



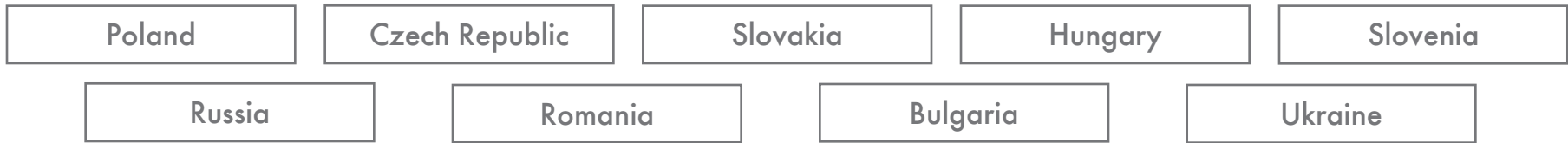
IC Market Tracking
Office Furniture in Central
& Eastern Europe 2018

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
 - Regional Markets
 - Product Groups and Segments
 - Distribution Channels
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.



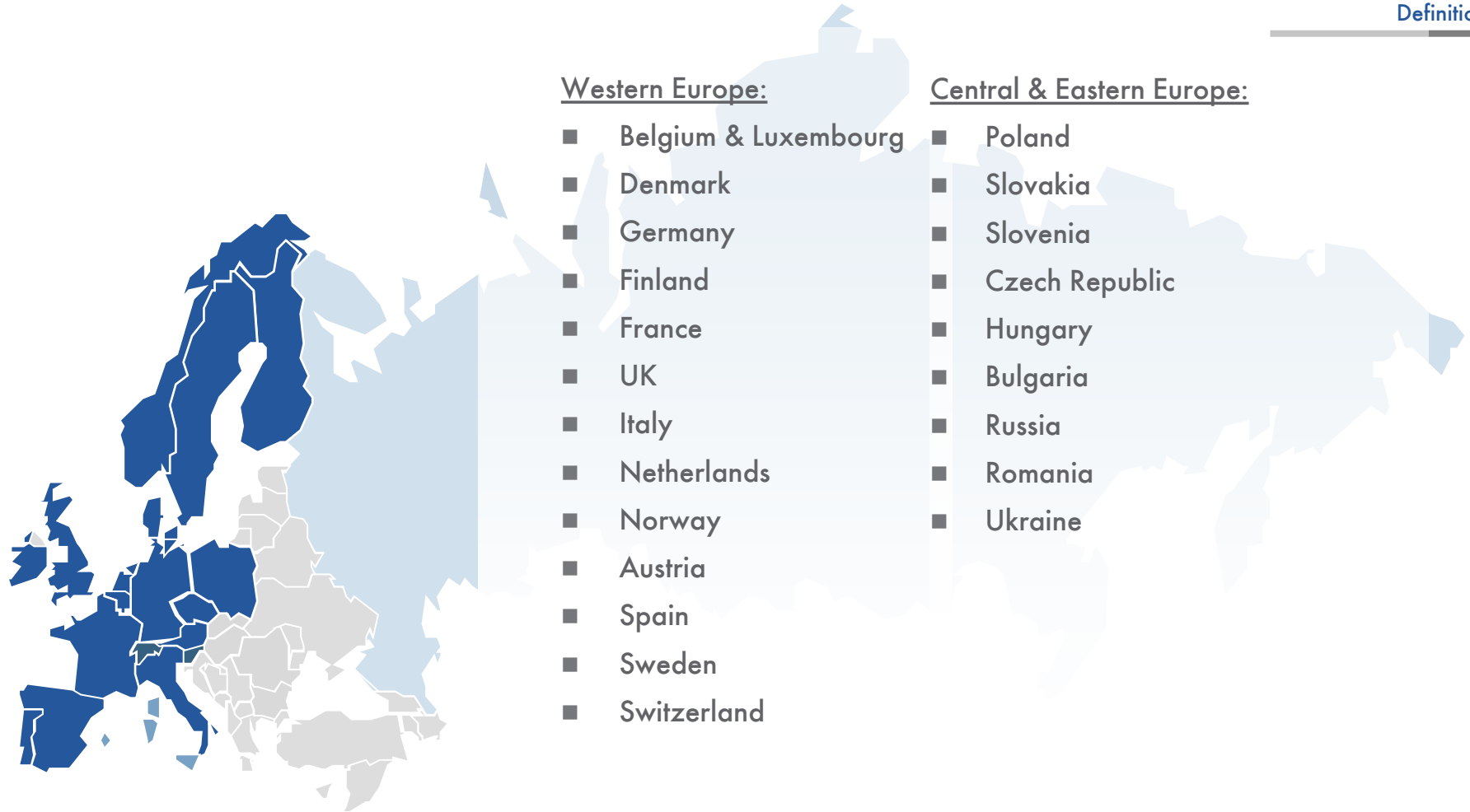
IC Market-Tracking® Office Furniture in CEE 2018



Product Groups		Distribution Channel	Segment
Storage	Swivel Chairs	Direct	Executive Office
Desks	Meeting Chairs	Indirect	Operational Office
Conf. Tables	Lounge Chairs		
Part. Systems			

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.

We Offer the Following Countries



Product Groups

Storage

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.

