

**IC Market Tracking<sup>®</sup>**  
Aluminium, PVC, Steel  
Profiles Machinery  
Worldwide 2024

# What Do You Get - Your Benefits at a Glance

## Content of the Report

### Market Data, Insights and Expertise...



#### MARKET ANALYSIS

- Historical market data from 2020 – 2023 for the total market development as well as
  - Product group & Services
  - Machine Types by Material
- Forecasts from 2024 – 2027 for the total market as well as each analyzed product group and segment
- Annually updates of the data

#### COMPETITION ANALYSIS

- Market shares of the top players for 2023/22
  - Market Shares on the total market in value
  - Market Shares per Product groups in value and quantity
  - Market Shares per Services in value

#### MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.



#### Market & Competition Analysis

Market Volume

Market Growth

Trends

Market Shares

# What Do You Get - Your Benefits at a Glance

## Presentation of the Data and Deliverables

### Market Intelligence Tool Access and Deliverables



#### ONLINE-COCKPITS

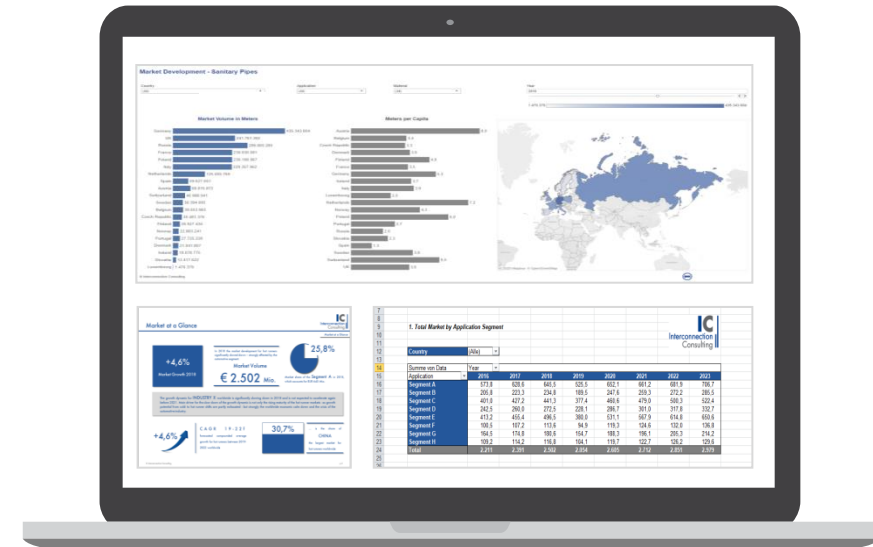
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

#### EXECUTIVE REPORTS

- PDF report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts

#### PIVOT-TABLES

- MS-Excel pivot-table including all raw data of the report
  - Market-Forecast pivot table
  - Competition pivot table

