

IC Market Tracking®
Underfloor Heating in
Europe 2024

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2020 – 2023 for the total market development as well as
 - Regions
 - Floor Heating Systems
 - Customer Segment
 - Building Types
 - Business Segment
- Forecasts from 2024 – 2027 for the total market as well as each analyzed region and segments.
- Annually updates of the data

COMPETITION ANALYSIS

- Market shares of the top players for 2022-2023
 - Market Shares on the total market
 - Market Shares per each analyzed segment

MARKET DRIVERS

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



Market & Competition Analysis

Market Volume

Market Growth

Trends

What Do You Get - Your Benefits at a Glance

Presentation of the Data and Deliverables

Market Intelligence Tool Access and Deliverables

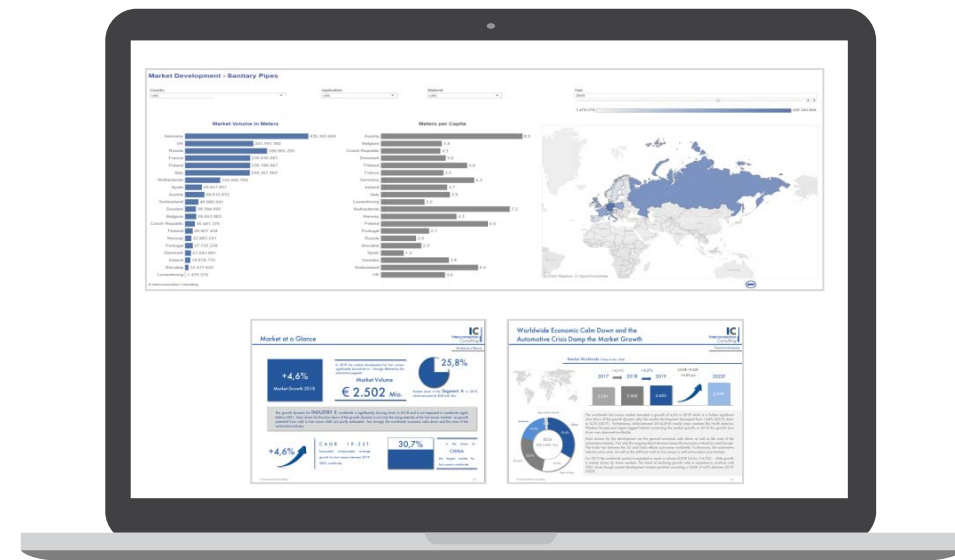


ONLINE-COCKPITS

- 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

- Infographics summarizing the market and providing regional comparisons and contrasts
- Executive Summary dashboards can easily be exported to individual executive reports as PDF.



