



IC Market Tracking
Residential Ventilation
Systems Worldwide
2018

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Your Benefits at a Glance

- ✓ You will receive an overview of the **overall market** in addition to **individual market segments**.
- ✓ **Market Forecasts** for all product segments and regions for the upcoming three years, based on our econometric models by:
 - Total Market
 - Regional Markets
 - Product Groups and Segments
 - Distribution Channels
 - Building Types
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.



Residential Ventilation Systems Worldwide

Regions Available

Europe	North America	Asia-Pacific	Latin America	Middle East
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Heat Recovery – Central

Size Classes	Device Type
< 200 m ³ /h	Heat Exchanger
201 -550 m ³ /h	Heat Pump
551 – 1.000 m ³ /h	
1.001 – 15.000 m ³ /h	

Heat Recovery - Local

Installation Type	Device Type
Window	Single Unit
Wall	Transverse

Exhaust Ventilation

Central Exhaust
Local Exhaust

Product Group by...

Product Group by...

Product Group by...

Product Group by...

Business Segment

New Construction
Renovation

Distribution

2-Step
3-Step

Building Type

One Family Dwelling	Two Family Dwelling	Multi Storey Building
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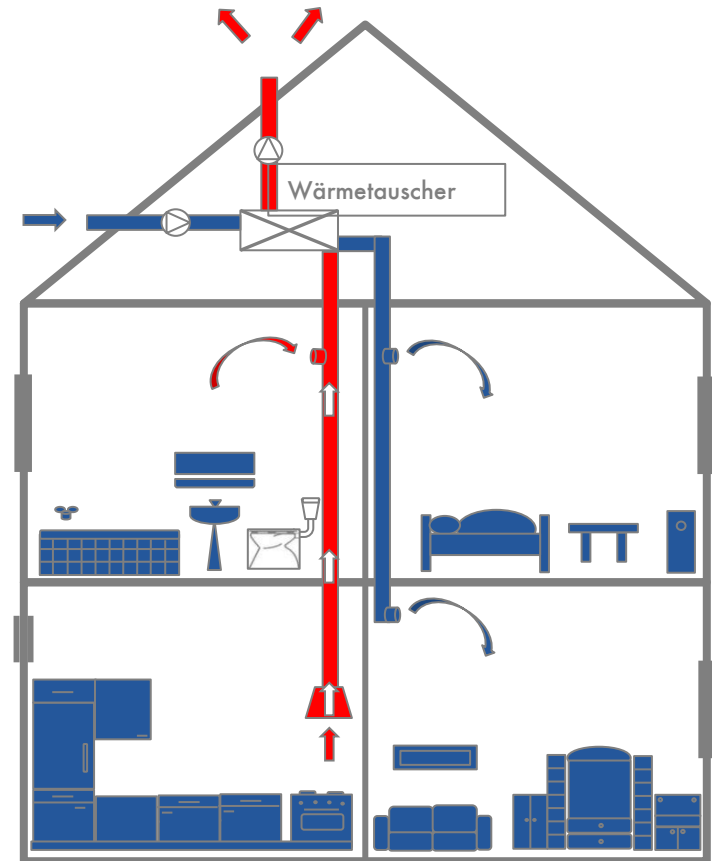
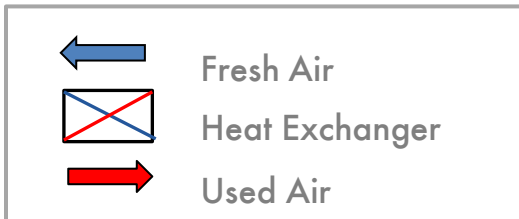
The report includes a market analysis from 2016-2018 as well as forecasts until 2021 for each segment.

Turnover

Value = Net-Turnover of Air Handling Unit only, Additional Equipment such as Pipes is not Included. No List-Prices, Discounts Included.

Operating Mode

The supply of fresh air to a residential unit occurs through a device with heat recovery; individual rooms are linked via ductwork that is connected to the device. Depending on its size, a single device can also supply several residential units through the ductwork:



Air Handling Units with Heat Recovery – Centrally Operated

Size Classes

< 200 m³/h

Small single-family houses without basements and utility rooms as well as apartment buildings (each apartment in a multi-storey apartment building has its own device)

201 -550 m³/h

Typical single-family house segment

551 - 1.000 m³/h

Two-family houses, villas and other luxury homes. Starting at this size, smaller quantities are used even in the commercial sector (e.g. offices, schools, etc...).

1.001 - 15.000 m³/h

All apartments are ventilated through a central device in multi-storey apartment buildings. Commercial ventilation is more important in this segment.

