

IC Market Tracking®

Office Furniture Worldwide 2025

Company Profiles



Interactive Dashboards



Market Drivers



automatically updated

more than just a report – A TOOL FOR SUCCESS!

Detecting Market Potential



GEO-Maps



Benchmarks



Strategic Workshops



on request

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2021 – 2024 for the total market development as well as
 - Product Groups
 - Price Segments
 - Customer Segments
 - Distribution Channels
- Forecasts from 2025 – 2028 for the total market as well as each analysed segment and sub-segment

COMPETITION ANALYSIS

- Market shares of the top players for 2024/23
 - Market Shares on the total market in terms of value and quantity
 - Market Shares per product groups in terms of value, market shares per seating segment also in terms of 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

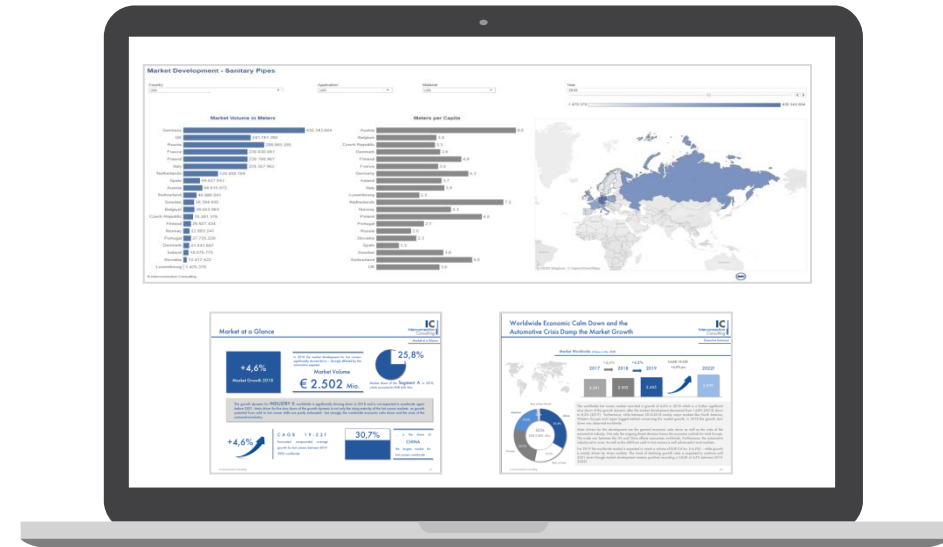


ONLINE-COCKPITS

- 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 summary dashboards 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