Market Intelligence Tool and Reports



Online Dashboards

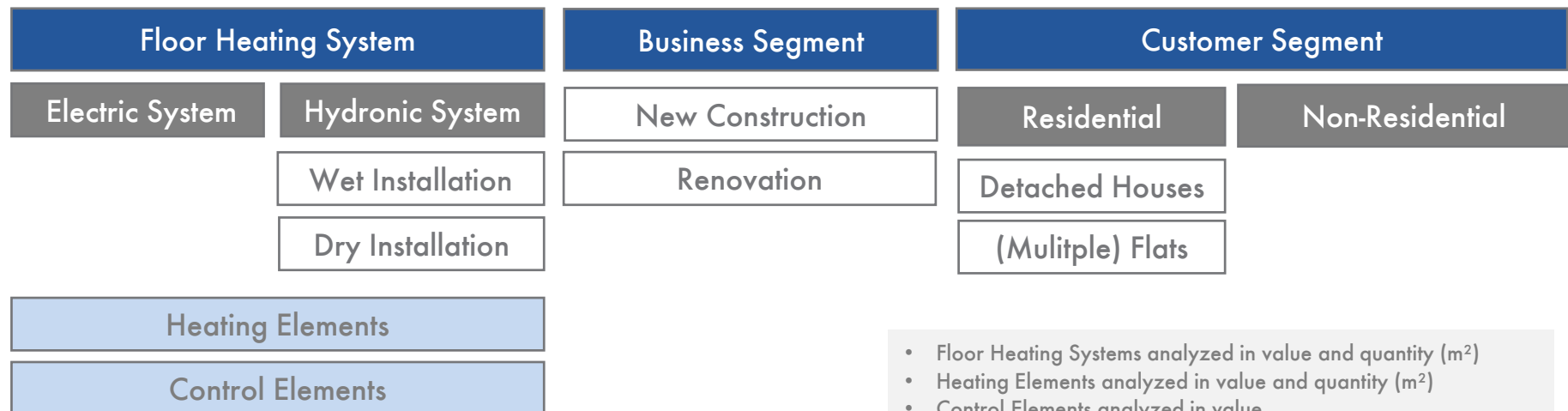
Executive Summary

Pivot Table

IC Market-Tracking® Underfloor Heating in Europe 2024



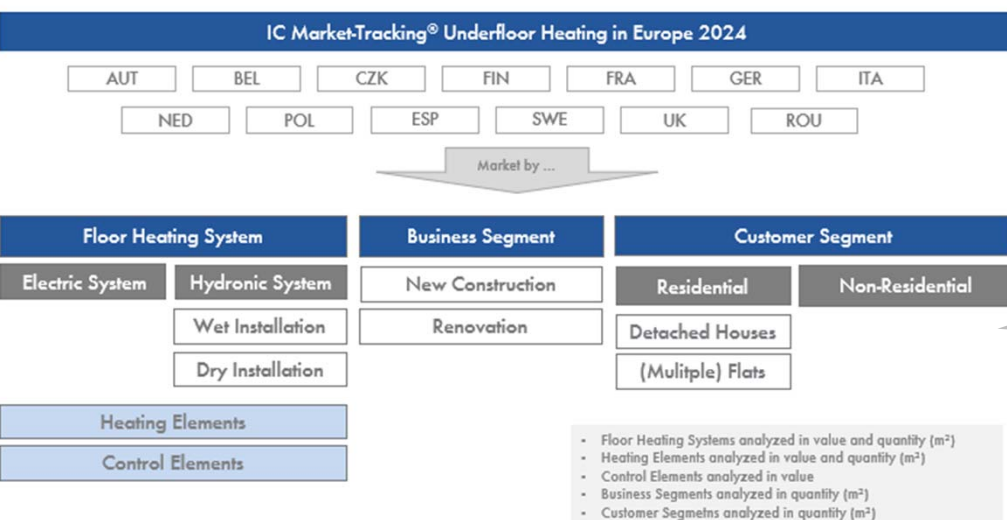
Market by ...



- Floor Heating Systems analyzed in value and quantity (m²)
- Heating Elements analyzed in value and quantity (m²)
- Control Elements analyzed in value
- Business Segments analyzed in quantity (m²)
- Customer Segments analyzed in quantity (m²)

The study includes total market and development from 2022 -2027f for each segment and market shares of Top Players for 2022 and 2023

Market Structure - Interpretation



- Market data is available for each country separately as well as aggregated for the country package purchased.

- Each country report includes data for the three different analysed segments separately as well as aggregated for the total market of underfloor heating in terms of value and quantity.

- The market volume of segments is further subdivided in sub-segments.
 - ⇒ For instance, the market volume of hydronic systems is further broken down by Wet and Dry Installations

Heating System

Hydronic System

Hydronic heating with hot water in tubes

Electric System

Electric heating with flexible heating elements including cables, pre-formed cable mats, bronze mesh, carbon films, etc.

Wet System

Systems are installed in the screed

Dry System

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

Heating Elements

Including plates and pipes as well as mounting elements and fittings

Control Elements

Including distribution switchboards, valves, thermostats, gateways

Customer Segment

Residential

Buildings for housing

Detached Houses

One- and Two Family Houses

Multi-Storey Buildings

Dwellings in Multi-Storey Buildings

Non Residential

Buildings for commercial purpose such as offices, shops, restaurants as well as buildings for education, administration, etc.

Business Segment

New Construction

Application in new buildings

Renovation

Application in existing building

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 Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer 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

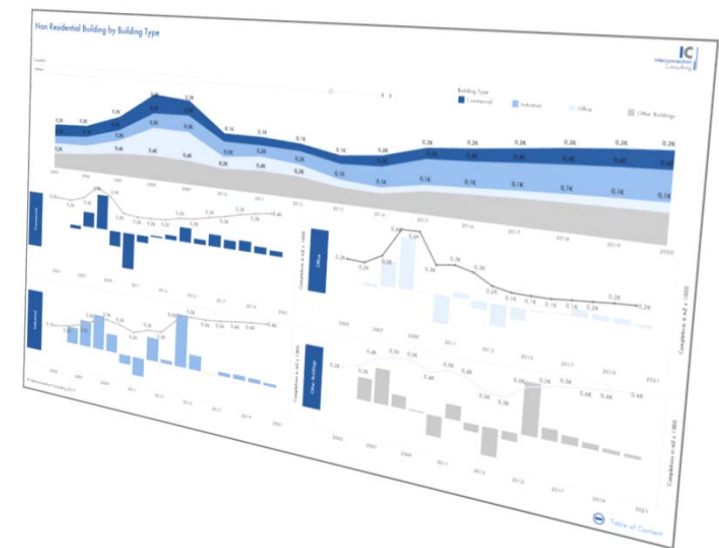
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

