

Markets for Sun Protection in Europe



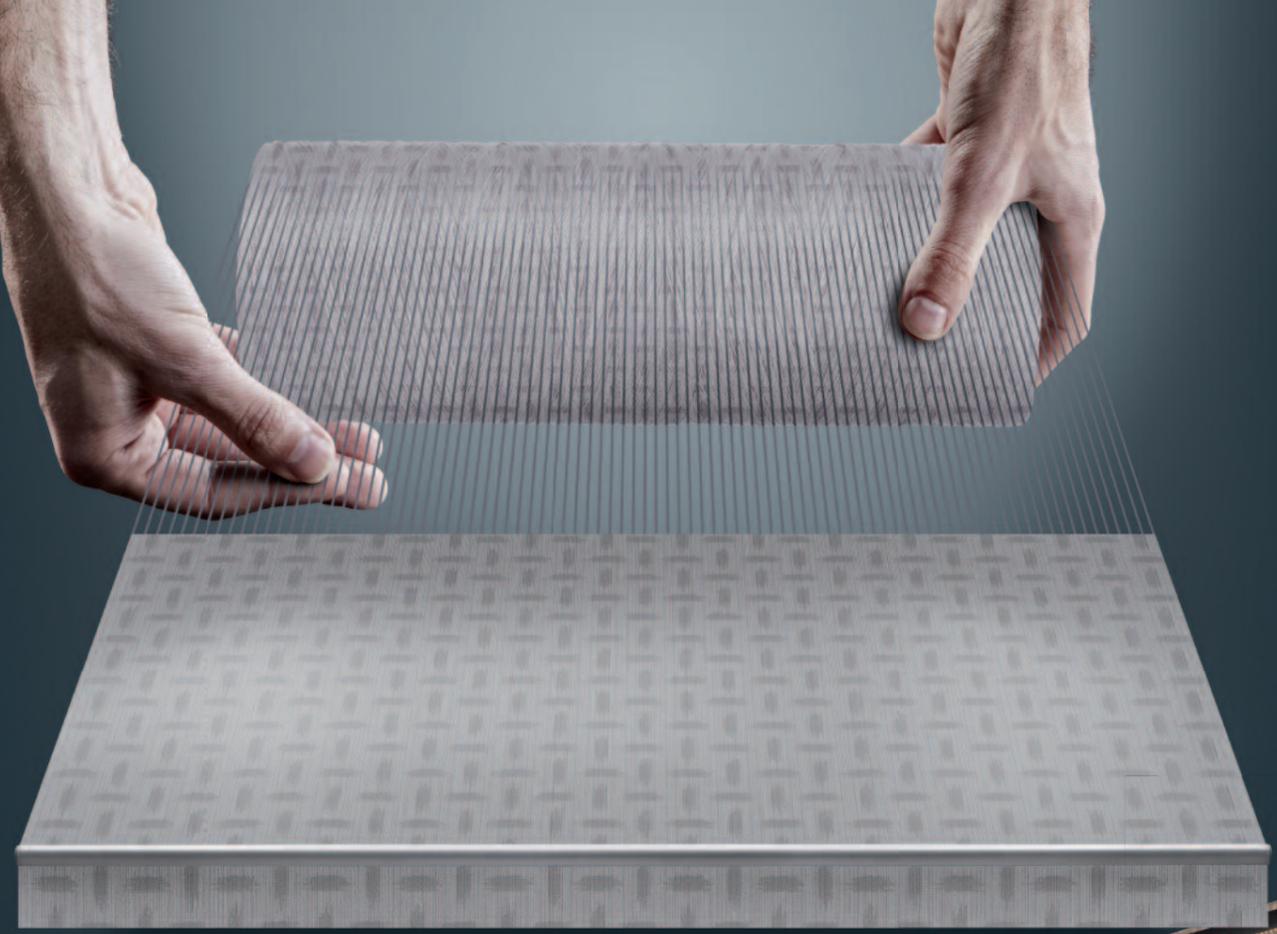
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27.2. - 3.3.2018
Messe Stuttgart

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Dear reader,

France is not only the home of Somfy, the global market leader in control systems, but also the largest country on the continent of Europe, which is currently, for many providers from Germany in this sector who are located near the border, the most important non-domestic sales region. The President, Emmanuel Macron, has been adding to political hopes of economic prosperity on the part of all those closely linked partners on either side of the Rhine; my colleague Frédéric Taddei, Publication Director for the branch of "Verre & Protections", which is appearing in Paris, has analysed the French market for this English language R+T special and compiled the core data on current assistance measures, e.g. in the area of energetic renovation; a building industry observer with tax incentives in the country under François Hollande don't need to expect a paradigm change under his successor, as per Macron's "strengthening the offer" programme.

So, what about Spain? Fortunately, the answer to this question has become more nuanced than was the case when the housing crisis killed off half the market in one fell swoop. José Luis Paris is the editor-in-chief of the ciberperfil.com site. He does not leave any room for doubt in his piece as to the sun-drenched region in his home country being an equally attractive market for the sought-after pergola constructions as well as for internal shading systems, which only then, for example, make office workplaces effectively useful under the climatic conditions. At the same time, the specialist journalist hopes that implementing the EU building directive intended for the end of the decade – catch phrase: nearly zero energy buildings – will lead to increased demands on the part of the planners for products in the industry. In Italy, considering the weather data from one of the core markets for roller shutters, venetian blinds & co., this number of representative projects, especially in the north of the country around the centres of Turin and Milan, having picked up again following a low a few years ago, the upwards trend was confirmed in a discussion with *sicht+sonnenschutz*, by Simone Mazzon, CEO of KE Protezioni Solari – specialists can see reasons for amazing outdoor living constructions and, in particular, for marketing and perception by moving away from pure functionality and towards a more emotionally effective lifestyle character for the shading systems.

What is covered with our impressions on the development in Germany, since "Outside is the new inside", was formulated by the Stuttgart Trade Fair speaker, Astrid Ehm, at the kick-off meeting for R+T markets: This means that it is not only the 2018 exhibition space first presented at the R+T that served as a teaser; but this could also be the claim for the industry's future prospects. From 27th February to 3rd March, the world of solar protection will be meeting in Stuttgart, in one of Europe's most modern exhibition areas; we felt this was the right occasion to look outside the box along with friendly specialist publishers from other countries in order to identify changes in important markets as well as the chances that could come from dialogue. I hope you enjoy this first edition of R+T markets.



Your faithfully,
Reinhold Kober
Editor-in-chief of *sicht+sonnenschutz*



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Stuttgart: The best infrastructure, with great opportunities



Key to Markets Messe Stuttgart

Landesmesse Stuttgart GmbH · Messepiazza 1 · 70629 Stuttgart (Germany)

Site overview

- Information
- Press
- Kindergarten
- Electronic cash
- VIP Lounge
- Restaurant, café, bistro
- WC
- First aid
- Coin-operated telephone
- Smoking area
- Forum of churches
- Quiet room
- Snack & Shop
- Service center, business center
- Pharmacy at the airport
- Bus stop
- EnBW charging stations for electric vehicles
- car2go parking spaces
- Suburban train station S2, S3
- Car park
- Multi-storey car park
- Underground garage
- RV parking

Stuttgart Airport

R+T MARKETS REVEALS HOW TO GET FAST AND EASY ACCESS TO THE STUTTGART TRADE FAIR CENTRE AND GIVES YOU TIPS ON WHAT YOU CAN THEN VISIT IN STUTTGART – BUT BE SURE TO COME TO THE FAIR FIRST!



Step out. Arrival: Situated between the airport and the motorway, the exhibition and congress centre has an incomparable transport location. Direct access to the A8, the B27, the airport and the S-Bahn provide comfortable short routes which take a matter of minutes. The city centre can be reached in about 20 minutes by S-Bahn.

Arrival by public transport: The exhibition centre has excellent connections to the public transport network. You can reach the centre easily by S-Bahn or bus. Also, a number of coaches stop at the Stuttgart Trade Fair Centre.

Arrival by car: The Stuttgart Trade Fair Centre is 13 kilometres away from the city centre directly on the A8 and B27. If you arrive by car, you reach the site directly. Sufficient parking spaces are available.

Arrival by train: The Stuttgart train station is directly connected to 13 European capitals. It is located in the city centre, approximately 13 kilometres from the Trade Fair Centre.

Arrival by plane: The airport is only 200 metres from the Trade Fair Centre and can easily be covered on foot. If you check in to your hotel in the city centre first, take the direct S-Bahn connection to the main train station in Stuttgart on lines S2 or S3. The journey time is 27 minutes.



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And relax... – tips from the R+T-Team

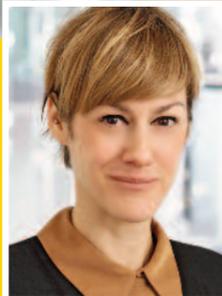


160 vehicles are in the Mercedes-Benz Museum.
Photo: Daimler AG



Sebastian Schmid,
Department Director
Technology

"If you don't have anything planned yet for 1 March 2018, then I have a tip for you! Stuttgart's Cult Disco Boa in Stuttgart city centre holds an after-work party every Thursday from 6 pm. Enjoy cold drinks and cool music after a strenuous day. Fun is guaranteed at the Cult Disco Boa."



Astrid Ehm,
Communication Manager

"Attention, car fans! As a fan of old times, I can only recommend that our visitors plan a little more time for their Stuttgart trip: The Mercedes-Benz Museum is the only museum in the world to present the 125-year history of the automotive industry from the very start, without any gaps. Spread over nine levels with 16,500 square metres of surface area, there are 160 vehicles and a total of more than 1,500 exhibits to see."



Anne-Kathrin Müller, Project Manager

"With a total of 293 rooms and suites in timeless design in the vicinity of Stuttgart's main railway station, Le Meridien is the ideal starting point for a visit to the R+T. The wellness and fitness centre stretches over a total of 850 square metres and invites you to relax and regenerate after a strenuous fair visit."

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The Wilhelma is a zoological-botanical garden in the Stuttgart district of Bad Cannstatt. Photo: Wilhelma



Philipp Götz,
Senior Project Coordinator

"The Ampulle – The Dry Gin & Beef Club – has been a popular meeting place and a unique combination of bar and restaurant for 29 years. In an extraordinary atmosphere, over 170 types of gin are served, such as Monkey 47, Hendrick's Gin, Geranium Gin, Hayman's or Greyling Modern Dry Gin. It is not just the range of gin that makes things interesting. A visit to the restaurant is also worthwhile for meat lovers: Whether Hereford Irish Prime, Nebraska Angus, Rib Eye Dry Age from Pomerania, Tomahawk from Canada or Wagyu Beef – the precious meat is stored in one maturity cabinet and thus obtains a very special taste."



Patricia Grabenbauer,
Project Coordinator

"Away from the Königstraße – the central Stuttgart shopping street – the area around Hans-im-Glück-Brunnen has become a popular nightlife scene hotspot in recent years. Whether breakfast under palm leaves, lunch in the sun or partying until the early hours of the morning, the charming place dazzles with southern flair in summer."



Manuela Keller,
Senior Project Manager

"The Wilhelma is a zoological-botanical garden in the Stuttgart district of Bad Cannstatt. With more than a million visitors, it is one of the most frequently visited zoological gardens in Germany. The Wilhelma shows around 11,500 animals from all over the world on approximately 30 hectares. After the Zoological Garden of Berlin, it is the zoo with the second highest variety of species in Germany, with over 1,200 species. The botanical area presents some 6,000 plant species from all climate zones across the globe. The zoological-botanical garden is in a historical castle building constructed between 1846 and 1866. In the 1960s, the owners began to expand the botanical historical garden with a scientifically oriented zoo."



Ina Fröhlich,
Project Coordinator

"Luxury fashion at affordable prices? In the outlet centre in Metzingen, you will find a number of high fashion brands at low prices for every season and every occasion. In addition to everyday clothing shops, you will also find a wide range of high-quality business fashion or evening wear at attractive outlet prices. Do you want a calm ride to Metzingen? Then take advantage of the direct shopping shuttle. Every Monday, Thursday, Friday and Saturday, you can get the shuttle from Stuttgart to Metzingen and back again. Have fun shopping!"



