



# **The Hollow Core Industry in Germany**

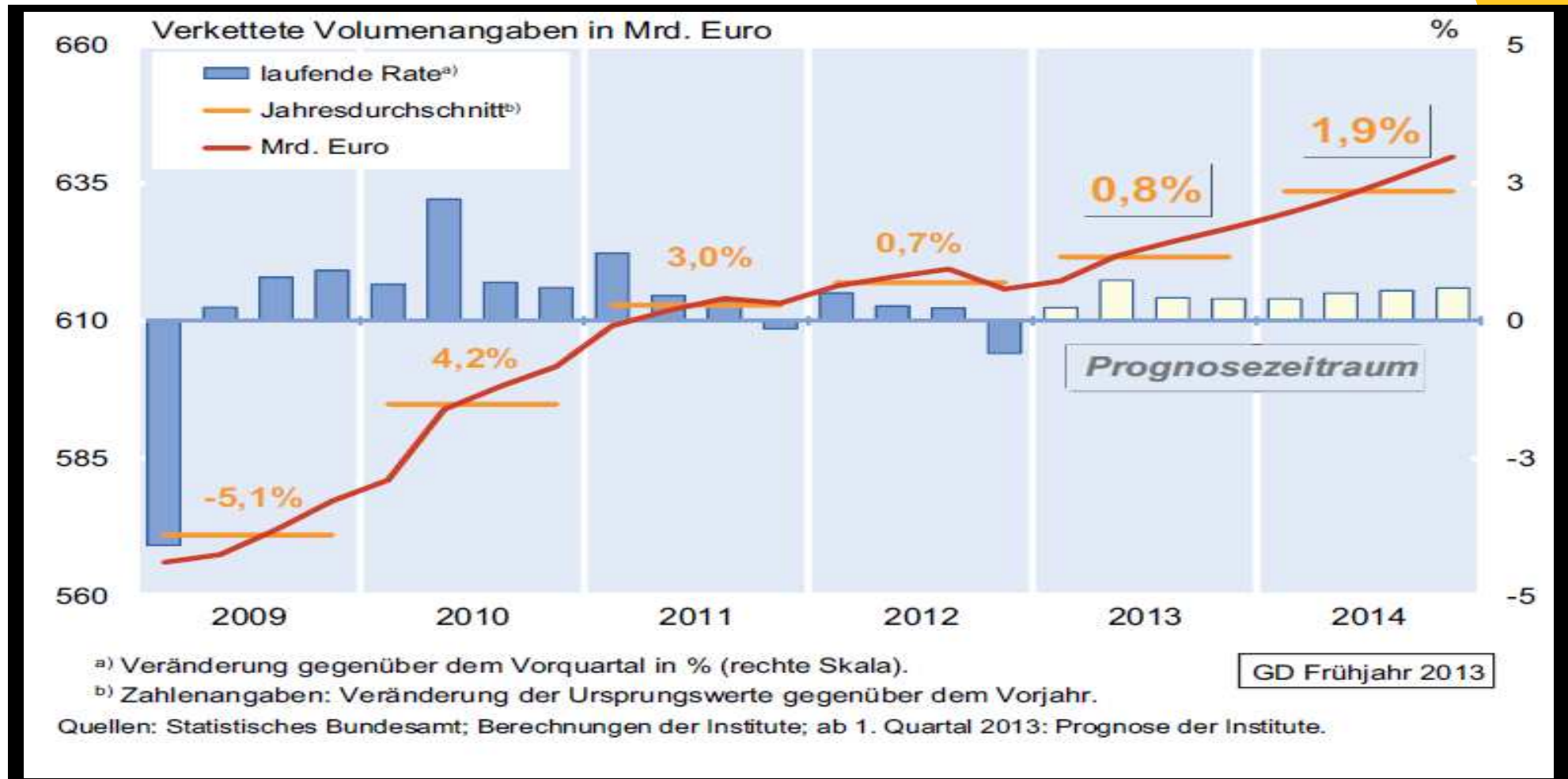
**An Overview by Matthias König**

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- The Economic Environment for New Construction in Germany
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- The Host – DW Systembau GmbH – At a glance