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

Easy online
accessability

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



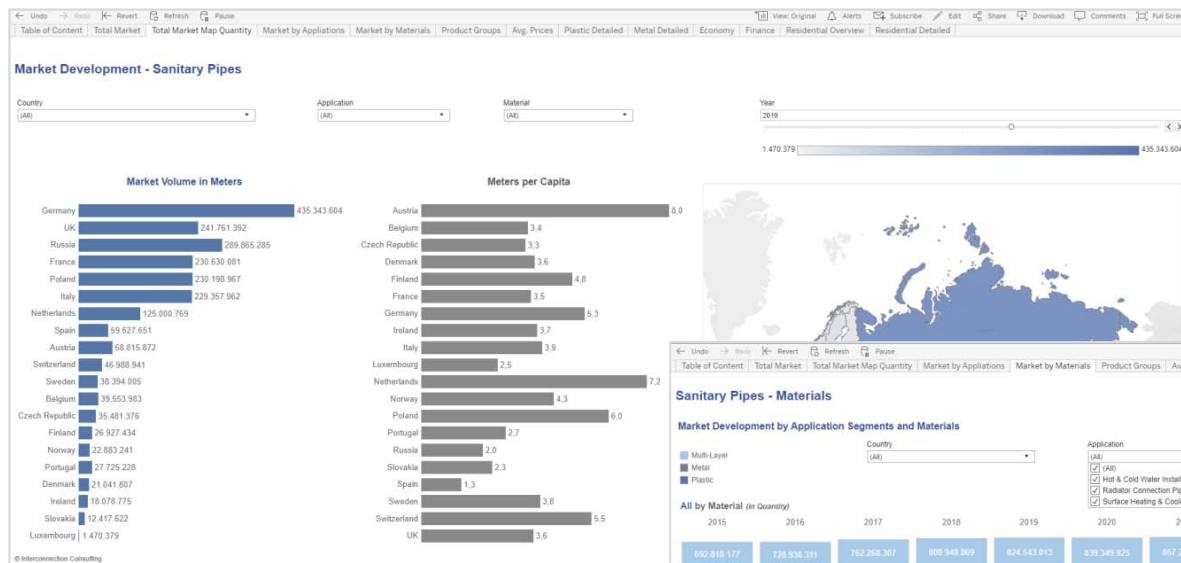
In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is waived as well as for any subscription order exceeding 2 countries or regions. For all other options, price for Tableau cockpit costs € 500,-.

Usability of the Market Intelligence Tool

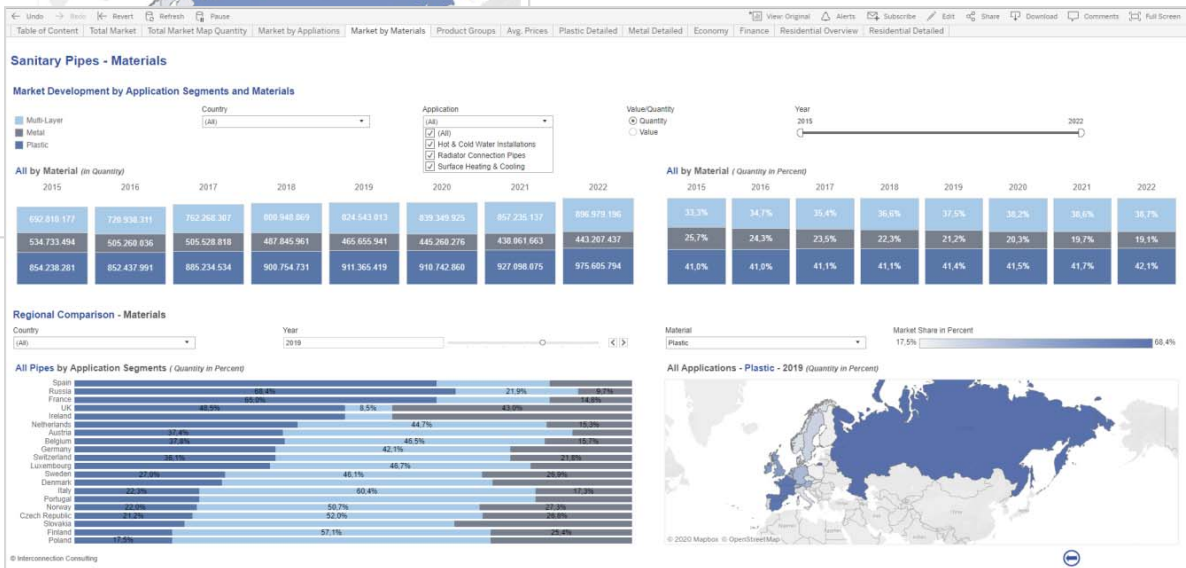
Let's Put it in a Video...