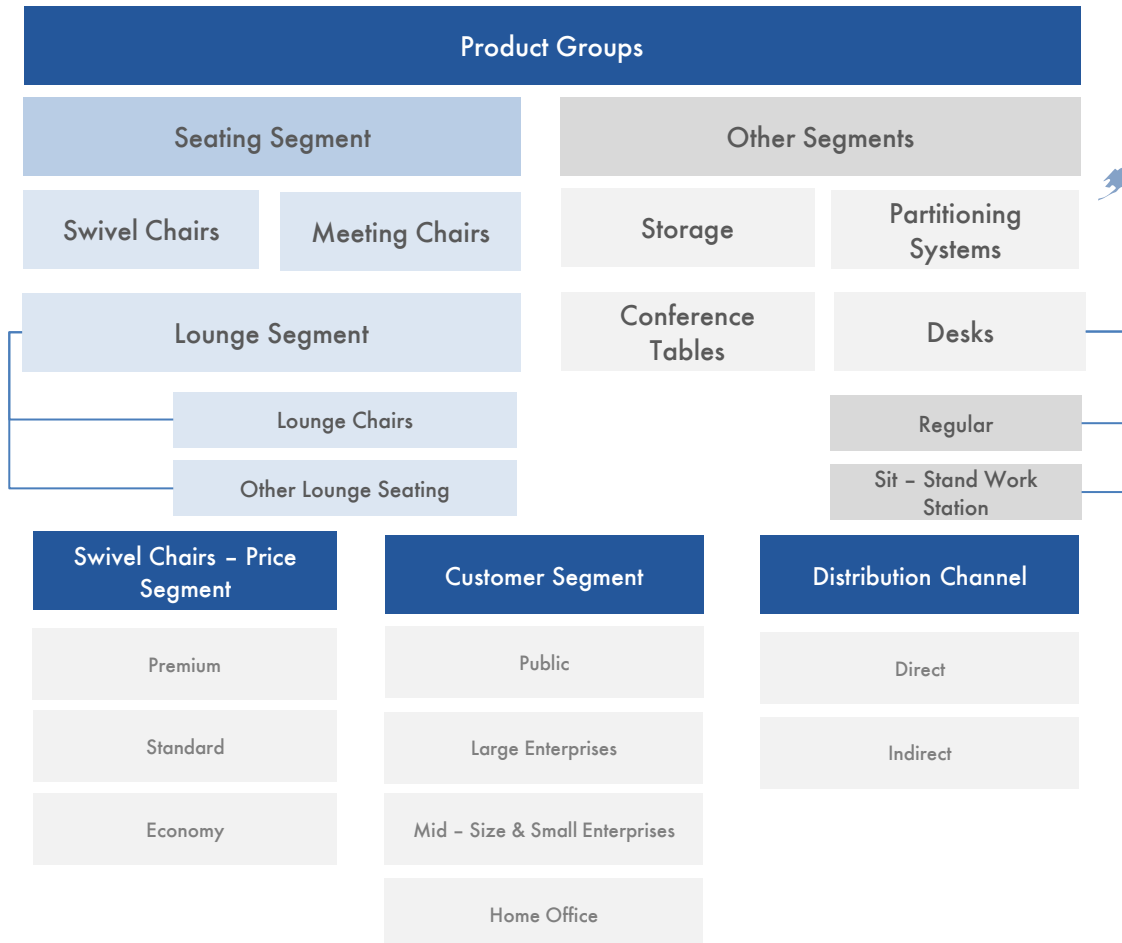


Market Intelligence Tool and Reports



Online Dashboards

Market Report Structure



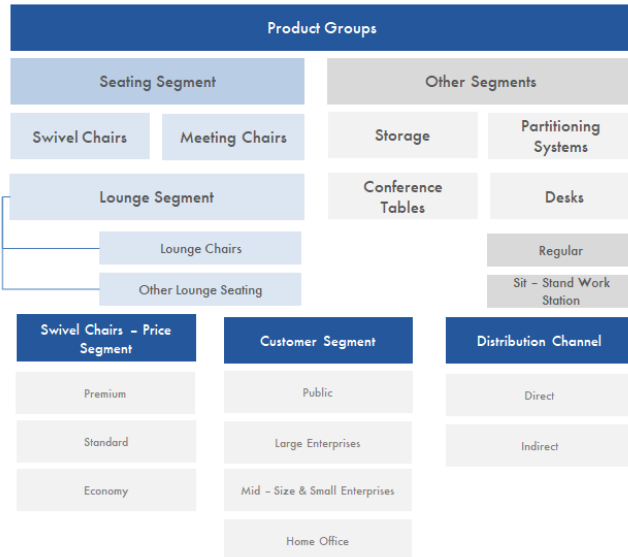
Available Countries



- For every market segment analysed the overall market during the previous two years and additionally make a forecast for the next 3 years.
- Turnover is stated in Mio. EURO. Turnover values are always net-turnover values (not list-prices), including rebates. Quantity in 1.000 Units means number of Furniture sold. Quantity data is stated for seating segment only.

