



IC Market Tracking®

Office Furniture
in Europe 2020

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Your Benefits at a Glance

Overall market Overview

You will receive an overview of the overall market in addition to individual market segments.



Competition analysis

A competition analysis with the market shares and examination of the development during previous years in terms of:

- Total Market
- Product Groups
- Distribution Channels
- Segments.



Office Furniture

in Europe
2020

Key Markets

A detailed representation of the key markets by country and forecasting for the next three years based off of our econometric forecast model.

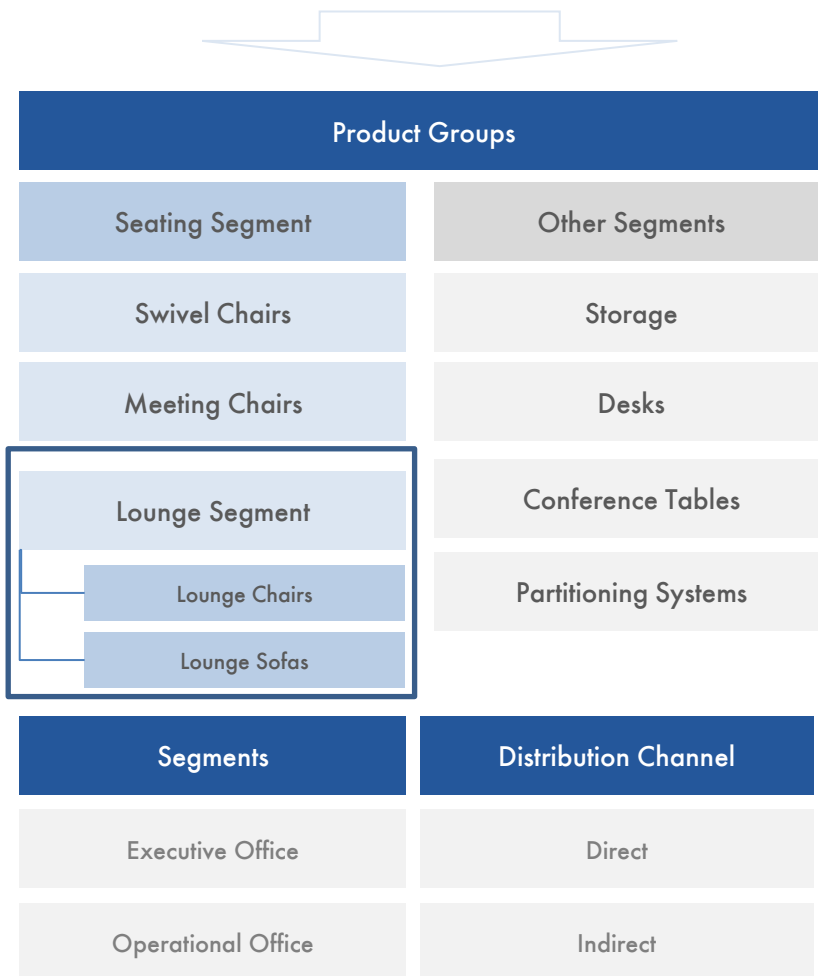


Interactive Dashboards

Graphic Presentation of the results facilitates the development of your own strategies.



Market Report Structure



Available Countries

Western Europe

- Belgium & Luxembourg
- Denmark
- Germany
- Finland
- France
- UK
- Italy
- Netherlands
- Norway
- Austria
- Spain
- Sweden
- Switzerland



Central & Eastern Europe:

- Poland
- Slovakia
- Slovenia
- Czech Republic
- Hungary
- Bulgaria
- Russia
- Romania
- Ukraine

- 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.

Product Groups	
1	<p>Seating Segment The data is presented in terms of value and quantity</p> <ul style="list-style-type: none"> Swivel Chairs Swivel Chairs Meeting Chairs Folding chairs for large meetings and arm or easy chairs for conference rooms <p>Lounge Segment Including reception / break room area chairs and sofas</p> <ul style="list-style-type: none"> Lounge Chairs Lounge Sofas
2	<p>Other The data is presented in terms of value</p> <ul style="list-style-type: none"> Storage Cupboards, filing cabinets, mobile and fixed pedestals, containers, partitions and bookcases - neither hanging files nor other office material. Desks Excluding pedestals and all types of screens (e.g. desk-up and system). Conference Tables Tables not used as permanent work place and used by multiple people (also called meeting tables). Partitioning Systems 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.

