The Hollow Core Industry in Germany

An Overview by Matthias König

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Friendly economic prospects showing good framework conditions for construction industry
Phase shifting between GDP and new construction output impacts growth in the coming years.
New Construction Output - General Trend

Change in new construction output in percentage terms

- New residential
- New non-residential
- New civil engineering

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Development New Residential Market

Development of building permissions (Number of flats compared to previous year in %)

- Eigenhelme (Single Houses)
  - 2012: -4.5
  - 2013: 9.7
  - 2014: 6.4

- Mehrfamilienhäuser (Blocks of Flats)
  - 2012: 14.0
  - 2013: 17.2
  - 2014: 15.2

- Sonstige Wohnungen (Other Flats)
  - 2012: -1.0
  - 2013: 3.9
  - 2014: 8.8

- Strong growth in housing segments but weak market position of hollow core slabs

Development New Non – Residential Market

Development building permissions (Cubature Mio. cbm compared to previous year in %)

- Industrial Buildings
- Commercial Buildings
- Agricultural Buildings

- Strong growth in main market segments of hollow core slabs in Germany

Market Segmentation - Hollow Core Floors
Technology Segmentation - Flooring
The Competitive Landscape of Germany

- Highly competitive landscape
- Excessive concentration of plants in Eastern Germany
- Potential in Southern Germany
Since more than 20 years the German industry is organized within two associations:

- Bundesverband Spannbeton-Fertigdecken e.V. (BVSF) is a body which is making lobbying for the industry, technical work and public relations to the official bodies, structural engineers and architects.
- BVSF represents approx. 49% of the production capacity for HCS in Germany.

Forschungsgesellschaft VMM-Spannbetonplatten GbR is a mainly technically driven organization, based on slip former technology of former Echo:

- VMM holds own approvals for all cross sections for HCS used in Germany manufactured with Echo equipment.
- Forschungsgesellschaft VMM represents approx. 18% of the production capacity for HCS in Germany.
DW Systembau GmbH – Key Figures

- Revenue: 22 M€
- Market Position: German market leader in HCS approx. 36 % Market Share
- Volume: 540 ksq m
- Employees: 120
- Plants: Schneverdingen, Luckau, Chemnitz, Meiningen (hired out)
- Headquarters: Schnevedingen, near Hamburg

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DW Systembau – Our Plants
Our Product Range – The BRESPA Family

**BRESPA® Hollow Core Floor**
Hollow core floors provide large span at low own weight. Standard thickness is from 150 mm to 400 mm.

**BRESPA® Massive Floor**
Prestressed massive floors are best suited for high single and line loads. Massive floor slabs are available in 150, 180 and 200 mm.

**BRESPA® Climate Floor**
Optimised cross section provides space for water bearing heating registers in the lower flange. Available in 200, 260 and 320 mm.

**BRESPA® Ventilation Floor**
After special treatment, voids can be utilised as air channels. Available from 200 mm slab thickness.

**BRESPA® Insulated Floor**
Slabs are cast directly on Polystyrene. Total thickness of slabs incl. insulation up to 400 mm.
The Hollow Core Industry in Germany

Thank you for your attention