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

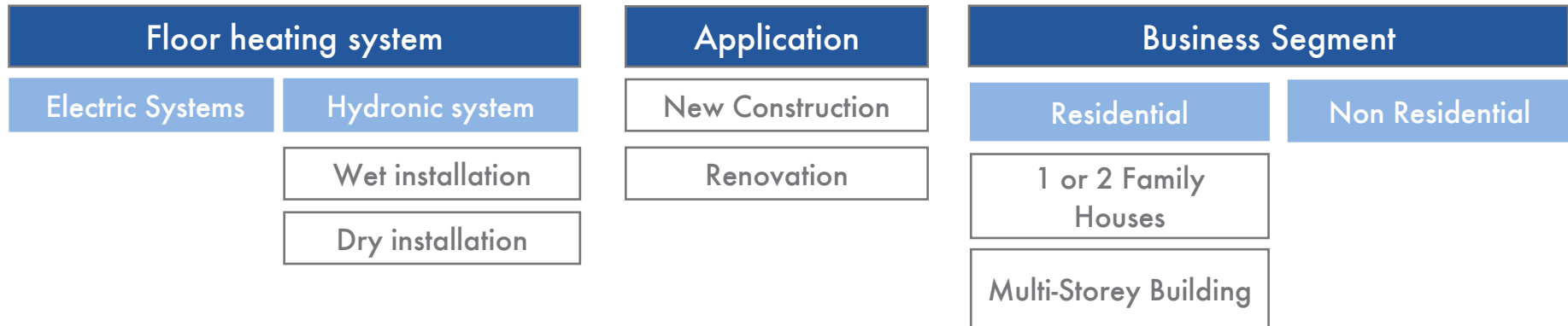
## IC Market Tracking Floor Heating in Europe 2017

Offer September 2017

# 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.
- ✓ Awareness of **Market Position** and development during the last two years, in comparison with major competitors and with respect to:
  - Total Market
  - Regional Markets
  - Product Groups
  - Applications
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.





The study includes total market and development from 2016 -2020f for each segment and market shares of Top Players for 2016 and 2017e

## Heating System

Hydronic Heating

Heating with hot water in pipes

Electric Heating

Heating with flexible heating elements including cables, preformed cable mats, bronze mesh, carbon films, etc.

Wet Installation

Systems are installed in the screed

Dry installation

Systems are installed under the floor cover, but not in the screed

## Application

New Construction

Application in new buildings

Renovation

Application in existing building

## Business segment

### Residential

1 or 2 family house

Multi storey building

### Non-Residential

Constructions used as a living space

Buildings that serve as a residence for only one or two families and contain a maximum of two dwellings

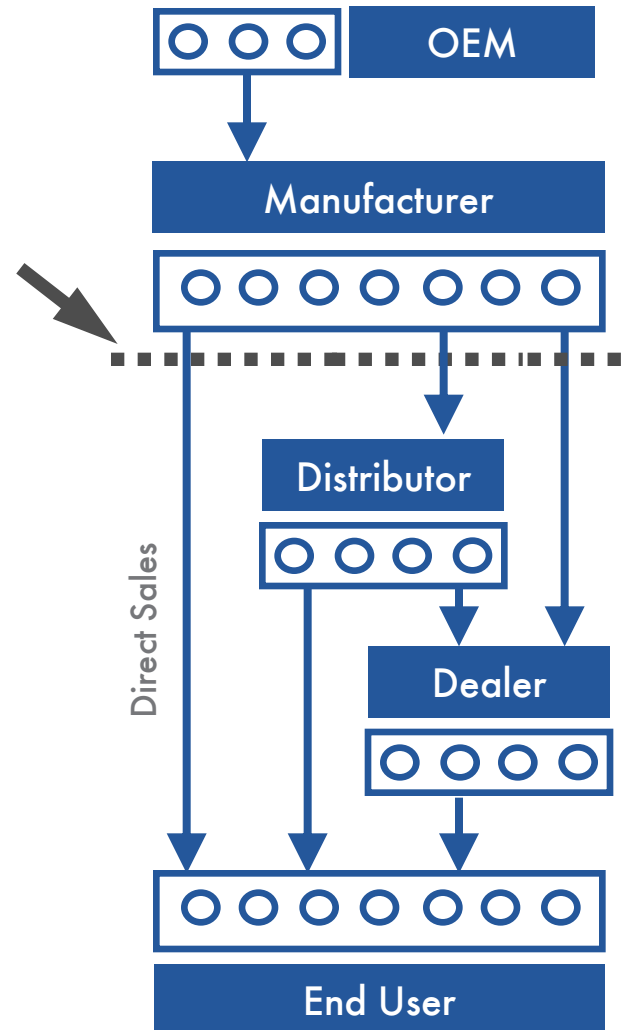
Residential buildings with several dwellings on more than one floor.