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 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).

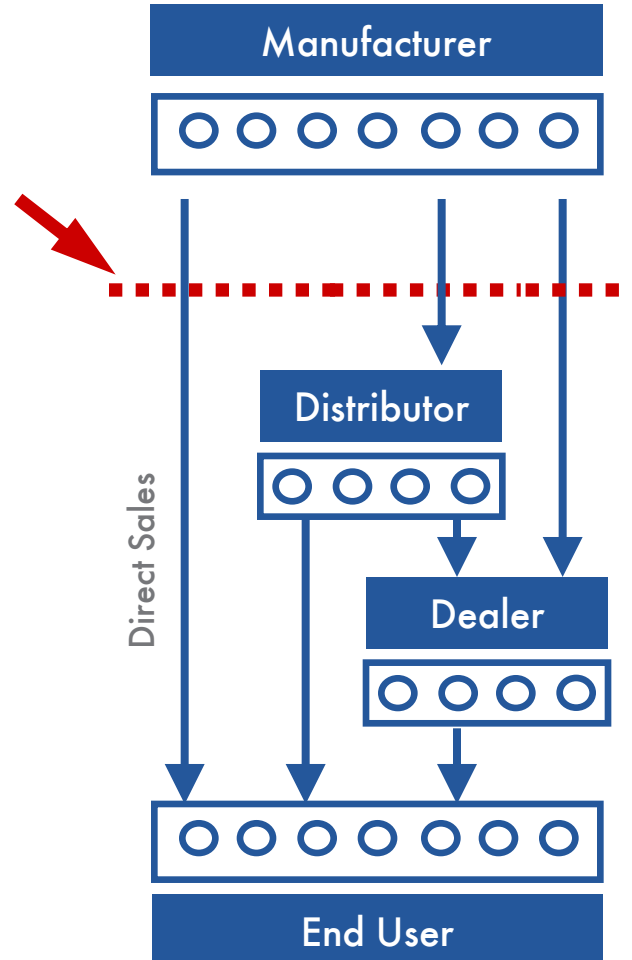
Distribution	The data is stated in terms of value.
Direct	Selling refers to selling products directly to the consumer in a non-retail environment, also to selling through own branches / sales representatives (it concerns only sales through B2B). Online sales are also included.
Indirect	Sales through all other intermediaries (specialized dealers, wholesalers, other retailers, internet – shops)
Business Segment	The data is stated in terms of value.
Executive Office	Chief Executive Offices, premium price.
Operational Office	Average working place.
Abbreviations	
CAGR	Compound Annual Growth Rate over the period 2018 – 2023f
Avg. Share	Average Share over the period 2018 – 2023f
2020e/2023f	Estimated/Forecasted

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

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.



