



PARIS
23 - 28 APRIL 2018

INTERNATIONAL EXHIBITION
FOR CONSTRUCTION
AND INFRASTRUCTURE

Co-located with



BUILDING TOMORROW, TODAY

PRESS KIT

SEPTEMBER 2017

ISABELLE ALFANO,

DIRECTOR, CONSTRUCTION BUSINESS UNIT
INTERMAT EXHIBITION DIRECTOR



Uniting construction professionals along the entire value chain to deliver efficiency to regions.

In a global society undergoing major change, and considering the increasingly pressing requirements for buildings and infrastructure, a wide and varied range of projects is emerging in France and around the world, offering an unprecedented springboard for creativity and inventiveness.

The players in the construction and infrastructure sector are thus ready and prepared to offer lasting responses to changes in communities resulting from new economic, societal and environmental conditions, but also to changes in the behaviours and expectations of citizens. Building contractors, manufacturers and suppliers of construction equipment and solutions, distributors - all of whom exhibit at and visit INTERMAT Paris - are key operators for territorial development while taking these imperatives into account.

In every region of the world, they are obliged to deliver on ambitious development objectives: those of growing urbanisation, the expansion of city regions, energy infrastructure, connectivity, environmental protection, etc. It is therefore vital to support them in bringing their projects to life and helping them thrive in the long term: the projects of today that will shape our communities of tomorrow.

This new approach entails deploying synergies between all of the construction sector's stakeholders. This is why INTERMAT Paris is the platform which today unites all of the profession's actors, with the aim of developing communities and regions efficiently and consistently.

As a leading international event in the construction and infrastructure calendar, the vocation of INTERMAT Paris is to combine all of the ingredients of efficiency, but also all the sources of innovation and inspiration to serve the projects of the future. With its strong position in the EMEA zone (Europe, Middle East and Africa), this meeting has over the years become a unique opportunity for profitable meetings between all international construction market figures.

To address current and future challenges, the upcoming edition, held from 23 to 28 April in Paris, will resolutely fly the flag of renewal, with:

- new perspectives on French and high-potential and developing markets;
- a new sector organisation attuned to supply and demand;
- a new economic Observatory for the construction sector for the years to 2025-2030;
- new fully-targeted and qualified business development tools.

The six days of the event will also feature a number of special theme days, talks, lectures, round tables and visits by foreign delegations, rounding out a unique programme to support tomorrow's construction projects, reach high-potential and developing regions, encourage business with a qualified and diverse ecosystem, and highlight the innovations of the future in a fast expanding global market!

CONTENTS

p.4 CONSTRUCTION AND INFRASTRUCTURE: A FAST-EVOLVING MARKET

- The development of tomorrow's communities: challenges and levers
- A noticeable change in use cases in the sector in response to territorial challenges
- What construction industry leaders say

p.9 INTERMAT PARIS, AN EXHIBITION AT THE HEART OF THE CONSTRUCTION AND INFRASTRUCTURE SECTOR'S ISSUES

- Vision & Ambition
- Factsheet

p.14 INTERMAT PARIS: A NEW ORGANISATION ATTUNED TO SUPPLY AND TO THE DEMANDS OF COMPANIES

- A new product offering structured into 4 hubs of expertise
- The rental and distribution sector represented
- Theme villages: innovation and new technology under the spotlight
- INTERMAT Demo: A unique demonstration zone
- World of Concrete Europe (WOC Europe): An event within the event
- Innovative business development tools and services

p.26 ESSENTIAL EVENTS ORGANISED PRIOR TO THE SHOW, PROMOTING...

- ... major projects of the future, with the INTERMAT Construction Observatory
- ... innovation
- ... regions

CONSTRUCTION AND INFRASTRUCTURE: A FAST-EVOLVING MARKET

THE DEVELOPMENT OF TOMORROW'S COMMUNITIES: CHALLENGES AND LEVERS

The construction and infrastructure market is returning to growth, with promising development perspectives between now and 2030. The sector's buoyant economic health could potentially help to close the worldwide gap between required infrastructure investment and current investment trends¹.

Regions and territories are faced with the need to address today, for tomorrow, ambitious development objectives, in view of current and future challenges: growing urbanisation, the expansion of city regions, energy infrastructure, connectivity, environmental protection, and so on.

Expected to account for 14.5% of global GDP in 2030², the construction and infrastructure sector is, along its entire value chain, an essential lever in this regional dynamic and, as a result, a source of economic, social and environmental value creation.

With major projects such as Grand Paris Express in France, the extension of the Al Maktoum Airport in Dubai, the construction of the Brenner Tunnel between Italy and Austria, and the fourth southern Algiers bypass, the EMEA zone (Europe, Middle East, Africa) offers a multitude of opportunities for professionals working in the construction sector. Faced with these colossal projects, it is imperative to support building contractors. By constantly addressing their needs, construction equipment and solutions, an essential link in the building and public works sector, will help to guarantee the accomplishment and durability of their projects.

INTERMAT Paris, the international trade show for construction and infrastructure, is fully committed to this fast-evolving market and fulfils the expectations of the sector's players: building contractors, manufacturers and suppliers of construction equipment and solutions, and distributors.

(1) Global Infrastructure Hub - <https://outlook.gihub.org/>

(2) Atelier BNP Paribas - http://www.atelier.net/trends/articles/construction-tech-digitalisation-btp-marche_442435

Compound annual growth rate (CAGR) forecast for construction market between 2014-2017 ⁽³⁾

+3.9%

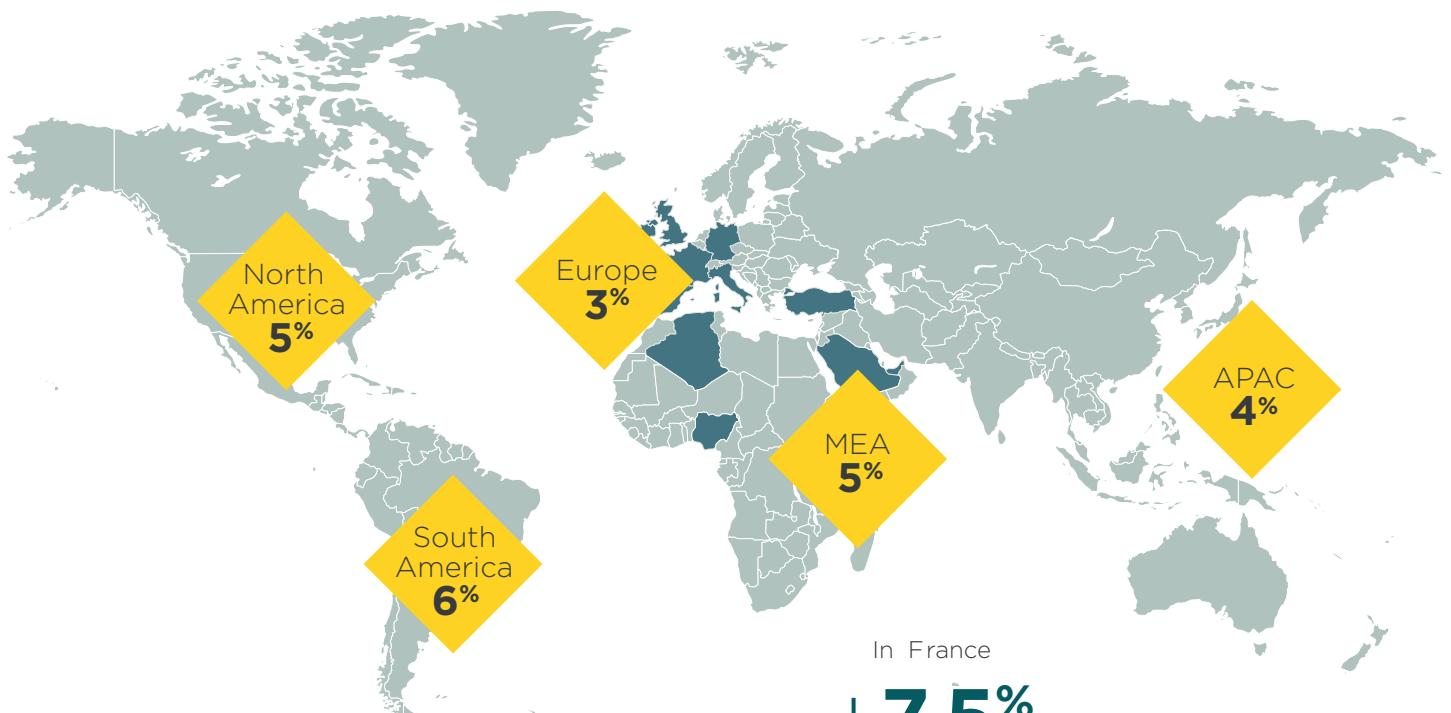
average annual growth in global construction market by 2030 set to reach an estimated US\$17.5 trillion⁽¹⁾

14.5%

contribution of construction and infrastructure sector to GDP in 2030⁽²⁾

+24%

in sales of construction equipment forecast between 2016 and 2020⁽²⁾



In France

+7.5%

annual growth in **total sales** of construction machinery in 2017 and **+15%** forecast in 2018.



