





IC Market Tracking®

Heating Biomass Boilers in Europe 2023

www.interconnectionconsulting.com

What Do You Get - Your Benefits at a Glance Content of the Report



Benefits

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2020 2023 for the total market development as well as
 - Boiler Type
 - Heat Output
 - Business Segment
 - Distribution Channels
- Forecasts from 2024 2026 for the total market as well as each analyzed,
 Boiler Type, Heat Output, Distribution Channel and Business Segments
- Annually updates of the data

COMPETITION ANALYSIS

- Market shares of the top players for 2022/23e
- Market Shares on the total market in Value and Quantity

MARKET DRIVERS

- Analysis of the most relevant market drivers such as real GDP change, inflation, recorded unemployment, building completions and permits
- Continuous updates of the data



What Do You Get - Your Benefits at a Glance Presentation of the Data and Deliverables



Benefits

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

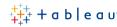
- PDF report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts

PIVOT-TABLES

- MS-Excel pivot-table including all raw data of the report
 - Market-Forecast pivot table
 - Competition pivot table



Market Intelligence Tool and Reports





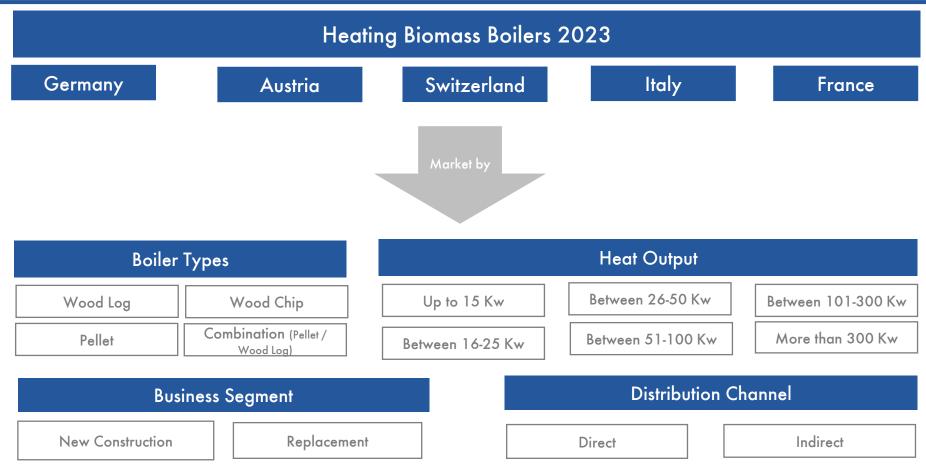
Online Dashboards

Executive Reports

Pivot Tables

IC Market Tracking® Heating Biomass Boilers 2023

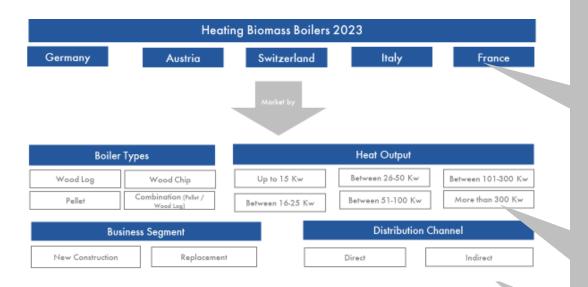




Total Market Analysis and Forecasts from 2020 – 2026f for all Segments and Competition Analysis for the Top Companies with Market Shares Overall and by Boiler Types and Heat Output for 2022/23e







 Market data which include the market development is available for each country separately as well as aggregated for the region package purchased.

Each country report includes data for four different boiler types (Pellet, Wood Chip, Wood Log and Combination) and Heat Output separately as well as aggregated for the total market of Biomass Boilers in terms of value and quantity.

 Each region report includes data for the Distribution channel and Business segment separately as well as aggregated for the total market in terms of quantity.

 Competition Analysis: Market shares of the top companies in the competition analysis are shown for the total market in value and quantity and as well by Boiler Type and by Heat Output for each of the sub-segments mentioned

Definitions I



Definitions

Boiler Type

Pellet Boiler

Wood Chip Boiler

Wood Log Boiler

Combination (Pellet / Wood Log)

The Boiler types don't include CHP Boilers or any power generating Boiler.

A boiler system that uses Pellet as fuel source.

A boiler system that uses Wood Chip as fuel source.

A boiler system that uses Wood Log as fuel source.

A boiler system that uses a combination of Pellet and Wood as fuel source.







