

## IC Market Tracking®

### Office Furniture in Europe 2022



## Company Profiles



## Interactive Dashboards



## Market Drivers



automatically updated



# more than just a report – A TOOL FOR SUCCESS!

*defining growth potential since 1998*

## 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 2018 – 2021 for the total market development as well as
  - Product Groups
  - Price Segments
  - Customer Segments
  - Distribution Channels
- Forecasts from 2022 – 2025 for the total market as well as each analysed segment and subsegment

#### COMPETITION ANALYSIS

- Market shares of the top players for 2020/21
  - Market Shares on the total market in terms of value and quantity
  - Market Shares per product groups in terms of value and 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

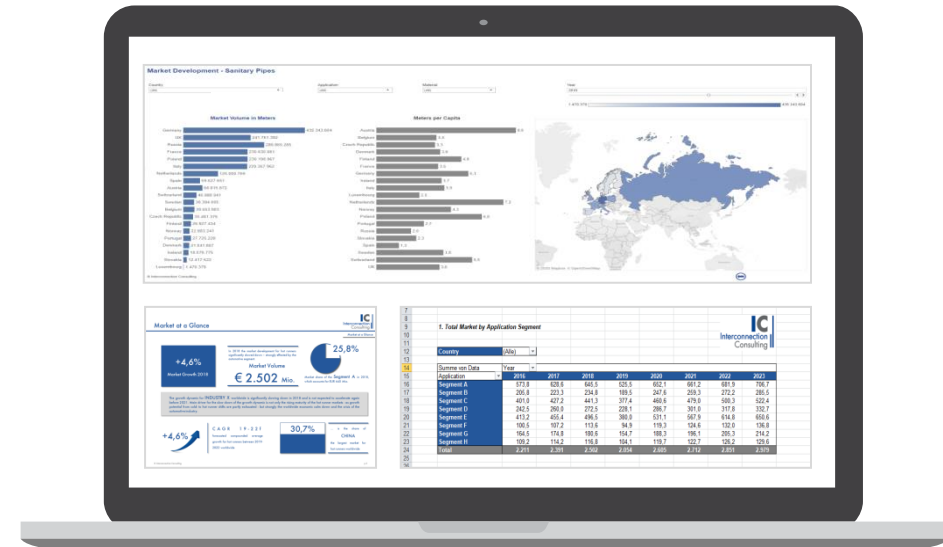
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

#### EXECUTIVE REPORTS

- Executive report 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 already integrated within Tableau

#### RAW DATA -TABLES

- Downloadable tables from MIS as xlxs. cvs. jpg. or other formats for your own integration
  - Graphs
  - Raw Data



