IC Interconnection Consulting

IC Market Tracking
Prefabricated Houses in Germany and Austria 2020

www.interconnectionconsulting.com

IC Market Tracking®
Prefabricated Houses in Germany and Austria 2020

Interconnection Consulting

Benefit	Page 03
Market Structure	Page 04
Definitions	Page 06
Methodology	Page 09
IC Cockpit	Page 12
Prices	Page 14
References	Page 17
Contact	Page 18

Your Benefits at a Glance

- ✓ You will receive an overview of the **overall market** in addition to **individual market segments.**
- ✓ A detailed **representation of the key markets by country and forecasting until 2023** based off of our econometric forecast model.
- ✓ **A competition analysis** containing detailed **market shares** in terms of:
  - Total Market
  - Building Type
  - Building Stage
  - Price Ranges
  - Construction Method
  - Energy Efficiency
  - Regions
  - Distribution Channel
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.

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Prefabricated Houses in Germany and Austria 2020

IC-Market Tracking® Prefabricated Houses in Germany 2020

Market by...

Building Stage	Building Type	Price Ranges	Construction Method	Energy Efficiency	Regions	Distribution Channel	Benchmarks
Shell-Finish	One-Family Houses	<150.000 €	Timber Frame	Passive Houses	North	Show Home Parks*	Avg. m²/House
Floor Covering	Two-Family Houses	150.000 – 250.000 €	Solid Construction	Rest	East	Direct	Avg. Price/m²
„Turn-Key"	Row Houses	>250.000 €			West	Indirect	
	Residential Buildings				South-East		
					South-West		

Segment analyzed in terms of value and quantity

Segment analyzed only in terms of quantity

For all represented segments we show the total market and a forecast up to 2023, as well as market shares of the top players for the last two years.

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Prefabricated Houses in Germany and Austria 2020

IC-Market Tracking® Prefabricated Houses in Austria 2020

Market by...

Building Stage	Building Type	Price Ranges	Construction Method	Energy Efficiency	Regions	Distribution Channel	Benchmarks
Shell-Finish	One-Family Houses	<150.000 €	Timber Frame	Passive Houses	Vienna / Tirol	Show Home Parks**	Avg. m²/House
Floor Covering	Two-Family Houses	150.000 – 250.000 €	Solid Construction	Rest	Carinthia	Direct	Avg. Price/m²
„Turn-Key"	Row Houses	>250.000 €			Styria	Indirect	
	Residential Buildings				Burgenland		
					Salzburg		
					Voralberg		
					Upper Austria		
					Lower Austria		

Segment analyzed in terms of value and quantity

Segment analyzed only in terms of quantity

For all represented segments we show the total market and a forecast up to 2023, as well as market shares of the top players for the last two years.

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Definition and Demarcation

Building Type	
One-Family Houses	Buildings which are residences for only one family and contain one dwelling.
Two-Family Houses	Buildings which are residences for two families containing two separate dwellings.
Row Houses	Identical houses built on an connected area of land under one project.
Residential Buildings	Residential buildings with several dwellings on more than one floor.

Building Stage	
Shell-Finish	Completed building shell with plaster, windows and external doors, roofing, fireplace or exhaust pipe.
Floor Covering	Additionally to shell finish: heating, cabling, without floor covering, wall covering, sockets, sanitary installations.
„Turn-Key“	Additionally to ready for floor covering: floor covering, wall covering, sockets, sanitary installations.

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Definition and Demarcation

Construction Method

Timber Frame	Construction type by usage of wood and thermal insulation materials.
Solid Construction	Construction method applying of prefabricated elements of bricks, cement, massive wood elements.

Energy Efficiency

Passive Houses	The heating demand in the passive house is less than 15 kWh / (m^2a).

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Definition and Demarcation

*Show Home Parks in Germany			
Show Home Park Poing at München	Show Home Park Frankfurt	Show Home Park Mannheim	Direct (other Parks, Show Homes at Headquarters, etc.)
Show Home Park Stuttgart	Show Home Park Wuppertal	Ungerpark at Dresden	Indirect (Cooperations with the Building Societies, other Dealers, etc.)

