

## IC Market Tracking Outdoor Sun Protection in Europe 2017

- Awnings
- Roller Shutters
- Outdoor Venetian Blinds
- Window Shutters

- ✓ Overview of the development of the **total market** and the **individual segments**.
- ✓ **Market forecasts** for all product segments and regions for the upcoming three years, based on our econometric models.
- ✓ Awareness of **market position** and development during the last two years, in comparison with major competitors and with respect to:
  - Total market
  - Countries and regions
  - Product groups and segments
  - Distribution channels
- ✓ Information about the most important **factors of influence**
- ✓ Graphic presentation of the results facilitates the development of your own strategies.





## Roller Shutters in Europe

- Germany
- Italy
- Austria
- France
- Spain
- Switzerland
- Poland



- Product Groups
- Assembled Systems
- Profiles



- Material
- PVC
- Aluminium
- Other Types

- Distribution
- Industry
- Direct
- Indirect

- Customer Segment
- Residential
- Non-residential

- Installation
- Front Mounted
- Top Mounted
- Other Types

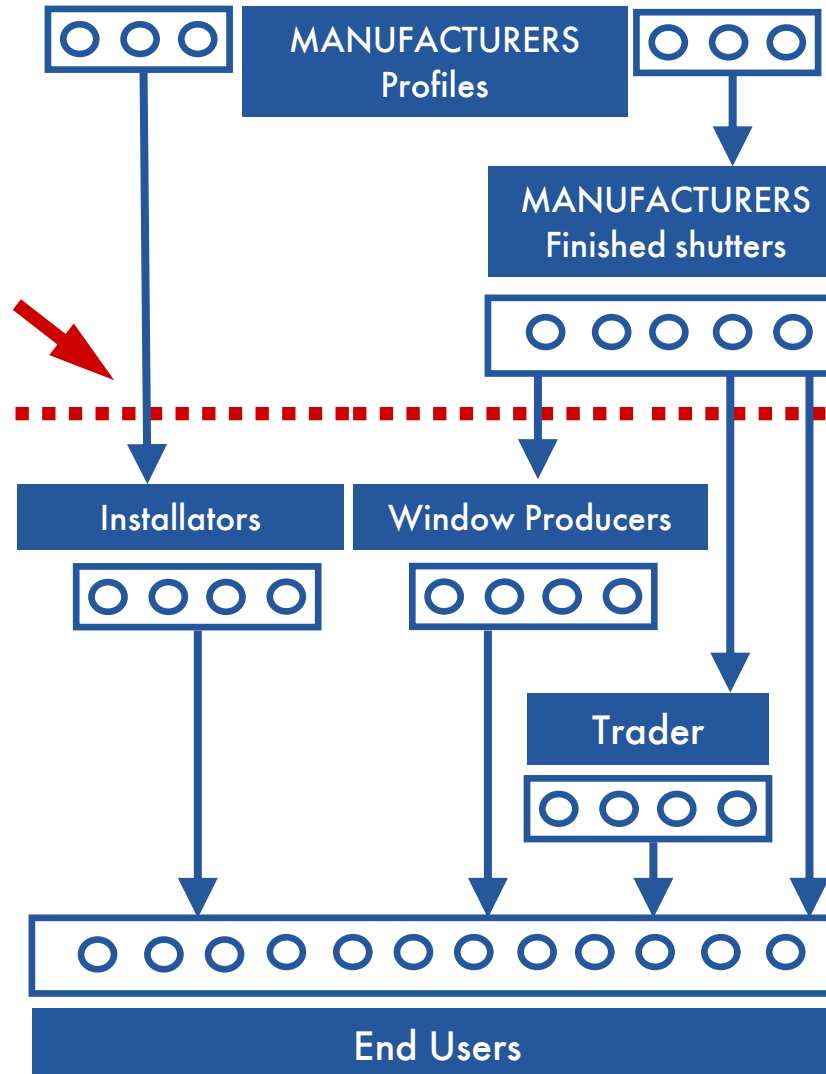
- Motorization
- Motorized
- Non-motorized

For each segment the total market for 2012-2020 (2017-2020 as a forecast) will be shown as well as market shares for the top players for 2016-2017 in total and per relevant segments.

