



IC Market Tracking®

Air Conditioners in Central & Eastern Europe 2021

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2017 – 2020 for the total market development as well as
 - Product Groups
 - Application Areas
 - Distribution Channels
- Forecasts from 2021 – 2024 for the total market as well as each analysed segment and sub-segment

COMPETITION ANALYSIS

- Market shares of the top players for 2019/20
 - Market Shares on the total market in terms of value and quantity
 - Market Shares per product groups in terms of value and quantity

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labour market, demographics, retail market.
- Continuous updates of the data



Market & Competition Analysis

Market Volume

Market Growth

Trends

Market Shares

What Do You Get - Your Benefits at a Glance

Presentation of the Data and Deliverables

Market Intelligence Tool Access and Deliverables



ONLINE-COCKPITS

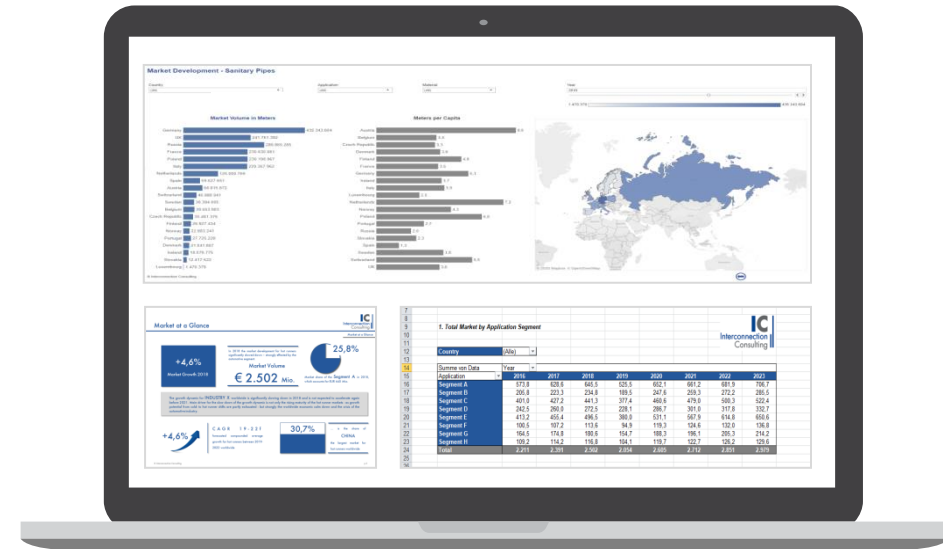
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

EXECUTIVE REPORTS

- Executive report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts already integrated within Tableau

RAW DATA -TABLES

- Downloadable tables from MIS as xls. cvs. jpg. or other formats for your own integration
 - Graphs
 - Raw Data