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Definitions II



Definitions

Heating output

Up to 15 Kw

Between 16-25 Kw

Between 26-50 Kw

Between 51-100 Kw

Between 101-300 Kw

More than 300 Kw

Boilers that produce a heat output up to 15 Kw

Boilers that produce a heat output between 16 - 25 Kw

Boilers that produce a heat output between 26 - 50 Kw

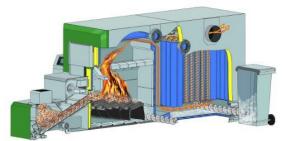
Boilers that produce a heat output between 51 - 100 Kw

Boilers that produce a heat output between 101 - 300 Kw

Boilers that produce a heat more than 300 Kw







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The Unique Mix of Methods and Approaches for Reliable Market Analysis



Methodology



The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



Basis of the analysis are surveys electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



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



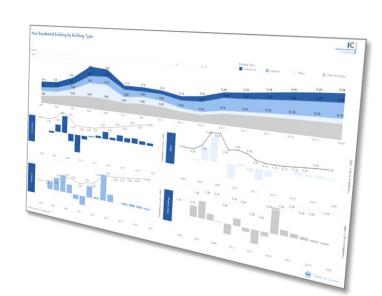
IC Cockpit

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 accesability

- 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,-.

Ease of use of the Market Intelligence Tool

Let's show a video ...



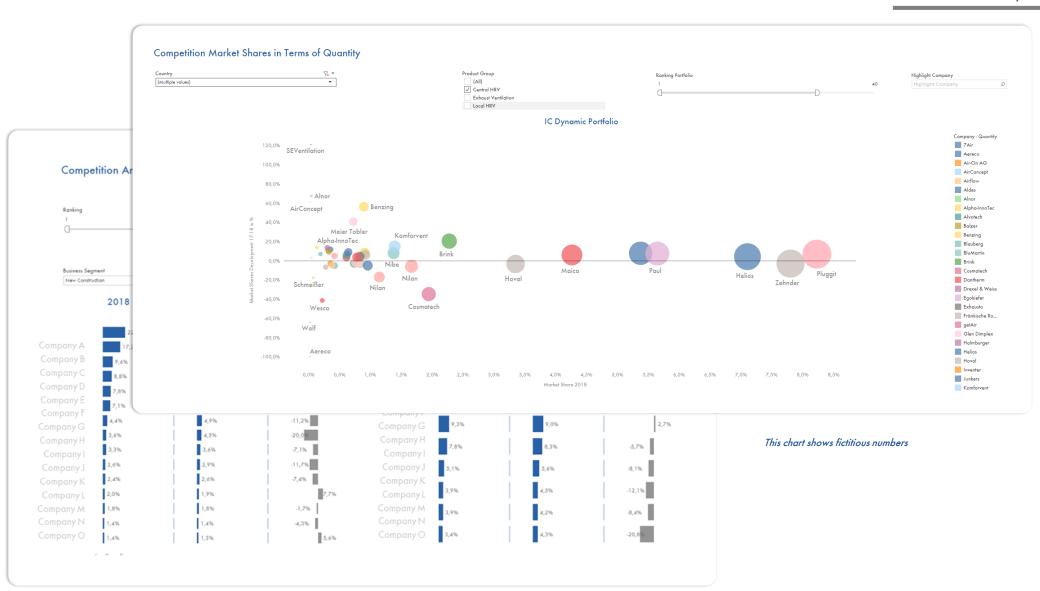
IC-Cockpit



Sample Cockpits for Market Competition Data



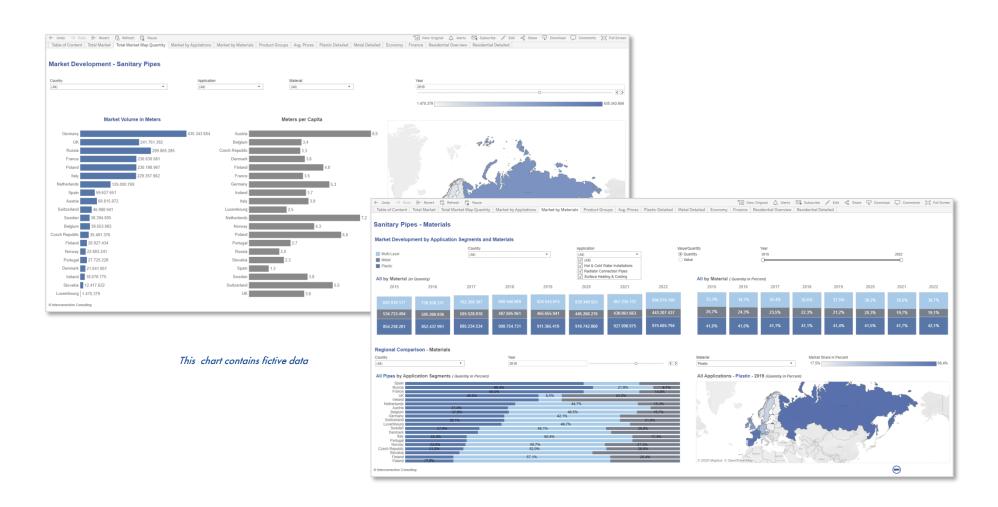
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Sample Cockpits for Market Analysis Data