# What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised traders act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

# Definition and Demarcation

## Materials

Turnover is stated in Mio. Euro. Values are always Net-Turnovers (No List-Prices), discounts included.

The sold quantity is stated in units (1 unit = 1,3m \* 1,3m = 1,69 m<sup>2</sup>) as defined by the German Association of window and façade producers. The quantities sold by companies that use other units (square meters, windows in units) are converted into the defined standards. Therefore there could be discrepancies between secondary sources (e.g. Internet) and the quantities stated in the study.

### PVC

Roller Shutters and Venetian Blinds with lath made of PVC (Plastic)

### Aluminium

Roller Shutters and Venetian Blinds with lath made of Aluminium

### Others

Roller Shutters with lath made of other materials (Wood, Steel, etc.)



**Not included: Textile Roller Shutters**



## Motorization

Electrically Operated

With a tubular motor fitted within the roller. Automatic operation can be added.

Manually Operated

Without a tubular motor

## Product Type

Front Mounted

Describes the type where the roller shutter box is fixed to the exterior of the building facade.

Top Mounted

Where the roller shutter box is built into the lintel above the window.

Others

Other types of mounting systems.

## Abbreviations

CAGR

Compound Annual Growth Rate over the period 2014 - 2017

Avg. Share

Average Share over the period 2014 - 2017

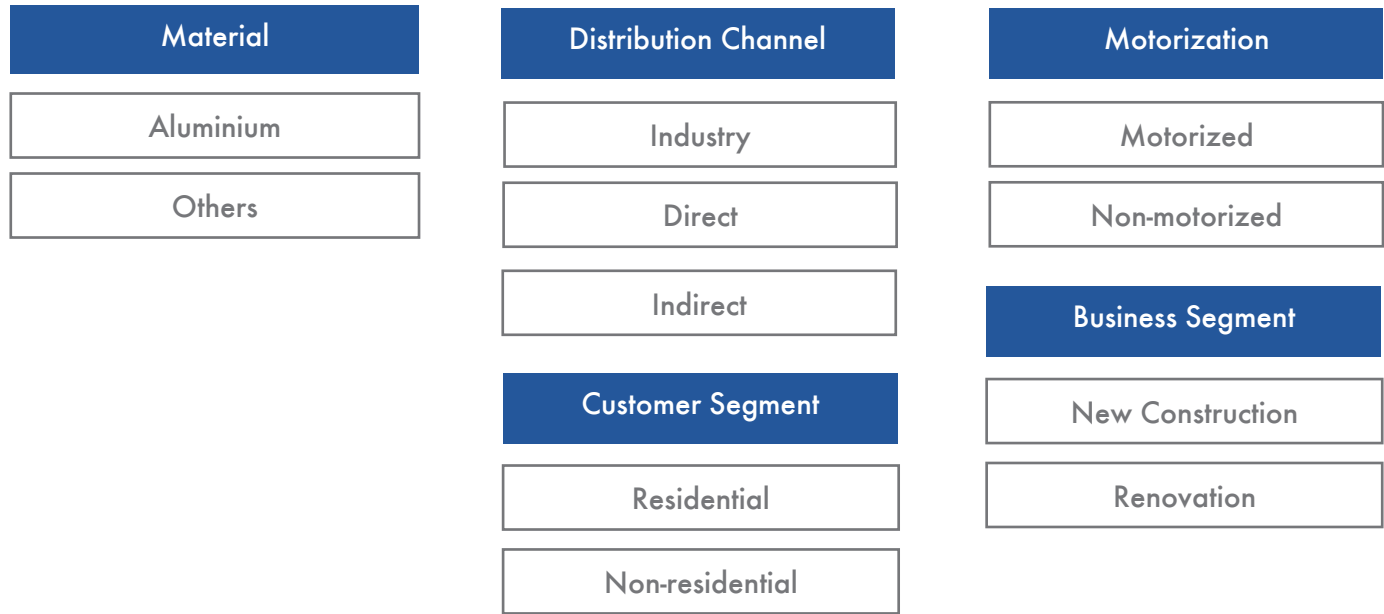
2014e/2017f

Estimated/Forecasted



## Outdoor Venetian Blinds in Europe

- Germany
- Italy
