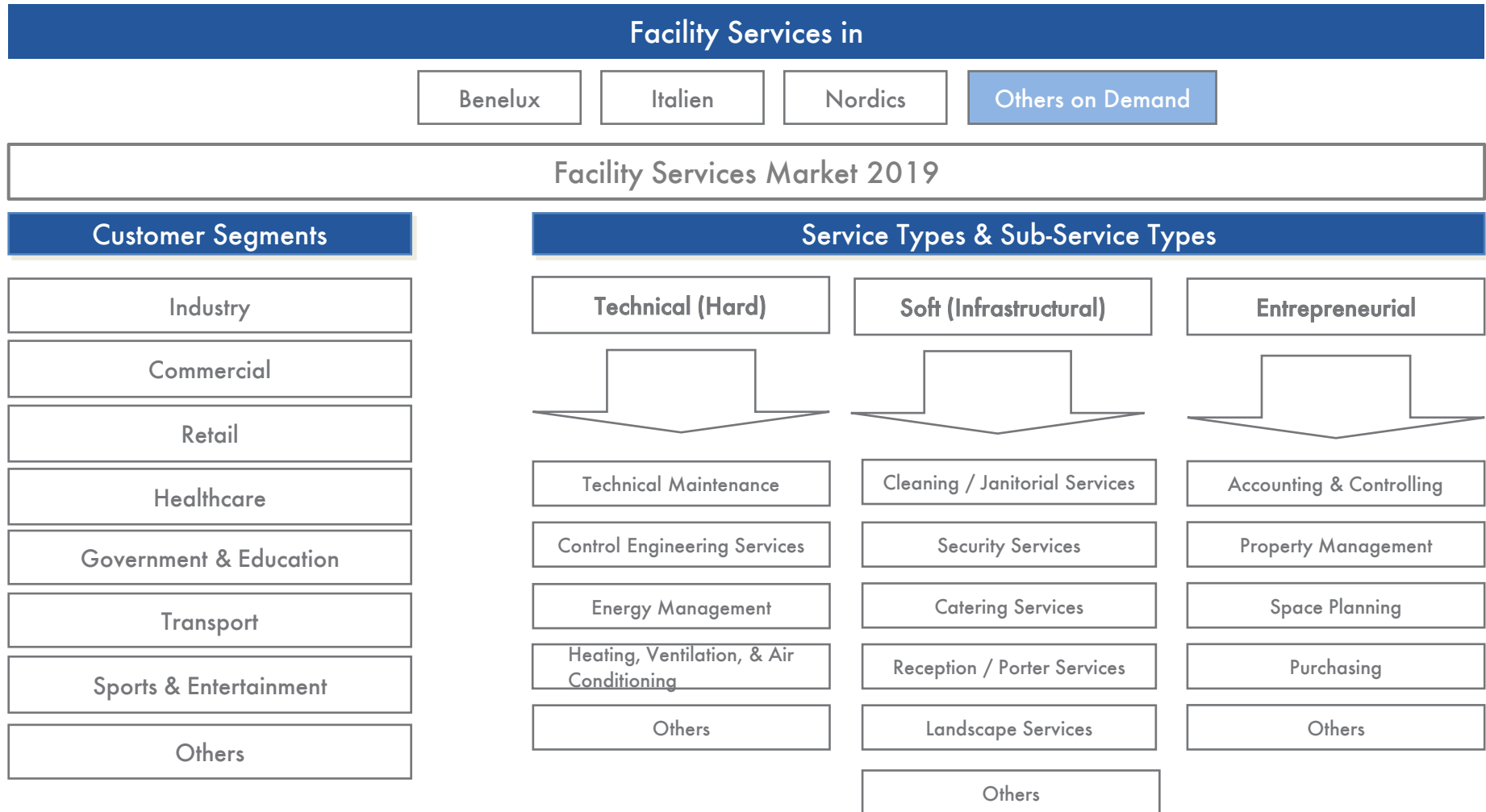


IC Market Tracking  
Facility Services in  
Europe 2019

# Your Benefits at a Glance

- ✓ 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.
- ✓ **Market Shares** and development of Top Players in the last two years and with respect to:
  - Total Market
  - Service Types: Technical FM, Entrepreneurial FM, Infrastructural FM
  - Customer Segments
- ✓ Information about the most important **Market Drivers**
- ✓ Overview of **Development of Segments** and **Market Positioning**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.
- ✓ Pivot (excel tables) with company market shares by country, regions and segments for an interactive research.





For all segments the „external Facility Services Market“ is used as a basis. However we also provide information, how big the overall total market (internal +external services) is.

## Service Types

Technical (Hard)

HVAC, Controls & Automation, Electrical Engineering, Energy Management, Technical Maintenance, etc.