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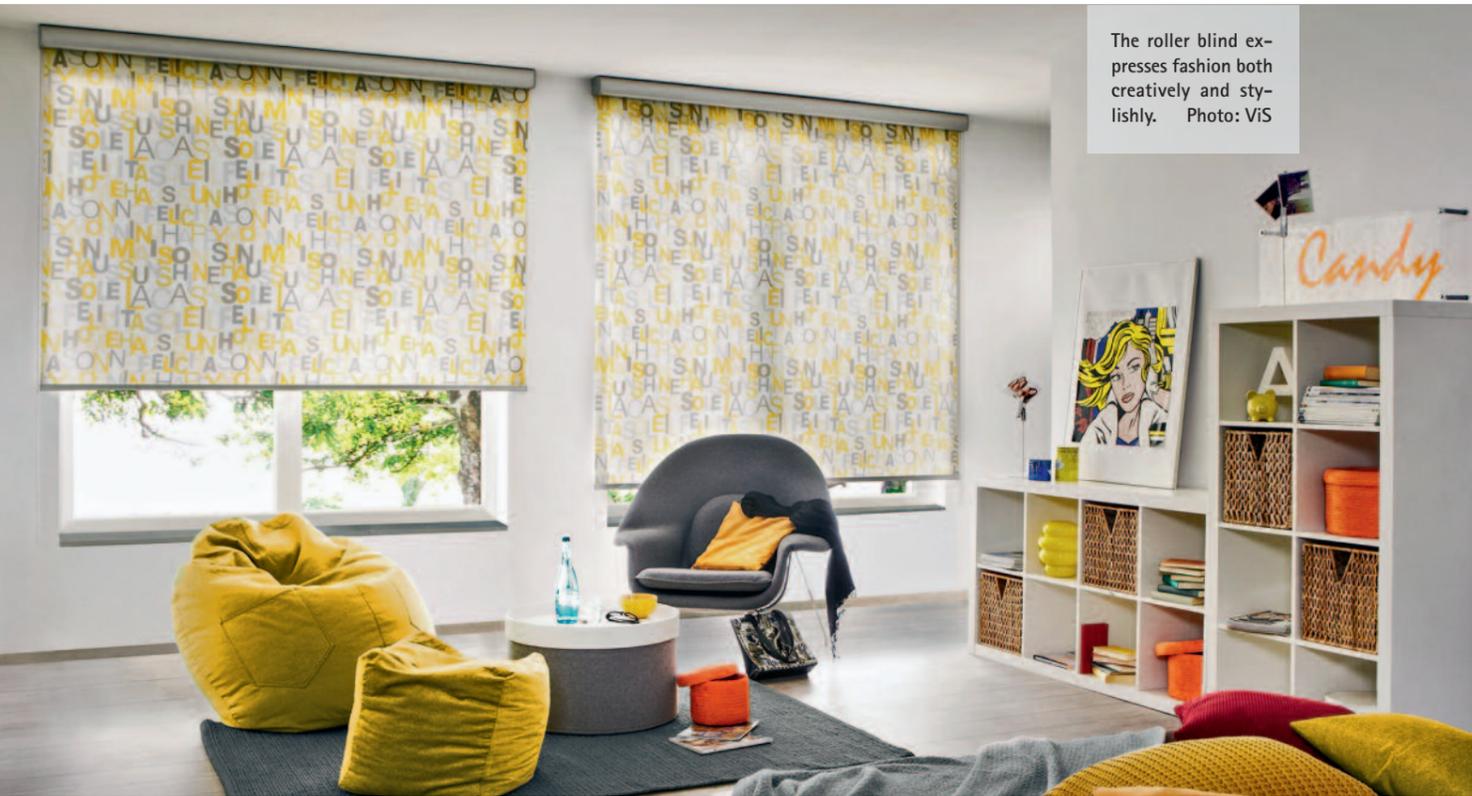
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Made in Germany works – with the correct Manpower

- German market in shortcuts**
- Germany is building, mostly in urban areas and with a higher yield expectation
 - internal sun protection benefits from the marketing performance of a market leader
 - external sun protection provides future potential for screens
 - employer branding places new demands on tradespeople
 - higher value products promise value creation for vital demand
 - clean up product ranges and develop economic advisory models
 - there are 1,800 qualified R+S professionals in Germany – hats off to that!



The roller blind expresses fashion both creatively and stylishly. Photo: ViS



The PergoTex II folding awning by Weiner is available with translucent cloth features; The VertiTEx vertical awning is also on display. Photo: Weiner



The special outdoor blind ProVisio by Warema improves sight lines by 25 percent with constantly changing slat-angles – the customer enjoys a better view to the outside with sight-protection intact. Photo: Warema

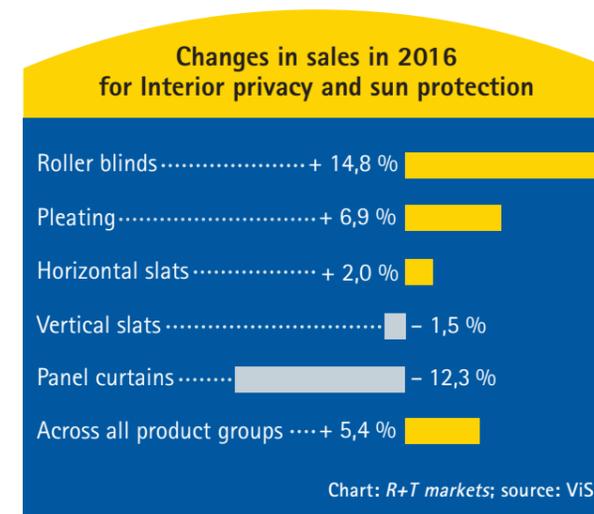
THE SUN PROTECTION MARKET HAS BEEN FAVOURED BY BOTH SOCIAL AND ARCHITECTURAL TRENDS; QUALIFICATIONS AND THE RIGHT PERSONNEL ARE THE SUCCESS FACTORS FOR BENEFITTING FROM THEM – AND THE WILLINGNESS TO PROVIDE SOLUTIONS ALSO FOR LARGER RESIDENTIAL UNITS.

Apart from some exceptions the German sun protection market is still in the hands of professionals. Urban sprawls have been no stranger to the nuisances of janitorial services and a certain high stake ones from amongst the ranks of the manufacturing industry have started to stand out with their online offers, who then turn to hobby assemblers in an unflattering way – but is this the right strategy in high-performance markets such as SmartHome? At this point, when it is most vitally a question of trustworthy customer service as part of a smoothly functioning, comfortable-to-use solution, and image factors in the current market phase, which are all having decisive results, the correct strategy is (hopefully) being decided by professional sales controllers. If you look at how processors and retailers are striving for growth trends such as Outdoor Living, the online sales network and the networked home, you will find companies for who a week

does not go by, for which – product-related or in terms of marketing, management subjects etc. – there would not be at least one employee taking part in advanced training, with a showroom design where the focus is quite naturally on the segments with the most added value, and with a communication strategy, e.g. for pro-actively requested customer feedback, and for correspondingly positive results, as a permanent tool for selling individual products and services via the website. You will also find assembly specialists though, who, with a lean cost structure, are geared towards small orders in the regional restructuring area. In principle, it is possible for both business models to work, as long as there are not any significant changes in the labour market. According to research carried out by the Bundesverband Rollläden + Sonnenschutz (BVRS) in Bonn, every fourth specialist company is already

looking for suitable candidates for roller shutter and sun protection mechatronic professionals; in this instance, market players, which are significantly below the 1,800 specialist firms identified by the association as the leading representa-

tives of the R + S branch (out of almost 4,000 registered overall in the register of artisans), who are focussed (keyword: Employer Branding) on qualitative growth, should have the benefits. Incidentally: The fact that official institutions continue to stand up for the reintroduction of the Master Craftsman's Certificate is praiseworthy; especially regarding the decline in competence among opportunistic providers between Flensburg and Garmisch – even if the trend in the EU quite different, which is clearly based on breaking down barriers to competition and which, in any case, does not spare the craft.



SUN PROTECTION – NOW AVAILABLE IN BEAUTIFUL
The variations in quality have not been freely leased by craftsmen. How many of the large players have referred to repair and restoring work for partially substantial large scale projects, which become necessary, just because the target planner group missed the right moment in the construction sequence, to deal with issues concerning indoor temperature, the glare effect and the best energetically possible combination of a high-performance facade with the shading features that track the position of the sun and daylight functions.



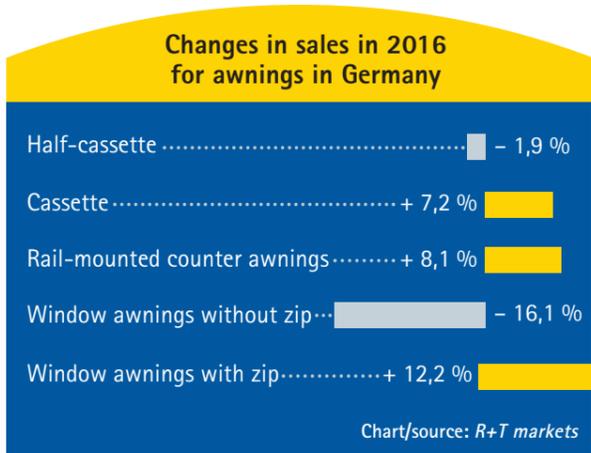
The German sun protection market is served by professionals; In this case the craftsmen from the company Markisen Dittmar assemble an awning. Photo: Heiler

Nowadays, there are hardly any manufacturers that do not have qualified experts at their disposal for supporting architects in answering their questions. Construction keeps going on in Germany, but the balance is shifting: not the generous property on flat land is focussed that much as for many years by roller shutters and sun protection companies, all bar renovation, but in the direction of accessible multi-storey dwellings, in line with current energy standards and at the same time purposefully equipped, architects and contractors usually have to deal with institutionalised investors. This will have an impact on automation in factories, on the need for networks from the industrial suppliers Scheme – planners – craftsmen and possibly also on the range of products or the relationship of prepared / qua-

litatively consultable articles to solutions marketable on a limited scale. At the same time, the architectural demands on industrial products are increasing.

GERMANY – A NATION OF VENETIAN BLINDS?

Currently, and certainly due to the fact that a market leader like Warema has its headquarters here, it is striking, compared to other markets, what a large role venetian blinds play. Example: In France, the market share in screens is much higher. It is possible, in this context, that earlier efforts are once again coming back onto the agenda of using slat-directed daylight for interior design, just as Lichtlabor Bartenbach in Aldrans in Tyrol has gone on to perfection in renowned lighthouse projects all around the world; it is perfectly suited to construction today using glass and would strengthen the position of the facilities that have been created mostly with aluminium in competition with the rigid surface shading. Perhaps it is during the past few years that the most has been done, with the exception of the upswing of the Zip-Screen product group, for internal systems; These have taken a step forward in two ways. Several years ago, the formula was: Glare protection with comfort from inside, energy savings and summer warmth protection from outside. At this point you also cannot help but find a brand in Duette for honeycomb pleats, which has managed to do just that thanks to the efforts of licensor Hunter Douglas; to become a true brand in the B2B world of sun protection, right up to the brand trader, whose consistent support and willingness to negate the aforementioned long-accepted formula: As it is underpinned by research carried out by Fraunhofer, the product, which had



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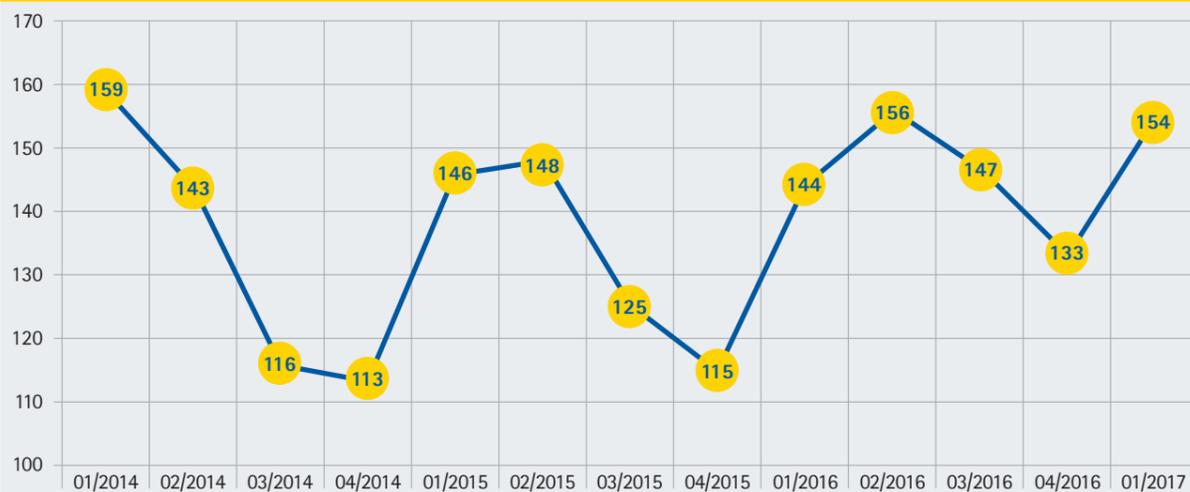
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Trade-related business climate index – companies go for all time high



BVRS, the craftsmen's organisation in the blind and shutter construction brand, has calculated 154 points for its trade-related business climate index, based on a rotational survey of specialist companies for the first quarter of 2017, an increase of ten points compared to the same quarter of the previous year. With an occupancy rate of 93 (2016: 81) percent, the R + S companies had more to do than in any other first quarter – a record. Two-thirds of the respondents expect a sustained increase in demand for the rest of the year; sales are really on the rise in 2016, 52 percent of the companies reported.

Chart: R+Tmarkets; source: BVRS

previously been part of window decoration, has captured the dimension of the figures and robust proofs for the additional use of indoor heating and acoustics. 17 percent of all construction workers should already be familiar with Duette, says Friedrich W. Petrat of Hunter Douglas Components.

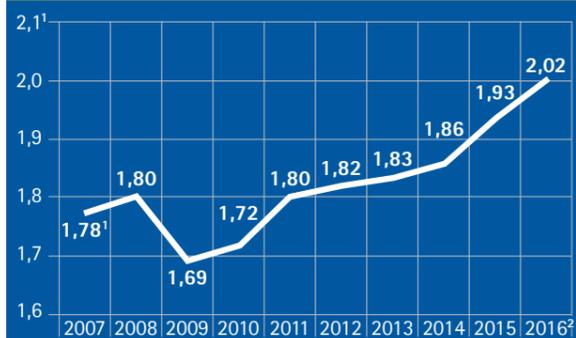
In connection with this, it has definitely been a victory to sun protection in the interior design trade, where Rollo & Co., according to the Zentralverband Raum und Ausstattung, represent the growth area par excellence; in this case, the trend is also clearly going in the direction of products that promise to benefit from more and consequently conquer the classic application of drapes & Co. This is especially the case because the interior sun protection products are not only purpose based – a fact that is illustrated by large-format photographs in magazines for higher living requirements. HD is consistently continuing with this connection of functionality and design and offers for the honeycomb batch size one or optionally to produce self-created Duette designs. It is quite possible, therefore, that the pleats boom will continue in the German market.