- Austria
- France
- Spain
- Switzerland
- Poland

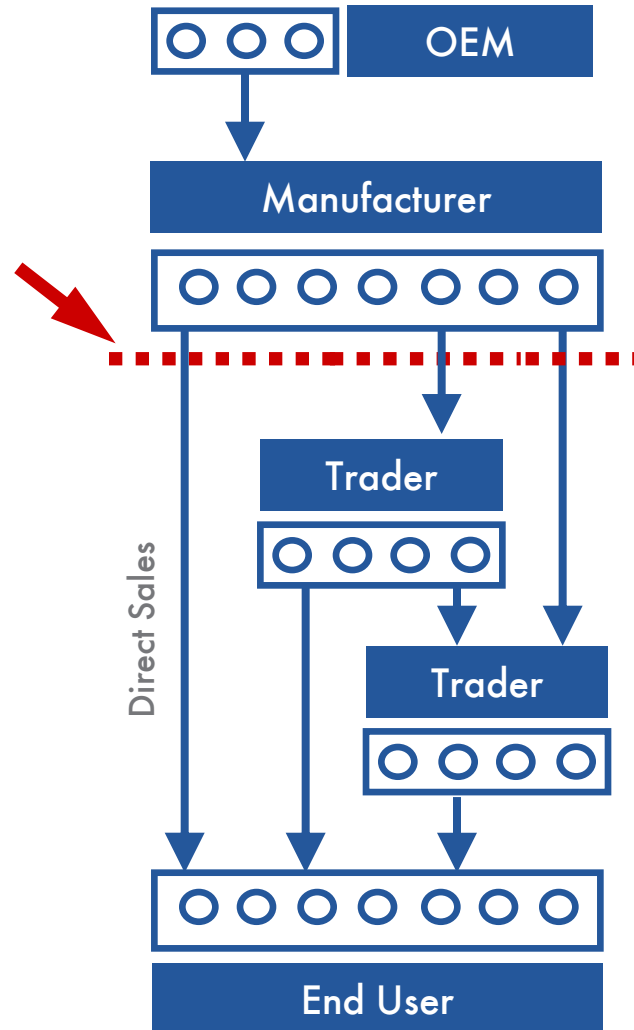


For each segment the total market for 2012-2020 (2017-2020 as a forecast) will be shown as well as market shares for the top players for 2016-2017 in total and per relevant segments.

# What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised traders act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.



# Definition and Demarcation

## Materials

Turnover is stated in Mio. Euro. Values are always Net-Turnovers (No List-Prices), discounts included.

The sold quantity is stated in units (1 unit = 1,3m \* 1,3m = 1,69 m<sup>2</sup>) as defined by the German Association of window and façade producers. The quantities sold by companies that use other units (square meters, windows in units) are converted into the defined standards. Therefore there could be discrepancies between secondary sources (e.g. Internet) and the quantities stated in the study.

PVC

Roller Shutters and Venetian Blinds with lath made of PVC (Plastic)

Aluminium

Roller Shutters and Venetian Blinds with lath made of Aluminium

Others

Roller Shutters with lath made of other materials (Wood, Steel, etc.)



**Not included: Textile Roller Shutters**



## Motorization

Electrically Operated

With a tubular motor fitted within the roller. Automatic operation can be added.

Manually Operated

Without a tubular motor

## Product Type

Front Mounted

Describes the type where the roller shutter box is fixed to the exterior of the building facade.

Top Mounted

Where the roller shutter box is built into the lintel above the window.

Others

Other types of mounting systems.