### Market Intelligence Tool and Reports



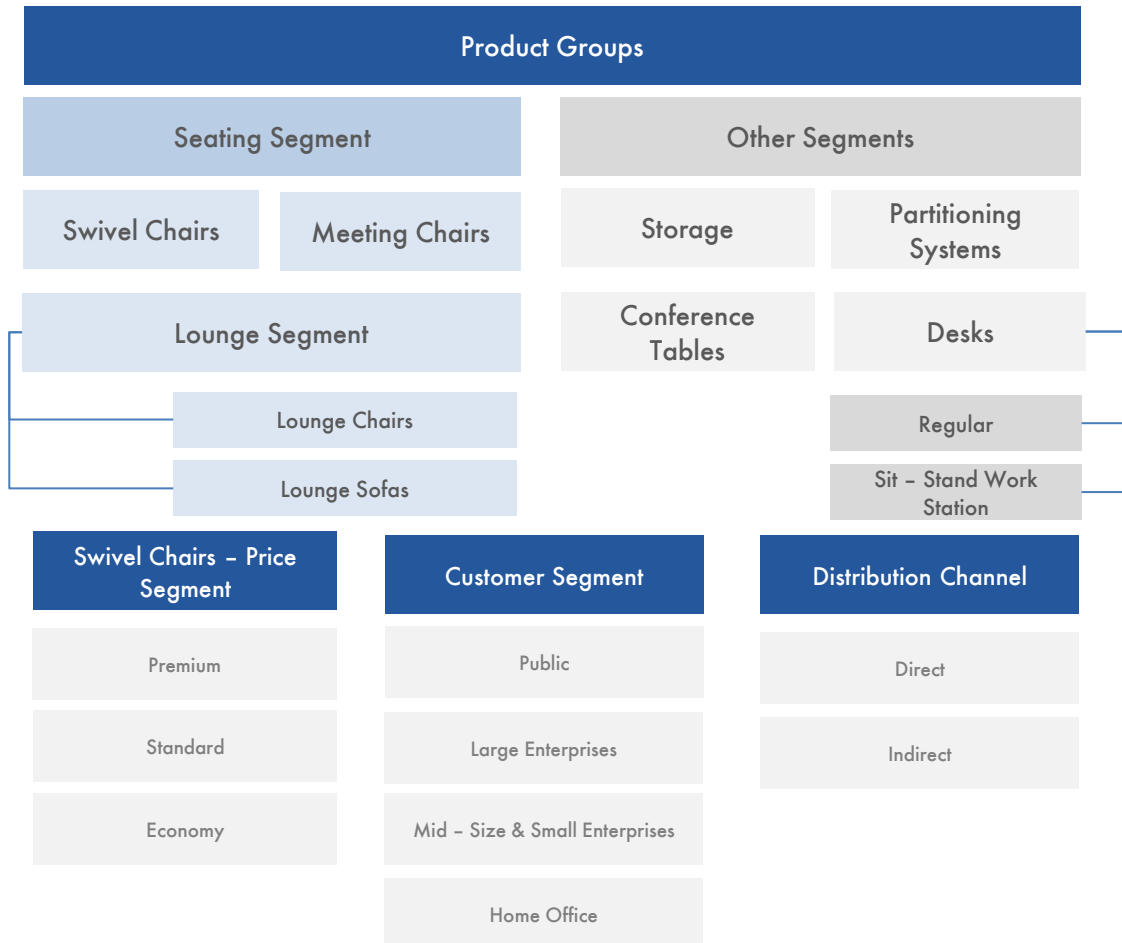
Online Dashboards

Executive Reports

Pivot Tables



## Market Report Structure



## Available Countries

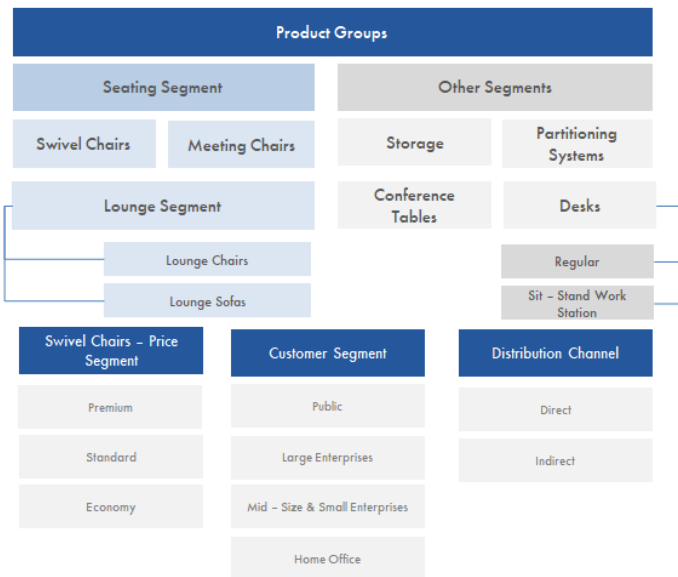


- For every market segment analysed the overall market during the previous two years and additionally make a forecast for the next 3 years.
- Turnover is stated in Mio. EURO. Turnover values are always net-turnover values (not list-prices), including rebates. Quantity in 1.000 Units means number of Furniture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



# Market Structure - Interpretation

Market Report Structure



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 netturnover 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 data are available for each country separately as well as aggregated for the package purchased.
- Each country 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

Swivel Chairs

Meeting Chairs

Folding chairs for large meetings and arm or easy chairs for conference rooms

Lounge Segment

Including reception / break room area chairs and sofas

Lounge Chairs

Lounge Sofas

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

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).



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.

500,- € +

200 - 499,- €

less than 200,- €

## 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 two years and additionally make a forecast for the next 3 years.



## Customer Segment

Public

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.