If an attempt is made to bring together the factors for the German market, along which development could take place in the next decades, then, most of all, we are faced with the exciting question: Who will bring sun protection indoors in the future – and what else will they have? Cooperations such as MHZ Hachtel and Günthner as the developers of the architecturally high-quality guardrail "to safe", give an idea since more and more companies are positioning themselves as an all-round problem solver for windows or terrace doors –

as the rule says: Whoever comes first, here to the building site, carries out the order; for its part, through, clever forged networks across trade boundaries. Clearly, the qualification and a coherent overall appearance as a competence partner play a key role here. Whoever understands that and invests in good personnel on time, will be holding all the aces: Energy saving, user comfort for an aging customer base and building with glass have made sun protection winning issue 4.0.

Reinhold Kober

Sales of the German gate-industry 2007 to 2016



¹billion euros | ²preliminary estimate

Chart: R+T markets; source: BVT – Verband Tore



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France: Windows and Solar Protection systems growing strong

The aesthetics of sun protection plays a large role in the french market – like in this case a scenery with products from Technal. Photo: Technal



CURRENTLY, THE FRENCH OUTDOOR CARPENTRY MARKET HAS A TURNOVER (FOR SUPPLY AND INSTALLATION) OF 20.48 BILLION EUROS (EQUIPBAIE-MÉTALEXPO. WWW.EQUIPBAIE.COM) OF WHICH CLOSURES, BLINDS, GARAGE DOORS, GATES, AUTOMATIC DOORS ... MAKE UP A TURNOVER OF 3.4 BILLION EUROS. EXTERNAL DOORS HAVE A TURNOVER OF 1.24 BILLION EUROS, WHEREAS FOR WINDOWS IT IS 8.9 BILLION EUROS. THE FRENCH OUTDOOR CARPENTRY SECTOR REPRESENTS 52,200 COMPANIES WITH 178,000 EMPLOYEES.

The various components of the French blinds market have experienced contrasting developments in recent years. In the case of internal custom blinds, the area of roller blinds has been the most dynamic: +5 % in 2017 (MSI Reports. Le Marché des Stores en France. Mai 2017. www.msi-reports.com).

CONTRASTING DEVELOPMENTS FOR BLINDS IN FRANCE

Conversely, sales in Venetian blinds fell by a little more than 6%. The trend has also been negative for vertical blinds (-3%). The market for blinds has been losing ground (-3%), suffering (among other things) from the product's aging image among younger generations, who often prefer a pergola. This market sector, the most valuable, is struggling to rebound. It is now



Glass architecture with big glass panes offers an interesting market for blinds. Photo: Midi Stores

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 **R+T 2018 MESSE STUTTGART**
HALLE 5, STAND 5B38

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Door systems have to deliver more than function in today's market, like this example by Groupe Maine. Photo: Groupe Maine

of regulating light and heat externally and subsequently adapting the level of transparency accordingly. Others are working on window models capable of producing solar energy by means of solar cells or transparent solar panels. Ultimately, some windows could display the time, the weather, the house's energy production or even show the TV.

WILL EMMANUEL MACRON, THE NEW FRENCH PRESIDENT, SUPPORT CONSTRUCTION?

Under the presidency of François Hollande, the French government had put a number of measures in place, including tax measures, to encourage the French to invest in improving the thermal performance of their homes.

Will it be the same for the new President of the French Republic, Emmanuel Macron who was elected in May 2017? His programme does contain a certain number of measures. In addition to his desire to not get rid of the existing arrangements (see below), President Macron has said that "construction needs stability to keep investor confidence. No investment without confidence. Therefore, priority must be given to boosting supply before revising the aid measures directed at the sector" (Interview Batiactu mai/2017; www.batiactu.com).

Frédéric Taddei,
director of the VERRE & PROTECTIONS MAG magazine



about 40 % lower compared to its 2007 levels. The market for vertical blinds seems to be following a slightly downward trend. Finally, the adjustable venetian blind market stalled in 2014-2015, before getting back on track in 2016 (+16 %).

WHAT IS THE OUTLOOK FOR WINDOWS IN FRANCE?

The French window market dropped, in 2013-2015, by 8 % and has dropped by 17 % since the end of 2006, after having reached its peak in 2005-2006 with 12.3 million windows whilst enjoyed an average annual increase of 4 % for the 2000-2006 period. Since 2008, the market share has seen an average decrease by about 5 % (-4 % in 2010, -5 % in 2012 and -8.3 % in 2015).

The import share is rising sharply. It constituted almost 10 % of the market in 2016, whereas it only made up 2.6 % of it in 2002. PVC and wooden windows have been suffering more from the competition (78 % and 14 % respectively) as have aluminium (8 %) and mixed windows (1 %), to a lesser extent (marché des fenêtres en France à fin 2016 – Edition mars 2017. TBC Innovations. www.tbccinnovation.fr).

INCREASINGLY MORE CONNECTED SMART HOMES AND BAY WINDOWS

Finally, smart homes and integrated devices are making their mark on the French market! Thanks to very important global players, such as the Somfy, Delta-Dore and Legrand groups, French consumers can easily control all installed devices remotely... including opening and closing. Some French researchers are also working on composite materials capable

Construction aid in France (until 1st June 2017)

Since 1st September 2014, there has been a "zero interest rate eco-loan" in place in France: a loan with a zero percent interest rate, available unconditionally for financing renovations works aimed at improving energy performance, which is available until 31st December 2018. It is available to all homeowners, regardless of whether they occupy their home or rent it, and allows a loan of up to € 30,000 for carrying out eco-renovation works. It is to be repaid over 10 years.

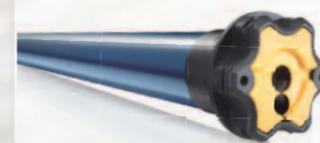
Another system that has been proposed to the French is the "Tax Credit for the Energy Transition" (CITE). It is available to homeowners and tenants and allows unto 30% of the expenses to be deducted from income tax (capped amount).

Energy Saving Certificates (CEE) provide financial aid to owners who are carrying out energy renovation works. The "energy premium" amounts are variable and can constitute up to 10 % of the amount of work.

Finally, VAT at a rate of 10 % applies to renovation works in France. A special energy renovation rate of 5.5% only applies to those windows eligible for CITE.

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Check it out at www.somfy.de/rs100



Italy is reflecting on its aesthetic strengths



A pergola system with adjustable slats is provided by Corradi as a climatically flexible solution.
Photo: Corradi

INCREASING DEMAND, A STRONGLY FRAGMENTED INDUSTRY WITH A GREAT DEAL OF PROVIDERS AND SEVERAL TRENDSETTERS ACTIVE ON A GLOBAL SCALE ALL SHAPE THE ITALIAN SCREENING AND SHADING MARKET. COMFORT AND AUTOMATION HAVE ESTABLISHED THEMSELVES IN ITALY AS STRONG DRIVERS OF DEVELOPMENT.

The solar protection manufacturer, KE Protezioni Solari, has reported an increase in sales for 2016, both in Italy and globally. "In Italy alone, we have seen a 25 percent growth in sales up on the previous year. This fact serves to confirm the positive trend of the last four years", says Simone Mazzon, CEO of KE. He is expecting momentum for the future with his company's "Gennius" pergola systems. The industry is exhibiting constant growth. The company Corradi also witnessed a positive business trend in 2016 and it is only thought it will continue in Italy and globally for 2017 and 2018. In particular, the pergola product range with mobile slats has clearly grown in the domestic market. The German awning manufacturer, Markilux, sees Italy as being particularly interesting and as one of Europe's four large markets. "In the future, we will be able to assume slight, annual growth", says Klaus Wuchner, head of sales and marketing at Markilux. In the

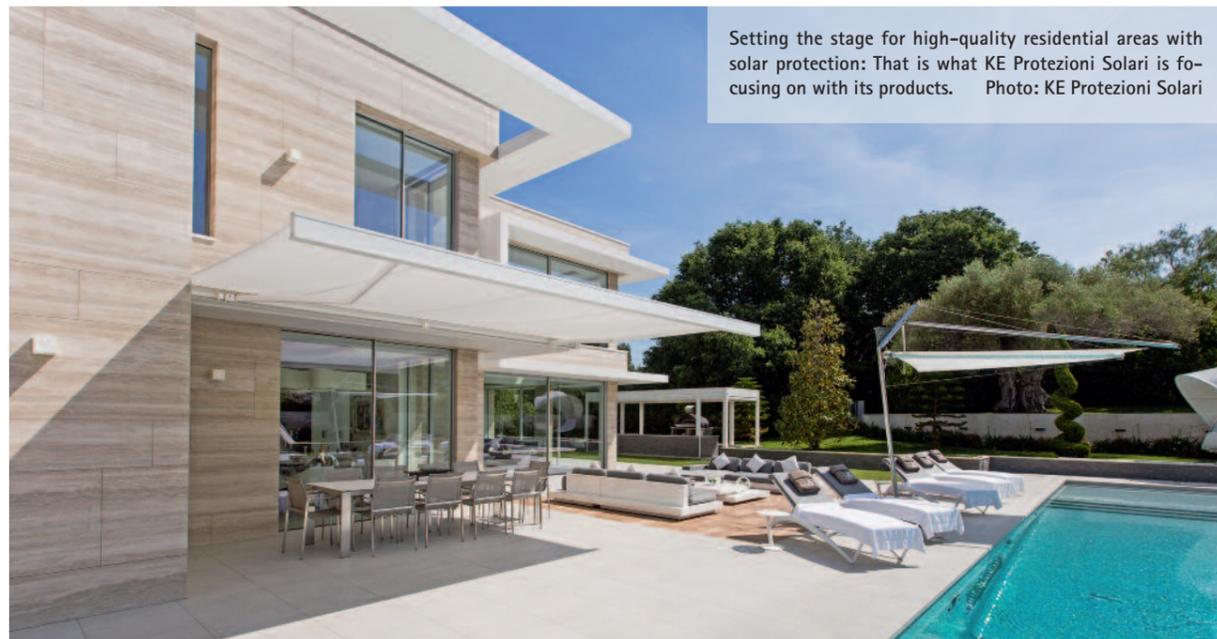


Italian strength in action: Corradi is demonstrating an unusual design with its Pergotenda Move.
Photo: Corradi

VEGA LIGHT TO DESIGN



Essential design, impressive lighting. A thin ray of light designs Vega in the skyline, as a new landscape just sketched. Clean lines with a new colour palette to combine. Vega ensures maximum comfort with a wide range of add-ons. A pergola like no others. Maybe we should call it comfortable sculpture.



Setting the stage for high-quality residential areas with solar protection: That is what KE Protezioni Solari is focusing on with its products. Photo: KE Protezioni Solari

view of Somfy, the globally active drive and control manufacturer, the Italian market is slowly recovering from the recession. Subsequently, motorisation rates have increased to around 38 percent for shutters and 50 percent for awnings, respectively. For niches such as pergolas, the motorised share of newly produced systems could reach one hundred percent in the next few years.

MOMENTUM FOR THE INDUSTRY

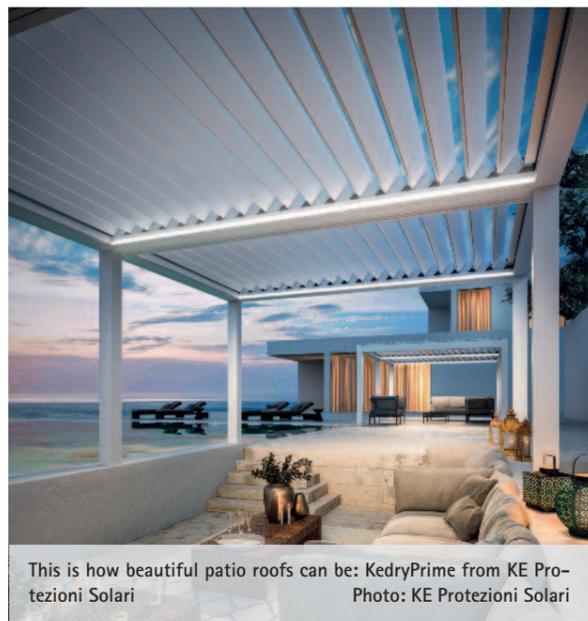
The Italian state is promoting energy-saving products as part of an environmental bonus with the possibility of a tax rebate. This also includes solar protection products. Mazzon can see the positive effect of these measures on sales in the industry and expects this promotion to continue in 2018. Domestic and foreign market players are changing how screening and shading products are being perceived by customers. "The Italian market now requires an aesthetically pleasing solar protection product, which also has to provide technical innovations", says Mazzon. Awnings and pergolas would no longer be seen by buyers as being purely functional products. Lifestyle, design, new technologies and the expression of individuality by means of the products are seen by Corradi as being important new aspects that will connect customers with screening and shading. Somfy stresses Italian customers' desire for comfort, safety and energy efficiency, which equipping the features with drives and SmartHome controlling with an app will benefit from.

MARKET STRUCTURE

The Italian blind market is, according to Somfy, strongly fragmented and made up of small and medium-sized companies that are focused on regional sales. This structure can also be seen in the awning product range. Some of the larger manu-

facturers are setting both national and international trends in innovation and design. "The pergola systems and canvases from the large manufacturers have helped to bring solar protection products more into the focus of living and design", says Wuchner. Mazzon sees vertical awnings with screen fabric as being on the march, which, with their appearance, follow the reduced lines of modern architecture. Corradi and KE want to set their pergola system trends – specifically, solutions with automatically adjustable solar protection and patio roofs offer potential for growth. Companies want to focus on the traditional Italian strength of high-quality design.

Matthias Heiler



This is how beautiful patio roofs can be: KedryPrime from KE Protezioni Solari Photo: KE Protezioni Solari

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Spain's Solar Protection sector is getting ready for new challenges



The hotel industry in Spain offers a big market for the sun protection sector.
Photo: Protección Solar

DUE TO ITS SPECIAL GEOGRAPHIC AND CLIMATIC SITUATION, SPAIN IS A COUNTRY THAT HAS ALWAYS NEEDED AND SOUGHT STRATEGIES FOR FINDING WAYS OF PROTECTING ITSELF FROM THE EFFECTS OF THE SUN. ITEMS SUCH AS BLINDS, INTERIOR CURTAINS, AWNINGS, TEXTILE BLINDS AND PERGOLAS ARE A CONSTANT FIXTURE IN HOMES, WORKPLACES AND PUBLIC SPACES THROUGHOUT THE COUNTRY, WHICH ALL SERVE TO GUARANTEE THE COMFORT OF THOSE USING THEM.