Market Structure - Interpretation

Market Report Structure



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- Market data are available for each country/region separately as well as aggregated for the package purchased.
- Each country/region report includes data for office furniture by product groups, price segments, customer segments and distribution channels separately as well as aggregated for the total market of office furniture in terms of value.
 - Product groups are broken down into two main categories:
 - seating segment – swivel chairs, meeting chairs and lounge segment, which is divided into two more categories.
 - other segments – storage, partitioning, conference tables and desks, which is divided into two more categories.
- Price segments are shown only for segment of swivel chairs.
- Data for seating segment is shown in terms of value and quantity as well.

Product Groups

1

Seating Segment

The data is presented in terms of value and quantity

Swivel Chairs

A swivel chair is a type of chair that is mounted on a central mechanism allowing it to rotate horizontally in any direction.

Meeting Chairs

Conference chairs are usually designed with a low or mid backrest. Unlike other types of office chairs, many conference chairs promote a forward-leaning posture, by tilting the seat forward slightly. This category includes, for example, folding chairs for long meetings and arm or easy chairs for conference rooms

Lounge Segment

Lounge Chairs

Guest chair, waiting area chair, reception/ break room area chairs

Other Lounge Seating

Sofas (2-/3- /etc. seater sofa), armchairs, stools, 2-/3- /some seater bench

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

Quantity in 1.000 Units means number of Furniture sold.

For every market segment analysed the overall market during the previous two years and additionally make a forecast for the next 3 years.

- Furniture sold to private persons through B2C channel is NOT counted. (e.g. IKEA furniture) Kitchen Furniture, School Furniture, Lecture Hall Furniture are also excluded from the study-
- Please note, office furniture sold as B2B, even from large furniture stores is still considered. E.g. IKEA B2B in Nordics.
- Manufacturers of Partitioning Systems only are not included (they are covered by a separate survey).

Product Groups

2

Other

The data is presented in terms of value

Storage

Cupboards, filing cabinets, mobile and fixed pedestals, containers, partitions and bookcases - neither hanging files nor other office material.

Conference Tables

Tables not used as permanent work place and used by multiple people (also called meeting tables).

Partitioning Systems

Partitioning systems refer to modular or customizable structures used to divide interior spaces into separate areas or zones. These systems are typically composed of panels, screens, or walls that can be configured and arranged to create partitions within a room or open-plan space. Partitioning systems may offer features such as soundproofing. They provide a versatile and adaptable solution for optimizing the use of interior space while maintaining flexibility for future modifications or reconfigurations. This category includes, for example, mobile partitions, panels, space divisions, desk mounted screens produced by office furniture manufacturers.

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

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Desks
Regular
Sit – Stand Work Station

Excluding pedestals and all types of screens (e.g. desk-up and system).

A piece of furniture with a flat table-style work surface used in the office space.

A sit/stand desk allows the user to alternate between sitting and standing by being able to lower or raise the work (desk) platform.

Swivel Chairs – Price Segment

Premium
Standard
Economy

The data is stated in terms of value.

>550,- €

150- 550,- €

less than 150,- €

Distribution

Direct
Indirect

The data is stated in terms of value.

Selling refers to selling products directly to the consumer in a non-retail environment, also to selling through own branches / sales representatives (it concerns only sales through B2B). Online sales are also included.

Sales through all other intermediaries (specialized dealers, wholesalers, other retailers, internet – shops)

For every market segment analysed the overall market during the previous three years and additionally make a forecast for the next 3 years.

Customer Segment	
Private	Public
	Large Enterprises
	Mid - Size ,Small Enterprises
	Home Office

The data is stated in terms of value.

Organizations and institutions that are run by government, e.g. tax offices, treasury offices, labor offices local regulation and administration offices etc. Public sector also includes voluntary sector, e.g. charities and other nonprofit organizations. The segment excludes schools, universities, hospitals.

Privately-owned companies with 250 employees or more

Privately-owned companies with less than 249 employees.

Office Furniture purchase for home offices / remote work.

Private segment excludes hotels and restaurants.

