Cover Angebot

we show you the way

IC Market Tracking

Textile Floor Coverings in Europe 2016

www.interconnectionconsulting.com
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, Regional Markets
  • Customer Segment and Product Groups
  • Distribution Channel
  • Application
  • Price Categories
  • Business Segment

✓ Information about the most important Factors of Influence

✓ Graphic Presentation of the results facilitates the development of your own strategies.
Textile Floor Coverings in Europe 2016

Customer Segment

- Residential Sector
  - Woven
  - Needle Felt
  - Tufted
  - Carpet Tiles
  - Others

- Non-Residential Sector
  - Woven
  - Needle Felt
  - Tufted
  - Carpet Tiles
  - Others

Distribution Channel

- Wholesale
- Specialized Retailers/Installers
- DIY-Market
- Direct

Price Categories

- Low
- Medium
- High

Business Segment

- New Construction
- Renovation

Application

- Health+ Elder Care
- Public Sector
- Office
- Hospitality
- Education
- Transportation
- Residential
- Others

Market by...

All product groups are shown separately for Residential and Non-Residential sector; carpet tiles are further split.

For each segment the total market and market shares of the top players for 2015 and 2016 and forecasts for the next three years are available in the study.
**Definition and Demarcation**

**Product Groups**

- **Woven**
  A thick heavy covering for a floor usually made on a loom manually or mechanically.
- **Needle Felt**
  This is a single or multiple-layer floor covering consisting of a mechanically and chemically or heat-treated fibrous nonwoven. In the multilayered versions, only the pile layer contains high-quality fibre material.
- **Tufted**
  Consisting of rows of machine-punched yarns held together by adhesive and a backing.
- **Carpet tiles**
  Tiles made of carpeting material that is used for flooring.
- **Others**

**Business Segment**

- **New Construction**
  Floor Coverings used in newly erected buildings.
- **Renovation**
  Replacement of already existing Floor Coverings.
**Definition and Demarcation**

**Customer Segment**

- **Non-Residential**
- **Residential**

Application will be shown for the Non-Residential and the Residential sector in both m² and in value.

Refers to all property other than housing, such as office buildings, shopping centers, trade shops, hotels, etc.

Includes single family housing, multiple family housing such as apartments, flats

**Distribution Channel**

- **Wholesale**
- **Specialist retailers/Installers**
- **DIY-Market**
- **Direct**

Wholesalers purchase huge amounts of products from the producer to resell them to further processors or retailers.

Specialist retailers have a small, but deep and closed assortment of products (consulting and service), Installers of the produced floor coverings.

Do-it-yourself store and home improvement stores.

Sales to the end customer.
## Definition and Demarcation

### Price Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Price Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>*≤ £7 ex VAT.</td>
</tr>
<tr>
<td>Medium</td>
<td>*&gt;£7 ≤ £12 ex VAT.</td>
</tr>
<tr>
<td>Premium</td>
<td>*&gt;£12 ex VAT.</td>
</tr>
</tbody>
</table>

### Application

- **Office**
- **Hospitality**
- **Health+ Elder Care**
- **Public Sector**
- **Education**
- **Transportation**
- **Residential**
- **Others**

- Hospitals, retirement homes, nursing homes
- Boutiques, Museums, Congress Buildings, Shops...
- Aviation, Trains, Cars, Marine..
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

- Manufacturer
  - Sell-In Data
- Distributor
- Dealer
  - Company Databases
  - Balance Sheets, Banks
  - etc.
- Database
- Market Influencing Indicators
- Market Development
  - Forecast Model
- Experts
  - Qualitative Research
  - Expert Interviews
  - Delphi-Method
  - Cross-Check of Data

- Total Market
- Forecast
- Market Share
Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Approach Sell-In

Manufacturer

TOP 10

All Others

∑ Total Market

Market Shares

TOP DOWN

Experts

∑ Total Market

Manufacturer

Dealer

Buyer

Customer

Approach Sell-Out

Distributor

Cross-Check
Contents of the IC Market Tracking® 2016 Textile Floor Coverings

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.
How is the market environment developing?

- Overview of the development of relevant micro- and macro economical market influencing factors.
- This Sample Chart shows fictive figures.
Total Market and Development

- Presentation of **Total Market & Forecasts** for the next three years.
- **Market segmentation** in different customer segments.
- This Sample Chart shows fictive figures.