The regulatory framework for the awnings and blinds sector in Spain is defined by the standards "UNE-EN 13561: 2015. External blinds and awnings. Performance requirements including safety" and the "UNE-EN 13659: 2016. External venetian blinds and blinds. Performance requirements including safety". Furthermore, the Technical Building Code (CTE) is also being considered as part of this regulatory scenario, which serves to define regulations for the area where these products are installed, which is, generally speaking, on buildings, and the product's CE marking whose conditions are set out in the European Construction Products Regulations (CPR). On the other hand, Directive 2010/31/EC on Building Energy Efficiency, according to which any new buildings must, by

2020, consume almost no energy – known as NZEB (Nearly Zero Energy Buildings) – will also present a challenge for all of those products that make up part of a building's outer covering, just as is the case for components offering solar protection. This directive coming into effect may bring about a turning point for solar protection in terms of architects ordering products. As part of a building project, architects usually dictate the type of solar protection system to be included – blinds, awning, textile blinds. Despite this, until now the promoter tended to avoid these solutions to cut down on work and they often just dropped from the project. Ultimately, the decision to adopt this solution passed on to the user with the inherent

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disadvantages that this caused in terms of differences in quality or lack of creative coherence in the work. Now, the new legislation make it mandatory for these solutions to be incorporated into the project.

PECULIARITIES IN THE SPANISH SECTOR

The Spanish solar protection sector has historically been characterised by being individualised, fragmented and by its lack of professionalism. Until a few years ago, there was not even an association that represented and defended its interests. It is now represented in the form of Group VII: Blinds, awnings and accessories, from ASEFAVE, the Spanish Association of the Manufacturers of Light Façades and Windows.



Awnings are an integral part of the terrace design in Spain. Photo: Protección Solar

Furthermore, this year has seen the creation of ANEGS, the National Association of Solar Management Experts, which was born out of a desire to bring the sector together.

All of these initiatives are yielding results, such as the "Solar protection manual. Blinds, awnings and textiles", published by ASEFAVE as well as the work begun for putting together an "installation manual", also carried out by this association. In Spain, the awning sector is formed around three types of different players:

- Manufacturers of raw materials:
 - Support elements
 - Fabrics
 - Lifting systems: cranks, motorisation and management and automation
- A fitter – a professional that manufactures the awning, tailor-making every hole and place.
- An installer: It can be the same manufacturer or another professional, who sells the awning when it is ready.

What is more, last October saw the first session of Veteco Solar taking place in Madrid, celebrated in tandem with Veteco, the Window and Glazing enclosure hall. At its first event, Veteco Solar brought together more than 80 companies and held the "1st Iberian Congress on Solar Protection and Management", organised by its own competition, the "Protección Solar" magazine and Interempresas Media.

TENDENCIES IN THE SPANISH SECTOR

Spain possess a climate that allows for most social activities to be carried out outside the home, whether that is in gardens or on terraces that can be either private or public. This means that there is a variety of different solar protection solutions. With this in mind, we can group the tendencies as follows:

- Awnings that take a minimalist approach, marked by today's modern architectural style.
- Awnings, blinds and textile blinds created to take advantage of the energy efficiency of homes and buildings in the third sector.
- Bioclimatic pergolas for public use of terraces, bars and restaurants, as well as private use.
- A tendency towards smooth colours in awning fabrics.
- Integrating apps for managing Smart Home systems, which can be run from a smart phone or tablet.
- A tendency to personalise fabrics by means of digital printing or 3D printing technology.
- Using intelligent fabrics that are able to act according to requirements.
- Using augmented reality or 3D tools on the part of the manufacturers themselves for determining products.

In conclusion, Spain's solar protection sector is confronting new challenges with large hopes, by also bearing in mind that the work being carried out for professionalising a sector that, until now, worked in a very individualistic way.

José Luis París – Editor-in-chief "Protección Solar" magazine



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"The future for our industry looks very bright"

Enormous potential for the industry: To avoid overheating, big glazed facades require a smart combination of internal and external solar shading.

Photo: Metzger



IS SOLAR PROTECTION BEING FACED WITH A GOLDEN AGE? WHAT FRUITS IS THE LOBBYING WORK OF THE EUROPEAN SOLAR-SHADING ORGANISATION (ES-SO) BEARING WHO, AS THE UMBRELLA ORGANISATION, ARE NOW REPRESENTING SOLAR PROTECTION ON A EUROPEAN LEVEL? THIS QUESTION AND MORE ON THE FUTURE OF THE INDUSTRY ARE ANSWERED BY THE PRESIDENT, PETER WINTERS.

R+T markets: Mr. Winters, how do you see the status of solar protection in the individual European markets?

Winters: In doing presentations for ES-SO, I often make the probably truthful joke that Solar Shading is the second oldest trade. Adam and Eve already understood the importance of shade, looking for protection under a tree! Solar Shading products have indeed existed for thousands of years but, for a lot of consumers today, solar protection is first thought of as sun protection cream for their body. The living area and the skin of the building around them, however, should also be seen as a body which needs dynamic flexible adaptation to the permanently changing environment. This creates the healthy and comfortable non-artificial environment which

makes people naturally feel well. We should profit from the sun with our smart adaptable solutions today, temper it when it is too harsh or do not need it and use the maximum out of it in all situations also when we know that, in most countries, the majority of the day is overcast. Solar shading solutions can always offer the best solution, much better than only glass can. It should be a real partnership, since maximising glazing and daylight is only possible with dynamic solar shading solutions. These elements are still completely undervalued in our markets, but are the key to success for both glazing and shading combined as an unbeatable partnership.

R+T markets: How many solar protection brands do you feel there are in Europe, which are also known to architects?

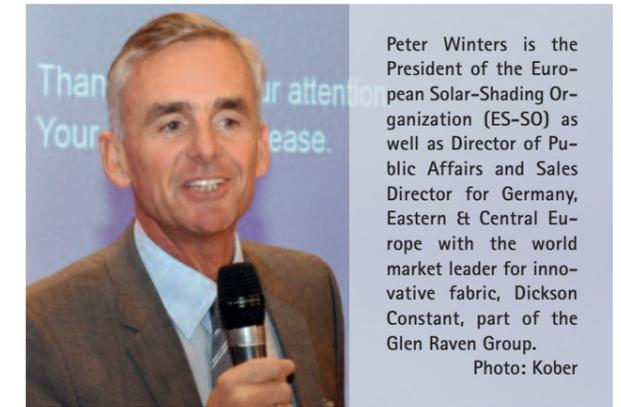
Winters: Yes, the architects who plan the facades certainly know the strongest brands. Unfortunately, they do not correctly recognise and know the real value of smart solar shading solutions yet. This is even truer for the end consumers who often have no clue of building physics and the very positive influence which our solutions can bring. This is also because our atomised industry does not offer strong, focused messages; everyone communicates other values and advantages and that means our messages very often get lost.

R+T markets: How well placed is Europe in the field of saving energy compared to the USA?

Winters: Look at the reaction of the politicians when President Trump decided to withdraw from the COP21 climate agreement. Europe is more than ever unified in meeting the energy efficiency target of 40 percent by 2030 in accordance with directive 2012/27/EU and the de-carbonisation goal of 80 percent by 2050. Buildings use 40 percent (+/- €400 billion of which more than 50 percent is imported) wherein the total energy and heating, cooling and artificial lighting consume the major part of this. This is why the EC is pushing for a new EPBD in finalisation that will set the new building codes in all EU countries via legislation respecting that directive. This will evolve in innovative ways in order to build and it will no longer be business as usual knowing that Europe pushes for energy efficiency first principle. This pushes for our solutions which incredibly improve energy efficiency. Smart Solar Shading solutions combining external and internal shading, but also outdoor living spaces are really a European technology, and we managed to show to the European Commission that, thanks to it, up to 22 percent of heating and cooling energy can be saved! Our new vision for solar shading study which we presented in R&T Stuttgart 2015 clearly indicates that shading is the secret champion for energy efficiency improvements. Europe clearly leads the dance for energy and climate performance but also for dynamic solar shading that helps achieve the set goals!

R+T markets: Is solar protection expecting a golden era? What kind of future prospects do you see for the industry?

Winters: There is a potential in the whole of the EU for 3.09 billion windows to be replaced because they are out of date. At the same time, new build and renovation are increasing to nearly a Zero Energy building, which means extreme insulation and airtightness. For many architects, the easy solution is more highly insulated opaque parts and not more glazing. Thanks to solar shading, the energy balance, optimised energy gains and minimised energy losses for windows are always at their best. Using a combination of external (low g-values) and internal (glare protection and high g-values), the window is optimized in such a way that the façade becomes dynamic and at its best, thereby allowing the use of big glazed areas without overheating risks. At the same time, a natural comfort and always optimised daylight are guaranteed. This is of



Peter Winters is the President of the European Solar-Shading Organization (ES-SO) as well as Director of Public Affairs and Sales Director for Germany, Eastern & Central Europe with the world market leader for innovative fabric, Dickson Constant, part of the Glen Raven Group.

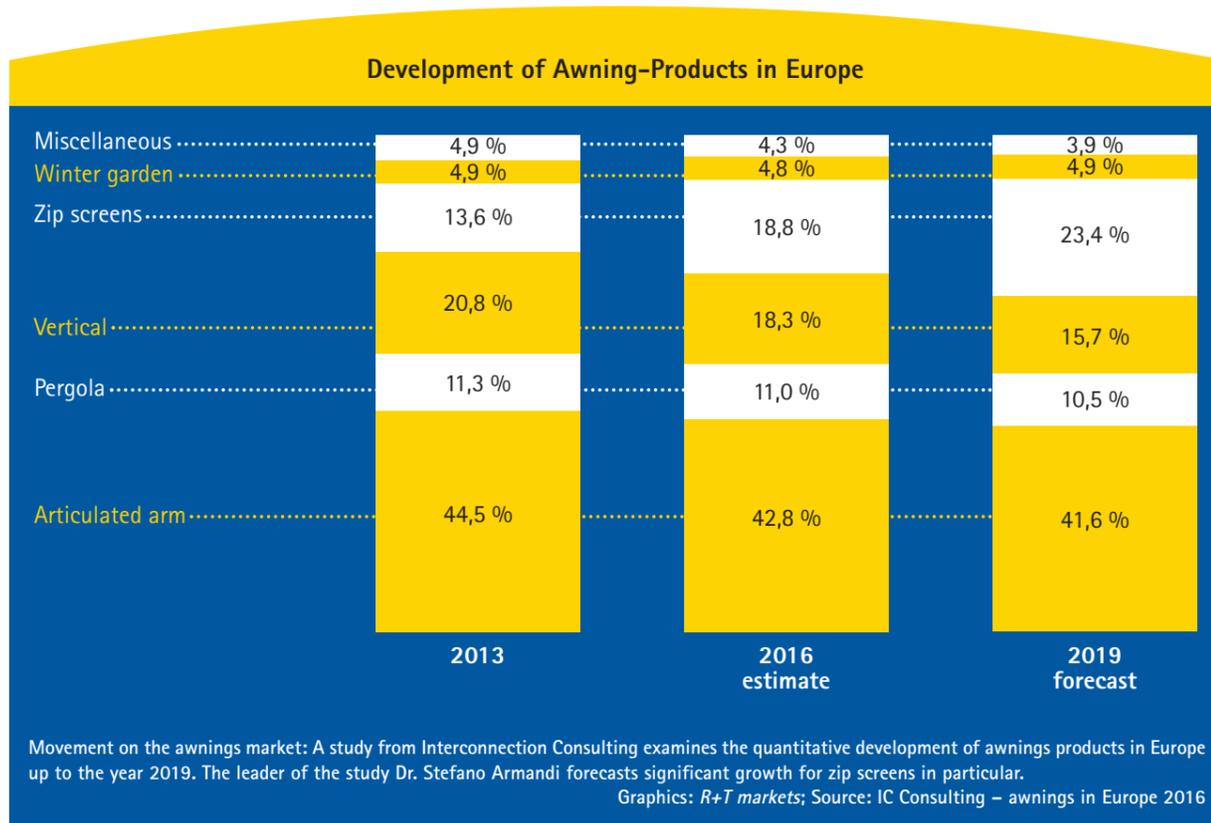
Photo: Kober

utmost importance as we see a dramatic increase of overheating in buildings. This is exactly what we prove with the white paper "Overheating risk in low energy buildings" which indicates that the new challenge will be to combat the overheating in buildings.

Very surprisingly to most, already today with the old existing building stock, 100 million people are unable to keep their dwelling cool in the summer; compare this with 50 million people who are unable to keep it warm in the winter. The changing building methods combined with climate change will rapidly and exponentially increase this overheating unless a dynamic smart combination of internal and external solar shading is always combined with renovated and new windows. Thanks to dynamic shading, the quality of daylight can be kept at its best, in which only excessive daylight is managed and tempered, but it is not influenced by metallised coatings that create a sort of artificial light spectrum. This changed daylight influences our biological clock and that is why people feel better when they go outside, but they do not know the reason for that! With clear glazing and dynamic shading, people simply feel better and healthier. If we manage this partnership with the glazing industry, more glazing will be the result, and for our industry the future for our business looks very bright. We will need to increase our capacity in a very important way, and also our professionals will be able to drastically upgrade their capacities and trainings for their teams as smart solar shading really becomes an essential technology.

R+T markets: What do the buildings of the future look like? What role do SmartHomes and automatisations play in solving the energy problem?

