

# IPHA

## Analysis of the International Hollowcore Flooring Market

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# Background

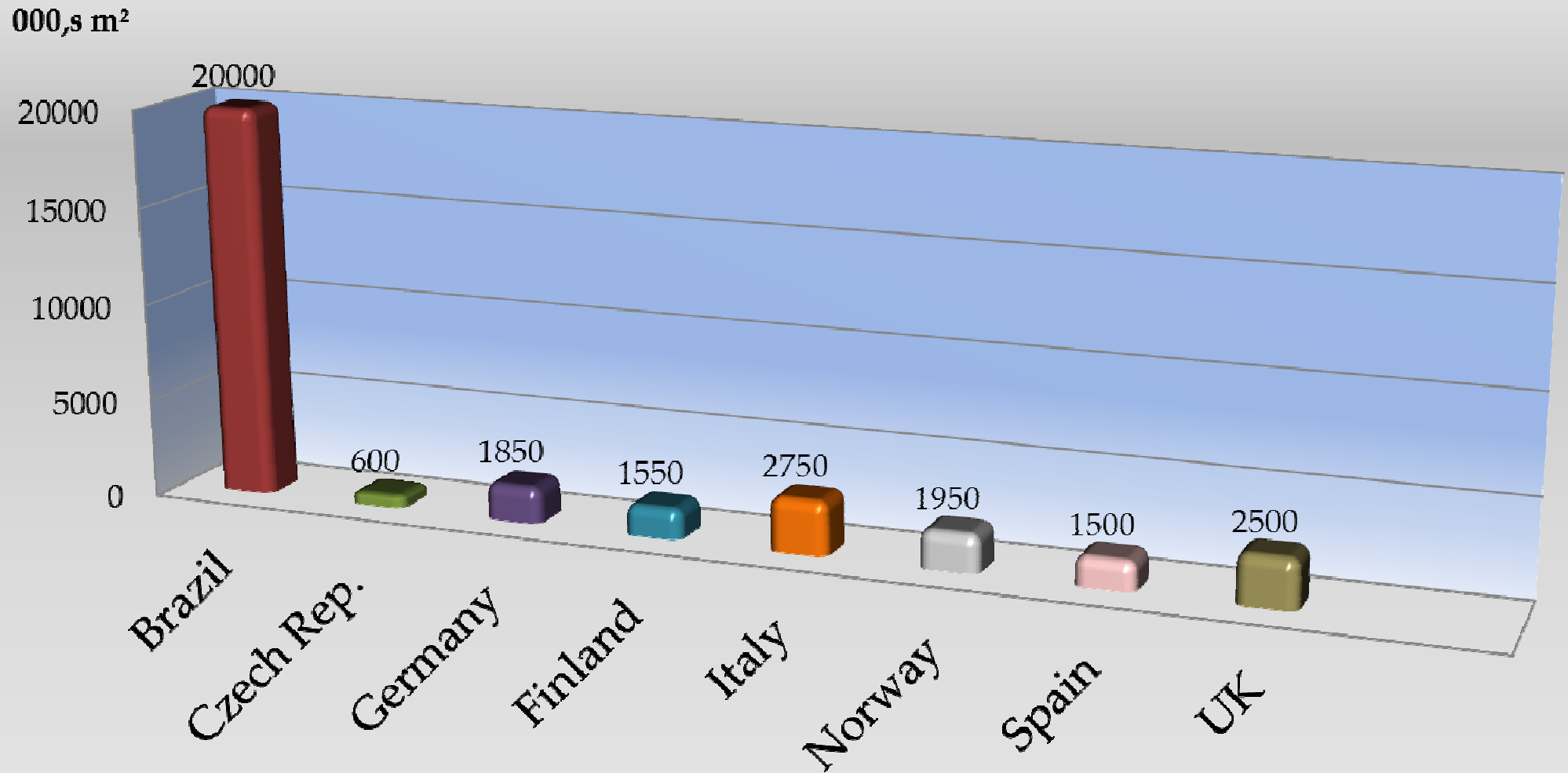
IPHA members contacted during February and March 2013 contributed to the following key questions?

- The size of the Hollowcore market
- Share of the Hollowcore market in ground and upper floors
- Share of competing products and systems
- Members' views on the main selling points for Hollowcore
- Types of customers that sales management call upon
- Relative importance of supply and fix Vs. Supply only
- How companies can increase sales

# Scope of Project

- To establish the volumes of Hollowcore being used Internationally
- Provide background information for discussion
- Assess the current market position of Hollowcore
- Analyse the success factors for Hollowcore
- Identify how and where sales of Hollowcore could be increased
- Identify best practice across International markets