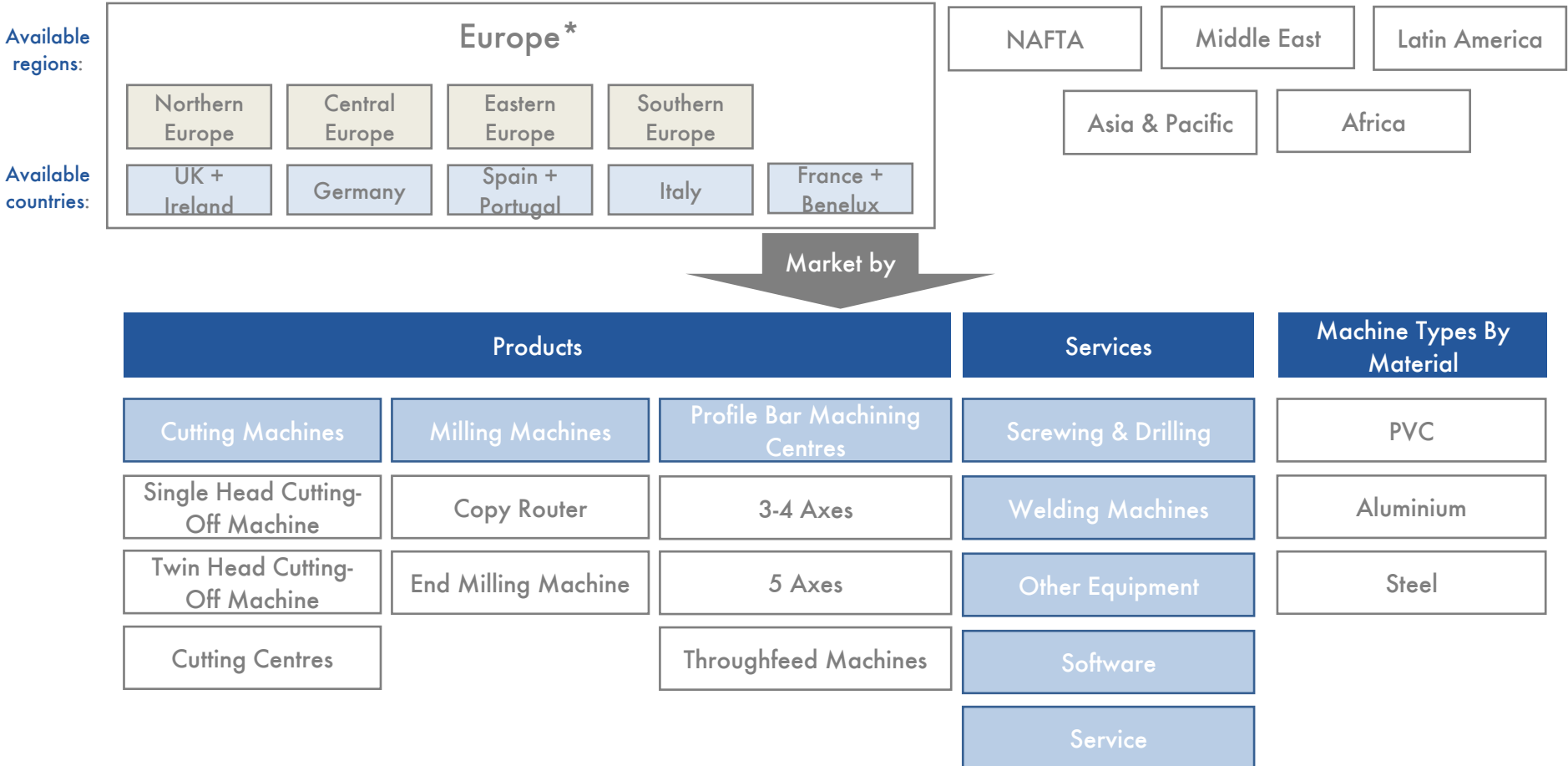


Market Intelligence Tool and Reports

Online  
Dashboards



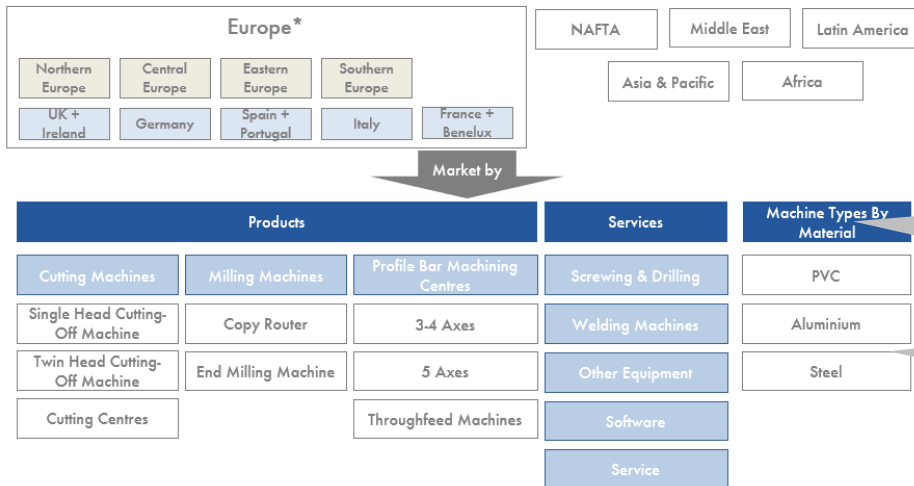
# Aluminium, PVC, Steel Profiles Machinery Worldwide 2024