Market Intelligence Tool and Reports



Online Dashboards

Executive Reports

Air Conditioners in



Product Groups

- Chillers
- Single Split & Multi Split
 - < 7 kW
 - > 7 kW
- VRF
- Rooftops

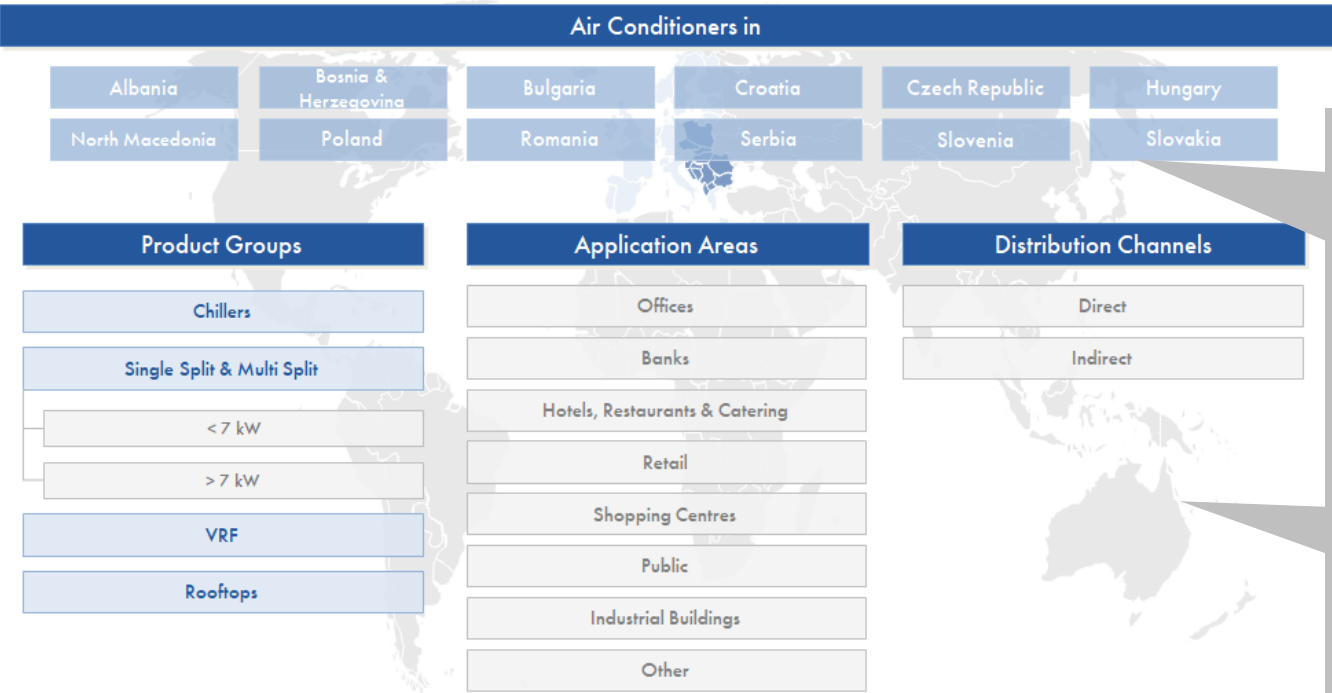
Application Areas

- Offices
- Banks
- Hotels, Restaurants & Catering
- Retail
- Shopping Centres
- Public
- Industrial Buildings
- Other

Distribution Channels

- Direct
- Indirect

Market Structure - Interpretation



- Market data are available for each country separately as well as aggregated for the package purchased.
- Each country report includes data for air conditioners by product groups, application areas and distribution channels separately, as well as aggregated for the total market of air conditioners in terms of quantity and value.
 - Single & multi split air conditioners are further broken down into subcategories.
 - Application types and distribution channels are shown only in terms of value.

Definitions and Demarcation

Product Groups

Chillers

Devices that extract heat from water-based central cooling systems in order to reach and maintain the indoor temperature at a desired level.

Single Splits

Air conditioning system in which one condensing unit placed outside the building is connected with a refrigeration pipe to one fan coil placed inside.

Multi Splits

Air conditioning system in which one condensing unit placed outside the building is connected with a refrigeration pipe to several fan coils placed inside (Including ducted split).

VRF

(Variable refrigerant flow) a split system where the expansion of the refrigeration occurs in the indoor units but not in the outdoor unit.

Rooftops

Package air conditioner which has the evaporator coil, condenser and compressor all located in one cabinet placed on a roof. May use outside air as a free source of cooling.

Turnover

Turnover is stated in 1.000 Euro. Values are always Net-Turnovers (No List-Prices), discounts included.

The Unique Mix of Methods and Approaches for Reliable Market Analysis



SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



Survey with Manufacturers & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturers as well as interviews with industry experts.



Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**
“Only who talks with the industry knows what’s going on!”