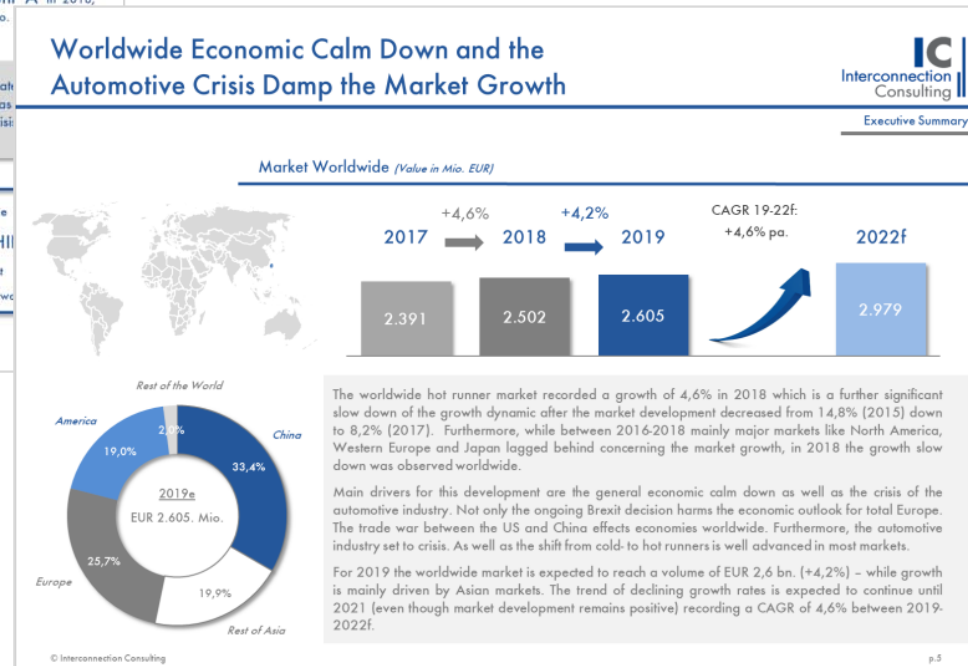
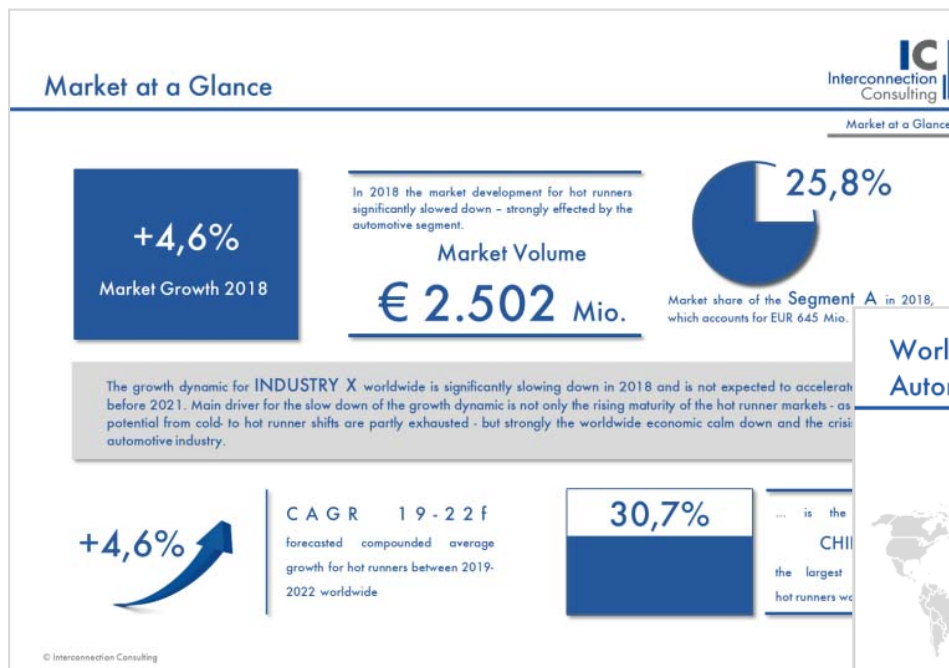
Sample Cockpits for Market Analysis Data



