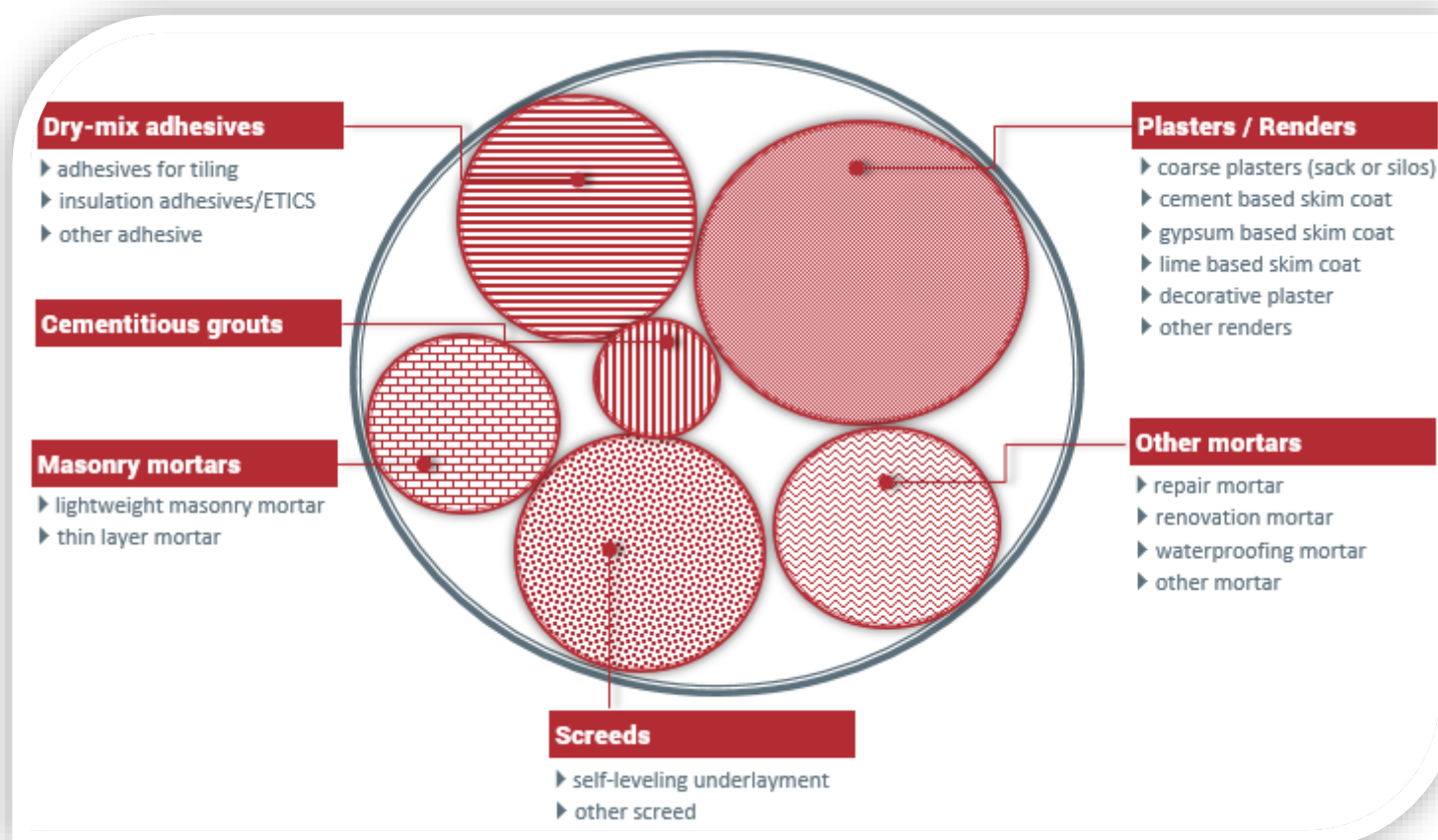


# DRY-MIX ADHESIVES & MORTARS MARKET

EUROPE | 2012 - 2023

Sector Analysis | 6<sup>th</sup> Edition



Feb  
2018

Analysis | 2012–2017. Outlook | 2018-2023

# Dry-mix Adhesives & Mortars Market in Europe

ANALYSIS, 2012 – 2023

“In 2017 the market reached 79 mln tons and €16 bln (decorative plasters included). Germany share ~17%, Turkey – 12% and Russia – 11%. Until 2023 the market will record a CAGR of 3%, up to 95 mln tons”

InterBiz

Interbiz GmbH Vienna & Interbiz SRL Bucharest updated and improved the analysis “Dry-mix Adhesives & Mortars Market, Europe, 2012 – 2023”, 41 countries.

This report, now into its 6<sup>th</sup> edition, reflects the impact of recent economic events and the development trends of Dry-mix Adhesives & Mortars Market in Europe, by country.