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

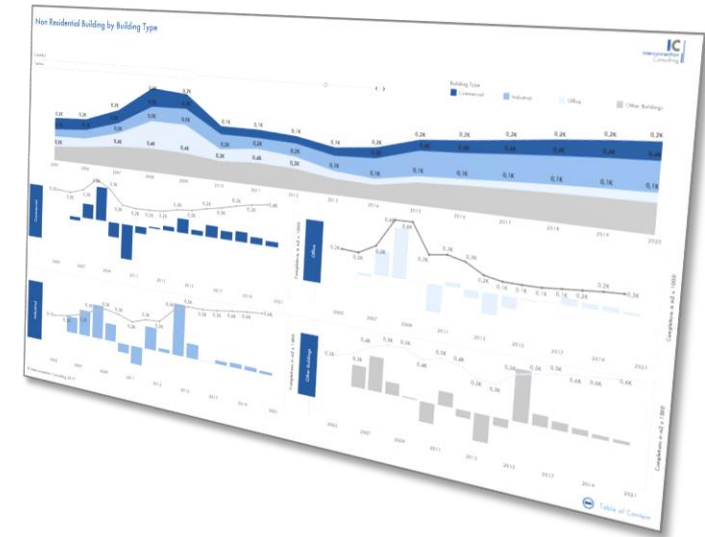
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