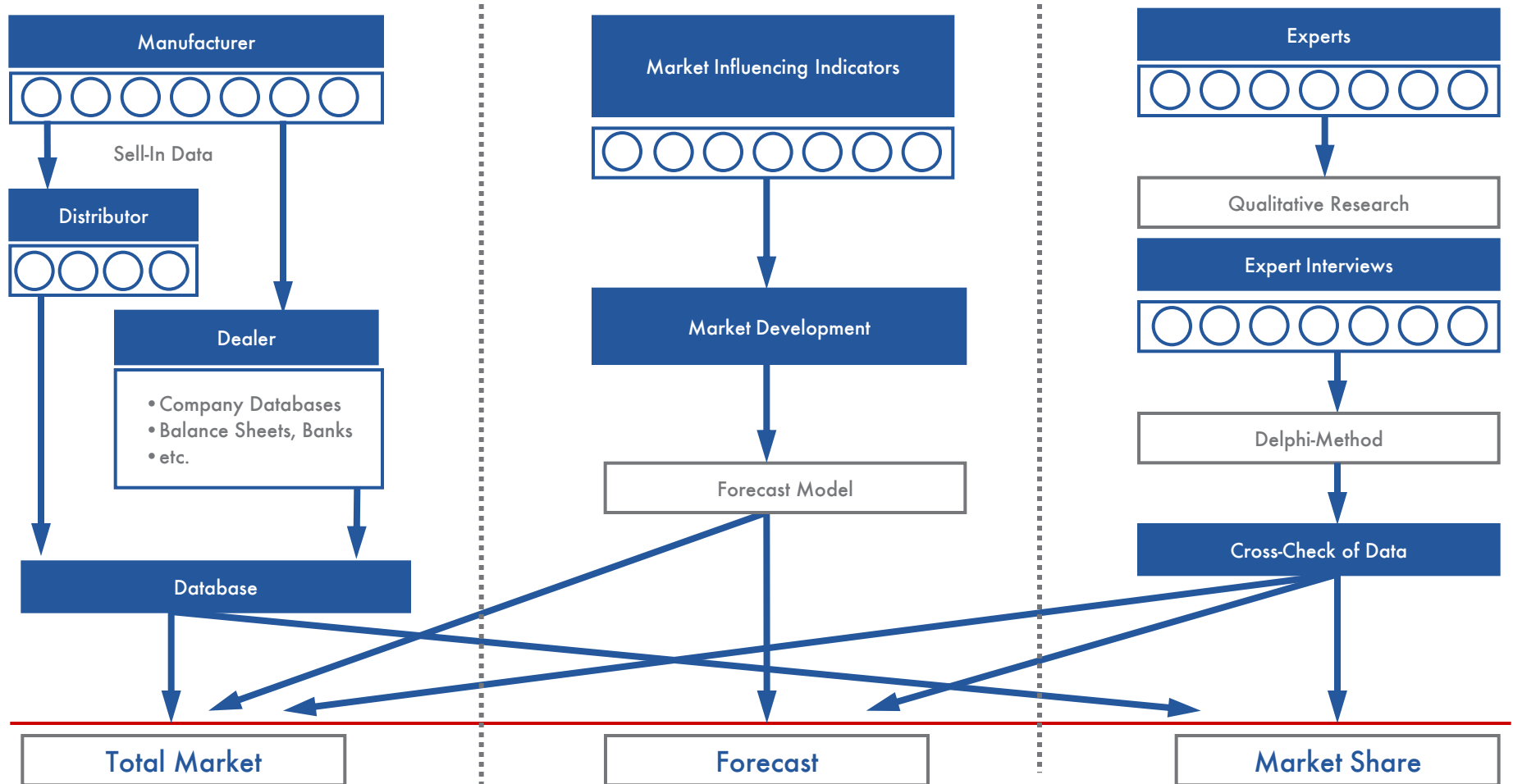
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

