

Consultancy project:

# Market Potential Analysis

By Jakub Čech & Andrej Šišolák

# Our Agenda

Consultancy Project | Market Analysis

- 5 min — 01 Definition & Objectives
- 20 min — 02 Vertical – Top Down
- 20 min — 03 Vertical – Bottom Up
- 20 min — 04 Horizontal

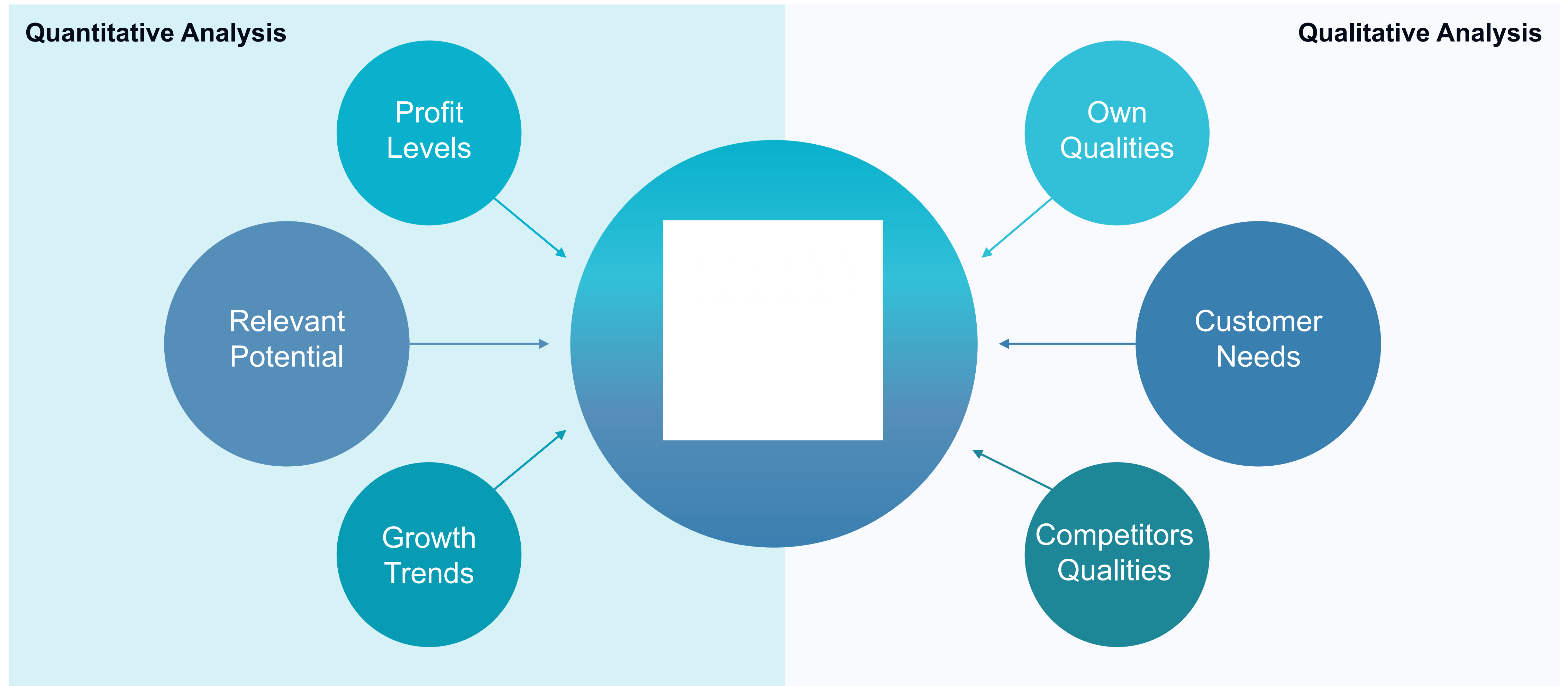
Market Potential Analysis

# Definition & Objectives

By Jakub Čech & Andrej Šišolák

# Market Analysis Objectives

Consultancy Project | Market Potential Analysis | Definition & Objectives





# Terms Definition

Consultancy Project | Market Potential Analysis

## Market

is the place or environment where customers can fulfill their needs



## Need

Target customer' needs, which should be fulfilled trough the business strategy



## Location

Target geographic location in which the business strategy will solve the fulfillment of selected customer needs



# Terms Definition

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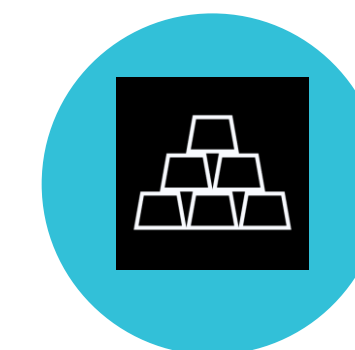
## Market Potential

Is a figure expressed in currency or measurable units that represents the total amount of goods or services that all the customers present in the defined market can buy within a specified time



### Value

The financial value of all the goods and services that all the customers can buy on the defined market



### Volume

The total amount of all the goods and services that all the customers can buy on the defined market



# Terms Definition

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## Market Segmentation

Refers to aggregating prospective buyers into groups with common needs and characteristics.



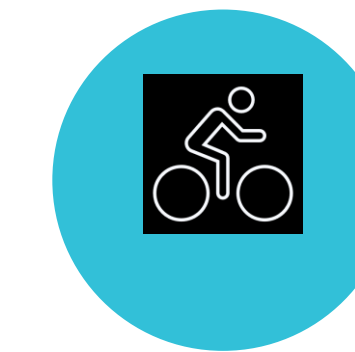
### Homogeneity

Common needs and characteristics of customers within the segment. (Demographic, Geographic, Lifestyle etc. for B2C, Type of business, number of employees for B2B)



### Distinction

Customer needs and behavior should be unique as much as possible in between the segment