Constructions creating buildings for education, health, industry, storage, office, commercial, agricultural or other purposes.

# 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.



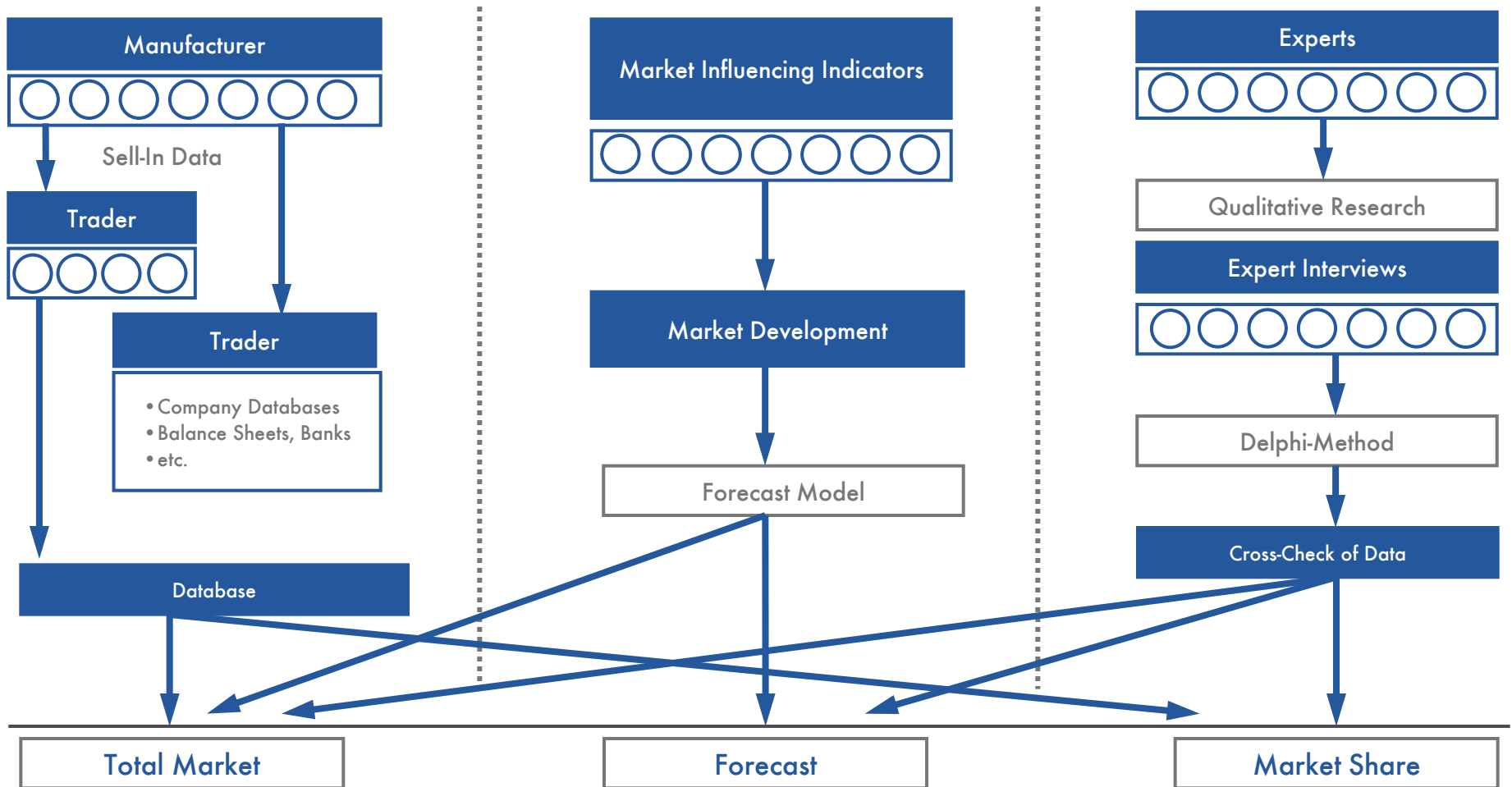
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