Compound annual growth rate (CAGR) forecast for construction market between 2014 and 2017 ⁽³⁾

⁽¹⁾ Global Construction 2030

⁽²⁾ Oxford Economics : <https://gcp.global/uk/products/global-construction-2030>

⁽³⁾ Off Highway Research

FOCUS

Europe



Grand Paris Express with 200 km of network, the construction of 68 stations and the development of new districts, but also the future cross-border Brenner Tunnel between Austria and Italy are all substantial construction and infrastructure projects which offer proof of the sector's recovery.

According to the research institute Euroconstruct, the Building and Public Works sector experienced 2% growth in 2016.

Despite the Brexit vote and several ongoing elections in the European Union, growth for 2018 and 2019 is forecasted at between 2.1% and 2.2% in Europe.

Africa



The social and economic transformations in Africa such as exponential population growth, urban development or the increase in the middle classes and younger generations, have all boosted construction projects, an increase estimated at 17% on the continent¹, mainly in the areas of transport and energy.

Ivory Coast has implemented a National Development Programme for 2016-2020 which should stimulate growth in the building and public works sector to the tune of 9.6% over this period. In addition to an ambitious development programme, the Ivorian government has also set itself the priority of building 30,000 social access dwellings per year.

In Algeria, the Building and Public works sector recorded 5.6% growth in 2016. The orbital highway (4th southern bypass) around Algiers running 260 km, and the objective of building 1.6 million dwellings in the country by 2019 offer proof of the vitality of the sector.

(1) Source: Deloitte, Africa Construction Trends Report 2016.

Middle East



While still being dependent on revenue from petroleum exports, the economies of Middle Eastern countries are beginning to diversify substantially. Turkey, the United Arab Emirates and Saudi Arabia are the home to large scale projects which are powerful levers for economic attractiveness and development.

In view of their continued development, the United Arab Emirates for example, continue to focus on the "hub" of Dubai, ideally positioned between Europe and Asia. As a true platform for the region, the city is to host EXPO 2020, which should attract more than 25 million visitors between October 2020 and April 2021 and is already stimulating growth in the country (infrastructure, transport, hotels, etc.). In this respect, several major projects have already commenced, such as the extension of the metro over more than 15 km, the construction of around ten bridges and tunnels and of the new Al Maktoum airport whose capacity will be increased to 160 million passengers. While lower oil prices have impacted growth, the country's fundamentals remain solid.

Source: INTERMAT Construction Observatory

A NOTICEABLE CHANGE IN USE CASES IN THE SECTOR IN RESPONSE TO TERRITORIAL CHALLENGES

INTERMAT has witnessed a profound transformation in the construction equipment and solutions sector over the past thirty years.

A transformation in terms of:

- **solutions in their own right:** multi-function, compact equipment, compatible with city centre worksites, digital, eco-friendly and which pay more consideration to the operator;
- **but also in use cases:** work efficiency, digital and circular.

> **A shift from the product to its utilisation: rental and sustainable development go hand in hand.**

Offering the opportunity to utilise the capital whilst also providing access to a wider range of equipment, the rental market which is experiencing substantial growth today, fulfils sustainability objectives.

According to the European Rental Association, equipment rental offers an array of benefits.

Equipment rented out is used more frequently and rental firms obtain positive performances in areas such as operation, energy efficiency, waste management, health and safety. Dialogue between manufacturers and rental companies encourage the former to incorporate sustainable development factors into the design of the equipment.

> **Digital economy: Construction Tech**

In view of these issues, investments in digital technology in the sector reportedly increased fivefold between 2010 and 2015, rising from 51 to 254 million dollars (source: CB Insights). The Construction Tech sector is seeing the arrival of a great many start-ups: Traktor for equipment sharing, Finalcad for site supervision; Opensafe for the management of personal protective equipment (PPE), etc.

Today, certain technological innovations in products and services offer the chance to fulfil the new socio-economic and environmental requirements of projects, and anticipate new ones.

WHAT CONSTRUCTION INDUSTRY LEADERS SAY



JEAN-LOUIS MARCHAND,
Chairman of European Construction Industry Federation (FIEC)

" [...] **In the area of innovation, the big trend of the moment is digitalisation** [...] Our goal is to promote digitalisation in the construction sector to enable it to get the most out of this technological revolution! Some countries and some companies have already made great progress in this area. We want companies of all sizes to be able to jump aboard the train. If they are unable to adapt in time, contractors risk finding themselves disqualified. Our mission as European and national trade federations is to help our members cross this threshold. We are already exchanging a lot about all of the good national initiatives which have been deployed to help our companies take their first steps.

Next, our role is also to raise awareness among public sector decision makers so that they also promote digitalisation, but in a way that leaves nobody by the wayside. It is important for example that the different systems implemented are interoperable, that their access is open to all at reasonable cost. This is particularly true when addressing the issue of electronic public procurement, which is starting to gain ground under the impulsion of the latest revised European directives in the area.

[...] The major meetings of the industry such as INTERMAT are always excellent opportunities for European companies to make themselves known across borders, present their know-how and build contacts with a large number of potential clients and suppliers. At the same time it is also a good way for these same contractors to discover new market trends, including internationally, cutting edge techniques and technology in the sector, new materials and new machines, etc. It is particularly a good time to make some great deals!

It is a very good thing that there are so many companies attending from all over the world. It goes to further reinforce the sharing of experience and expertise in the sector. "

BRUNO CAVAGNÉ,
Chairman of the French National Public Works Federation (FNTP)



" [...] **With regard to the permanent quest for improvements in productivity and in a perspective of market recovery,** investments are closely incorporated into the policies of public works contractors and more specifically in machines, which are the most essential tools for our construction sites. Manufacturers have a wide range of areas in which to innovate: equipment lifecycle, reduction of noise and greenhouse gas pollution or energy consumption, or resource recycling [...].

INTERMAT is an exceptional venue for exchanges and is the ideal setting in which professionals, the profession's players and partners, can meet up around the new equipment showcase. This gathering is important for our profession. It is the opportunity to meet equipment manufacturers, learn the latest on new machines, gauge the developments and innovations that have been added, and therefore imagine what our work sites will be like tomorrow. I am sure that this edition, just like the previous ones, will help to offer a fresh view of the key issues affecting economy and the environment of the Public Works equipment sector. "

JACQUES CHANUT,
Chairman of FFB (French Building Federation)



" [...] **One of the big issues in Building today is BIM.** It represents a natural but major change in our professional practices. Like with all forms of change, BIM requires human and technical investment. It means taking a long, hard look at one's own working methods [...].

BIM is a source of opportunities which will help each player in the building industry to be more efficient and dialogue better with others. It will mean less time spent on time-consuming and low added value tasks such as re-entering data. 3D will allow for a better understanding of the project. BIM will also contribute to better interface management [...]. "

INTERMAT PARIS, AN EXHIBITION AT THE HEART OF THE CONSTRUCTION AND INFRASTRUCTURE SECTOR'S ISSUES

VISION & AMBITION

To successfully accomplish construction projects whilst guaranteeing the competitiveness of the sector's firms, it is essential to promote, create and develop powerful synergies between all industry professionals: building contractors, manufacturers and suppliers of equipment and solutions, service companies (project and process management, etc.), order principals, contracting authorities, etc.