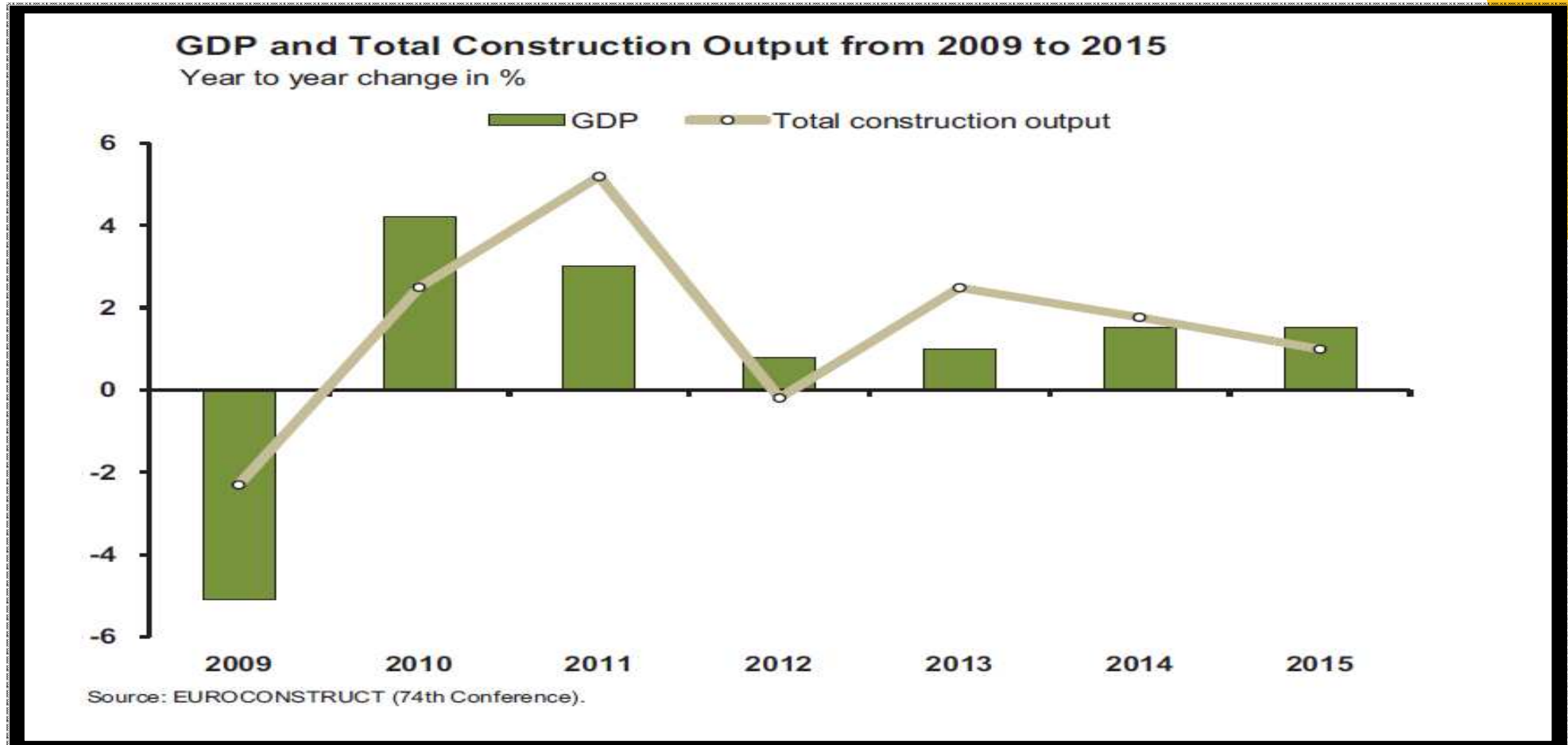


# GDP Development in Germany



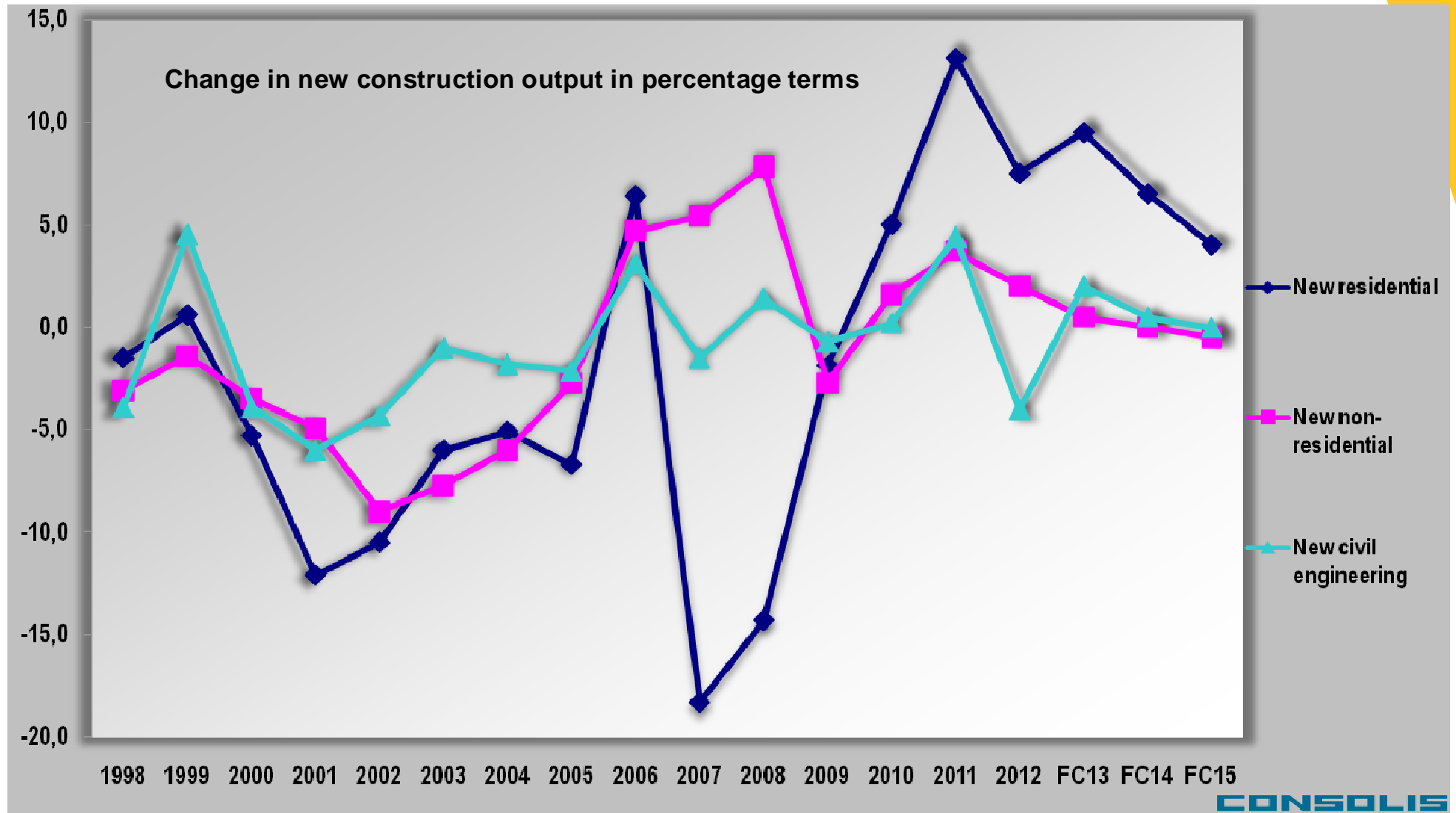
- Friendly economic prospects showing good framework conditions for construction industry