The report provides:

- a clear and comprehensive picture of the market
- influence factors and trends
- market potential
- demand forecast to 2023
- competitive environment analysis.



With just-in-time updated market data and continuous follow-up of market news, this report represents a milestone for all entities involved in this sector.

## Market breakdown analysis (main range of products)

- masonry mortars
- plasters /renders
- dry-mix adhesives
- screeds
- tile grouts
- other mortar

## Competitive landscape of the market



## METHODOLOGY USED

### 360° data collection / desk research:

- public institutions (national statistics – especially foreign trade, agencies, ministries, authorities)
- companies involved in the sector (manufacturers/importers of dry mix mortars, professional associations, main wholesalers/retailers, suppliers of raw materials – additives, cement, lime, gypsum).  
During the research, we sent a questionnaire to fill to 1 861 of dry-mix mortars suppliers and 547 retailers & wholesalers.
- mass media monitoring

### data processing / biz intelligence:

- analysis of related markets (cement, gypsum, lime, ceramic tiles, EPS&XPS, masonry, plasterboards, new buildings, repairs & renovations, habits, construction market particularities)
- the inputs are placed in a matrix and correlations are made
- the unlikely variants are excluded, and the likely variants are kept and bring into final form
- the forecasts are based on isoquant theories.

## TERMS & MENTIONS ABOUT THE ANALYSIS

→ Price:	detailed by country (table below)
→ Language:	English and German (upon request)
→ Information structure:	text, table, charts
→ Format:	Adobe Acrobat
→ Delivery term:	Feb & Mar 2018
→ Payment term:	1 <sup>st</sup> option: 14 days based on the invoice upon purchase order or contract 2 <sup>nd</sup> option: 1 day after report delivery or prepayment, enclosing 3% discount
→ Continuity:	JIT updates

## ANALYSES OF “DRY MIX ADEHSIVES & MORTARS MARKET” AVAILABLE | Europe & by Country | Edition 2018

COUNTRY	PRICE	RELEASE DATE	COUNTRY	PRICE	RELEASE DATE
<b>EUROPE (41 countries)</b>	<b>€ 4 800</b>	<b>Feb -'18</b>	Poland	€ 1 250	Feb -'18
Germany	€ 1 450	Feb -'18	Slovakia	€ 1 150	Feb -'18
Italy	€ 1 350	Feb -'18	Estonia	€ 950	Mar -'18
France	€ 1 350	Feb -'18	Hungary	€ 1 200	Feb -'18
Spain	€ 1 350	Feb -'18	Latvia	€ 950	Mar -'18
Austria	€ 1 300	Feb -'18	Lithuania	€ 1 050	Mar -'18
United Kingdom	€ 1 300	Mar -'18	Romania	€ 1 250	Feb -'18
Denmark	€ 1 100	Feb -'18	Bulgaria	€ 1 150	Feb -'18
Sweden	€ 1 250	Feb -'18	Norway	€ 1 250	Mar -'18
Netherlands	€ 1 150	Feb -'18	Switzerland	€ 1 250	Mar -'18
Finland	€ 1 050	Mar -'18	Croatia	€ 1 250	Mar -'18
Ireland	€ 1 100	Mar -'18	Serbia	€ 1 000	Mar -'18
Belgium	€ 1 100	Feb -'18	Turkey	€ 1 450	Mar -'18
Greece	€ 1 150	Mar -'18	Russia	€ 1 440	Mar -'18
Portugal	€ 1 150	Feb -'18	Ukraine	€ 1 250	Mar -'18
Slovenia	€ 950	Feb -'18	Belarus	€ 1 360	Mar -'18
Czechia	€ 1 250	Feb -'18	Moldova Republic	€ 1 000	Mar -'18

### Discount policies

No. of reports	Discount	No. of reports	Discount
2 - 4 countries	3%	16 – 20 countries	15%
5 – 10 countries	6%	21 – 30 countries	25%
11 – 15 countries	10%	<b>ALL 36 countries</b>	<b>30%</b>

**TABLE of CONTENTS****AVAILABLE FOR EUROPE (41 countries).** *The same ToC is available for every country***Dry-mix Adhesives & Mortars Market | EUROPE or COUNTRY | 2012 - 2023****1. DEFINITIONS & SEGMENTATION****2. GENERAL DATA**

- 2.1. GDP & Construction Sector | 2012 – 2017. Forecast 2018 – 2023
- 2.2. Construction market | by type | 2012 – 2017. Forecast 2018 – 2023
- 2.3. Investments in construction | 2012 – 2017. Forecast 2018 – 2023
- 2.4. Housing stock | by age | by type | by country
- 2.5. Building permits | by type | by country | 2012 – 2017. Forecast 2018 – 2023
- 2.6. Dwelling completions | by type | by country | 2012 – 2017. Forecast 2018 – 2023
- 2.7. Main building materials market in Europe | by country | volume | by type | 2012 – 2017  
Type of building materials: cement, lime, gypsum, clay bricks, AAC, ceramic tiles, EPS/XPS, mineral wool, plasterboards