For each segment the total market and market shares of the top players for the last two years and forecasts for the next three years are available in the study.

*\* It is possible to request single countries data. \*\*single countries shows data for macro segmentation while regions are splitted.*

# Market Structure - Interpretation



- Market data is available for each regions separately as well as aggregated for the worldwide package purchased.
- Each country report includes data for the two different broader segments (Machines types & Services & Machines divided by material) separately as well as aggregated for the total market of profile machinery in terms of value and quantity. Products are in both variables while services just in value.
- Each product group is further broken down by various segments.
  - ⇒ For instance data for Machine by material includes data by three material classes (PVC – Aluminium - Steel)

Turnover is stated in 1000 €. Value = Net Turnover. No List Prices, Discounts Included.

## Product Groups

All product groups are measured in Euro. The following product groups are measured in terms of quantity and value.

### Cutting Machines

Single head cutting-off machines

A machine with horizontal blade feed and left loading side, pneumatic double side tilting of the cutting head in fixed positions.

Twin head cutting-off machines

Ideal for cutting aluminium and PVB bars in various thicknesses and at different angles. Specially for large profiles.

Cutting Centers

Automatic sawing center with saw blade extending to the front and 3CNC-controlled axes for cutting profile made of aluminium, PVC and non-ferrous metals.

### Milling Machines

Copy router

This machine copies the assembly that corresponds to the processability to open different channels independently of the copy assembly with profile gauges. Easy of use and safe.

End-milling machines

are specially designed for milling sets of profiles (both aluminium and vinyl) in which the cutter unit needs to be changed several times in the same set.

### Profile Bar machining centres

3-4 Axes

The machine is operable on three or four axes, simplifying the milling process. 3-axes machining is suitable for performing drilling and threaded holes in-line with an axis or creating planar milled profile. 4-axis works similar to the previous one but where a cutting tool extracts material from a workpiece and creates the desired geometry in the machined part. With 4-axes rotation is provided.

5 Axes

This machine adds an axis of rotation on the Y axis. This machine guarantees levels of multidimensional rotation and component movement help achieve precision, polished finish, and high delivery speeds.

Throughfeed machines

Automatic/semi automatic belt loading magazine for profiles. A high-precision and high-speed push-feed system with gripper for profile picking and conveying to a machining area.

## Services

All services are measured in Euro. The following product groups are measured in terms of value.

Screwing & Drilling

With that machine you can carry out all vertical and horizontal holes.

Welding Machines

Welding machines or welding guns or welders are among the most essential tools for a welding professional.

Software

Progamation of the machines with an extra software service

Service

Maintance for the machines

## Machines By material

The segment machine type is measured in terms of value.

PVC

Alluminium

Steel

Regions	
Northern Europe	UK, Ireland, Scandinavia
Central Europe	Germany, Austria, Switzerland, Benelux, France, Liechtenstein
Southern Europe	Albania, Andorra, Bosnia-Herzegovina, Croatia, Gibraltar, Greece, Italy, Kosovo, Malta, Monte Carlo, Portugal, San Marino, Serbia & Montenegro, Slovenia, Spain
Eastern Europe	Hungary, Slovakia, Czech Republic, Poland, Romania, Bulgaria, Russia, Ukraine, Belarus, Estonia, Latvia, Lithuania, Moldova
NAFTA	USA, Canada, Mexico
Latin America	South- and Middle America (without USA , Canada & Mexico)
Asia-Pacific	China, India, Japan, Korea, South East Asia, Australia, Oceania
Middle East	Central Asia and the Caucasus, Turkey, Arab Peninsula, Levant, Iraq, Iran



# The Unique Mix of Methods and Approaches for Reliable Market Analysis



## SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



## Survey with Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



## Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**  
“Only who talks with the industry knows what’s going on!”