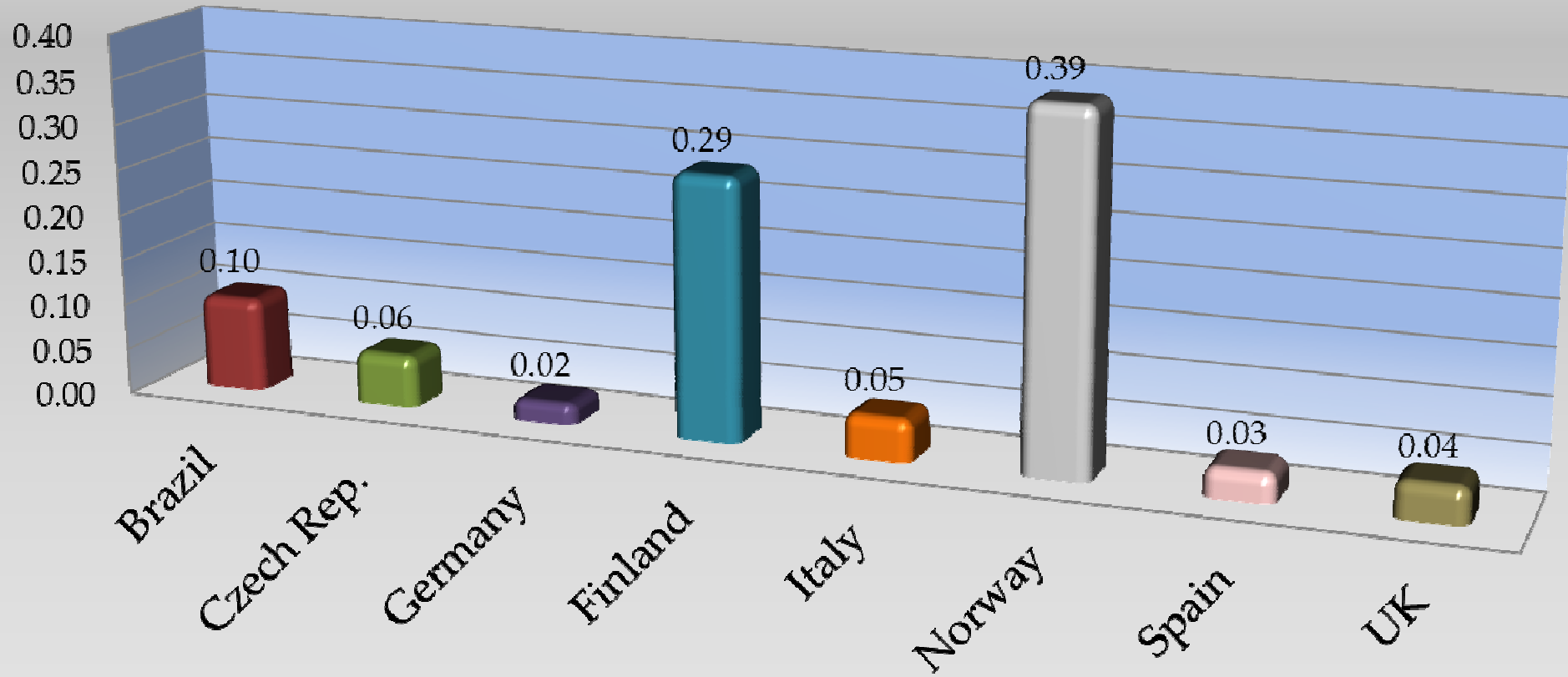
# Hollowcore flooring market by Country



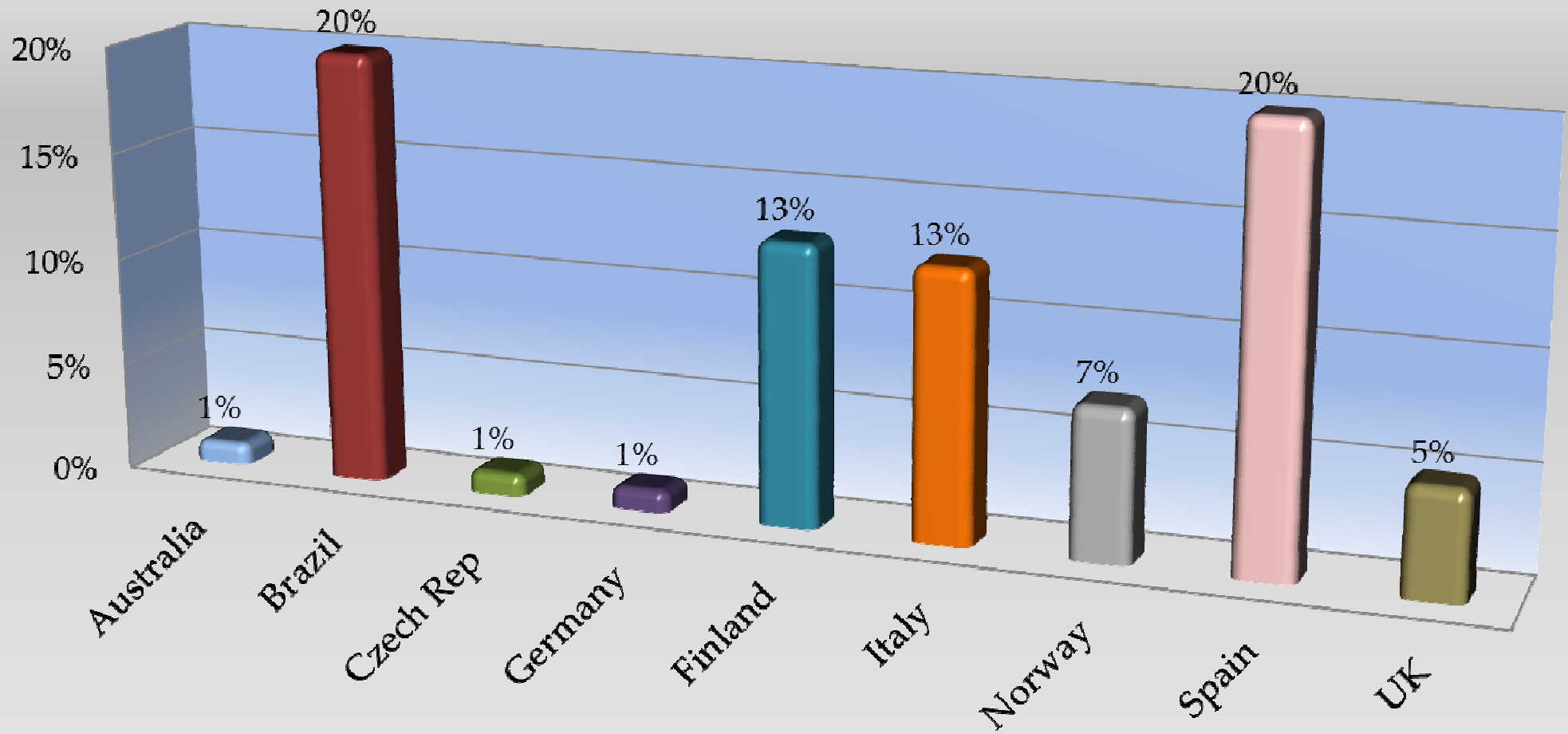
Estimated:

# Market per head of population

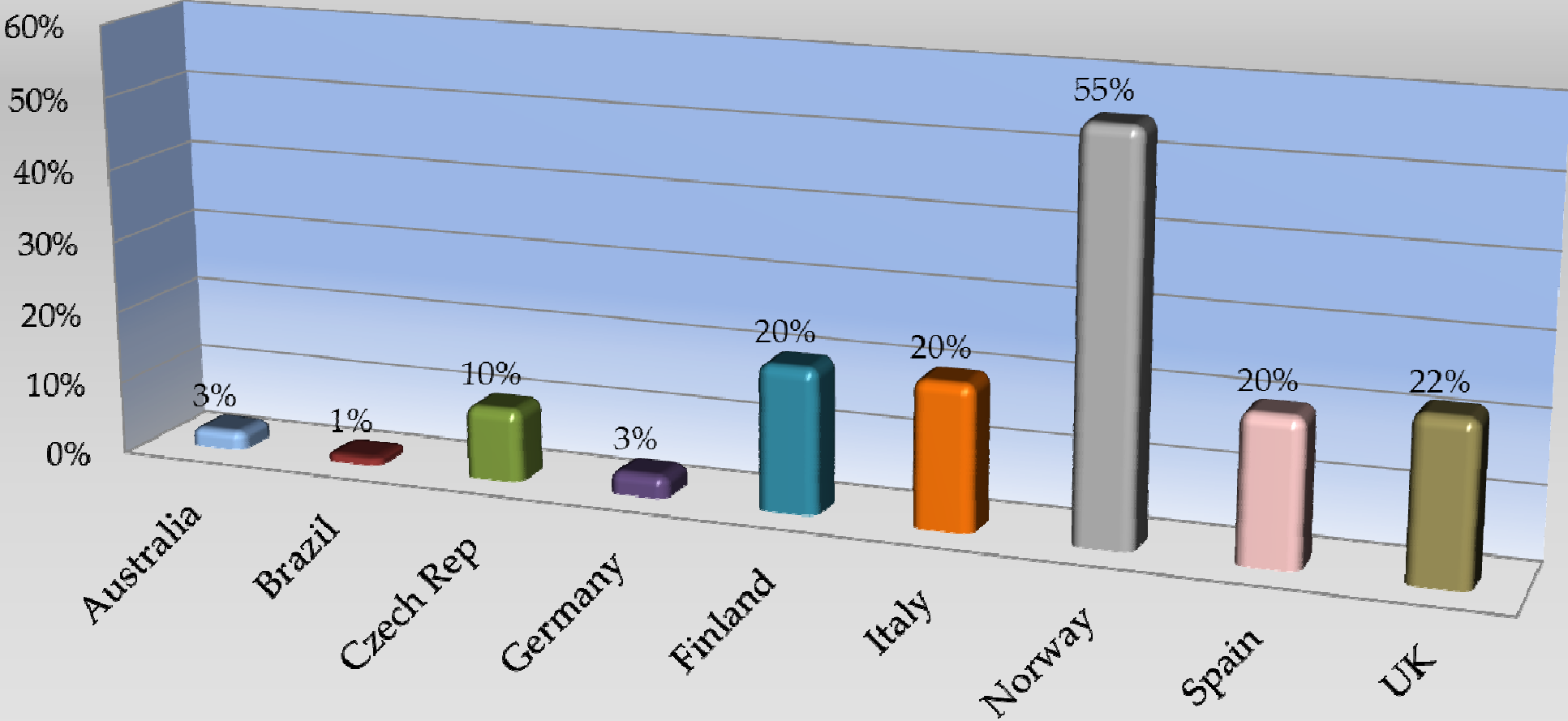
m<sup>2</sup> per million



# Hollowcore market - Ground floor

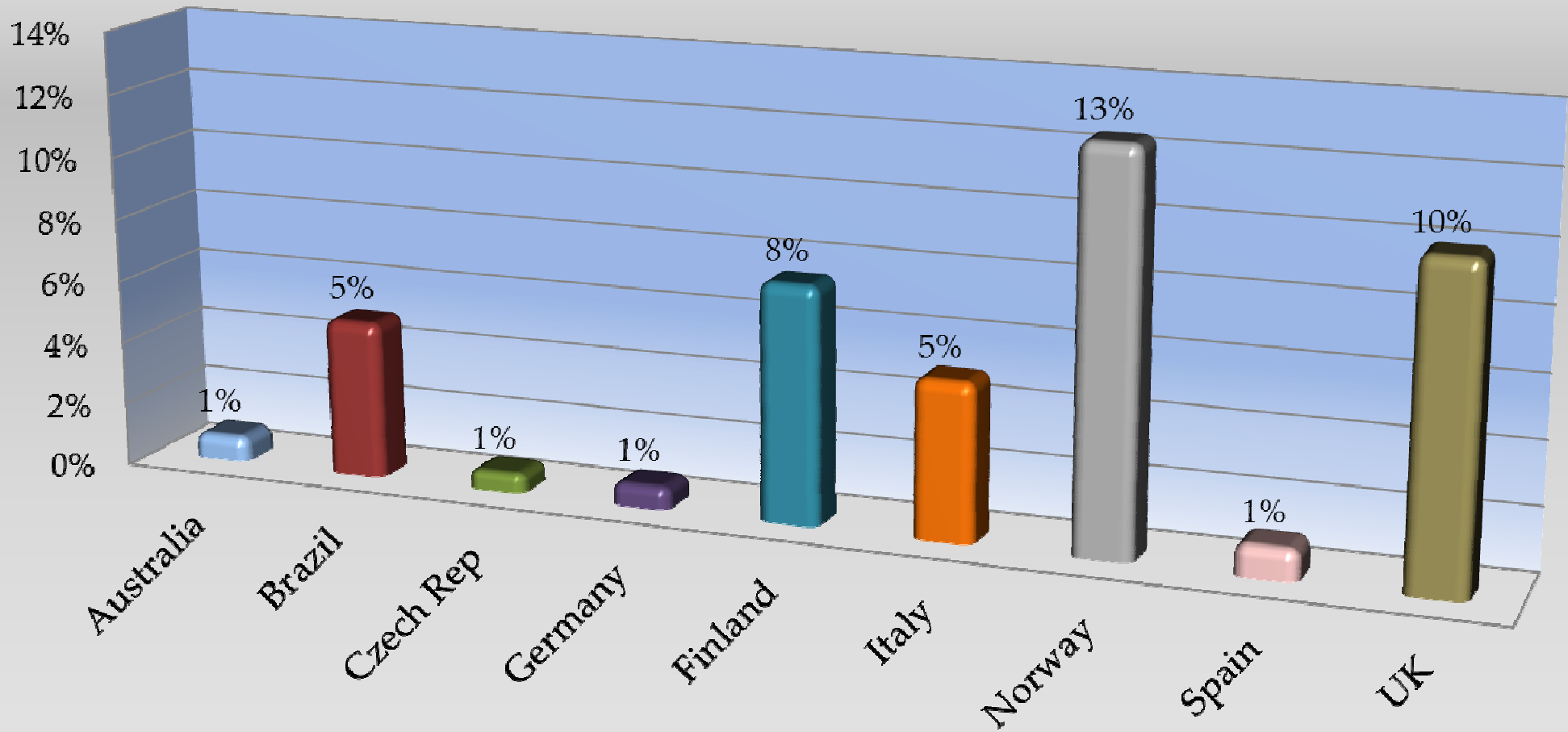


# Hollowcore market - Upper floor

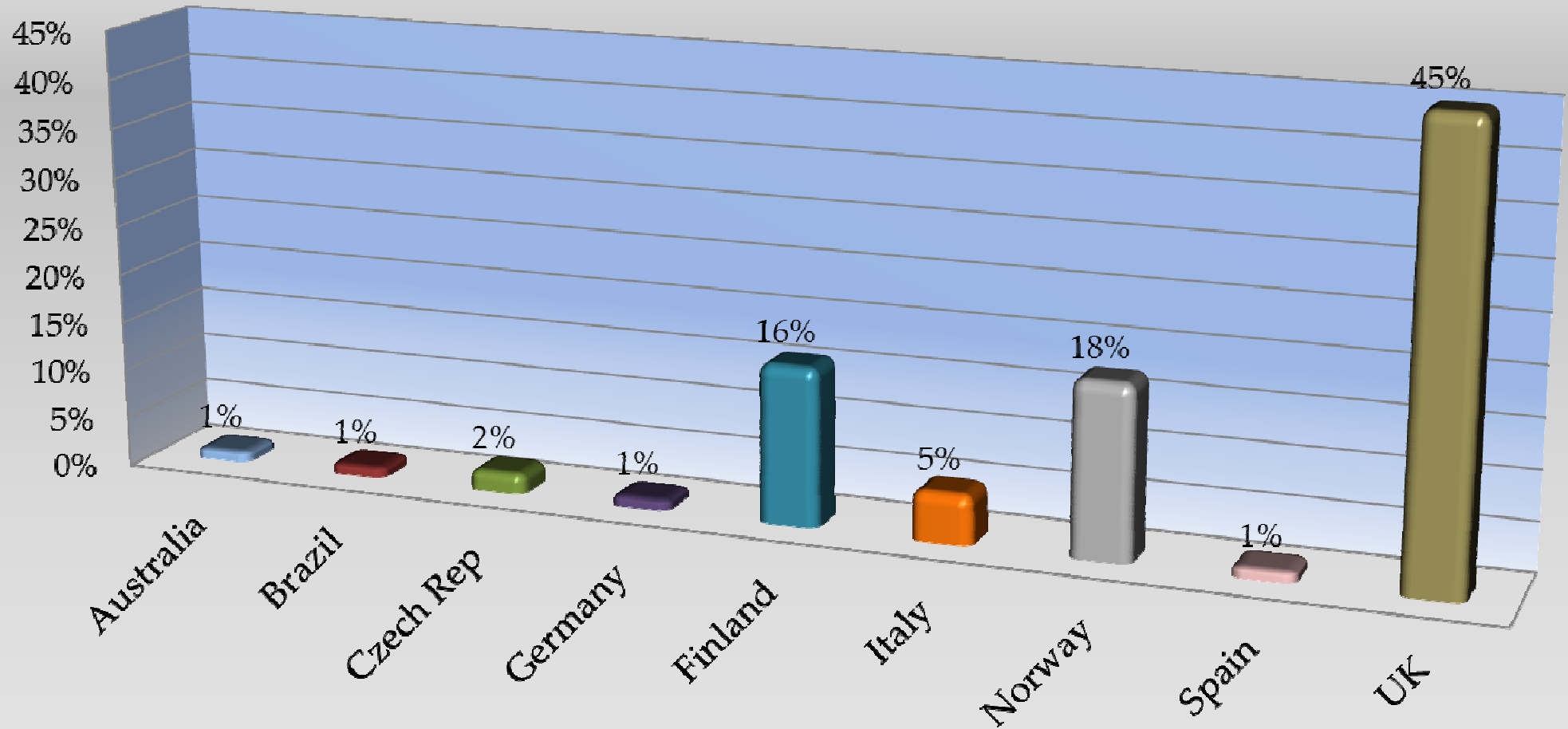