Soft

Janitorial Services, Cleaning, Security, Catering, Waste Disposal, Snow Removal, Pest Control, Landscaping, etc.

Entrepreneurial

Controlling, Property Management, Logistics, Space Planning, etc.

## Abbreviations

CAGR

Compound Annual Growth Rate over the period 2016 - 2020f

Avg. Share

Average Share over the period 2016 - 2020f

2016e/2019f

Estimated/Forecasted

Turnover

Turnover is stated in 1 Mio. Euros. Values are always net turnover values (not list-prices), including rebates.

## Types of Agreement

Individual Contract

Contract for one individual Service

Vertical Contract

Contracts for several Services within one service group (i.e. technical)

Horizontal Contract

Contracts for 2 different service types

Complete Contract

Contract for all 3 service types

## Contract Types

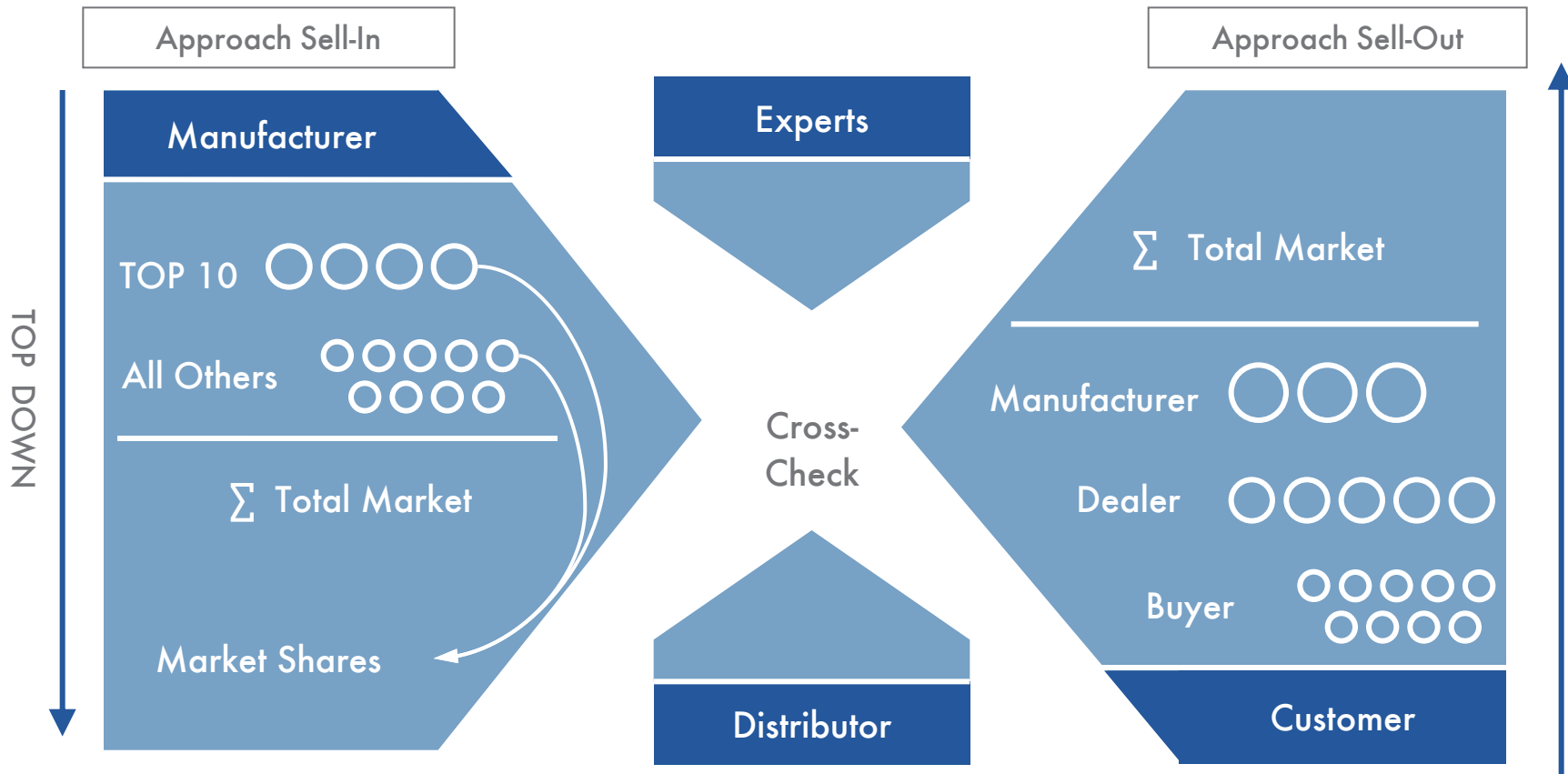
Internal

Own company

External

Subcontracting

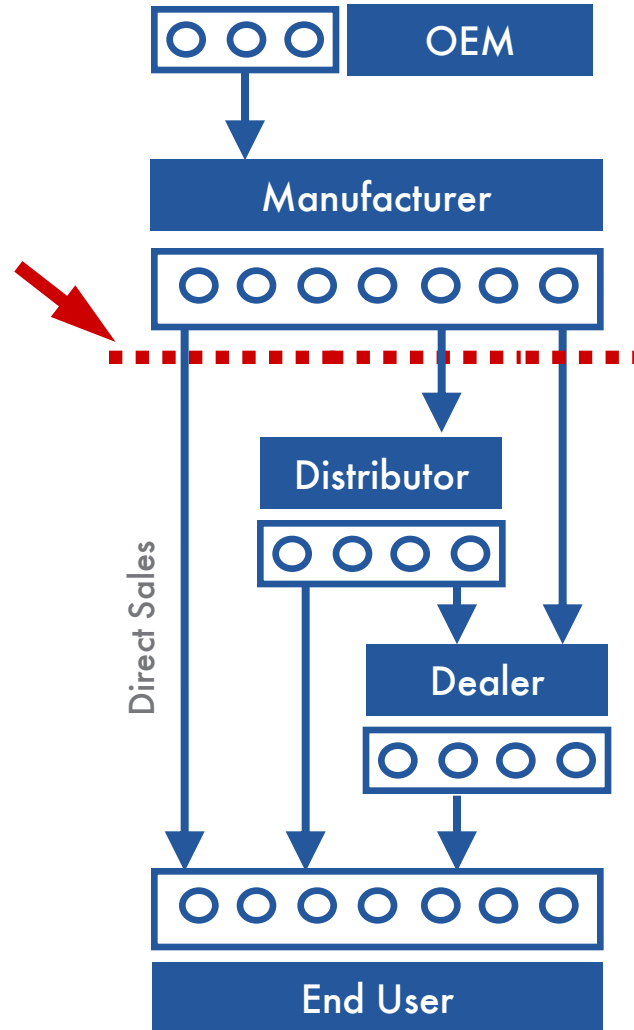
# How Do we Cross Check the Data?



# 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.



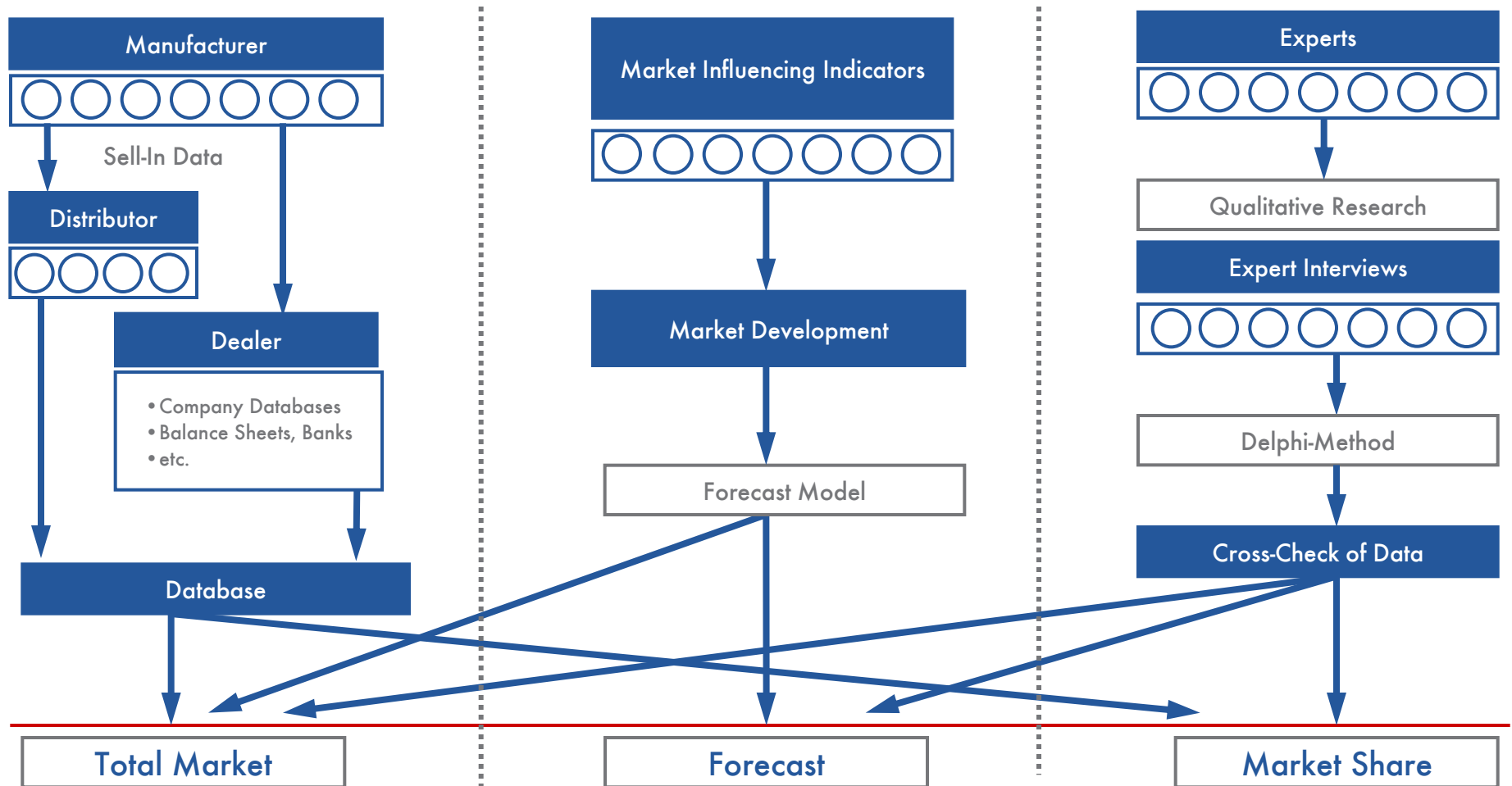
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