**3. DRY-MIX ADHESIVES & MORTARS MARKET IN EUROPE | 2012 – 2017 (41 COUNTRIES)**

- 3.1. Characteristics & trends
- 3.2. Availability of raw materials for domestic production. Prices.
- 3.3. Foreign trade analysis | volume & value | 2012 – 2017
- 3.4. Dry-mix adhesives & mortars market | consolidated Europe | by type | volume & value | 2012 – 2017  
Type of dry-mix adhesives & mortars:
  - Masonry mortars (bricklaying dry mortars | dry adhesives)
  - Plasters / renders (of cement / lime / gypsum / mix / top coat)
    - coarse plasters / renders (mechanized & manual)
    - skim coats (fine plasters / renders, <10 mm thickness)
    - decorative plasters (top coats, polymer-based & mineral)
  - Screeds/floors
    - coarse
    - self leveling floor compound
  - Dry adhesives
    - tile adhesives
    - insulation adhesives / ETICS
    - other adhesive
  - Tile grouts
  - Other mortars
    - repair
    - waterproofing
    - others
- 3.5. Dry-mix adhesives & mortars market total | by country | volume & value | 2012 – 2017  
...and mapping of main 33 countries:
  - Total market evolution, volume & value, 2012 – 2017
  - Market breakdown by type of dry-mixture (see above), 2017
  - Competitive landscape | market share | volume 2016
- 3.6. Dry-mix adhesives & mortars, breakdown by type | volume | 2013 & 2017  
Tiling adhesives, breakdown: Normal, Flexible, Super-flexible  
Coarse plasters, breakdown: Cement based, Gypsum based, Lime based, Blend of binders  
Decorative renders (top coat), breakdown: Mineral based, Polymer based  
Screeds/floors, breakdown: Coarse, Self-leveling floor compound, Industrial top floor screed  
Cementitious waterproofing, breakdown: One component (1K), Two components (2K)

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- 4.1. Main figures of competitive environment | 2012 - 2016
- 4.2. Top 20 players | by consolidated revenues in Europe | 2012 – 2017
- 4.3. Regional development of main players | European map
- 4.4. Market share | total market | volume & value | 2012 - 2016
- 4.5. Positioning of the players by range of products / perceptual maps
- 4.6. Presentation of the main players

## 5. DISTRIBUTION & PRICES

- 5.1. Distribution network of dry-mix adhesives & mortars
- 5.2. Prices of main dry-mix adhesives & mortars (representative selection, by brand, by country)
- 5.3. Margins in sales channels, by country

## 6. DEVELOPMENT POTENTIAL & TRENDS

- 6.1. Development potential
- 6.2. Construction works
  - New buildings – trends
  - Housing renovation | Energy Efficiency
- 6.3. Trends & growing sub-sectors of dry-mixtures
- 6.4. Analysis of the market on medium and long term. The gap between production capacities and consumption. Analysis of maturity point. Comments.

## 7. FORECAST OF DRY-MIX ADHESIVES & MORTARS MARKET | 2018 - 2023

### 7.1. Forecast of dry-mix adhesives and mortars market | total Europe | by type | volume & value | 2018 – 2023

Type of dry-mix adhesives & mortars:

- Masonry mortars (bricklaying dry mortars | dry adhesives)
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  - insulation adhesives / ETICS
  - other adhesive
- Tile grouts
- Other mortars
  - repair
  - waterproofing
  - others

### 7.2. Forecast of dry-mix adhesives and mortars market total | by country | volume and value | 2018 – 2023

- 7.3. Possibility to launch new products into the market
- 7.4. Outlook of sales of dry adhesives & mortars, by country

## 8. CONCLUSIONS

Please do not hesitate to contact me if you require further information!

Kind regards,

**Frank Gregor SCHMIDT**

Business Development Manager

Interbiz GmbH

**Interbiz**  
research • consulting

Phone: +43.680.141.8.943

eMail: [Frank.Schmidt@interbizgroup.at](mailto:Frank.Schmidt@interbizgroup.at)

[www.interbizgroup.ro](http://www.interbizgroup.ro)

[www.interbizgroup.at](http://www.interbizgroup.at) (in progress)

**Interbiz GmbH | Vienna**

Gisela-Legath-Gasse 5/1

AT-1220, Vienna

Fiscal Code: ATU70373801

Vienna, Austria

**Interbiz Resco SRL | Bucharest**

(Electromagnetica Business Park - office)

Intr. Smardan no. 13, Bragadiru, Ilfov

Fiscal Code: RO 36689349

Bucharest, Romania