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IC Market Tracking® Water Heaters in Europe 2015

- Germany
- United Kingdom
- France
- Spain
- Italy
- Poland
- Turkey



IC Market Tracking® Water Heaters in Europe 2015

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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 (Connected to Boiler, Tankless)
 - Customer Segment (Residential, Non Residential)
 - Business Segment (New Construction, Renovation)
 - Distribution Channels (Direct, Indirect)
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.



Water Heaters in

Germany

UK

France

Spain

Italy

Poland

Turkey

Market by ...

Product Types

Linked

Dedicated

Separated Indirect Cylinder

Integrated Indirect Cylinder

Combi Boilers

Buffer Storage Cylinders

Gas Storage Non-Condensing

Gas Storage Condensing

Gas Instantaneous

Electric Storage

Electric Instantaneous

Customer Segment

Residential

Non-Residential

Business Segment

New Construction

Renovation

Distribution

Direct

Indirect

For each segment the total market and market shares of the top 10 players for the last two years 2014-2015e and forecasts for the next three years are available in the study

Definition and Demarcation

Product Groups

Linked

Separated Indirect Cylinder

Allows the water that circulates around the boiler, pipes and radiators to be kept totally separate from the stored water in the cylinder that is used for bathing.

Integrated Indirect Cylinder

...is heated by a source located within the cylinder - such as an electrical immersion heater.

Combi Boilers

Combine the central heating with domestic hot water (DHW) in one device.

Buffer Storage Cylinders

...are usually installed with the solid fuel boilers, providing an efficient burning process and store excess heat for the space heating circuit

Definition and Demarcation

Product Groups

Dedicated

Gas Storage Non-Condensing

Or a standard gas storage water heater is like a water tank sitting atop of a gas fireplace with the chimney running straight up through the middle, exiting at the top

Gas Storage Condensing

A gas condensing water heater has its "chimney" or flue designed with greater surface area. The heat and combustion gases have much farther to travel before they exit the water tank, so more heat is transferred to the water in the tank.

Gas Instantaneous

Instantly heats water as it flows through the device

Electric Instantaneous

Uses electric power to heat water as it flows through the device

Electric Storage

Consists of a cylindrical vessel or container that keeps water continuously hot and ready to use.

Distribution

Direct (2-steps)

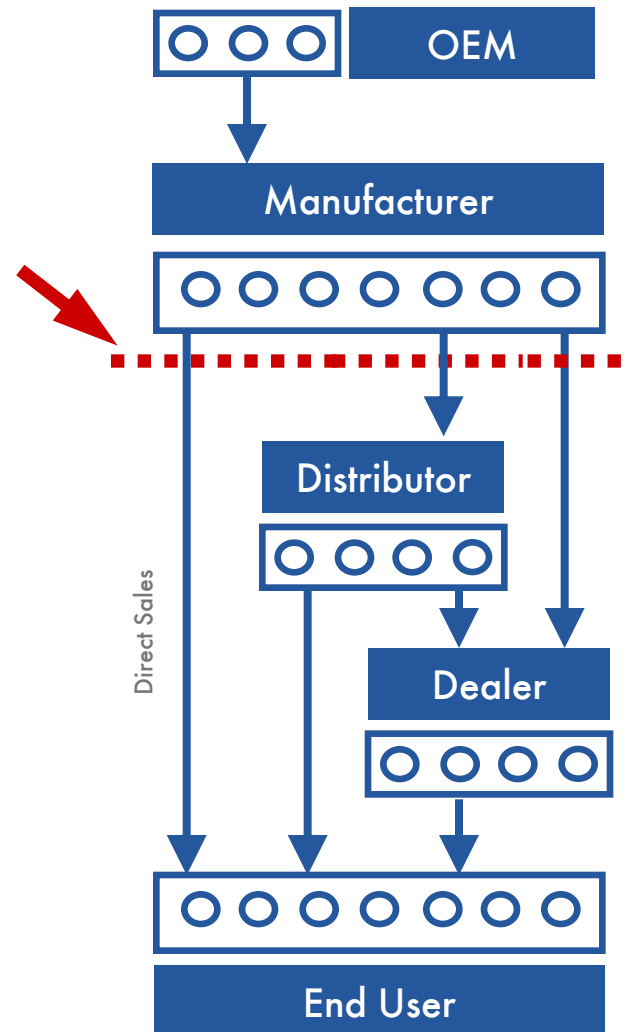
The manufacturer sells directly to installers

Indirect (3-steps)

The manufacturer sells through wholesaler network

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.