A competition analysis for individual size classes is not included.

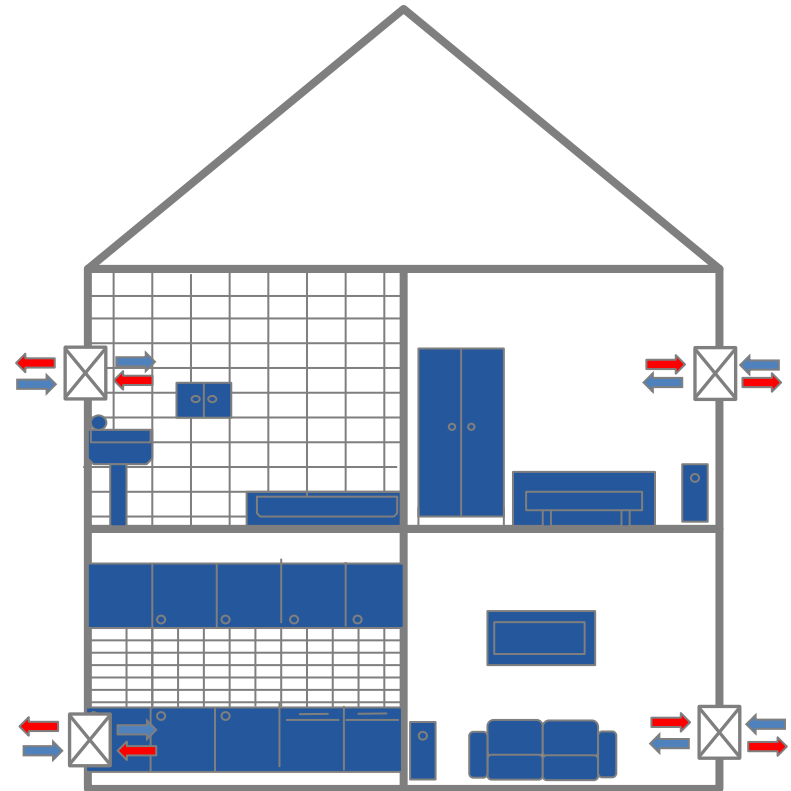
Air Handling Units with Heat Recovery – Locally Operated

Turnover

Value to Net-Turnovers (No List-Prices), Discounts Included.

Operating Mode

The supply of fresh air to a residential unit occurs through multiple devices that are located in individual rooms.



Air Handling Units with Heat Recovery – Locally Operated

Product Groups

Device Type

Transverse

Two ventilators are working in parallel operation. While one fan pulls in fresh air, filters it, and releases the clean air into the room, the second fan exhausts the used air.

Single Unit

A single unit is responsible for releasing fresh air into the room as well as exhausting the used air.

Installation Type

Wall Mounted

The ventilation units are being mounted to a wall.

Window Mounted

The ventilation unit is being mounted below the window. Usually window and ventilation unit are being installed/replaced together which is why both can be considered as one.

Exhaust Ventilation without Heat Recovery

Turnover

Value to Net-Turnovers (No List-Prices), Discounts Included.

Operating Mode

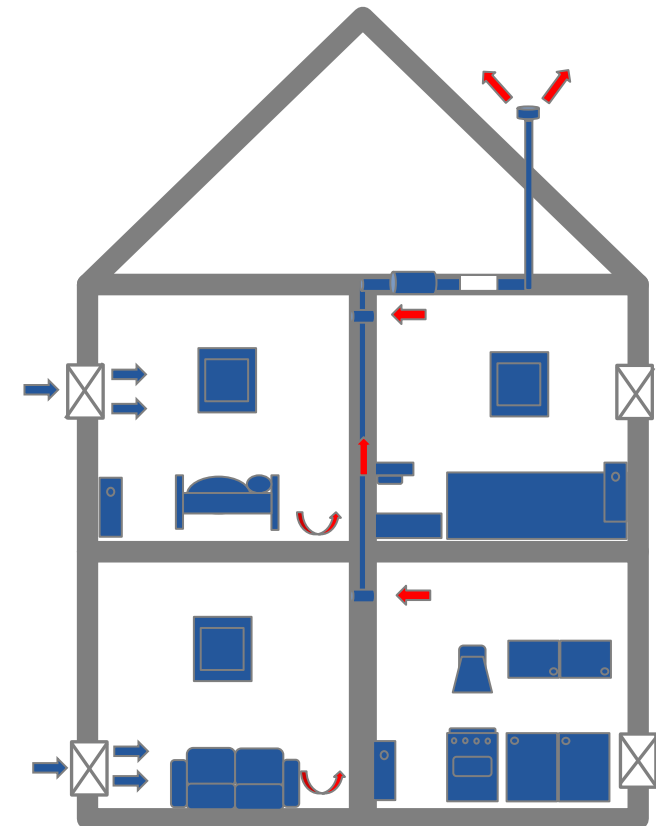
Local Exhaust

In typical wet rooms such as kitchen or bath room ducted fans are installed. These ducted fans suck the air into a pipe system and push it out of the building.