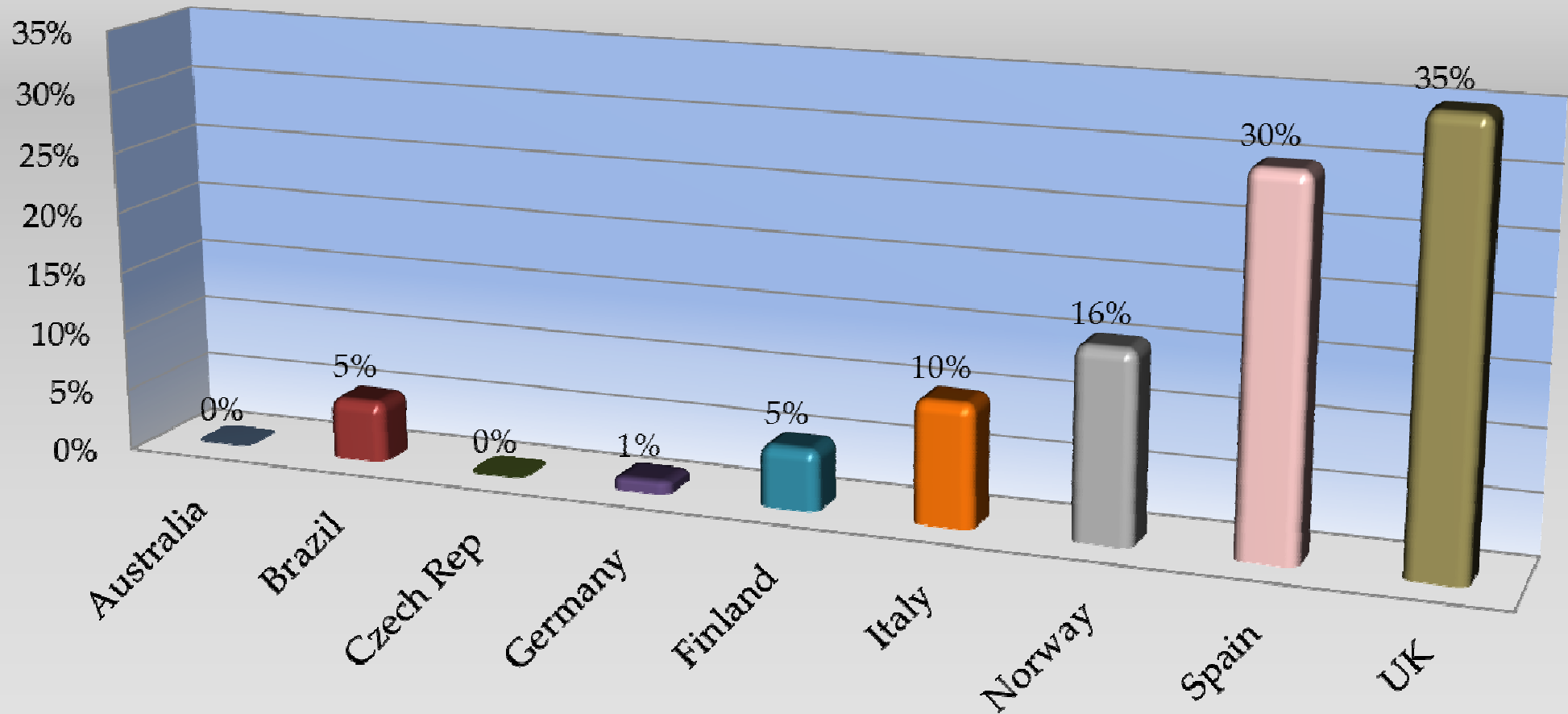
# Timber market - Ground floor



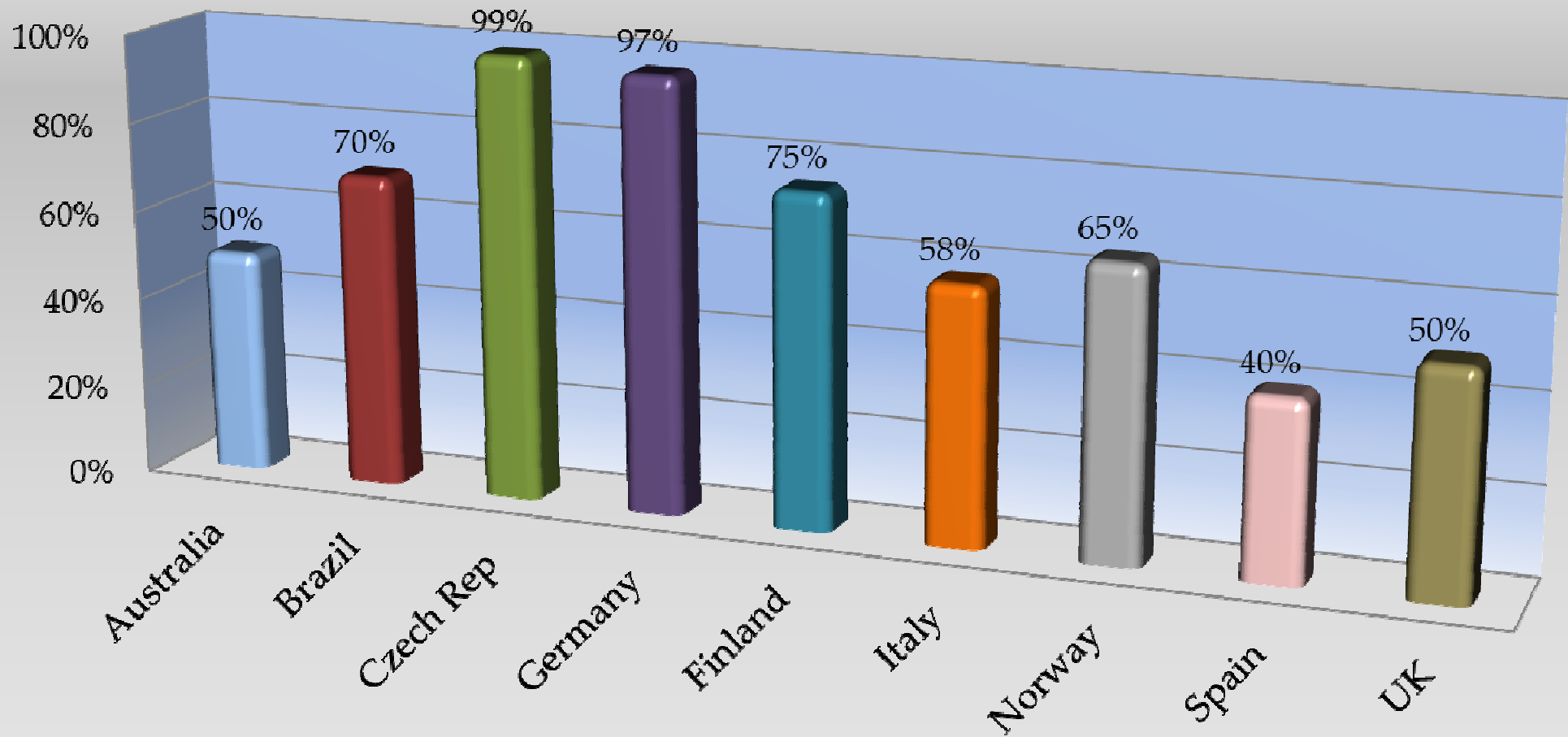
# Timber market - Upper floor



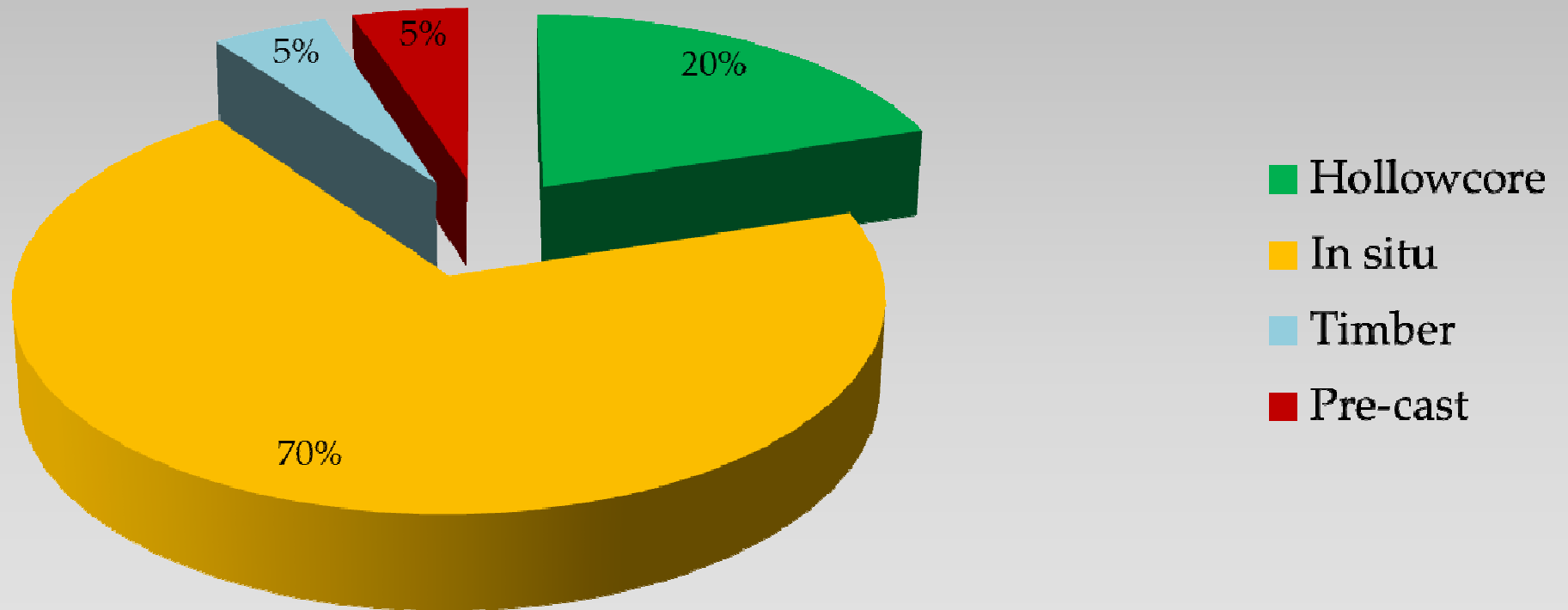
