



we show you the way

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IC Market Tracking[®]

Commercial and Industrial Ventilation Systems in Europe 2017

- Germany
- UK
- France
- Italy
- Poland

Benefit	Page 03
Market Structure	Page 04
Methodology	Page 07
Content of the Report	Page 10
Examples	Page 11
Prices	Page 17
References	Page 21
Contact	Page 22
Factsheet	Page 23

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
 - Product Groups (Decentralized Ventilation Units, Compact Air - Handling Units, Modular Units)
 - Size Groups
 - Application Fields (Office, Commercial, Industry, Others)
 - Split according to Heat Recovery
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.



Commercial and Industrial Ventilation Systems in Europe 2017



Product Groups	Size Groups	Application Field	Heat Recovery
Compact Air - Handling Units	500 - 5.000 m ³ /h	Office	With HR
Modular Units	5.000 - 15.000 m ³ /h	Commercial	Without HR
	15.000 - 50.000 m ³ /h	Industry	
	> 50.000 m ³ /h	Other	

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

Definition and Demarcation

Product Groups

Air - Handling Units

Modular Units

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

Pre-configured devices in which multiple functions are linked. Ventilation is controlled centrally and individual rooms are linked via channel systems with the device.

Flexible ventilation devices that are configured to meet specific customer requirements in a modular system. The combination possibilities are very wide through many built-in components

Size Groups

500 – 5.000 m³/h

5.000 – 15.000 m³/h

15.000 – 50.000 m³/h

> 50.000 m³/h

Ventilation units with the volume flow 500 – 5.000 m³/h

Ventilation units with the volume flow 5.000 – 15.000 m³/h

Ventilation units with the volume flow 15.000 – 50.000 m³/h

Ventilation units with the volume flow more than 50.000 m³/h

Definition and Demarcation

Application Field

Office

Buildings whose area is mostly used for offices.

Commercial

Buildings whose area is mostly used for commercial purpose such as shopping center

Industry

Buildings for industrial manufacturing and production processes, such as: refineries, steel mills, etc.

Others

Include all other types of buildings in the areas of education, entertainment, health care, etc.

Heat recovery

With HR

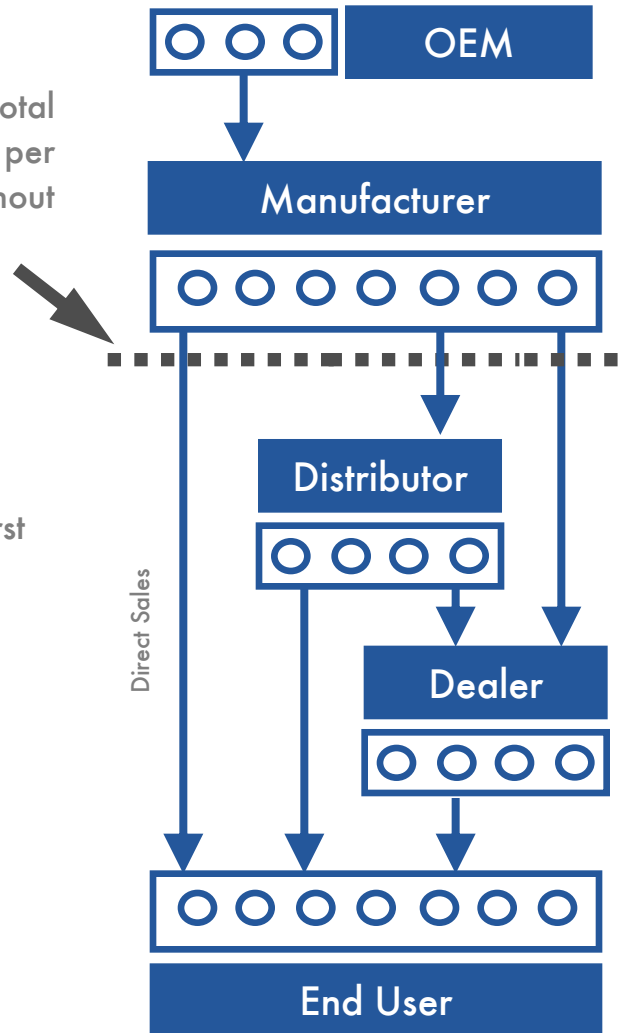
Units with heat recovery

Without HR

Units without heat recovery

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.