It is necessary to build all of these players into an overall, overarching and borderless plan, combining urban, architectural, environmental and social strategies to rise to the challenges of guaranteeing the efficiency of regions:

- Resource management and circular economy
- Connectivity
- Mobility
- Deconstruction and modularity of buildings
- Safety and living conditions (noise and air pollution, etc.)
- Cost efficiency.

This is why INTERMAT Paris is such a unique platform, uniting all of the players in the construction and infrastructure sector, to embody and represent a single market dedicated to the efficiency of territories in this geographical zone.

With its privileged position on French-speaking markets and more widely those with a particular French cultural influence, INTERMAT Paris is an imperative trade show bringing together supply and demand in the construction domain for EMEA zone markets.

In addition to French, Mediterranean and African markets, INTERMAT Paris continues to provide access to other high-potential countries, such as those in the Middle East and the Balkans.



JEAN-CLAUDE FAYAT,

Chairman of CISMA, French association of equipment manufacturers for construction, infrastructure, steel and handling equipment industries

" [...] INTERMAT should be seized as an opportunity to hold board meetings and annual general meetings of trade associations, federations and European bodies... of customer segments. [...]"



JEAN-MARIE OSDAIT,

Chairman of SEIMAT (Trade association for international companies dealing in machinery and equipment for public works, mines, quarries, buildings and lifting)

" [...] 2018 will be a beneficial year in which to develop more business at INTERMAT.

We are counting on the attendance of a large number of visitors from both France and abroad, attracted by the international image of an unmissable show. With its exclusive access to professionals from the South of Europe, Mediterranean countries, North Africa and Northern Europe, all very much attracted to the flagship destination of Paris, the show will offer our companies some very promising development opportunities. "

FACTSHEET

- Dates: **23 - 28 April 2018**
- Venue: **PARIS-NORD EXHIBITION CENTRE - FRANCE**
- Opening hours: **DAILY FROM 9.00AM TO 6.00PM**
- Frequency: **EVERY 3 YEARS**

Organisers:

S.E. INTERMAT brings together:

- the trade organisations of equipment manufacturers and importers:
 - > **CISMA**, the French association of equipment manufacturers for construction, infrastructure, steel and handling equipment industries (www.cisma.fr);
 - > **SEIMAT**, the French association of international civil engineering, mining, construction and hoisting equipment industries (ww.seimat.fr);
- and **COMEXPOSIUM**, one of the world leaders in event organisation, is involved in more than 170 consumer and trade events, covering 11 different sectors of activity such as food, agriculture, fashion, homeland security, construction, high-tech, optics and transport. COMEXPOSIUM hosts 45,000 exhibitors and more than 3 million visitors in 26 countries around the world.



INTERMAT Paris comprises:

- An indoor exhibition zone
- An outdoor exhibition zone
- A demonstration zone.

Exhibitors

- **1,500** exhibitors
- **70%** from outside France
- **40** countries

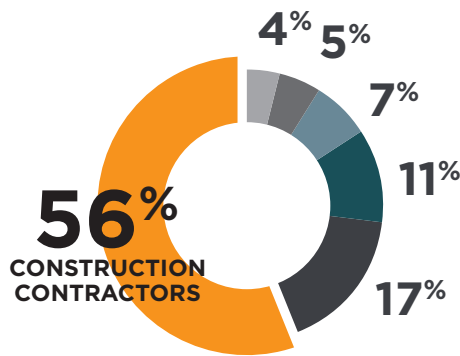
- **4** sectors of activity for optimal clarity



Visitors

- **183,000** visitors
- **35%** non-French
- **167** countries
- **81%** of visitors* from Europe, Africa & Middle East
- **50%** out of the TOP 100 largest worldwide construction contractors visit INTERMAT (Top 200 - KHL, 2016)
- **2** visitors out of **3** are decision makers, purchasers or specifiers

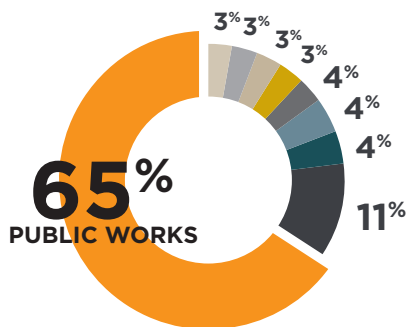
VISITORS BY SECTOR OF ACTIVITY



- ◆ **INDUSTRY 17%**
(manufacturers, mine and quarry operators, concrete producers, etc.)
- ◆ **TRADING 11%**
(distributors, dealers, importers, etc.)
- ◆ **SERVICES 7%**
(design/research consultancy, technical center/laboratory, transport, etc.)
- ◆ **CONTRACTING AUTHORITIES, OWNERS 5%**
(architects, surveyors, town planners, landscapers, local councils, etc.)
- ◆ **RENTAL INDUSTRY 4%**

FOCUS ON BUILDING CONTRACTORS

(56% of all visitors)



- ◆ **EARTHMOVING 11%**
- ◆ **ROAD BUILDING 4%**
- ◆ **DEMOLITION 4%**
- ◆ **GENERAL CONSTRUCTION 4%**
- ◆ **CIVIL ENGINEERING 3%**
- ◆ **ROAD & UTILITY SERVICES 3%**
- ◆ **STONEMWORK 3%**
- ◆ **LIFTING, HANDLING 3%**

*Source: INTERMAT 2015 visitor surveys

The expectations of construction leaders supporting INTERMAT Paris



BERIC SCALABRE,
Equipment Director, BOUYGUES

" 2016 was an extension of previous years. Our objectives for the coming years are based around safety, innovation and digitalization. [...]"

" [...] What we expect of INTERMAT is a good understanding of our ecosystem and a technological watch around the improvement of working conditions, innovation and digitalization. [...]"



DIDIER THEVENARD,
Equipment Director, EUROVIA, VINCI Group

" Our innovation initiatives are firmly rooted in both digital and energy transition, in terms of the acceptability and perception of our machines. We explore and test all of the subjects of the future, with the user experience as the key development driver. It is through the needs observed from the feedback by the user and the end operating client, that we build solutions that are both simple and innovative. And because everyone has the same problems but not always the same solutions, we make a point of adopting local solutions that can be developed on a global level. [...]"

" [...] We expect above all to see genuine pointers to innovation in terms of risk prevention, energy consumption or other themes that correspond to the future needs of users. I personally am anticipating three important visit sequences: the first will help me offer my company director guests the best possible welcome; the second will be about relations with all of my suppliers; and a third will aim at hunting out innovations for the future. Beyond the power and basic features of a machine, what's most important is the notion and added value of acceptability to cater to expectations regarding the environment, energy use and risk prevention. [...]"