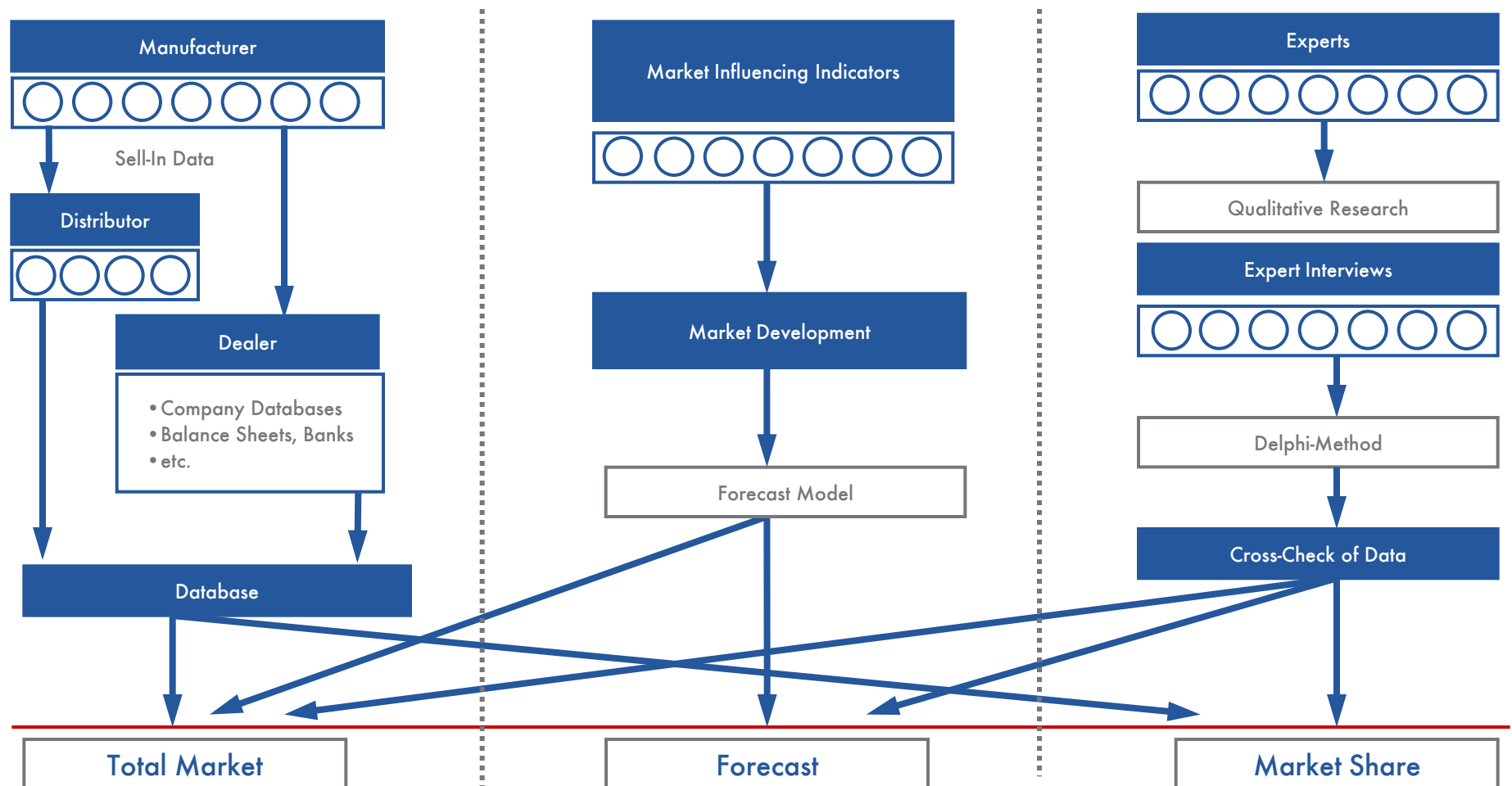


The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