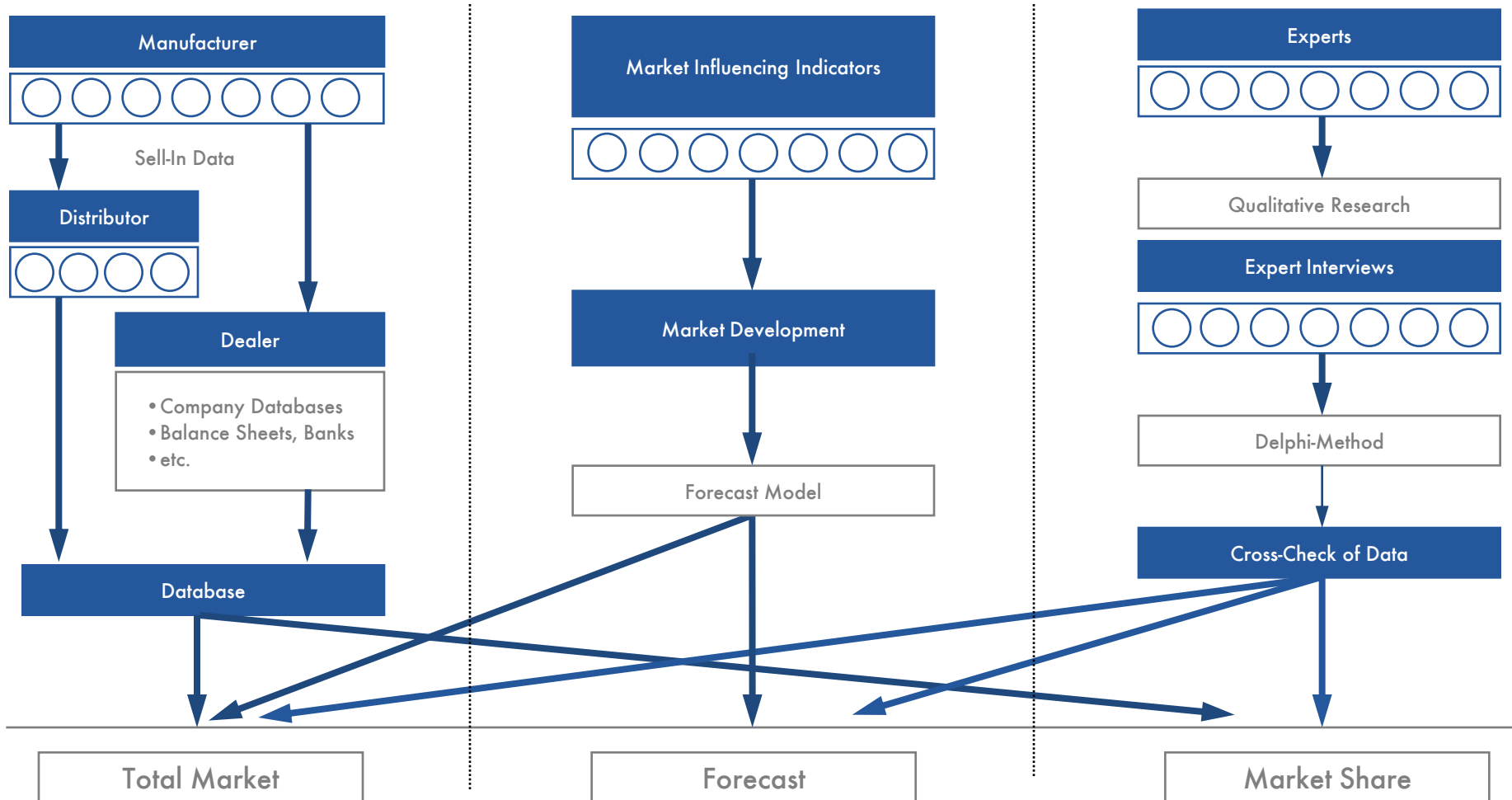
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