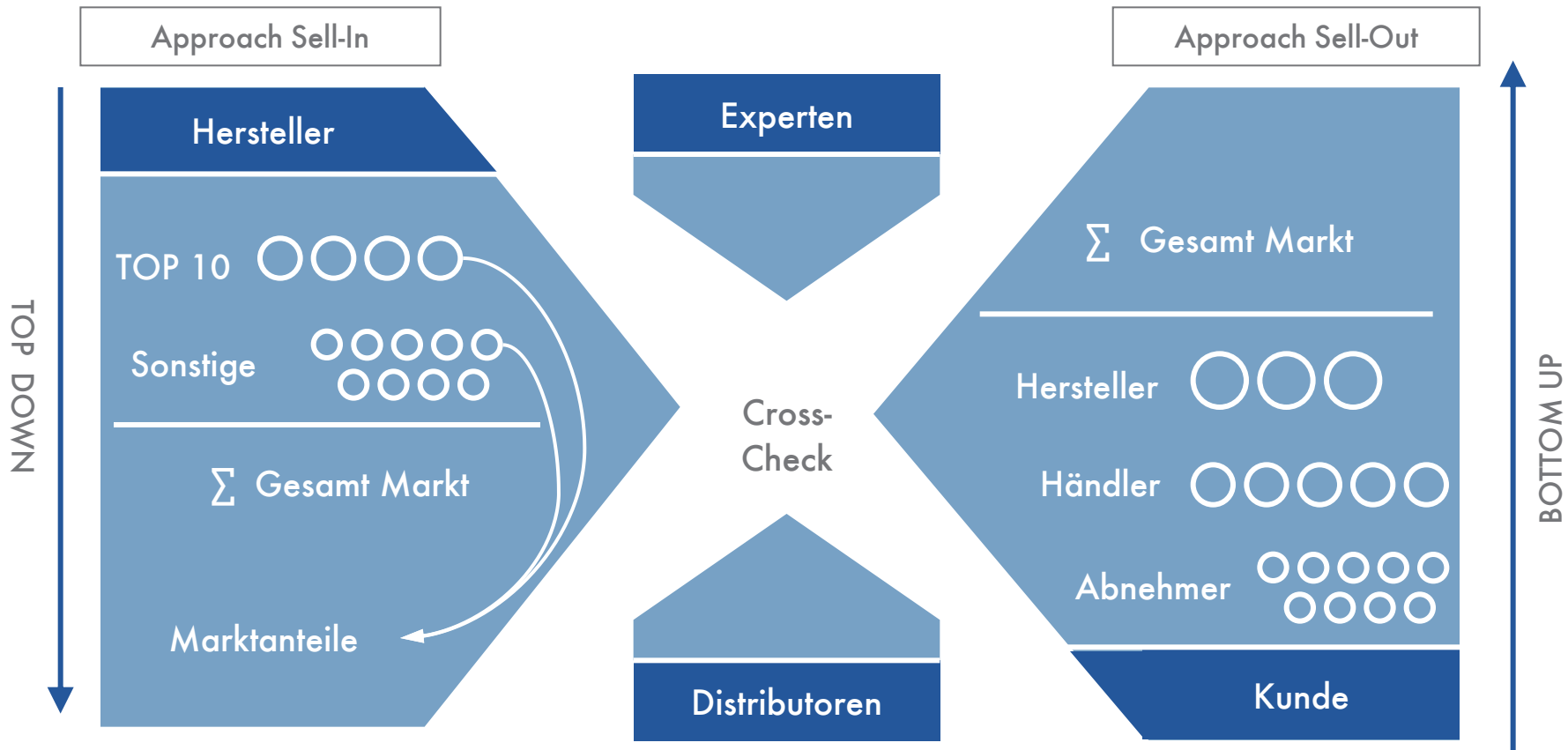
Methodology



# Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology

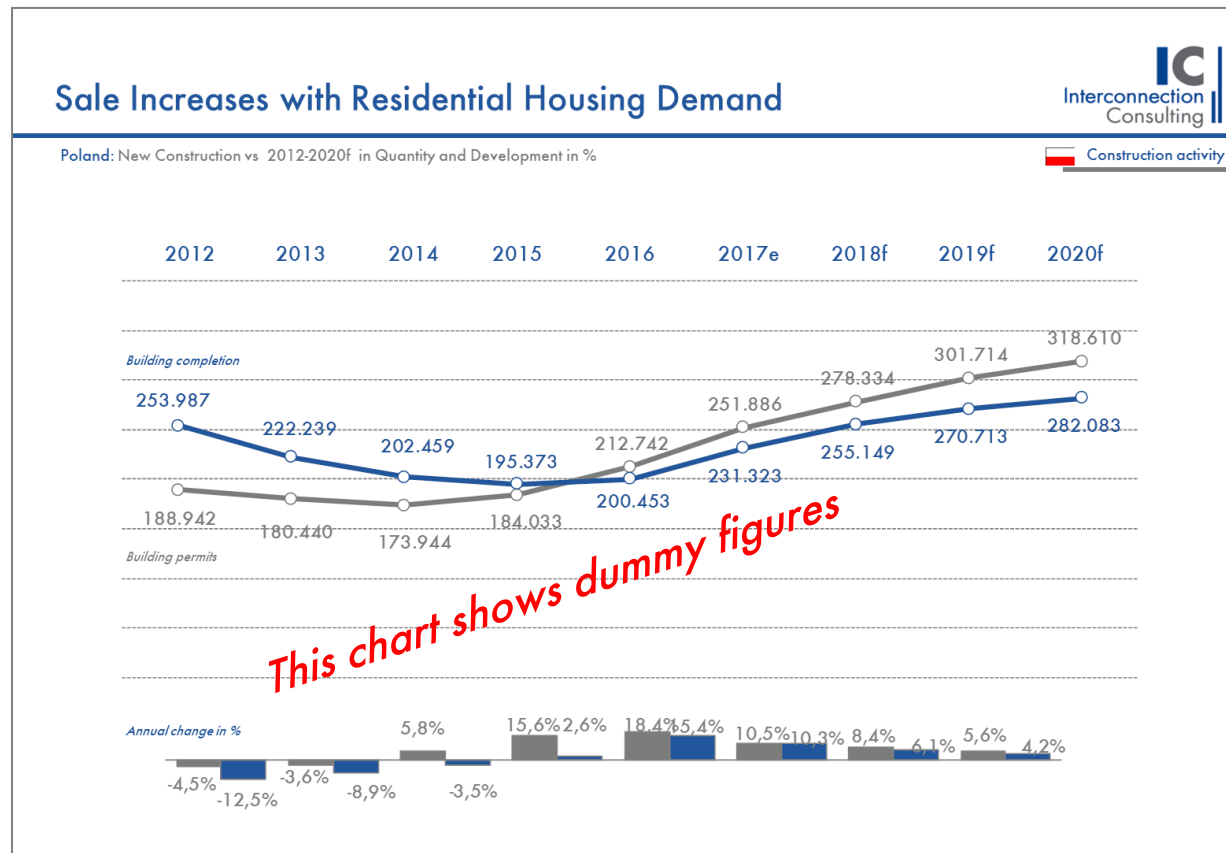




*The IC Market Tracking® is modularly built and consists of the following sections:*