# GDP Development and Total Construction Output



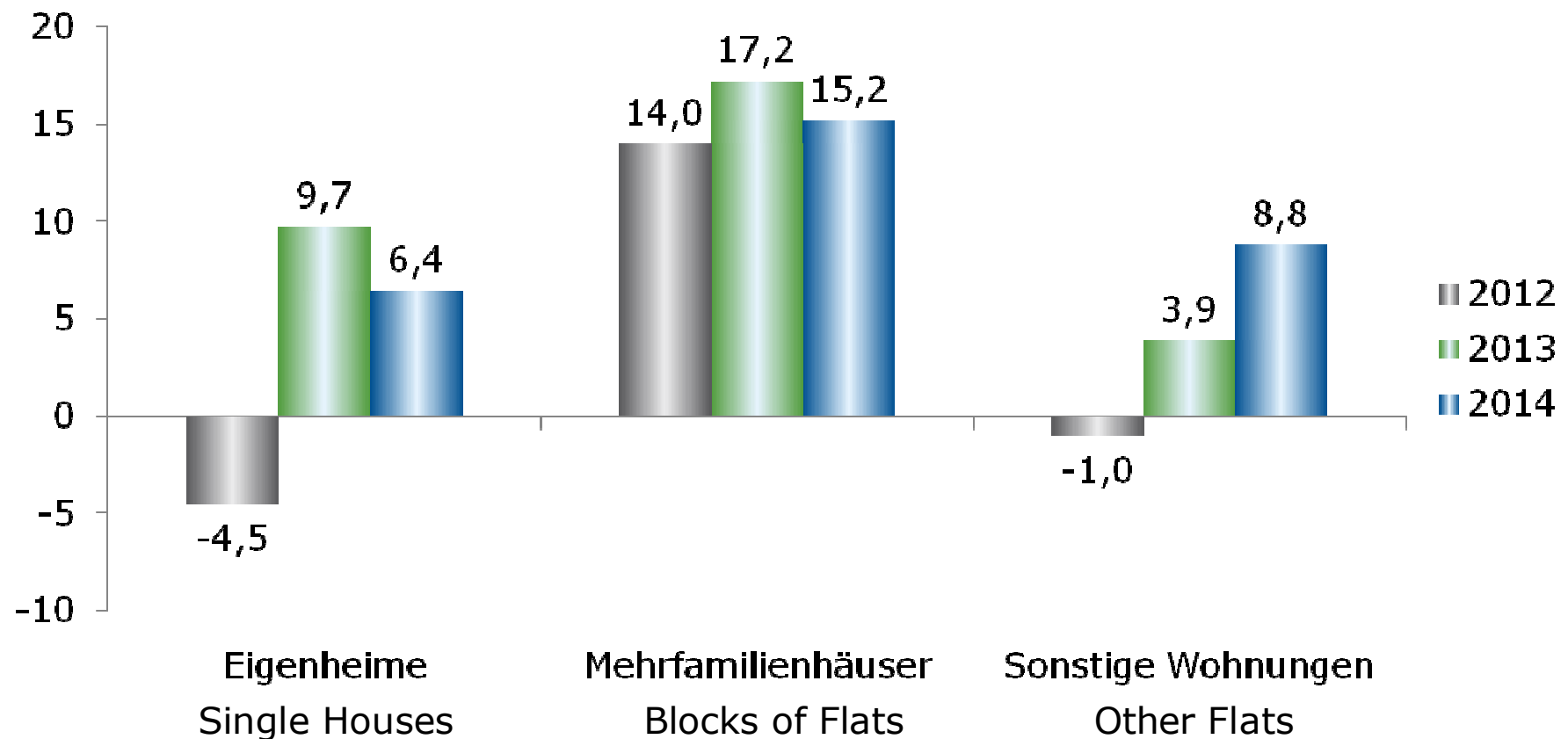
- Phase shifting between GDP and new construction output impacts growth in the coming years