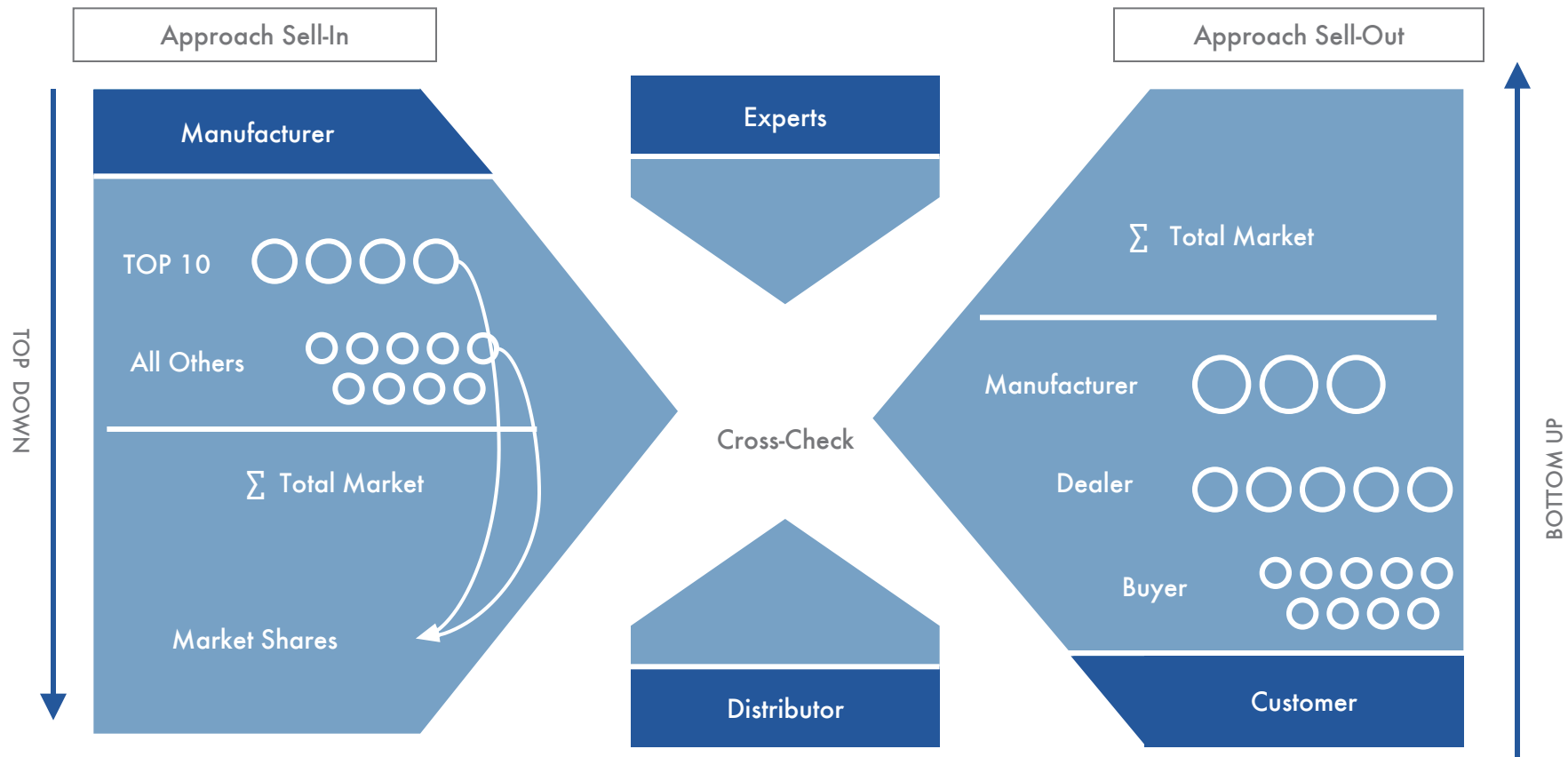
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology



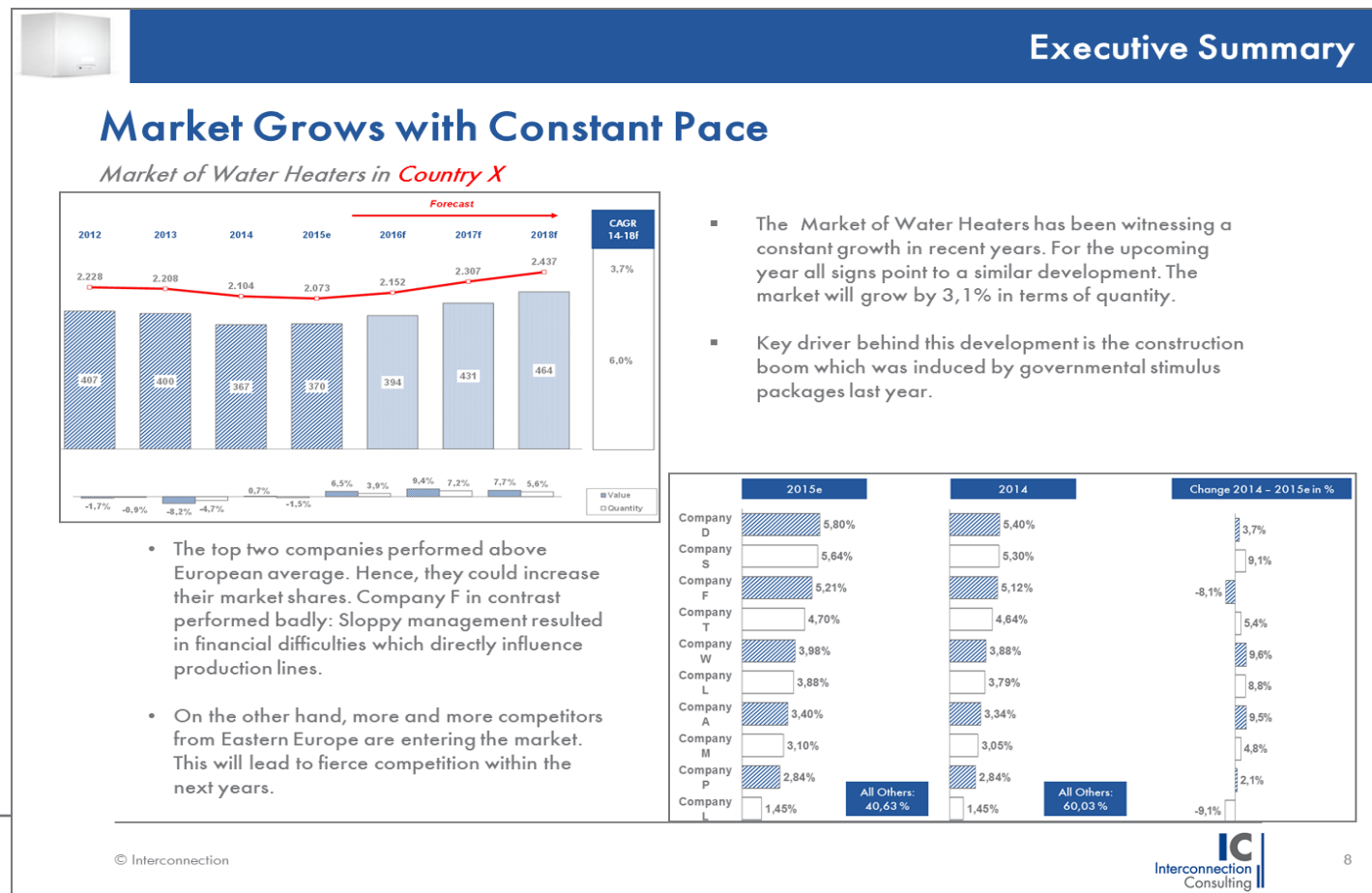
Contents of the IC Market Tracking® Water Heaters in Europe 2015

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.