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

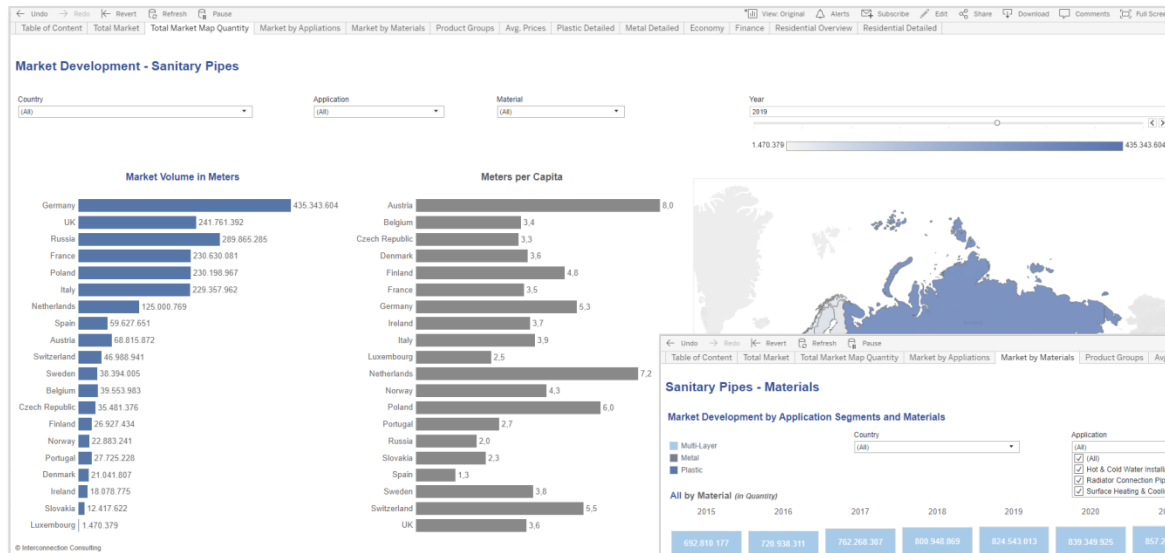


Usability of the Market Intelligence Tool