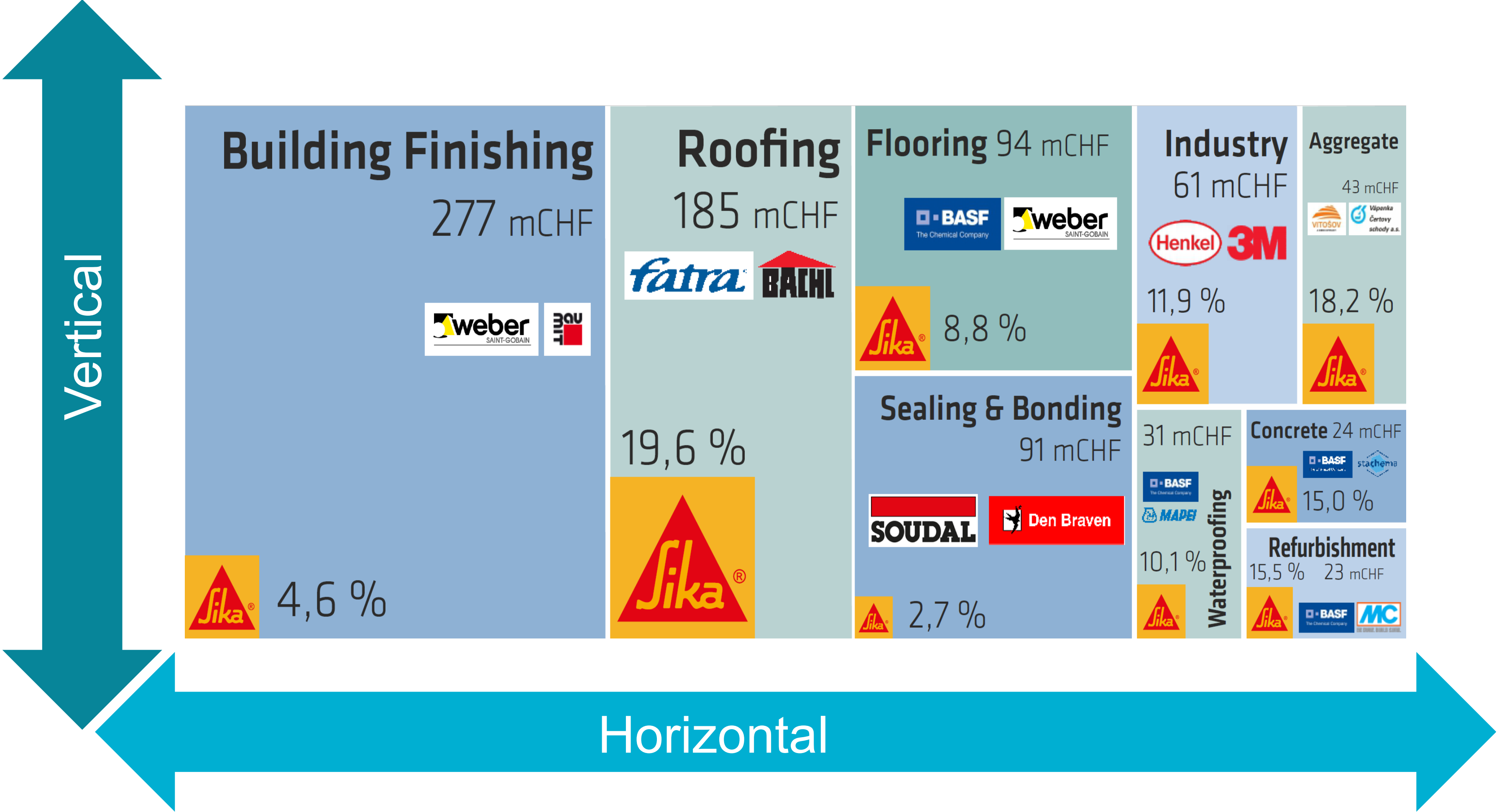


### Reaction

Similar response to the market development or marketing incentive

# Market Potential Calculation Methodologies

Consultancy Project | Market Potential Analysis | Definition & Objectives





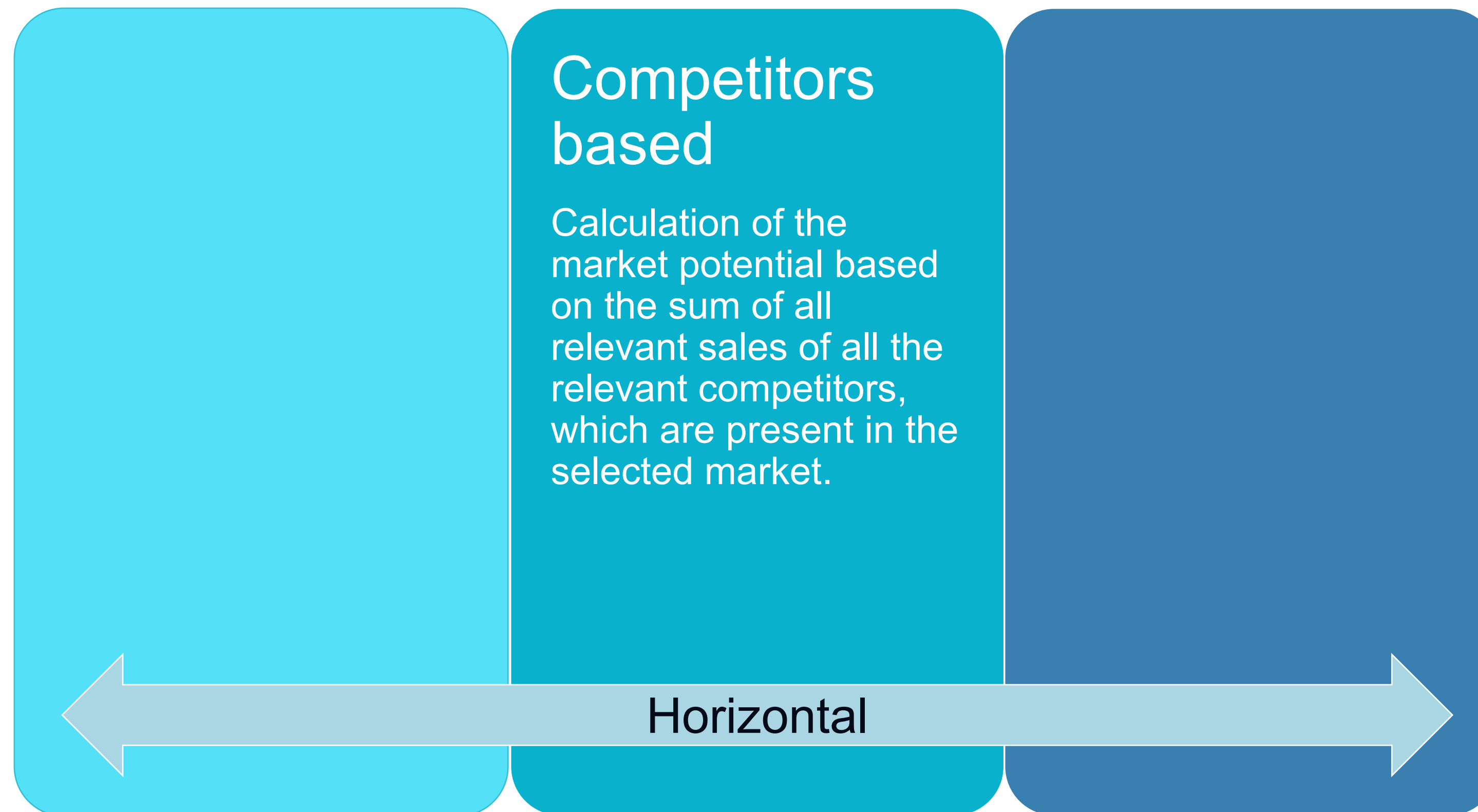
# Market Potential Vertical Methodologies

Consultancy Project | Market Potential Analysis | Definition & Objectives



# Market Potential Horizontal Methodology

Consultancy Project | Market Potential Analysis | Definition & Objectives



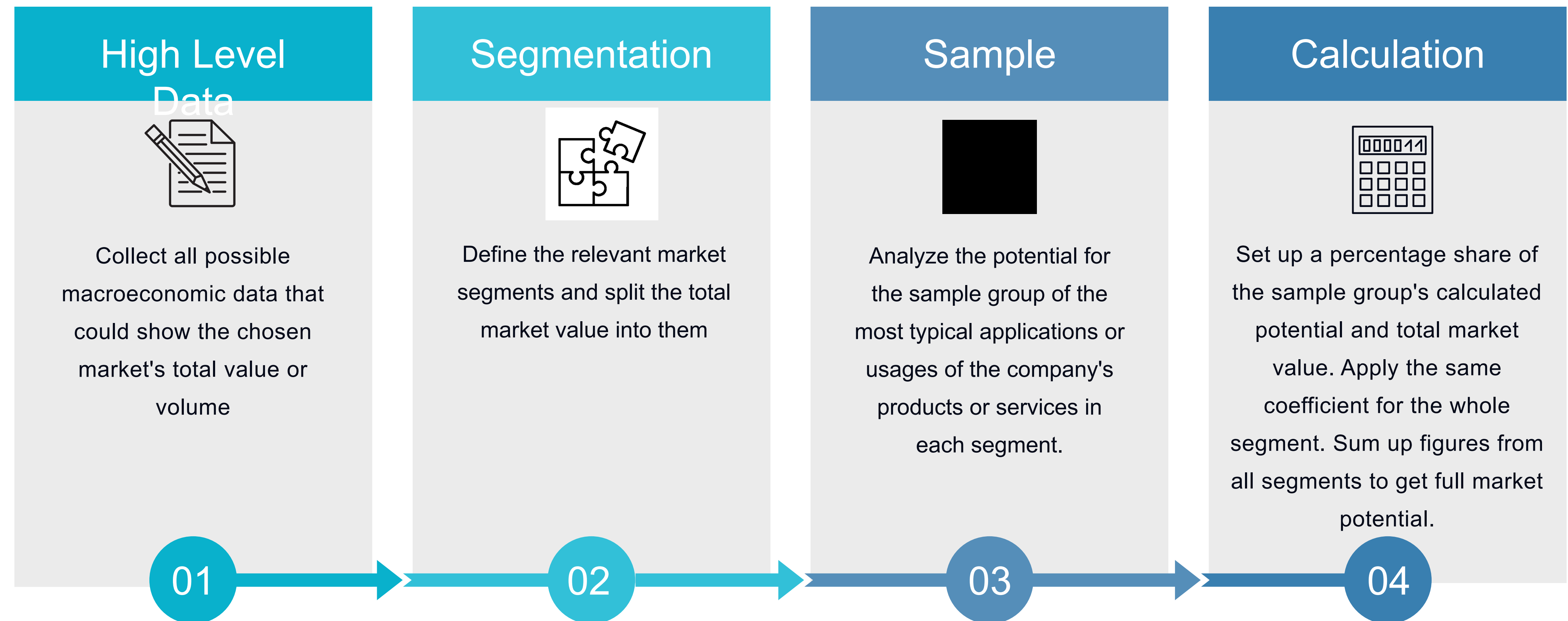
Market Potential Analysis

# Vertical – Top Down

By Jakub Čech & Andrej Šišolák

# Top-Down Calculation Process

Consultancy Project | [Market Potential Analysis](#) | Vertical – Top Down



# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Vertical – Top Down

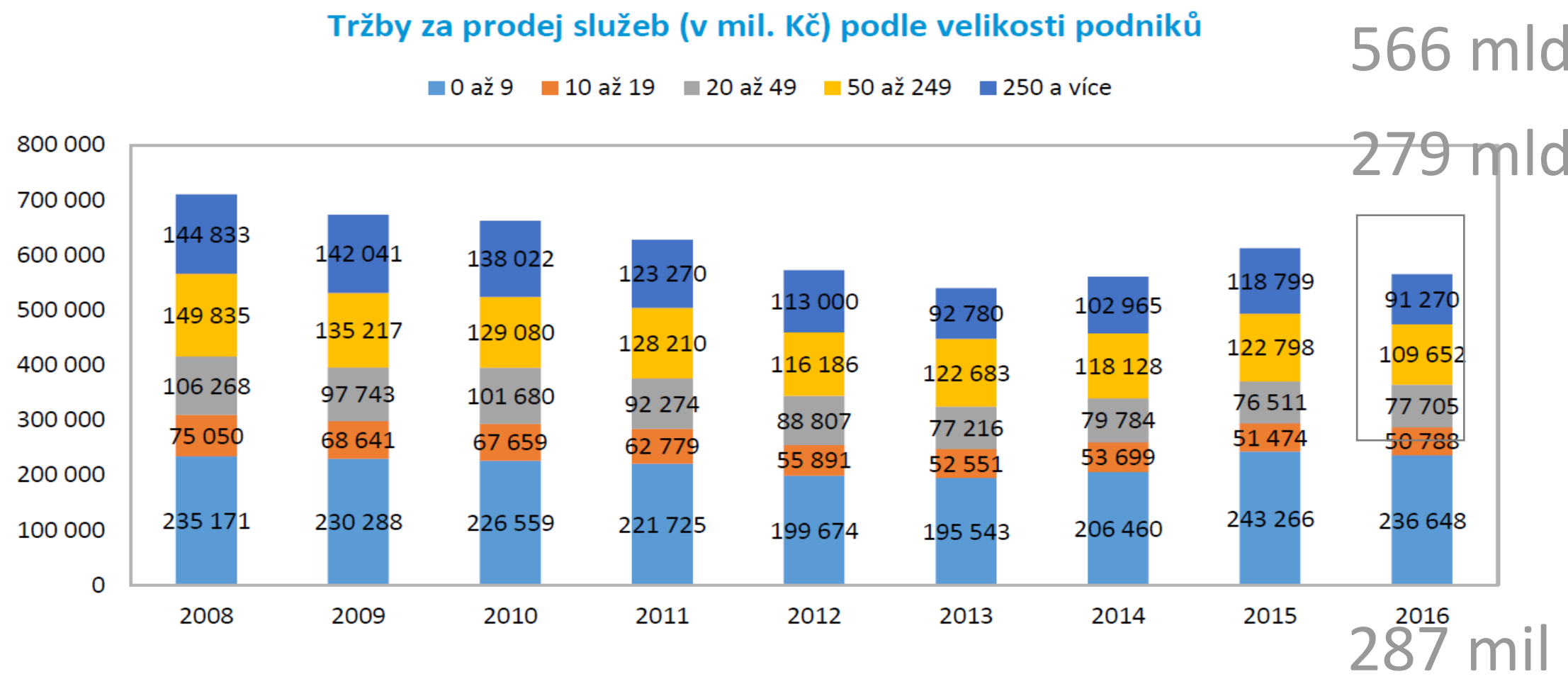
## CZ Macroeconomic Environment:

Key Macroeconomic Indicators	2015	2016	2017	2018	2019	2020	2021
GDP (nominal) (bn. CHF)	194	202	215	227	242	236	247
Population (mn)	10,538	10,554	10,579	10,610	10,650	10,694	10,702
GDP per capita (TCHF)	17,829	18,575	20,636	23,415	23,494	22,912	23,980
GDP (real) growth (%)	5,4	2,5	5,2	3,2	2,3	-6,1	3,3
Unemployment rate (%)	5,1	4,0	2,9	2,2	2,0	2,6	3,5
Inflation rate	0,3	0,7	2,5	2,1	2,8	3,2	3,8
CZK CHF (pavg)	24,9	25,1	21,9	22,9	23,3	24,3	23,7
CZK EUR (pavg)	27,3	27,0	26,3	25,6	25,7	26,4	25,1