Central Exhaust

Under or on top of the roof of the building is a central ventilator. This ventilator is connected to individual living units via pipe system.

In multi-storey buildings the ventilator covers several living units, usually between 7-30 living units. In rare cases, a big roof ventilator is covering several 100 living units

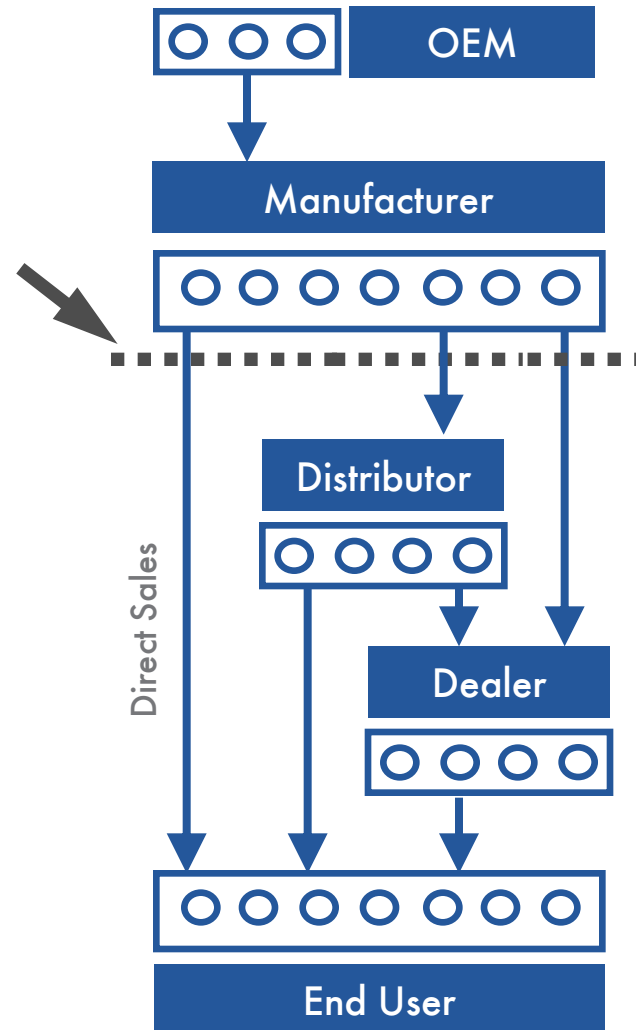


Regions	
Europe	DACH Region, France, Benelux, Italy, Scandinavia, Poland
APAC	India, China, Japan, South Korea
Latin America	Brazil, Mexico, Argentina
Middle East	UAE, Saudi Arabia, Qatar, Kuwait, Oman, Bahrein
North America	USA and Canada

What Do We Measure in Our Reports?

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.