Private

Privately-owned companies broken down by sub-segments based on number of employees:

Large Enterprises

250 employees or more

Mid - Size ,Small  
Enterprises + Others

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

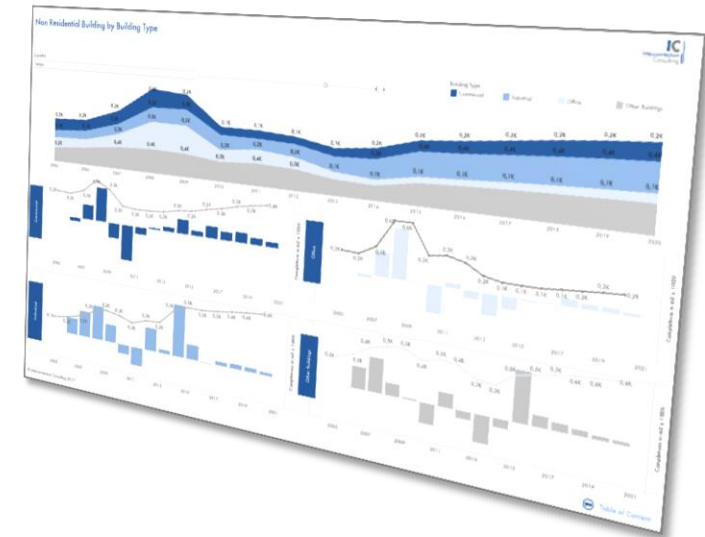
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

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





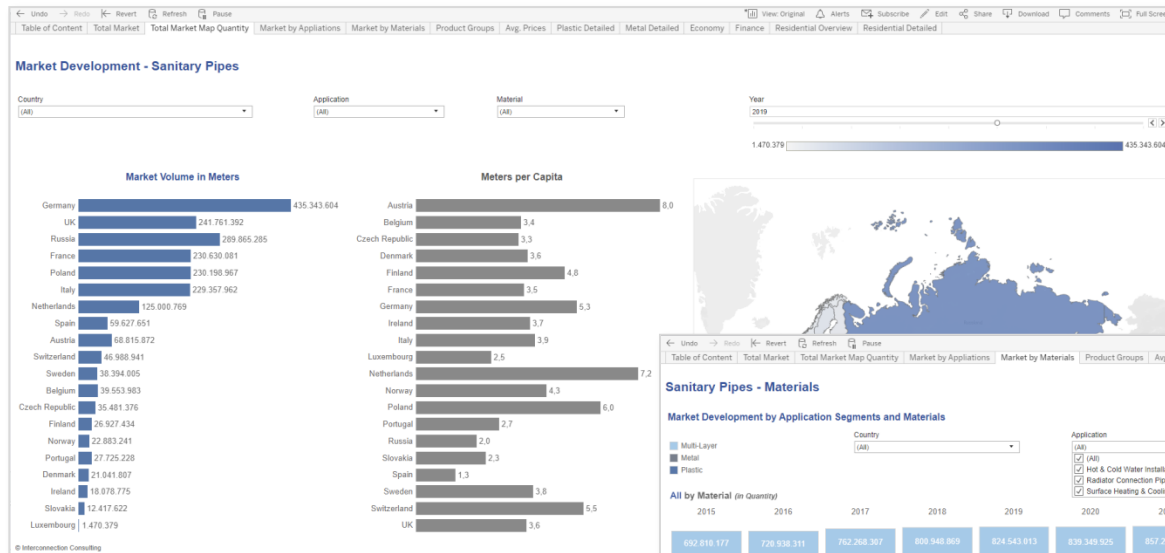
# Usability of the Market Intelligence Tool