## Abbreviations

CAGR

Compound Annual Growth Rate over the period 2014 - 2017

Avg. Share

Average Share over the period 2014 - 2017

2014e/2017f

Estimated/Forecasted



## Awnings in Europe 2017

- |         |       |         |         |       |             |        |
|---------|-------|---------|---------|-------|-------------|--------|
| Germany | Italy | Austria | Benelux | Spain | Switzerland | France |
|---------|-------|---------|---------|-------|-------------|--------|



| Product Groups       |                        | Distribution Channel | Level of Motorisation | Customer Segment |
|----------------------|------------------------|----------------------|-----------------------|------------------|
| Retractable Awnings  | Window/Facade Awnings  | Direct               | Motorized             | Residential      |
| Cross Arm            | ZIP Screens            | Indirect             | Hand operated         | Non-Residential  |
| Patio Awnings        | Other Vertical Systems | Industry             |                       |                  |
| Pergola Systems      | Other Types of Awnings |                      |                       | Business Segment |
| Conservatory Awnings | Others                 |                      |                       | New Construction |
| Stationary awnings   |                        |                      |                       | Renovation       |

For each segment the total market for 2012-2020 (2017-2020 as a forecast) will be shown as well as market shares for the top players for 2016-2017 in total and per product group.



## Product Groups

Turnover is stated in Mio Euro. Values are always Net-Turnovers (No List-Prices), discounts included

### Cross Arm Awnings

Cross arms are pushing the fabric away from the fabric roll. Optionally a cassette can protect the closed awning from weather influences.

### Pergola Systems

The awning ends on a stand (Pergola) made out of aluminum or wood serving as a sturdy protection against wind and weather.

### Vertical (ZIP) Screens

The fabric runs down vertically on two rails as window coverings. They are also named as ZIP-screens.

### Other Vertical Systems

It includes all types of vertical systems for window or facade coverings, as, in particular, drop arm systems where two mounted drop arms are pushing the awning away from the building. It also includes the markisolette type.

### Stationary Awnings

Two stationary rails are guiding the fabric, even over edges if desired. The fabric is only one piece and can be blended.

### Others

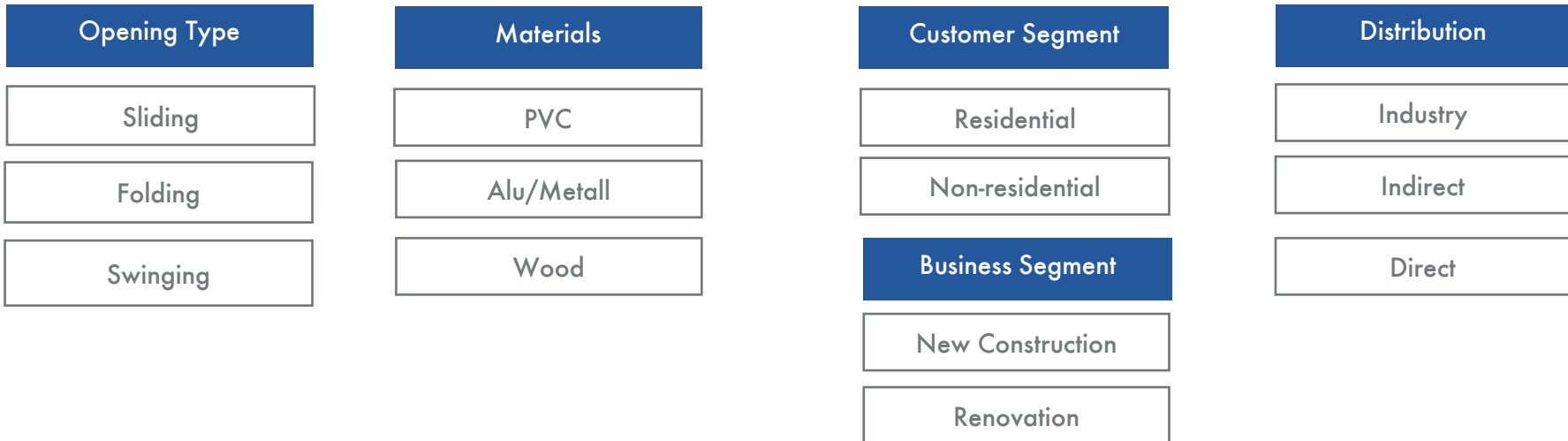
Other kinds of awnings and textile systems (excl. Sails)





## Window Shutters in Europe 2017

- Germany
- Italy
- Austria
- France
- Spain
- Switzerland



For each segment the total market for 2012-2020 (2017-2020 as a forecast) will be shown as well as market shares for the top players for 2016-2017 in total and per product group.