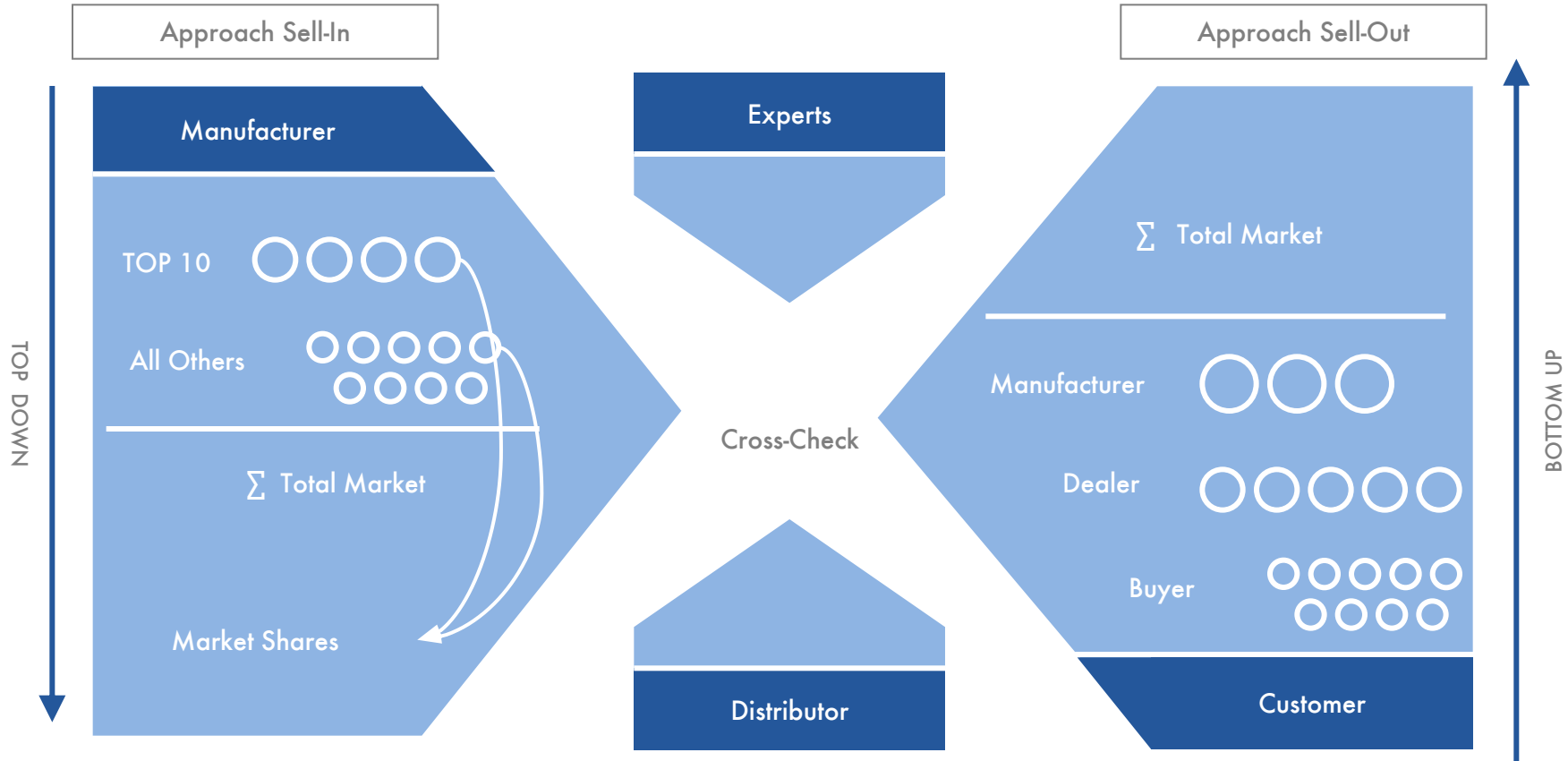
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