# How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology

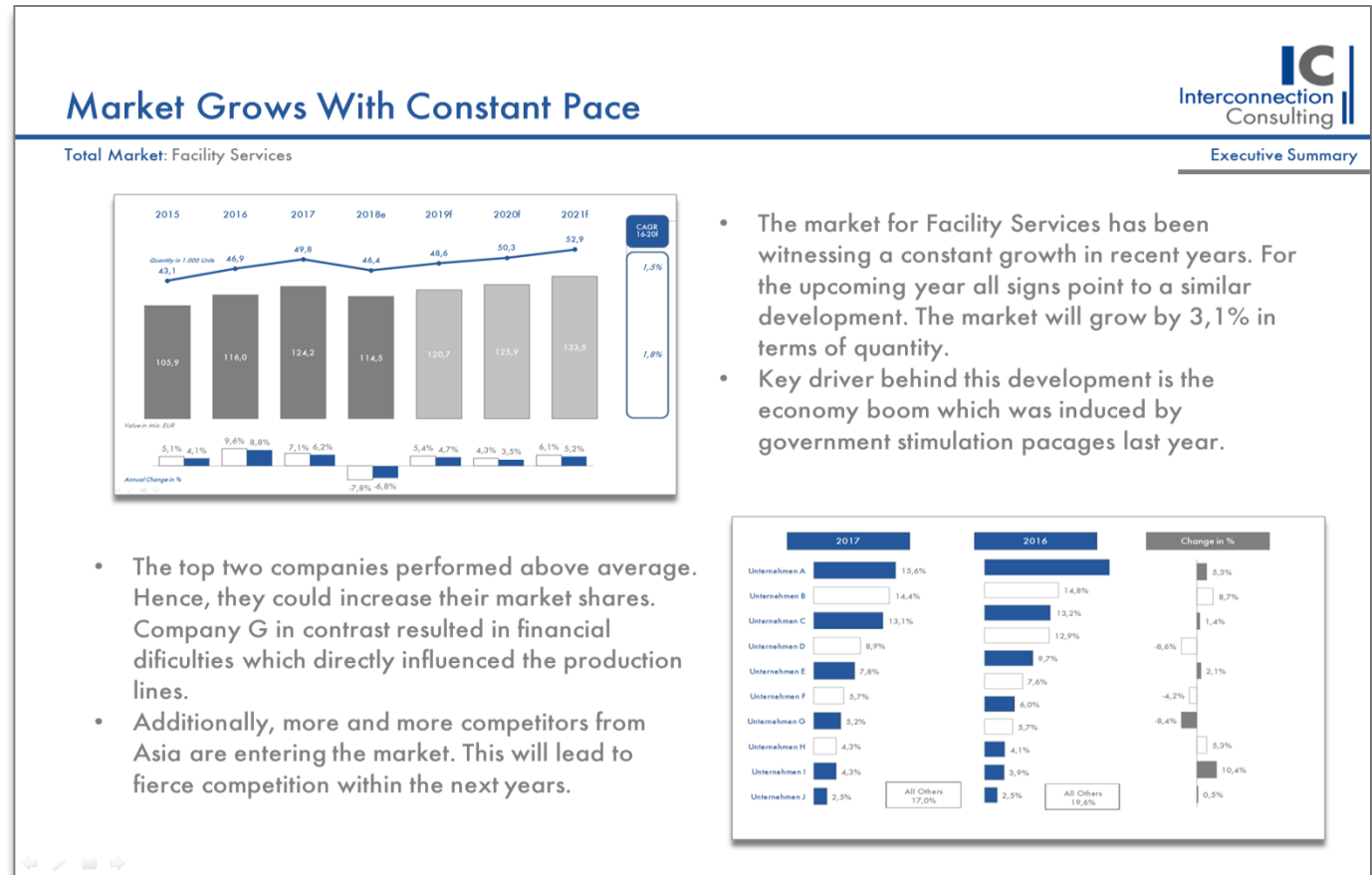


*The IC Market Tracking® is modularly built and consists of the following sections:*

- The **Introduction** shows the definition and demarcation of services, sub services, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market of facility services are analysed in the **Economic Environment**: You will find the most important data on construction, commercial sector etc.. As well the main economic indicators influencing the market.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as, services, sub services, regions and product groups. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies within the facility services market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- By using several analytical tools, we also carry out a **Strategy Analysis**: We show the strategic position through Efficiency-portfolios, BCG-Portfolios, Interconnection Dynamic-Portfolios, etc. Thus you can evaluate the strategic position of the main competitors at a glance.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results.