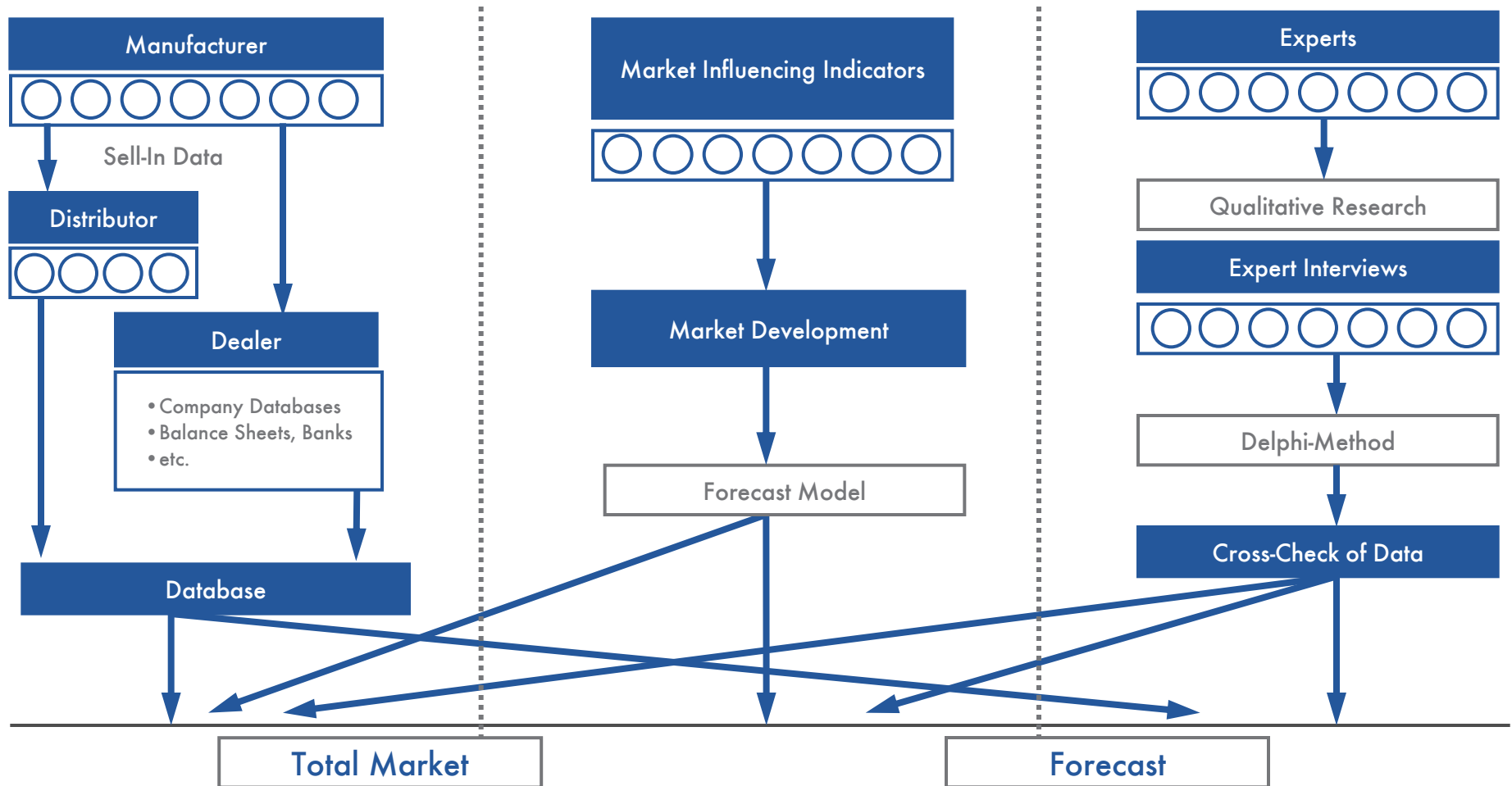
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