Methodology



Data of Manufacturers Aligned with Market Calculation

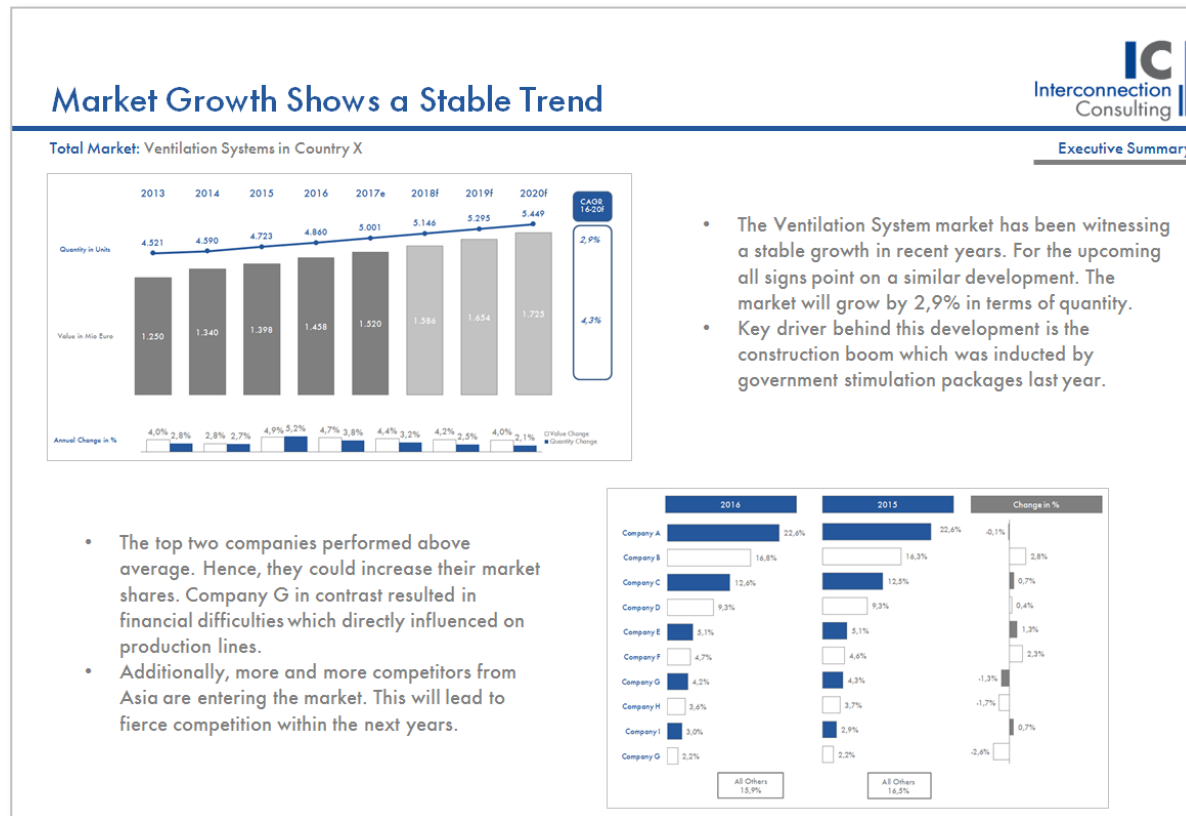


Contents of the IC Market Tracking® Loader Cranes

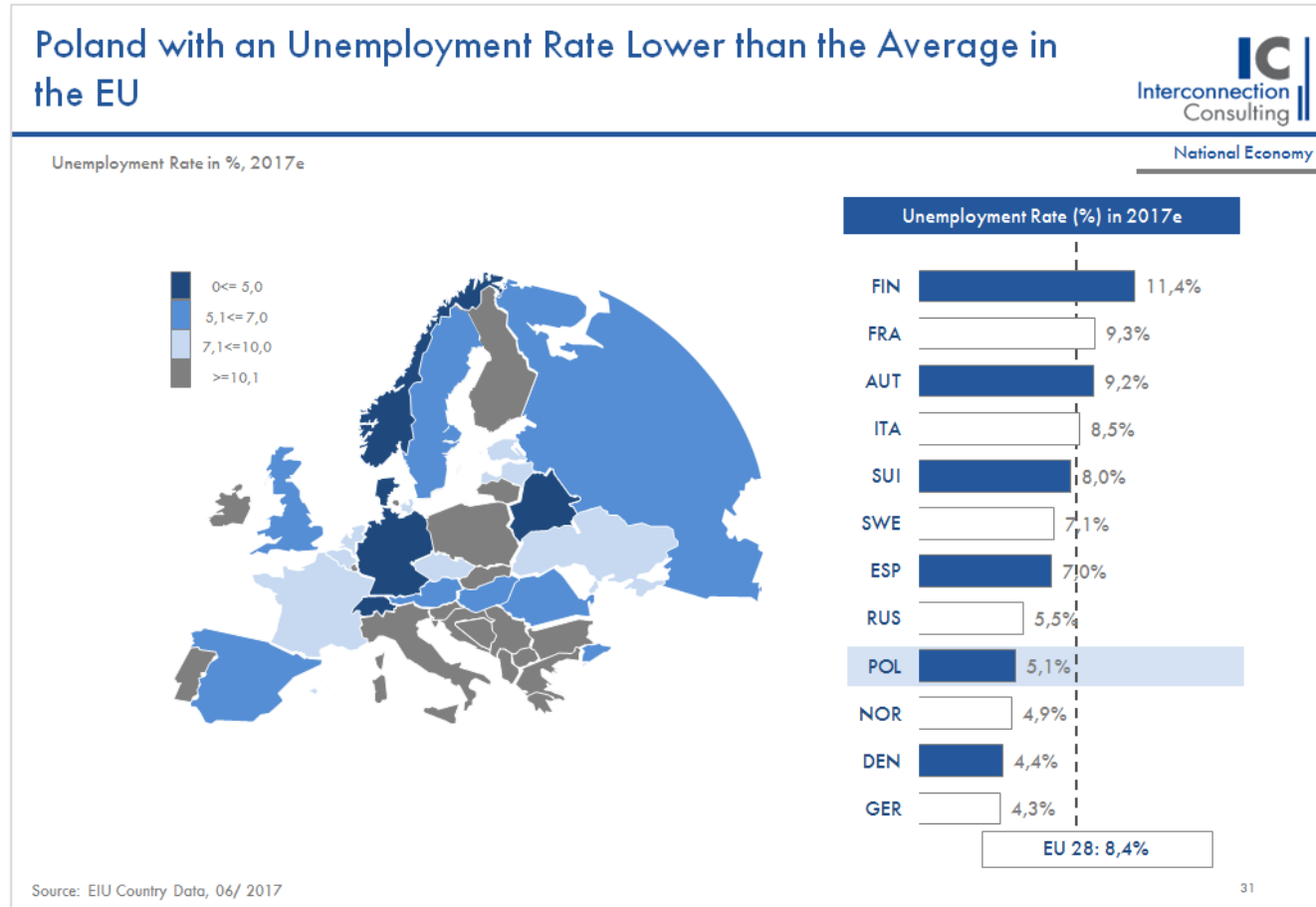
The IC Market Tracking® is modularly built and consists of the following sections:

- 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 analyzed 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.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