The Market Intelligence Tool

Dashboards - The Best Way to Work with Data

A picture says more than 1000 words

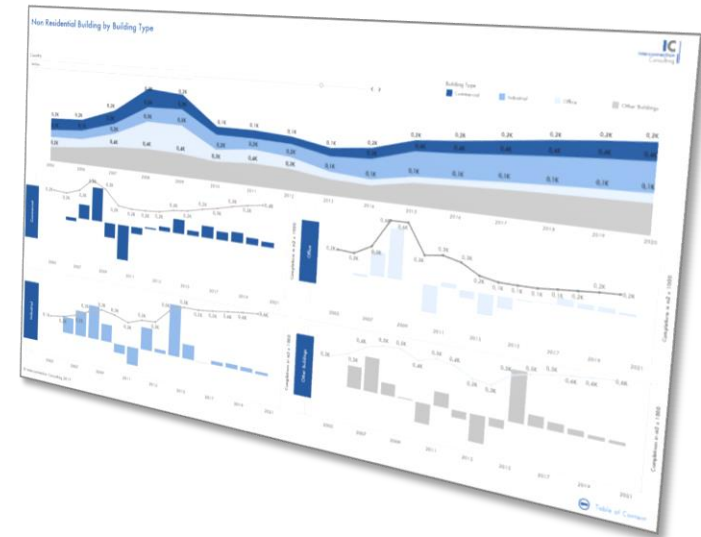
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