# Pre-cast market - Ground floor



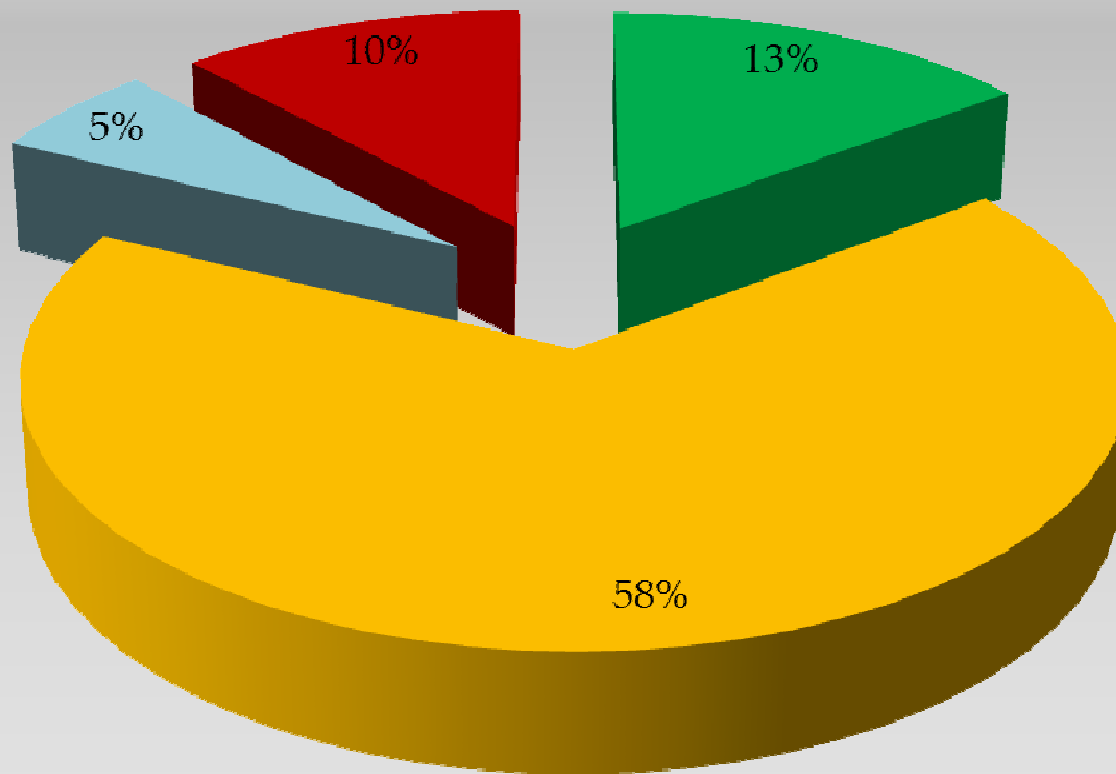
# Insitu market - Ground floor



# Brazil - Ground floor

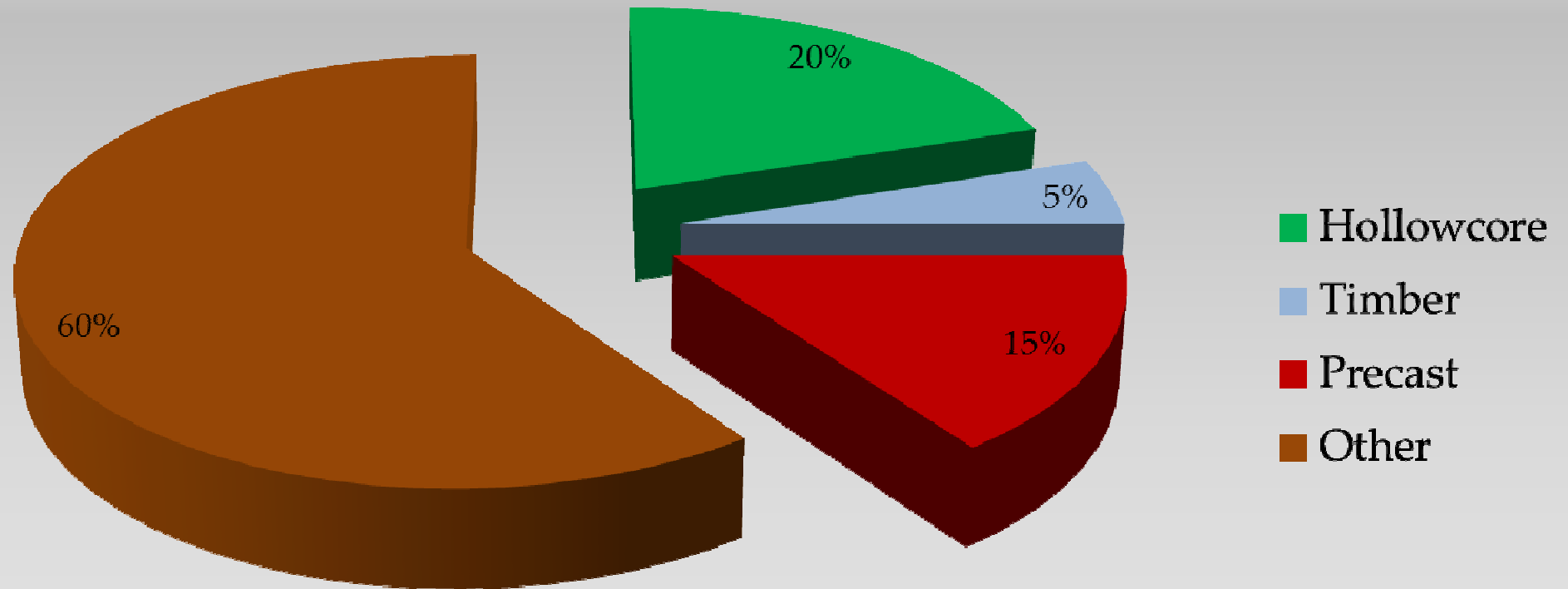


# Italy - Ground floor

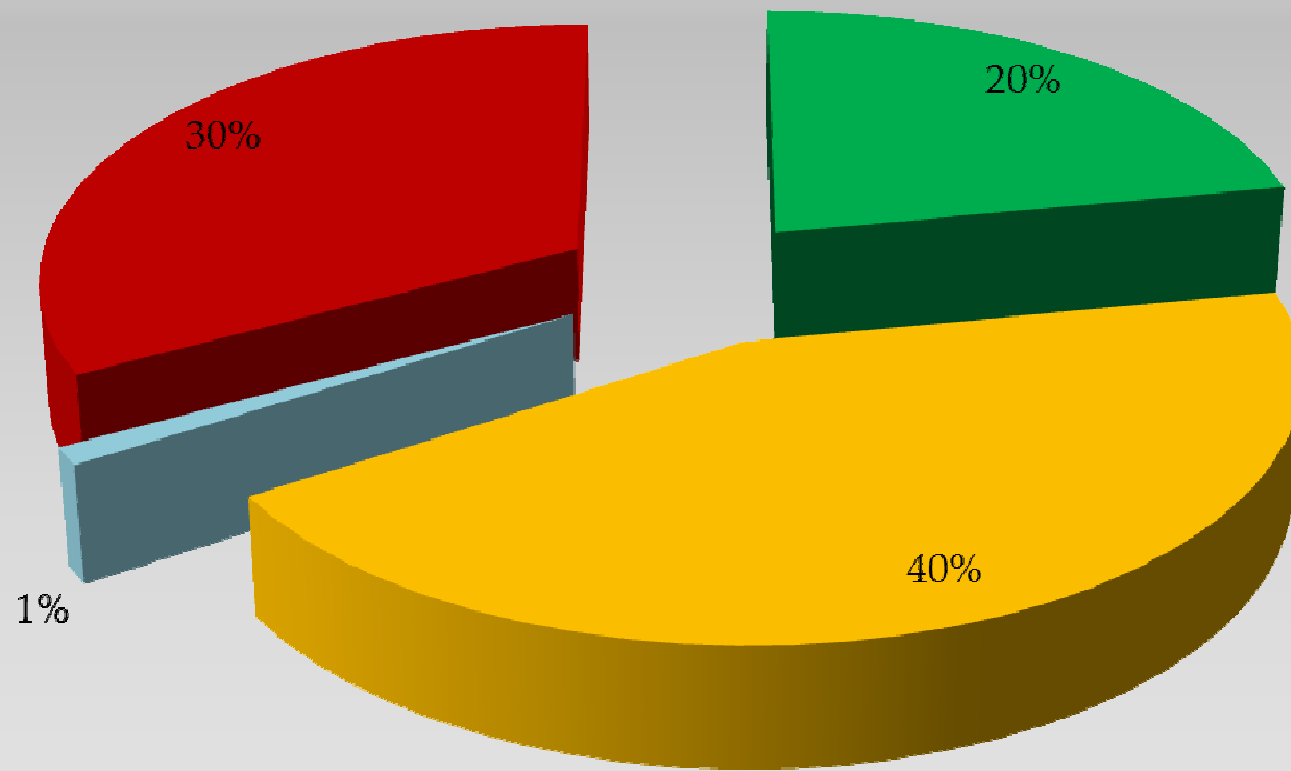