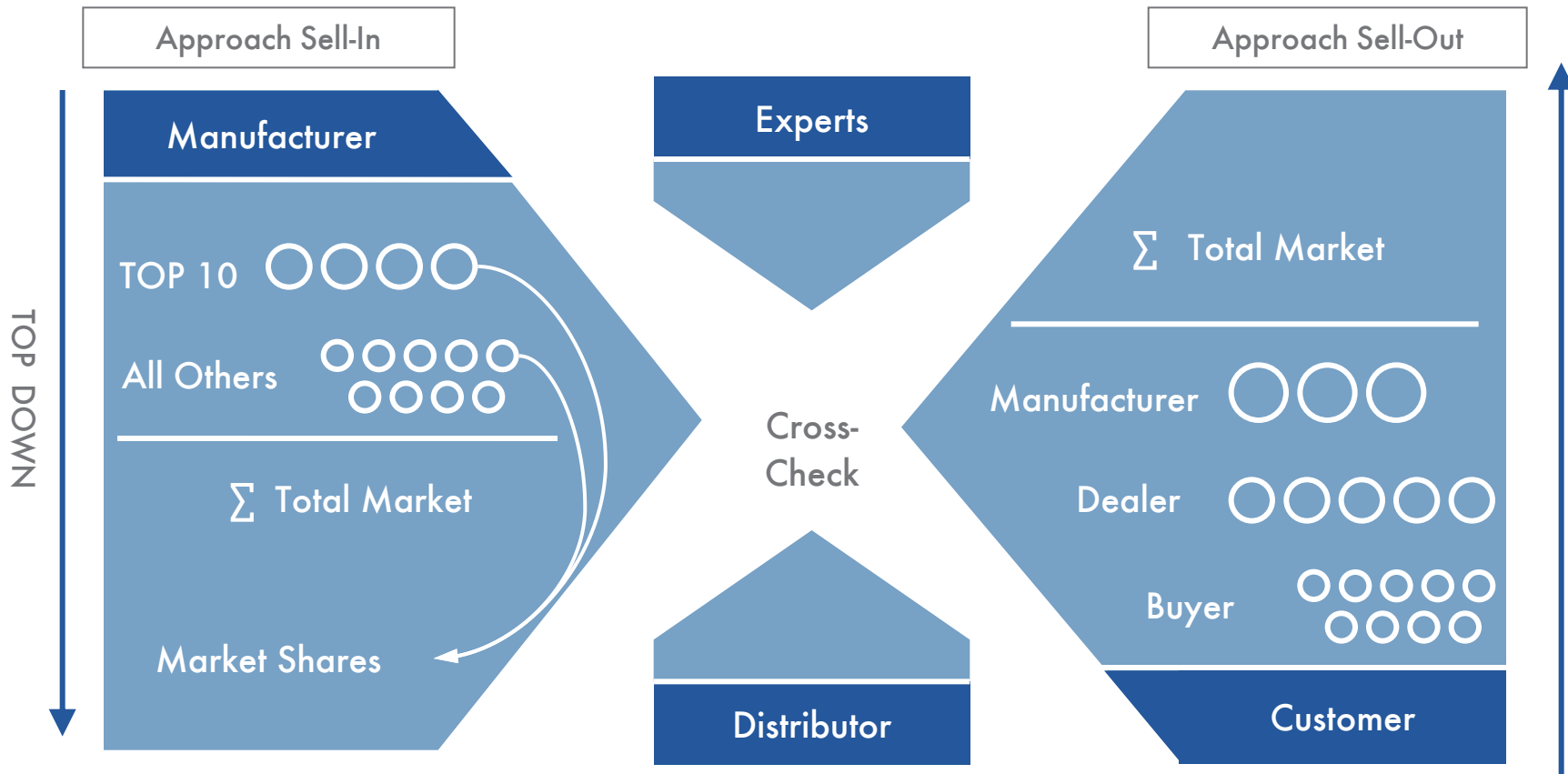
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology

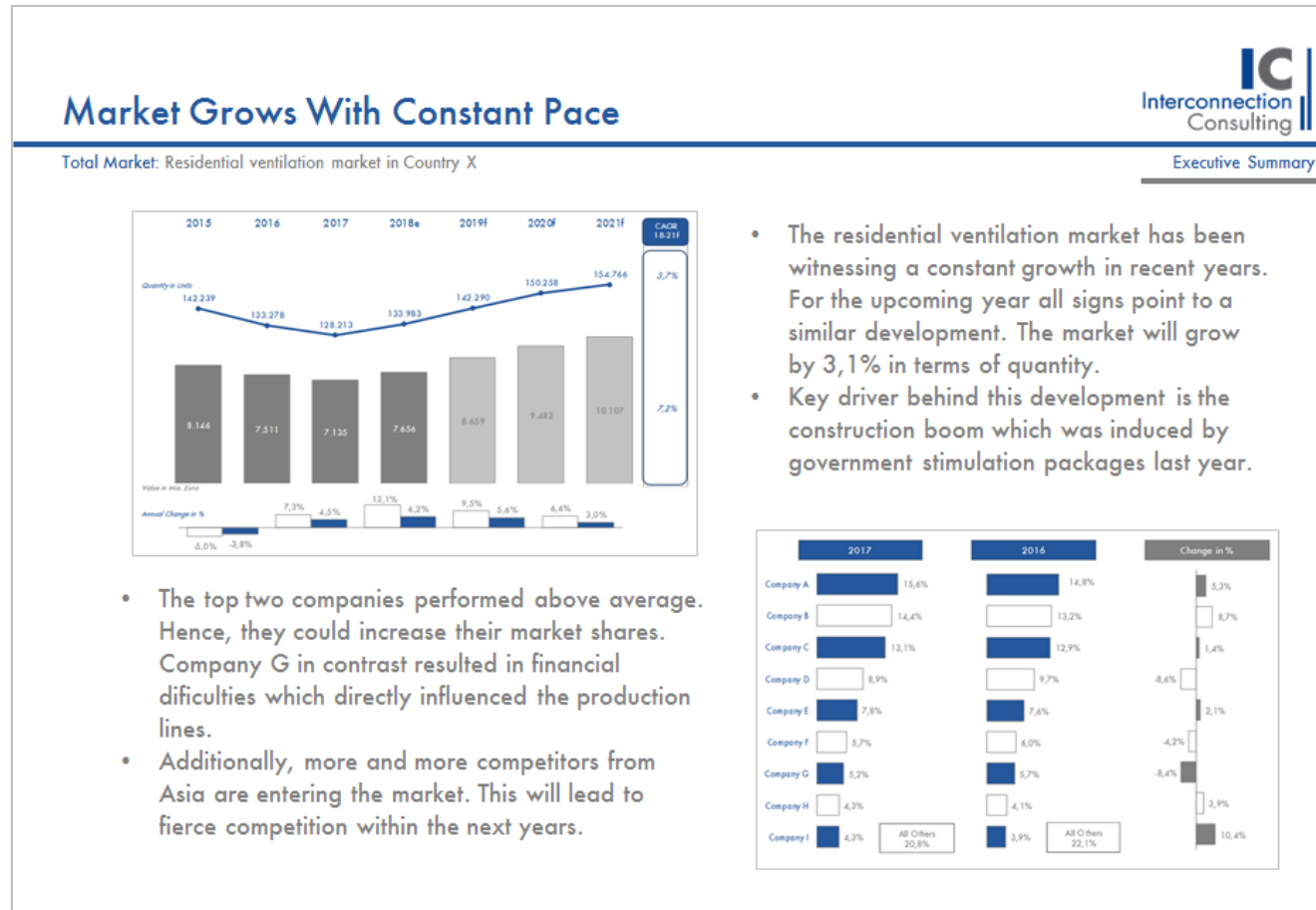


How Do we Cross Check the Data?



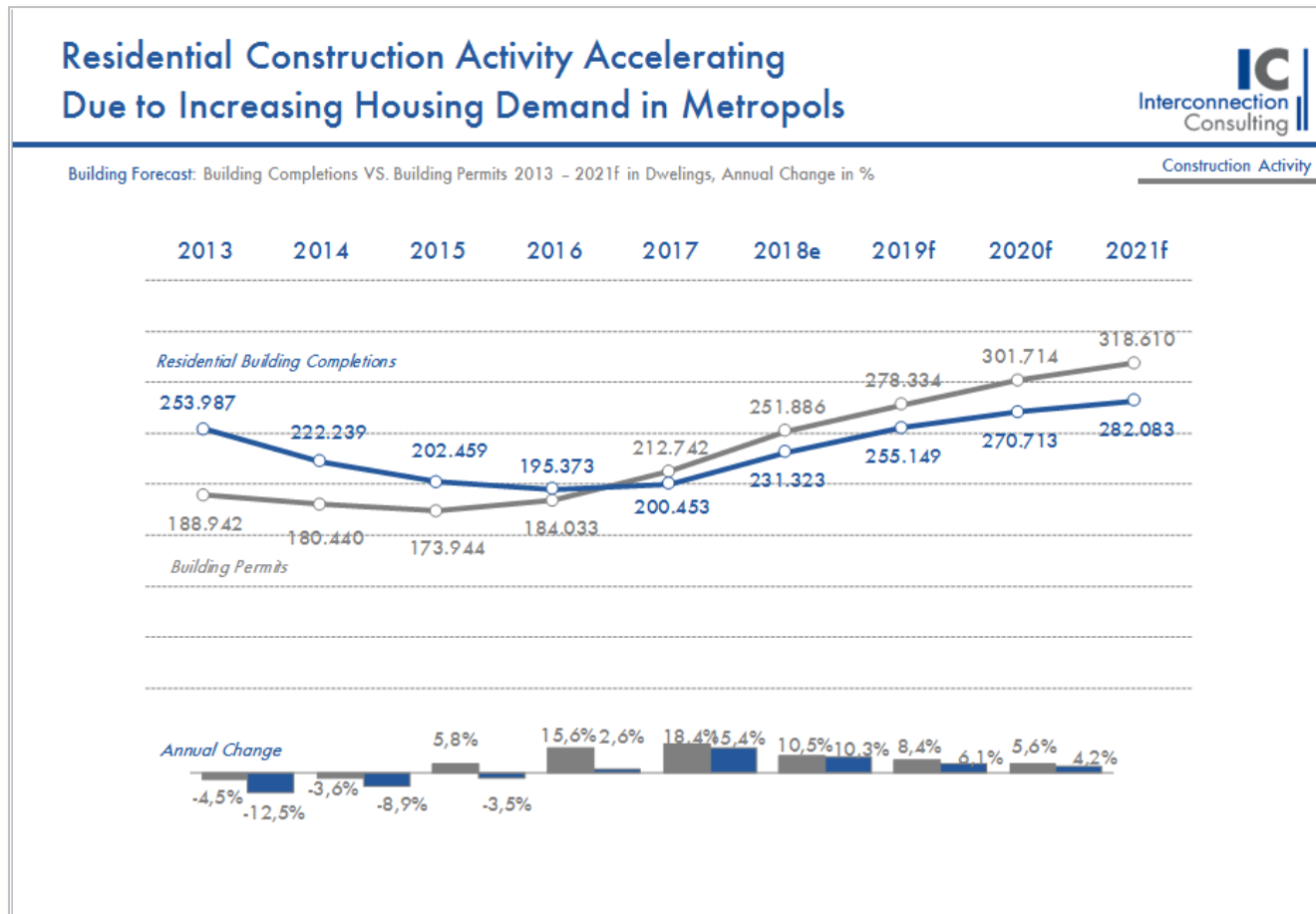
Executive Summary at the Beginning of the Report