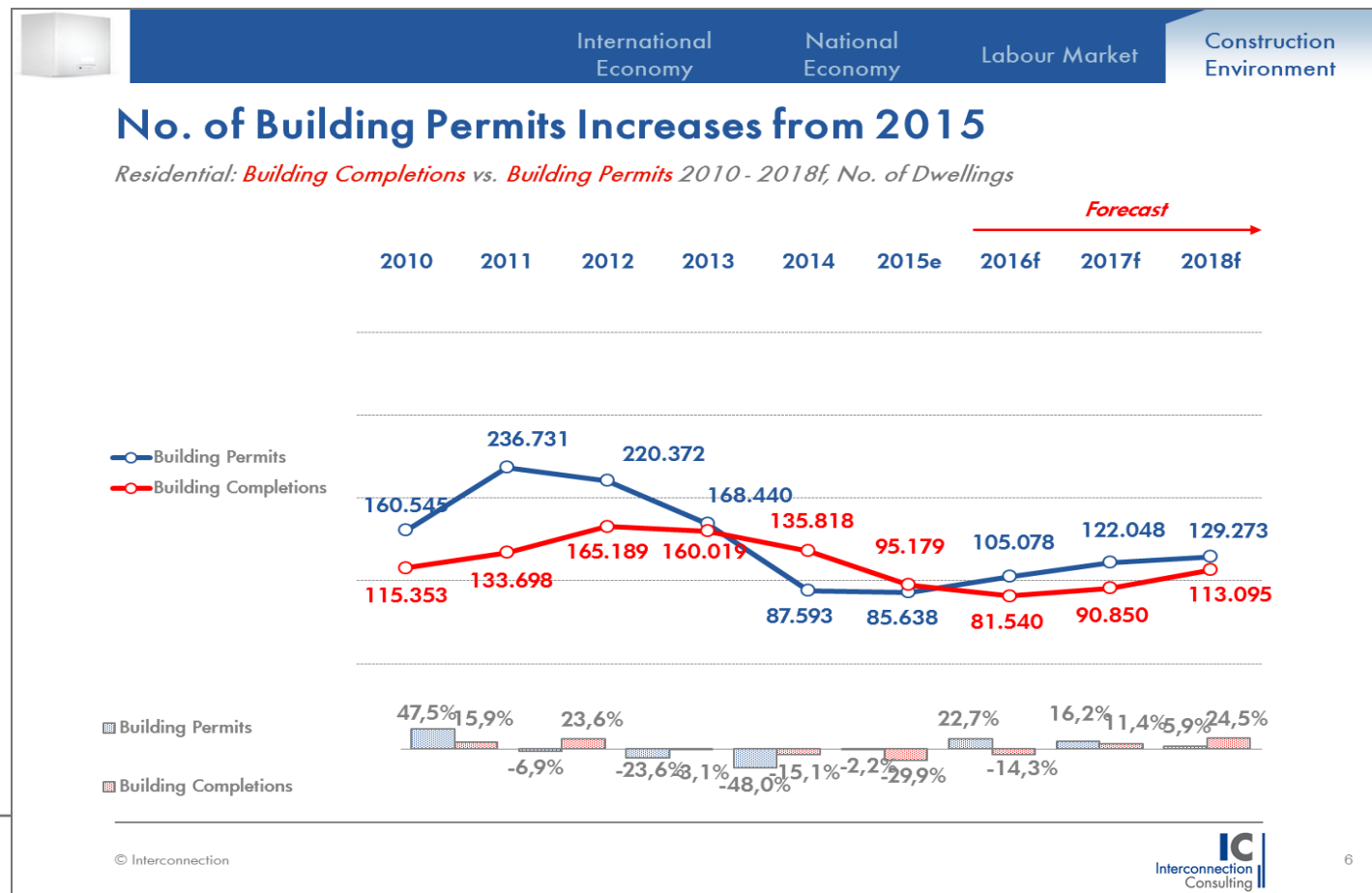
Executive Summary at the Beginning of the Report

- *The executive summary comprises all relevant information of the report in detailed and precise manner. Forecast and competition situation is highlighted.*
- *This chart shows sample figures*