Winters: Of course one of the most interesting challenges will be to integrate Smart Solar Shading into the SmartHome standards, meaning that it also influences the heating, cooling, ventilation and lighting combined smartness. With the very quick developments of the Internet of Things, this is a real opportunity to move in fast forward. It will evolve in better and healthier buildings, in which people understand why smart solar shading is operating in order to make them feel better.



R+T markets: How can the added value of solar protection products be brought to the final customer?

Winters: The best will be that ES-SO creates a campaign that will put the right focus on all the USPs, which there are a lot. If all brands are communicating differently, as a sector we lose too much focus! National members will be granted the use of this brand, making our messages focused in the market. We will launch this campaign at the next R&T Stuttgart 2018 during a specific ES-SO seminar on 1 March. Come and see us!

R+T markets: Dickson Constant has led a successful marketing campaign with Area+. How much effort was required and what feedback have you received?

Winters: Area+ is dealing with the new desire to enjoy outdoor living. Up to now, pergolas are very often made out of metal or PVC fabric which makes people not really feel in the same decorative environment outdoors as if they were indoors. We spend 90 percent of our daytime indoors, when our ancestors spent 90 percent of their time outdoors. The last 100 years, the human body went through a bigger change of environment than the 500 years before Darwin. People want to be outdoors, and in the last ten years, outdoor living has experienced a fantastic development because of this. This Area+, however, needs to be just as decorative and beautiful as the indoor decoration, and our collection brings the quality, and exceptional fabrics that combine design and performance

so that consumers can expand their living area to indoor and outdoor without barriers. The best manufacturers have in the meantime adapted their products and tests so that they are now able to use Expansion fabric (a special acrylic with improved characteristics both on stability, resistance and including a transparent membrane that makes it waterproof) but also Sunworker Cristal, and even outdoor XL curtains of our well-known Sunbrella brand. These curtains are installed in the spring, left outdoors all year, and washed in the wintertime.

R+T markets: What is the role of ES-SO on a European level and is this work bearing fruit?

Winters: ES-SO has been in business for twelve years, as the real umbrella organisation for Solar Shading trade associations in the EU and even worldwide. We have witnessed a spectacular development in knowledge and we stand for 400,000 people across the 28 states of the EU with a TO of over €35 billion. Our pillars of action are the following: EU lobby: EPBD Review; Demonstration benefits of shading; Communication Campaign; Knowledge hub and Training development; ES-SDA validated product database. At the beginning, the EU units for energy and health did not know our technology at all, and now we are being consulted as a real knowledge centre for the new Energy Performance of Building review. We are truly considered now and that was not at all the case twelve years ago.

Interviewed by Matthias Metzger

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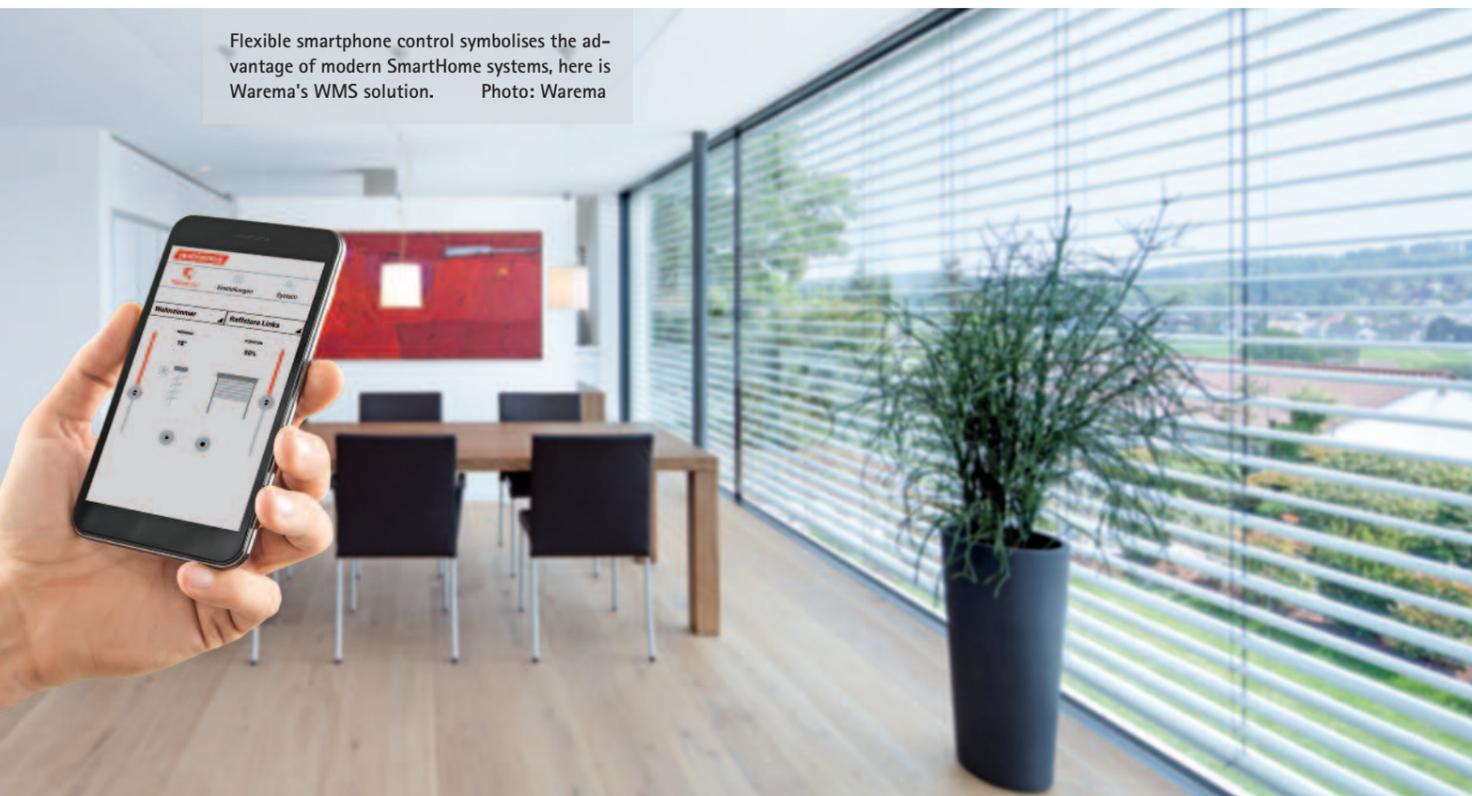
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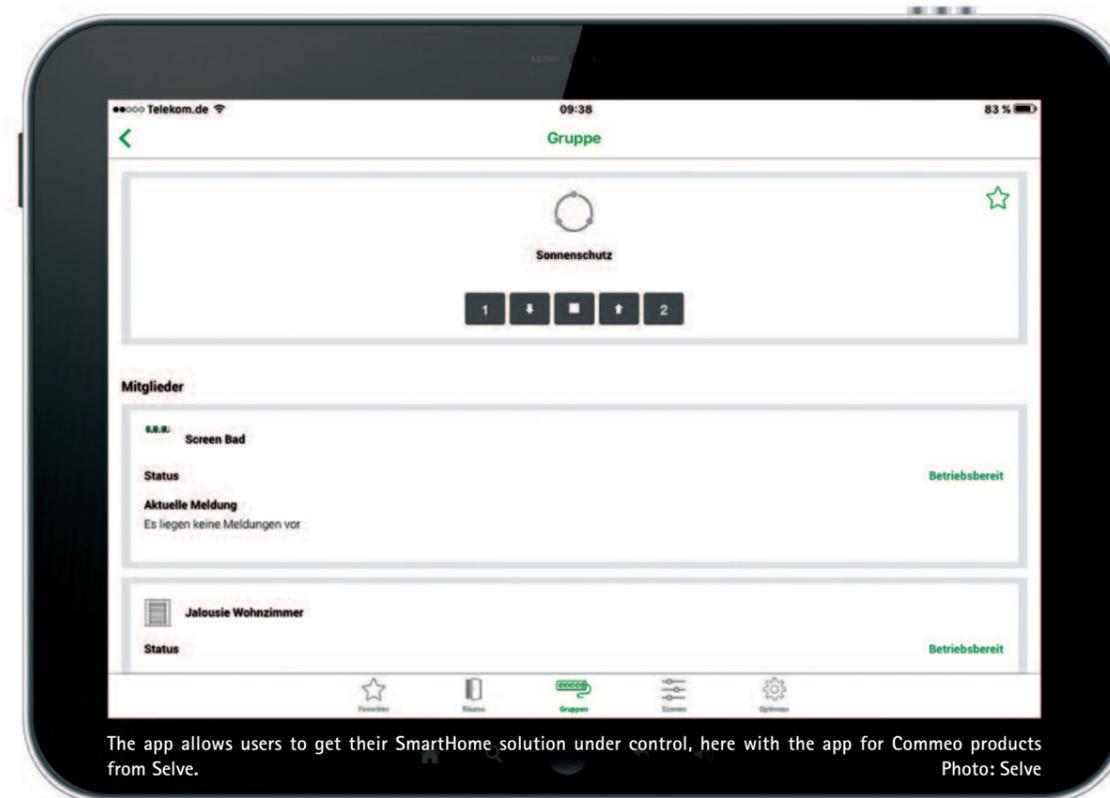
Intelligent screening and shading is going its own way

Flexible smartphone control symbolises the advantage of modern SmartHome systems, here is Warema's WMS solution. Photo: Warema



SmartHome at a glance

- market penetration rate in Germany between four and five percent 2016
- estimated penetration rate in Germany of 35,2 Percent 2021
- solutions range from web-based systems to local server and mobile app
- key for market success 1: compatibility of components from different manufacturers
- key for market success 2: easy installation and specialized support for specialist traders



The app allows users to get their SmartHome solution under control, here with the app for Commeo products from Selve. Photo: Selve

THE DIGITALISATION OF BUILDING TECHNOLOGY AND CONTROLLING THE ATTACHED DEVICES FOR THEM TO BE USED BY THE FINAL CUSTOMER IS FINDING ITS WAY INTO THE ROLLER SHUTTER AND SOLAR PROTECTION INDUSTRY. HERE YOU CAN READ WHICH TRENDS ARE SHAPING THE SMARTHOME MARKET IN GERMANY AND HOW FAR THE TECHNOLOGY HAS SPREAD.

In Germany, manufacturers and specialist associations have been talking about the potential of SmartHome technology for the roller shutter and solar protection industry for years. A great deal of companies have developed solutions and positioned them on the market, with which specialist companies from the trade and specialist planners can meet the desire of the final customers for controllable screening and shading products. The solutions range from web-based systems to local server solutions for operations within the building right down to controlling connected products via a mobile app on a smartphone tablet PC when you're on the road.

SMARTHOME MARKET POSITION

How far have the solutions gone for controlling a SmartHome actually until now in the German market? It is hard to find exact figures in the industry. The penetration rate for Ger-

many is currently between three and four percent, according to the globally active control specialist, Somfy. A similar level is reached by the industry in France, Austria and Switzerland. The drive manufacturer, Geiger, estimates that SmartHomes have achieved sales of 1.3 billion euros this year in both the new construction and renovation markets in Germany. "Depending on the country, we are expecting growth rates of between 30 and 60 percent per year. The trend towards an automated home is strong and sustainable", says Dr. Marc Natusch, managing director of Gerhard Geiger. Selve, the drive and control manufacturer, sees pent-up demand in Germany. "A great deal of other countries, especially in Southern and Eastern Europe or the United Kingdom, are much further ahead. The predicted growth figures are enormous, meaning there is no way around SmartHome", stresses the managing director of Selve, Andreas Böck. The Federal Association for

Solar Protection Technology in Austria (BVST) annually collects data on what its members produce or sell on solar protection fittings both with or without a motor. To some extent, the control, which includes SmartHome, is sold through the solar protection specialised trade. However, a major part of the business also goes through other sales channels such as electricians, SmartHome specialists, electronics DIY or the Internet. "We do know that the degree of motorisation is around 63 percent, but it is not possible to collect any information beyond the level of the association", says BVST representative, Eng. Johann Gerstmann.

POTENTIAL FOR THE FUTURE

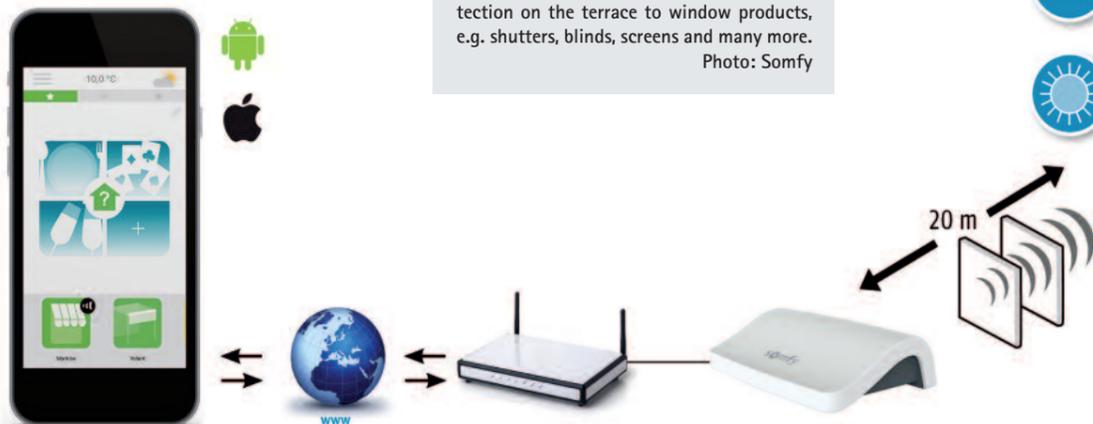
How do associations and companies see the potential of SmartHomes for the future in Germany? The Federal Association for Blinds + Solar Protection (BVRS), in its capacity as the German branch representative, sees great opportunities for the roller shutter and shading specialists thanks to SmartHomes. "For that reason, we have just joined the Smart Living economic initiative, for example, where numerous associations and companies have come together with the aim of especially promoting and advancing this area in Germany", stresses Christoph Silber-Bonz, managing director of the BVRS.