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

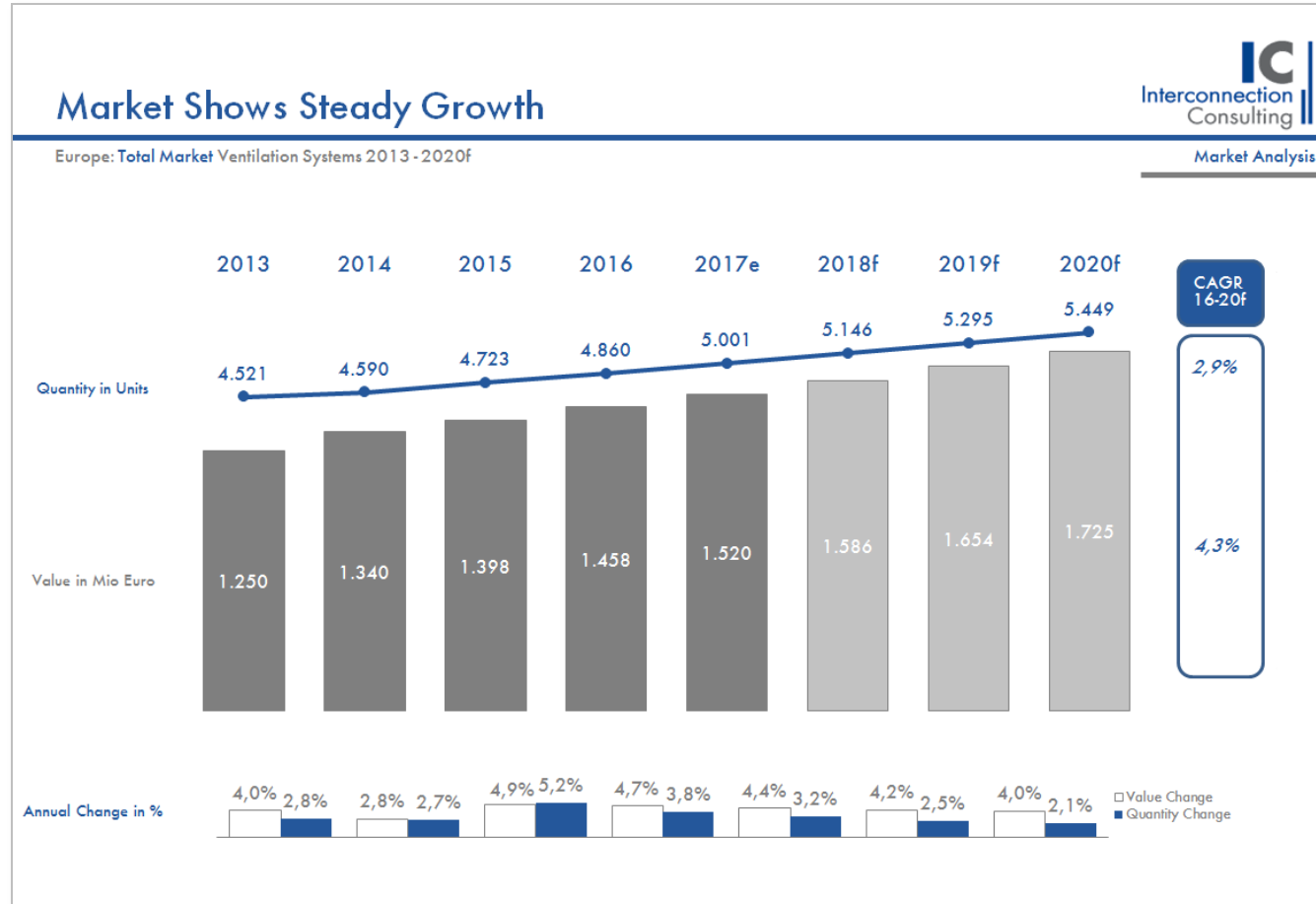


- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows sample figures.*

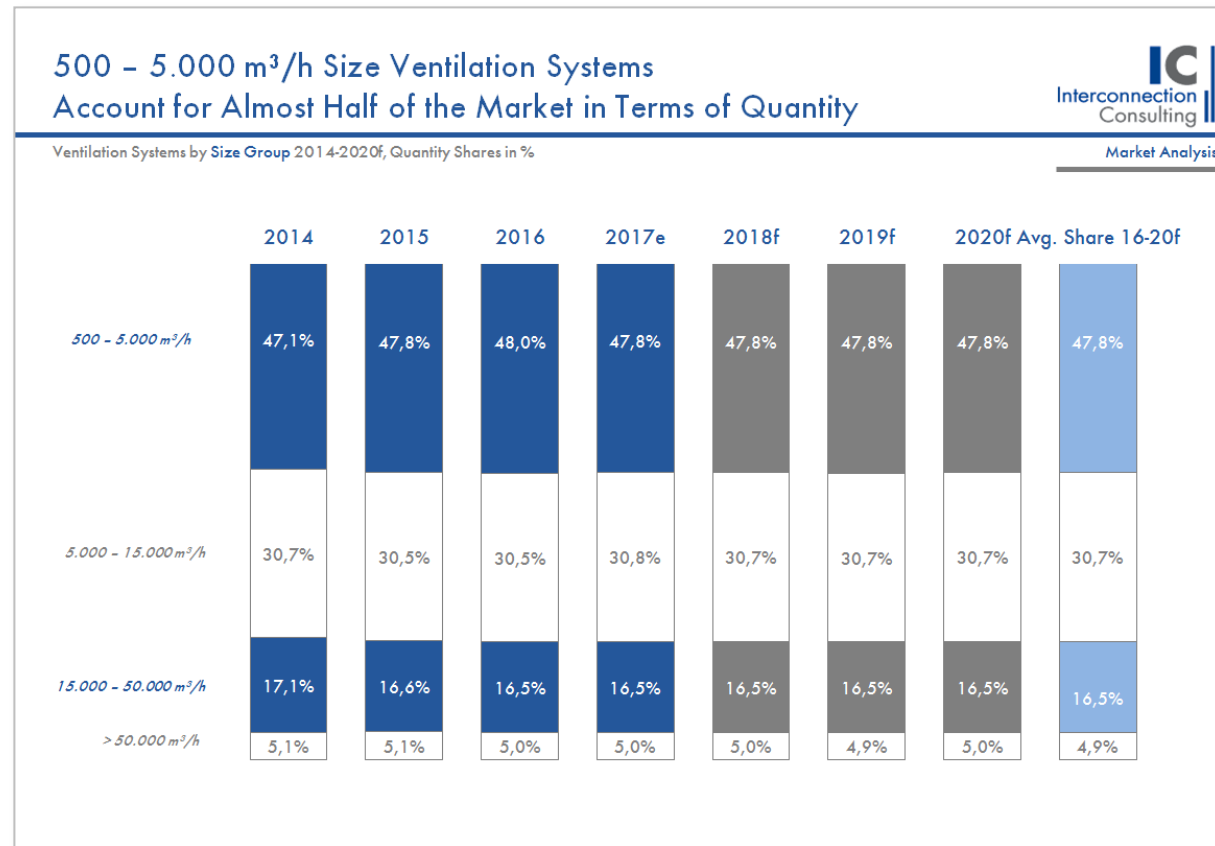


Total Market Development and Forecast

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