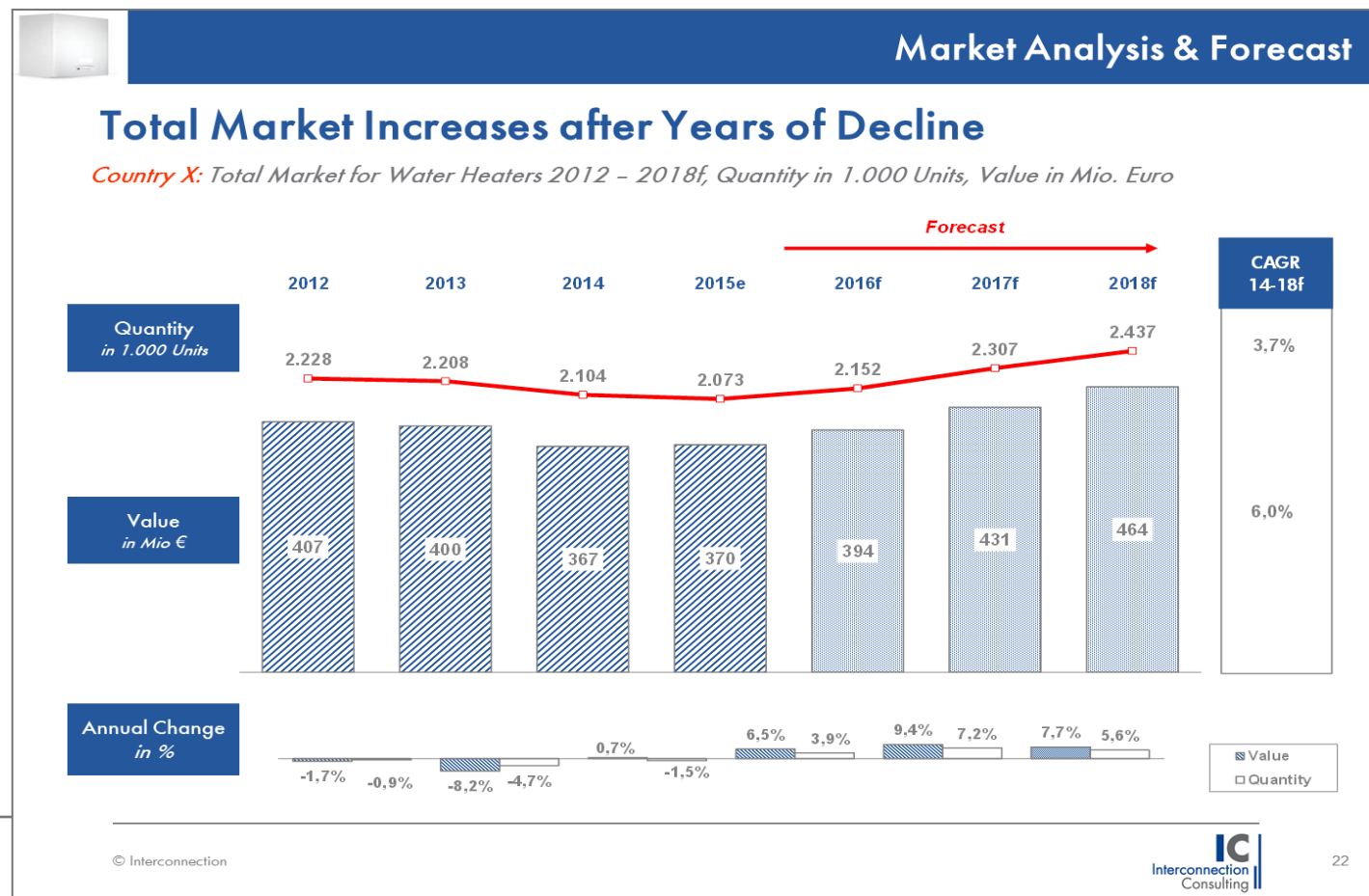
Market Environment Data of our Forecasting Model