# Usability of the Market Intelligence Tool

## Let's Put it in a Video...



# The Market Intelligence Tool

## Dashboards - The Best Way to Work with Data

A picture says more  
than 1000 words

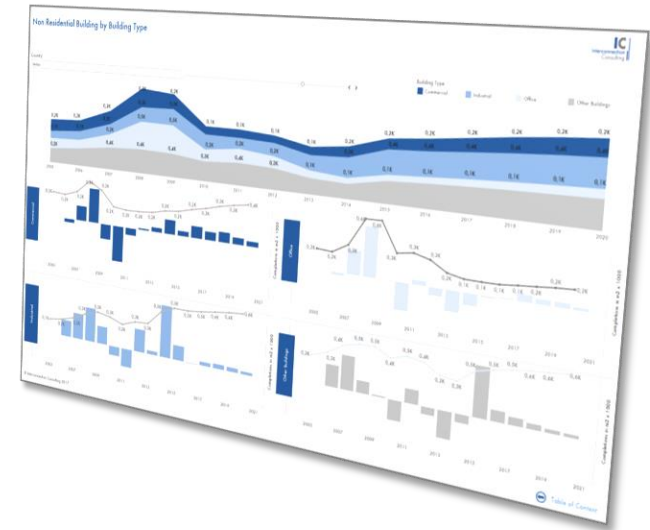
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive  
Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