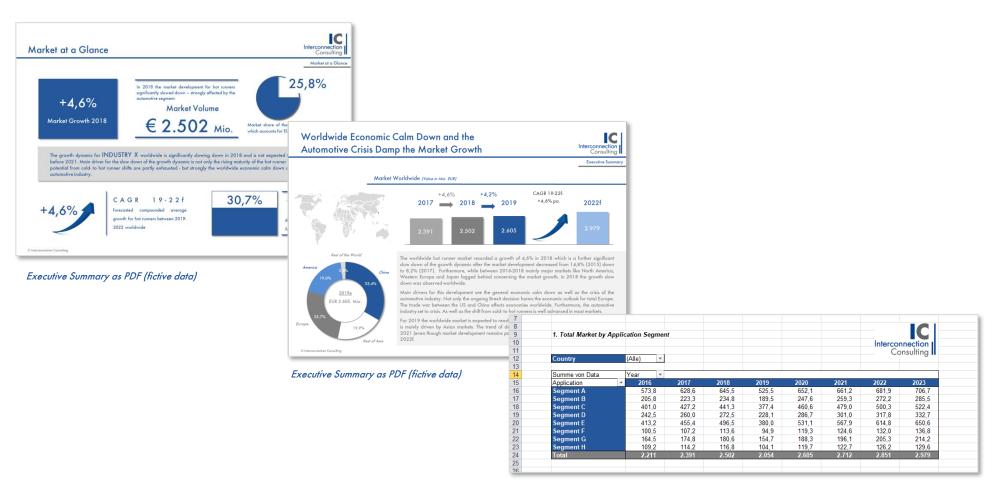
IC-Cockpit



Additional Deliverables Executive Summary and Pivot-Tables



Sample Charts



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

Content of the Report

Overview of the Included Dashboards



IC Cockpit

TOTAL MARKET

- Total Market Country Comparison
- Total Market Development by Countries

BOILER SYSTEM TYPES

Regional Market Development by Boiler System Types in Terms of Value and Quantity (in absolute figures and percent)

HEAT OUTPUT

Regional Market Development by Heat Output in Terms of Value and Quantity (in absolute figures and percent)

BUSINESS SEGMENTS

Regional Market Development by Business Segments in Terms of Quantity (in absolute figures and percent)

DISTRIBUTION CHANNEL

Regional Market Development by Distribution Segments in Terms of Quantity (in absolute figures and percent)

COMPETITION ANALYSIS

- Market shares of the top players for 2022/23e
- Market Shares on the total market in Value and Quantity

MARKET DRIVERS

- Economic Indicators (Real GDP Change, Inflation, Recorded Unemployment)
- Construction Overview by Countries

Investment Plan for Your Market Research



IC Market Tracking® Biomass Boiler 2023

Prices & Conditions

Single Country	
3 countries package	
5 countries package	





		Available Countries		
Germany	Austria	Switzerland	France	Italy
				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 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.

The license costs for Tableau Cockpit Software are included from an order value of € 5,000 (net) and with every order for an annual subscription for more than 2 countries or regions. For all other options, the price for the Tableau Cockpit is € 500 / license.