Rademacher, the control manufacturer, estimates that the SmartHome penetration rates can provisionally reach 35.2 percent for 2021. "The potential is enormous with 20 million owned properties and 21 million rental properties," says Eva Krepstekies, sales manager for roller shutters and solar protection at Rademacher. For further developing of the market, the company, in addition to direct measures to increase the level of recognition for the final customer, is mainly acting as a strong partner. Training sessions should prepare the specialists of roller shutters and solar protection technology for offering consultation and installing automated household functions. As a control and drive manufacturer, Becker emphasises the importance of simple assembly, commissioning and operating home automation in order to get rid of fear of contact that the specialist trade has with technology. Supporting the processors with a telephone hotline in solving installation problems also plays a central role for its market dissemination.

COMMUNICATION UNDER CONTROL

Simple solutions also determine the different products' keyword compatibility through the market success of SmartHome. Until now, the wide range of solutions that rely on

Connexoon allows the user to control many functions around the home: from solar protection on the terrace to window products, e.g. shutters, blinds, screens and many more. Photo: Somfy



different standards of control systems has made market penetration more difficult. Many components of home automation from one manufacturer do not communicate with another company's components. The solar protection manufacturer, Warema, wants to solve this problem by the integration of manufacturer and cross-trade platforms, such as Mediola. "Here, different devices from the manufacturers of more than 100 well-known brands are interconnected to make the personal SmartHome a reality", says Bernd Riedmann, Product Management & Marketing Manager at Warema Renkhoff. Control the entire home with a single app – Riedmann claims this is made possible with WMS Web-Control and Mediola. When using standard bus systems, such as KNX, you just do not have the interface issue. All devices are certified and communicate with each other. However, installing KNX is demanding and requires intense training. Geiger is attempting to integrate all control systems with interfaces into its own drives. "In addition to the Loxone-compatible AIR drives, we are now also supplying KNX drives and SMI drives", says Natusch. As a partner of innovation, Somfy is working with well-known industry partners such as Velux, Dimplex, Honeywell, EnOcean, G-U, BKS, Hoppe, Axis

and Eltako. That is why the Somfy SmartHome system TaHoma Premium is compatible with numerous SmartHome accessories from renowned manufacturers. The digital TaHoma control box communicates by means of io-Homecontrol, RTS, EnOcean or Z-Wave radio protocols and connects up to 200 products to individual comfort scenarios and presence simulations.

PRODUCT OVERVIEW

What makes the SmartHome solutions from the different manufacturers stand out? Becker drives rely up to hundred percent on radio solutions to save time and money in the installation. The user does not need an app to operate via touch screen in the building or web interface. The SmartHome solution from Loxone automatically reacts to the user's lifestyle and, similar to the assistance systems in cars, handles many everyday routine activities. Retrofitability places Rademacher at the centre of its product, HomePilot. Customers are gradually expanding their home automation systems according to their needs and they also have the option of integrating belt-fed solar protection into the intelligent house. Selve focuses on the flexibility and openness of its own products for other manufacturers' solutions. Selve radio protocols can be built into many pre-existing SmartHome systems. Easy entry into the world of the SmartHome: Somfy is pursuing this goal with the Connexoon home control system, which is based on App technology. A compact control box communicates with the digitally linked blinds, venetian blinds, roof windows, lighting and other products via the bidirectional io-Homecontrol radio protocol.

The quick start-up and storage of project data has been named by Warema as the central feature of its solution Warema Mobile System (WMS). The user can individually automate any sun protection product by means of the WMS Studio software.

Matthias Heiler

SmartHome Germany market penetration



Chart: R+T markets; source: Rademacher

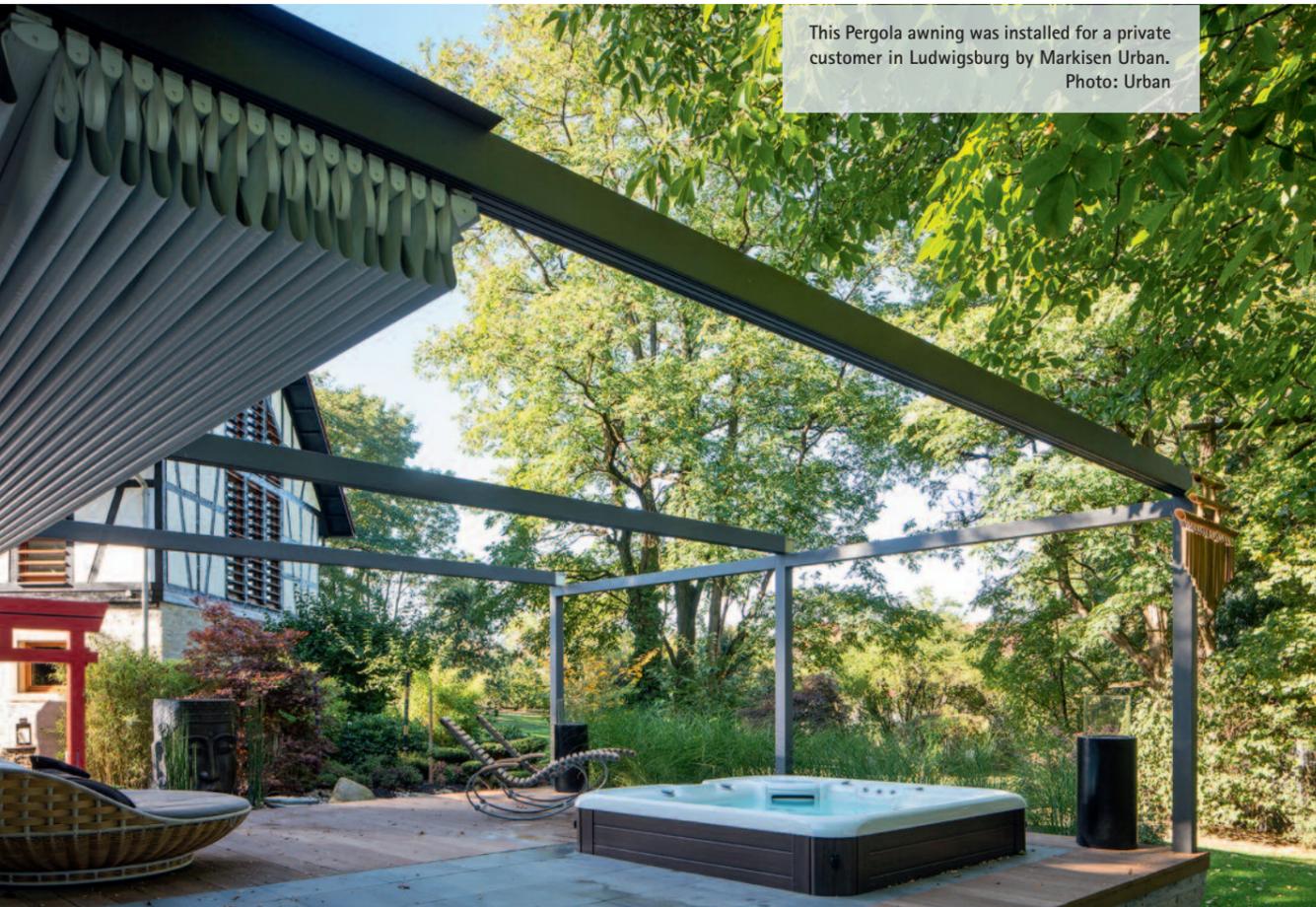


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A living room for the garden



This Pergola awning was installed for a private customer in Ludwigsburg by Markisen Urban. Photo: Urban

MANY HOMEOWNERS HAVE SUFFICIENT LIVING SPACE BUT WOULD LIKE TO HAVE MORE TIME TO SPEND IN THEIR GARDEN, EVEN WHEN THE WEATHER IS NOT PLAYING BALL. THE R+T 2018 IS DEDICATING AN ENTIRE AREA TO THE TREND OF THE OUTDOOR LIVING.

The demand for solutions for outdoor living is increasing. "More and more private customers want to expand their living area and create an oasis of well-being outdoors", says Stephan Urban, Managing Director of Markisen Urban in Pforzheim. Customer, therefore, increasingly are turning their attention to solutions that also protect against rain, such as pergola awnings and terrace roofs. The relationship between such solutions and traditional sun protection products, such as awnings, shutters and blinds, is about 50:50 at Urban – please note in terms of numbers, not sales. Outdoor Living is experiencing a strong upturn. And the new Stuttgart Trade Fair is responding to this trend. As Sebastian Schmid, Department Director Technology, says, the topic will

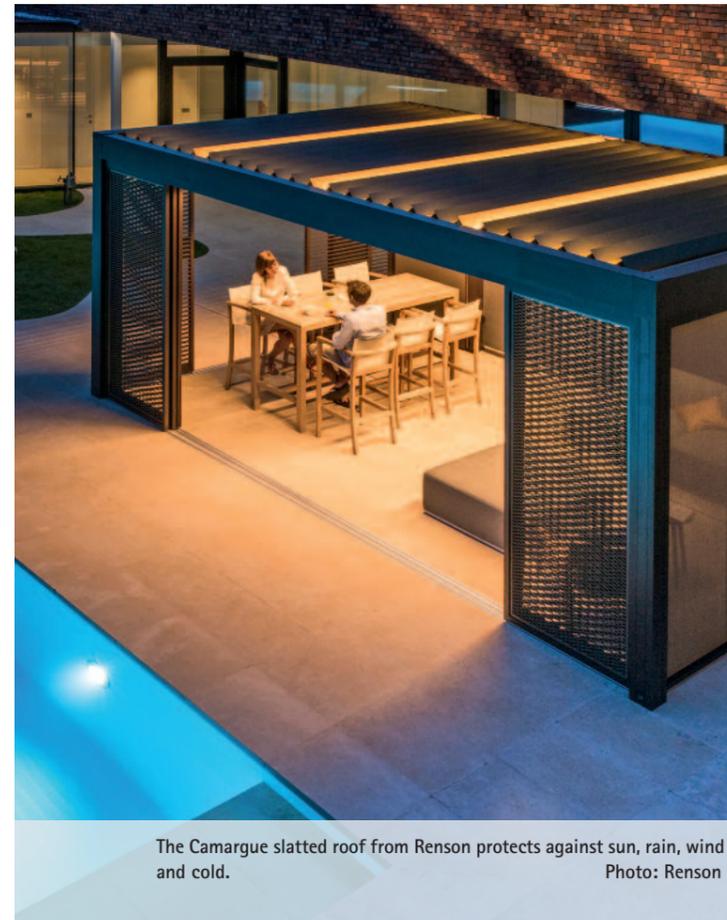
occupy a lot of space at R+T 2018. "Due to the development of the market, which shows a clear trend in outdoor living, we have optimised our hall concept. This was made possible by the new construction of the Paul Horn Hall (Hall 10)", says Schmid.

R+T 2018: NEW HALL, NEW MARKETS

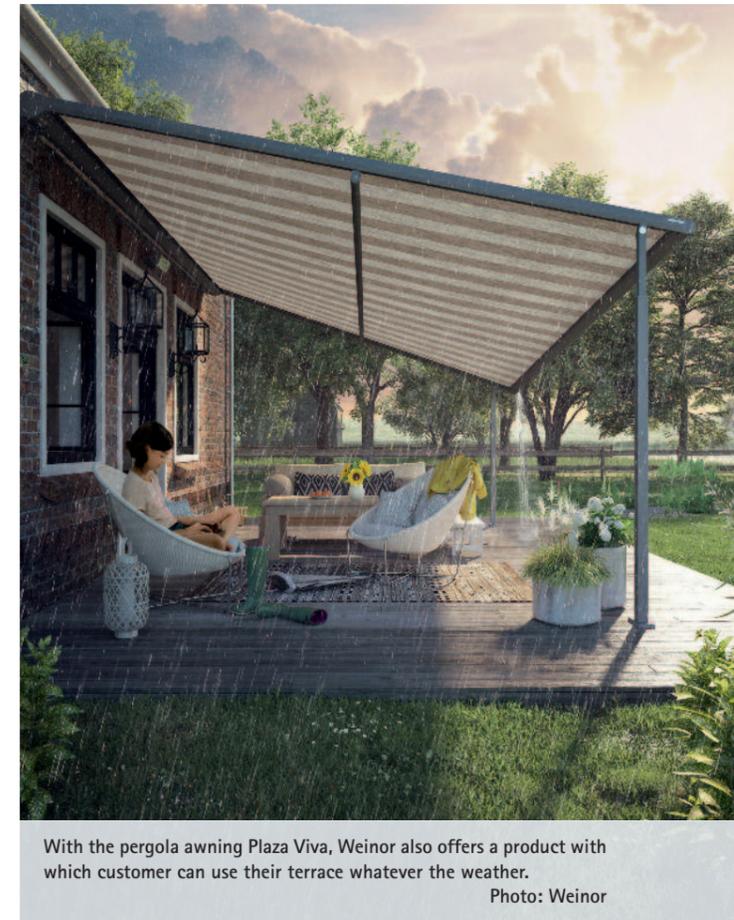
In the next edition of the world-leading trade fair, the trade visitors will find solutions for this area in the Oskar Lapp Hall (Hall 6). "We have recruited a lot of companies to create a Mecca for the area of gastronomy and hotel business". With this concept, in addition to the usual R+T visitors, the Stuttgart Trade Fair wishes to lure all decision-makers to invest in the expansion of catering areas.