**Stable Increase is Expected for Upcoming Years**

*Country X: Total Market of Textile Floor Coverings 2011 – 2019f, Quantity in 1,000 m², Value in Mio. Euro*

<table>
<thead>
<tr>
<th>Year</th>
<th>Quantity in 1,000 m²</th>
<th>Value in Mio €</th>
<th>Annual Change in %</th>
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<tbody>
<tr>
<td>2011</td>
<td>2,007</td>
<td>337</td>
<td>7.5%</td>
</tr>
<tr>
<td>2012</td>
<td>2,133</td>
<td>379</td>
<td>6.3%</td>
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<tr>
<td>2013</td>
<td>2,228</td>
<td>497</td>
<td>7.4%</td>
</tr>
<tr>
<td>2014</td>
<td>2,208</td>
<td>400</td>
<td>4.5%</td>
</tr>
<tr>
<td>2015</td>
<td>2,104</td>
<td>387</td>
<td>-1.7%</td>
</tr>
<tr>
<td>2016e</td>
<td>2,073</td>
<td>370</td>
<td>-6.8%</td>
</tr>
<tr>
<td>2017f</td>
<td>2,152</td>
<td>394</td>
<td>-8.2%</td>
</tr>
<tr>
<td>2018f</td>
<td>2,307</td>
<td>431</td>
<td>-4.7%</td>
</tr>
<tr>
<td>2019f</td>
<td>2,437</td>
<td>464</td>
<td>-1.5%</td>
</tr>
</tbody>
</table>

**CAGR 15-19f**

- **Value:** 6.0%
- **Quantity:** 3.7%
Size and Market Shares of Application Areas

- Presentation of Application Areas and their Market Shares; Forecasts for the next three years.
- This Sample Chart shows fictive figures.
Size and Market Shares of Product Groups

- Presentation of **Product Groups** and their **Market Shares; Forecasts** for the next three years.
- This Sample Chart shows fictive figures.

### Tufted Segment Occupies the Biggest Market Share

**Product Groups: Market for Textile Floor Coverings 2011 - 2019f, Quantity in %**

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>31.1%</td>
<td>31.1%</td>
<td>31.1%</td>
<td>31.1%</td>
<td>31.1%</td>
<td>31.1%</td>
<td>30.0%</td>
<td>30.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>Carpet Tiles</td>
<td>18.3%</td>
<td>18.8%</td>
<td>19.3%</td>
<td>18.7%</td>
<td>19.0%</td>
<td>20.1%</td>
<td>20.8%</td>
<td>21.7%</td>
<td>22.3%</td>
</tr>
<tr>
<td>Tufted</td>
<td>47.1%</td>
<td>47.1%</td>
<td>47.1%</td>
<td>47.1%</td>
<td>48.5%</td>
<td>48.5%</td>
<td>47.9%</td>
<td>47.7%</td>
<td>47.5%</td>
</tr>
<tr>
<td>Needle Felt</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.4%</td>
<td>0.3%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Woven</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

**Avg. Sh. 15-19**

- Carpet Tiles: 21.7%
- Tufted: 47.5%
- Needle Felt: 0.3%
- Woven: 0.3%
- Other: 31.1%

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© Interconnection
How Will the Application Develop?

- Presentation of Application; Forecasts for the next three years.
- This Sample Chart shows fictive figures.
Competitor Analysis of the Top 10 Companies

- Overview of the Top 10 companies and their Market Shares for all segments displayed in market structure.
- How did the market shares of the top companies develop from the previous year to this year?

Sample Charts

Fierce Competition Among the TOP 3 on the Market

*Country X: Market Shares Top 10; Value 2016 and 2015; Change 2015 – 2016 in %*

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
<th>Change 2015 – 2016 in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company D</td>
<td>5.80%</td>
<td>5.40%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Company S</td>
<td>5.64%</td>
<td>5.30%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Company F</td>
<td>5.21%</td>
<td>5.12%</td>
<td>-8.1%</td>
</tr>
<tr>
<td>Company T</td>
<td>4.70%</td>
<td>4.64%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Company W</td>
<td>3.98%</td>
<td>3.88%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Company L</td>
<td>3.88%</td>
<td>3.79%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Company A</td>
<td>3.40%</td>
<td>3.34%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Company M</td>
<td>3.10%</td>
<td>3.06%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Company P</td>
<td>2.84%</td>
<td>2.84%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Company L</td>
<td>1.45%</td>
<td>1.45%</td>
<td>-9.1%</td>
</tr>
</tbody>
</table>

All Others: 40.63 %

All Others: 60.03 %
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.