Cupboards, filing cabinets, mobile and fixed pedestals, containers, partitions and bookcases - neither hanging files nor other office material.

Desks

Excluding pedestals and all types of screens (e.g. desk-up and system).

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

Swivel Chairs

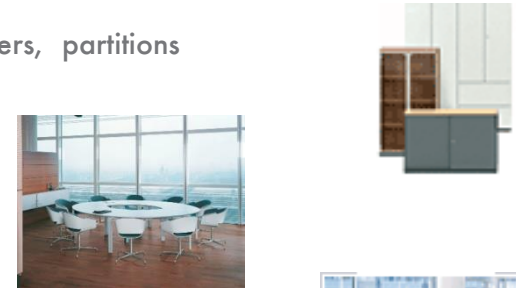
Swivel Chairs

Meeting Chairs

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

Lounge Chairs

Reception and break room area chairs



Not included: Home Office Furniture not sold by Office Furniture Manufacturers (e.g. IKEA furniture, etc.), Kitchen Furniture, School Furniture, Manufacturers of Partitioning Systems only (they are covered by a separate survey).

Distribution

Direct

Sales direct to the end user, also by own sales rep.; Others: Internet, etc.)

Indirect

Through Specialized dealers, wholesalers or other retailers

Business Segment

Executive Office

Chief Executive Offices, premium price

Operational Office

Average working place

Abbreviations

CAGR

Compound Annual Growth Rate over the period 2015 - 2019f

Avg. Share

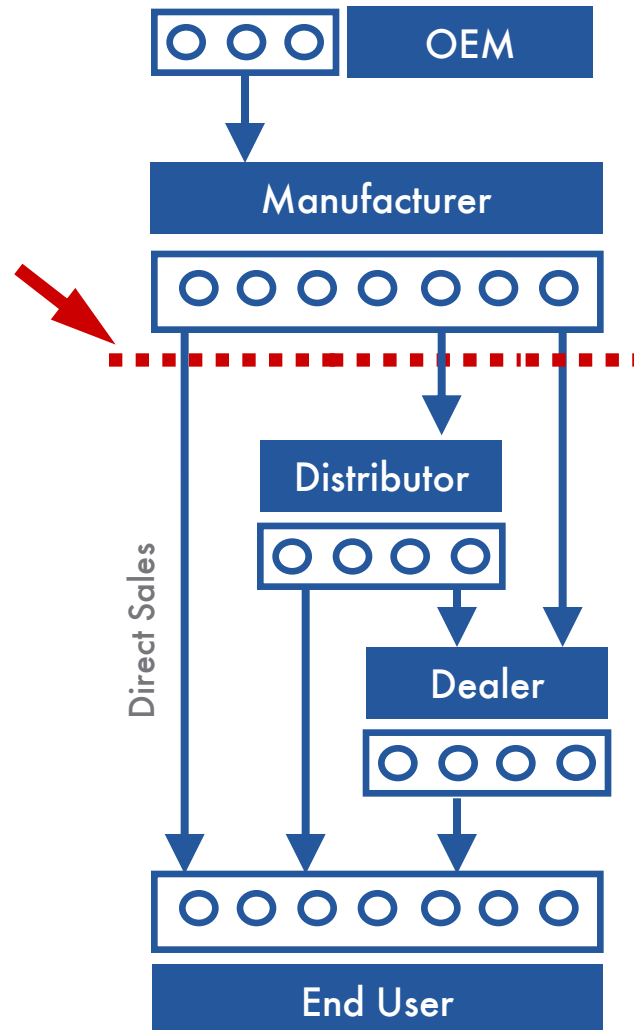
Average Share over the period 2015 - 2019f

2016e/2019f

Estimated/Forecasted

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.