References

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

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe













































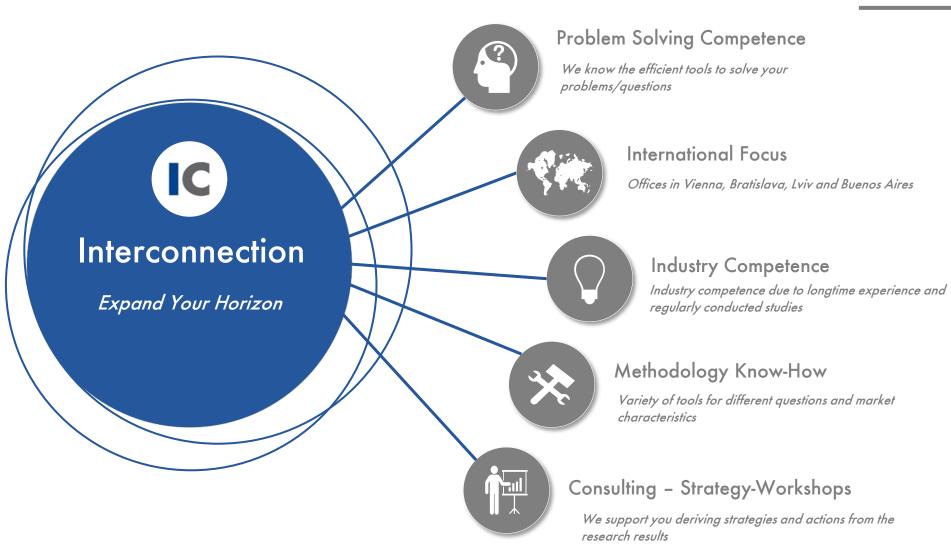




Interconnection Provides Data for Corporate Decisions



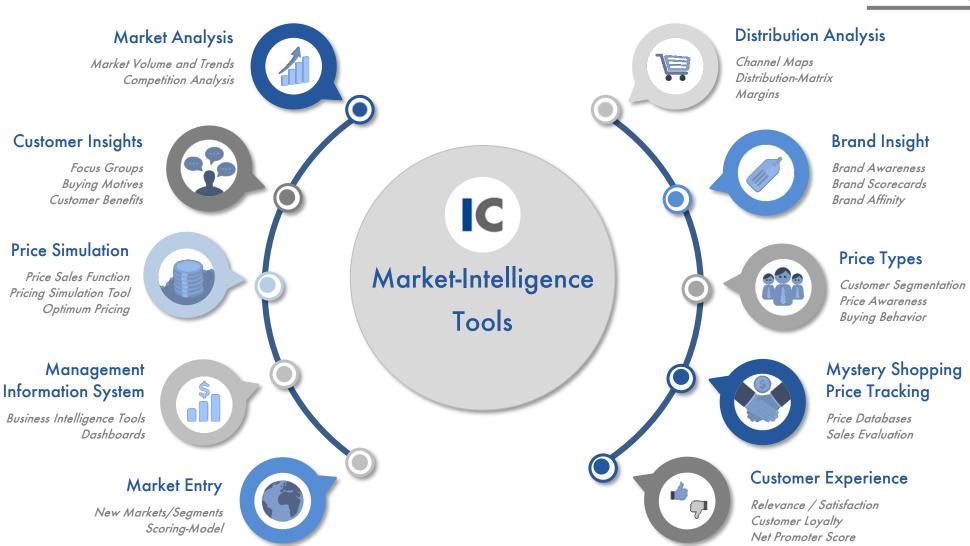
About Interconnection



Our Market-Intelligence Tools



Market Intelligence





For further questions, please do not hesitate to contact us!

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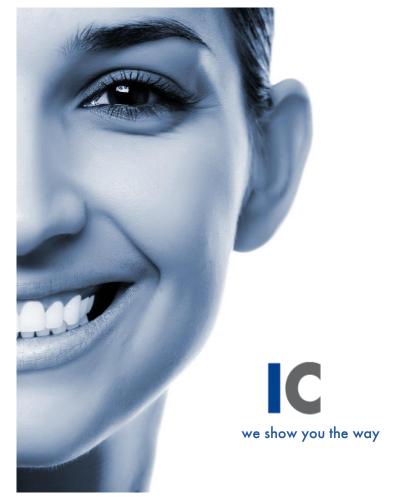
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Yes, we would like to order the IC Market Tracking® Heating Biomass Boilers 2023

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

Please, choose from the available countries and package selection

☐ Single Country*			EUR 3,999			
□ 3 Country package*			EUR 9,500			
□ 5 Country package*			EUR 15,000			
Available countries: Germany Austria Switz	erland 🗆 Italy 🗀 Fra	ince				
		Single Issue	Subscription*			
25% price advantage			✓			
IC Cockpit - Online Dashboard Solution		✓	✓			
Interactive PDF		✓	✓			
Full Flexibility – Within the sum of the subscrip country reports can be changed without any a			✓			
Web-Conference with the analyst free of charg	ge		✓			
Billing Address						
	NI					
Company:						
/AT identification number:						
Date Name		Signature				

In case of interest in single issue (+25 %), please contact the responsible analyst.

*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° 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. 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 a subscription.

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