**Show Home Park in Austria			
Blaue Lagune	Show Home Park Linz-Haid	Prefabricated House Center Dornbirn	Direct (other Parks, Show Homes at Headquarters, etc.)
Show Home Park Eugendorf	Show Home Park Graz	Kärntner Prefabricated House Center	Indirect (Cooperations with the Building Societies, other Dealers, etc.)

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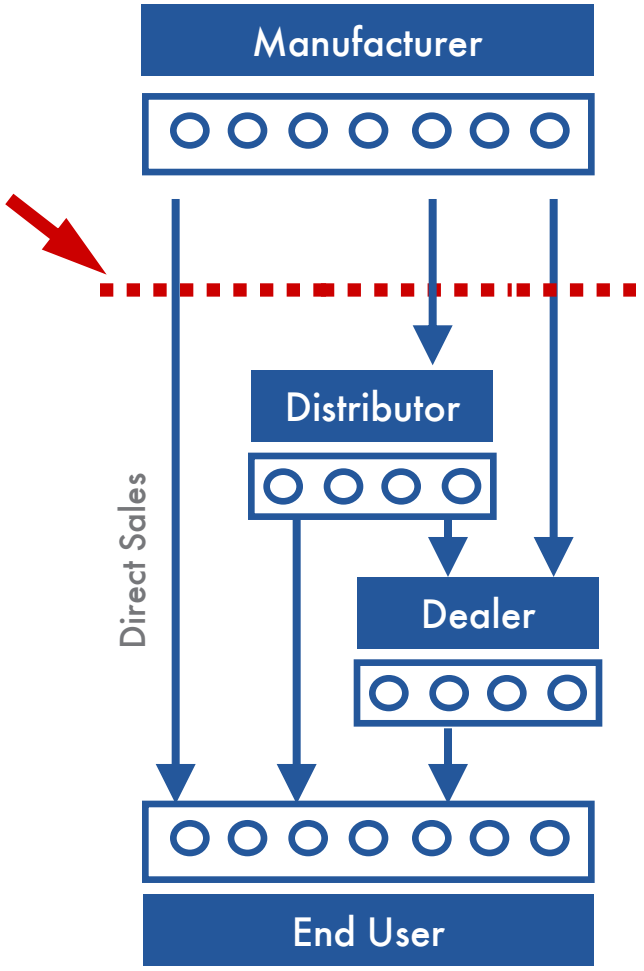
Our Method of Measuring Sales

Interconnection measures the total sales at street prices without VAT per branch to the first buyer.