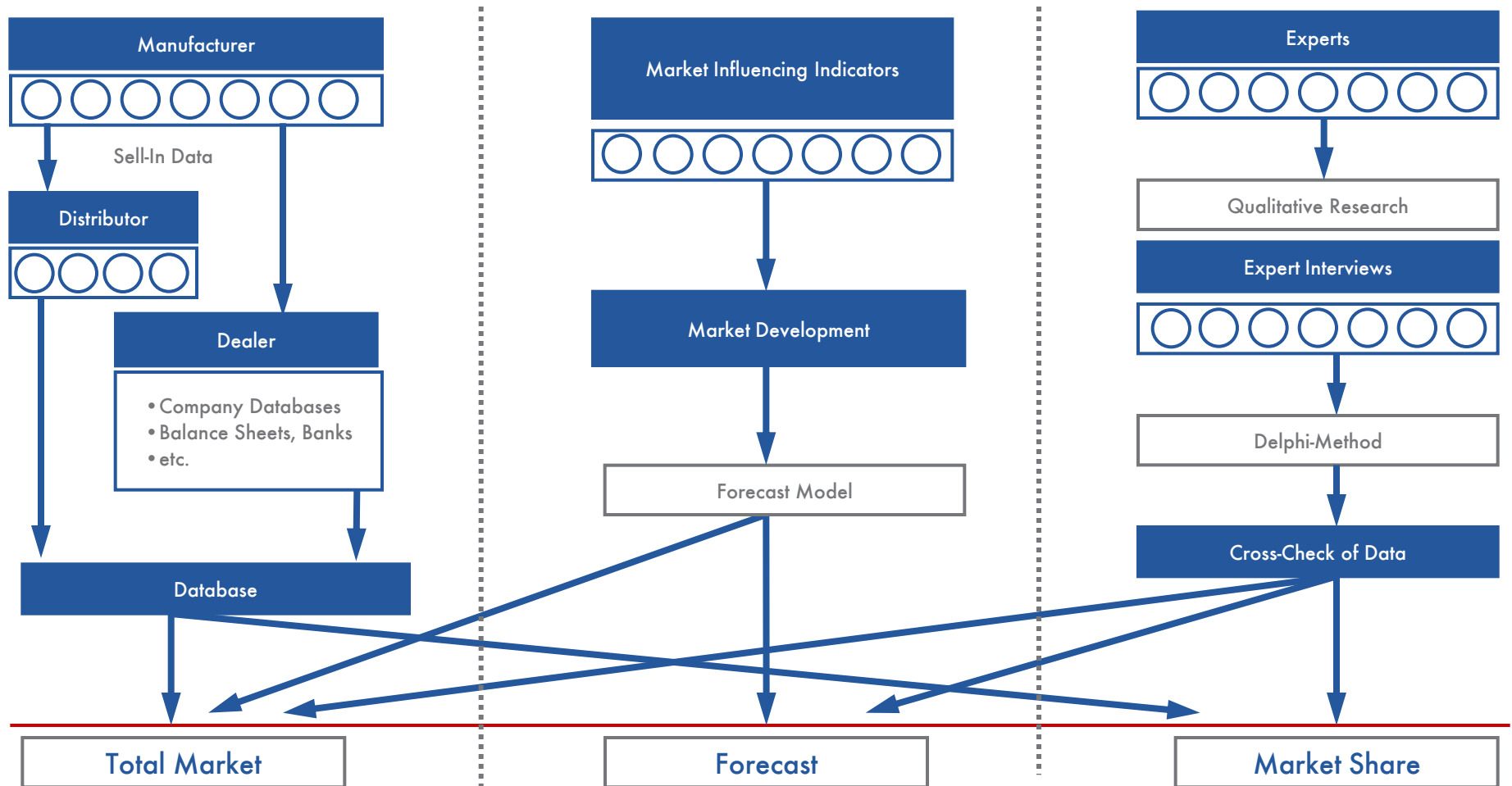
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

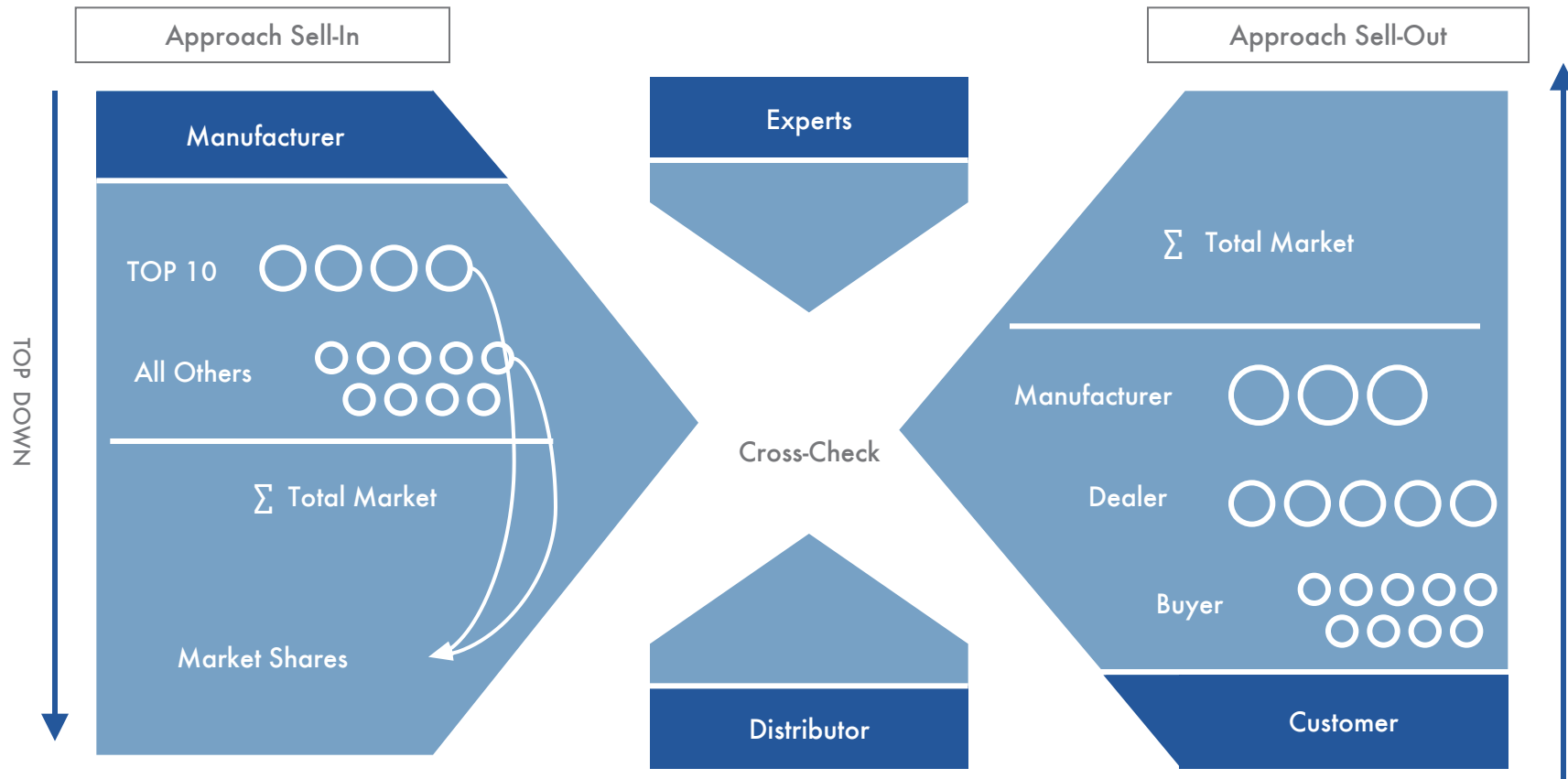
Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology

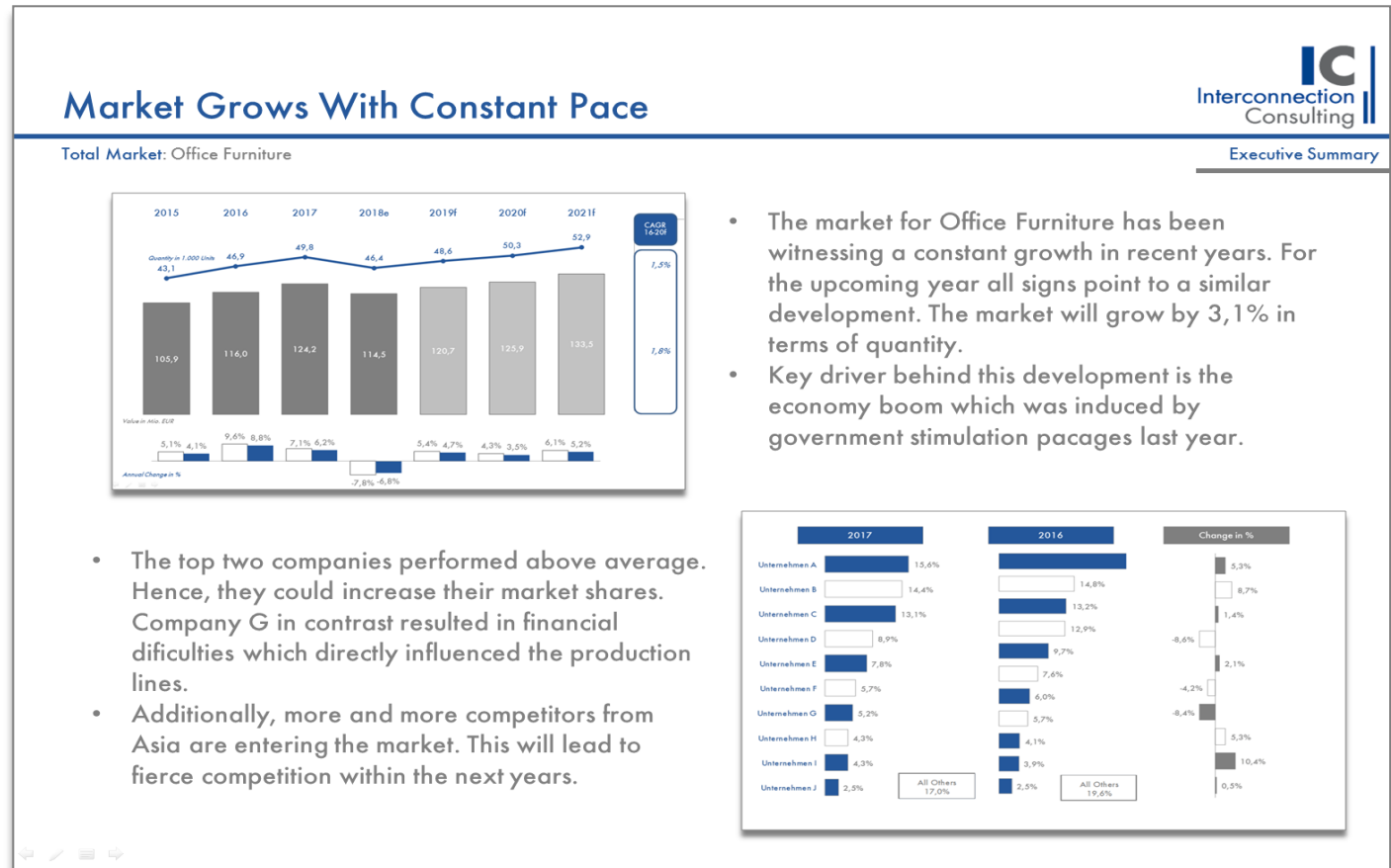


The IC Market Tracking® is modularly built and consists of the following sections:

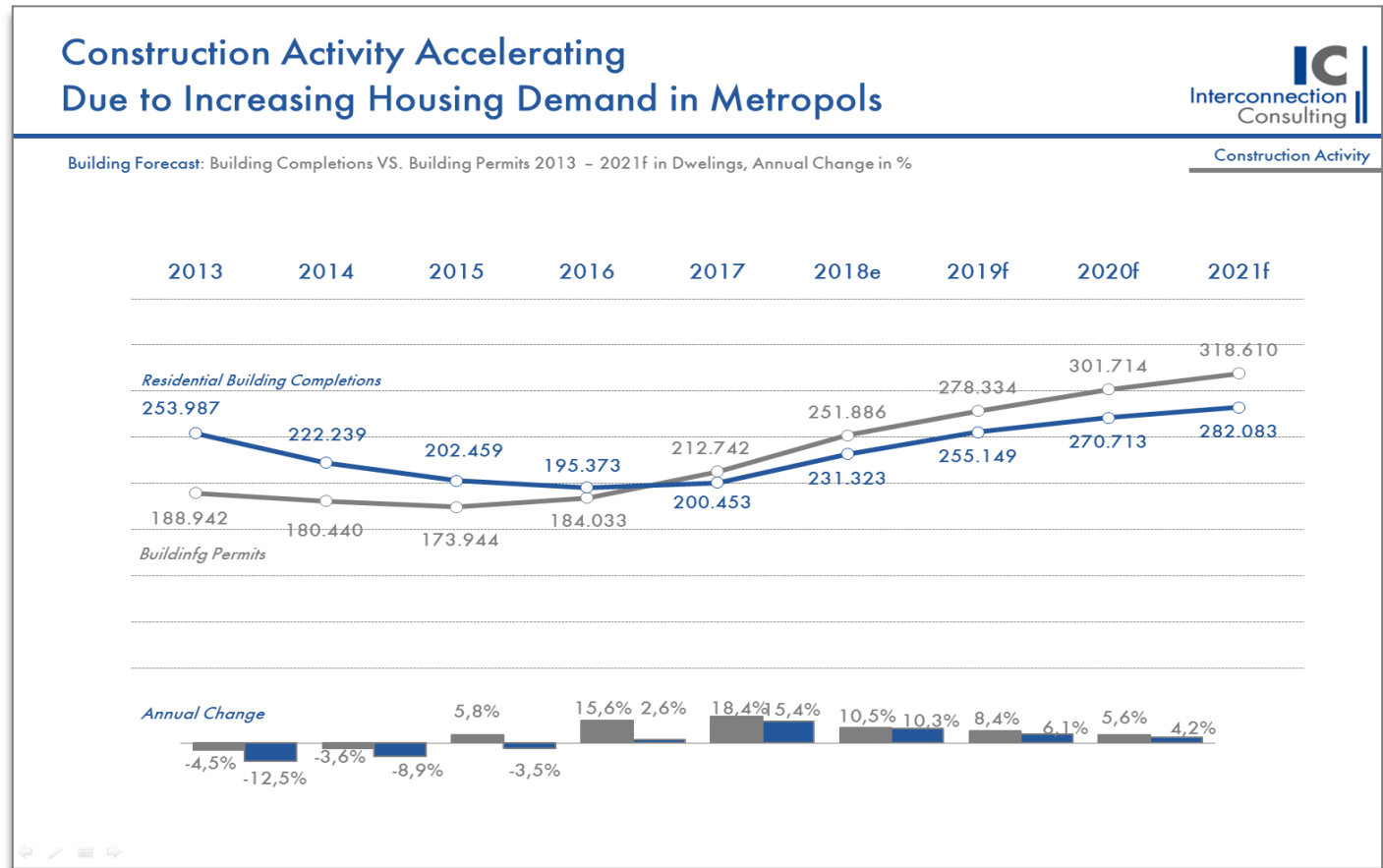
- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analyzed in the **Economic Environment**: You will find the most important data on consumer behaviour, 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.