R+T Turkey 2017: Outdoor living as a trending topic

At the R+T Turkey in March, outdoor living was one of the trend topics. "This is an issue of great importance for the Turkish market, a large proportion of our exhibitors at R+T Turkey come precisely from this market area", says Schmid. According to his statements, they meet their important customers there, such as decision-makers from gastronomy or hotelery. "Just the existing large number of domestic visitors, but also visitors from North Africa, the Middle East and Eastern Europe and Russia have shown a great need for reliable solutions for the area of outdoor living", added Schmid. The subject is expected to play a major role at the next edition of the R+T Turkey.



The Camargue slatted roof from Renson protects against sun, rain, wind and cold. Photo: Renson



With the pergola awning Plaza Viva, Weinoor also offers a product with which customer can use their terrace whatever the weather. Photo: Weinoor

According to Schmid, one thing is clear from the joint planning with exhibitors: If it can be made, it is here. "I would say that it is the right solution for every requirement – whether it is very small and narrow or imposing in size – that is increasingly in demand", says Schmid, who sees the exhibitors at the R+T as pioneers in terms of technology. Therefore, the manufacturers show solutions which are elegant and absolutely safe – no matter what size they come in.

REGULATED, BUT NOT OVER-REGULATED

Ralf Simon, Manager of Research and Development at Warema, knows the standard requirements sun protection products must meet. For example, terrace roofs are regulated at European level – just like the vast number of sun protection products, they fall under the Construction Products Regulation and must comply with the DIN EN 1090-1. "Here, static requirements are defined, since these products cannot be retracted in case of snow or wind", explains Simon. According to his statements, the standards attempt to define a standard

in relation to external and internal sun protection – like DIN EN 13561 for awnings, DIN EN 13659 for outdoor covers and outside blinds, DIN EN 13120 for indoor covers as well as the Machinery Directive 2006/42/EC for motor-driven sun protection – to make it difficult for low-budget providers to gain a foothold in the European internal market. Since there are no minimum requirements and also no checks carried out as standard, the effect of these standards is limited. "There is no question of over-regulation in the sun protection industry. Both the tests and the documentation can be completed without a testing institute, which puts responsibility on the manufacturer – but also gives them leeway", says the expert. According to Simon, Warema tests its products in accordance with the tests required by the standards. In addition, the company performs many of their own tests, some of which are place considerably higher demands on the products than the standards require. In essence, the factors are: wind, weather, temperature, dirt.

Matthias Metzger

The blind and shading trade in Germany and Europe



The specialist trade ensures the highest level of solar protection for the customers across Europe. Photo: Markilux

MODERN BLINDS, SCREENING AND SHADING OR GATES OFFER HIGH CAPACITY AND COMFORT TO THE FINAL CUSTOMER, ALTHOUGH THESE PRODUCTS ONLY LIVE UP TO THEIR FUNCTION IF THE TRADE BRINGS ITS COMPETENCES IN CONSULTING, ASSEMBLY AND SALE INTO PLAY. IN THIS ARTICLE, YOU CAN FIND OUT THE DETAILS ON THE STRUCTURE OF THE EUROPEAN TRADE FOR THE BRANCH.

How has the trade in Germany and Europe been organised to successfully live up to its diverse range of duties in the area of sales, planning and assembly for screening and shading products and gates? Based on figures from the German Confederation of Skilled crafts (ZDH), the number of companies entered in the Register of Craftsmen rose from 2,872 to 4,005 between 2006 and 2016 for technical trades relating to blinds and solar protection. In Germany, companies can register here without a Master of Craftsman title. For this reason, the Federal Association for Blinds + Solar Protection (BVRS) estimates that the number of qualified master craftsmen is significantly lower. "In this respect, there are plenty of service stations that can be registered for a whole range of unauthorised trades so as to be able to offer various services as a caretaker service. We believe that from these 4,005

companies, around 2,000 are seriously growing companies specialising in blinds and shading", says the CEO of BVRS, Christoph Silber-Bonz.

STRUCTURE IN EUROPE

In many European countries, such as France or Spain, for example, the profession is less classical and determined less by training regulations than in Germany. The sale and installation of roller shutter and solar protection products is often based on the experience of the internationally active control and drive manufacturer Somfy over the fitting market. The European market shows itself to be inconsistent with a view to the distinction between the companies specialising in blinds and shading and window builders. This difference plays an important role in the area of Germany, Austria and

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The manufacturer, Warema, collaborates with tradesmen in many European countries. Photo: Warema



Without being assembled competently, the best solar protection does not give any results. Photo: Warema

Switzerland. In many other European countries, solar protection is an integral part of prefabricated window features. Even Warema, as a manufacturer active on global scale, has a whole range of different experiences with the trade structure in Europe. "In a variety of diverse markets, it is possible to see that traders organise themselves into associations, which is comparable to what happens in Germany. In other markets, on the other hand, every market participant is absolutely self-sufficient", says Stephan Kliegl, head of sales at Warema Renkhoff. In the opinion of the awning manufacturer, Markilux, professional training differs a lot across Europe. "Whereas basic training in a trade or technical profession comes about at school in many countries, only a handful of countries are on the path, such as in the area of Germany, Austria and Switzerland, to work with a dual system aimed at the trade from the outset", explains Klaus Wuchner, head of sales and marketing at Markilux. While window manufacturers, locksmiths, metal construction companies, interior decoration firms, franchise companies and other specialists of roller shutters, solar protection and gates are operating in Europe, mostly specialised shutter and shading companies work, assemble and sell on the market in the above-mentioned region. In countries with more of a tradition of commerce, there are often distinct sales structures. According to Wuchner, these

companies place emphasis on advising customers in attractive show rooms with trained sales personnel. They solve assembly with partly very qualified subcontractors.

DIFFERENCES BETWEEN ASSEMBLY AND SALES

Metal, window and façade construction companies often prove to be a good partner for manufacturers in those countries, which are oriented towards the overall structure and in which architects are involved in the design and implementation. "There are no general differences and / or similarities, besides to the generally accepted standards, as the same types of houses or wall structures do not exist in every country", says Wuchner. When it comes to assembly and distribution, Warema also covers all conceivable distribution channels: from solar protection specialist companies to joineries to window and façade builders or the traders of construction components. The respective characteristics differ significantly from country to country. As a rule, however, the general contractor does not buy directly from the manufacturer but rather through the above-mentioned channels. "In many markets, we meet small and medium-sized tradespeople who, in addition to sales and assembly, also partially tailor their own products", explains Kliegl.

Matthias Heiler

The German Blind and Shade trade in figures

The number of registered companies that are part of the Blinds and Solar Protection Trade in 2016	4,005
Number of member companies in the Federal Association for Blinds + Solar Protection	760
Number of employers per company on average	9.7
Sales for the blind and shade trade in 2016	2.02 billion euros

Chart: R+T markets; source: Federal Association for Blinds + Solar Protection, Federal Office of Statistics, German Confederation of Skilled crafts

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Duette honeycomb pleats bring together advantages in saving energy and a huge variety of interior design. Photo: Duette

SOLAR SHADING PRODUCTS HELP TO REDUCE ENERGY CONSUMPTION – THIS ARGUMENT IS OFTEN HEARD. BUT HOW MUCH CAN ACTUALLY BE SAVED? LET US LOOK FOR ANSWERS.

What do solar shading products actually offer in terms of energy balance? To this end, the European Solar Shading Organization (ES-SO) published a study in 2015, which brings together all the facts we know today on the subject. The study assumes, amongst other things, that 70 percent of the energy in Europe is spent on a building's heating requirements and that 75 percent of all glazing is equipped with solar protection. With intelligent indoor and outdoor solar protection, energy and CO₂ savings of up to 19 percent are possible.

A DIRECT COMPARISON WITH AND WITHOUT SOLAR PROTECTION

As a matter of fact, studies on specific energy savings provided by solar shading products have so far been rare. The Fraunhofer Institute for Building Physics (IBP) in Holzkirchen, south of Munich, offers comparative measurements for determining savings: a small office space on the ground floor,

square, two identical windows, facing east. While the dark yellow shade of the blind on the left window gently darkens the room, the right window gives an unobstructed view outside. Appliances measure the temperatures for each section of facade section – in the room and in front of the facade. This is the experimental setup in the VERU research building. The investigations on both of the two windows take place under the same atmospheric conditions; the reference value measured makes it possible to detect product advantages directly.

Associations and manufacturers from the solar shading field also resort to the possibility of having their products tested under real conditions and on a real-life scale. This applies, for example, to the influence of indoor solar shading systems on a building's heating requirement during the winter months. The German association ViS for internal solar shading analyzed this in 2009.

Useful heat saving by solar and glare protection systems				
Energetic quality of building envelope	Useful heat demand without solar protection [kWh/m ² a]	Savings potential by nightly closing		
		Blind	Pleated with Perlex back coating	Pleated blinds
Two-pane heat protection glazing new construction	81,9	0,6 %	1,5 %	5,0 %
Three-pane heat protection glazing new construction	70,5	0,1 %	0,5 %	1,6 %
Insulated glass window old building	175,1	1,0 %	2,7 %	6,9 %

The graph shows the percentage of useful heat saving by solar and glare protection systems in residential buildings according to experimental setups and Fraunhofer IBP calculations. Chart: R+T markets, source: simulated calculations Fraunhofer IBP/ViS

The result of the investigations at the VERU building: With the help of the selected systems, improvements to the heat transition coefficient (U value) of typical old and new construction glazing are possible between 13 percent and 5 percent (roller blinds) and 46 percent and 25 percent (pleated blinds).

SAVE ENERGY IN WINTER

Using the example of a single-family house, simulated calculations showed that closed internal solar shading systems during night hours reduce a building's heat requirements by up to seven percent per year, depending on the glazing, climate and building condition (see diagram). Since the greatest savings were achieved in windows with low-insulation glazing, there are considerable energy saving potentials, especially in old buildings.

The results of the calculations for an office building were even more pronounced. If, during the winter months, an internal sun and glare protection system was used instead of an external one, savings of between 6 % and 25 % could be achieved depending on the boundary conditions. In addition, the researchers used the sun and glare protection as nightly, temporary heat protection, e.g. the pleated blinds, allowed a further reduction by five percent.

HOW DOES THIS REFLECT DUETTE?

On the basis of this study, Hunter Douglas had his own products investigated in 2011 – pleated blinds with different textile properties and for different mounting situations. The result: The selected systems improve the heat transition coefficient of typical old and new construction glazing by up to 55 percent. 34 percent is measured for Duette 32 Blackout in the glass strip. Thick substances and the assembly in the glass strip provided the best values in residential construction. The heat demand for a selected single-family house per year decreased

by up to twelve percent according to these calculations. Savings of between 4.5 percent and 32 percent were achieved in office buildings. An additional use of solar shading for nightly, temporary heat protection allowed further useful heat savings of up to twelve percent (Duette 64 Blackout).

Matthias Metzger



Big, bigger, Zip screen XXL Solar Protection – stable in the wind



With the ZipMa vertical awning with lateral guiderail along the Zip system, Reflexa is seeking to combine technology with design. Photo: Reflexa

A PRODUCT HAS BEEN CONQUERING THE MARKET FOR GLARE AND SUN PROTECTION: TEXTILE ZIP SCREENS COMBINE ELEGANT VISUAL EFFECTS WITH AUTOMATION, A HIGHER RESISTANCE TO WIND AND SHADE OVER LARGE AREAS. THESE ADVANTAGES CONTINUE TO CONVINCE CUSTOMERS AND SERVE TO INCREASE THE MANUFACTURER'S SALES.

With the help of its Zip technology and special guide rails, Zip equipment has expanded the range of application for textile sun protection products and brought new options to this range. This helps to eliminate a gap of light at the sides and the system allows for more effective blackout effect. An important point in favour of Zip screens is their stability at high wind speeds, thanks to which the user can also benefit from solar protection and shade when it is windy. The lateral guiderail reduces the formation of folds from the fabric

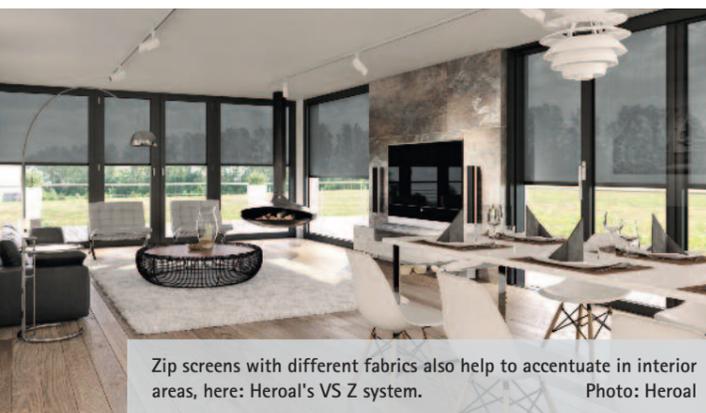
being under constant tension. Widths and heights of 600 centimetres are possible for individual systems – by connecting several screens, the specialist company can cover even larger areas.