## Opening Types

Swinging Shutters



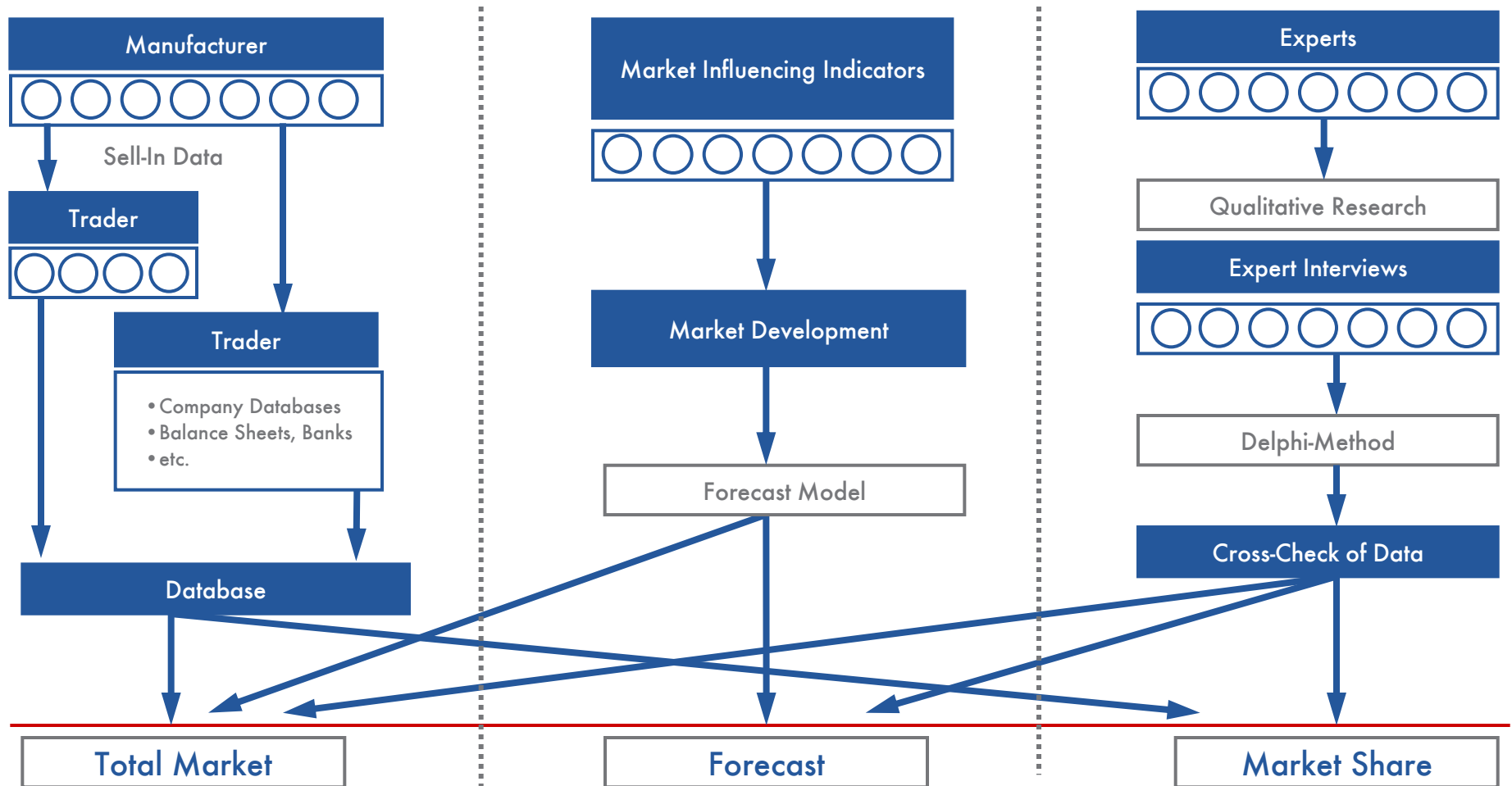
Folding Shutters