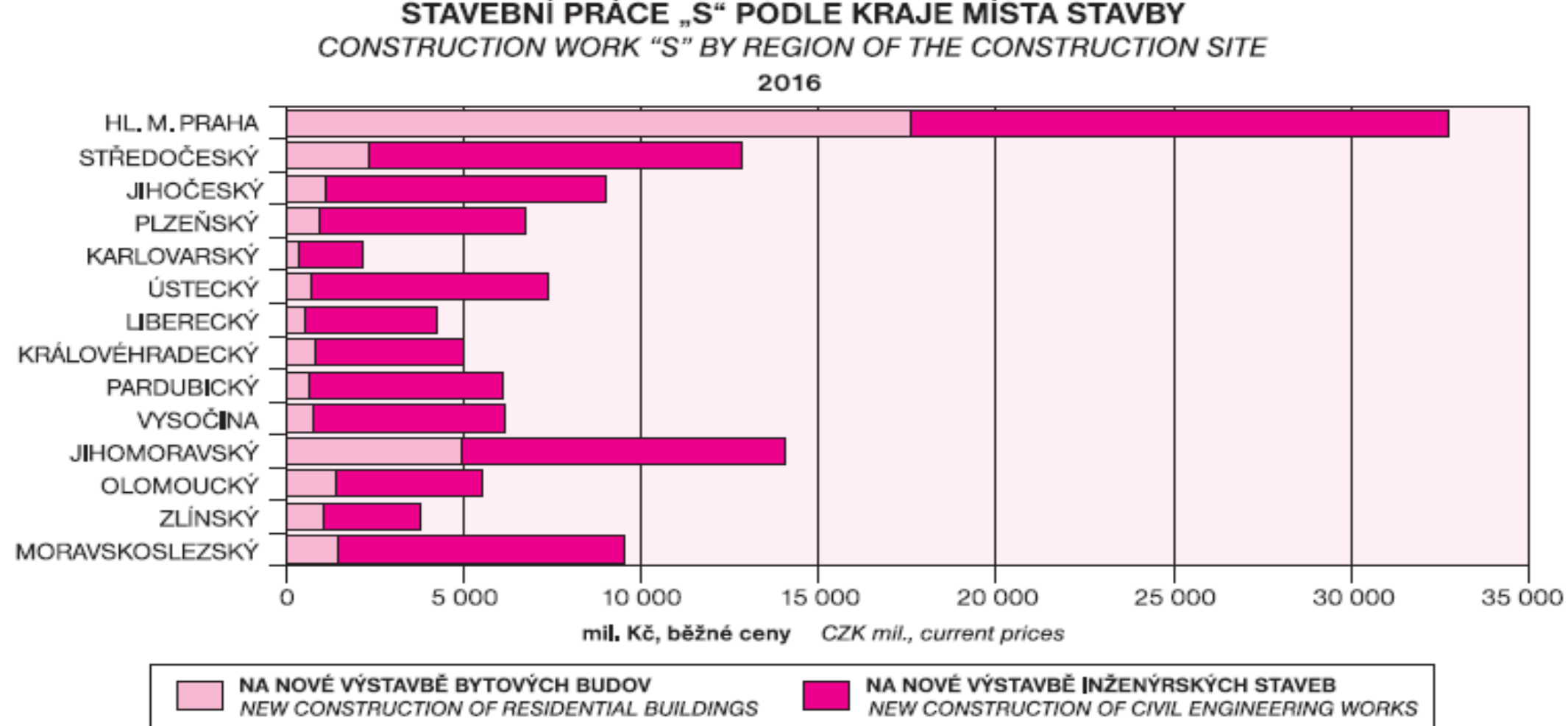
## CZ Construction Activity By Project Segments:

Year	Construction work "S" total	in it								Abroad
		in the CR	New construction, reconstruction and upgrade	Residential buildings	Non-residential buildings not designed for production	Non-residential buildings designed for production	Civil engineering works	Water management works	Repairs and maintenance	
2014	428 276	417 013	302 575	46 344	59 811	60 615	130 563	5 242	114 438	11 263
2015	459 051	446 104	326 340	51 603	56 185	62 155	151 693	4 704	119 764	12 947
2016	424 609	410 719	292 297	57 574	42 645	71 171	117 927	2 980	118 422	13 890
2017 p)	453 431	437 542	313 900	59 966	48 379	87 817	114 768	2 970	123 642	15 889

## CZ Construction Activity By Company Size:



## CZ Construction Activity By Region:

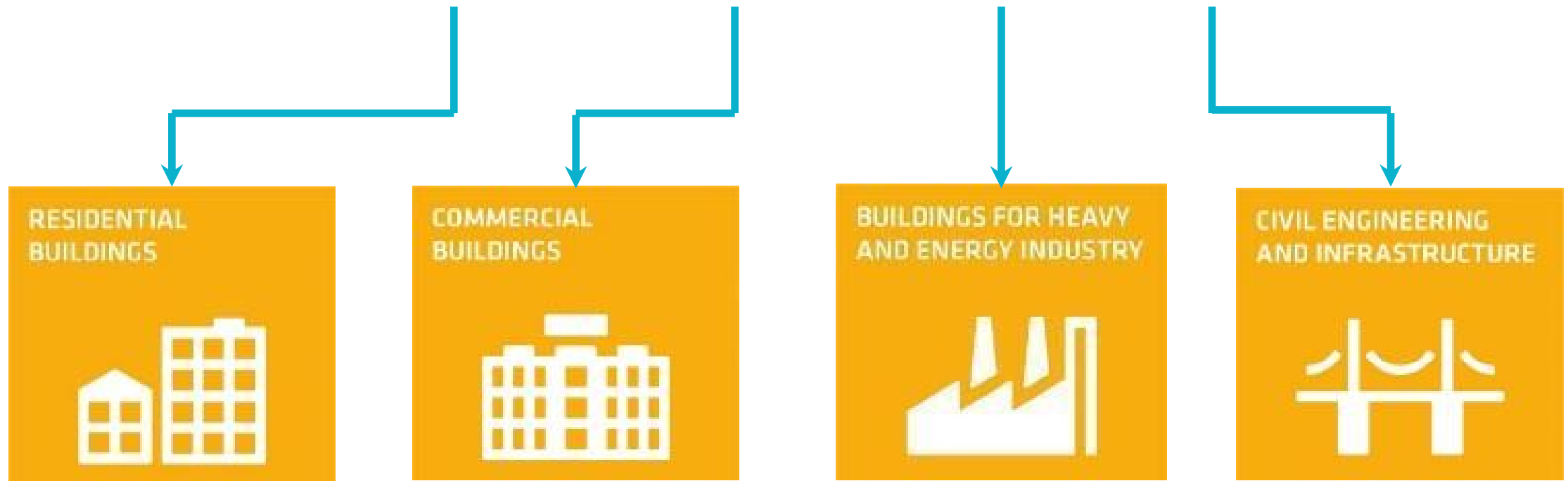


# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Vertical - Top Down

## CZ Construction Activity By Project Segments:

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CATEGORY	Name
1	CIVIL ENGINEERING AND INFRASTRUCTURE
2	BUILDINGS FOR HEAVY AND ENERGY INDUSTRY
3	LOGISTIC AND LIGHT INDUSTRY PARKS
4	FOOD, PHARMA AND AGRICULTURE
5	COMMERCIAL BUILDINGS
6	RESIDENTAL BUILDINGS
7	PUBLIC BUILDINGS

# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Vertical – Top Down

## Bill of materials:

### Example No. 3

Budget of real project that Sika CZ participated in - these values show the value of Sika's actual stake in the project, including the values from the URS database.

Project BRIDGE: budget 211 000 000 CZK = 9 286 972 CHF

Construction components and craft industries	URS share (%)	URS share (CHF)	Calculation
Building foundation	14,6%	1 355 898	<p>CONCRETE: 7702 m<sup>3</sup> → type of concrete C25/30 XA 1; C30/37 XF2 ; C30/37 XC4, XD2, XF3 → the proportion of admixture in concrete, potential per 1m<sup>3</sup> = 3,37 kg of admixture = 26 000 kg = <b>33 897 CHF (2,5% Sika potential)</b></p> <p>FLOORING: 5,2 m<sup>3</sup> drainage concrete → the proportion of Sikafloor 156 = 220 kg per 1m<sup>3</sup> = 1144 kg = <b>12 203 CHF (0,9% Sika potential)</b></p>
Surface finishes, floors, installation	19,2%	1 783 099	<p>REFURBISHMENT: 11 400 m<sup>2</sup>; <b>189 009 CHF (10,6% Sika potential)</b></p> <p>1) reprofiling 0-20 mm → the proportion of SikaRep CZ; 1,9kg/1mm/1m<sup>2</sup> = 19kg → 216 600 kg = 128 740 CHF</p> <p>2) Bonding bridge → the proportion of SikaMonotop 910N; 2 kg/1mm/1m<sup>2</sup> = 2 kg → 22800 kg = 20 149 CHF</p> <p>3) final layer → the proportion of SikaMonotop 620; 1,7kg/1mm/1m<sup>2</sup> = 35 765 kg = 40 120 CHF</p>
Insulation against water and moisture	2,0%	185 739	<p>Waterproofing: <b>102 157 CHF (55,0% Sika potential)</b></p> <p>a) 7536 m<sup>2</sup>: primer for concrete bridges → the proportion of Sika Ergodur 500Pro; 0,5 kg/1m<sup>2</sup> = 3768 kg = 46 435 CHF</p> <p>b) 11 943 m<sup>2</sup> protection coating → Sika Igasol 101; 2kg/1m<sup>2</sup> = 23 886 kg = 55 722 CHF</p>

# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Vertical – Top Down

## Bill of materials:

### Example No. 2

Budget of real project that Sika CZ participated in - these values show the value of Sika's actual stake in the project, including the values from the URS database.

Example of detail calculation (grey lines) is shown on the next slide.