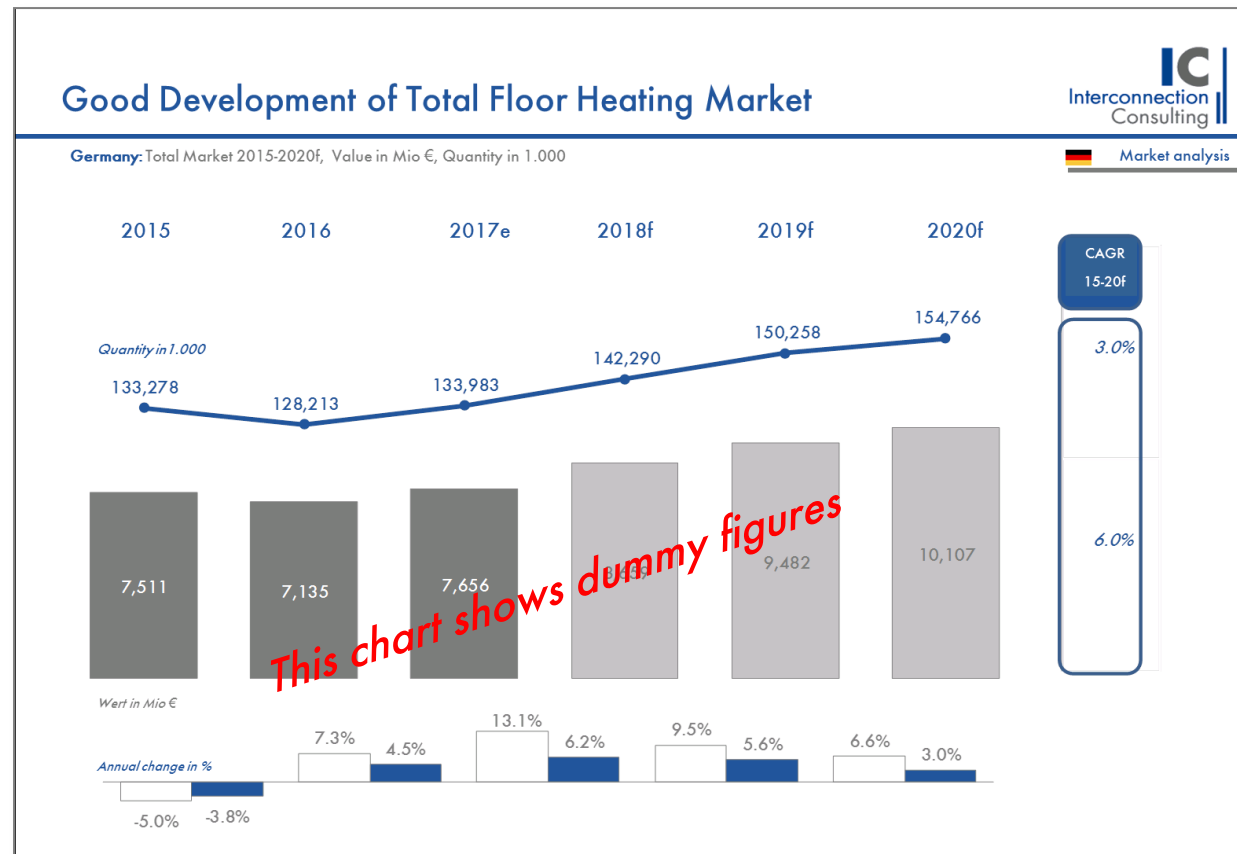
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analysed in the **Economic Environment**: You will find the most important data on main economic indicators, etc.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. 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 in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- 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. Company profiles provide you with further practical information on the main companies in the market.

