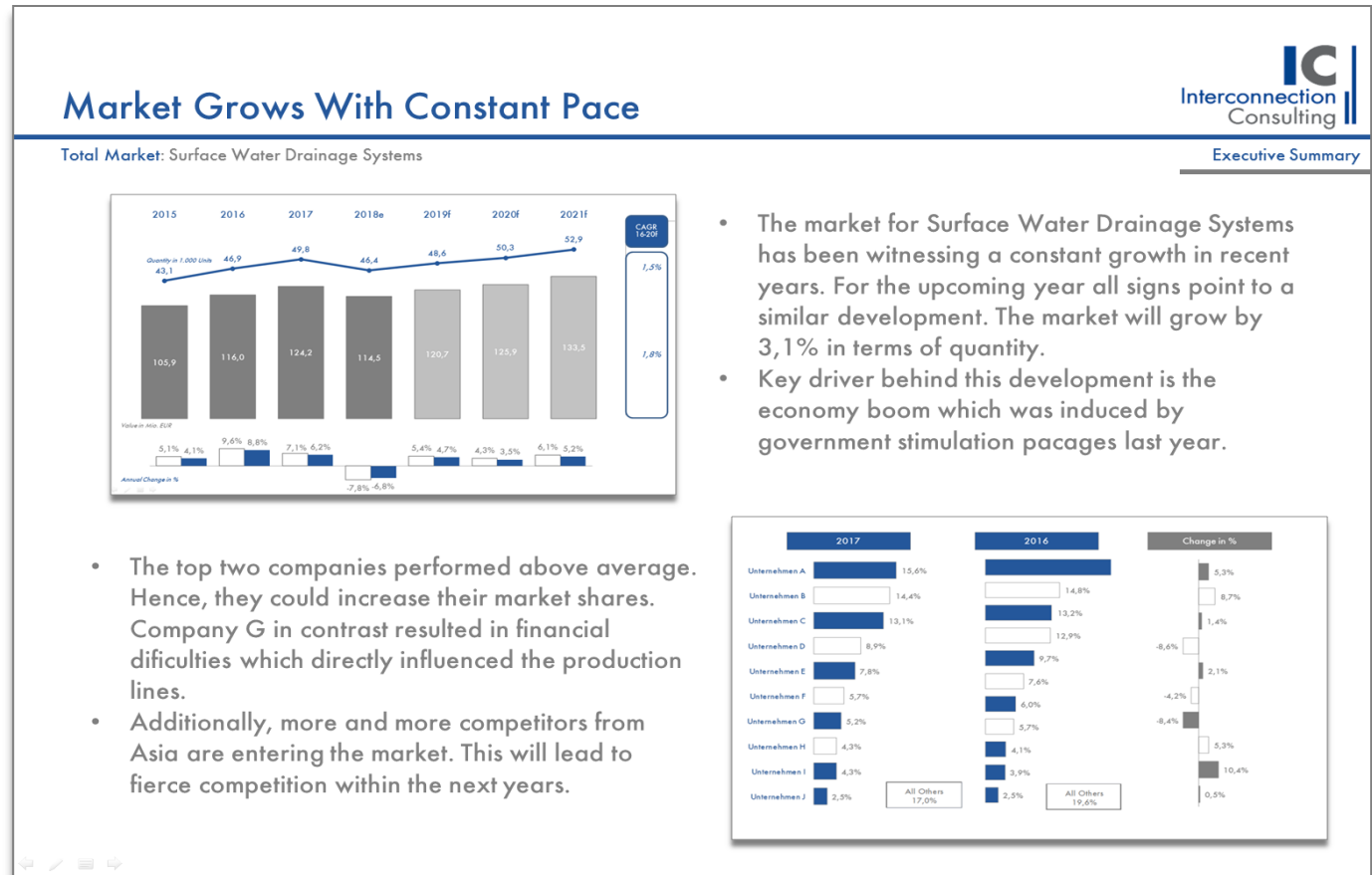
How Do we Cross Check the Data?