**Project BRIDGE: budget 211 000 000 CZK = 9 286 972 CHF**

Construction components and craft industries	URS share (%)	URS share (CHF)	CONCRETE	WATER PROOFING	FLOORING	REFURBISHMENT	SEALING & BONDING	SIKA potential (CHF)	SIKA potential (%)	
Earthworks	3,1	283 252,6								
Building foundation	14,6	1 355 897,9	2,5%	33 897,4	0,9%	12 203,1		46 100,5	3,4%	
Vertical and complete construction	9,9	914 766,7	4,1%	37 505,4				37 505,4	4,1%	
Horizontal construction	20,1	1 866 681,3	1,1%	20 533,5				20 533,5	1,1%	
Ground communication	3,1	283 252,6							0,0%	
Surface finishes, floors, installation	19,2	1 783 098,6				10,6%	189 008,5	189 008,5	10,6%	
Pipelines	0,3	23 217,4							0,0%	
Other constructions and work	15,2	1 411 619,7			0,1%	1 411,6	0,7%	9 881,3	11 293,0	
Mass transfer	5,4	501 496,5							0,0%	
<b>TOTAL main building production</b>	<b>90,7</b>	<b>8 423 283,5</b>		<b>91 936,4</b>		<b>13 614,7</b>	<b>189 008,5</b>	<b>9 881,3</b>	<b>304 440,9</b>	<b>3,6%</b>
Insulation against water and moisture	2,0	185 739,4		55,0%	102 156,7			102 156,7	55,0%	
Plumbing structures	0,3	27 860,9							0,0%	
Additional metal construction	0,2	18 573,9							0,0%	
Finishing works - coatings	5,0	464 348,6			11,0%	51 078,3	11,4%	52 935,7	104 014,1	
<b>TOTAL additional building production</b>	<b>7,5</b>	<b>696 522,9</b>			<b>102 156,7</b>	<b>51 078,3</b>	<b>52 935,7</b>	<b>206 170,8</b>	<b>29,6%</b>	
Heavy current	0,2	18 573,9								
Earthworks for "M"	0,1	9 287,0								
Other work according to the price list "M"	1,5	139 304,6								
<b>"M" Total</b>	<b>1,8</b>	<b>167 165,5</b>								
<b>TOTAL</b>	<b>100</b>	<b>9 286 971,8</b>		<b>91 936,4</b>		<b>64 693,0</b>	<b>241 944,2</b>	<b>9 881,3</b>	<b>510 611,6</b>	<b>5,5%</b>
<b>Potential</b>			<b>1,0%</b>	<b>1,1%</b>	<b>0,7%</b>	<b>2,6%</b>	<b>0,1%</b>			



# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Vertical – Top Down

## Sika potential in % of total investment:

**Result**

1) Definition of Sika’s total potential in each of the 7 construction types and TM in percentage from total investments.

CATEGORY	TARGET MARKET							ALL TM
	CONCRETE	WATER PROOFING	FLOORING	ROOFING	REFURBISHMENT	SEALING & BONDING	INDUSTRY	
CIVIL ENGINEERING AND INFRASTRUCTURE	1,00%	1,10%	0,70%	0,00%	2,60%	0,10%	0,00%	<b>5,50%</b>
BUILDINGS FOR HEAVY AND ENERGY INDUSTRY	0,60%	1,20%	0,60%	0,45%	1,83%	0,05%	0,00%	<b>4,73%</b>
LOGISTIC AND LIGHT INDUSTRY PARKS	0,26%	0,61%	0,53%	2,19%	0,29%	0,31%	0,24%	<b>4,43%</b>
FOOD, PHARMA AND AGRICULTURE	0,27%	0,69%	1,53%	1,02%	0,06%	0,15%	0,00%	<b>3,72%</b>
COMMERCIAL BUILDINGS	0,51%	0,72%	2,81%	1,14%	0,74%	0,16%	0,05%	<b>6,12%</b>
RESIDENTAL BUILDINGS	0,48%	0,34%	0,50%	0,65%	0,47%	0,32%	0,00%	<b>2,76%</b>
PUBLIC BUILDINGS	0,55%	0,33%	0,30%	0,33%	0,26%	0,18%	0,08%	<b>2,03%</b>
Average	0,52%	0,71%	1,22%	0,86%	0,87%	0,18%	0,05%	<b>4,43%</b>

# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Vertical – Top Down

## Sika potential in different types of buildings:

### Result

2) Calculation of Sika potential across 7 construction types and TM.

CATEGORY	TOTAL TM (mil CHF)								
	Budget (mil CHF)	CONCRETE	WATER PROOFING	FLOORING	ROOFING	REFURBISHMENT	SEALING & BONDING	INDUSTRY	ALL TM
CIVIL ENGINEERING AND INFRASTRUCTURE	1 239,3	12,4	13,6	8,7	0,0	32,2	1,2	0,0	<b>68,2</b>
BUILDINGS FOR HEAVY AND ENERGY INDUSTRY	414,4	2,5	5,0	2,5	1,9	7,6	0,2	0,0	<b>19,6</b>
LOGISTIC AND LIGHT INDUSTRY PARKS	906,6	2,4	5,5	4,8	19,9	2,6	2,8	2,2	<b>40,2</b>
FOOD, PHARMA AND AGRICULTURE	135,8	0,4	0,9	2,1	1,4	0,1	0,2	0,0	<b>5,0</b>
COMMERCIAL BUILDINGS	833,1	2,5	4,2	8,9	10,0	6,1	2,1	0,1	<b>33,9</b>
RESIDENTIAL BUILDINGS	655,3	3,1	2,2	3,3	4,3	3,1	2,1	0,0	<b>18,1</b>
PUBLIC BUILDINGS	712,1	3,9	2,3	2,1	2,3	1,9	1,3	0,6	<b>14,5</b>
<b>Total</b>	<b>4 896,5</b>	<b>27,2</b>	<b>33,9</b>	<b>32,3</b>	<b>39,7</b>	<b>53,5</b>	<b>9,9</b>	<b>2,9</b>	<b>199,4</b>

# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Vertical – Top Down

## Relevant Sika potential:

### DEFINITION

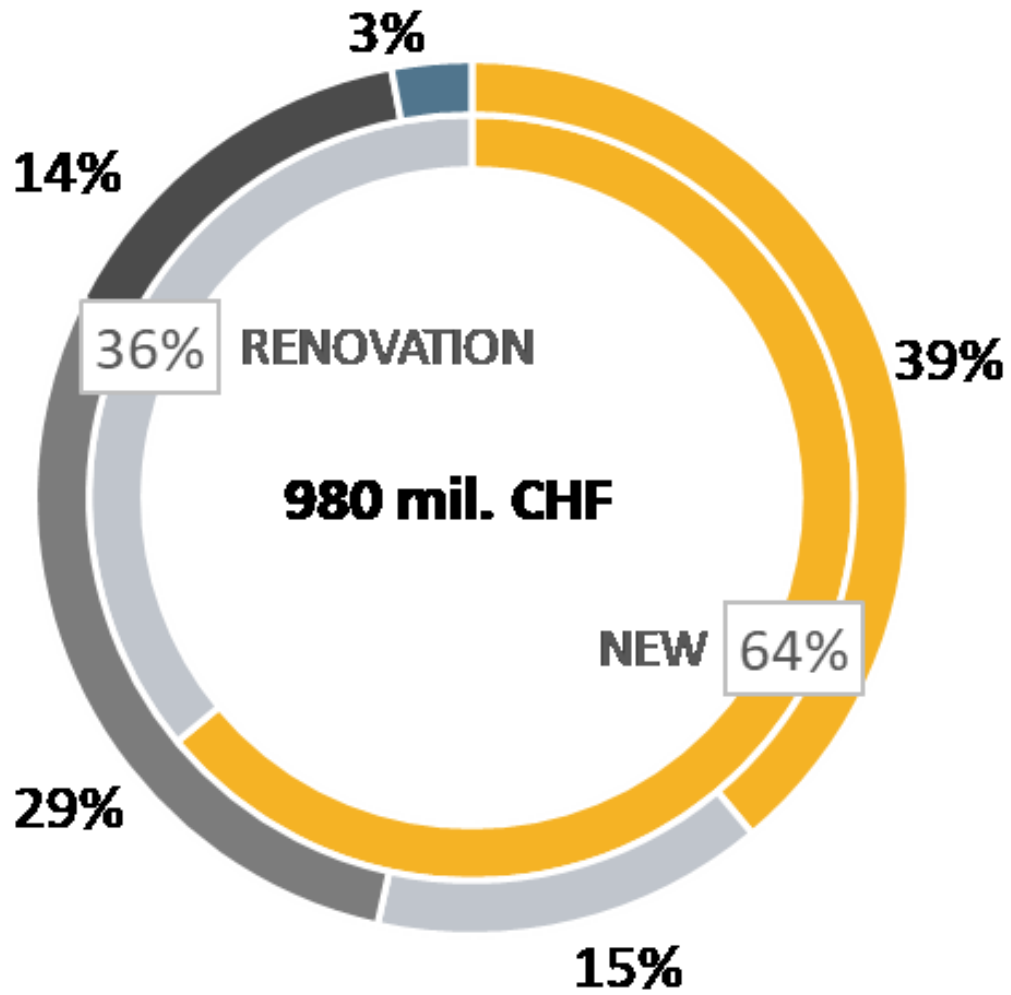


Investment mCHF	4 361	3 221	4 359	5 968
Sika potential %	8,76 %	4,43 %	6,54 %	2,39 %
Sika potential mCHF	382,0	142,7	285,1	142,6

### DESCRIPTION AND TRENDS

- Total construction spending is expected to continue on this positive course, increasing 10.2 % in 2018 and 2.8 % in 2019.
- Construction spending in the Czech Republic will face a 2.9% compound annual growth rate (CAGR) between 2017 and 2022 with growth led by the infrastructure segment.
- In the longer run, growth will slow to a 2.2% compound annual rate between 2022 and 2027. The infrastructure segment will again demonstrate the highest growth over the period.
- Infrastructure projects are hardly predictable due to long approval process