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



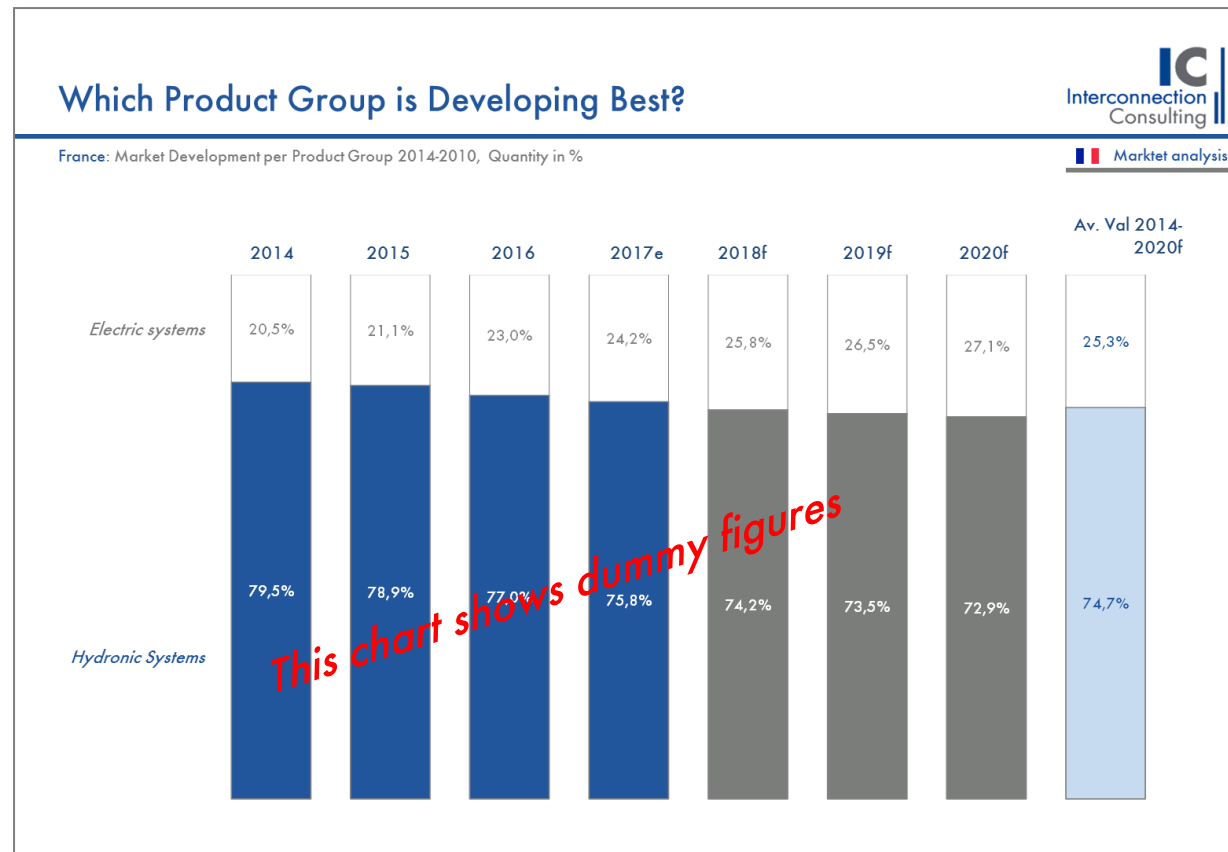
# What about the Total Market Development?

- Overview of the total market until the current year and forecast for the upcoming three years