-  Hollowcore
-  In situ
-  Timber
-  Pre-cast

# Italy - Upper floor



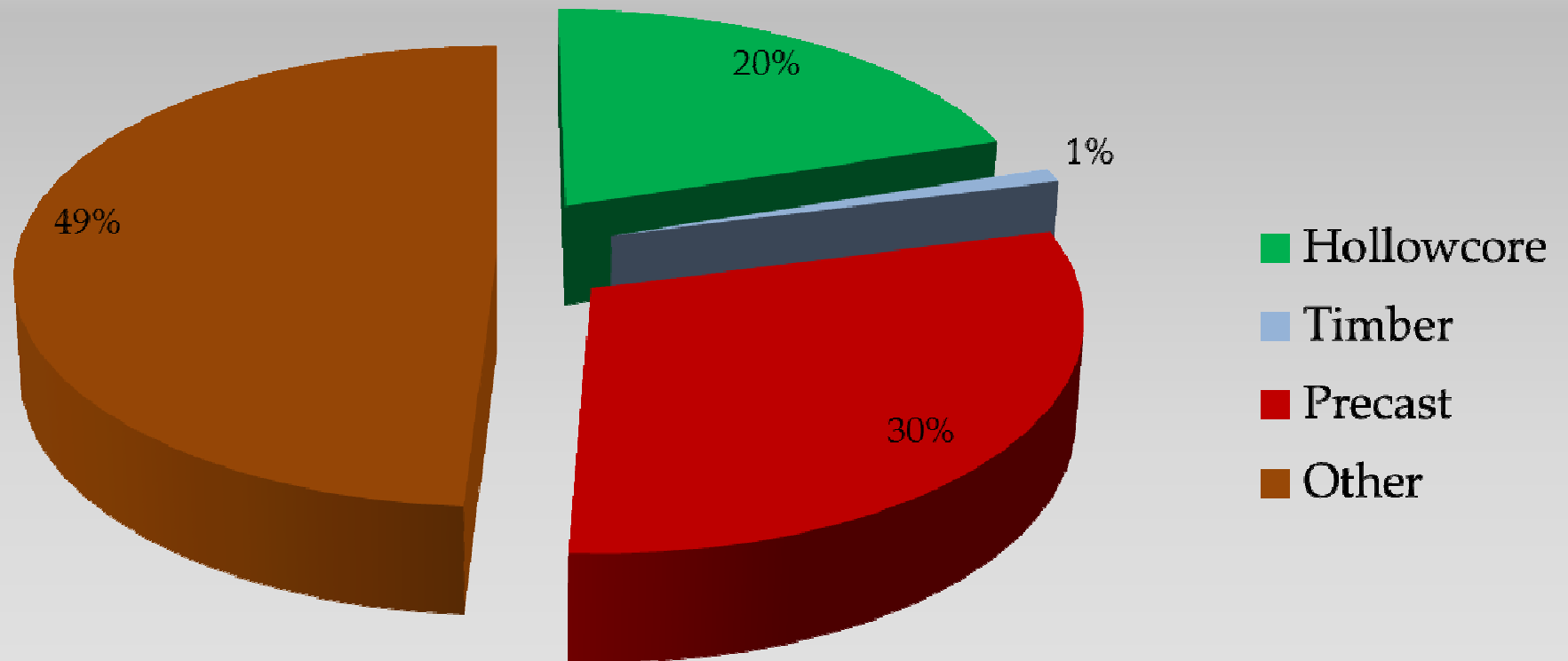
# Spain - Ground floor



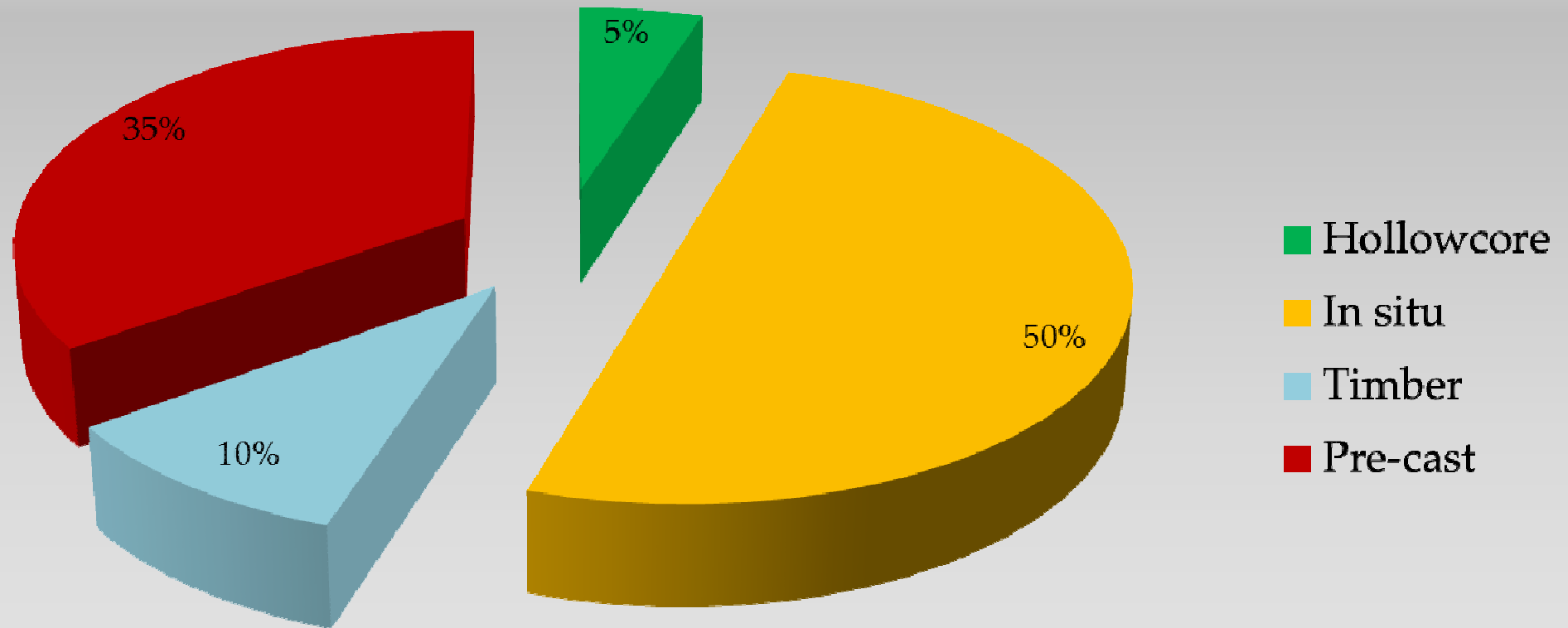
- Hollowcore
- In situ
- Timber
- Pre-cast