XAVIER BARTHELEMY,
Equipment Director, EIFFAGE

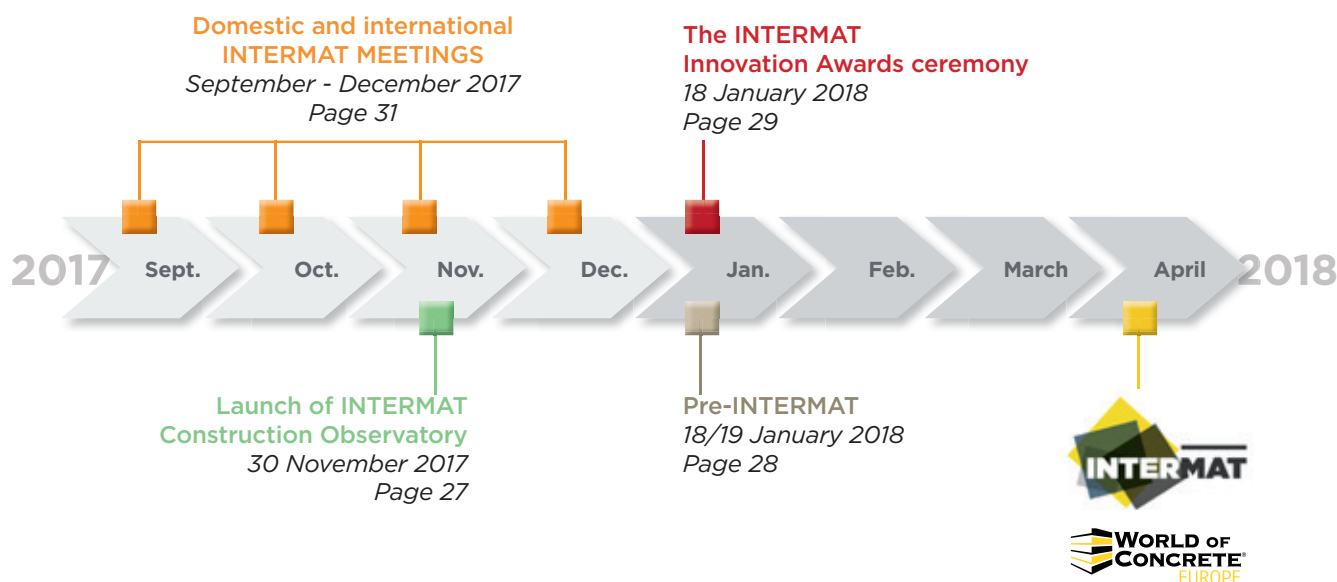


" [...] In terms of innovation we are still very attentive to the new technologies emerging, in particular in the roadbuilding field, by adapting our machines to new needs. We are closely following the innovation activities of manufacturers and we are also putting a lot of work in on the digital transformation of our profession. For us, INTERMAT is the technical accomplishment of our equipment expertise and the only privileged venue for equipment and specialised techniques. We are expecting to get a lot out of the show in terms of relationships and the winning convergence of technical experts, equipment professionals and manufacturers to optimise our market in the coming years. [...]"

FROM SEPTEMBER TO JANUARY, ESSENTIAL MEETINGS AHEAD OF INTERMAT PARIS

INTERMAT Paris is organising **exclusive events** between September and January dedicated to three critical issues for construction market players; innovations, the projects of tomorrow and regional development.

An eight-month run up **featuring a wide range of valuable highlights to initiate and develop synergies and experience sharing ahead of the event between industry players, allowing exhibitors and visitors alike to prepare their 2018 edition.**



INTERMAT PARIS GOES GLOBAL

By creating **INTERMAT ASEAN**, in partnership with the Thai exhibition organiser **IMPACT** and the Thai Contractors' Association **TCA**, INTERMAT aims to support all the economic actors in the construction of effective and sustainable infrastructure in this part of the world.

With the acquisition in September 2017 of **CONCRETE ASIA**, a fast-growing international show dedicated to the construction and concrete sectors in Asia, Comexpo has reinforced the range on offer at INTERMAT ASEAN.

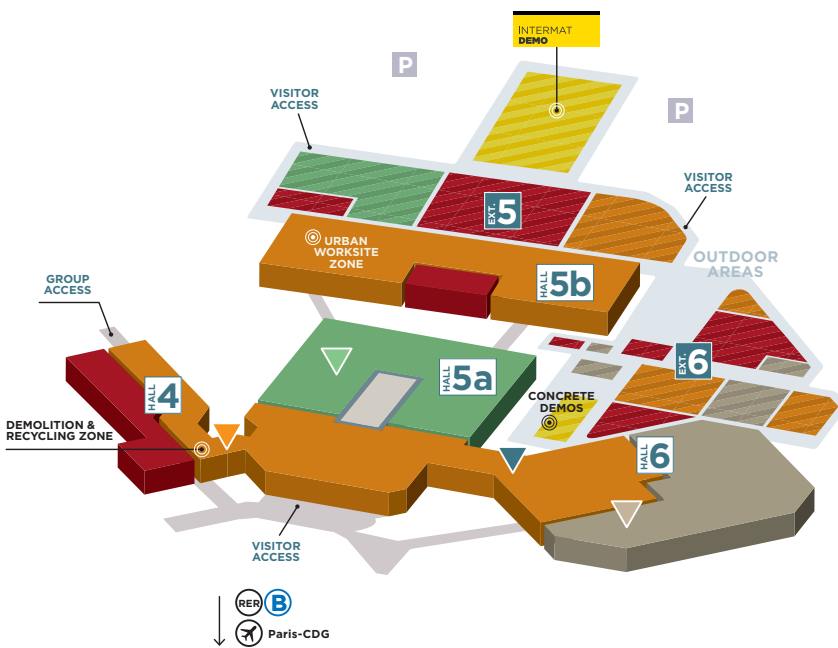
From 6 to 8 September 2018, the two exhibitions **CONCRETE ASIA** and **INTERMAT ASEAN** will be held together, to form the most exhaustive platform for construction, infrastructure and the concrete industry in South East Asia.

More information on page 31.

INTERMAT PARIS: A NEW ORGANISATION ATTUNED TO SUPPLY AND TO THE DEMANDS OF COMPANIES

A NEW PRODUCT OFFERING STRUCTURED INTO 4 HUBS OF EXPERTISE

The wide-ranging diversity of the construction and infrastructure sector has prompted INTERMAT Paris to develop a **new structure** aligned with demand, offering an **optimised visiting experience** and innovations promoted in each specialist area.



Outdoor stands
 Indoor stands
 Outdoor demonstration zones
 P Car parks



INTERMAT
EARTHMOVING
& DEMOLITION

- Machines & equipment for earthmoving and civil engineering
- Machines & equipment for demolition, environment & recycling
- Accessories, components, parts for earthmoving and demolition
- New technologies for earthmoving & demolition
- **DEMOLITION & RECYCLING VILLAGE**



INTERMAT
ROADS,
MINERALS
& FOUNDATIONS

- Equipment & materials for road infrastructure /maintenance
- Machines and equipment for minerals industries
- Drilling, boring, special foundations, trenching machines
- Topography, new technologies, engineering, automatic systems
- Accessories & components for roads, minerals and foundations
- **SMART ROAD VILLAGE**



INTERMAT
LIFTING,
HANDLING &
TRANSPORTATION

- Materials handling and lifting equipment and machinery
- Vehicles & equipment for materials transportation
- Vehicles for passenger transportation (LCV)
- Accessories, components, parts for lifting & transportation
- New technologies for lifting, handling & transportation
- **START-UPS VILLAGE BY EUROVIA**



INTERMAT
BUILDINGS
& CONCRETE
SECTOR



**WORLD OF
CONCRETE**
EUROPE

CONCRETE SECTOR

- Concrete industry, other equipment and machinery
- Facilities and machinery for concrete production
- Facilities and machinery for pre-cast concrete
- Materials for concrete
- Equipment and machinery for special and decorative concrete
- Equipment, delivery and laying of ready-mixed concrete
- New technology, services and engineering for concrete

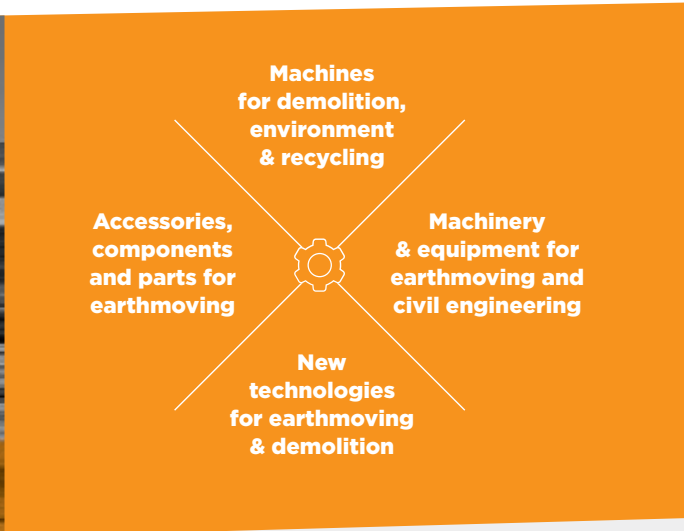
BUILDINGS

- Accessories, components and parts for building work
- Formwork, scaffolding and shoring
- Site equipment and tooling
- Materials for buildings and construction
- New technology for buildings
- **BUILDING SMART VILLAGE**



EARTHMOVING & DEMOLITION

The Earthmoving and Demolition sector at INTERMAT Paris includes the following equipment and solutions:



MARKET FOCUS

SIZE OF FRENCH MARKET

€ 7.5 Bn

Earthworks in France

€ 10.1 Bn

International sales in roadworks and general earthworks

Source: FNTP - Les Travaux publics - 2015 annual report

GROWTH OUTLOOK

By 2023 the worldwide earthmoving equipment market will be worth

\$192.45 Bn

Source: Global Market Insights

INDUSTRY INDICATORS

Earthworks

21,572⁽¹⁾
contractors in France (2015)

€ 12,216 Bn⁽²⁾
in sales (2013)

Demolition works

1,058⁽¹⁾
contractors in France (2015)

€ 890.6 Bn⁽²⁾
in sales (2013)

(1) Source: INSEE, démographie des entreprises et des établissements 2014 - champ marchand non agricole, stocks d'entreprise au 1^{er} janvier 2014

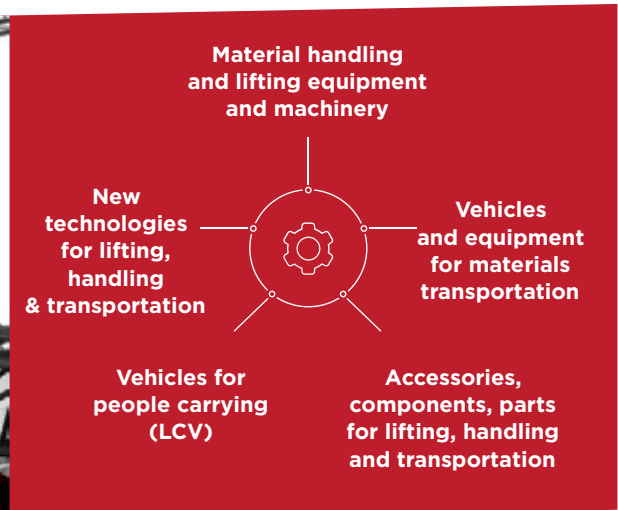
(2) Source: INSEE, ESANE



LIFTING,
HANDLING
& TRANSPORTATION

LIFTING, HANDLING & TRANSPORTATION

The Lifting, Handling & Transportation sector at INTERMAT Paris includes the following equipment and solutions:



MARKET FOCUS

Lifting

FRANCE: A FEW FIGURES



60%
of sales
from construction

450
contractors

10,000
employees

€ 2 Bn
turnover

Source: Union Française du Levage

Handling

FRANCE: KEY FIGURES



OUTPUT OF
HANDLING
CONTRACTORS
in billion euros

2015
€ 3.67 Bn

EXPORTS
in million euros
year-on-year
change

2015 **+3.5%**
€ 2,479 M

IMPORTS
in million euros
year-on-year
change

2015 **+3%**
€ 2,681 M

Source: CISMA - Key figures 2015 - Equipment for construction, infrastructure, steelmaking and materials handling

TRENDS

Marked increase
in investment

+6.5%
in 2016

Telehandler
market

between **+5%**
and **+10%**

Platform
lifts

between **+10%**
and **+15%**

Sales
of forklifts

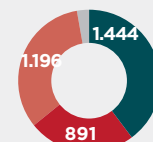
+5%

Source: Handling focus, Le point éco du CISMA, November 2016

HANDLING EQUIPMENT FIRMS

OUTPUT in billion euros

€ 3.7
Bn



2015

+6.4%
(voy)

◆ Forkflit ◆ Industrial lifting ◆ Systems, isolated loads ◆ Storage

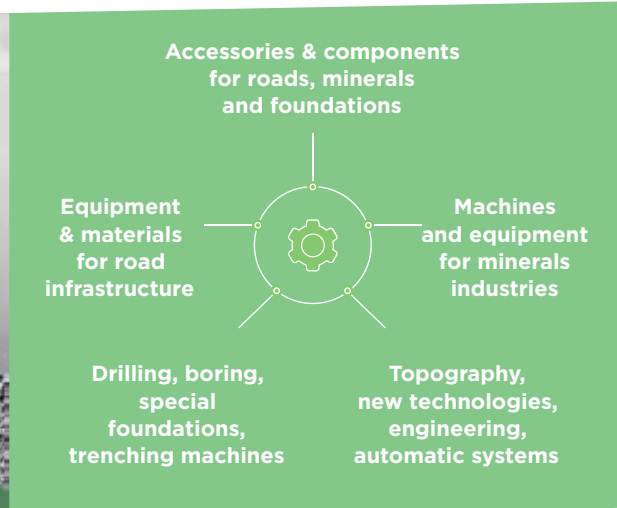
Source: CISMA - 2015 key figures - Les entreprises d'équipements de la manutention



**ROADS,
MINERALS
& FOUNDATIONS**

ROADS, MINERALS & FOUNDATIONS

The Roads, Minerals & Foundations sector at INTERMAT Paris includes the following equipment and solutions:



MARKET FOCUS

MARKET SIZE

For materials industry



IN EUROPE, the scale of the aggregates industry

€ 15 Bn
sales in 2014

250,000
employees

€ 2.6 Bn
tonnes / year

The largest non-energy
extractive industry

15,000
firms

25,000
sites (quarries
and pits)



IN FRANCE

2,300
quarries

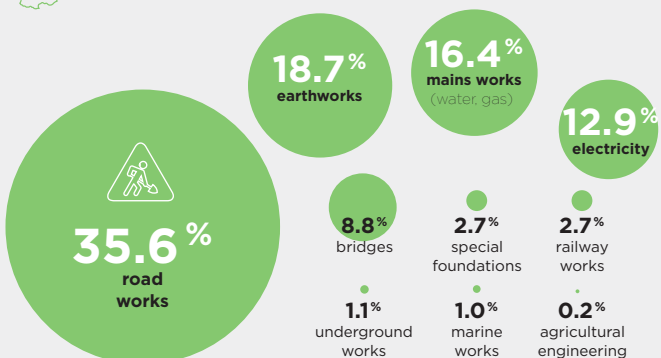
(1) Source: UEPG (European Aggregates association)

Source: UNICEM - French quarry and construction materials industry association

For roads



IN FRANCE, road works as a proportion of public works



Source: FTNP 2013

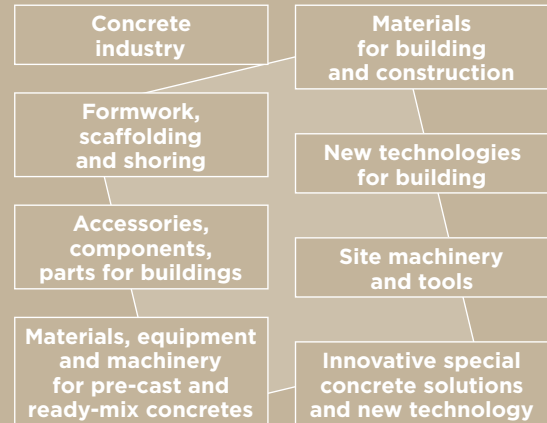
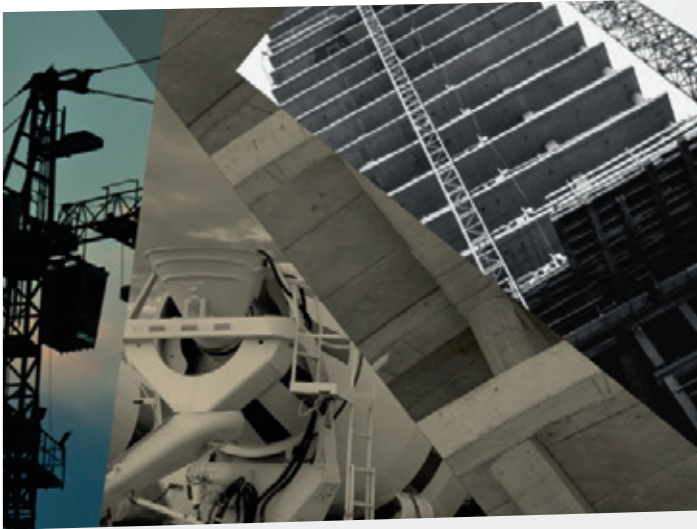