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

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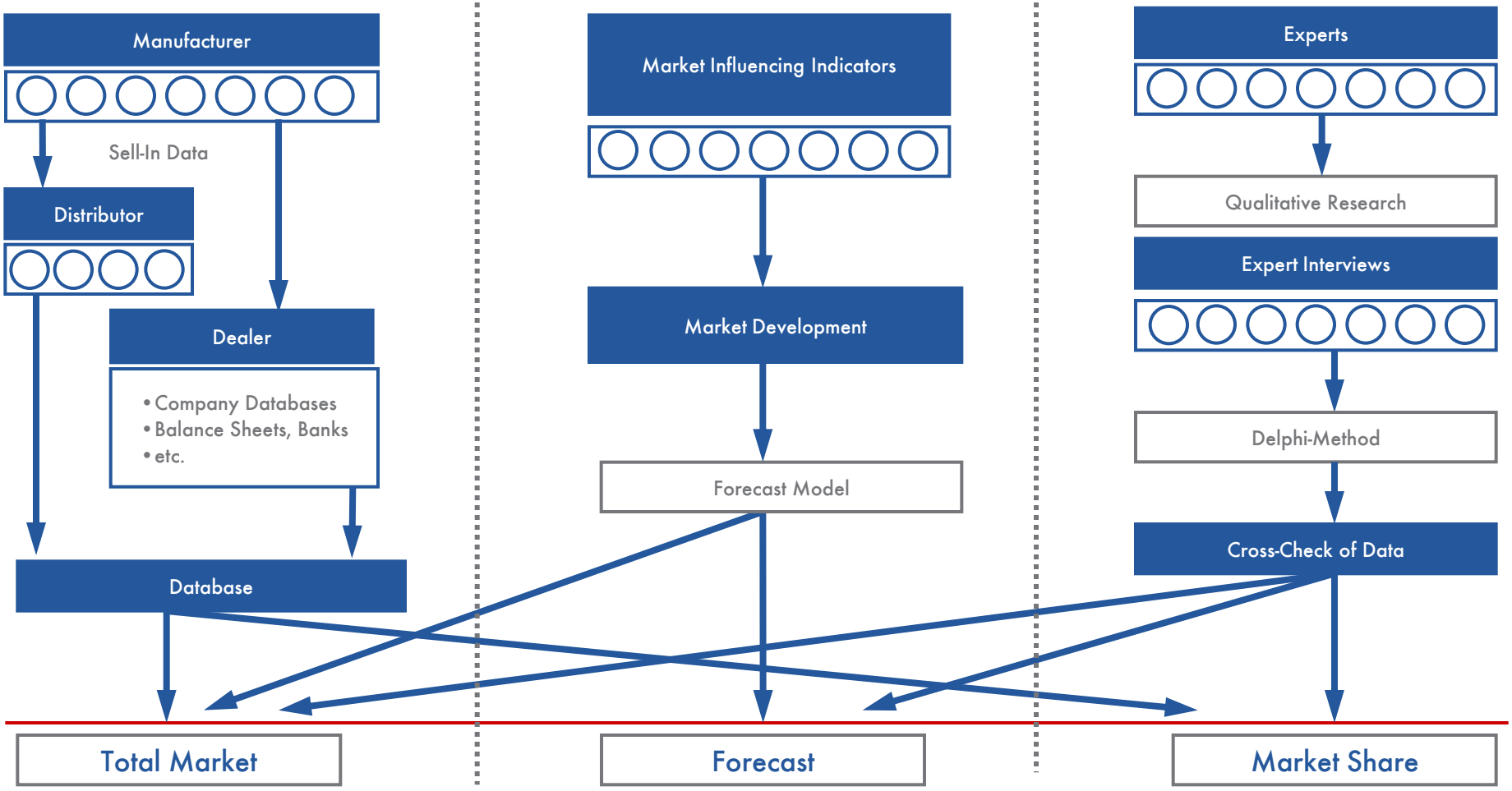
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology