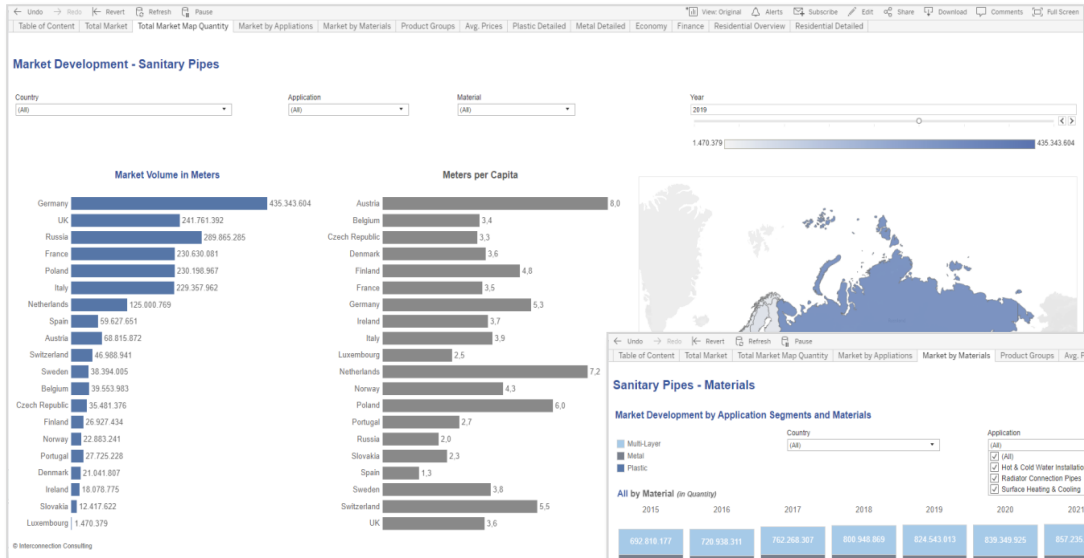
Easy online  
accessability

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file

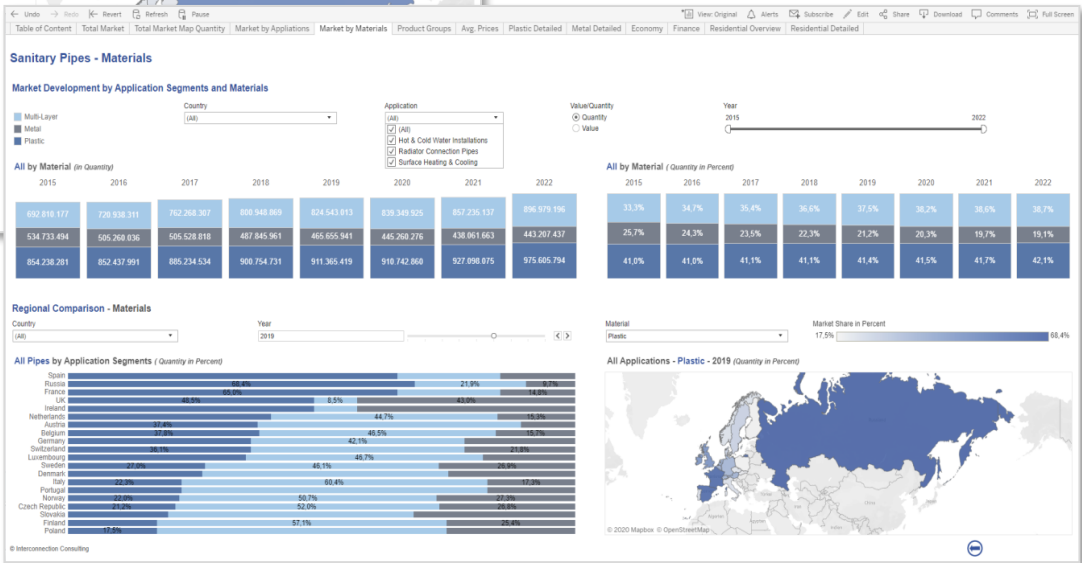


*In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is waived as well as for any subscription order exceeding 2 countries or regions. For all other options, price for Tableau cockpit costs € 500,-.*

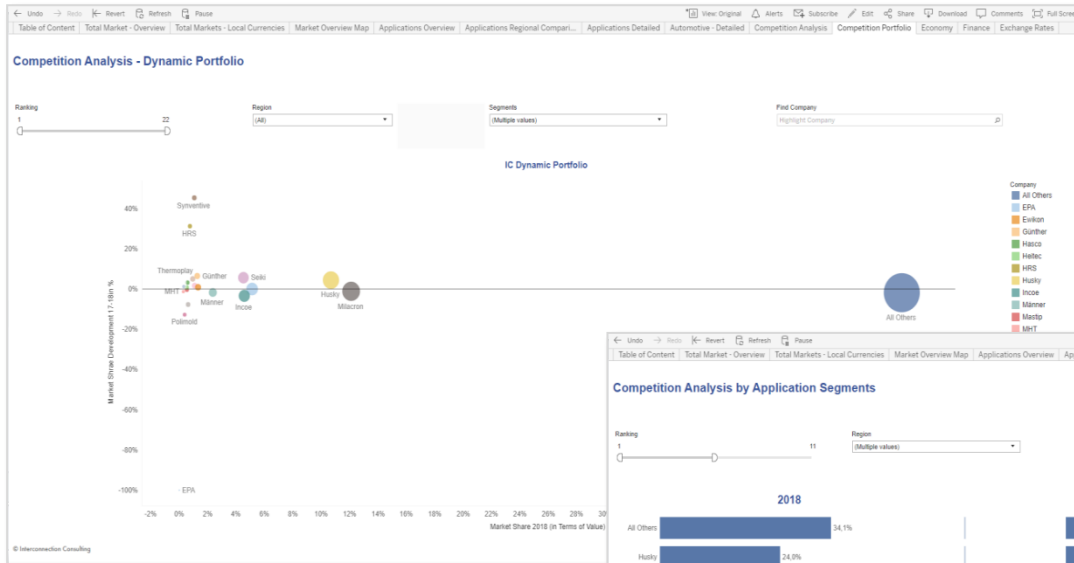
# Sample Cockpits for Market Analysis Data