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



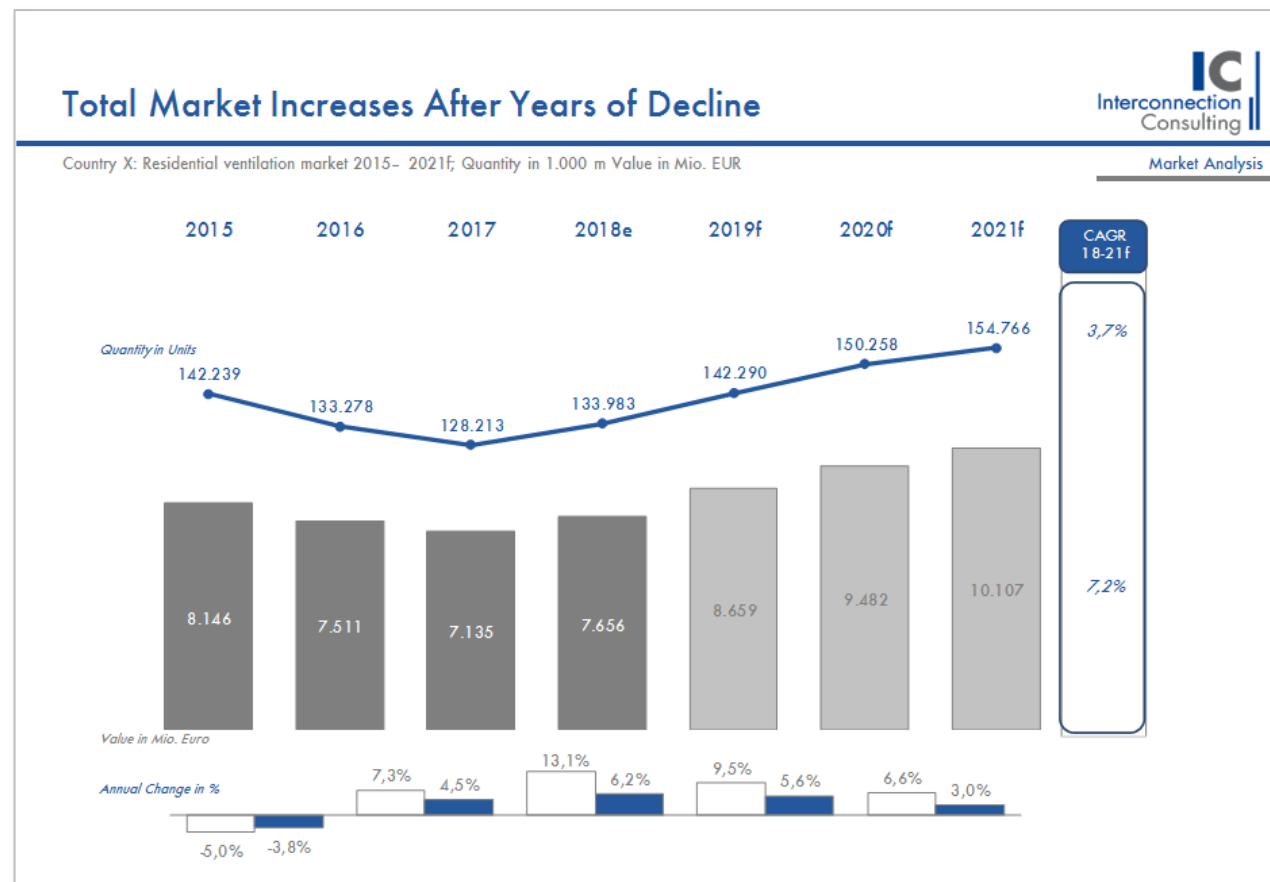
Market Environment Data of Our Forecasting Model