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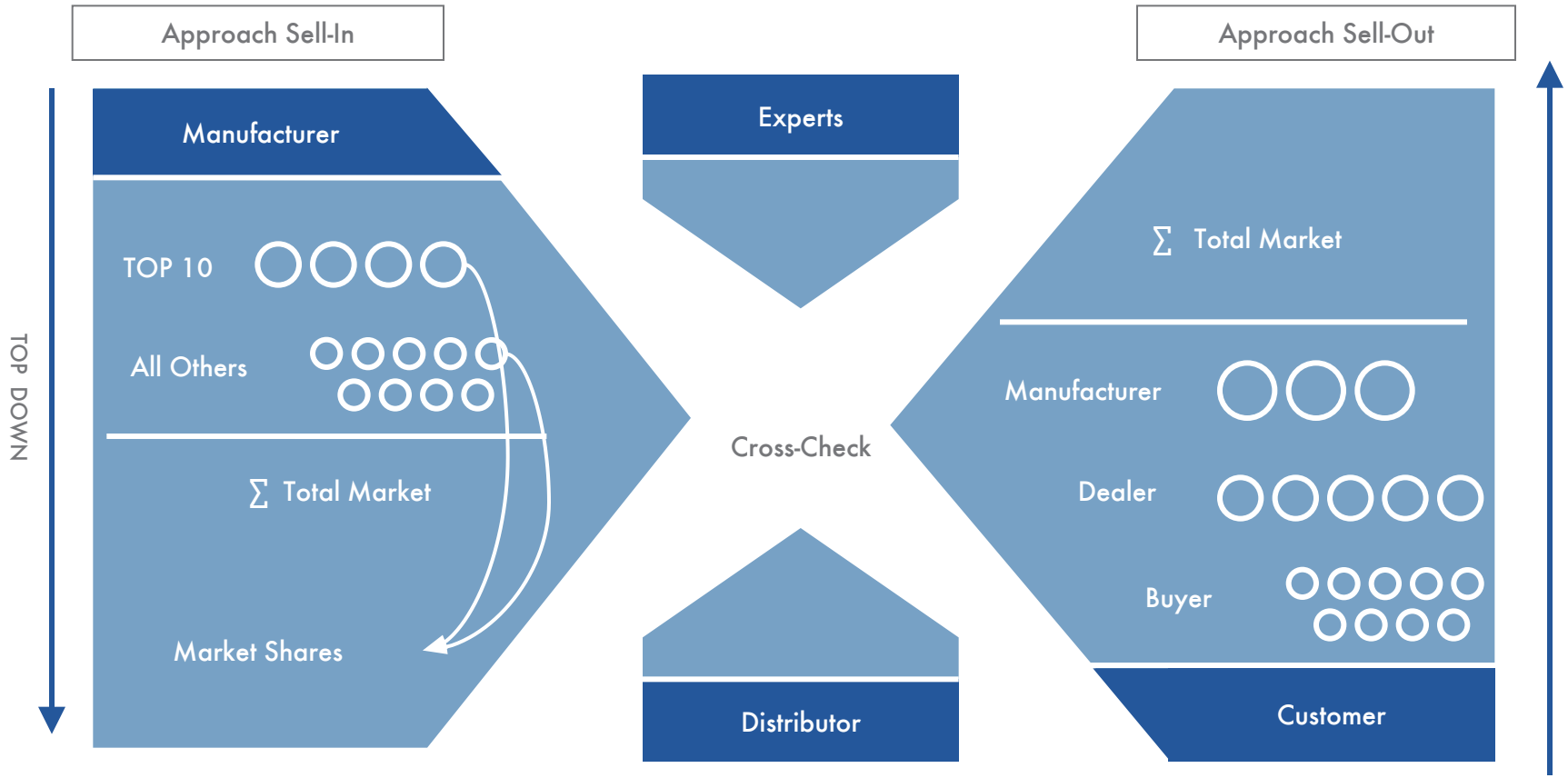
Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology



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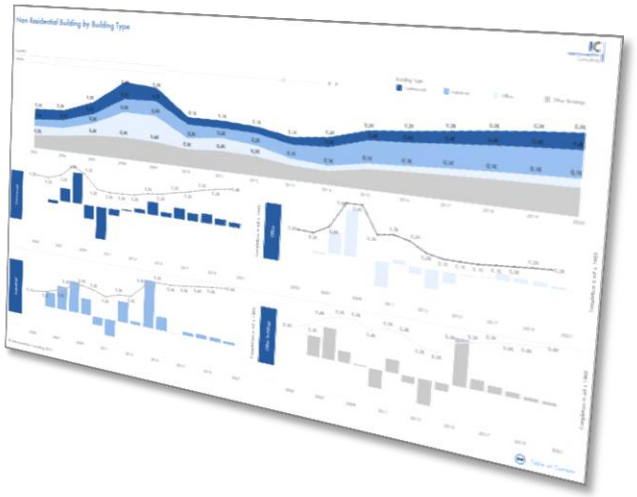
IC Cockpit-Solution
Online Tool with Interactive Dashboards Presenting the Data

A picture says more than 1000 words

- Complex correlations are visualized in the form of geo-, tree maps, bars etc.



Interactive Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online accesability

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file

In case of purchase exceeding € 5.000,- (netto), the price of Tableau cockpit is waived as well as for any subscription order exceeding 2 countries or regions. For all other options, price for Tableau cockpit costs € 500,-.