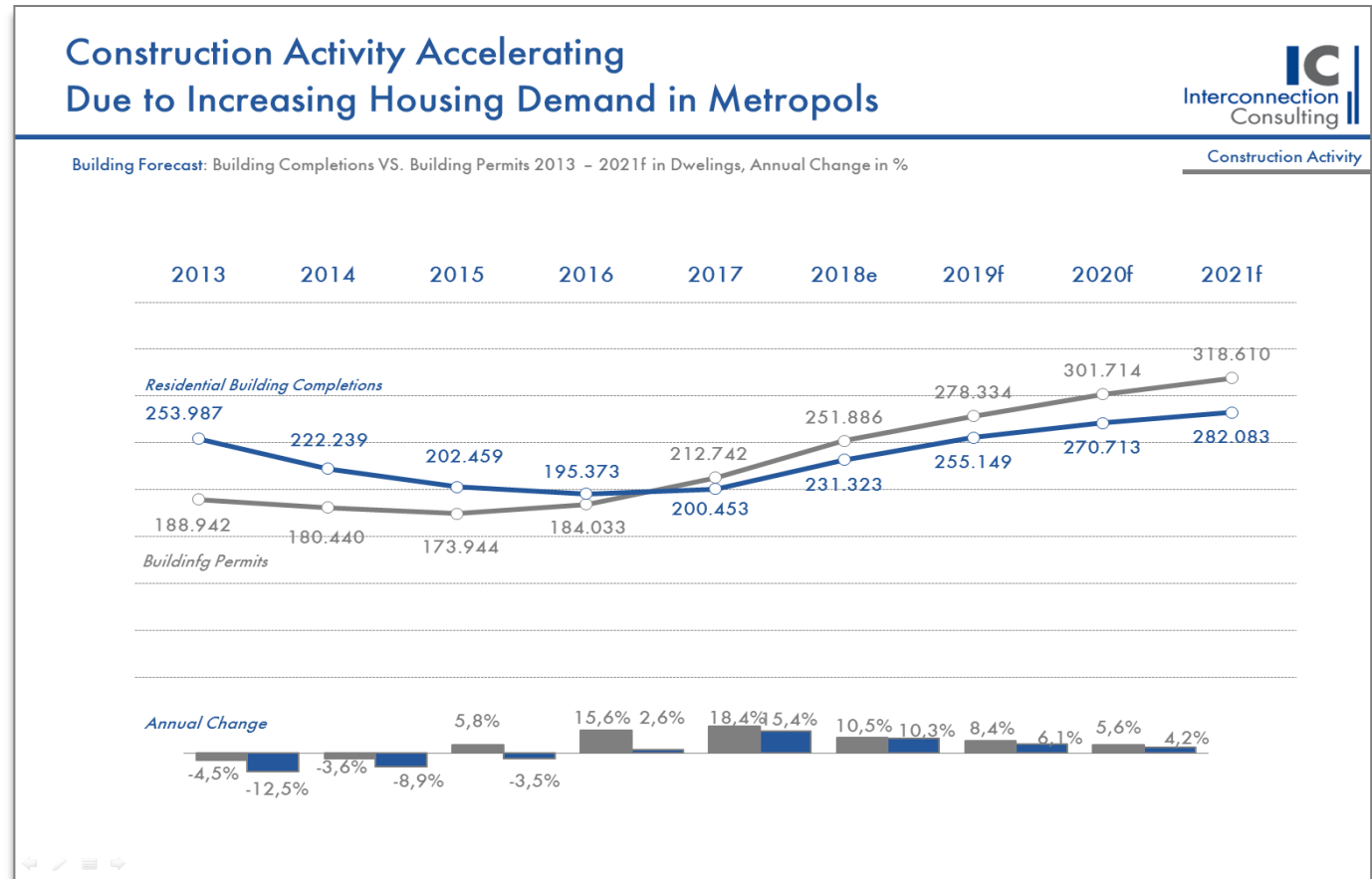


- The executive summary comprises all relevant information of the report in precise manner. Forecast and
- competition situation is highlighted