BRANCH POTENTIAL

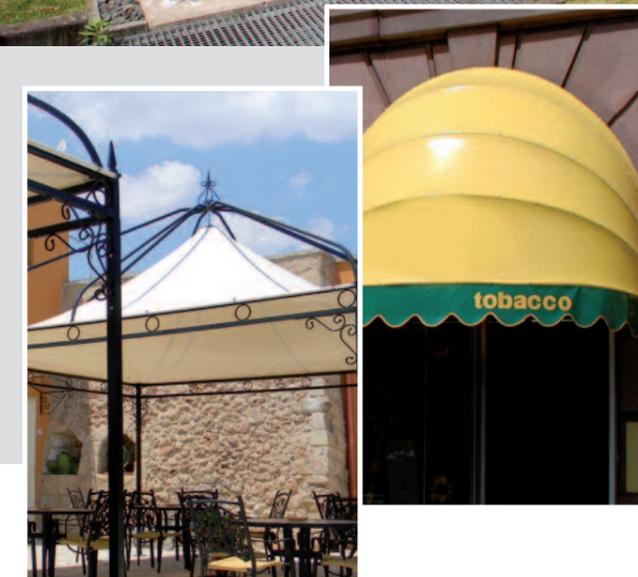
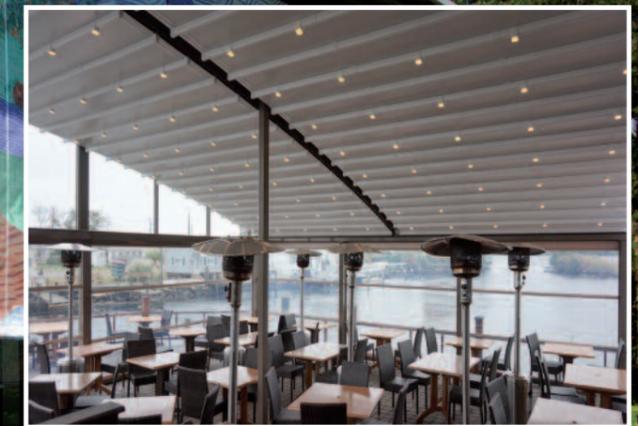
Zip screens offer a large potential for the solar protection branch. According to the estimates of industry experts, more than 250,000 systems have been sold in Germany, Switzerland and Austria until now. "Our future lies in automated Zip screens, amongst other things. These systems are stable in the wind and architecturally demanding. In particular, Zip screens offer potential in closed cavity façades", says Dr. Marc Natusch, managing director of the power unit manufacturer, Gerhard Geiger. "Every year, we are experiencing growth into double digits with the Zip screen vertical awnings", says Ingo Legnini, deputy managing director of Reflexa.

The manufacturer, Heroal, is looking at a market for its screen unit that are stable in the wind, which is becoming increasingly stronger. In many cases, builders and architects rely on screens instead of venetian blinds since they can also use these features on higher floors.

Matthias Heiler



Zip screens with different fabrics also help to accentuate in interior areas, here: Heroal's VS Z system. Photo: Heroal



Technical Textiles for

- Solar protection
- Façade cladding

Build with daylight sustainability



No artificial light during the day: In the Augsburg city library, light trumpets direct glare-free daylight into the building interior. More than 20 kWh/m² of artificial light energy can be saved every year. The concept has been designed by architects from Schrammel and the light planners from Bartenbach. Photo: Bartenbach LichtLabor/Peter Bartenbach

GOOD DAYLIGHT PLANNING OPTIMALLY SUPPLIES A BUILDING WITH NATURAL LIGHT AND HELPS TO SAVE ENERGY. IN ORDER TO PREVENT A ROOM OVERHEATING, A SOLAR PROTECTION DESIGN IS NECESSARY. MODERN PRODUCTS COMBINE BOTH REQUIREMENTS.

"Of course, daylight planning should play an important role in contemporary architecture", says Dipl.-Ing. Peter Zöch from Bartenbach, the renowned company for daylight and artificial lighting planning based in Aldrans/Austria. According to his figures, there are several reasons for this: Daylight can significantly effect a room's atmosphere. A good supply of daylight contributes significantly to the health and the psychological well-being of people. And, last but not least, energy can be saved with autonomous exposure of daylight – without artificial light switching. "Good daylight planning contributes significantly to sustainable construction", says Zöch.

DAYLIGHT PLANNING AS A DESIGN PARAMETER IN ARCHITECTURE

Holistic daylight planning begins with analysing the site, the geographic location and the local light situation. It goes on to the first design considerations regarding the orientation and composition of the building and the dimension of the

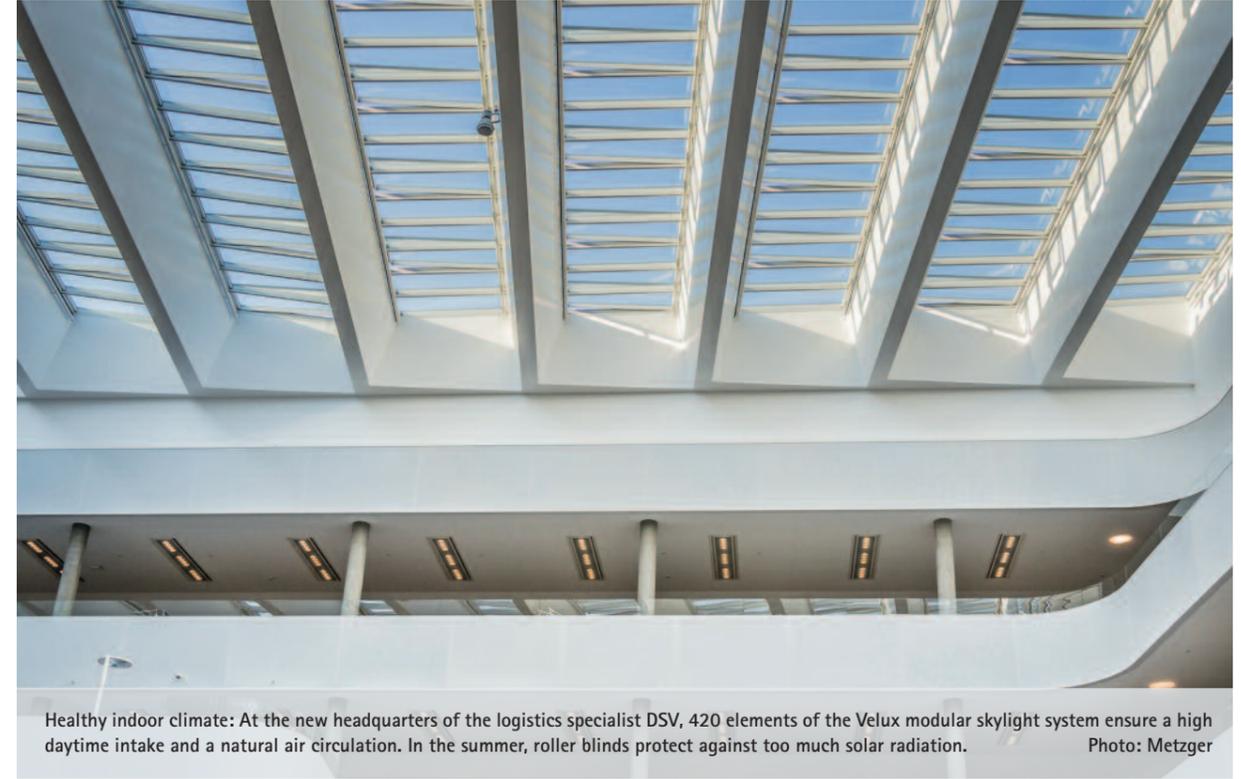
openings. Other important factors are: visual comfort, psychological and sanitary aspects of light as well as prevention of heat input and glare. If the orientation and the composition of the building are not aligned, then daylight criteria, according to Zöch will help to improve the light situation. "It goes without saying that these have to be individually adapted to the plans or thought about at an early stage of the planning", says the expert. According to his data, daylight systems also help to improve the supply of daylight in renovation projects.

VENETIAN BLINDS WITH DAYLIGHT CONTROL

According to Zöch, including sun and glare protection and an early integration of these questions into the overall design is essential for good daylight planning. "Nowadays, solar protection is often used to prevent a room overheating, but at the same time the artificial light is switched on in order to achieve optimal lighting", calls Zöch a challenge in daylight

Velux Modular Skylights

In order to supply flat-roofed buildings with natural light, Velux, together with the architectural office Foster & Partners, has developed the Velux Modular Skylight System. "While many vendors offer tailor-made solutions, we are able to manufacture standardized elements that are easy to assemble on an industrial scale and consistently at a low price", emphasizes CEO Jørgen Tang-Jensen as a special feature of this solutions.



Healthy indoor climate: At the new headquarters of the logistics specialist DSV, 420 elements of the Velux modular skylight system ensure a high daytime intake and a natural air circulation. In the summer, roller blinds protect against too much solar radiation. Photo: Metzger

construction. An early communication between the architect, daylight planner and energy experts promotes appealing solutions without restricting the architect's creativity.

The solutions offered by Schlotterer and Hella show that sun protection and daytime temperatures are also compatible with one another. According to the company, the secret of the daylight retrofitting RetroLux from Schlotterer is in the two sections of its lamella and its special edging: the external part reflects the sun's rays into the sky and does not allow the heat to reach the window pane. The inward-oriented segment directs the diffuse daylight glare-free over the ceiling deep into the room. "The daylight control system helps to save energy for artificial lighting and cooling of the rooms", emphasizes Schlotterer CEO Peter Gubisch.

The second essential aspect of the Venetian blind is the continuous change in the slat angle over the curtain height. The slats are flatter in the upper part of the drawer so that a good horizontal transparency is ensured from the depth of the room. At the bottom, the slats gradually become steeper, so that good downward visibility is obtained near the window. "Transparency is an essential factor for well-being, which is often underestimated today", says Gubisch.

The result is a room flooded with daylight at a pleasantly temperature, with glare-free transparency. A joint research

project with the Paracelsus Medizinische Privatuniversität Salzburg (PMU) and the Neue Mittelschule Adnet shows that all these aspects have a positive effect on pupils' performance.

LESS STRESS, BETTER ABILITY TO CONCENTRATE

For the investigation, the researchers had equipped four school classes with comparable performance levels, similar spatial positioning and sunlight exposure with different shading systems. The result of the clinical study: For pupils of those classes, which were equipped with RetroLux daylight venetian blinds, stress and daytime sleepiness were reduced compared to the classes with conventional blackout systems. In addition, the pupils of these classes showed a faster work pace and stood out as having a better ability to concentrate. What's more, the RetroLux classes were able to cut electricity consumption by almost five percent.

With the AR92 S, Hella also offers a daylight-optimized slat. "Due to the concave-convex design, the stability is higher. The two parts retro-reflect the sun's rays outside (outer part) or distribute them inwards (internal curve)", explains Paul Hysek-Unterweger, Head of Communication at Hella. The result is a pleasantly adjustable distribution of daylight with a timeless design.

Matthias Metzger

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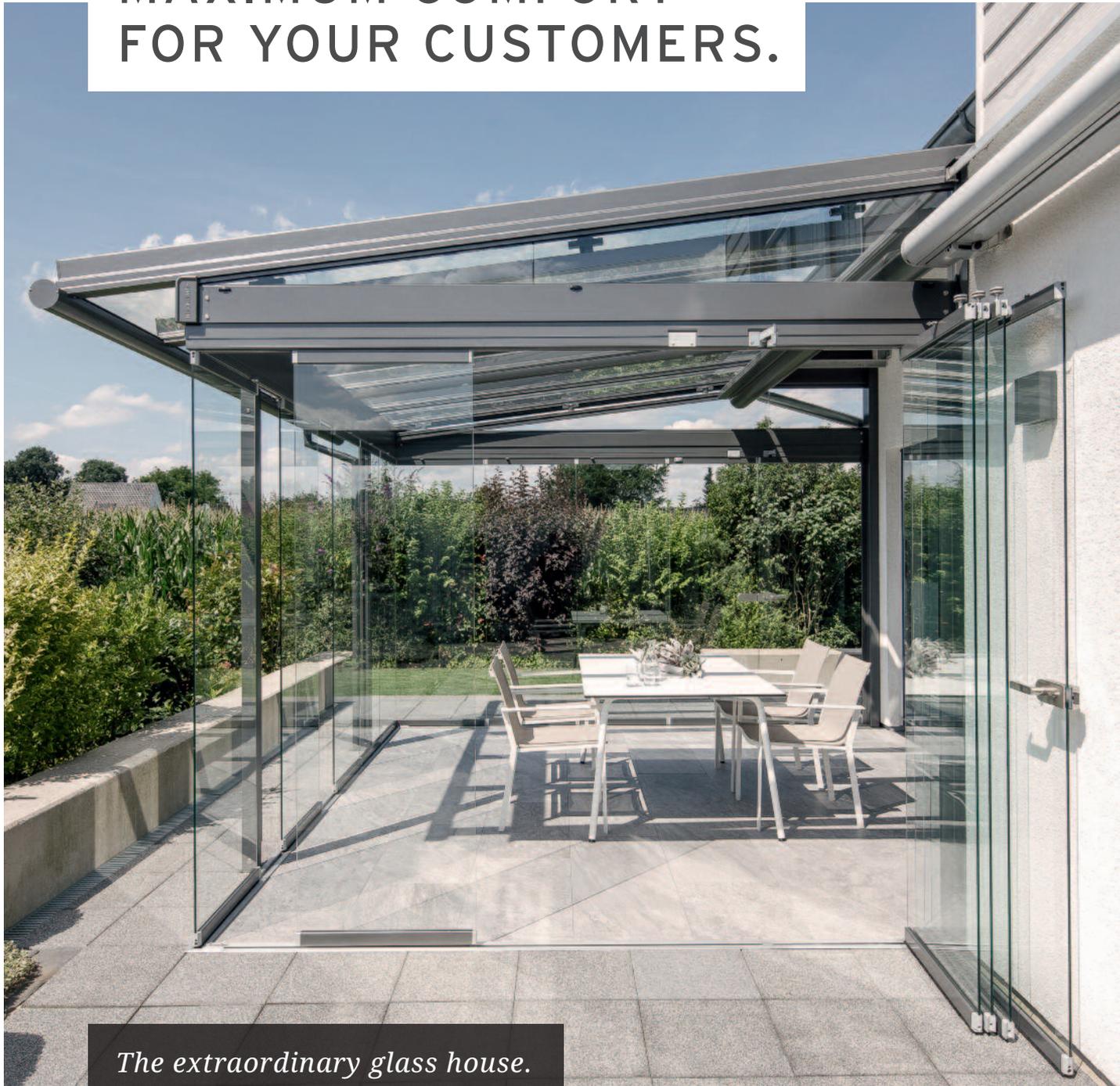
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