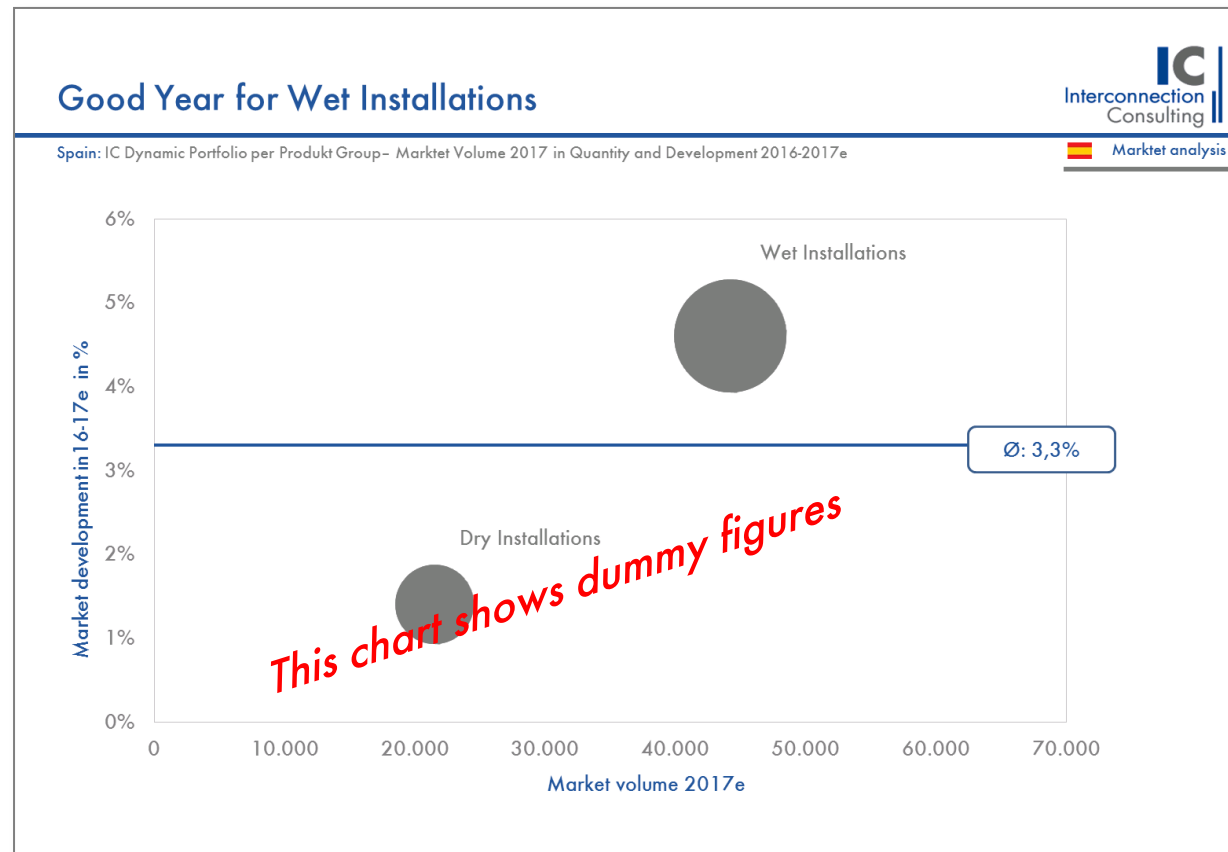


# Which Product Group is Developing Better?

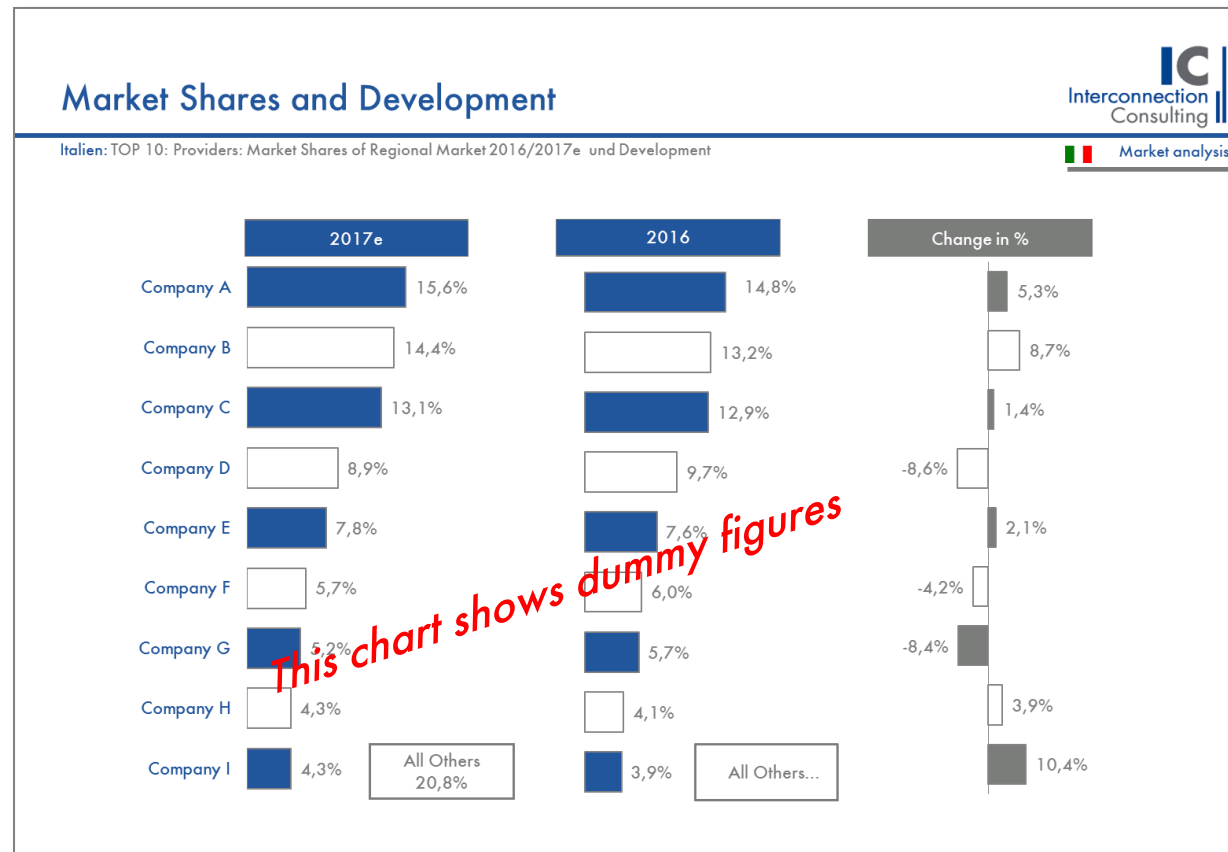
- Overview of the total market until the current year and forecast for the upcoming three years by product groups.