TURNOVER

€12
Bn
FRANCE

Source: USIRF 2015

€8.24
Bn
OUTSIDE FRANCE



MARKET FOCUS

Building

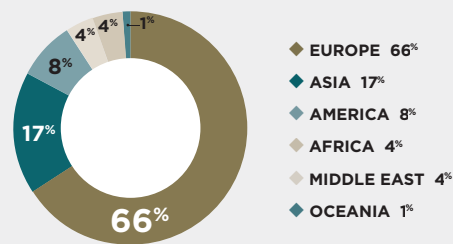
FRANCE IN 2015

401,100
contractors
1,431,300
workers, including:
1,051,000 employees
380,300 tradesmen
€124 Bn excl.VAT
of building works, of which:
€50 Bn in new build
€74 Bn in repairs
and maintenance

Source: estimations by FFB, FNTP - June 2016
Data for 2014

French Business on Foreign Markets

Breakdown by geographical zone



Source: estimations by FFB, FNTP - June 2016 - Data for 2014

EUROPE

3 million contractors
42.3 million employees
Total production in Europe:
€1,211 Bn of building works
European business
on foreign markets:
€93.5 Bn of sales

Sources: EU 28, FIEC figures

Concrete

FRANCE

800
production sites
€2.5 Bn in sales
21M tonnes
of concrete goods
20,000
direct jobs

Source: French concrete industry
federation (FIB)

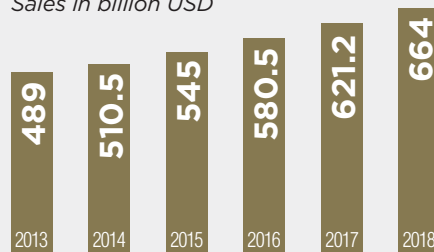
EUROPE

8,000
production sites
€35 Bn in sales
200,000
employees

Source: FIB publication "Construire
pour un cadre de vie durable"

WORLD

Continuous increase in worldwide demand
for concrete and cement
Sales in billion USD



Source: Survey by SVP and Timetric, October 2014

TRENDS

Continued growth
of worldwide cement
and concrete
production up to 2018

\$1,104 Bn
of concrete produced
in the world in 2016

Source: Survey by SVP
and Timetric, October 2014



RENTAL & DISTRIBUTION

The Rental & Distribution sector at INTERMAT Paris includes the following equipment and solutions:



- Grinders / Crushers
- Construction site trucks / dumpers
- Variable-reach trucks / powered access
- Formwork, scaffolding, shoring
- Compressors, generators and pumps
- Modular constructions
- Materials handling equipment, winches, hoists
- Hand-held electric tools
- Compact excavators and dumpers
- Finishing tools and equipment
- Diamond tools
- Wheeled hydraulic excavators and loaders

MARKET FOCUS

FRANCE

A few figures

In 2016, the profession represents nearly:

2,600 firms | **4,700** sites | **43,300** employees | **€11,9** Bn turnover

€ 298 million net profit

2016 DATA

Activity	Companies	Sites	Turnover €M	Workforce	Net profit (€ million)
Distribution of building & public works equipment	1,095	1,610	5.4 +23%*	12,743 -2%*	92
Rental of building & public works equipment	1,493	3,059	3.76 +2%*	23,400 +3%*	123
Distribution / rental of handling equipment			1.93 +8%*	7.120 +5%*	83
Total	2,588	4,669	11.09	43,263	298

*Change on year N-1

Source: DLR - Estimations by ASTERES, "Bilan, Distribution, Location, Manutention" 2016 (published in March 2017)

Distribution of building & public works equipment

New equipment sales: **+38%**
Used equipment sales: **+15%**

Rental of building & public works equipment

Total equipment fleet value **€ 6.9 Bn** in 2016
+9% compared with 2015

Distribution of Handling equipment

New equipment sales: **+14%** in 2016 (versus 5% in 2015)
Used equipment sales: **+12%** in 2016 (versus 5% in 2015)

Average fleet age: 54 months (down 10 months vs. 2015)

Trends / economic outlook

TURNOVER IN Q3 2016

Year change compared with Q3 2015

Distribution
+ 3%

Rental
+ 7%

Handling
+ 11%

Source: DLR - Estimations by ASTERES, Baromètre conjoncturel 3^e Trimestre 2016 location, distribution de matériel de BTP et de manutention industrielle

TURNOVER OF EQUIPMENT RENTAL SECTOR IN FRANCE

3,627 million euros in 2016

Growth of **1.1%** forecast in 2017

Source: ERA Market Report 2016

EUROPE

Key figures

Average growth of European equipment rental industry

in 2015
2.0%*

Estimation for 2016
2.8%*

Estimation for 2017
1.9%*

*for the 15 countries studied by ERA as part of the ERA Market Report 2016
Source: ERA Market Report 2016

RENTAL AND DISTRIBUTION COMPANIES VISIT INTERMAT PARIS: ⁽¹⁾

ACCES INDUSTRIE • AEB • BINET LOCATION • CFE LOCATION • FRANCE TP • GH S.A • HERTZ EQUIPEMENT • KILOUTOU • KINTETSU INTERNATIONAL • LAVENDON • LELIEUR LEVAGE • LHEUREUX LOCATION • LOCATOUAM • LOCHIAM • LOXAM • MEDIACO • NIKKEN CORPORATION • SALT • SARL MAES FLANDRES TP • SARL MEULOT DANY • SARL POTEAU • SCOPEHM • SERMA BTP • SOFIMA • SOGEMAL • SOLOMAT LOCATION • TP SERVICES VENDEE LOCATION



INTERMAT RENTAL DAY

A day dedicated to the rental sector

Thursday 26 April 2018

In this conducive environment, INTERMAT Paris is also dedicating a special day to the rental sector, **INTERMAT RENTAL DAY**, featuring:

> an exclusive round table on the theme "**Equipment Rental in 10 years**", addressing the market's growth perspectives.

Organised on the morning of Thursday 26 April 2018 from 10.30am to 12.30pm, this event will comprise:

- an examination of the construction sector landscape and the organisation of rental, drawing on examples from different countries.
- an overview of construction sector change-related issues affecting equipment rental in these countries.
- the major factors that will drive change in the rental business over the next 10 years, and how each country is preparing for it.

> followed in the afternoon by **Individual business meetings between exhibitors and rental firms.**

In partnership with



THEME VILLAGES: INNOVATION AND NEW TECHNOLOGY UNDER THE SPOTLIGHT

With the aim of addressing the challenges raised by the digitalisation of the building and public works industry, and to propose a wider range of solutions, **INTERMAT Paris has chosen to shine a spotlight on new technologies developed by companies.**

For the very first time, start-ups, SMEs and larger firms will present their new solutions and products on four dedicated spaces: the Start Up Village by EUROVIA, the Smart Road Village, the Building Smart Village and the Demolition & Recycling Village.

A series of talks and round tables on the market's topical subjects will also be on the agenda of each theme zone to encourage exchange and sharing between professionals.

<p>Start up Village by EUROVIA*</p> <p>With start-ups offering selected innovative products and solutions. In association with the Impulse Labs incubator</p>	<p>The Smart Road Village</p> <p>With firms from the smart roads sector:</p> <ul style="list-style-type: none"> • Data transmission stations, • Detectors, • Energy, • Engineering, • Intelligent transport systems and services, • New technology for road infrastructure, • Sensors
<p>The Building Smart Village,</p> <p>With firms from the Building Smart and BIM sectors:</p> <ul style="list-style-type: none"> • Automatic operation of earthmoving machines • Automation and robotic technology • BIM Cabin • Building data management systems • Digital design and robotic manufacturing • Digital tools on the worksite • Earthmoving monitoring using airborne 3D surveys 	<p>The Demolition & Recycling Village</p> <p>With firms working in demolition and recycling. With firms from the sector:</p> <ul style="list-style-type: none"> • Recycling • Waste management • Safety • Dust suppression <p>In partnership with the French National Demolition Contractors association, SNED.</p>



* Eurovia is the partner of the Start-up Village at INTERMAT Paris and places innovation at the heart of everything it does. As a local partner, Eurovia, a subsidiary of VINCI, develops mobility solutions to enhance economic competitiveness and strengthen social bonds by designing, building and maintaining transport infrastructure and fostering urban development.