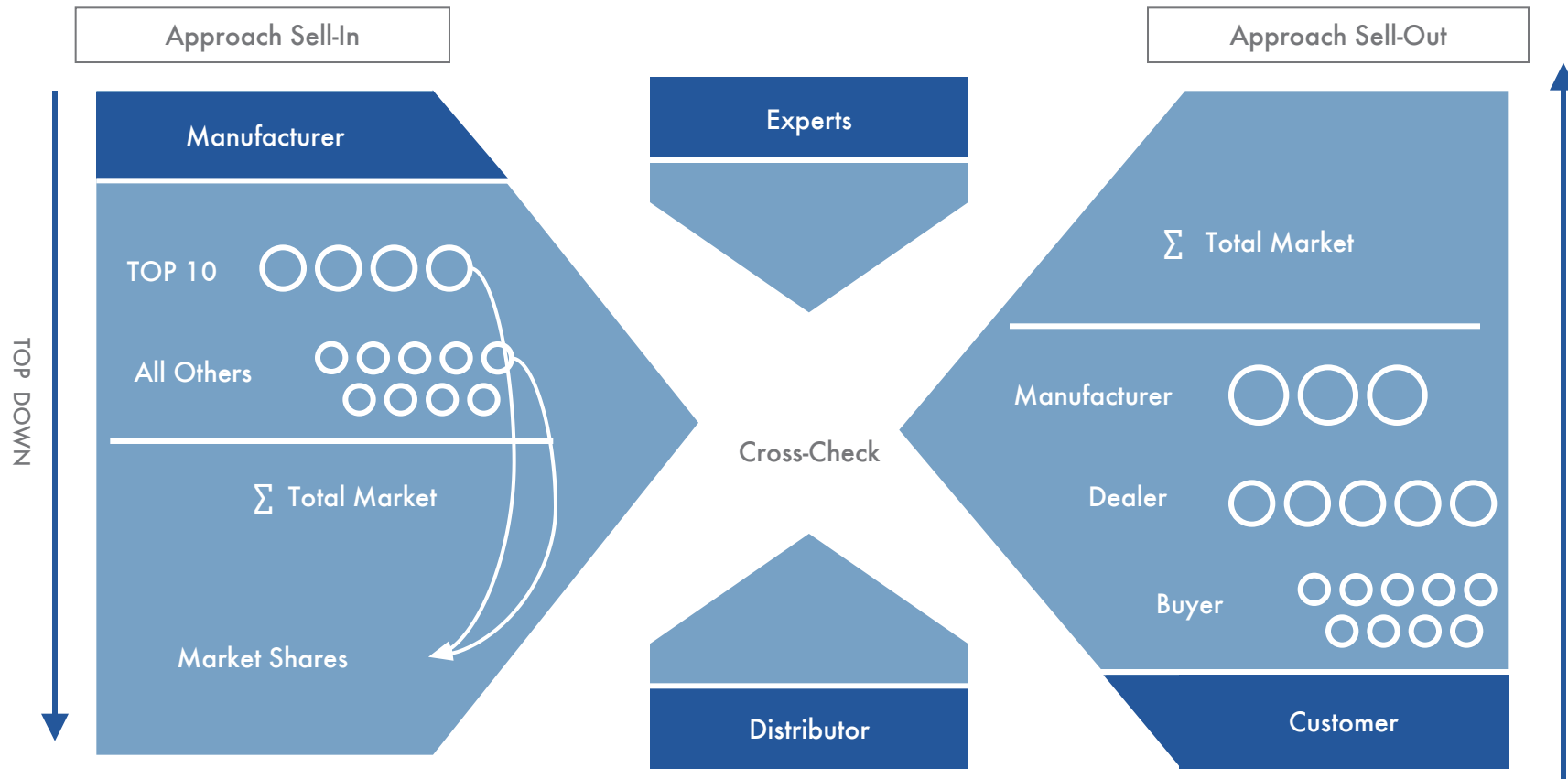
Methodology



Data of Manufacturers Aligned with Market Calculation

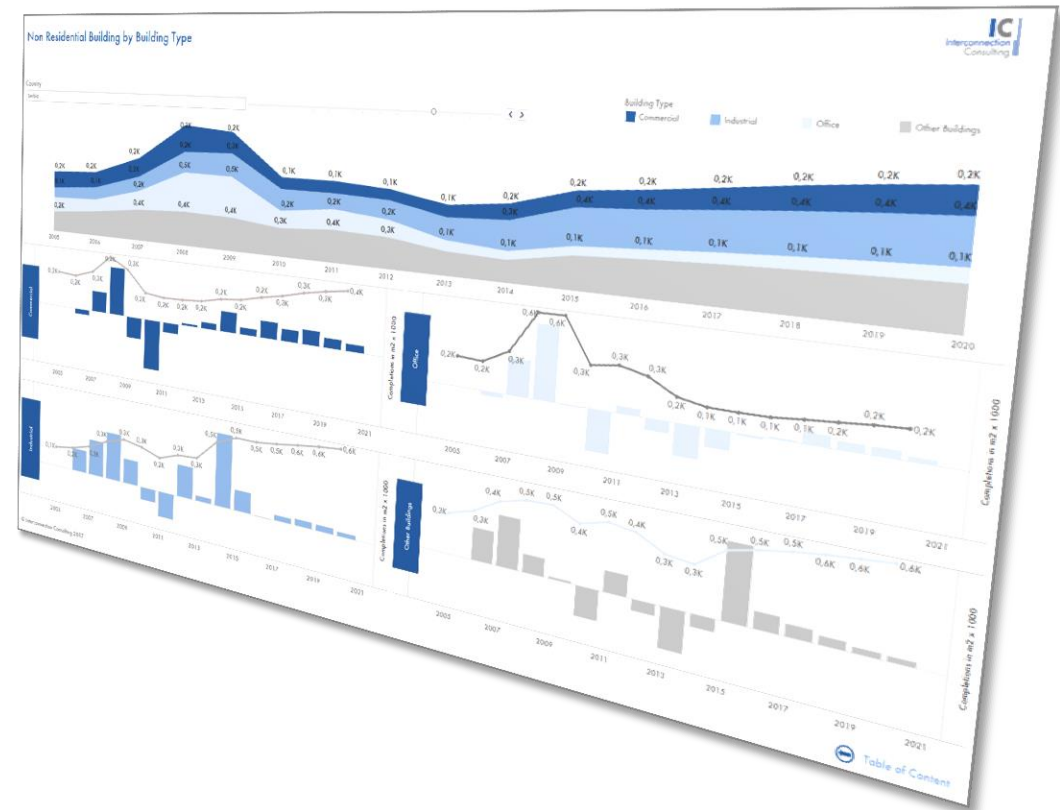
Description Structure of Survey Methodology

Methodology



Online Tool with Interactive Dashboards Presenting the Data

- The possibility to implement all data in a dashboard solution based on Tableau.
- Together we will define what the final Tableau-Cockpit should look like to present you the data in the most efficient way for your work.
- In course of a subscription of our reports, fees for the dashboard creations will only occur in the first year. In the subsequent years the updated market data will automatically be uploaded in the software.