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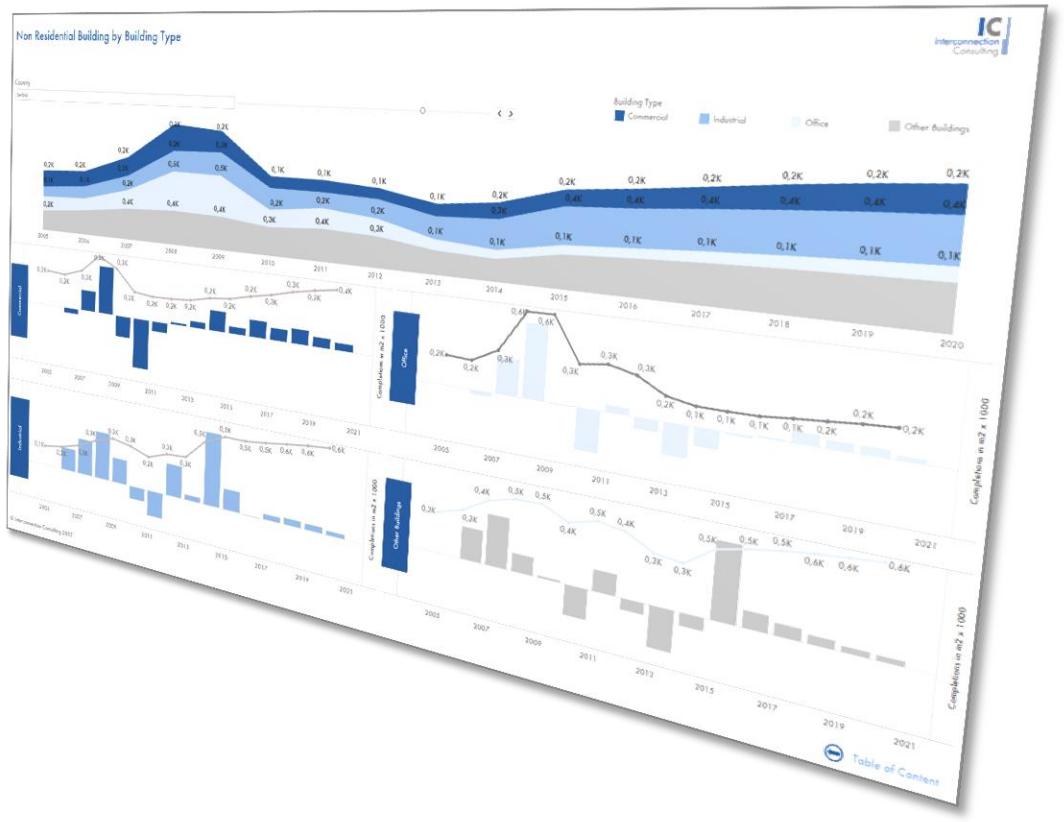
The Most Efficient Way to Present and Edit Data

- We offer you the possibility to implement **all data in a Tableau cockpit**.
- Together with you, we **define** how the final **cockpit** should look like in order to present the data to you in the most efficient way for your work.
- In case of subscription, the Dashboard Creation Fee will be waived from the second year. The market data is then automatically uploaded to the software.



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Investment Plan for Your Market Analysis

	Subscription*	Single Order
Single Country	€ 3.950,-	+25% for Single Issues
Total Report	€ 7.110,-	

*Subscription: 25% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

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Interconnection Provides Data for Corporate Decisions

Problem Solving Competence

We know the efficient tools to solve your problems/questions

International Focus

Offices in Vienna, Bratislava, Lviv and Buenos Aires

Industry Competence

Industry competence due to longtime experience and regularly conducted studies

Methodology Know-How

Variety of tools for different questions and market characteristics

Consulting – Strategy-Workshops

We support you deriving strategies and actions from the research results

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Our Market-Intelligence Tools