Sliding Shutters



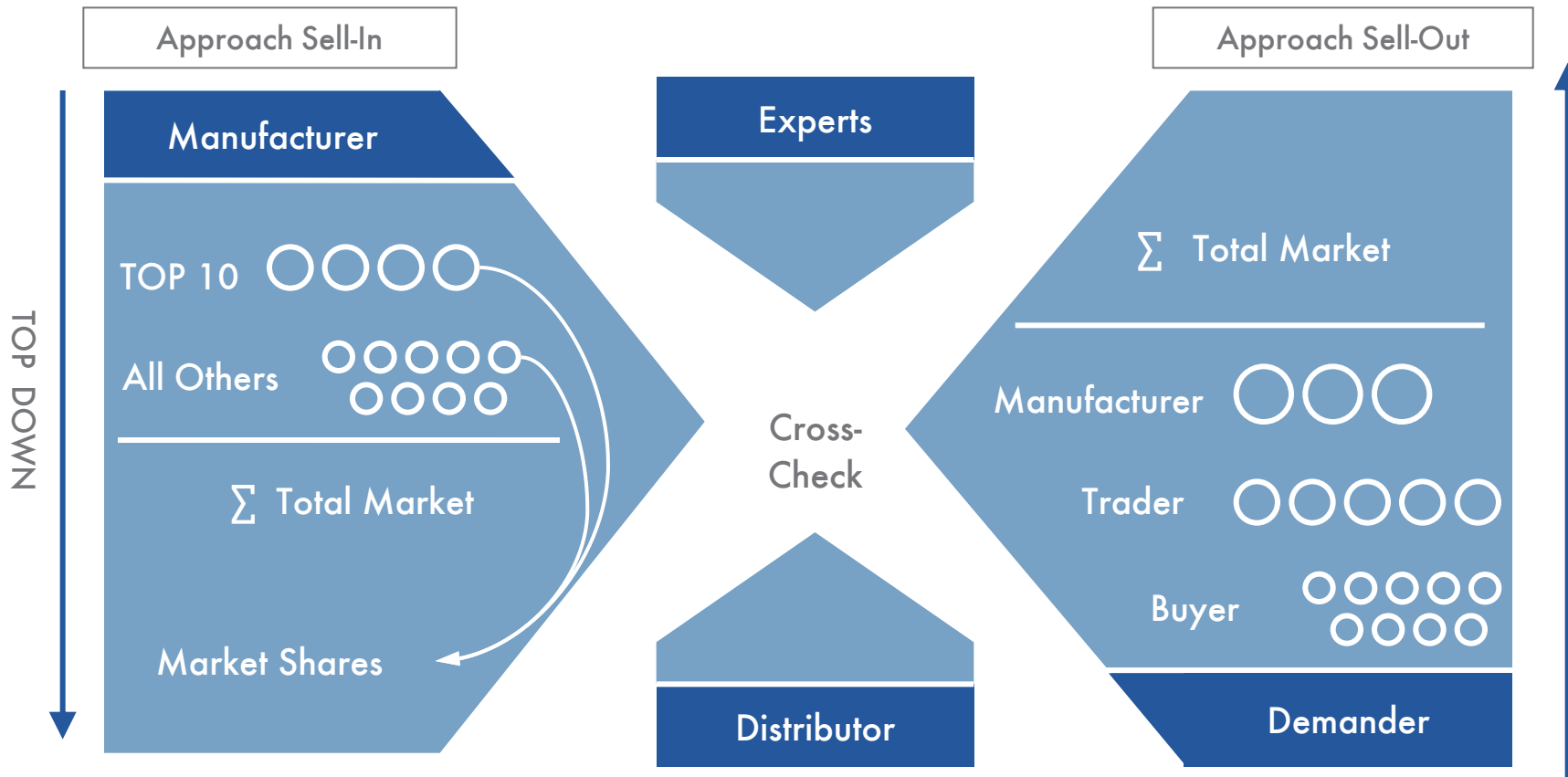
# Base of Primary Research by Manufacturers & Experts