- *This chart shows dummy figures.*



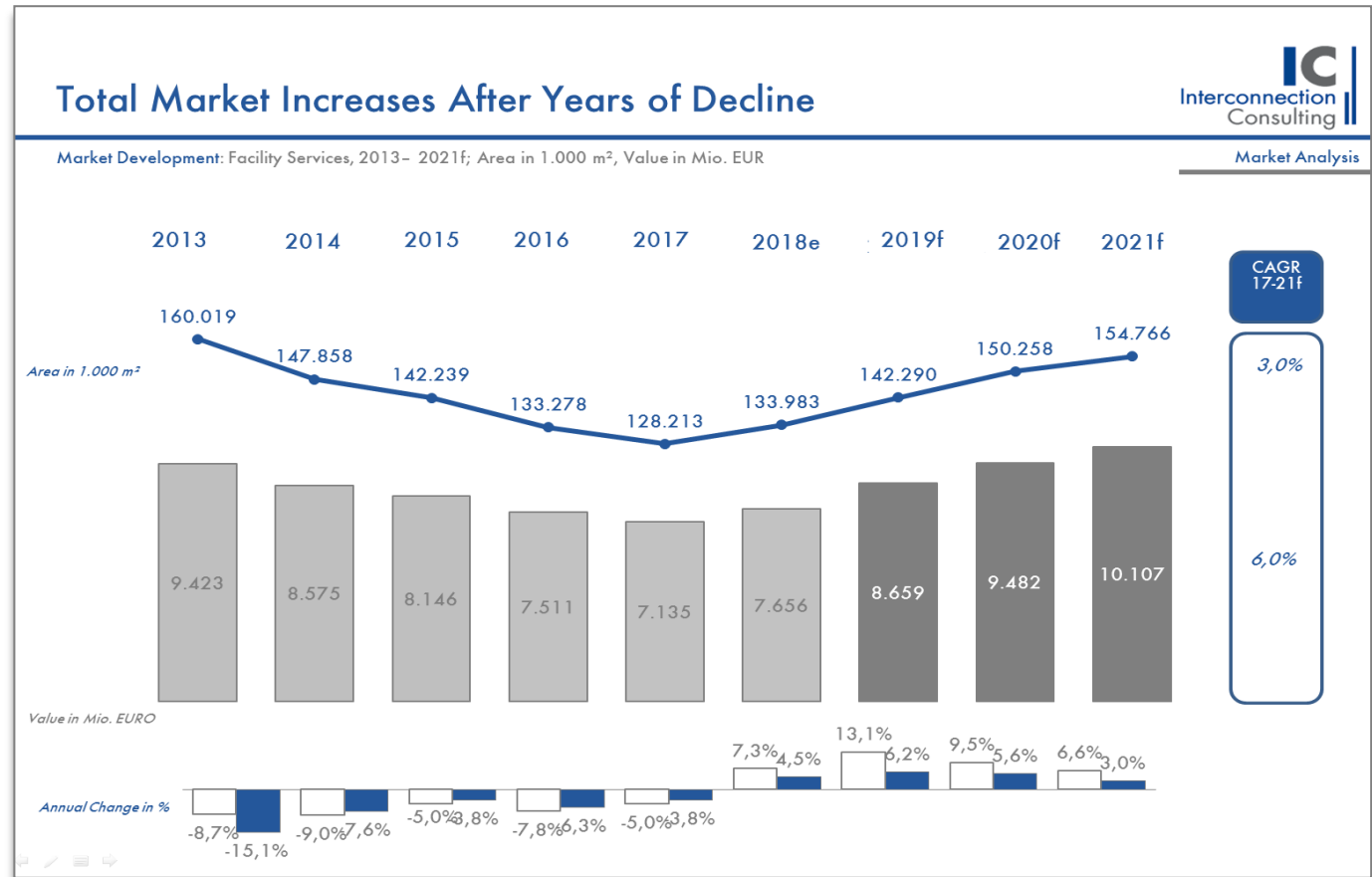
# Market Environment Data of Our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows sample figures.*