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.
IC Market Tracking® 2016 Textile Floor Coverings in Europe

<table>
<thead>
<tr>
<th>Available Countries</th>
<th>Germany</th>
<th>Austria</th>
<th>Switzerland</th>
<th>UK</th>
<th>Italy</th>
<th>France</th>
<th>Belgium</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Netherlands</td>
<td>Poland</td>
<td>Russia</td>
<td>Czech. Rep.</td>
<td>Romania</td>
<td>Hungary</td>
<td>Slovakia</td>
</tr>
</tbody>
</table>

**Single Issue**
- Europe Total **: € 24.780,-
- Single Country: € 2.950,-

**IC Subscription**
- 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.

**Scale of Discount**
- From a sales price of
  - € 7.000: -10%
  - € 10.000: -20%
  - € 14.750: -25%
  - € 23.600: -33%
  - € 34.400: -40%

*IC Subscription: 20% price advantage compared to single issue.*

**Price taking into account the scale of discount**
Price includes an interactive PDF Document. All prices shown exclude sales tax.
Your Advantages as a Subscription Customer

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 paints 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.
Market Intelligence Tools

**Market Analysis**
- Market Potential
- Market Entry
- Competition Analysis

**Customer Insight**
- Focus Gorups
- Buying Motives
- Customer Benefits

**Pricing**
- Price-Sales-Function
- Price Simulation Tool
- Optimal Pricing

**Price Monitoring**
- Price Database
- Prices per Distribution Channel
- Explanation for Price Differences

**Customer Satisfaction**
- Importance/Satisfaction
- Portfolios
- Customer Loyalty
- Customer Typologies

**Brand Insights**
- Brand Scorecards
- Brand Triangle
- Brand Affinity

**Distribution Analysis**
- Channel Map
- Distribution Matrix
- Margins

**Webverstärker**
- E Commerce Insights
- Web Enforcer
- Search Engine Optimizing
For further questions please do not hesitate to contact us!

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erdpresser@interconnectionconsulting.com
Factsheet: IC Market Tracking® Textile Floor Coverings in Europe 2016

General Information

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

Price
- Single Issue: 2.950 €
- All Countries: 24.780 €
- 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

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.

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, Austria, Switzerland, Italy, France, UK, Belgium, Netherlands, Poland, Russia, Czech Rep., Romania, Hungary, Slovakia

Customer Segment
Residential / Non-Residential (each application is analyzed separately for each product group

Product Groups
Woven, Needle Felt, Tufted, Carpet tiles (all categories), Others

Carpet Tiles Types
Woven, Needle Felt, Tufted

Business Segment
New Construction, Renovation

Distribution Channel
Wholesale, Specialist retailers/Installers, DIY-Markets, Direct

Price Categories
Low / Medium / High

Application

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.
Yes, we would like to order the
IC Market Tracking® Textile Floor Coverings in Europe 2016
(Please, print out the order form and mark your desired products)

<table>
<thead>
<tr>
<th>Industry/Region</th>
<th>Single Issue</th>
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<tbody>
<tr>
<td>Germany</td>
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<td>Slovakia</td>
<td>2.950,- EUR</td>
</tr>
</tbody>
</table>
Abonnement (20% Price Advantage)*

Single Issue

We would like to order ...... additional hard copies, each for € 150

Translation in another language (price on request)

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From: 7.000,- EUR  10%
From: 10.000,- EUR  20%
From: 14.750,- EUR  25%
From: 23.600,- EUR  33%
From: 34.400,- EUR  40%

Billing Address: (Please fill in the data completely)

Company: ______________________________
First Name: ______________________________
Surname ______________________________
Address: ______________________________
Post code/Zip: ___________________________
Country: ______________________________
VAT identification number ___________________
E-Mail ________________________________

Delivery Address: (necessary if different from the Billing address)

Company: ______________________________
First Name: ______________________________
Surname ______________________________
Address: ______________________________
Post code/Zip: ___________________________
Country: ______________________________

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