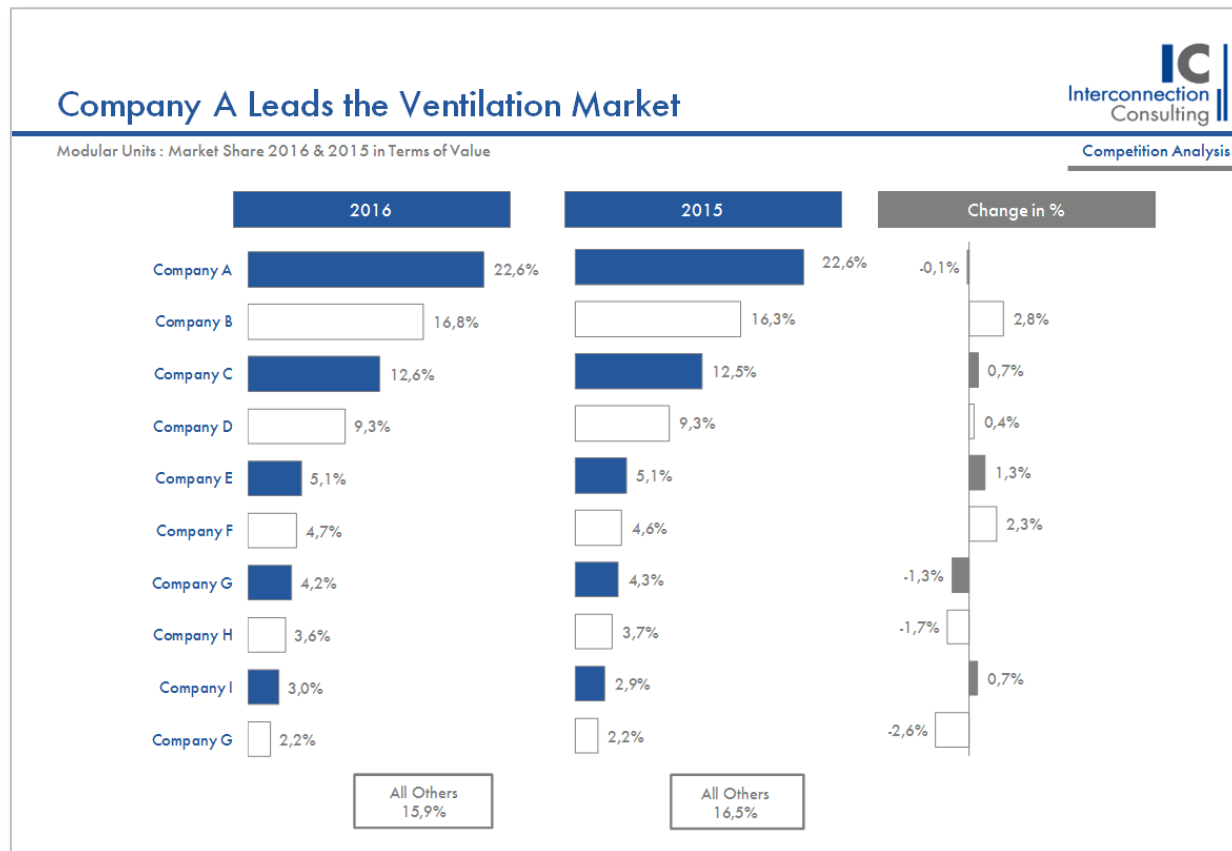


- Overview of the Product Group Segmentation, Application Field as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



Competition Analysis and Market Shares

- Market Shares of the TOP 10 companies
- This chart shows dummy figures.