- Detailed analysis of important market segments in analysed regions with market shares and development



- Market Shares of the Top 10 market leaders in the Floor Heating Market



- In addition to the visualized report a Pivot Table will be included.
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modelling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

## 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	<b>A</b>	<b>B</b>	<b>C</b>
<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>

# Investment Plan for Your Market Research

	Single Issue	IC Subscription *	Scale of Discounts	
Single Region	€ 2.950,-		€ 5.000,-	10%
Total	€ 9.999,-		€ 10.000,-	25%
			€ 15.000,-	30%
			€ 20.000,-	35%

- Germany
- UK
- France
- Spain
- Italy
- Poland

**\*IC Subscription:** 20% price advantage compared to single issue: Total - € 9,936. 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.

Price taking into account the scale of discount.

Price includes an interactive PDF Document. All prices shown exclude 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 Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the heating 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 Industry 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

### Webmultiplier



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

*„IC is a constant tutor in the evaluation of markets and offers a helpful decision basis.“*

Mr. Bernd Blümmers

Directeur General, Saint-Gobain Solar Systems, Central Europe, Aachen



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

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

**Mag. Doris Bankosegger – Market Analyst**  
Tel: +43 1 5854623 - 28  
Fax: +43 1 5854623 - 30  
bankosegger@interconnectionconsulting.com

**Dr. Frederik Lehner – Managing Director**  
Tel: +43 1 5854623 - 11  
Fax: +43 1 5854623 - 30  
lehner@interconnectionconsulting.com

Interconnection Consulting | Vienna • Oberstdorf • Lviv • Bratislava

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we show you the way

## Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 500
- Optional: Hard Cover

## Price

- per region: 2.950 €
- Total: 9.999 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.



## Options of ordering – Fax:+43 1 5854623 30

- Click „Buy Now“ on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

## Content of the Market Report

### Structure of the Study

#### Language of the report

English, German on Request

Introduction, Market Structure & Executive Summary Definition and demarcation of product groups, regions and methodology; summary of study results.

#### Market Drivers

Key economic factors influencing the market: consumer behaviour, main economic indicators etc.  
Import & export statistics

#### Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups and application fields.

#### Competition Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

### Market Structure

#### Regions:

Germany, UK, France, Spain, Italy, Poland

#### Systems

Hydronic systems

- Wet installation
- Dry installation

Electric systems

#### Application

New Construction, Renovation

#### Business Segment

Residential

- 1 or 2 Family houses
- Multi-storey buildings

Non residential

### Methodology

#### Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analysed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.