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



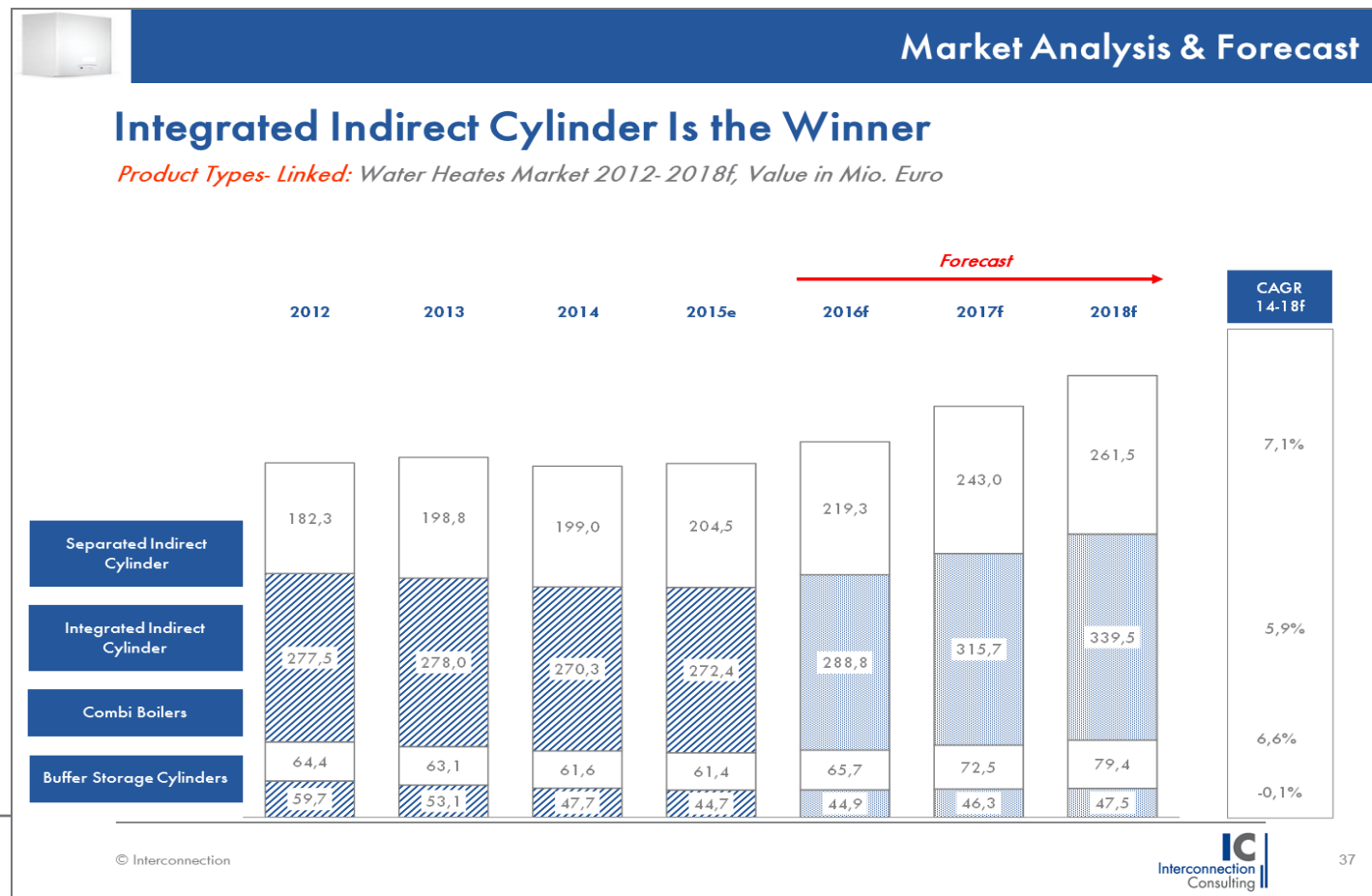
Total Market Development and Forecast

- Overview of the total market until the current year and forecast for the upcoming three years.
- This chart shows sample figures