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

Easy online accessibility

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

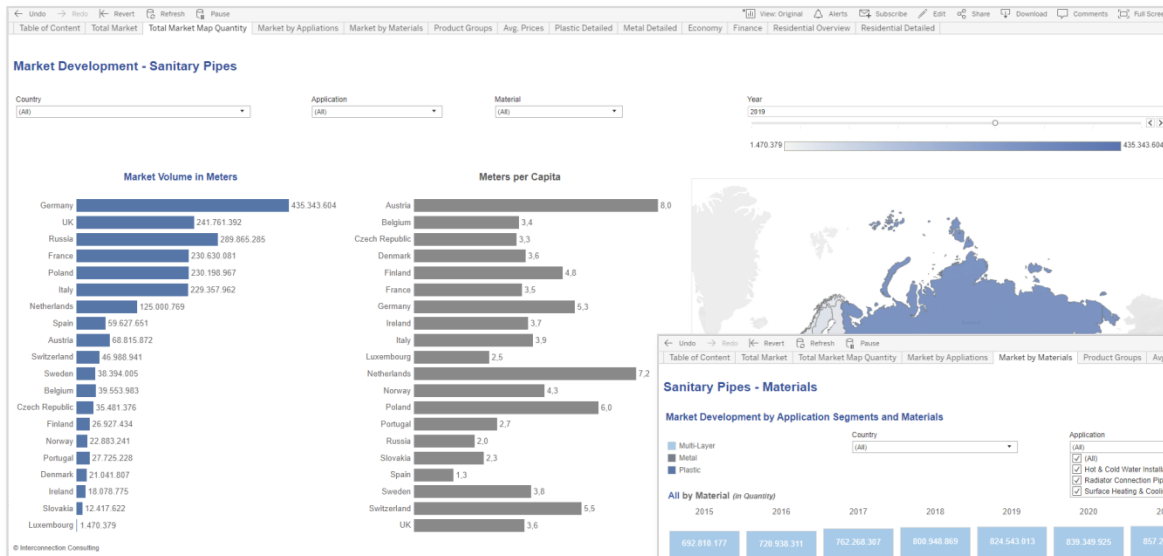


Usability of the Market Intelligence Tool

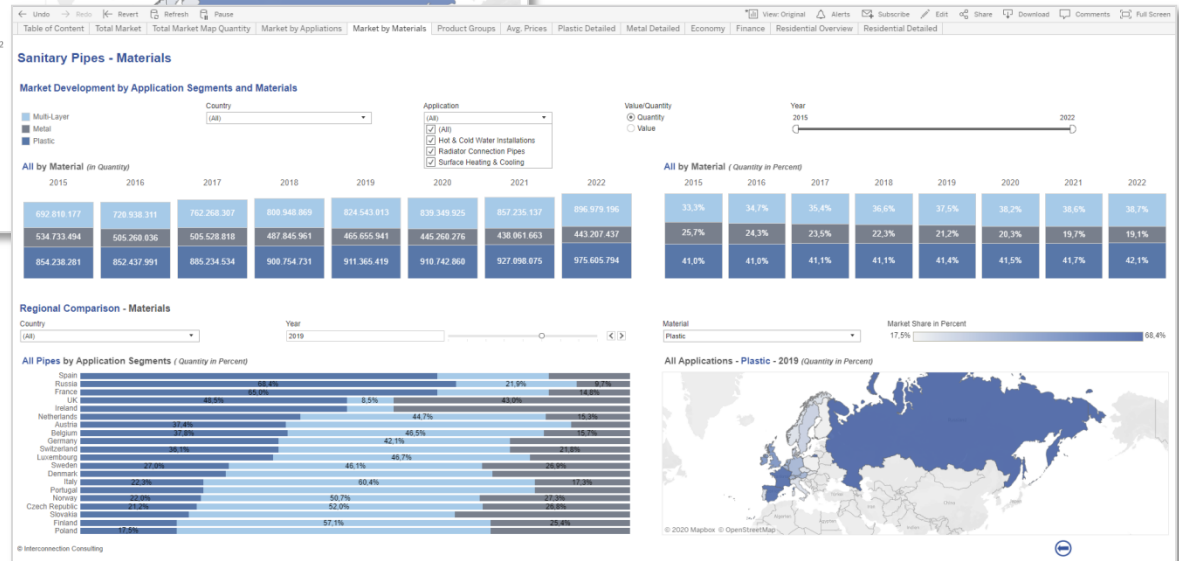
Let's Put it in a Video...



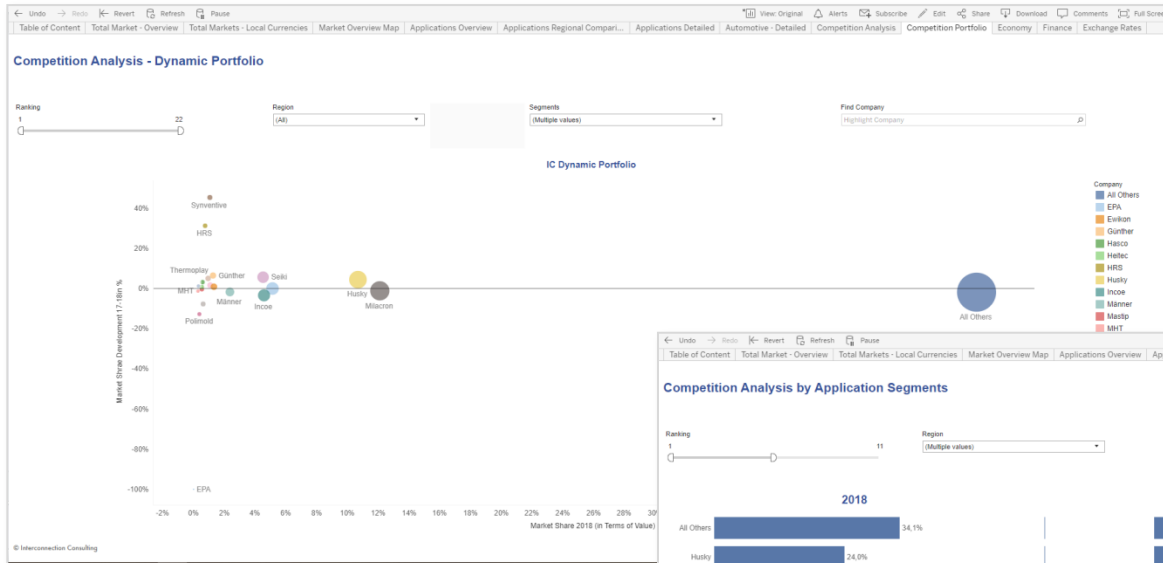
Sample Cockpits for Market Analysis Data