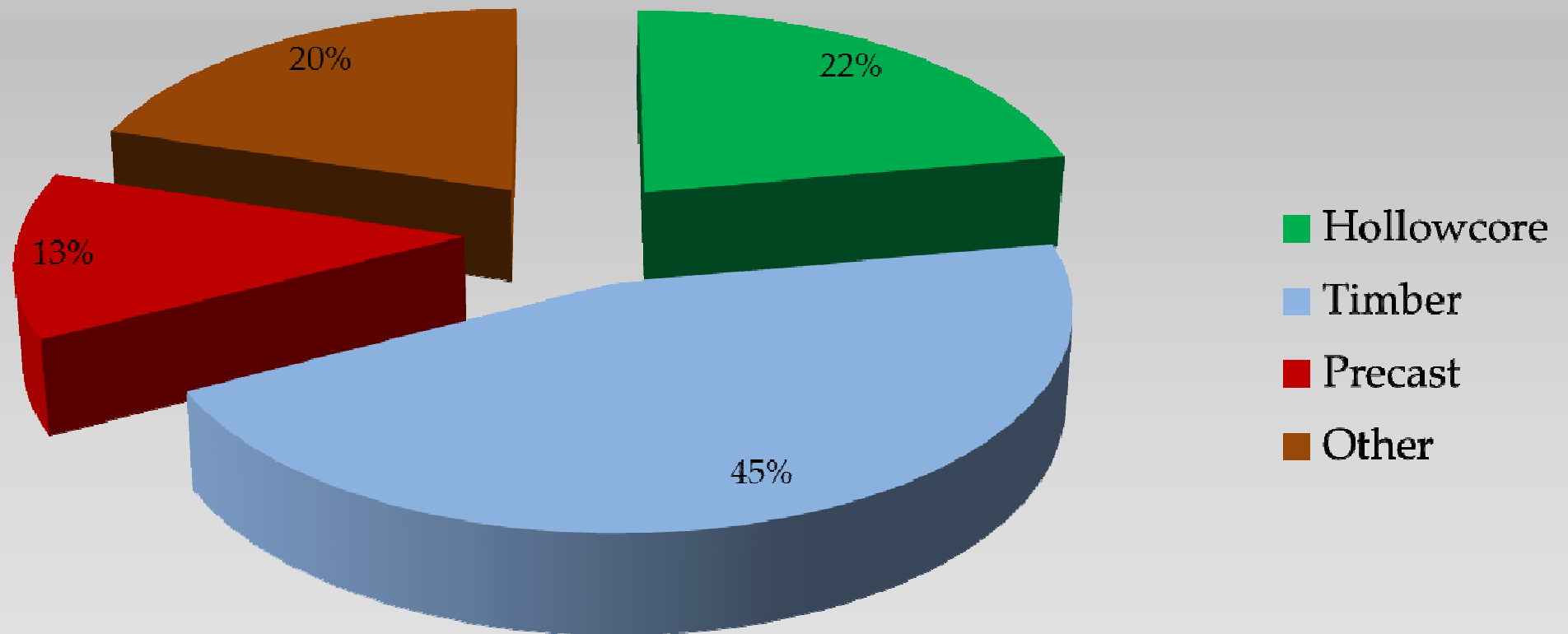
# Spain - Upper floor



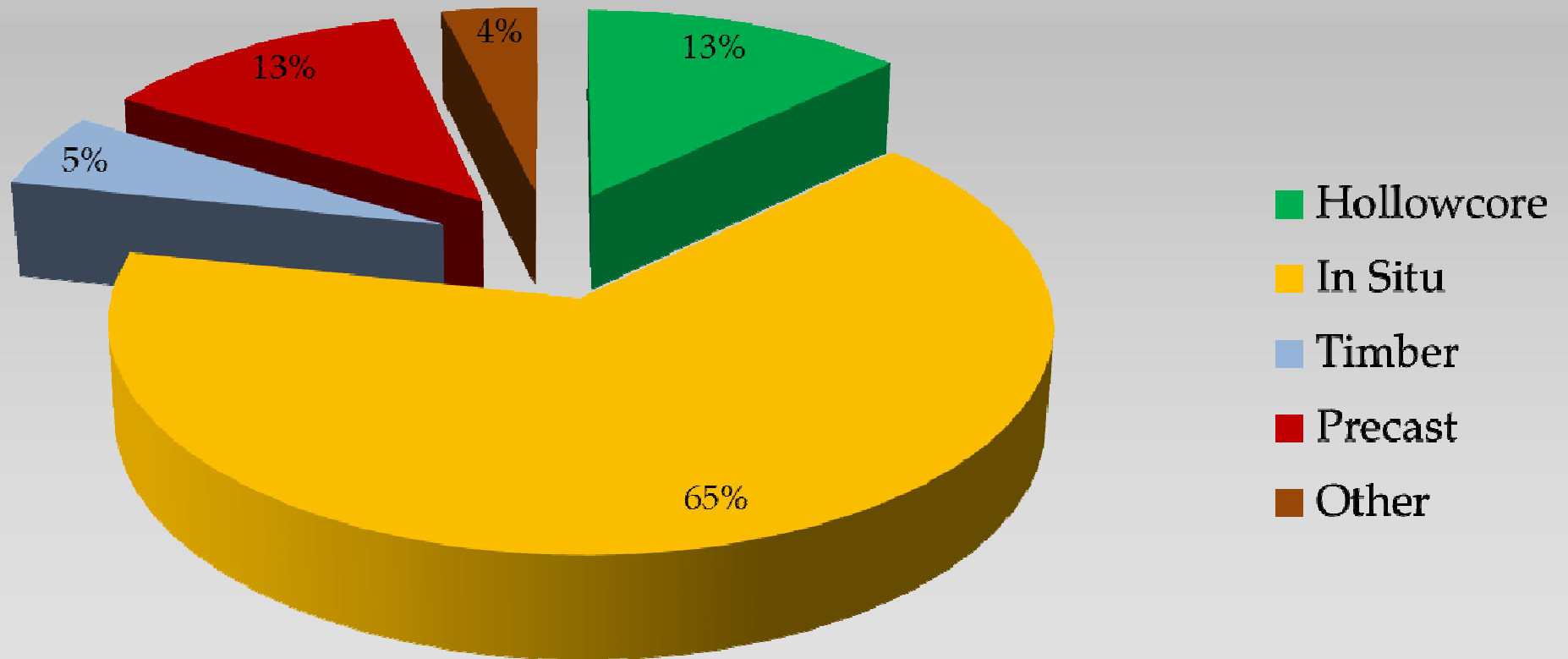
# UK - Ground floor



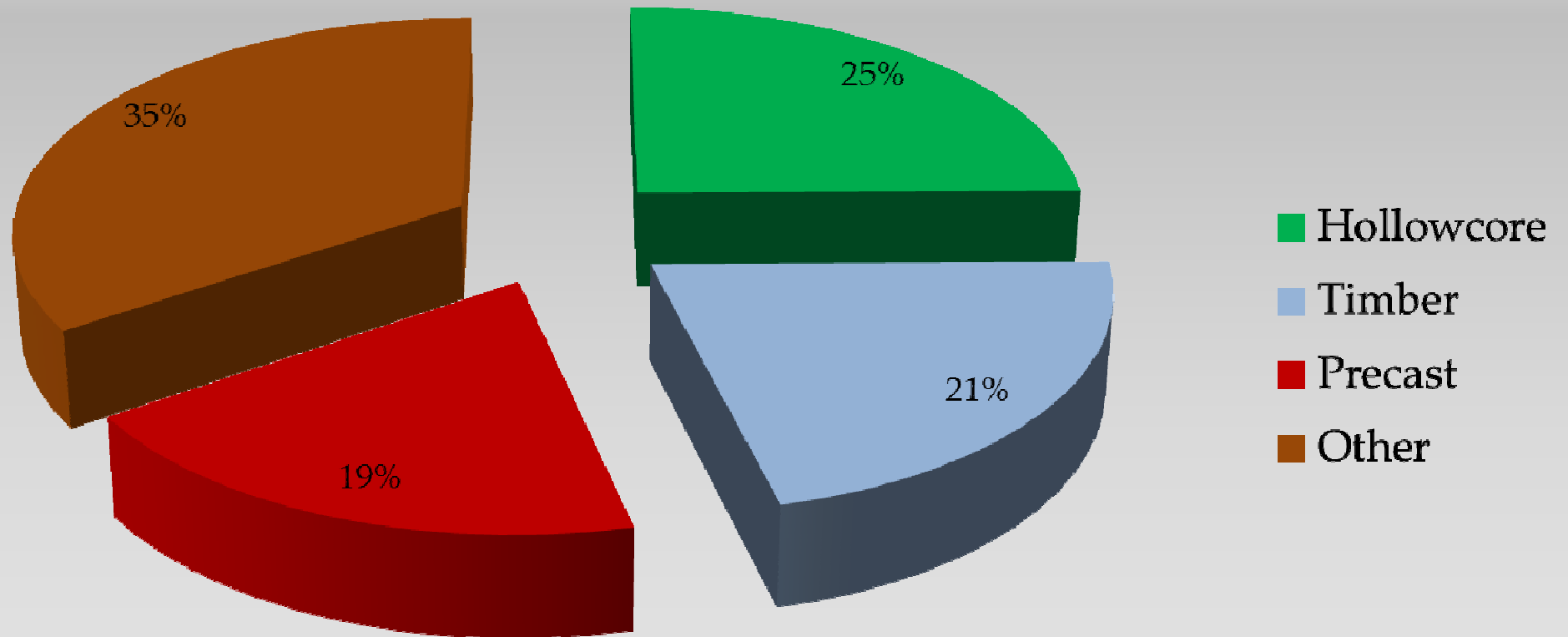
# UK - Upper floor



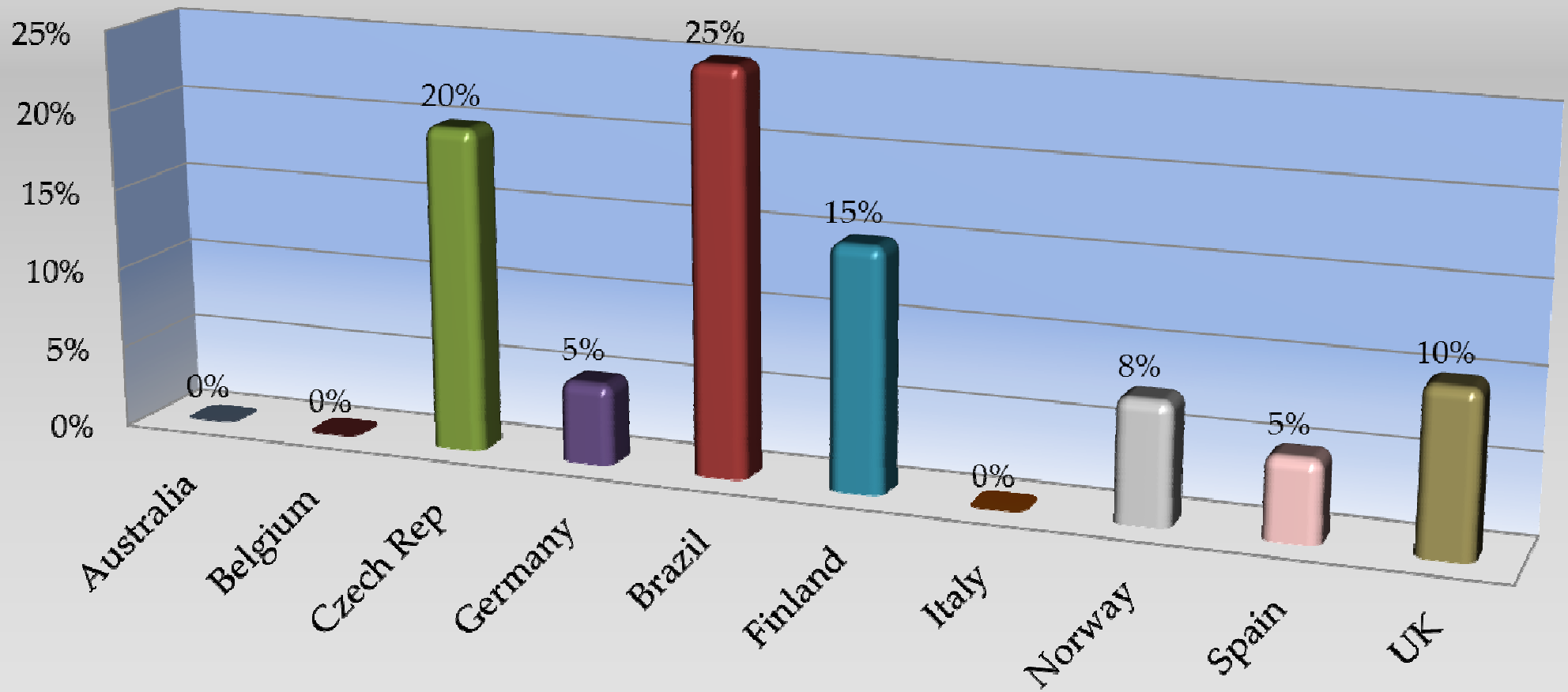
# All products - Ground floor - Global



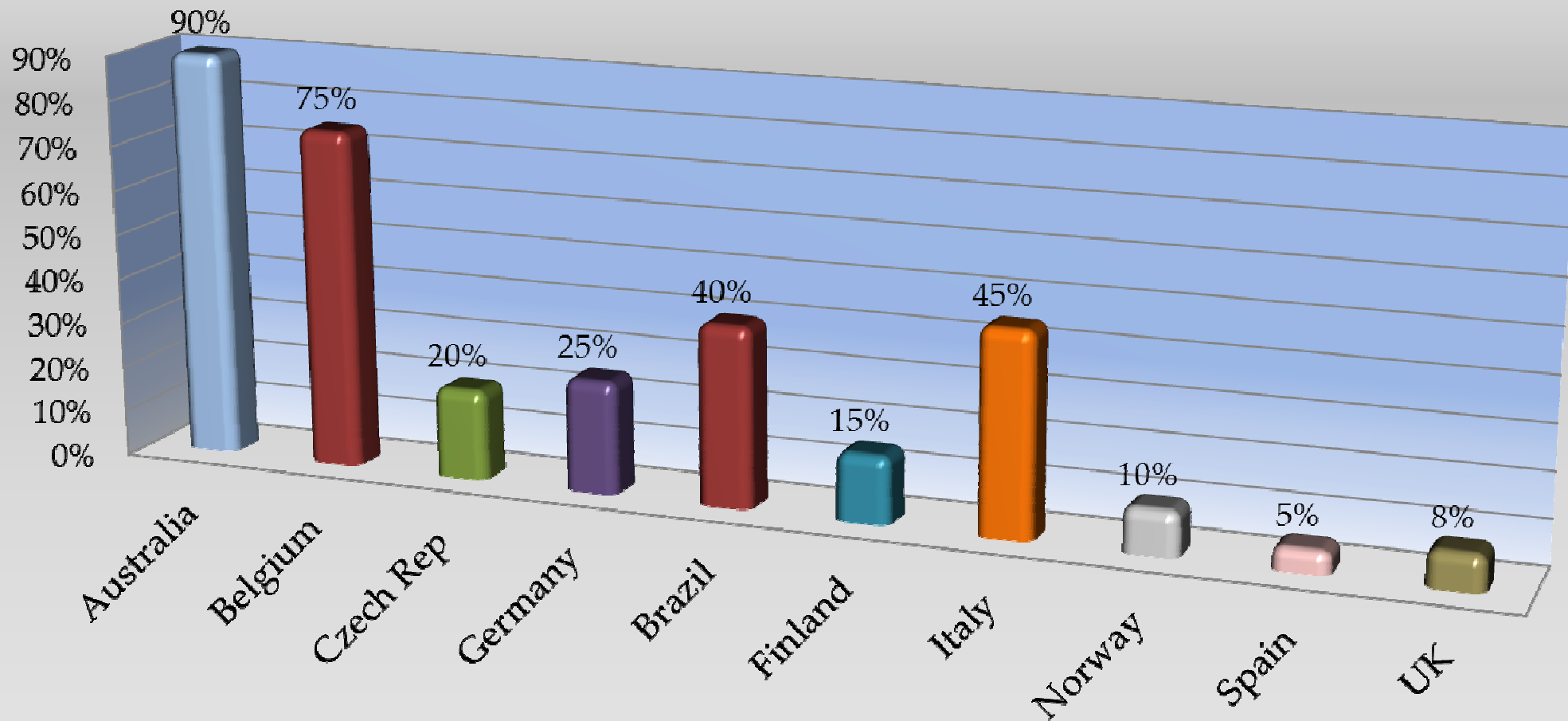
# All products - Upper floor - Global



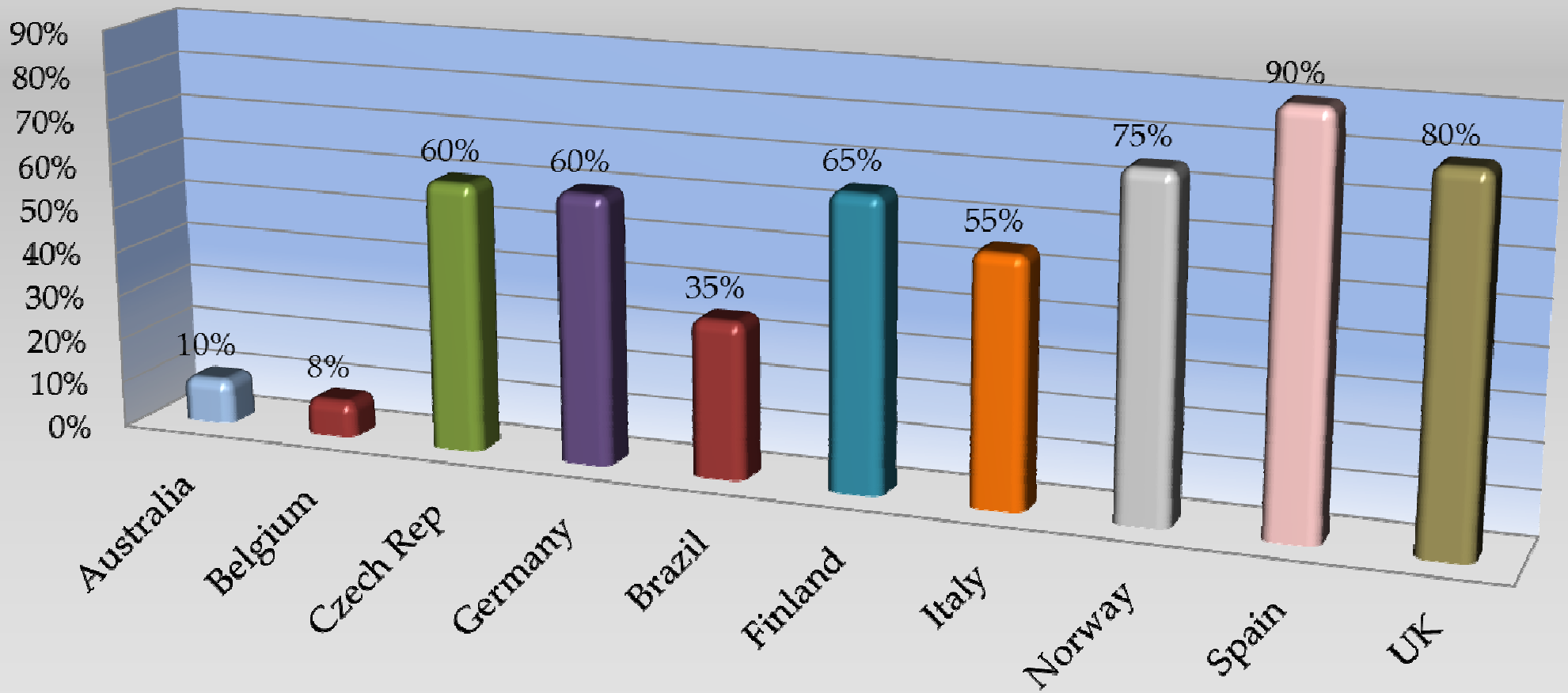
# Time spent calling on Merchants



# Time spent calling on Specifiers

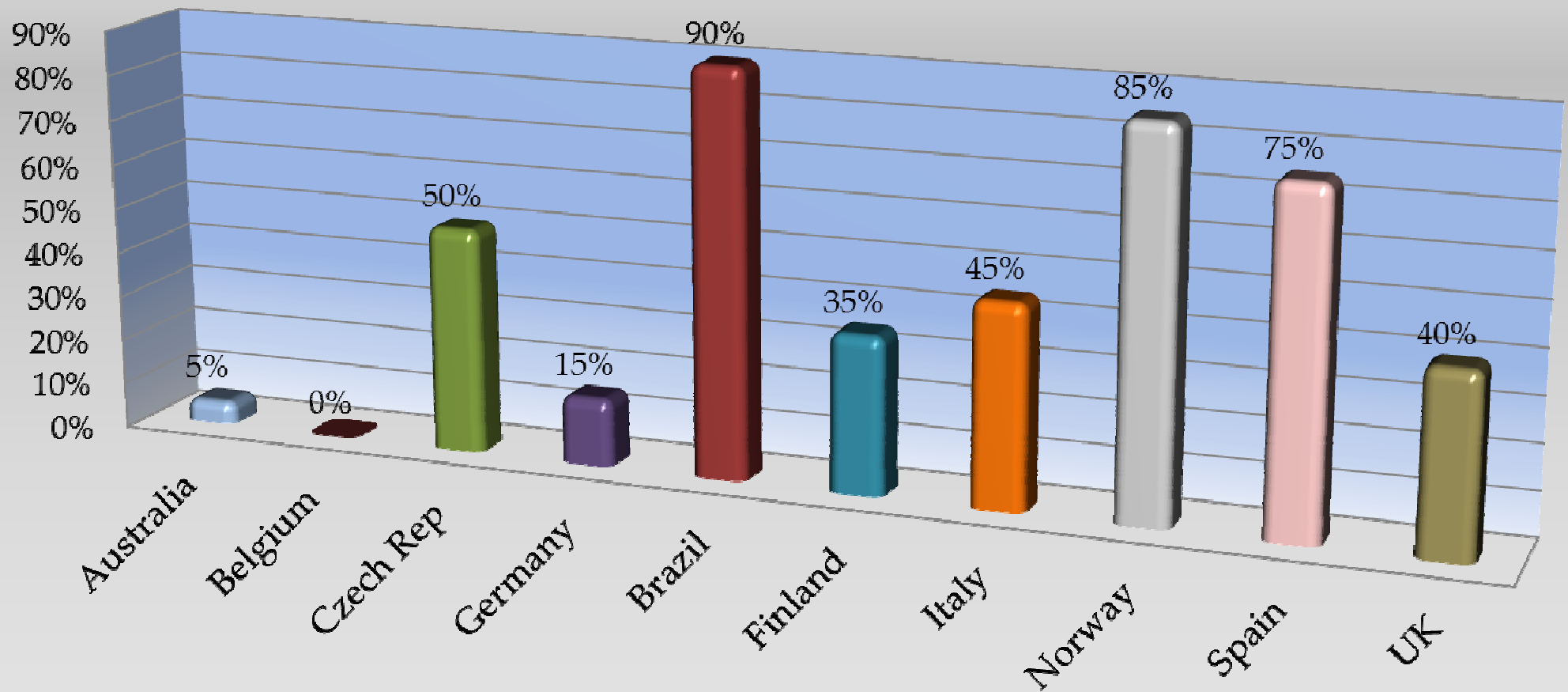


# Time spent calling on Contractors





# Products installed - Supply and Fix



## Market conditions – 2014 >

| Country          | Stay the same | Increase | Decrease |
|------------------|---------------|----------|----------|
| Australia        |               |          |          |
| Belgium          |               |          |          |
| Brazil           |               |          |          |
| Finland          |               |          |          |
| Italy            |               |          |          |
| Northern Ireland |               |          |          |
| Norway           |               |          |          |
| Spain            |               |          |          |
| UK               |               |          |          |
|                  |               |          |          |

# Some important statistics!

**Hollowcore accounts for 25% of the overall upper floor market.**

**Hollowcore accounts for 13% of the overall ground floor market.**

In situ is still the popular  
choice!

65%

WHY ?

# What gives us the edge?

What do you believe your respective Companies USP is in regards to Hollowcore products?

Eg: UK – Treanor-Pujol Ltd

- Cast in lifting hooks
- Technical capability and product
- Ability to react to client expectations on lead times

Please provide minimum of 2 examples of your USP that you would share with the other member countries:

# What do we think the future holds for Hollowcore?

Eg: UK – Treanor-Pujol Ltd

- BIM – Building Information Modelling

“The Government Construction Strategy was published by the Cabinet office on 31 May 2011. The report announced the Governments intention to require: collaborative 3D BIM (with all project and asset information, documentation and data being electronic) on its projects by 2016”

# Summary and Conclusions

- Market conditions will remain very tough in all countries with marginal growth expected in to 2014/15
- Hollowcore growth is being held back by the In-situ preference of clients, engineers and main contractors in a price sensitive market.
- Advancement in technology in particular IT and Design environment could give us a competitive edge to showcase our product capabilities over other forms of flooring.
- IPHA must play a vital role in benchmarking current manufacturing technologies and the sharing of ideas to all member countries without compromising individual Company USP.
- Common good of the Industry has to prevail.