Committed to innovation for the past several years, Eurovia leads an active community around its business lines (materials, industry, works and services), its audiences (customers, residents, employees) and its development priorities around the mobility of the future and green growth. Eurovia has thus decided to become a partner of INTERMAT Paris, the international trade show for construction and infrastructure, to support the entrepreneurial and innovative spirit of start-ups, in particular in the area of public works and site machinery. Every day, Eurovia puts people and communities in motion. Designing, building, and maintaining roads, metros, tramways, high-speed rail lines, bicycle paths, streets, public spaces all over the world and useful for everybody... this is how we give everyone the best means to move forward. By making transport infrastructure safer and smarter. By making mobility solutions accessible to everyone. By preserving spaces and our environment more effectively. By saving resources. By enhancing the quality of life. By contributing to the vitality and consistent development of communities and regions. We move forward to enable you to move forward.

www.eurovia.com



INTERMAT
DEMO

INTERMAT DEMO: A UNIQUE DEMONSTRATION ZONE

INTERMAT Paris is the only international trade show to offer an outdoor zone dedicated to demonstrations, where manufacturers can show their machines in action.

The art of staging the performances of worksite machinery!

Building and public works professionals will be able to discover the know-how of manufacturers and the progress made by equipment towards greater safety, productivity, etc. These dynamic demonstrations in particular enable equipment and machine performances to be highlighted in real-life conditions.

On the agenda, a great many demonstrations of site machines:

- **backhoe loaders,**
- **compact excavators,**
- **loaders,**
- **levellers,**
- **screening machinery,**
- **crushers,**
- **demolition machinery and equipment, etc.**





WORLD CONCRETE EUROPE (WOC EUROPE): AN EVENT WITHIN THE EVENT

WORLD OF CONCRETE EUROPE, launched in 2015 in association with INFORMA EXHIBITIONS, will be back again in 2018, combining an exhibition, an educational programme and a demonstration zone. Under the banner "Connecting the Concrete Industry", it aims to cater to all the expectations of the European concrete market, offering it powerful resonance and visibility to create strong connections between the sector and its stakeholders.

Our society today is undergoing profound change: with population shift, climate change and urban development, there are a great many complex challenges to be tackled simultaneously.

These new issues have become absolute priorities for professionals in the construction sector. The concrete sector, a consistent supporter of the development of our society, plays a major role in urban and regional development (buildings, visible and invisible infrastructure, highways) whilst fitting in seamlessly with the scheme of the circular economy essential for relocating added value in regions, on the doorstep of resources, skills and requirements.

An exhaustive spectrum of the latest advances in the European concrete market

As the only European event dedicated to concrete and aimed at the construction and infrastructure community, it will be the point of convergence for the sector's leaders, offering visitors **an exhaustive view and an expert vision of the latest innovations, trends and technological, digital, aesthetic and environmental developments in the field of technologies, applications, equipment, etc.**

All of the key figures from the European concrete sector will be in attendance to constitute **a unique platform for concrete, meet and exchange with all the actors in the profession, support an attractive and fast-evolving sector and be the ambassadors for the image of a universal, innovative, multi-purpose and multi-dimensional material.**

The conjunction of an exhibition space, an educational forum and a demonstration zone will enable visitors **to discover the exhaustive offering present on the concrete market, from the upstream phases (materials, products and additives) to downstream (decorative concretes, coverings and coatings, engineering and services).**

The Buildings and Concrete Sector expertise hub will present the following equipment and solutions:

World of Concrete Europe is a unique event offering the opportunity to meet all European players in the Concrete and Buildings Sector.



CONCRETE SECTOR

- Concrete industry, other equipment and machinery
- Facilities and machinery for concrete production
- Facilities and machinery for pre-cast concrete
- Materials for concrete
- Equipment and machinery for special and decorative concrete
- Equipment, delivery and laying of ready-mixed concrete
- New technology, services and engineering for concrete

BUILDINGS

- Accessories, components and parts for building work
- Formwork, scaffolding and shoring
- Site equipment and tooling
- Materials for buildings and construction
- New technology for buildings

An educational forum addressing "The contribution of concrete to new collective challenges"

Emphasis will be placed on a **programme of approximately fifteen lectures and practical workshops**, designed with market players from the European concrete sector and delivered by expert speakers from construction and public works, etc., members of federations and representatives of the largest European firms in the sector.

The programme will help to provide answers to the challenges of the industry (life cycle, concrete recycling and circular economy, focus on concrete fundamentals, integration of concrete solutions in BIM processes, durability, maintenance, repairs, etc.) across six main themes:

1. Concrete sector: circular economy and contribution to local development
2. Low carbon construction and climate change prevention through concrete solutions
3. Innovation fostering performance with the concrete sector
4. Concrete aspects and textures: how aesthetics can benefit a region's wellbeing and planning
5. Concrete maintenance and repair for ever-increasing durability
6. Connected concretes

A "Concrete Demos" space hosting nonstop demonstrations

The "Concrete Demos" space will accommodate special events happening nonstop dedicated to concrete product applications, in particular decorative, polished, bush hammered, printed concretes, etc. These features will also highlight the methods of layers and the demonstrations of tools and equipment used by experts in the concrete sector.

To prepare this event, World of Concrete Europe brings together a steering committee every three months made up of experts from the Concrete Sector:

Members of the WOCE Steering Committee:

Julien **BEIDELER**,
Secretary General, UMGO⁽¹⁾

Frédéric **GLUCZIKI**,
Editor in chief, Béton[S] le Magazine

Christophe **JEAUNEAU**,
Chief Executive, MAPEI

Frédéric **LJUNG**,
Market Director, Decorative Concrete, CHRYSO

Pascal **PETIT-JEAN**,
Secretary General, SEIMAT⁽²⁾

Estelle **REVEILLARD**,
Head of Communications
and Public Relations, CIMBETON

Vincent **SIMON**,
Deputy Secretary General, UMGO

Anouk **THEBAULT**,
Director of Professional Relations, CERIB⁽³⁾

(1) French Stonework and Structural Works Union

(2) French Association of International Civil Engineering, Mining,
Construction and Hoisting Equipment Industries

(3) Concrete Industry Design and Research Centre



INNOVATIVE BUSINESS DEVELOPMENT TOOLS AND SERVICES

To support exhibitors and visitors in preparing their show, INTERMAT Paris has introduced ready-to-use tools and services:

- **A free-to-use matchmaking service** for business introductions between exhibitors and visitors using a dedicated platform on which visitors provide details of their needs and exhibitors present their products and target countries.
- **A Hosted Buyer Programme**, together with a series of networking events organised during the show: **top buyer guests, sponsors of projects and investments**, will be invited expenses-paid by the organisers of INTERMAT. They will be offered visiting roadmaps and schedules of appointments with exhibitors on their stands, to make their trip effortless and efficient.



ESSENTIAL EVENTS ORGANISED PRIOR TO THE SHOW, PROMOTING...

... MAJOR PROJECTS OF THE FUTURE, WITH THE INTERMAT CONSTRUCTION OBSERVATORY

For the first time, INTERMAT Paris, in association with Business France, launches the **INTERMAT Construction Observatory**.

The construction and infrastructure sector is a key contributing factor to the development of regions and their appeal. In view of the profound economic, social and environmental changes currently happening, INTERMAT accompanies industry players in this transformation with new high added value tools and content.

The **INTERMAT Construction Observatory** came about as a result of the desire to establish stronger bonds with the market and provide exhibitors and visitors with a prospective study looking towards 2025-2030. Conducted in 12 countries in the EMEA zone, handpicked for their planned investment levels in infrastructure and buildings, the Observatory's aims are to:

- Provide in-depth knowledge of the industry in targeted countries,
- Identify high potential markets,
- Activate synergies between our exhibitors and foreign decision makers.

For each country studied, a **quantitative and qualitative analysis** was conducted using national key indicators (geographic and commercial data, macroeconomic indicators, short and medium-term economic growth) and industry key indicators (top 3 main machines and tools imported and exported, top 3 main machine and tool exporting countries).