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

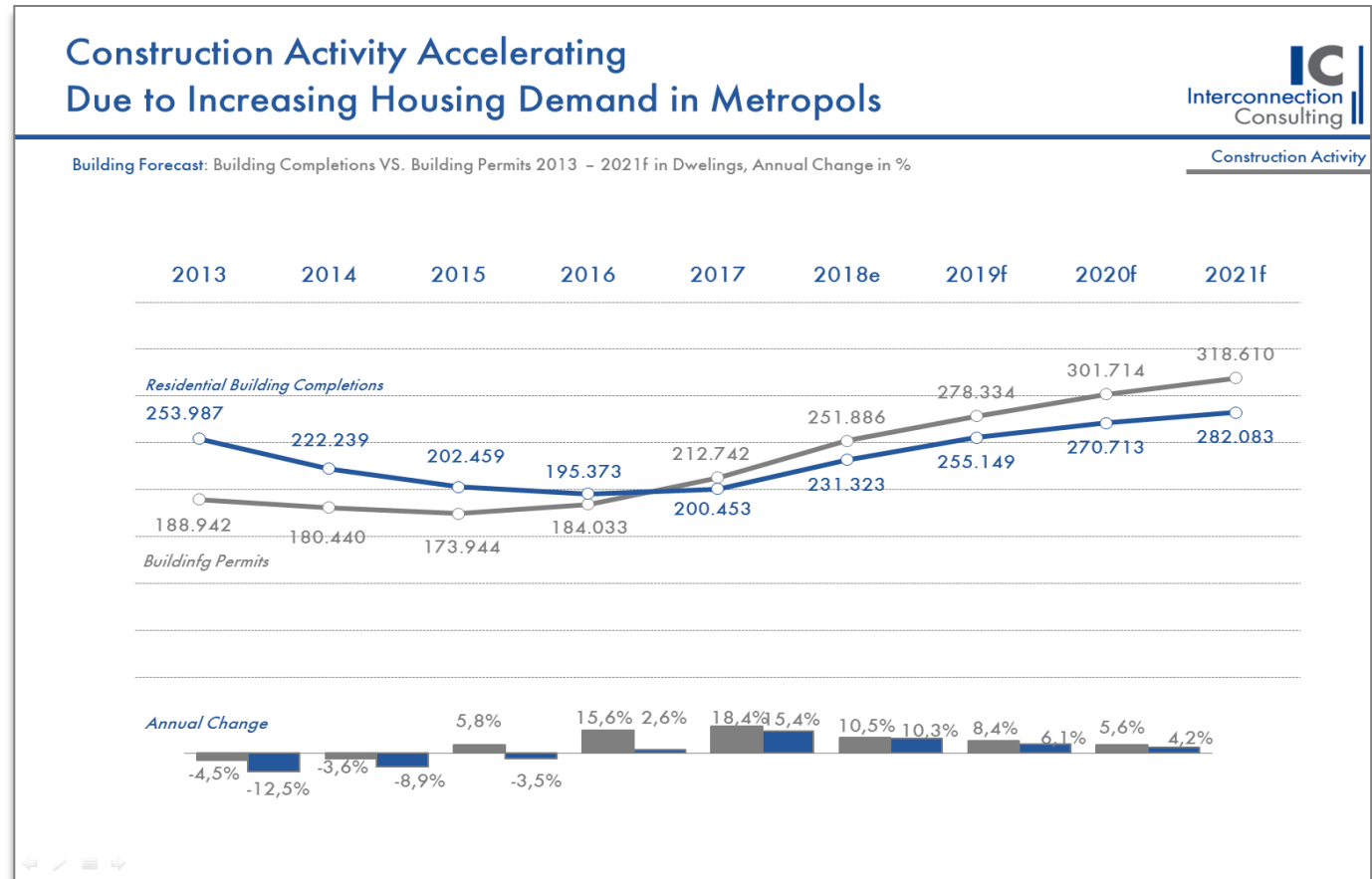
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market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

- The executive summary comprises all relevant information of the report in precise manner. Forecast and
- competition situation is highlighted
- *This chart shows dummy figures.*