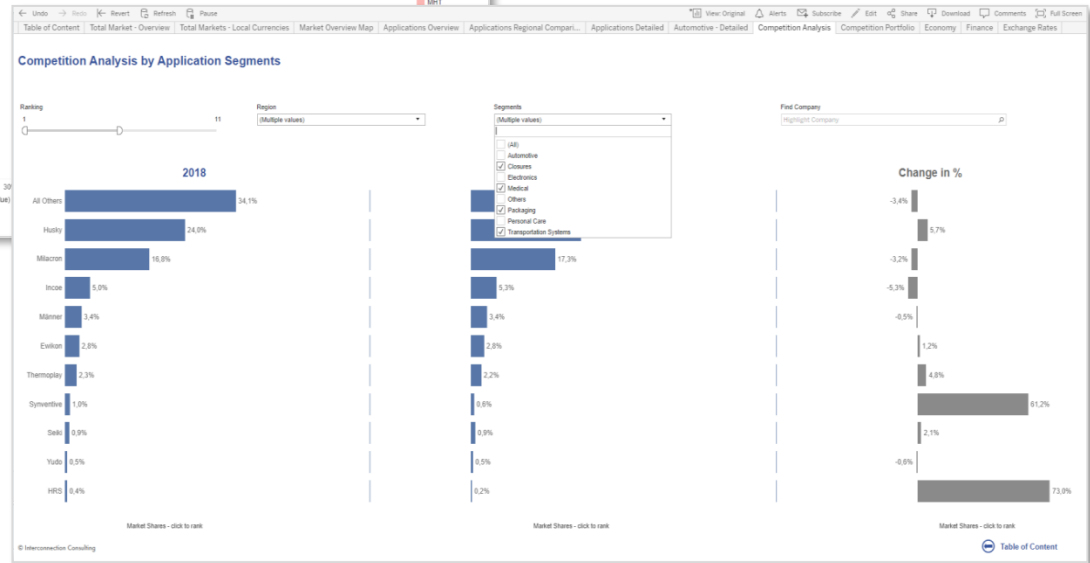
*This chart contains fictive data*



# Sample Cockpits for Competition Data

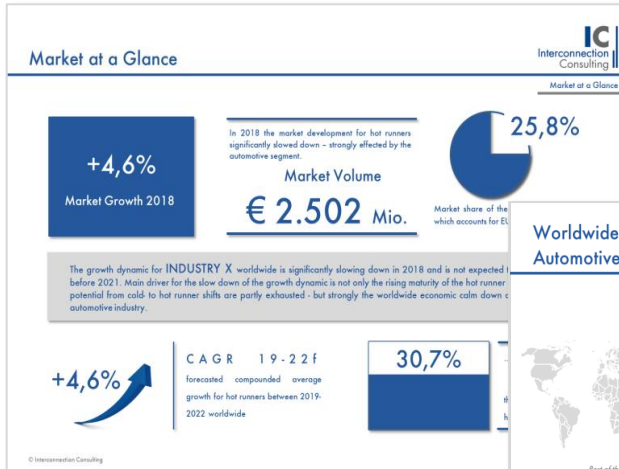


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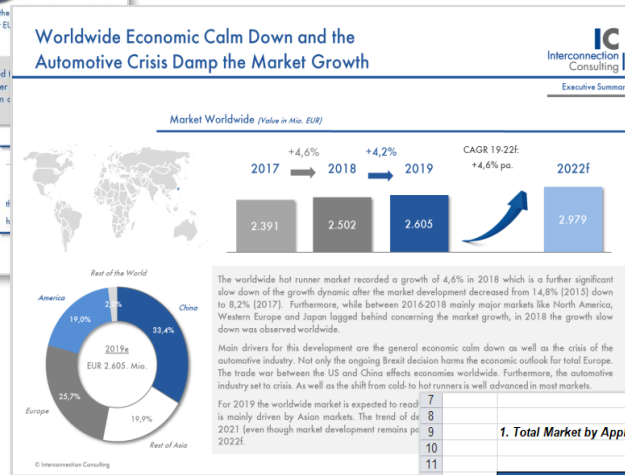


# Additional Deliverables

## Executive Summary and Pivot-Tables



Executive Summary as PDF (fictive data)



Executive Summary as PDF (fictive data)

1. Total Market by Application Segment

Country	Year	2016	2017	2018	2019	2020	2021	2022	2023
Segment A		573,8	628,6	645,5	525,5	652,1	661,2	681,9	706,7
Segment B		205,8	223,3	234,8	189,5	247,6	259,3	272,2	285,5
Segment C		401,0	427,2	441,3	377,4	460,6	479,0	500,3	522,4
Segment D		242,5	260,0	272,5	228,1	286,7	301,0	317,8	332,7
Segment E		413,2	455,4	496,5	380,0	531,1	567,9	614,8	650,6
Segment F		100,5	107,2	113,6	94,9	119,3	124,6	132,0	136,8
Segment G		164,5	174,8	180,6	154,7	188,3	196,1	205,3	214,2
Segment H		109,2	114,2	116,8	104,1	119,7	122,7	126,2	129,6
Total		2.211	2.391	2.502	2.054	2.605	2.712	2.851	2.979

Pivot-Table including all raw data as MS-Excel file (fictive data)

# Content of the Report

## Overview of the Included Dashboards

### TOTAL MARKET

- Total Market – Regional Comparison
- Total Market Development by Regions

### MACHINES TYPES & SERVICES

- Regional Market Development by Machines in Terms of Value and Quantity (in absolute figures and percent), Services just in Value
- Regional Comparison of Machines & Services Shares
- Average Prices for Machines – Development by Region and Regional Comparison

### MACHINE TYPES BY MATERIAL

- Regional Market Development by Machine Type By Material in Terms of Value
- Regional Comparison of Machine Type By Material Market Shares

### COMPETITION ANALYSIS

- Market Shares of the top players for 2023/22
- Market Shares on the total market in value
- Market Shares per product groups and segments in quantity

### MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.

# Investment Plan for Your Market Research


IC Market Tracking® Aluminium, PVC, Steel Profiles Machinery Worldwide 2024

Prices & Conditions

	Subscriber* €	Single Issue €
Worldwide**	15.999,-	+25% for Single Issues
Europe Total**	9.999,-	
Single region**	3.500,-	

Worldwide Regions	Europe regions	Latin America	Africa		
	NAFTA	Asia-Pacific	Middle East		
Europe Regions	Northern Europe	Central Europe	Eastern Europe	Southern Europe	
	UK + Ireland	Germany	Spain + Portugal	Italy	France + Benelux



\* **Subscription:** 25% 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 automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.

\*\* Package Price taking the scale of discounts already into account.

In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is included as well as for any subscription order exceeding 2 countries or regions. For all other options, license costs for Tableau cockpits are € 500,-/license.