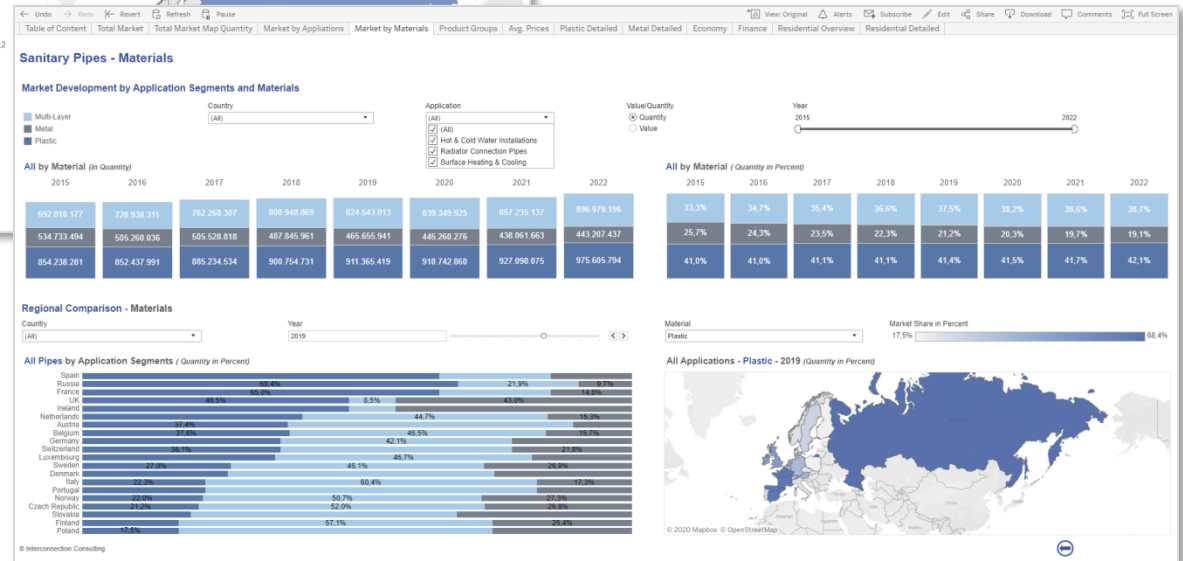
Let's Put it in a Video...



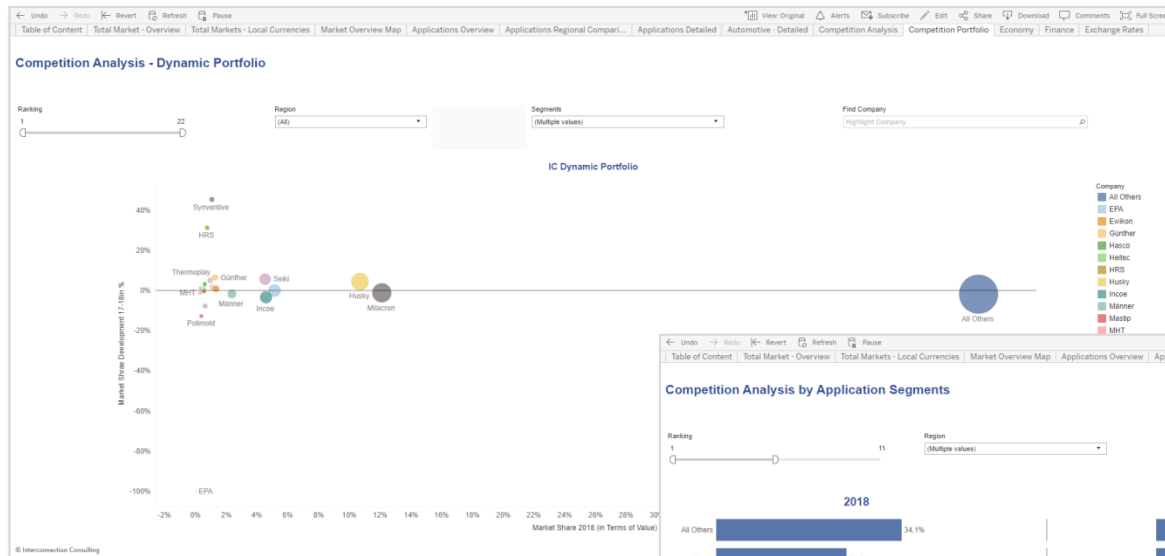
Sample Cockpits for Market Analysis Data