# New Construction Output- General Trend



# Development New Residential Market

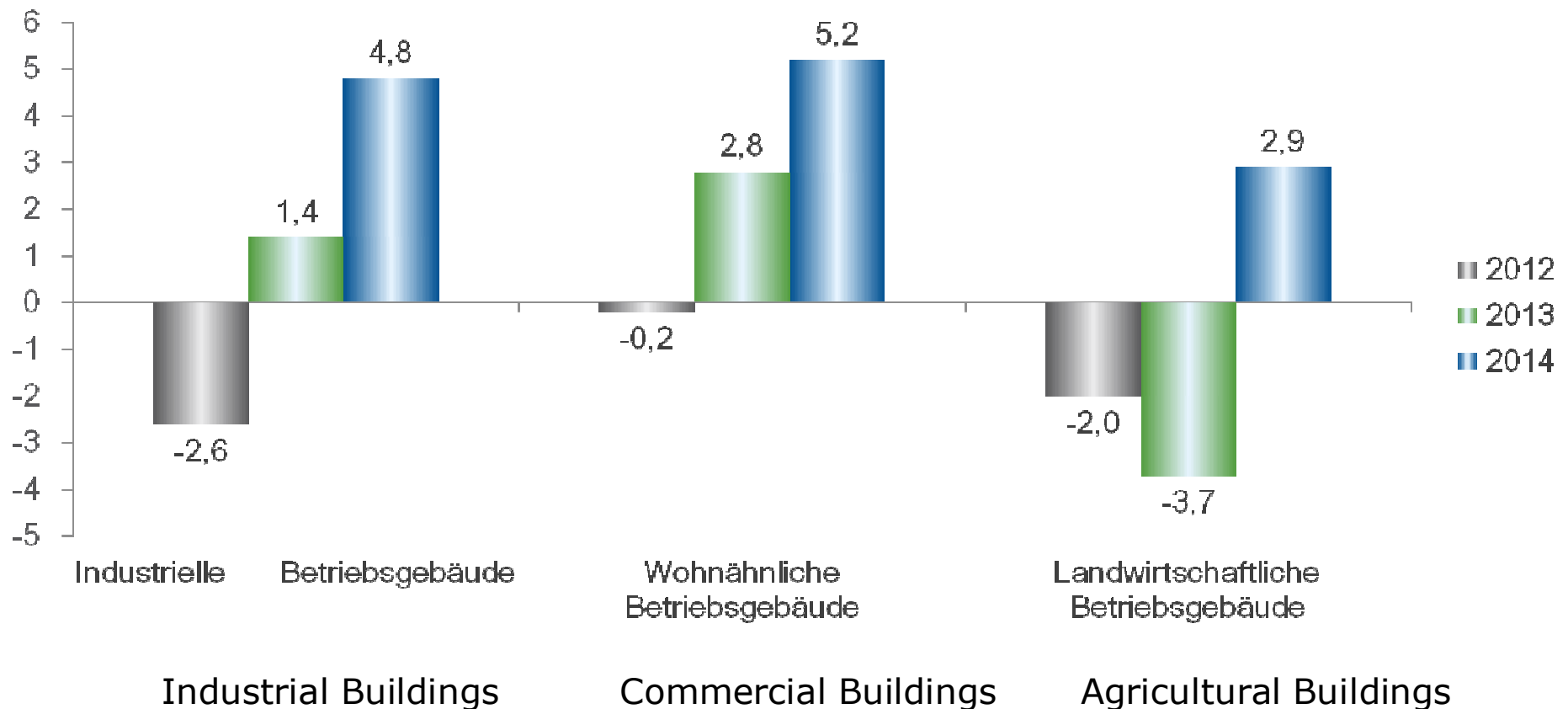
Development of building permissions (Number of flats compared to previous year in %)