Executive Summary at the Beginning of the Report

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

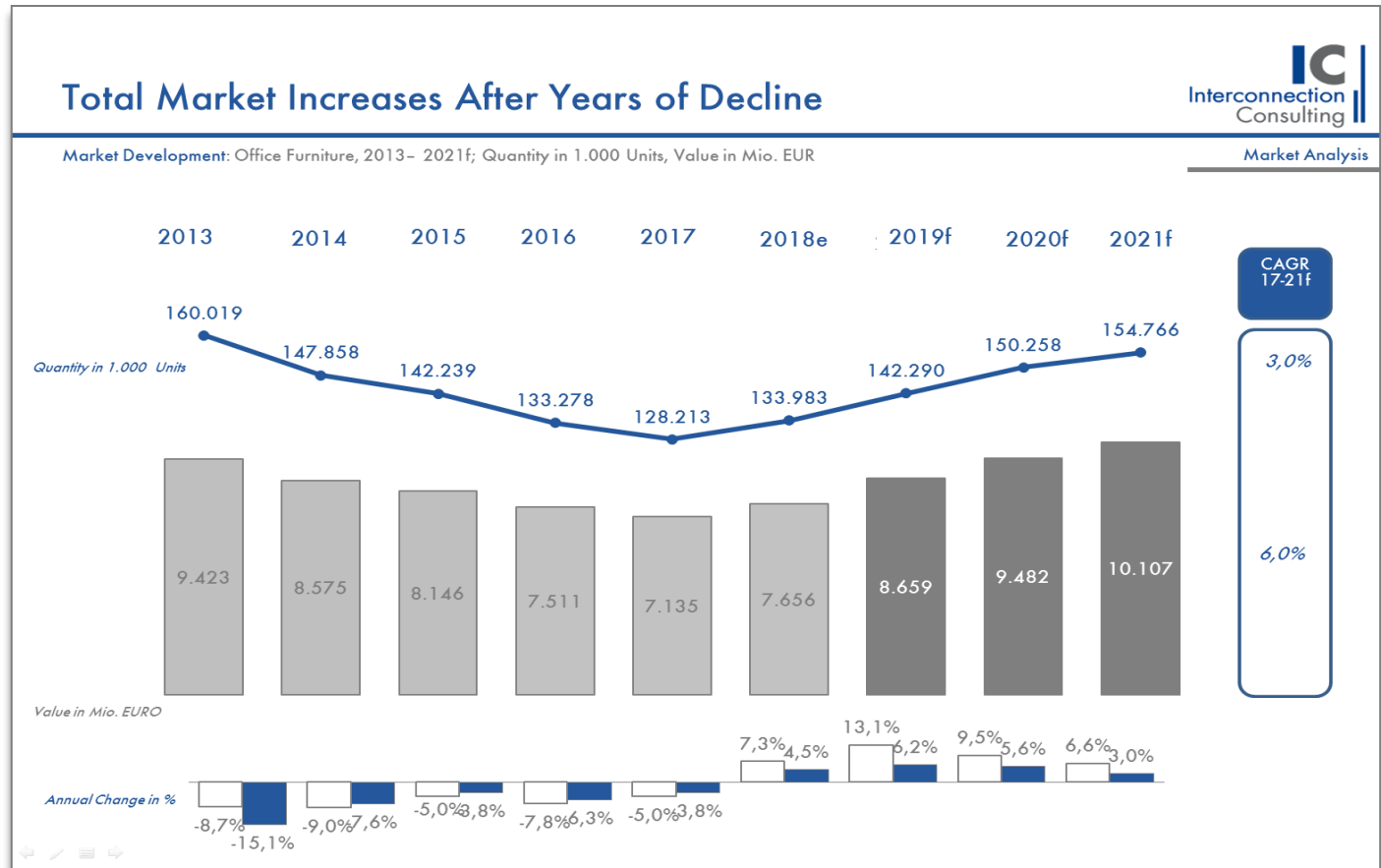


- ❑ The data for the market environment consists of main factors such as general economy data, demography, income statistics and sentiment indicators.
- ❑ This chart shows dummy figures.