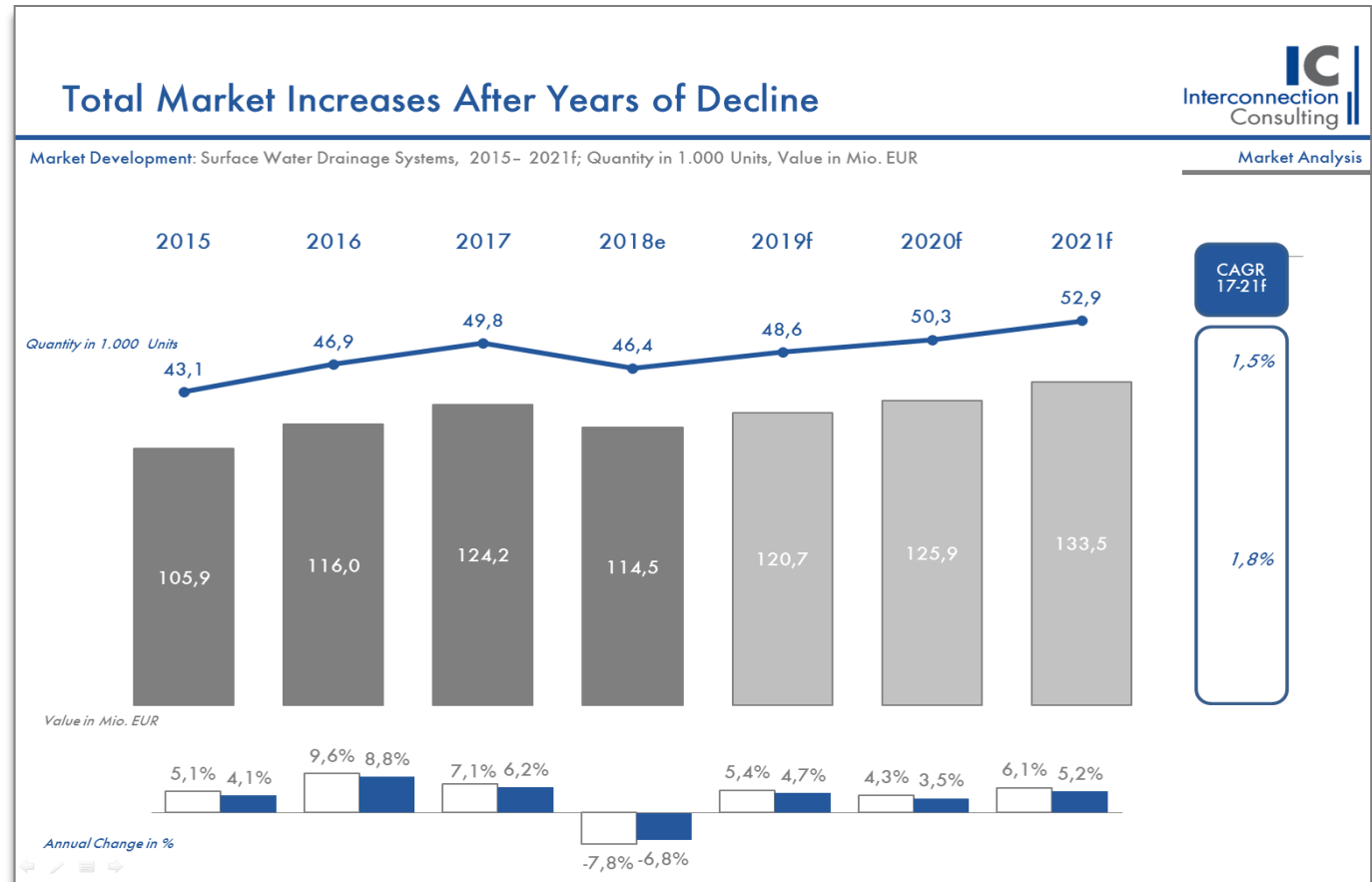
Market Environment Data of Our Forecasting Model