The INTERMAT Construction Observatory targets 12 countries in the EMEA zone:

6 countries in Europe

- Belgium
- France
- Germany
- Italy
- Netherlands
- United Kingdom



4 countries in Africa:

- Algeria
- Ivory Coast
- Kenya
- Morocco



2 countries in the Middle East:

- United Arab Emirates
- Qatar



In accordance with the new exhibition organisation, the INTERMAT Construction Observatory studies the market of 7 sectors of activity: airport infrastructure, port infrastructure, roads, railways, bridges & tunnels, mining and quarries, residential buildings and functional buildings.

The findings will be exclusively revealed on 30 November 2017 at a press conference in Paris.



AN OBSERVATORY PARTNERSHIP WITH BUSINESS FRANCE

Business France is the national agency supporting the international development of the French economy. It is responsible for fostering export growth by French businesses, as well as promoting and facilitating international investment in France. It promotes France's companies, business image and nationwide attractiveness as an investment location, and also runs the VIE international internship program.

... INNOVATION



PRE-INTERMAT, TWO DAYS OF EXCLUSIVE MEETINGS WITH EXHIBITORS

18-19 January 2018
Maison de la Mutualité - Paris

■ **150** journalists expected

■ **100** exhibitors

■ A gala dinner

■ The winners of the **INTERMAT Innovation Awards** announced exclusively

“A special occasion where we can make the most of meeting journalists and the news we want to tell them”

Martine Mercier,
Communications Director, MECALAC (France)

“One of the best possible investments!”

Leigh Sparrow,
Editor-in-chief,
VERTIKAL VERLAG (Germany)

Pre-INTERMAT takes place over two exclusive days three months before the show, bringing together the international construction trade and business press. This is a unique opportunity for companies and journalists to meet up face-to-face in a private setting.

At **Pre-INTERMAT**, market leaders and all other players who contribute to the sector's vitality can present their new ranges and products to the international media and exclusively unveil their latest news.



Chaired by:

INTERMAT INNOVATION AWARDS

Awards ceremony on 18 January 2018 at the Maison de la Mutualité

The **INTERMAT Innovation Awards**, chaired by Bruno Cavagné (FNTP), aim to pay tribute to the latest equipment, technology, services and products in construction and infrastructure through twelve awards.

Through their innovations, candidates will improve equipment performance and user safety in a perspective of optimising productivity whilst being environmentally responsible. These innovations will compete in the various categories reflecting the four hubs of expertise at the show: Earthmoving & Demolition, Roads, Minerals & Foundations, Lifting, Handling & Transportation and Buildings & Concrete Sector.

The judging panel made up of European specialists from research and the construction industry will award the prizes for "**Equipment and Machinery**" and "**Components and Accessories**" in the four sectors at INTERMAT Paris, and four additional exclusive awards: "**Digital Transition**", "**Energy Transition**", "**World of Concrete Europe**" and "**Start-Up by EUROVIA**".

To be selected, entries will be judged on **five specific criteria**:

- **Cost efficiency:** lower investment and maintenance costs, easier maintenance, improvement of production system and enhanced use of products or techniques,
- **Technical design and technologies used:** improvement of performance and productivity, ease of maintenance,
- **Operation:** work quality, productivity improvements, ease of maintenance and energy efficiency,
- **Use:** ease of use, user-friendly, comfortable, safe and improved working conditions and risk prevention
- **Environmental protection:** protection of the climate and biodiversity, to promote the circular economy

The results will be officially announced three months before the show at **Pre-INTERMAT, on 18 January 2018** at an awards ceremony, held at the **Maison de la Mutualité, Paris**.

MEMBERS OF THE 2018 INTERMAT INNOVATION AWARDS JUDGING PANEL




Chairman of the Judging Panel

Bruno CAVAGNE
President of FNTP⁽¹⁾
France





Panel Member

Didier THEVENARD
Equipment Director
EUROVIA
France





Panel Member

Kjetil TONNING
Vice President of FIEC⁽²⁾
Norway





Panel Member

Koen COPPENHOLLE
Chief Executive
CEMBUREAU
Belgium





Panel Member

Bernard HERITIER
Publishing Director
RGRA
France





Panel Member

Pascal BEECKMANS
Director Procurement
& Logistics
BESIX
Belgium





Panel Member

Pascal LEMOINE
Technical and Research
Director
FNTP
France





Panel Member

Pierre BOELS
President – ERA
Netherlands





Panel Member

Thierry LAHUPPE
Equipment Director
LOXAM
France





Panel Member

Thomas LE DIOURON
Founder
IMPULSE PARTNER
France





Panel Member

Vincent SIMON
Assistant General Secretary
UMGO-FFB
France




- (1) National Federation of Public Works
(2) European Construction Industry Federation
(3) European Rental Association

Panel as at 29/09/2017

... REGIONS

This year, for the first time, INTERMAT Paris takes to the road to meet all of the industry's players by holding meetings **between September and December 2017** in French regions and abroad.

Each round table will be an opportunity to identify development potential by examining local indicators and key data in the building and public works sector, but also a chance to discuss the major construction projects planned up to 2025 and gauge their impact on the economic and social environment. Trade bodies, public sector decision makers and companies will meet up to discuss the challenges, growth perspectives and dynamism of each major market.

■ INTERMAT meetings in France

From 5 October to 5 December 2017, in association with the regional public works and building federations.



■ International INTERMAT meetings

From 20 September to 13 December 2017





INTERMAT ASEAN

Intermat develops its footprint in Asia with INTERMAT ASEAN and CONCRETE ASIA

Comexposium acquired **CONCRETE ASIA** in September 2017 from Globe International Events Consultancy Pte Ltd.

CONCRETE ASIA is a fast-growing international trade show dedicated to the construction and concrete sector in the Asia region which is currently organised in Bangkok, Thailand. Comexposium will jointly organise the event with IMPACT Exhibition Management Co., Ltd. ("IMPACT"), the largest exhibition and convention centre in Thailand. CONCRETE ASIA is the fourth exhibition on which IMPACT and Comexposium will be working together.

In June 2017, Comexposium jointly organised a successful debut edition of **INTERMAT ASEAN** in Bangkok as an extension of INTERMAT Paris, the leading trade show for construction and infrastructure, to provide an answer to the growing requirements of construction in South East Asia. The Thai Contractors Association is one of the major supporters of INTERMAT ASEAN. The acquisition of CONCRETE ASIA extends the footprint of Comexposium and its service offer on the South East Asian construction market.

From 6 to 8 September 2018, the two exhibitions, CONCRETE ASIA and INTERMAT ASEAN will be co-located, forming the most exhaustive platform for construction, infrastructure and the concrete industry in South East Asia.

Isabelle Alfano, Director of the Construction Business Unit at Comexposium and Director of INTERMAT, commented: "We are confident that holding CONCRETE ASIA and INTERMAT ASEAN at the same dates in 2018 will help to optimise synergies and will provide genuine added value for local buyers and visitors to the event. My team and I are very proud, through our work, to contribute to meeting our target customers' commercial objectives."

  ASEAN.INTERMATCONSTRUCTION.COM

COMEXPOSIUM



IMPACT
MUANG THONG THANI



Lined writing area consisting of 25 horizontal lines.

CONTACTS INTERMAT PARIS - WOC EUROPE



Isabelle ALFANO
Director, Construction
Business Unit
INTERMAT Exhibition Director
+33 1 76 77 11 07
isabelle.alfano@comexposium.com



Laura SANCHEZ
Communications Director

+33 1 76 77 16 30
laura.sanchez@comexposium.com



Lorena RONDI
Communications Officer

+33 1 76 77 13 57
lorena.rondi@comexposium.com

PRESS CONTACTS



AGENCE RUMEUR PUBLIQUE
intermat@rumeurpublique.fr
Chloé Méhat: 01 55 74 52 35 / 07 77 14 61 85
Lucie Daudigny: 01 82 28 37 27 / 06 77 20 71 11
Claire Ciangura: 01 55 74 52 12 / 06 23 14 68 72

PARIS.INTERMATCONSTRUCTION.COM



SE INTERMAT

70 avenue du Général de Gaulle
92058 Paris La Défense Cedex - France
E-mail: communication@intermatconstruction.com