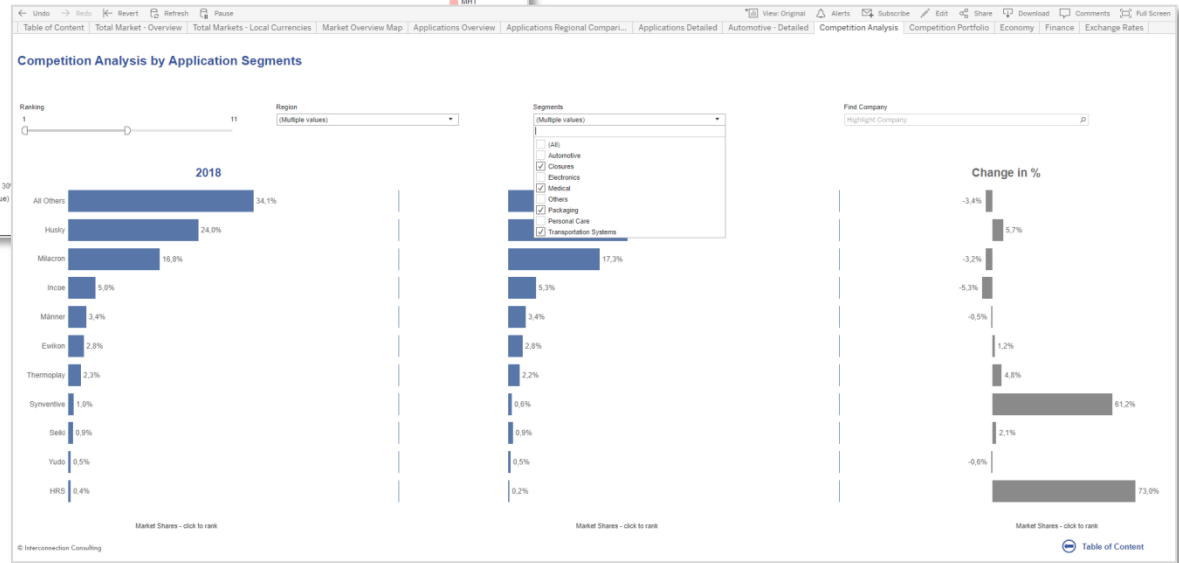
This chart contains fictive data



Sample Cockpits for Competition Data

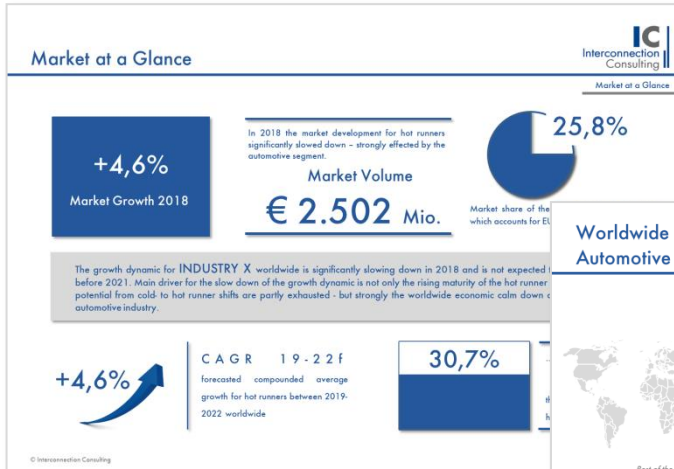


This chart contains fictive data

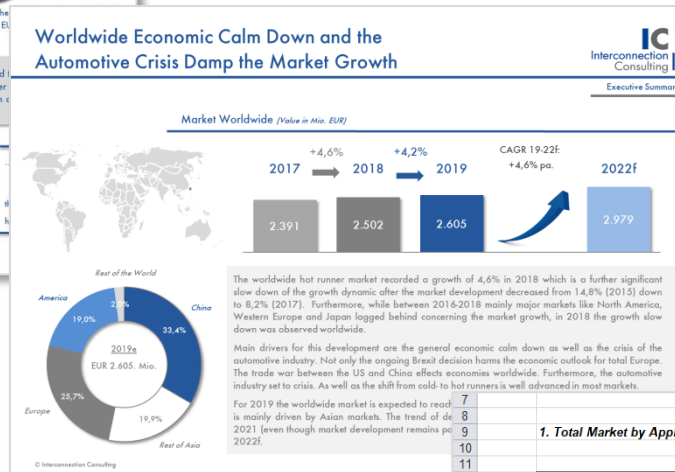


Additional Deliverables

Executive Summary and Pivot-Tables



Executive Summary as PDF (fictive data)



Executive Summary as PDF (fictive data)

1. Total Market by Application Segment

Country								
(Alle)								
Summe von Data	Year							
Application	2016	2017	2018	2019	2020	2021	2022	2023
Segment A	573.8	628.6	645.5	525.5	652.1	661.2	681.9	706.7
Segment B	205.8	223.3	234.8	189.5	247.6	259.3	272.2	285.5
Segment C	401.0	427.2	441.3	377.4	460.6	479.0	500.3	522.4
Segment D	242.5	260.0	272.5	228.1	286.7	301.0	317.8	332.7
Segment E	413.2	455.4	496.5	380.0	531.1	567.9	614.8	650.6
Segment F	100.5	107.2	113.6	94.9	119.3	124.6	132.0	136.8
Segment G	164.5	174.8	180.6	154.7	188.3	196.1	205.3	214.2
Segment H	109.2	114.2	116.8	104.1	119.7	122.7	126.2	129.6
Total	2.211	2.391	2.502	2.054	2.605	2.712	2.851	2.979

Pivot-Table including all raw data as MS-Excel file (fictive data)

Investment Plan for Your Market Research

IC Market Tracking® Air Conditioners in CEE 2021

Prices & Conditions

	Subscription *	Available Countries
3 Countries of Your Choice	€ 5.950,-	<ul style="list-style-type: none"> Albania Bosnia & Herzegovina Bulgaria Croatia Czech Republic Hungary North Macedonia Poland Romania Serbia Slovenia Slovakia
6 Countries of Your Choice	€ 10.950,-	
All Countries	€ 17.950,-	



- **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 automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.
- The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of an subscription.
- In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit (Software for Online Dashboards) is included as well as for any subscription order exceeding 2 countries or regions. For all other options, license costs for Tableau cockpits are € 500,- per license per year.

Selected References for our Market Reports