- 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 sample figures.*

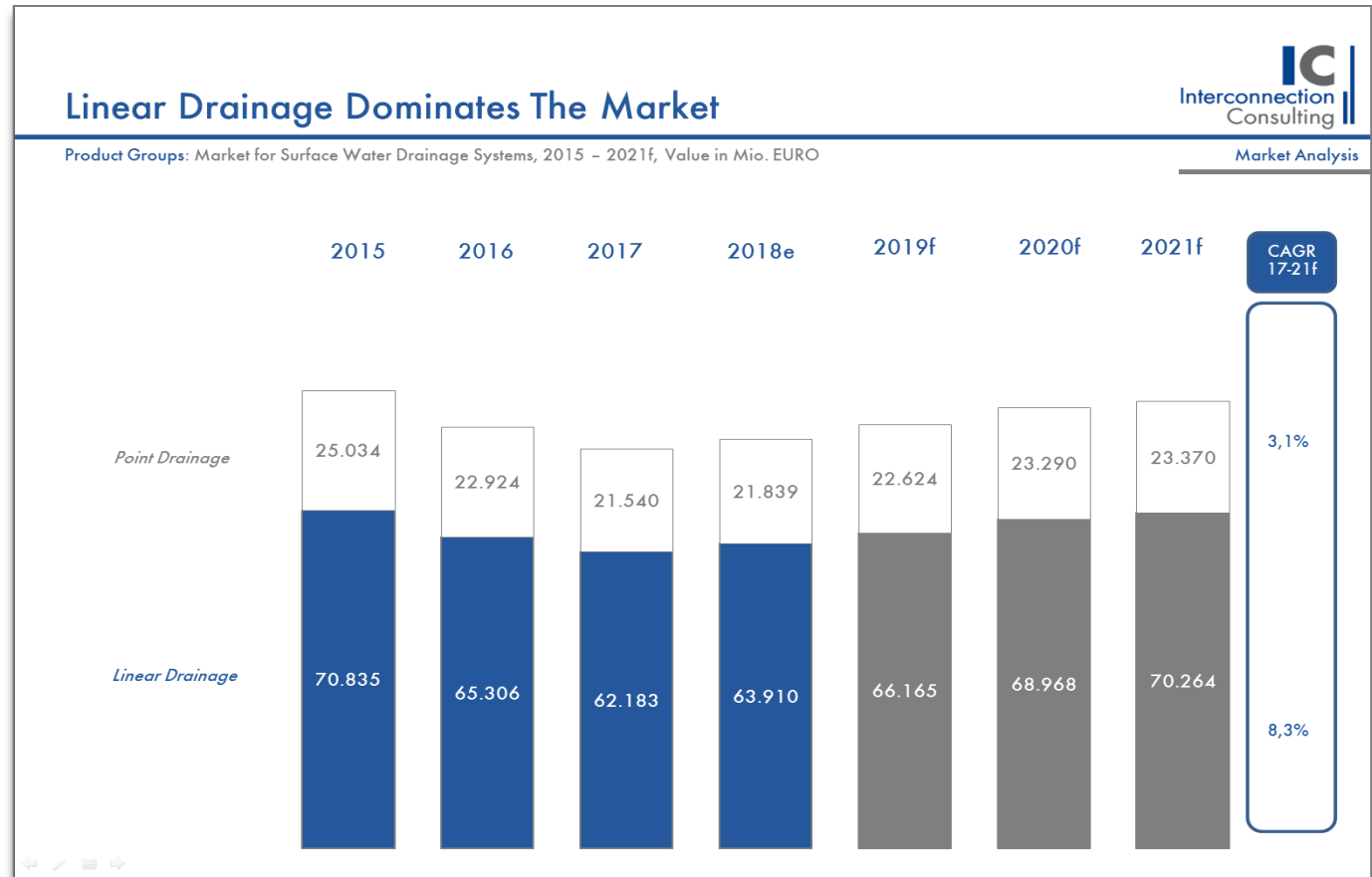


Total Market Development and Forecast

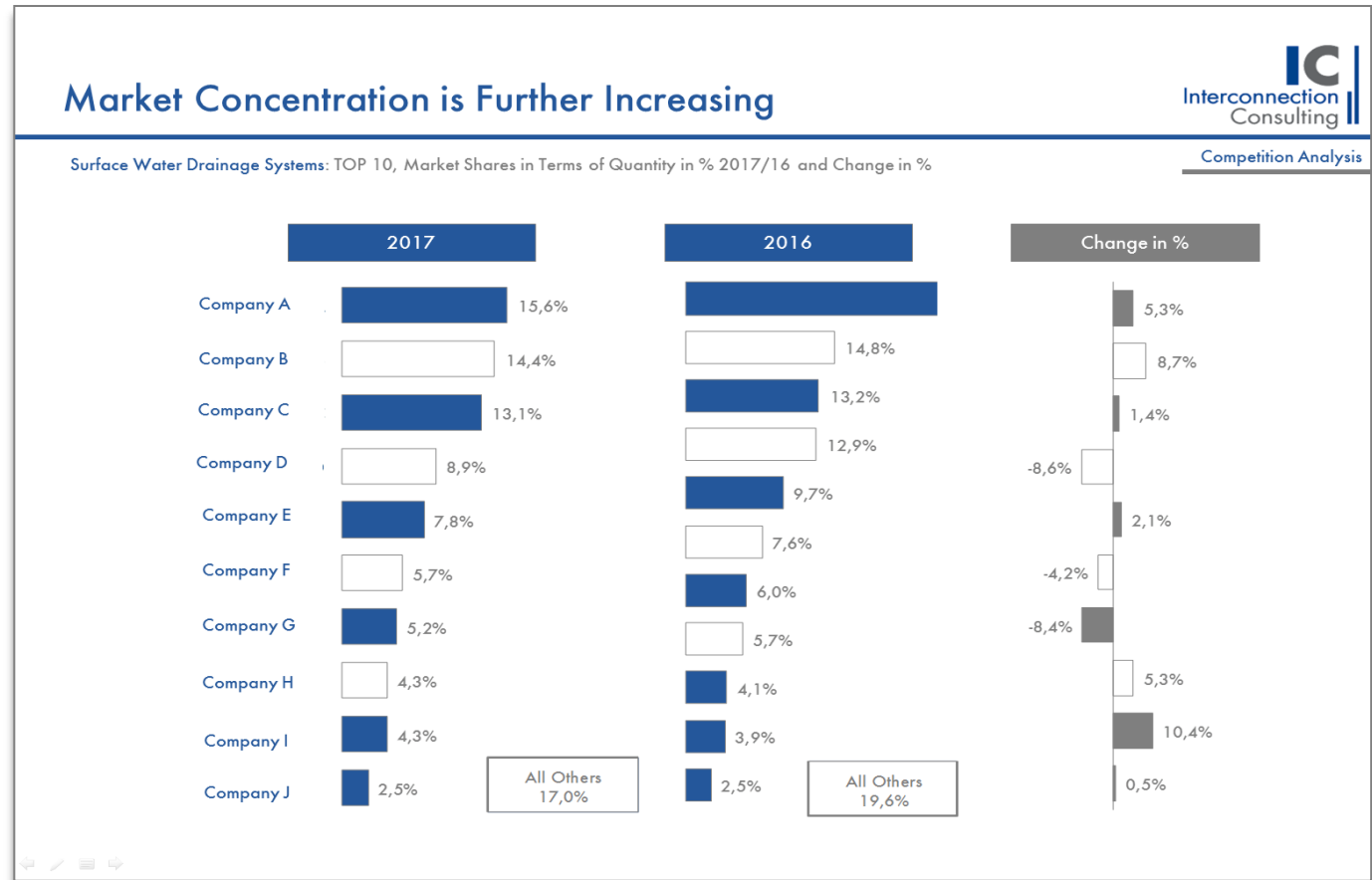
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.
- *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

Investment Plan for Your Market Research

	Single Issue	IC Subscription*	Scale of Discounts
All Regions**	€ 17.775,-	20% ABOVORTEIL	€ 7.000 - 10%
Single Country	€ 3.950,-		€ 11.000 - 15%
			€ 15.000 - 20%
			€ 18.000 - 25%

Available Regions
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Austria
Switzerland
France
Netherlands
Italy

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** **Price Special** (scale of discounts are not applicable, subscription applies)
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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

- Interconnection is the leading institute for market data in the flooring 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!**

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Inquiry

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Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 75/ per Country
- Optional: Hard Cover: 300 €

Price

- Single Country: 3.950 €
- All Countries: 14.220 €
- 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.
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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, 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, driving system types and application fields and automation.

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.

Market Structure

Countries / Regions

Germany, Austria, Switzerland, France, Italy, Netherlands

Product groups

Linear drainage, Point drainage systems

Linear Drainage

Drainage channels, Cover Gratings

Load classes:

A15, B 125, D400, E 600, F 900

Customer Segments

Residential, Civil/Public space, Others

Distribution Channels

Building Materials/DIY, Specialized companies/ Others.

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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