Market Analysis

Market Volume and Trends
Competition Analysis

Customer Insights

Focus Groups
Buying Motives
Customer Benefits

Price Simulation

Price Sales Function
Pricing Simulation Tool
Optimum Pricing

Management Information System

Business Intelligence Tools
Dashboards

Market Entry

New Markets/Segments
Scoring-Model

Distribution Analysis

Channel Maps
Distribution-Matrix
Margins

Brand Insight

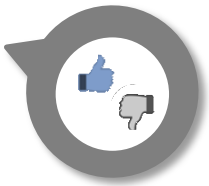
Brand Awareness
Brand Scorecards
Brand Affinity

Price Types

Customer Segmentation
Price Awareness
Buying Behavior

Mystery Shopping Price Tracking

Price Databases
Sales Evaluation



Customer Experience

Relevance / Satisfaction
Customer Loyalty
Net Promoter Score

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Chosen References

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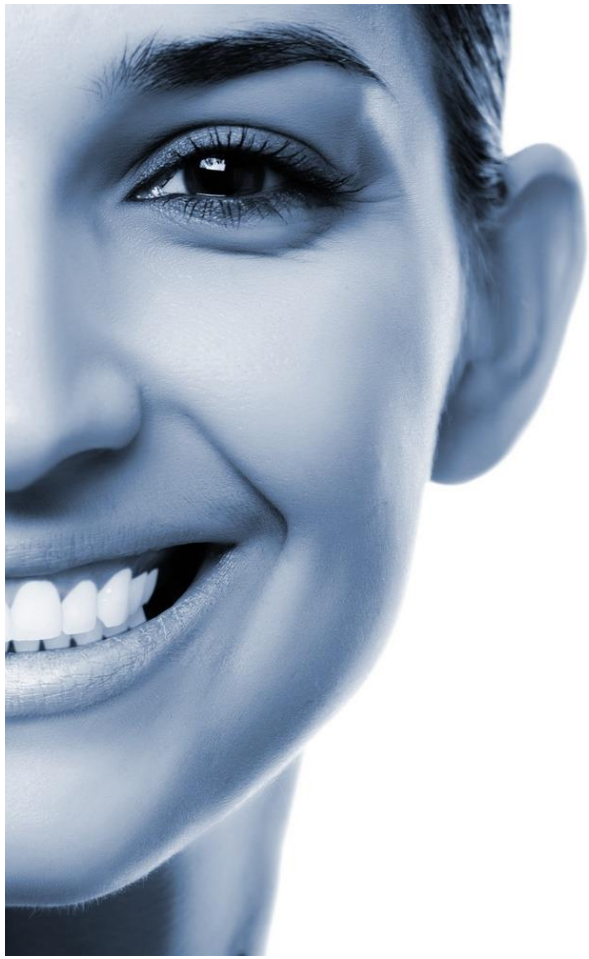
If there are any questions please
do not hesitate to contact us!

Interconnection Consulting
Getreidemarkt 1, A-1060 Wien

Daniel Kollar – Market Analyst
Tel: +43 1 5854623 -77
Fax: +43 1 5854623 -30
kollar@interconnectionconsulting.com



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FAX: +43 1 585 46 23 30
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Yes, we would like to order the IC Market-Tracking® Prefabricated Houses

(Please, print out the order form and mark your desired products)

Please choose from the available countries:

☐ Austria ☐ Germany

☐ Subscription* - Single Country Report ..... EUR 3,950.- / country
☐ Subscription* - Total Report DA ..... EUR 7,110.-

	Single Issue	Subscription*
25% price advantage		✓
IC Cockpits – Online Dashboard Solution	✓	✓
Interactive PDF	✓	✓
Full Flexibility – Within the sum of the subscription available country reports can be changed without any additional costs		✓
Web-Conference with the analyst free of charge		✓

In case of interest for a single issue of the report, please contact the responsible analyst.
Daniel Kollar – kollar@interconnectionconsulting.com – Tel.: +43 1 585 46 23 - 88

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