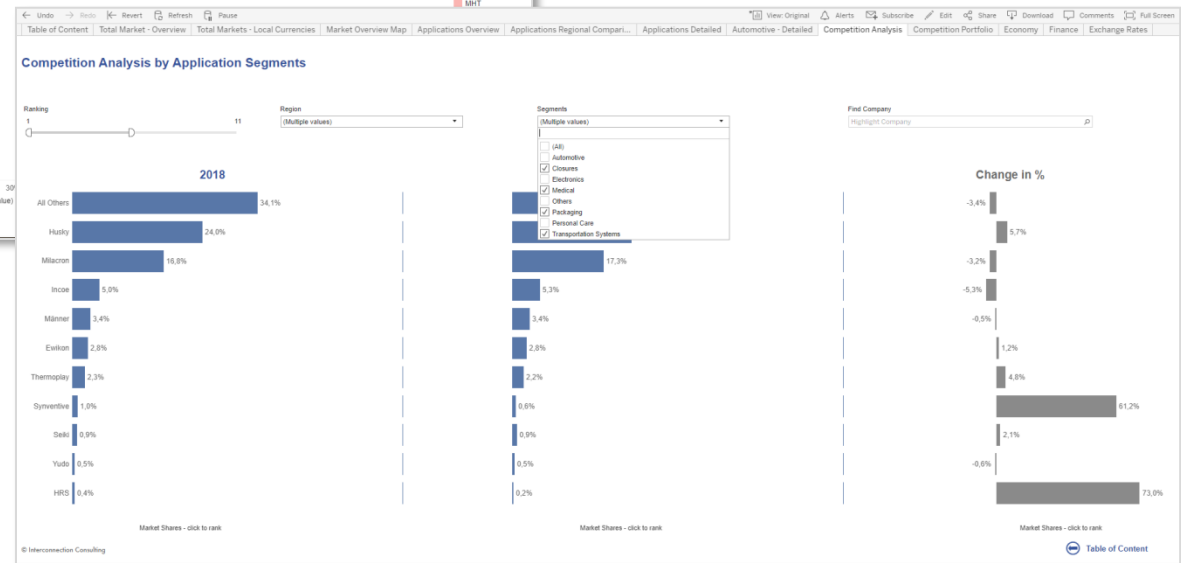
These charts contain fictive data



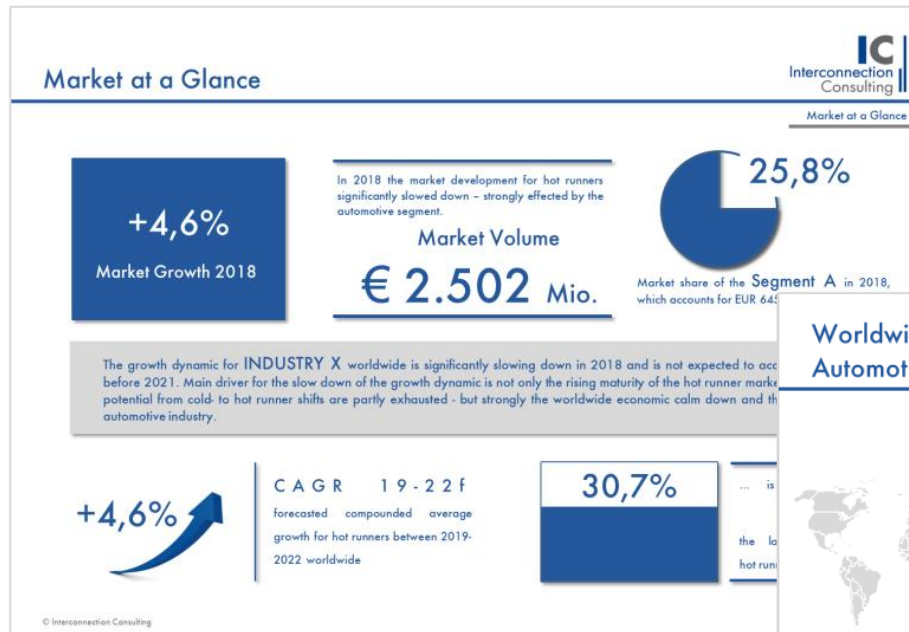
Sample Cockpits for Competition Data



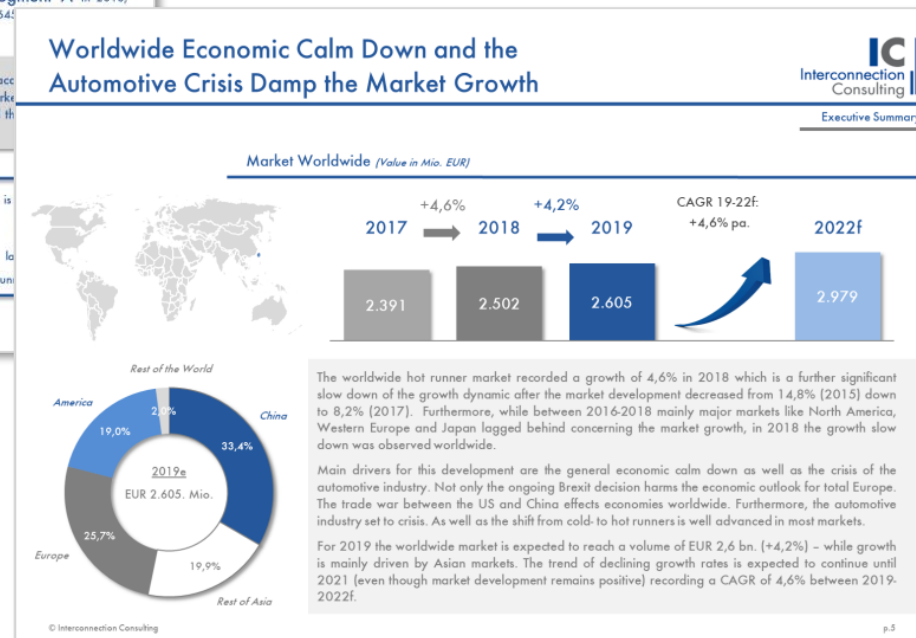
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Additional Deliverables - Executive Summary




Executive Summary as part of Tableau (fictive data)



Executive Summary as part of Tableau (fictive data)

Investment Plan for Your Market Research

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In addition to data for individual markets, aggregated data for the region can also be ordered for the countries of Western Europe and Central and Eastern Europe. The Western Europe region aggregates data from 13 countries, while the Central and Eastern Europe region summarizes data from 8 markets.