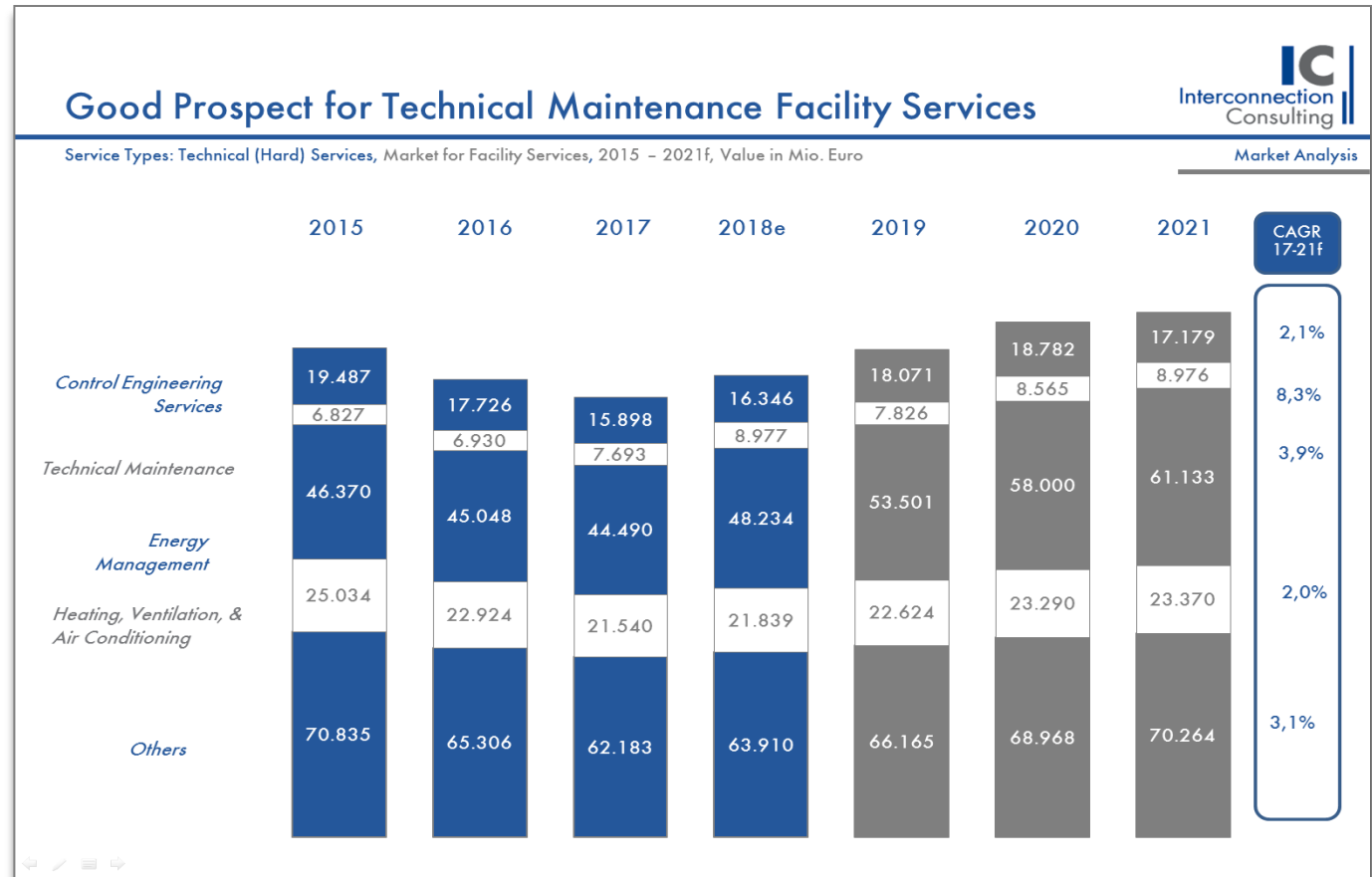


# Total Market Development and Forecast

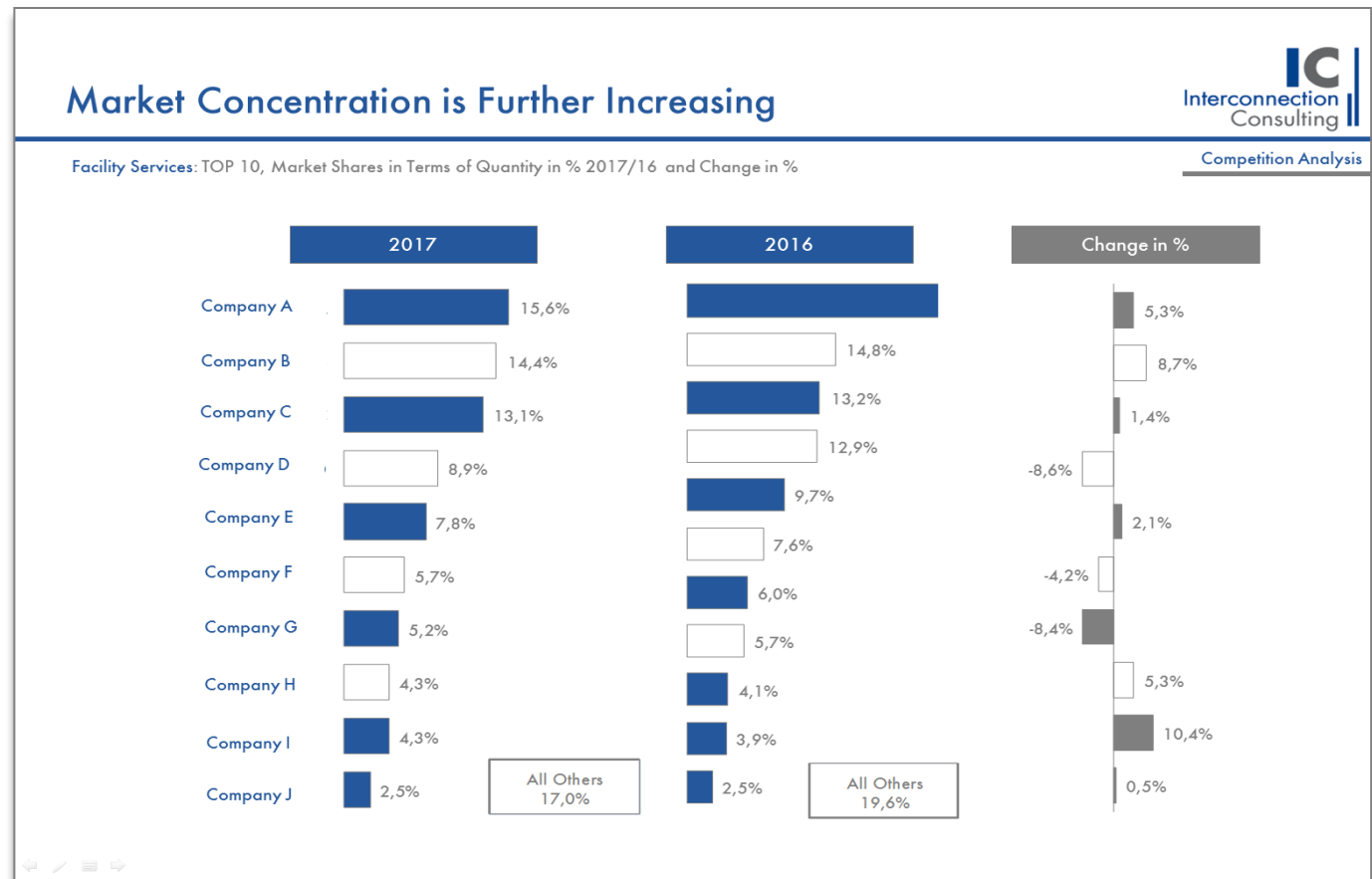
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*



- Additionally to the visualised report a Pivot Table will be included
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

## How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	<b>A</b>
Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	
Segments	Results
<b>Segment A</b>	18.592
<b>Segment B</b>	8.434
<b>Segment C</b>	5.310
<b>Segment D</b>	3.290
<b>Segment E</b>	1.332
<b>Total</b>	<b>36.958</b>

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
<b>Segment A</b>	3.290	5.452	7
<b>Segment B</b>	5.310	8.925	21
<b>Segment C</b>	8.434	10.794	
<b>Segment D</b>	18.592	14.624	13
<b>Segment E</b>	1.332	2.229	6
<b>Total</b>	<b>36.958</b>	<b>42.025</b>	<b>47</b>

	IC Subscription*	Single Issue	
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	Denmark	Finland	
	Norway	Sweden	

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- **Easy termination**: After 2 issues each subscription can be terminated easily




# Interconnection Delivers Data for Company Decisions

- Interconnection is one of the leading institutes for market data.
- 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

## Webverstärker



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

*"IC is a permanent partner of ours and provides helpful data for decisions."*

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



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

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