- 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 %)



- 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

# Production Capacity of the German Industry

# Organization German Hollow Core Industry

- 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: Schneverdingen, near Hamburg



# 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**

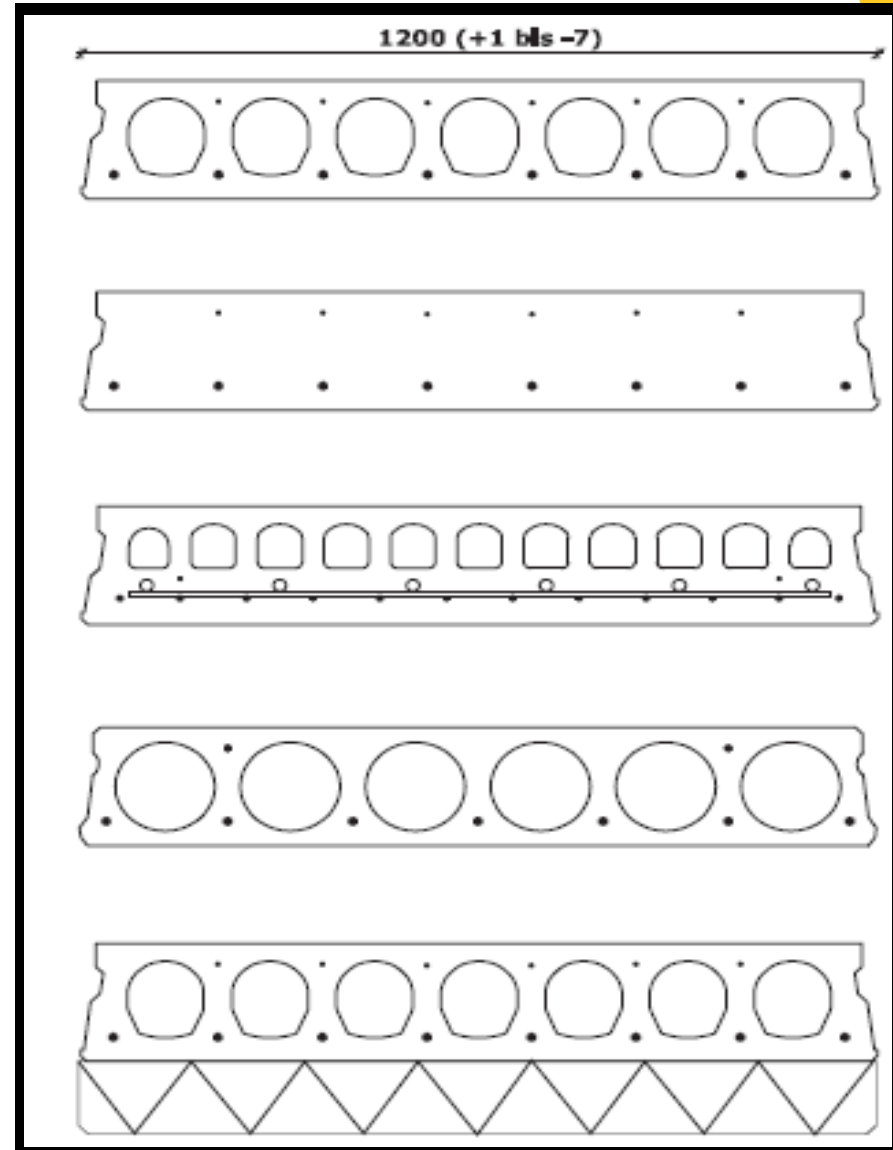
Optimised cross section provides space for water bearing heating registers in the lower flange. Available in 200, 260 and 320 mm.

## **BRESPA® Ventilation Floor**

Ater 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.





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**Thank you for your attention**



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