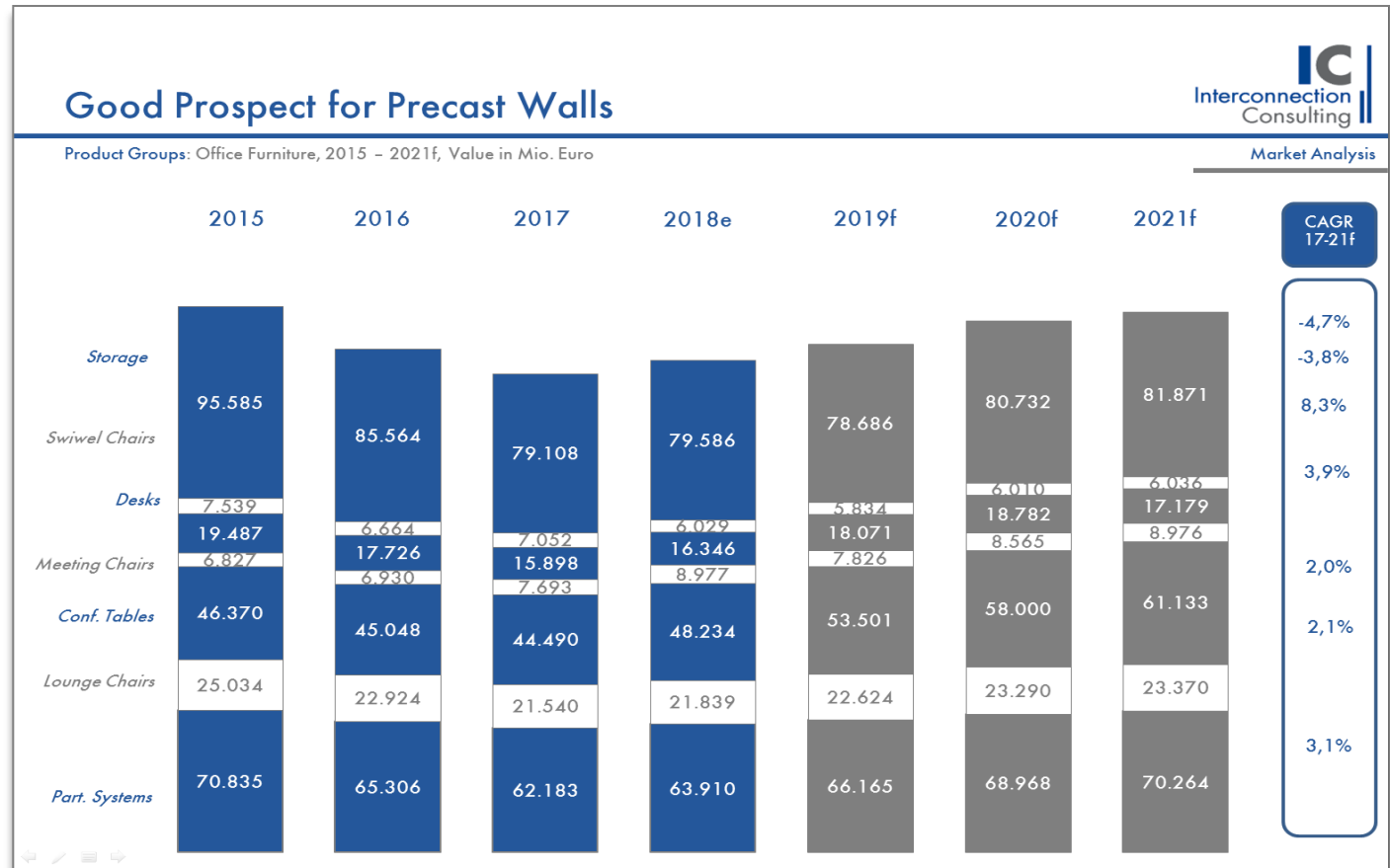
Total Market Development and Forecast

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

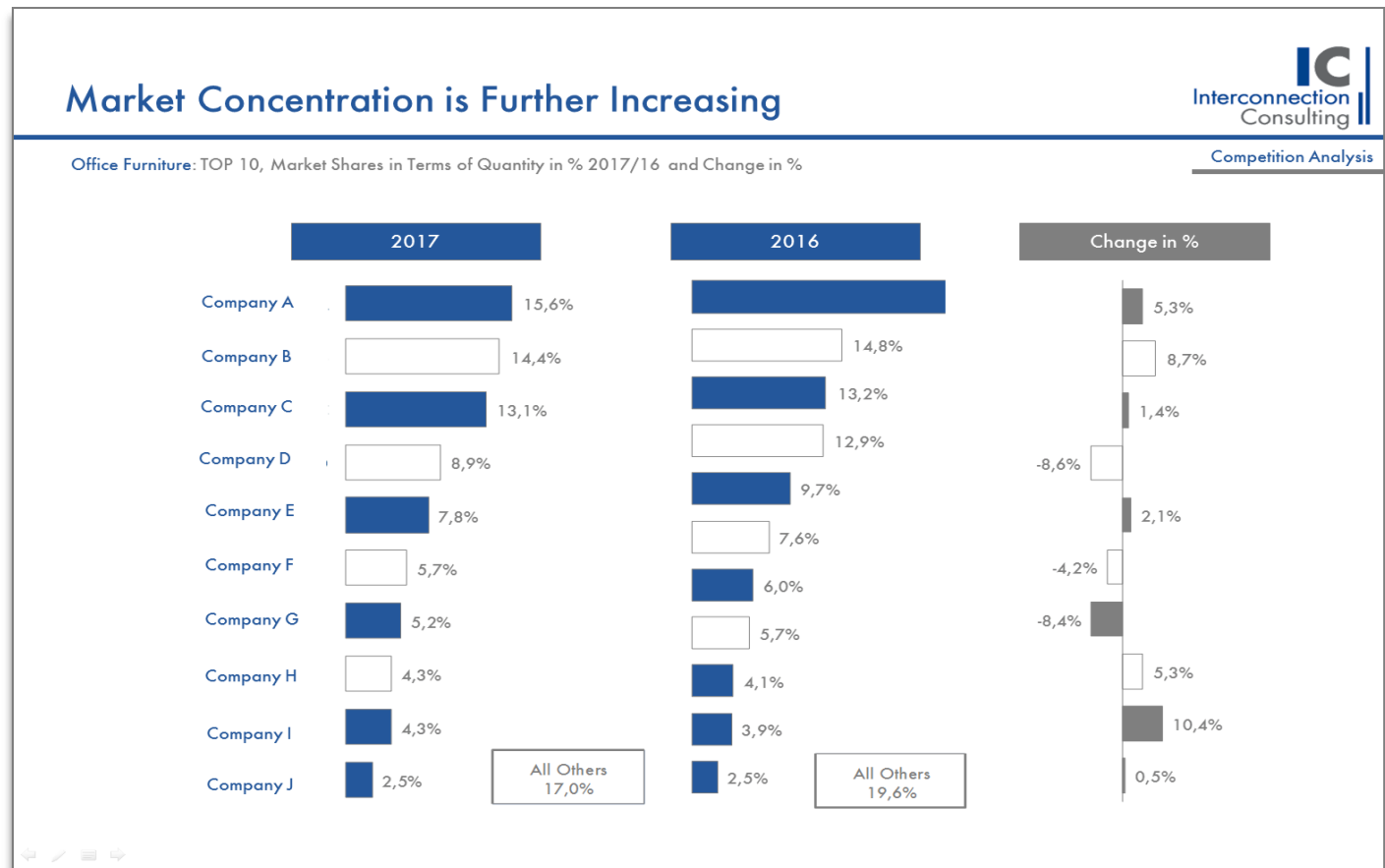


Trend-Analysis Regarding Product Groups, etc.

- ❑ Overview of the different product groups, their distribution channels, segments including trends for the upcoming three years
- ❑ This chart shows dummy figures.