# Data of Manufacturers Aligned with Market Calculations


Description Structure of Survey Methodology

Methodology





# Investment Plan for Your Market Research

|           |                | Scale of Discount<br>from a buying price of                                       |               |
|-----------|----------------|---|---------------|
| Europe**  | Subscription   | Single Issue  | € 5.000 -10%  |
|           | Single Country |  | € 13.400,-    |
| € 2.950,- |                |   | € 10.000 -25% |
|           |                |   | € 15.000 -30% |
|           |                |   | € 20.000 -35% |

- Countries**
- GER
  - AT
  - ESP
  - FR
  - IT
  - CH
  - POL

\* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

\*\*Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

# Investment Plan for Your Market Research

|                 |  |                     |  |      |
|-----------------|--|---------------------|--|------|
|                 |  |                     | <b>Scale of Discount</b><br>from a buying price of |      |
|                 | <b>Subscription</b>                            | <b>Single Issue</b> |  |      |
| <b>Europe**</b> | <b>IC SUBSCRIPTION<br/>20% PRICE ADVANTAGE</b> | € 13.400,-          | € 5.000  | -10% |
| Single Country  |  | € 2.950,-           | € 10.000   | -25% |
|                 |  |                     | € 15.000   | -30% |
|                 |  |                     | € 20.000   | -35% |

|                  |     |    |     |    |    |    |     |
|------------------|-----|----|-----|----|----|----|-----|
| <b>Countries</b> | GER | AT | ESP | FR | IT | CH | POL |
|------------------|-----|----|-----|----|----|----|-----|

\* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

\*\*Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

# Investment Plan for Your Market Research



## Scale of Discount from a buying price of

|          |      |
|----------|------|
| € 5.000  | -10% |
| € 10.000 | -25% |
| € 15.000 | -30% |
| € 20.000 | -35% |

\* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

\*\* Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

# Investment Plan for Your Market Research

|                 |                |              |              |     |    |     |  |
|-----------------|----------------|--------------|--------------|-----|----|-----|--|
| Window Shutters | Europe **      | Subscription | Single Issue |     |    |     | <b>Scale of Discount</b><br>from a buying price of |
|                 | Single Country |              |              | GER | AT | ESP |  |
|                 |                |              | € 12.250,-   |     |    |     | € 5.000 -10%                                       |
|                 |                |              | € 2.950,-    | FR  | IT | CH  | € 10.000 -25%                                      |
|                 |                |              |              |     |    |     | € 15.000 -30%                                      |
|                 |                |              |              |     |    |     | € 20.000 -35%                                      |

IC SUBSCRIPTION  
20% PRICE ADVANTAGE

\* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

\*\* Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

# Your Advantages as a Subscription Customer

Please choose between Subscription\*  
or Single issue

**Subscription\***  **Single Issue**

*As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to the following benefits:*


- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**
- **Annually updated reports** on fixed dates
- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)
- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily

- Interconnection is the leading institute for market data in the furniture industry.
- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



# Our Market-Intelligence Tools

### Market Analysis




- Market Volume
- Market Shares & Entry
- Competition Analysis

### Distribution Analysis



- Channel Map
- Distribution Matrix
- Margins

### Customer Insight




- Focus Groups
- Buying Motives
- Customer Benefits

### Market Forecasts




- Indicator Models
- Life Cycle Models
- Econometric Analysis

### Brand Analysis




- Brand Scorecards
- Brand - Triangle
- Brand Affinity

### Customer Satisfaction




- Importance/Satisfaction Portfolios
- Customer Loyalty
- Customer Typology

### Price Research



- Price-Sales-Function
- Price-Simulation-Tool
- Optimal Pricing

### Web**verstärker**



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

If there are any questions please  
do not hesitate to contact us!