## Let's Put it in a Video...

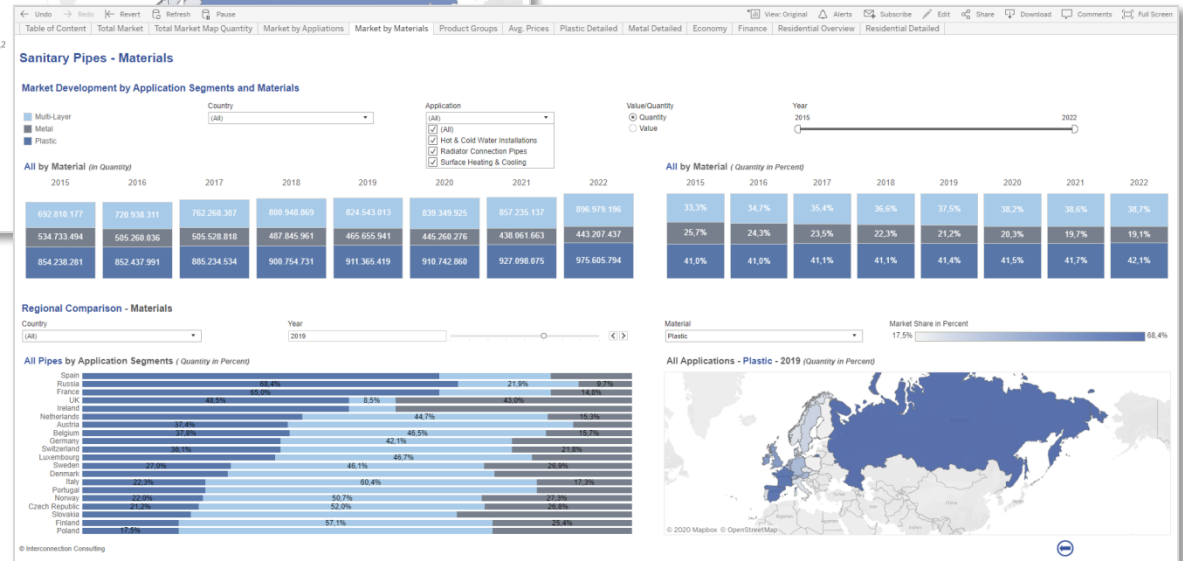




# Sample Cockpits for Market Analysis Data

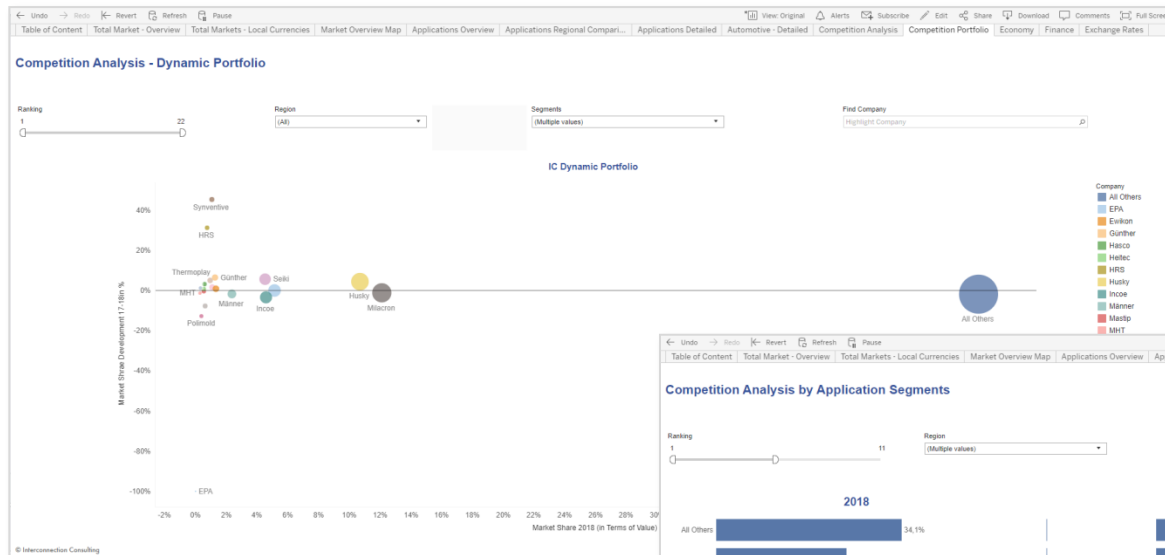


*This chart contains fictive data*

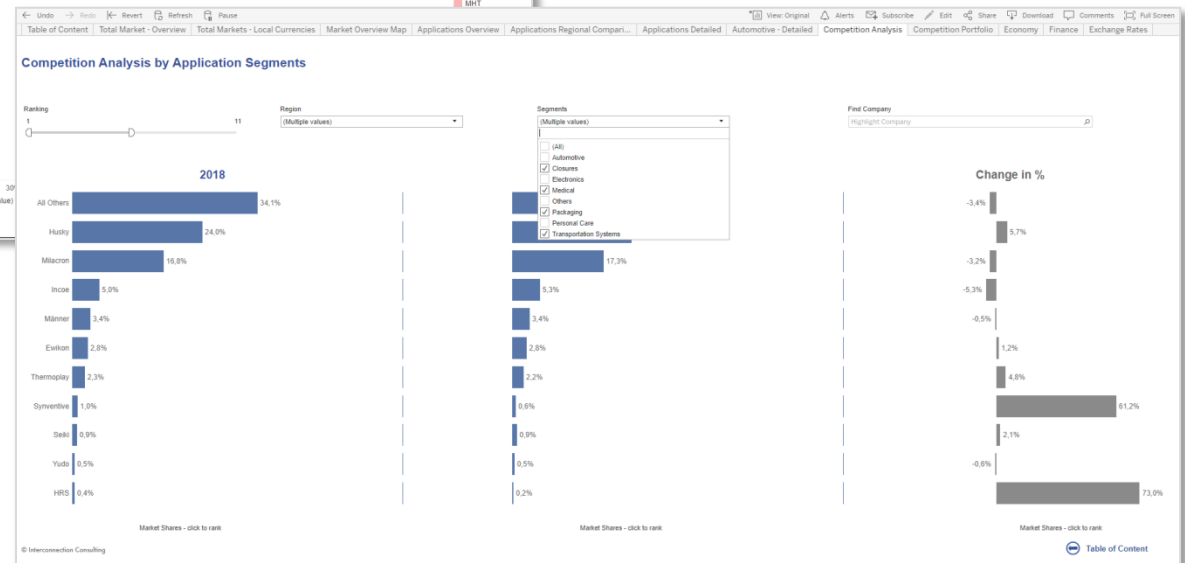




# Sample Cockpits for Competition Data



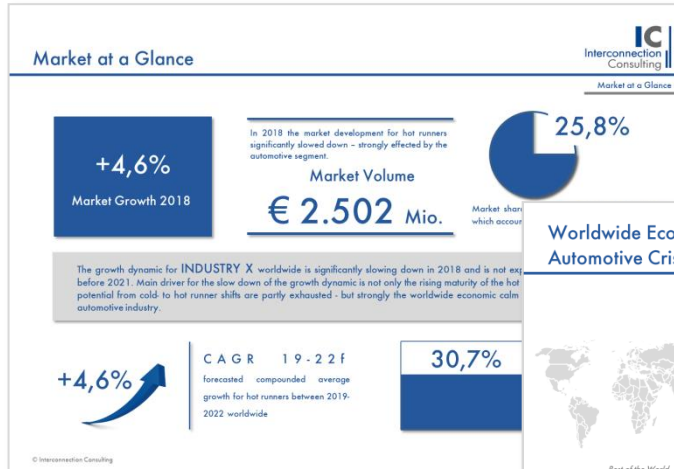
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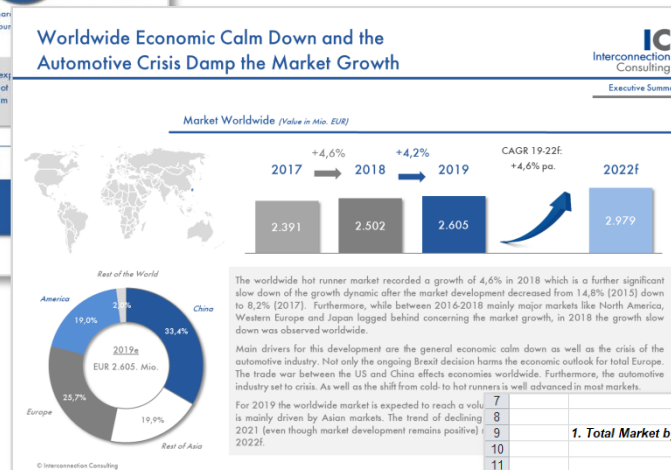


# Additional Deliverables

## Executive Summary and Pivot-Tables



Executive Summary as part of Tableau (fictive data)



Executive Summary as part of Tableau (fictive data)

**1. Total Market by Application Segment**

Country: (Alle)