Your Benefits at a Glance

Complex correlations

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

Interactive Dashboards
Updates annually

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

Easy online
accessability

Market data are available wherever you have internet access

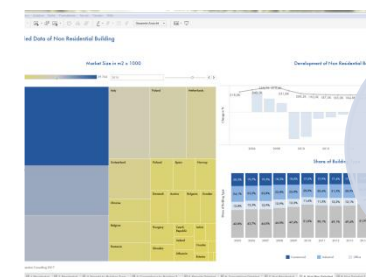
You can also export the data as .jpg, .csv or .pdf file



Market data
on country
level



2017-2023f



Market
Shares

Investment Plan for Your Market Research

	Subscription*	Single Issue
Single Country	€ 1,950,-	
Western Europe	€ 9.900,-	
Central & Eastern Europe	€ 7.900,-	
All countries	€ 15.999,-	
10 Countries Package	€ 8.900,-	

Available Countries	Western Europe	<ul style="list-style-type: none"> ■ Belgium & Luxembourg ■ Denmark ■ Germany ■ Finland ■ Switzerland 	<ul style="list-style-type: none"> ■ France ■ UK ■ Italy ■ Netherland 	<ul style="list-style-type: none"> ■ Norway ■ Austria ■ Spain ■ Sweden
	Central & Eastern Europe	<ul style="list-style-type: none"> ■ Poland ■ Slovakia ■ Slovenia ■ Czech Republic ■ Romania 	<ul style="list-style-type: none"> ■ Hungary ■ Bulgaria ■ Russia ■ Ukraine 	<ul style="list-style-type: none"> ■ Other countries on Request

* IC 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.

** Package Price taking the scale of discounts already into account.

*** 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,-.

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 Tools to Increase Your Profits



Our Ad-hoc research team disposes state of the art market intelligence tools to:

- analyze potential to increase turnover and profits
- provide an insight about customers needs and opinions
- Identify new promising markets and business segments
- Optimize your pricing strategies taking customer benefits and the competitive landscape into account, etc.



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 Report® Office Furniture in Europe

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

Please choose from the available countries

Western Europe:

- Belgium & Luxembourg
 Denmark
 Spain
 Germany
 Finland
 UK
 France
 Switzerland
 Italy
 Netherlands
 Norway
 Austria
 Sweden

Central & Eastern Europe:

- Poland
 Slovakia
 Slovenia
 Czech Republic
 Romania
 Hungary
 Bulgaria
 Russia
 Ukraine

Subscription

- Single Country EUR 1,950.- / Country
 Western Europe..... EUR 9,900,-
 Central & Eastern Europe..... EUR 7,900,-
 All countries..... EUR 15,999,-
 10 Countries..... EUR 8,900,-

Single Issue

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 Western Europe..... EUR 12,375,-
 Central & Eastern Europe..... EUR 9,875,-
 All countries..... EUR 19,998,-
 10 Countries EUR 11,125,-

	Single Issue	Subscription*
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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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Country: _____
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E-Mail: _____

Delivery Address:
(necessary if different from the billing address)

Company: _____
Name: _____
Address: _____
Post Code/Zip: _____
Country: _____
E-Mail: _____

Date

Name

Signature

***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.

Terms of Payment

Payable after receipt of invoice without discount or via Credit Card. General terms of business apply, as agreed; any disputes arising will be settled before a competent Vienna court of law – Austrian law and all corresponding EU law applies. We claim copyright protection for the work. Receiving party agrees that discrepancies in the data may occur due to different business years, (re)distribution, official (tax) fillings and other effects influencing proper estimation of the market and shares. Distribution to third parties, duplication, publication or revision, even in part, is not permitted. In case of violation the company or persons placing the order agree to pay a contract penalty of one hundred thousand Euros in each case. All prices shown exclude sales tax. Assumption of full cooperation.