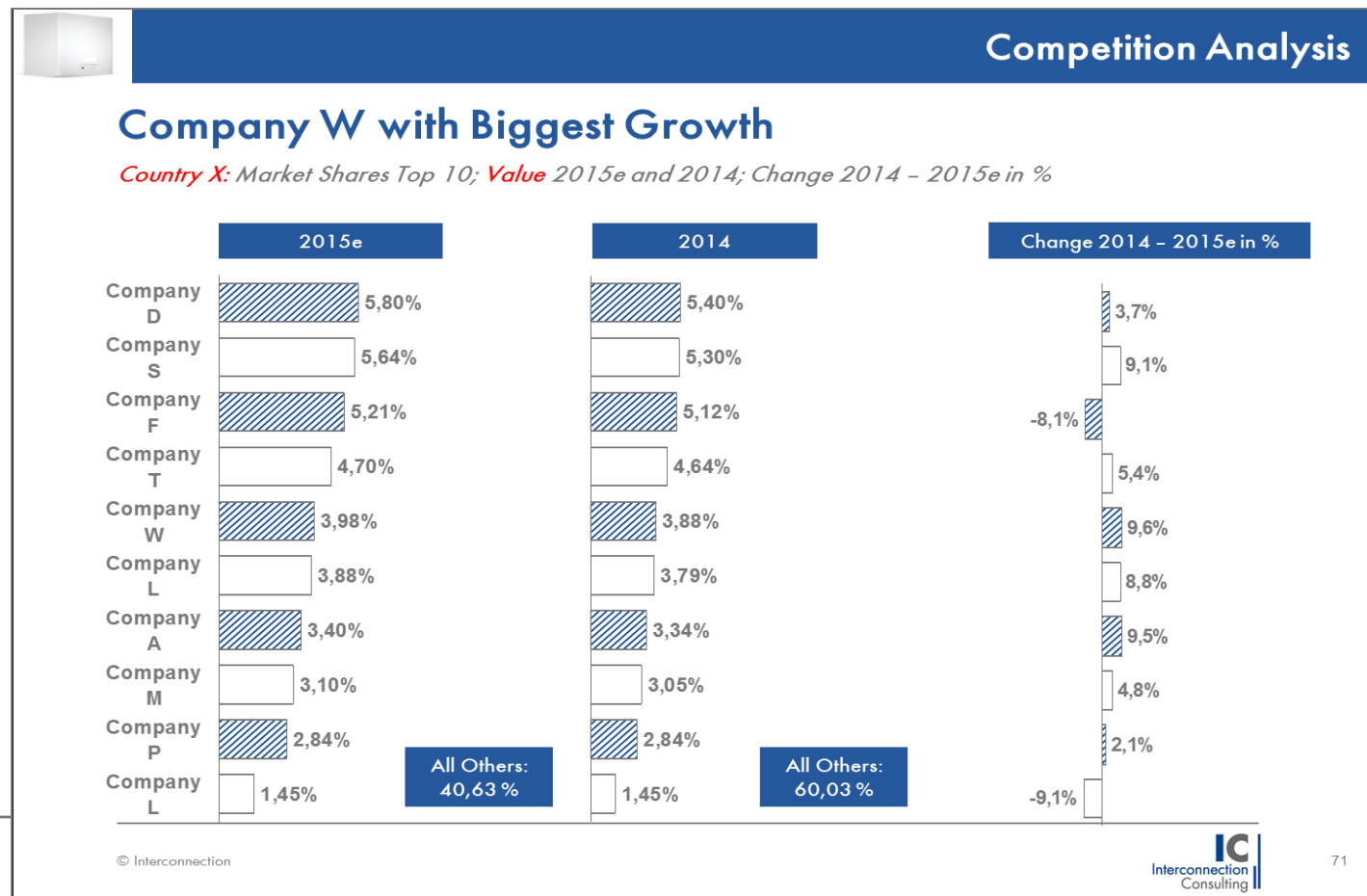
Product Group Development

- Overview of the total market until the current year and forecast for the upcoming three years.
- This chart shows sample figures



Competition Analysis and Market Shares

- *Market Shares of the Top 10 market leaders of the Water Heaters Market*
- *This chart shows sample figures*



Pivot Table

- Additionally to the visualised report a Pivot Table will be included
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

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	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
Ø Price in € (Classes)	(All)

Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

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	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
Ø Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.925	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47



IC Market Tracking® Water Heaters in Europe 2015

		Scale of Discounts from a buying price of	
	Subscription *	Single Issue	
Single Country	€ 2.150,-	€ 2.500,-	€ 5.000 -10%
Europe Total **	€ 10.084,-	€ 11.725,-	€ 7.500 -20%
			€ 10.000 -25%
			€ 15.000 -33%
Available Countries	GER	ITA	FRA
			UK
			ESP
			POL
			TUR

* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

** Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

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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:

- You only pay **2.150** instead of **2.500** per country, or for the whole report **10.084** instead of **11.725 Euro**.
- You will receive the **newest edition** right after Publication.
- Subscription Customers are offered an optional **free web conference**, where the essence of the results of the study can be presented. Furthermore you can directly talk to the author of the study to receive background information on the data and to clarify any open questions.
- **Info-Hotline:** For the period of one year you can state questions to the author of the study, furthermore the team of Interconnection will assist you for free in case any methodologic questions in the area of market research will arise in your company.
- As far as possible, we can also put together **flexible subscription packages** (e.g. Biennial subscription, change of countries)
- After receiving 2 editions of the subscribed report, the **subscription can be cancelled without any problems**.



Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data within the HVAC 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 the construction industry.
- Next to market data we offer for the energy 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.





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

Web**verstärker**



E Commerce Insights
Search Engine Marketing
Web Channel Analysis

„IC is a permanent partner of ours and provides helpful data for decisions.“

Mr. Bernd Blümmers

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

Customers of our Reports





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

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General Information

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 100 per Country
- Optional: Hard Copy

Price

- per country from 2.150 €
- all regions from: 10.084 €
- Hard Copy: 150 €

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.

Contents 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: main economic indicators.
Import & export statistics.

Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, energy, business segments and Distribution Channels.

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

Countries

Germany, UK, Turkey, Italy, Spain, Poland, France

Product Groups

Linked, Tankless

Customer Segment

Residential, Non Residential

Business Segment

New Construction, Renovation

Distribution Channel

Direct, Indirect.

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.

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Yes, we would like to order the following market reports IC Market Tracking® Water Heaters in Europe 2015

(Please print out the order form and mark your desired countries for the report)

Country/Region	Single Issue	Subscription*
<input type="checkbox"/> Germany	€ 2,500	€ 2,150
<input type="checkbox"/> Italy	€ 2,500	€ 2,150
<input type="checkbox"/> France	€ 2,500	€ 2,150
<input type="checkbox"/> Spain	€ 2,500	€ 2,150
<input type="checkbox"/> UK	€ 2,500	€ 2,150
<input type="checkbox"/> Poland	€ 2,500	€ 2,150
<input type="checkbox"/> Turkey	€ 2,500	€ 2,150
<input type="checkbox"/> All 7 Countries**	€ 11,725	€ 10,084

** Prices with regards of the scale of discounts.

Order Form

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- ☐ Translation in another language (price on request)

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> From € 7,000	-20%
> From € 10,000	-25%
> From € 15,000	-33%

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Date	Name	Signature
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