This chart contains fictive data



Additional Deliverables - Executive Summary



Content of the Report

Overview of the Included Dashboards

EXECUTIVE SUMMARY

- Total Market Overview
- Summary of Trends on the total market as well as analyzed segments

TOTAL MARKET

- Total Market – Regional Comparison in terms of value and quantity
- Total Market Development by regions in terms of value and quantity

FLOOR HEATING SYSTEM

- Regional Comparison in terms of value and quantity
- Regional market development in terms of value and quantity
- Analysis of average prices per analysed segment and regional comparison

CUSTOMER SEGMENT

- Regional Comparison in terms of value and quantity
- Regional market development by New construction and by Renovation

CUSTOMER SEGMENT

- Regional market share by residential and non- residential
- Regional market development by residential and non- residential
- Regional comparison of market share of residential: Detached houses and multiple storey residential buildings in terms of amount
- Regional market development by Detached houses and multiple storey residential buildings in terms of amount

MARKET DRIVERS

- GDP, personal disposable income, private consumption, recorded unemployment
- Residential completions and permits for building types such as one/two family dwellings and flats

Investment Plan for Your Market Research

IC Market Tracking® Underfloor Heating 2024

Prices & Conditions

	Subscription *	Single Issue	Available Countries			
Single Country	€ 3.999,-	<div>+25% for Single Issues</div>	AUT	BEL	CZK	ESP
3 Countries	€ 9.500,-		FIN	FRA	GER	ITA
5 Countries	€ 15.000,-		NED	POL	ROU	SWE
7 Countries	€ 21.998,-		UK			
10 Countries	€ 30.995,-					
All 13 Countries	€ 39.992,-					



BUY NOW

***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.

In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit 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,-/license.

Selected References

„ IC reports are a very helpful direction sign for continuously changing markets.“

Mr. Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe

„The IC Market-Tracking® Residential Ventilation was a good support for our analysis of the German ventilation market. The study provides a high level of differentiation and is very user friendly.“

Ulf Hörman

Business Development Director, Swegon SE



Interconnection Provides Data for Corporate Decisions



Our Market-Intelligence Tools



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

Interconnection Consulting
Getreidemarkt 1, A-1060 Vienna

Andreas Kuballa – Market Analyst
Tel + 43 1 585 46 23 - 68
kuballa@interconnectionconsulting.com

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

Interconnection Consulting
Vienna • Oberstdorf • Lviv • Bratislava • Buenos Aires

www.interconnectionconsulting.com



IC
we show you the way

Yes, we would like to order the IC Market Tracking® Underfloor Heating in Europe 2024

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

Please choose from the available countries

- | | | | |
|---|--------------------------------------|---------------------------------|-----------------------------|
| <input type="checkbox"/> Austria | <input type="checkbox"/> France | <input type="checkbox"/> Norway | <input type="checkbox"/> UK |
| <input type="checkbox"/> Belgium | <input type="checkbox"/> Germany | <input type="checkbox"/> Poland | |
| <input type="checkbox"/> Czech Republic | <input type="checkbox"/> Italy | <input type="checkbox"/> Spain | |
| <input type="checkbox"/> Finland | <input type="checkbox"/> Netherlands | <input type="checkbox"/> Sweden | |

- ☐ Subscription* Single Country - Price per Year EUR 3.999,-
☐ Subscription* 3 Countries - Price per Year EUR 9.500,-
☐ Subscription* 5 Countries - Price per Year EUR 15.000,-
☐ Subscription* 7 Countries - Price per Year EUR 21.998,-
☐ Subscription* 10 Countries - Price per Year: EUR 30.995,-
☐ Subscription* All 13 Countries - Price per Year EUR 39.992,-

In case of interest for a single issue of the report, please contact the responsible analyst.
Andreas Kuballa – kuballa@interconnectionconsulting.com – Tel.: +43 1 585 46 23 - 68

Billing Address:
(please fill in the data completely)

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

Company: _____
Name: _____
Address: _____
Post Code/Zip: _____
Country: _____
VAT identification number: _____
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. We claim copyright protection for the work. 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. Interconnection reserves the right to use the client's logo as reference until revocation.