### MARKET SIZE & STRUCTURE



- Residential
- Commercial
- Production
- Infrastructure
- Others

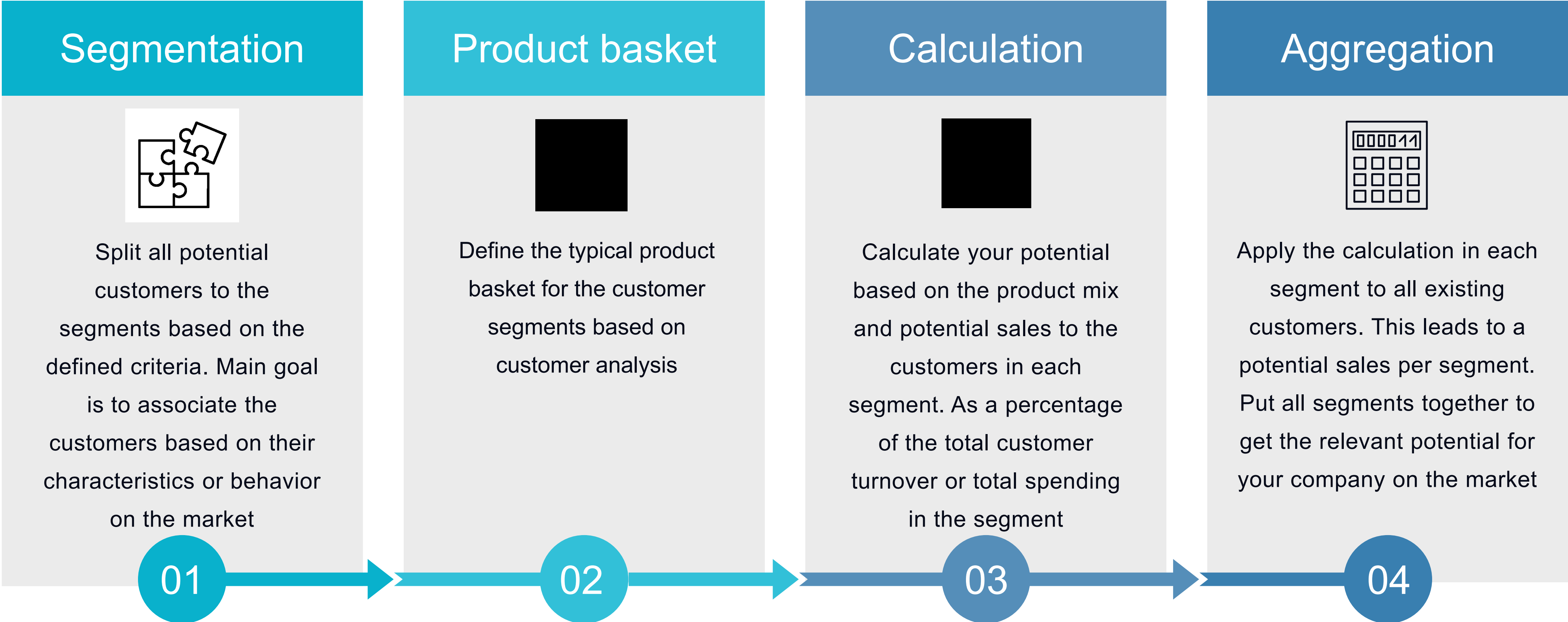
Market Potential Analysis

# Vertical – Bottom Up

By Jakub Čech & Andrej Šišolák

# Bottom Up Calculation Process

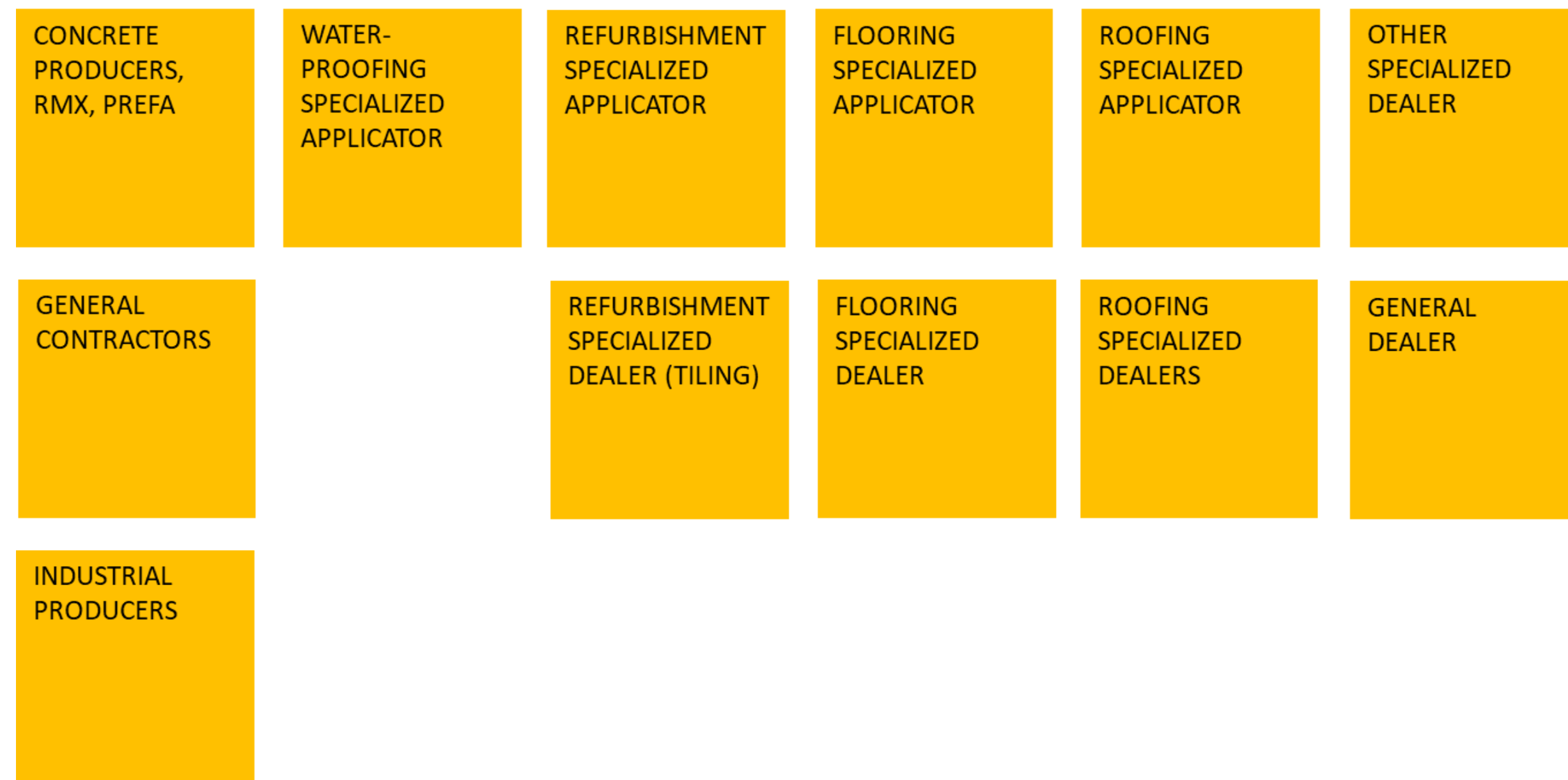
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# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Vertical – Bottom Up

Customer segmentation – segment definition:



# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Vertical – Bottom Up

## Customer segmentation:

Extracted of 717 active Sika CZ customers from SAP together with their turnover in 2017.

Input their total turnover from official P&L (source: [www.justice.cz](http://www.justice.cz)).

Define 12 customer groups. Then, based on company business and portfolio, assigned customer group.

Customer name	Sales kCHF	Turnover kCHF	Customer group
Stavebniny DEK, a.s.	3 365	439 035	General dealer
IZOFOL - sklady s.r.o.	1 590	6 856	ROOF Specialised dealer
LS Systém CZ, s.r.o.	1 124	4 559	ROOF Specialised dealer
TECHFLOOR s.r.o.	780	28 205	FLR Specialised aplicator
FIRESTA-Fišer rekonstrukce	678	93 996	General Contractors (general construction companies all sizes)
Iveco Czech Republic a.s.	666	758 335	IND Producers
G.A.M. HEAT spol. s r. o.	647	23 894	FLR Specialised aplicator
BETVAR a.s.	485	8 944	REF Specialised aplicator
ŠKODA TRANSPORTATION a.s.	436	684 583	IND Producers
Free Store s.r.o.	434	2 267	ROOF Specialised dealer
KOBERCE BRENO, spol. s r.o.	427	61 225	FLR Specialised dealer

# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Vertical – Bottom Up

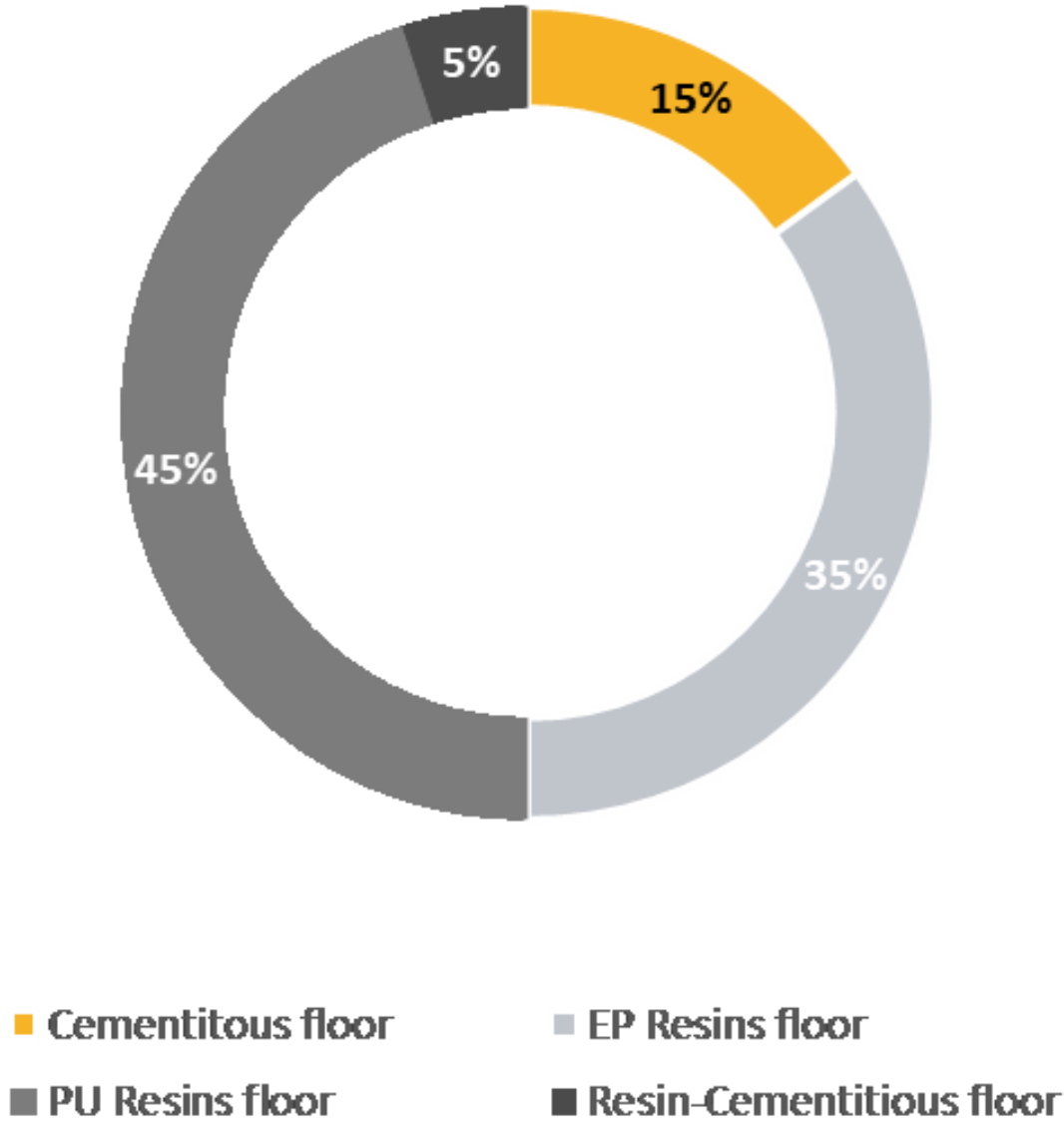
Product basket:

### Customer potential calculation

This calculation of potential per customer is based on our existing customers database. In total it includes 717 customers. For TM Flooring we have 108 specialized applicators 20 specialized dealers (from total 395 registered customers in 2017).