- 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.*

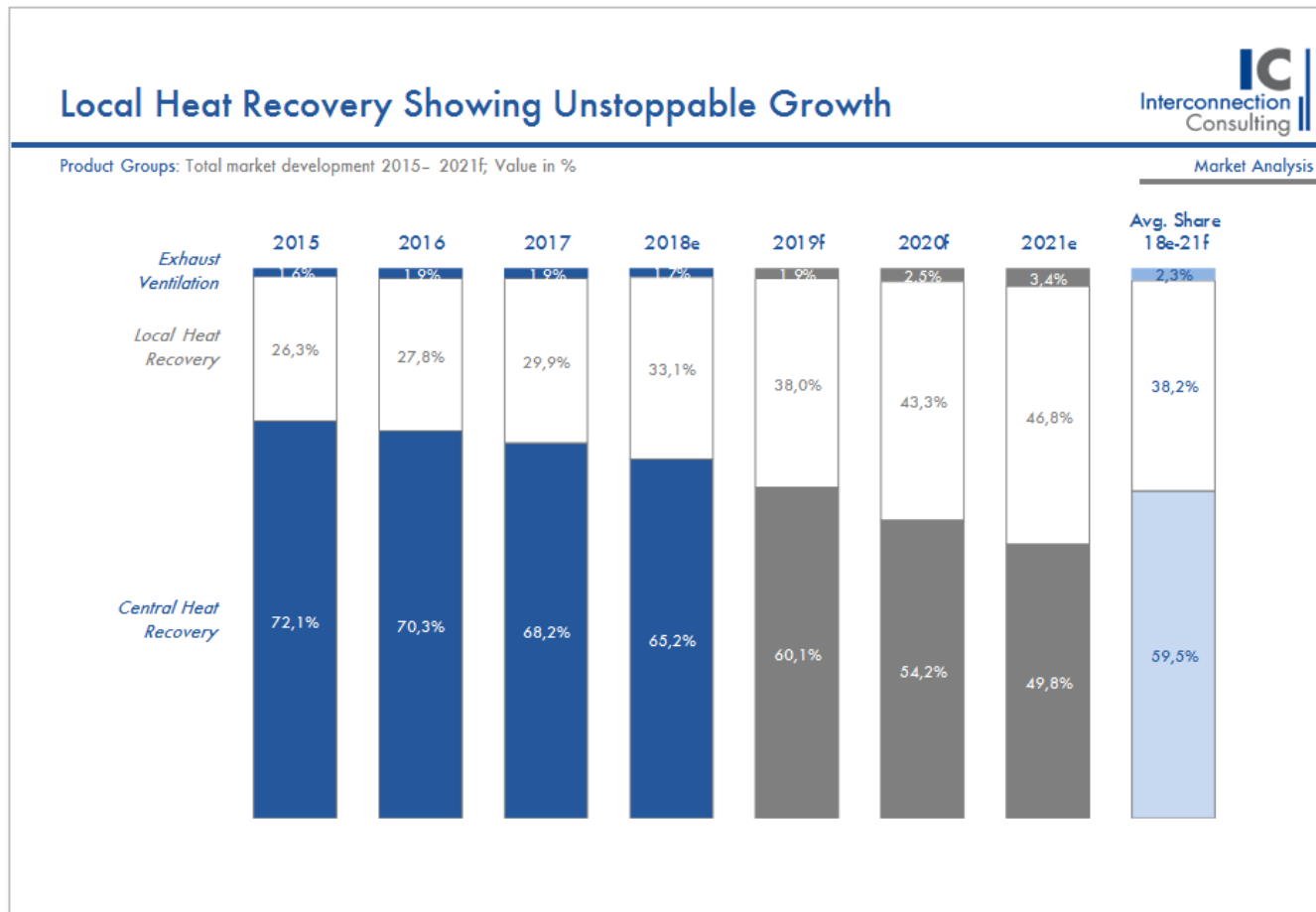


Total Market Development and Forecast

- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



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



- In addition to the visualized report a Pivot Table will be included.
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

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

Investment Plan for Your Market Research

	Single Issue	IC Subscription*
Single Region/Country	€ 2.950,-	+25% for Single Issues
Europe Top 6	€ 9.950,-	
World Wide Report	€ 11.950,-	

Available Regions				
North America	Latin America	Europe	Asia-Pacific	Rest of the World
USA & CAN	BRA, ARG & MEX	GER, FRA, UK, ITA, RUS	CHN, IND & JPN	Detailed Country Reports available

**** 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.

Reports are available either as detailed country reports or as cumulated region reports.
 Europe Top 6 report offers detailed data on 6 biggest European markets.
 Europe report offers data on total European market.

Price includes an interactive PDF Document. All prices shown exclude sales tax.

„The IC Market Tracking® Residential Ventilation Systems was very helpful to understand the German residential ventilation market. It offers a deep insight into product group segmentation and comes very handy in usage.“

Ulf Hörman
Business Development Director, Swegon SE

Customers of our Report on Residential Ventilation Systems



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

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