**Interconnection Consulting**  
Getreidemarkt 1, A-1060 Wien

**Dr. Stefano Armandi – Market Analyst**

Tel: +43 1 5854623 -54

Fax: +43 1 5854623 -30

[armandi@interconnectionconsulting.com](mailto:armandi@interconnectionconsulting.com)

**Dr. Frederik Lehner – Managing Director**

Tel: +43 1 5854623 -11

Fax: +43 1 5854623 -30

[lehner@interconnectionconsulting.com](mailto:lehner@interconnectionconsulting.com)

Interconnection Consulting  
Vienna • Bratislava • Lviv • Buenos Aires • Oberstdorf

[www.interconnectionconsulting.com](http://www.interconnectionconsulting.com)



we show you the way



FAX: +43 1 585 46 23 30

E-Mail: office@interconnectionconsulting.com



## Yes, we would like to order the following market reports IC Market Tracking® Outdoor Sun Protection in Europe 2017

(Please print out the order form and mark your desired countries for the report)

|                                       |                         |                          |
|---------------------------------------|-------------------------|--------------------------|
| <b>IC MT Sun Awnings</b>              | <b>Single Issue</b>     | <b>Subscription*</b>     |
| <input type="checkbox"/> Austria      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Germany      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Italy        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Benelux      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Spain        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Switzerland  | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> France       | € 2.950                 | € 2.360                  |
| <br><b>IC MT Roller Shutters</b>      | <br><b>Single Issue</b> | <br><b>Subscription*</b> |
| <input type="checkbox"/> Austria      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Germany      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Italy        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> France       | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Spain        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Switzerland  | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Poland       | € 2.950                 | € 2.360                  |
| <br><b>IC Outdoor Venetian Blinds</b> | <br><b>Single Issue</b> | <br><b>Subscription*</b> |
| <input type="checkbox"/> Austria      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Germany      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Italy        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> France       | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Spain        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Switzerland  | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Poland       | € 2.950                 | € 2.360                  |
| <br><b>IC Window Shutters</b>         | <br><b>Single Issue</b> | <br><b>Subscription*</b> |
| <input type="checkbox"/> Austria      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Germany      | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Italy        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> France       | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Spain        | € 2.950                 | € 2.360                  |
| <input type="checkbox"/> Switzerland  | € 2.950                 | € 2.360                  |

# Order Form

- Subscription \*
- Single Issue
- We would like to order ..... additional hard copies, each for € 150.
- Translation in another language (price on request)

\*\* ) Annual Price; The Subscription is valid for at least two years (order year and the following year) and can be cancelled after the second year, no later than 31.12 in the year in which the last report has been received. If the subscription is not cancelled it continues automatically for the next year. Changes of prices must be announced by Interconnection at the latest 6 weeks before the end of the year. All prices shown exclude sales tax.

|                   |     |
|-------------------|-----|
| Scale of Discount |     |
| > From € 5,000    | 10% |
| > From € 10,000   | 25% |
| > From € 15,000   | 30% |
| > From € 20,000   | 35% |

**Billing Address:** (Please fill in the data completely)

Company: \_\_\_\_\_

First Name: \_\_\_\_\_

Surname \_\_\_\_\_

Adress: \_\_\_\_\_

Post code/Zip: \_\_\_\_\_

Country: \_\_\_\_\_

VAT identification number \_\_\_\_\_

E-Mail \_\_\_\_\_

**Delivery Address:** (only necessary if different from the Billing address )

Company: \_\_\_\_\_

First Name: \_\_\_\_\_

Surname \_\_\_\_\_

Adress: \_\_\_\_\_

Post code/Zip: \_\_\_\_\_

Country: \_\_\_\_\_

Payable after receipt of invoice without discount. General terms of business apply, as agreed; any disputes arising will be settled before a competent Vienna court of law. We claim copyright protection for the work. Distribution to third parties, duplication, publication or revision, even in part, is not permitted. In case of violation the company or persons placing the order agree to pay a contract penalty of one hundred thousand Euros in each case.

Date

Name

Signature