Customer name	Total company turnover (kCHF)	Sika sales (kCHF)	Sika potential (kCHF)	Potential %
Techfloor	35 213	764	3 323	9.5%
HT Floor	12 020	4	1 400	12%
BCC	8 149	65	1 100	13.5%
Vibrobeton	6 800	0	800	12%
Acidotechna	3 816	469	900	24%
AM Podlahy	1 852	87	150	8%
EFISAN	1 495	156	500	33%
AAP Hranice	1.400	29	300	21%
SALIT	1 262	92	300	24%
Zbyněk Šustr	1 109	205	400	36%
<b>Customer group potential</b>				<b>12.0%</b>

### Typical Product Basket





# Market Potential Sika CZ Case Study

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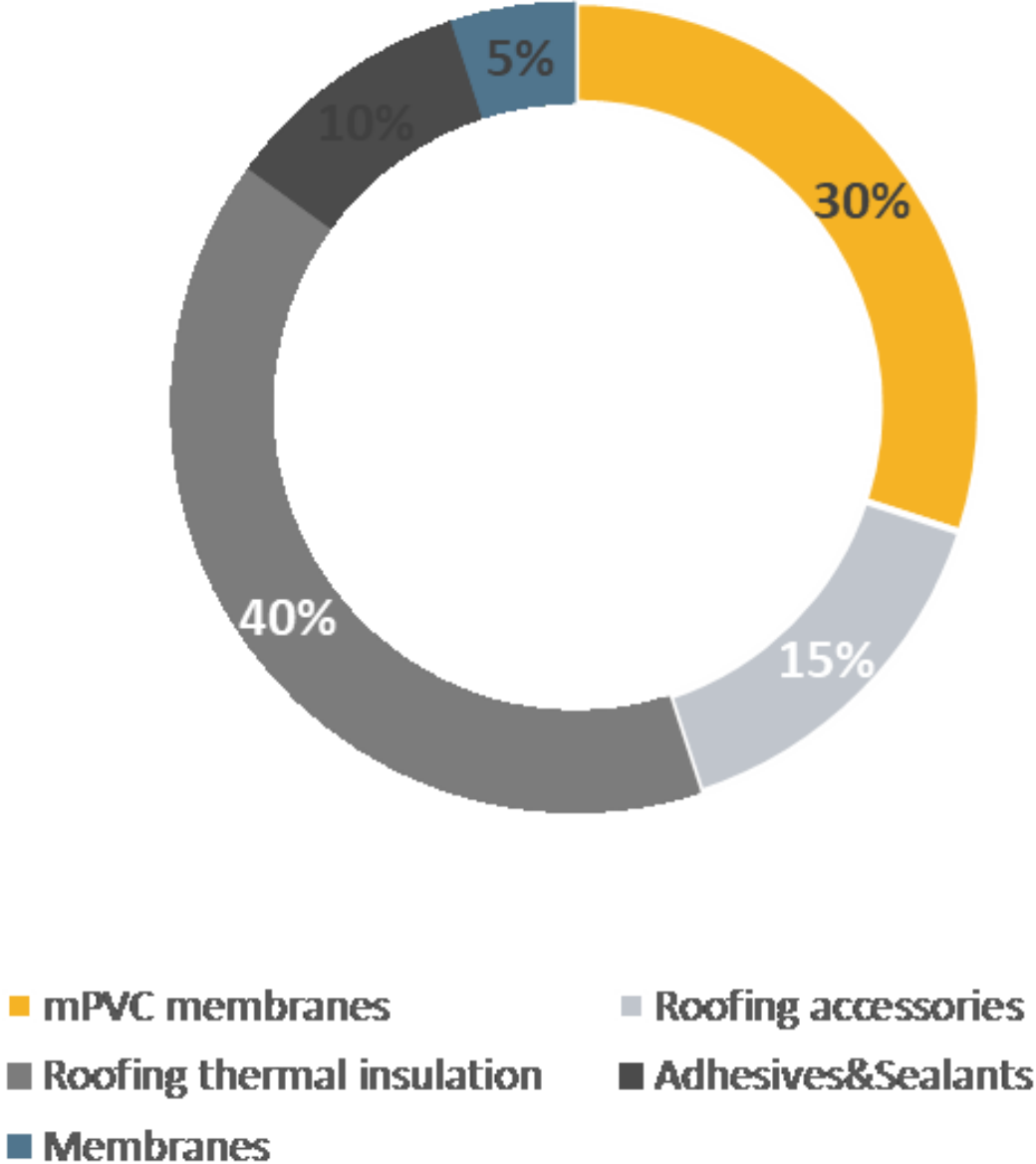
Product basket:

### Customer potential calculation

This calculation of potential per customer is based on our existing customers database. In total it includes 717 customers. For roofing specialized applicators we have 26 buying customers.

Customer name	Total company turnover (kCHF)	Sika sales (kCHF)	Sika potential (kCHF)	Potential %
Stavoizola	924	217	230	25%
P-Systems	3 353	174	670	20%
RESMONT	2 388	164	500	21%
IZOLACE HK	1 610	126	340	21%
Brnenske izolace	3 158	125	790	25%
Falk	9 371	62	1 870	20%
Stavizolex	1 506	62	285	19%
Benefol	1 101	59	175	16%
Vanicek	1 999	24	300	15%
SKYSCRAPER	2 910	23	520	18%
<b>Customer group potential</b>				<b>20.0%</b>

### Typical Product Basket



# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Vertical – Bottom Up

## Potential calculation:

We have selected top known customers for each customer groups.

Set sales potential, based on interview with customer and knowledge about his business.

We have calculated potential share for each top customer:  $\text{Sika potential} / \text{Total company turnover}$

Based on the information above, we have estimated potential share for the customer group

Customer name	Total company turnover (kCHF)	Sika sales (kCHF)	Sika potential (kCHF)	Potential %
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AAP Hranice	1 400	29	300	21%
SALIT	1 262	92	300	24%
Zbyněk Šustr	1 109	205	400	36%
<b>Customer group potential</b>				<b>10%</b>

# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Vertical – Bottom Up

Potential calculation:

Customer groups	Number of customers	Total Potential Sika kCHF	Total Sika Sales kCHF
CONCRETE PRODUCERS, RMX, PREFAB	63	75 327	4 813
WATERPROOFING SPECIALIZED APPLICATOR	5	2 573	283
REFURBISHMENT SPECIALIZED APPLICATOR	15	640 572	1 677
FLOORING SPECIALIZED APPLICATOR	101	129 462	4 032
ROOFING SPECIALIZED APPLICATOR	26	38 051	1 515
OTHER SPECIALIZED DEALER (any TM)	36	328 179	4 418
GENERAL CONTRACTORS (general construction companies all sizes)	220	453 989	3 517
FLOORING SPECIALIZED DEALER	40	29 745	1 634
REFURBISHMENT SPECIALIZED DEALER (tiling)	14	73 188	1 061
ROOFING SPECIALIZED DEALER	3	44 817	3 150
GENERAL DEALER	85	1 652 099	5 532
INDUSTRIAL PRODUCERS	109	94 243	4 252
<b>Total</b>	<b>717</b>	<b>3 562 245</b>	<b>35 884</b>