*„IC is a constant tutor in the evaluation of markets and offers a helpful decision basis.“*

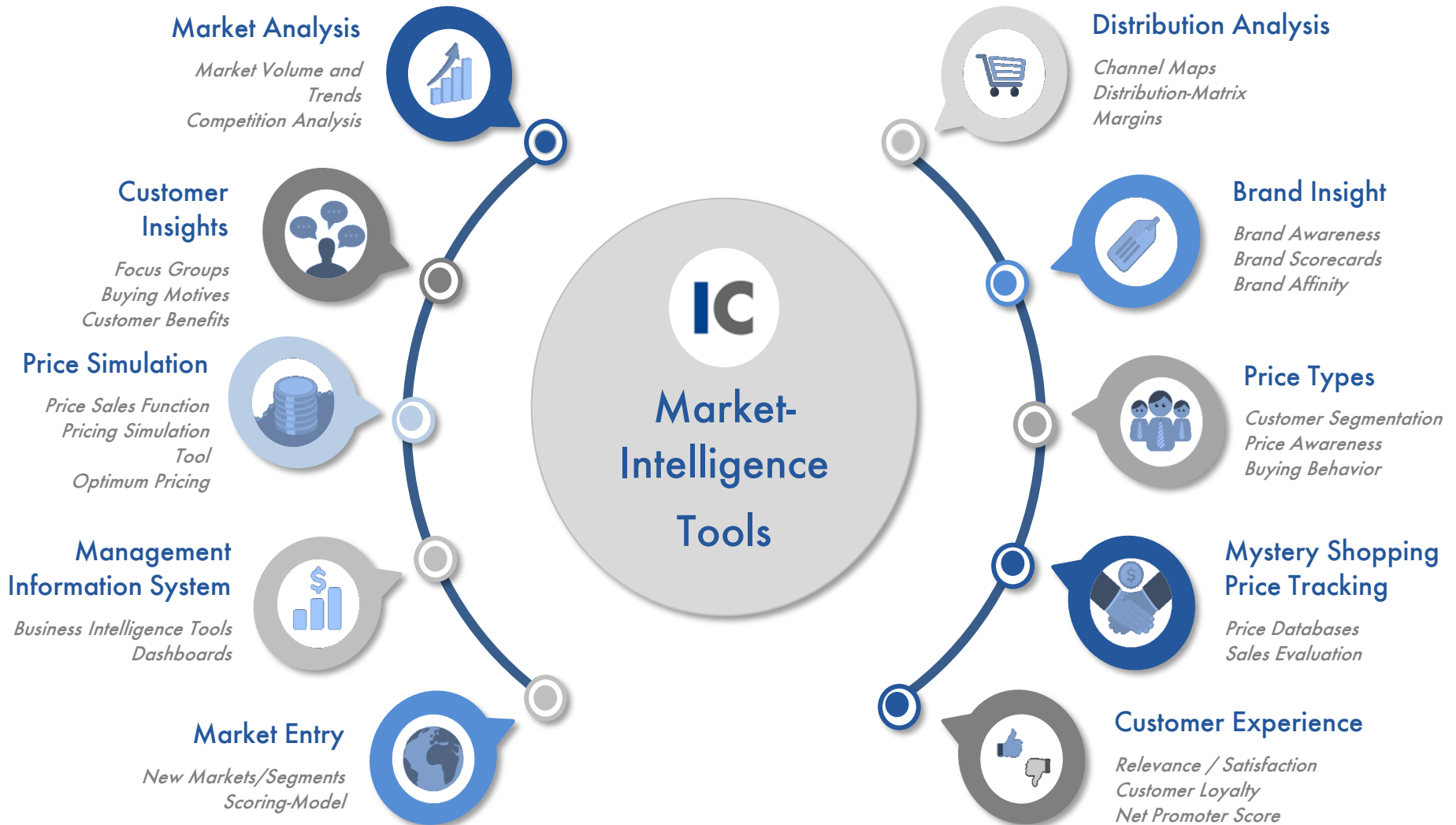
Herr Bernd Blümmers  
General Manager, Saint-Gobain Solar Systems Central Europe



# Interconnection Provides Data for Corporate Decisions



# Our Market-Intelligence Tools



In case of any questions  
please do not hesitate to contact us!

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we show you the way