- 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)
∅ 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)
∅ 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

	Single Issue	IC Subscription *	Scale of Discounts	
Single Country	€ 3.500,-		€ 7.000	-10%
All Countries **	€ 14.000,-		€ 10.000	-15%
			€ 15.000	-20%

Available Countries	Germany	UK	France	Italy	Poland
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* 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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Please choose between Subscription*
or Single issue

Subscription* **Single Issue**

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:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**
- **Annually updated reports** on fixed dates
- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)
- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the HVAC industry.
- Our studies support the leading companies in the determination of targets, definition of marketing strategies, 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 industry for ventilation systems.
- Next to market data we offer for the Industry branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also in the implementation of data in the development of marketing strategies.



Market Analysis

Market Volume
Market Shares & Entry
Competition Analysis

Distribution

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

Importance/Satisfaction Portfolios
Customer Loyalty
Customer Typology

Price Research

Price-Sales-Function
Price-Simulation-Tool
Optimal Pricing

Webverstärker

E Commerce Insights
Search Engine Marketing
Web Channel Analysis

Selected References of our Market Reports

"Long-term experience and deep understanding of different markets assure the quality of IC studies. "

Mr. Bernd Blümmers

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



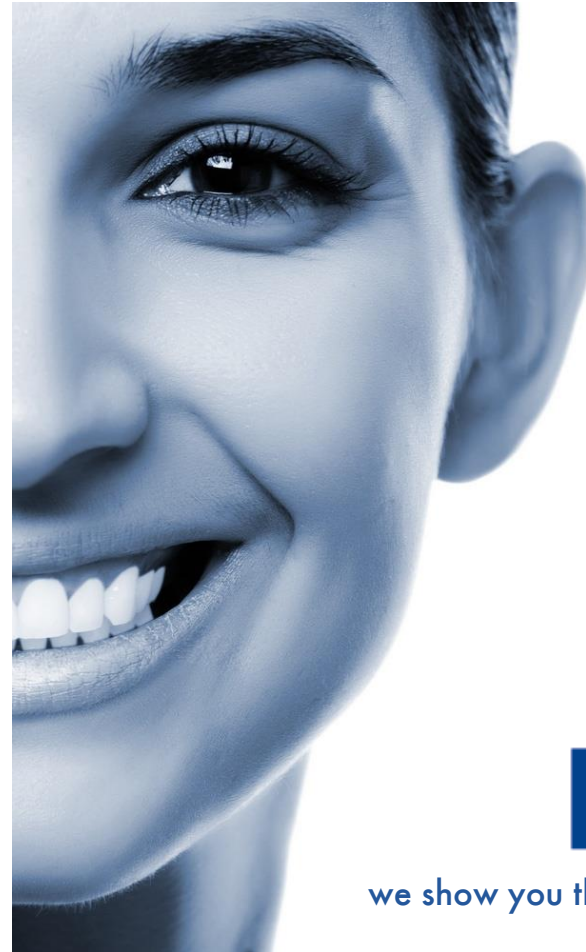
If there are any questions please
do not hesitate to contact us!

Interconnection Consulting
Getreidemarkt 1, A-1060 Wien

Andriy Gutiv – Market Analyst
Tel: +38 0 3226124 -11
Fax: +43 1 5854623 -30
gutiv@interconnectionconsulting.com

Dr. Frederik Lehner – Managing Director
Tel: +43 1 5854623 -11
Fax: +43 1 5854623 -30
lehner@interconnectionconsulting.com

Interconnection Consulting
Vienna • Bratislava • Lviv • Buenos Aires • Oberstdorf
www.interconnectionconsulting.com



IC
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Factsheet: IC Market-Tracking® Commercial and Industrial Ventilation Systems 2017

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 300
- Optional: Hard Copy

Price

- per country: € 3.500
- all regions: € 14.000
- 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.

Content 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, e, 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

Regions

Germany, Italy, France, UK, Poland.

Product Groups

Compact Air – Handling Units,
Modular Units

Size Groups

500 – 5.000 m³/h , 5.000 – 15.000 m³/h, 15.000 – 50.000 m³/h, > 50.000 m³/h

Application Fields

Office, Commercial, Industry, Others

Heat Recovery

With HR, Without HR

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.