Application	2016	2017	2018	2019	2020	2021	2022	2023
Segment A	573.8	628.6	645.5	525.5	652.1	661.2	681.9	706.7
Segment B	205.8	223.3	234.8	189.5	247.6	259.3	272.2	285.5
Segment C	401.0	427.2	441.3	377.4	460.6	479.0	500.3	522.4
Segment D	242.5	260.0	272.5	228.1	286.7	301.0	317.8	332.7
Segment E	413.2	455.4	496.5	380.0	531.1	567.9	614.8	650.6
Segment F	100.5	107.2	113.6	94.9	119.3	124.6	132.0	136.8
Segment G	164.5	174.8	180.6	154.7	188.3	196.1	205.3	214.2
Segment H	109.2	114.2	116.8	104.1	119.7	122.7	126.2	129.6
<b>Total</b>	<b>2.211</b>	<b>2.391</b>	<b>2.502</b>	<b>2.054</b>	<b>2.605</b>	<b>2.712</b>	<b>2.851</b>	<b>2.979</b>

Pivot-Table including all raw data as MS-Excel file (fictive data)



# Investment Plan for Your Market Research

IC Market Tracking® Office Furniture in Europe 2022

Prices & Conditions

	Subscription *
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"> <li>■ Austria</li> <li>■ Belgium</li> <li>■ Denmark</li> <li>■ France</li> <li>■ Finland</li> </ul>	<ul style="list-style-type: none"> <li>■ Germany</li> <li>■ Great Britain</li> <li>■ Italy</li> <li>■ Netherland</li> </ul>	<ul style="list-style-type: none"> <li>■ Norway</li> <li>■ Spain</li> <li>■ Sweden</li> <li>■ Switzerland</li> </ul>
	Central & Eastern Europe	<ul style="list-style-type: none"> <li>■ Baltics</li> <li>■ Bulgaria</li> <li>■ Czech Republic</li> <li>■ Hungary</li> </ul>	<ul style="list-style-type: none"> <li>■ Poland</li> <li>■ Romania</li> <li>■ Slovakia</li> <li>■ Slovenia</li> </ul>	<ul style="list-style-type: none"> <li>■ Other countries on request</li> </ul>

- **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.
- Minimum 2 countries possible to purchase.
- In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit (Software for Online Dashboards) 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,- per license per year.
- The price includes access to an online dashboard for 12 months in case of single issue or for the duration of the subscription in case of an subscription.



# 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





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

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**IC**  
we show you the way



## Yes, we would like to order the IC Market Tracking® Office Furniture in Europe 2022

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

Please choose from the available countries

### Western Europe

- |                                      |                                      |                                  |                                    |
|--------------------------------------|--------------------------------------|----------------------------------|------------------------------------|
| <input type="checkbox"/> Austria     | <input type="checkbox"/> Spain       | <input type="checkbox"/> Denmark | <input type="checkbox"/> Belgium & |
| <input type="checkbox"/> Germany     | <input type="checkbox"/> Italy       | <input type="checkbox"/> Finland | Luxembourg                         |
| <input type="checkbox"/> Switzerland | <input type="checkbox"/> UK          | <input type="checkbox"/> Norway  |                                    |
| <input type="checkbox"/> France      | <input type="checkbox"/> Netherlands | <input type="checkbox"/> Sweden  |                                    |

### Central & Eastern Europe

- |   |                                  |                                   |
|---|----------------------------------|-----------------------------------|
| <input type="checkbox"/> Baltics        | <input type="checkbox"/> Hungary | <input type="checkbox"/> Slovakia |
| <input type="checkbox"/> Bulgaria       | <input type="checkbox"/> Poland  | <input type="checkbox"/> Slovenia |
| <input type="checkbox"/> Czech Republic | <input type="checkbox"/> Romania |                                   |

- |  |              |
|--|--------------|
| <input type="checkbox"/> Single Country* .....           | EUR 1.950.-  |
| <input type="checkbox"/> 10 Countries Package* .....     | EUR 8.900.-  |
| <input type="checkbox"/> Central & Eastern Europe* ..... | EUR 7.900.-  |
| <input type="checkbox"/> Western Europe* .....           | EUR 9.900.-  |
| <input type="checkbox"/> Full Package* .....             | EUR 15.999.- |

	Single Issue	Subscription*
25% price advantage		✓
IC Cockpit – Online Dashboard Solution	✓	✓
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		✓



Billing Address: (please fill in the data completely)	Delivery Address: (necessary if different from the billing address)
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Address: _____	Address: _____
Post Code/Zip: _____	Post Code/Zip: _____
Country: _____	Country: _____
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#### \*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 31<sup>st</sup> December. The subscription can be cancelled after two purchases of the study, but not later than 31<sup>st</sup> 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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