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- The price is the individual price for each edition, at least two orders of the study (order year and the following year). Price changes for the next edition must be announced by Interconnection Consulting 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.
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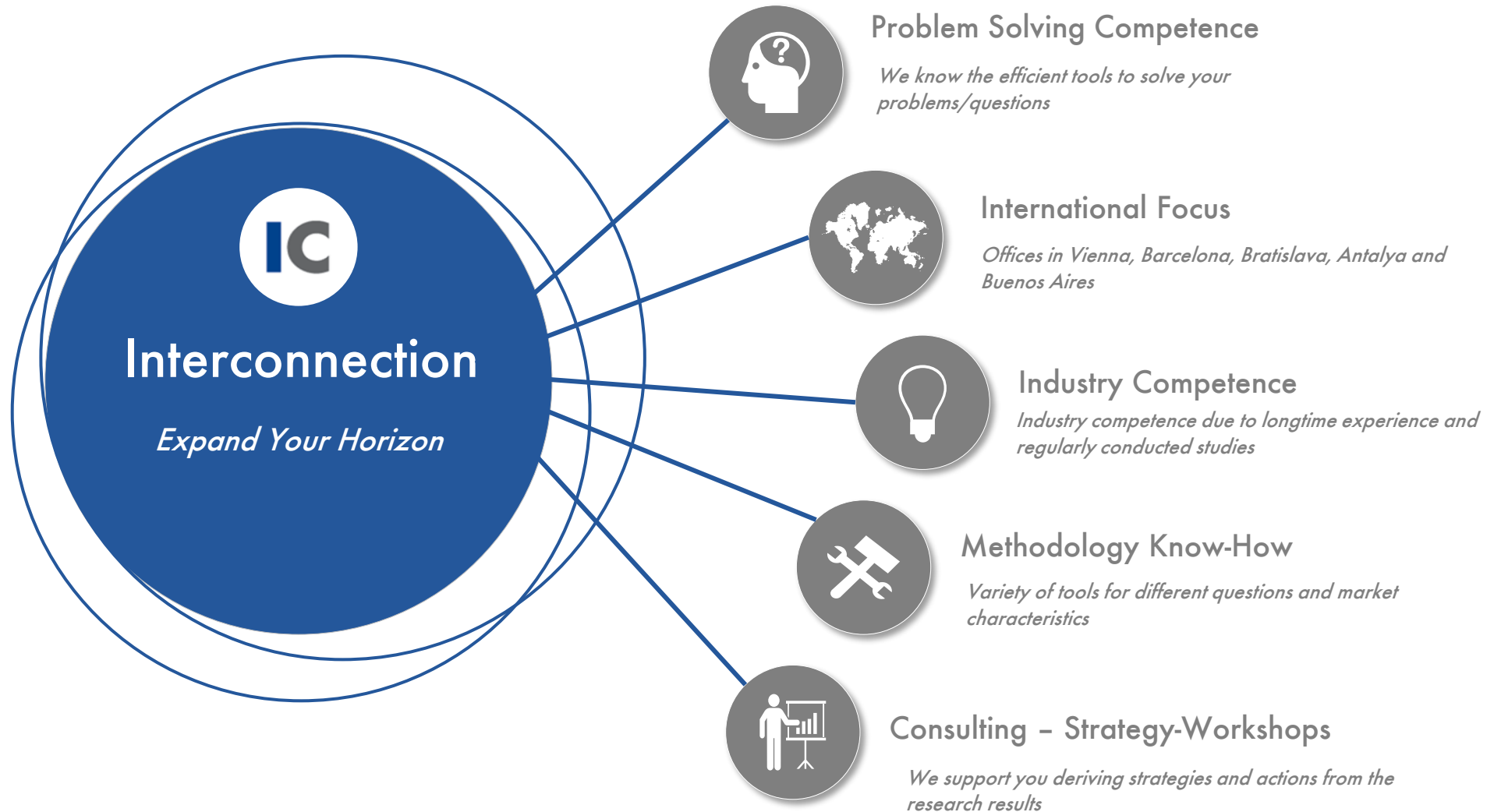
Selected References for our Market Reports

„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



Interconnection Provides Data for Corporate Decisions



Our Market-Intelligence Tools



In case of any questions
please do not hesitate to contact us!

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Yes, we would like to order the IC Market Tracking® Office Furniture Worldwide 2025

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

Please choose from the available countries/regions

- | | | | |
|---|--------------------------------------|---|--|
| <input type="checkbox"/> Western Europe** | <input type="checkbox"/> Spain | <input type="checkbox"/> Central & Eastern Europe** | <input type="checkbox"/> USA |
| <input type="checkbox"/> Austria | <input type="checkbox"/> Sweden | <input type="checkbox"/> Baltics | <input type="checkbox"/> Canada |
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