- ❑ Detailed presentation of most important companies regarding market shares, development, etc.
- ❑ This Sample Chart shows fictive figures.



- Additionally to the visualised 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)


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 - #	
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

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

Dieses Chart zeigt fiktive Zahlen zur Illustration

	Single Issue	IC Subscription *	Scale of Discounts
CEE Total **	€ 9.950,-		€ 5.000 -15%
Single Country	€ 1.950,-		€ 10.000 -30%

Available Countries
<div style="display: flex; justify-content: space-around; align-items: flex-start;"> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Bulgaria</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Czech Republic</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Hungary</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Romania</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Slovakia</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Slovenia</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Poland</div> </div> <div style="display: flex; justify-content: space-around; align-items: flex-start; margin-top: 10px;"> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Russia</div> <div style="border: 1px solid black; padding: 5px; margin: 2px;">Ukraine</div> </div>

* **IC Subscription:** 20% 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.

** Price taking into account the scale of discount
Price includes an interactive PDF Document. All prices shown exclude sales tax

*** Additional countries available on request

Your Advantages as a Subscription Customer

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 window industry.
- Our studies support the leading companies in defining targets and marketing strategies, including 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 several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



Our Market-Intelligence Tools

Market Analysis




- Market Volume
- Market Shares & Entry
- Competition Analysis

Distribution Analysis



- 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 Satisfaction




- Importance/Satisfaction Portfolios
- Customer Loyalty
- Customer Typology

Price Research



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

E-Commerce



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

Chosen References



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

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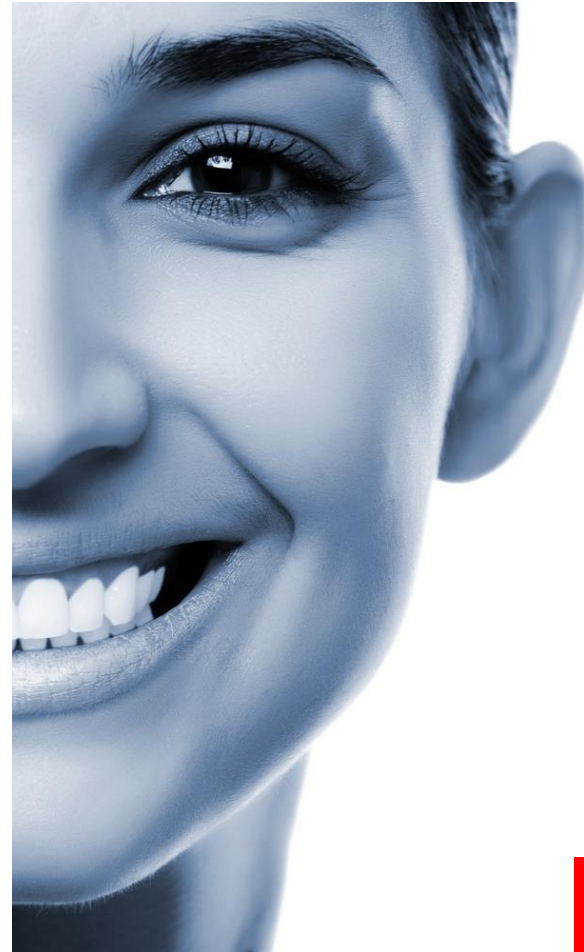
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Inquiry

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 365
- Optional: Hard Cover

Price

- Country: 1.950 €
- All regions: 9.950 €
- Hard Cover: 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

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: construction environment, main economic indicators, labor market, business culture;

Total Market Analysis

Total market development and forecasts for all market segments by regions, product groups, business segments and distribution channels.

Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each product and segment for the last two years.

Market Structure

Regions:

Bulgaria, Czech Republic, Hungary, Romania, Slovakia, Slovenia, Russia, Ukraine, Poland

Product Groups

Storage, Desks, Meeting Tables, Partitioning Systems, Swivel Chairs, Meeting Chairs, Lounge Chairs;

Business Segments

Executive Segment
Operational Segment

Distribution Channels

Direct Trade, Indirect Trade

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 analyzed 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.

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E-Mail: office@interconnectionconsulting.com



Yes, we would like to order the
IC Market Tracking® Office Furniture in CEE 2018
(Please, print out the order form and mark your desired products)

**IC SUBSCRIPTION
20 % PRICE ADVANTAGE**

Industry/Region	Single Issue
<input type="checkbox"/> Poland	1.950,- EUR
<input type="checkbox"/> Czech Republic	1.950,- EUR
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<input type="checkbox"/> Hungary	1.950,- EUR
<input type="checkbox"/> Slovenia	1.950,- EUR
<input type="checkbox"/> Russia	1.950,- EUR
<input type="checkbox"/> Romania	1.950,- EUR
<input type="checkbox"/> Bulgaria	1.950,- EUR
<input type="checkbox"/> Ukraine	1.950,- EUR
<input type="checkbox"/> CEE Total	9.950,- EUR

Order Form

- Abonnement (20% Price Advantage)*
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- We would like to order additional hard copies, each for € 150
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- Info-Hotline: answering of questions with regards to the report and on methodological issues relating to market research
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- Easy termination: After 2 issues each subscription can be terminated easily

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