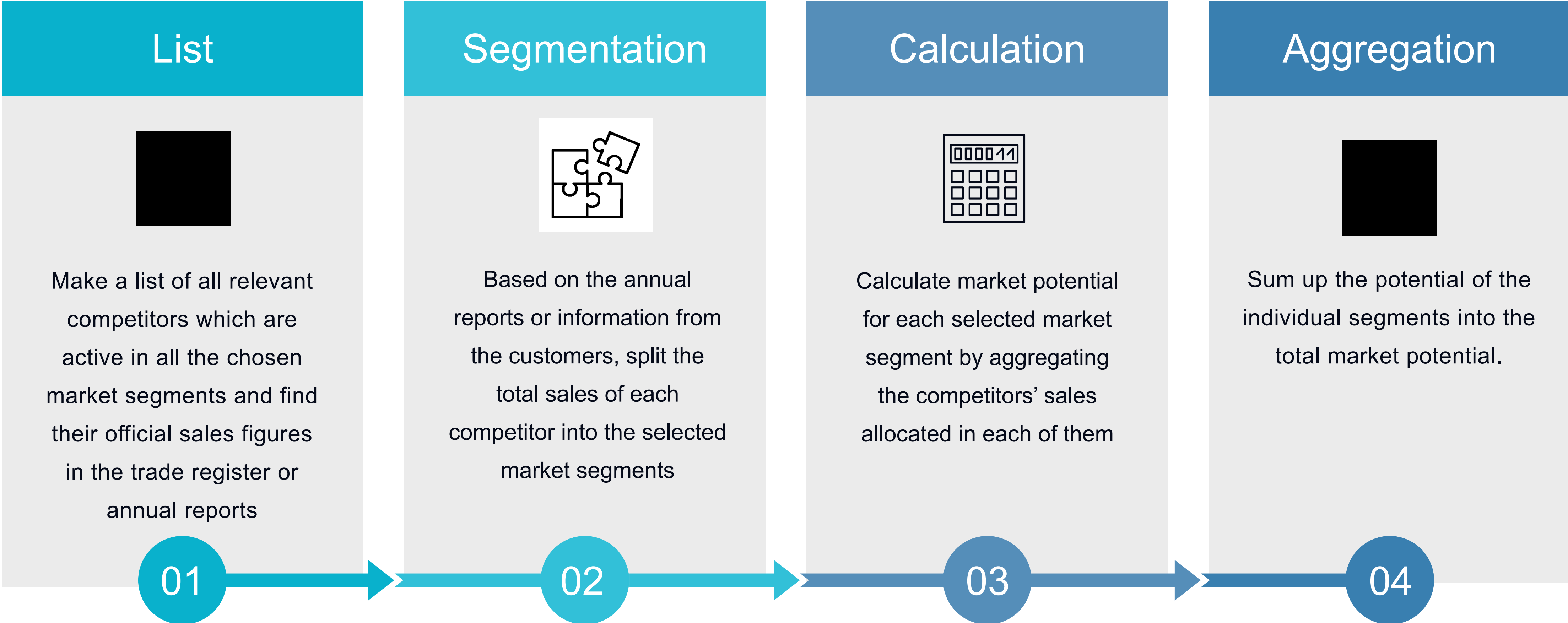
Market Potential Analysis

Horizontal

By Jakub Čech & Andrej Šišolák

# Horizontal Calculation Process

Consultancy Project | Market Potential Analysis | Horizontal



# Market Potential Sika CZ Case Study

Consultancy Project | Market Potential Analysis | Horizontal

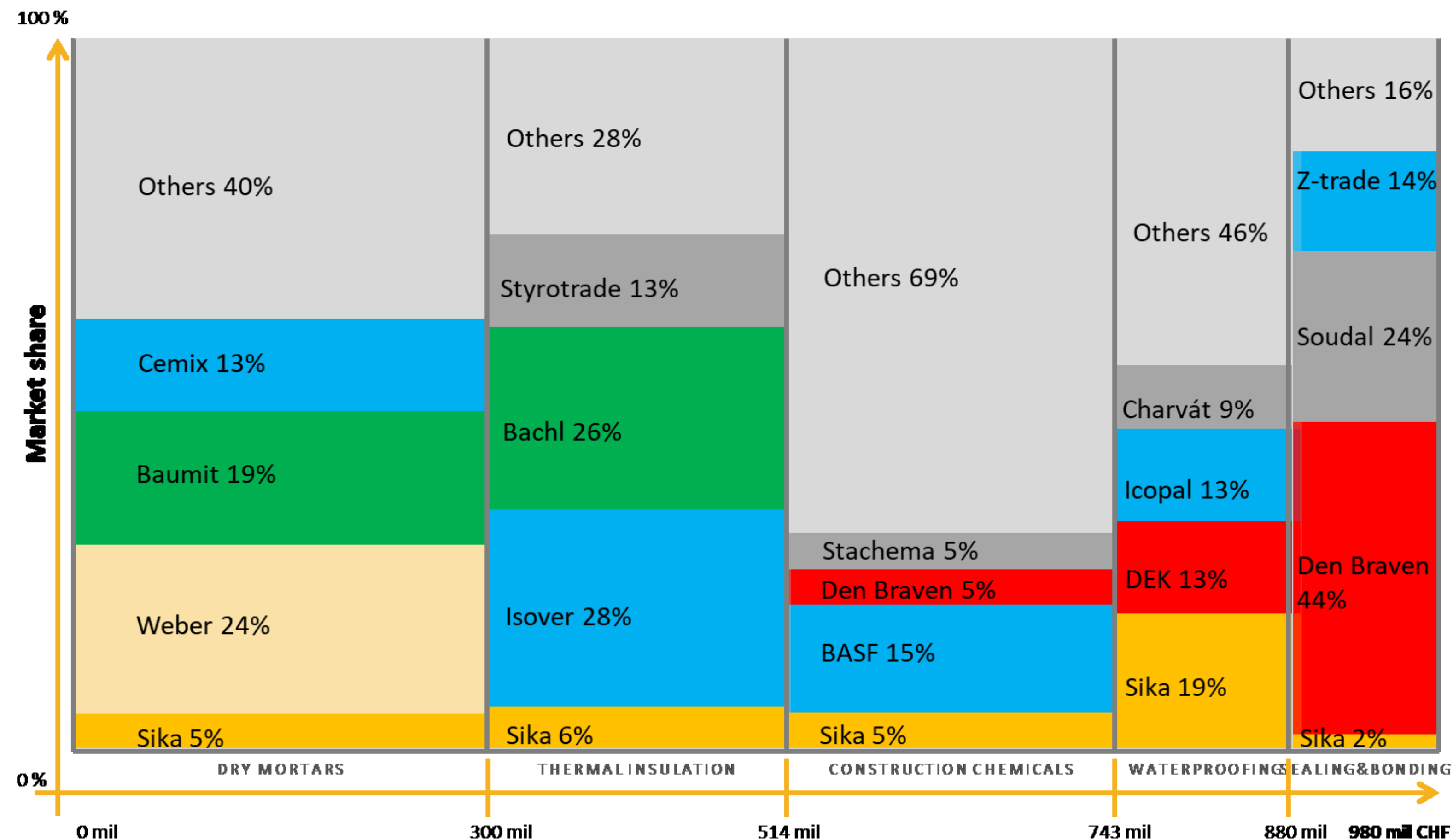
## Hard facts | Competitors' list:

Company name and address	Other affiliated brands and companies	Identification number	Product segments (DRY MORTARS-SOMS, Thermal insulations, Waterproofing, Construction chemistry, Industry, Sealing Bonding)	Presence in SIKA defined target markets (Concrete, Waterproofing, Refurbishment, Sealing Bonding, Flooring, Roofing, Industry)	Turnover - 2014 tCHF (Last available turnover 2014 or older)	Turnover 2015 tCHF	Turnover 2016 tCHF	Turnover tCHF 2017	Turnover 2017 final tCHF (including estimates of missing values)	WEB	% change in turnover 2014-2017
					Total turnover	Total turnover	Total turnover	Total turnover	Total turnover		
					1 994 571	2 115 612	2 456 697	2 327 820	2 850 929		
Sika CZ, s.r.o.	SCHÖNOX	49437151	ALL	ALL	32 744	36 595	36 986	39 898	39 898	<a href="http://www.sika.cz">www.sika.cz</a>	21,85
Krkonošské vápenky Kunčice, a.s.		48173029	SOMS	Waterproofing, Refurbishment, Flooring	19 473	17 964	17 565	18 862	18 862	<a href="http://www.kvk.cz">www.kvk.cz</a>	-3,14
KVK Parabit, a.s.		27537749	Thermal insulation	Waterproofing, Roofing	25 484	21 478	20 901	32 438	32 438	<a href="http://www.kvkparabit.com">www.kvkparabit.com</a>	27,28
3M Česko, spol. s.r.o., Praha 4, V parku 2343/24		41195698	Industry	Industry	63 674	72 226	76 794	N/A	79 190	<a href="https://www.3mcesko.cz/3M/cs_CZ/company-ct/">https://www.3mcesko.cz/3M/cs_CZ/company-ct/</a>	24,37
AC MARCA Czech Republic	Ceys	63668262	Sealing&Bonding	Sealing&Bonding	15 455	18 257	20 815	22 266	22 266	<a href="https://ceys.cz/">https://ceys.cz/</a>	44,07
Ardex Baustoff, s.r.o. Brno, Jihlavská 796/7a		26237679	Construction chemistry	Refurbishment, Flooring	798	708	694	N/A	603	<a href="http://www.ardex.cz/">http://www.ardex.cz/</a>	-13,04
ATEMIT, s.r.o., Brno, Olomoucká 1181/89		26888823	Construction chemistry	Flooring	3 849	3 886	3 455	5 214	5 214	<a href="http://www.atemit.cz/prumyslove-dekorativni-lite-podlahy/">http://www.atemit.cz/prumyslove-dekorativni-lite-podlahy/</a>	35,45
AU-MEX s.r.o., Praha 8,	Osmo	25349929	Sealing&Bonding	Sealing&Bonding	6 117	7 175	7 965	9 531	9 531	<a href="https://www.osmo.cz/">https://www.osmo.cz/</a>	55,81
AUTO - COLOR spol. s.r.o., Liberec, Ampérova 482	Dinitrol	18381201	Industry	Industry	3 583		3 750	4 291	4 291	<a href="http://www.a-c.cz/">http://www.a-c.cz/</a>	19,76
BACHL, spol. s.r.o., Modřice, Evropská 669		14503603	Thermal insulation	Refurbishment, Roofing	58 546	52 676	49 499	60 105	60 105	<a href="http://www.bachl.cz/">http://www.bachl.cz/</a>	2,66
BARVY A LAKY HOSTIVAŘ, a.s., Praha, Průmyslová		26765306	Construction chemistry	Sealing&Bonding, Roofing	47 656	49 322	53 812	52 785	52 785	<a href="https://www.bal.cz/">https://www.bal.cz/</a>	10,76
BASF Stavební hmoty Česká republika s.r.o., Chrudim IV, K Májovu 1244	PCI, Master Builders	49286242	SOMS, Construction chemistry	Concrete, Waterproofing, Refurbishment, Interior Finishing, Flooring	38 920	45 003	41 619	43 389	43 389	<a href="http://www.pci-cz.cz/">http://www.pci-cz.cz/</a> <a href="https://www.basf.com/cz/cz.html">https://www.basf.com/cz/cz.html</a>	11,48
Bauder s.r.o., Praha 10, Nad Vinným		62622439	Waterproofing	Roofing, Waterproofing	2 375	4 261	N/A	N/A	7 644	<a href="https://www.bauder.cz/">https://www.bauder.cz/</a>	79,40
BAUMIT, spol. s.r.o., Brandýs nad Labem-Stará Boleslav, Průmyslová 1841		48038296	SOMS	Refurbishment	29 495	59 132	53 267	56 960	56 960	<a href="http://www.baumit.cz/">http://www.baumit.cz/</a>	93,12
Berner spol. s.r.o., Praha 5, Jinonická 804/80		62582771	Industry	Industry	20 860	21 897	23 214	N/A	25 833	<a href="https://shop.berner.eu/cz-cs/">https://shop.berner.eu/cz-cs/</a>	11,28
Betosan s.r.o., Praha 4, Na Dolinách 148/28		48028177	SOMS, Waterproofing, Construction chemistry	Waterproofing, Refurbishment	2 618	2 710	2 209	N/A	1 864	<a href="http://www.betosan.cz/">http://www.betosan.cz/</a>	-15,64
BITUMAX, s.r.o., Mladá Boleslav		49977491	Waterproofing	Roofing, Waterproofing	4 920	5 132	N/A	N/A	5 352	<a href="http://www.bitumax.cz/">http://www.bitumax.cz/</a>	4,29
BODY COLOR, s.r.o. Turnov, Studentská 1727	H.B. Body	27543790	Industry	Industry	2 671	2 988	3 132		3 671	<a href="http://www.bodycolor.cz/">http://www.bodycolor.cz/</a>	17,23
BONA CR, spol. s.r.o., Čestlice, Obchodní 132		49976834	Construction chemistry	Sealing&Bonding	3 315	3 685	3 698	3 430	3 430	<a href="https://www.bona.com/cz/">https://www.bona.com/cz/</a>	3,46
BRALEP s.r.o., Praha 8, Třeboradická		48026913	SOMS	Sealing&Bonding	2 117	2 465	2 536	2 346	2 346	<a href="https://www.bralep.cz/">https://www.bralep.cz/</a>	10,83
BÜSSHER - HOFFMANN, s.r.o.		60737271	Waterproofing	Roofing, Waterproofing	6 298	7 725	6 862	N/A	7 476	<a href="https://www.bueho.com/cs">https://www.bueho.com/cs</a>	8,95
Cement Hranice, akciová společnost, Hranice,		15504077	SOMS	Refurbishment, Flooring	63 017	64 127	64 953	69 034	69 034	<a href="http://www.cement.cz/online/cz/Domcstrnka.html">http://www.cement.cz/online/cz/Domcstrnka.html</a>	9,55
CEMEX Cement, k.s. Prachovice, Tovární 296		27892638	Construction chemistry	Concrete, Flooring	83 622	107 156	69 614	90 285	90 285	<a href="http://www.cemex.cz/index.aspx">http://www.cemex.cz/index.aspx</a>	7,97
COMING Plus, a.s., Praha 4, Na vrstvách		25748793	Construction chemistry	Flooring	3 834	4 313	4 484	4 593	4 593	<a href="http://vvoj.coming.cz/">http://vvoj.coming.cz/</a>	19,79

# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Horizontal

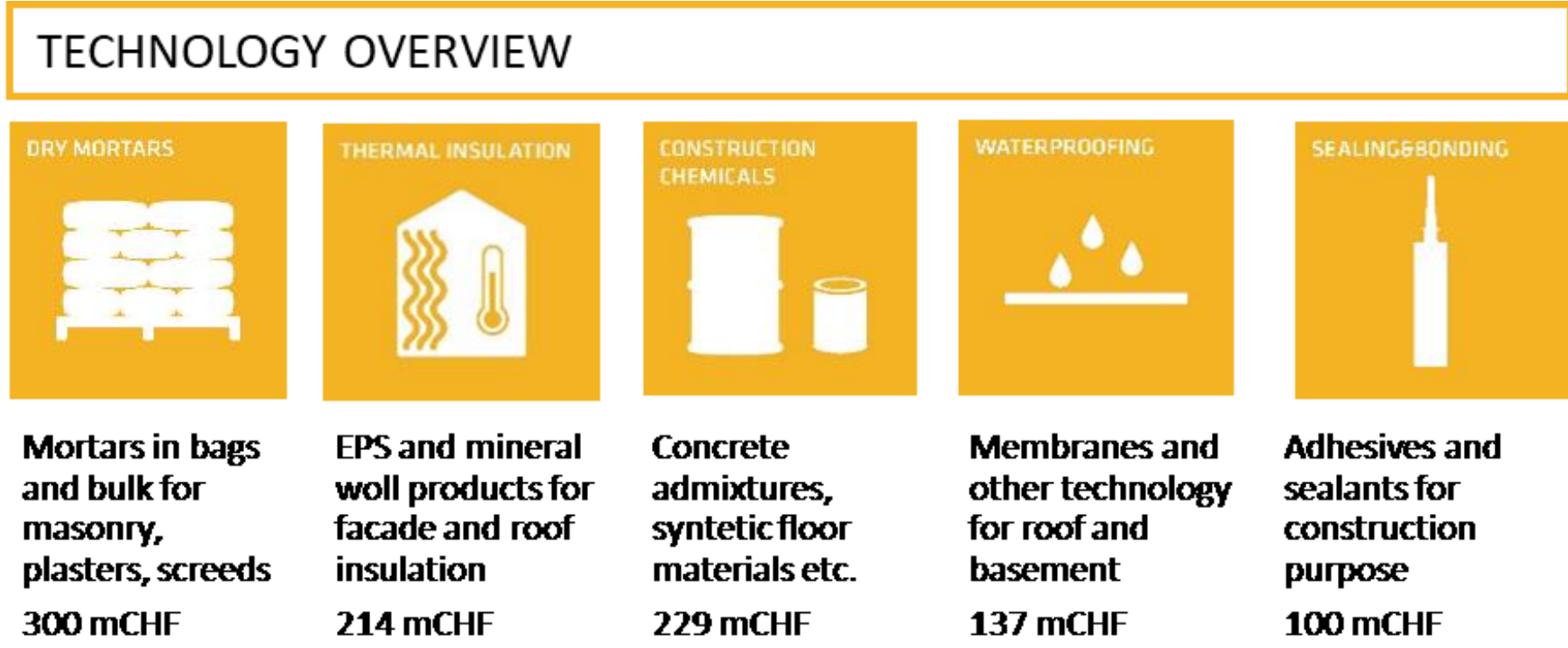
Allocation of the sales into the segments:



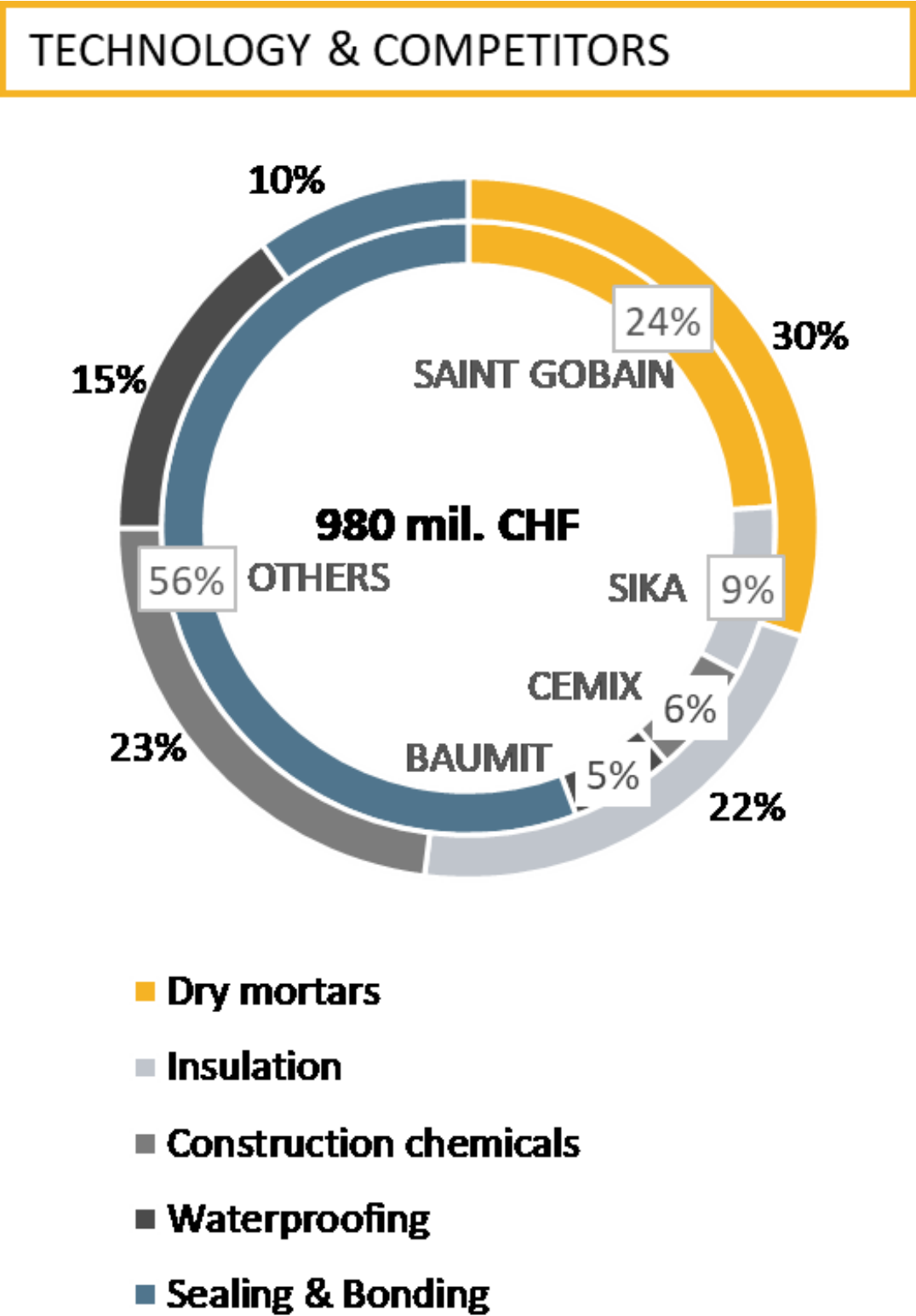
# Market Potential Sika CZ Case Study

Consultancy Project | [Market Potential Analysis](#) | Horizontal

## Total market potential:



- REMARKS
- Dry mortar segment represents biggest size and growth potential
  - Building chemistry covers all specialised materials for construction as concrete admixtures, resins, grouts, coatings and other specific construction products
  - Insulation segment includes all relevant technologies of thermal insulations and represents big size of potential but with low margins
  - Volume of each technology group is more less stable over the past few years
  - Changes are happening only inside the segments (i.e. switch from wool to EPS)
  - Market is conservative and introduction of new technologies is slow
  - Market is fragmented and the biggest market players are Saint gobain group companies folowed by Sika, Cemix, Baumit
  - Market consolidation is in progress
  - Biggest and international players are growing above average at the expense of small or by acqisitions





Market Potential Analysis

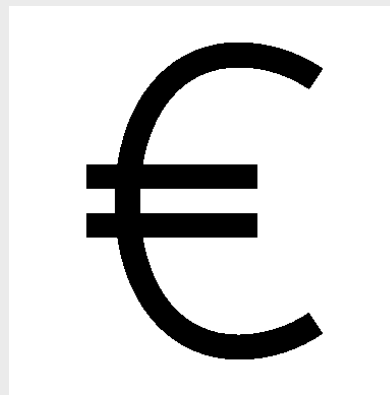
# Summary

By Jakub Čech & Andrej Šišolák

# Summary Of Market Potential Calculation

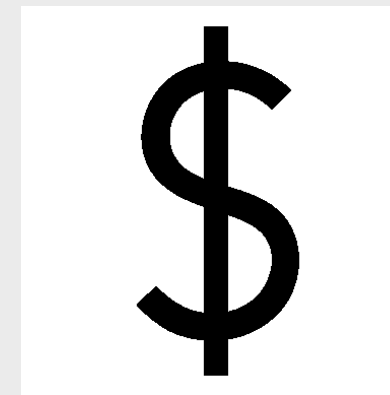
Consultancy Project | [Market Potential Analysis](#) | Summary

## Top Down



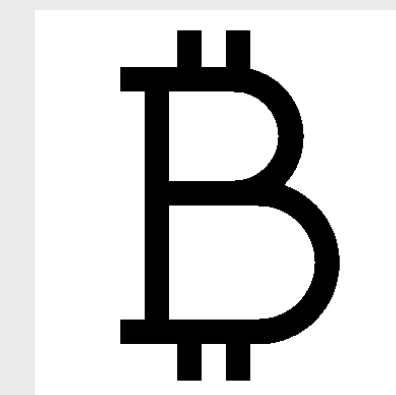
Total value of market potential  
calculated based on the statistic  
methodology

## Bottom Up



Total value of market potential  
calculated based on customer'  
product basket methodology

## Horizontal



Total value of market potential  
calculated based on competitors  
methodology

Thank You  
For Your Watching

Jakub & Andrej