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

Mr. Bernd Blümmers
General Manager,
Saint-Gobain Solar Systems
Central Europe





Our Market-Intelligence Tools



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

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we show you the way

Yes, we would like to order the IC Market Tracking® Air Conditioners in Central & Eastern Europe 2021

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

Please choose from the available countries

- | | | |
|---|--|-----------------------------------|
| <input type="checkbox"/> Albania | <input type="checkbox"/> Czech Republic | <input type="checkbox"/> Romania |
| <input type="checkbox"/> Bosnia & Herzegovina | <input type="checkbox"/> Hungary | <input type="checkbox"/> Serbia |
| <input type="checkbox"/> Bulgaria | <input type="checkbox"/> North Macedonia | <input type="checkbox"/> Slovenia |
| <input type="checkbox"/> Croatia | <input type="checkbox"/> Poland | <input type="checkbox"/> Slovakia |

- | | |
|---|--------------|
| <input type="checkbox"/> 3 Countries of your Choice | EUR 5.950.- |
| <input type="checkbox"/> 6 Countries of your Choice | EUR 10.950.- |
| <input type="checkbox"/> All Countries | EUR 17.950.- |

	Single Issue	Subscription*
25% price advantage		✓
IC Cockpit – Online Dashboard Solution	✓	✓
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		✓

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(please fill in the data completely)

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(necessary if different from the billing address)

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Country: _____

E-Mail: _____

Date	Name	Signature
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***Subscription:**

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. 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 includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of a subscription.

General Terms of Business

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