



IC Market Tracking®

**Office Furniture
in Europe 2021**

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2017 – 2020 for the total market development as well as
 - Product Groups
 - Price Segments
 - Customer Segments
 - Distribution Channels
- Forecasts from 2021 – 2024 for the total market as well as each analysed segment and subsegment

COMPETITION ANALYSIS

- Market shares of the top players for 2019/20
 - 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

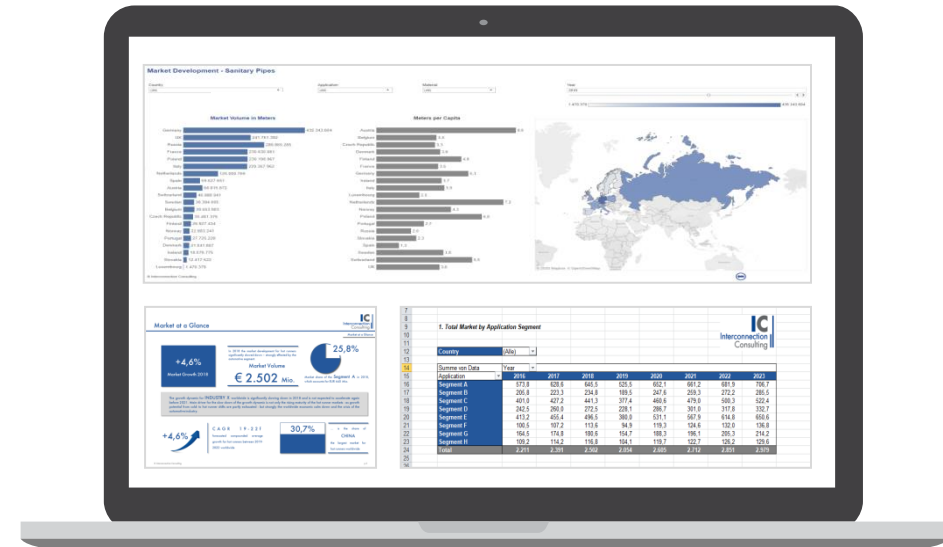
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of 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 xls. cvs. jpg. or other formats for your own integration
 - Graphs
 - Raw Data



Market Intelligence Tool and Reports

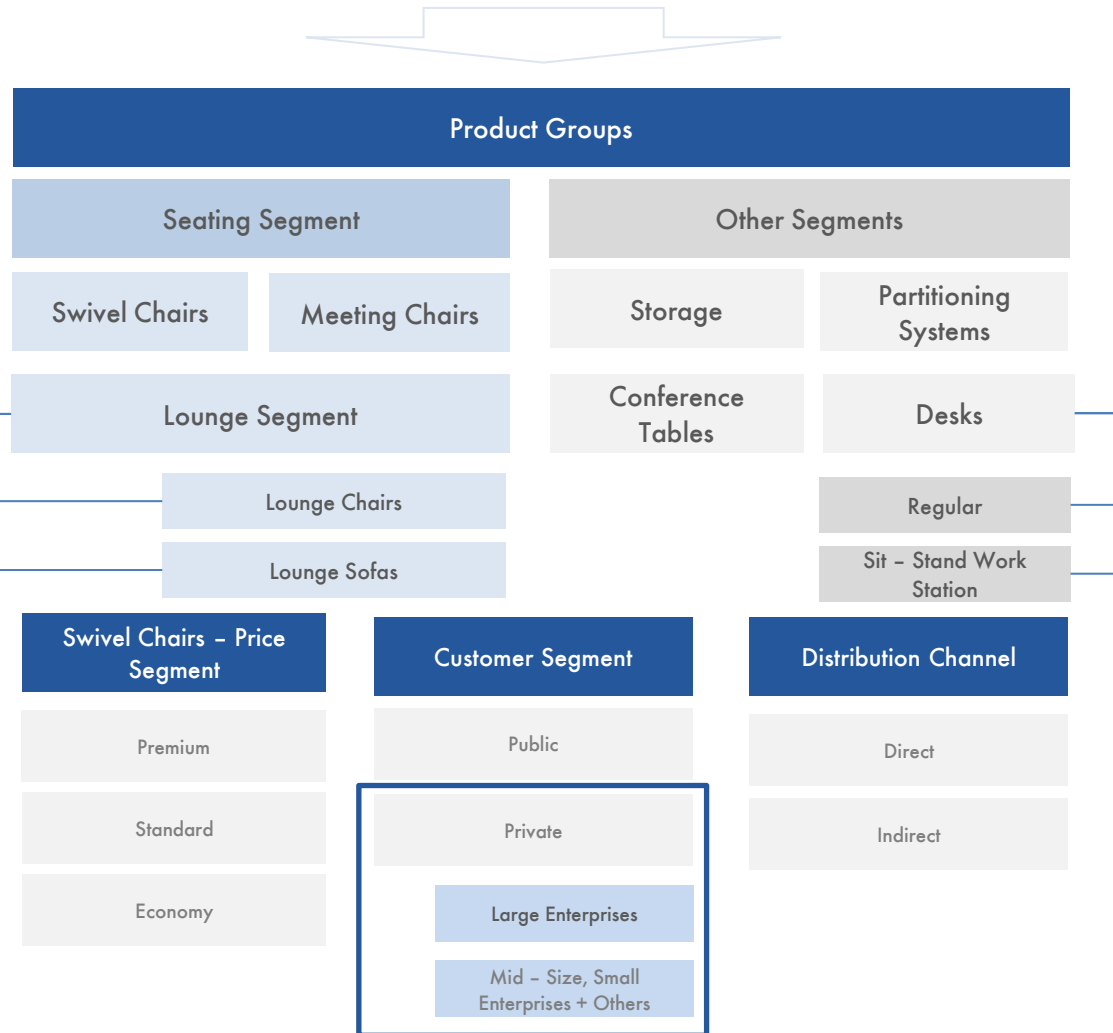


Online Dashboards

Executive Reports

Pivot Tables

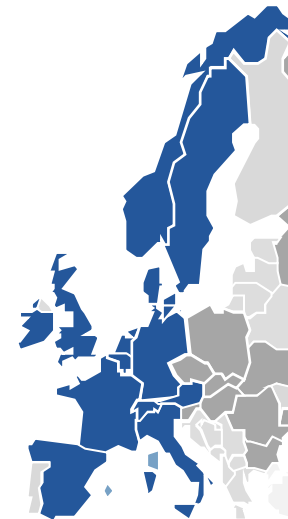
Market Report Structure



Available Countries

Western Europe

- Belgium & Luxembourg
- Denmark
- Germany
- Finland
- France
- UK
- Italy
- Netherlands
- Norway
- Austria
- Spain
- Sweden
- Switzerland

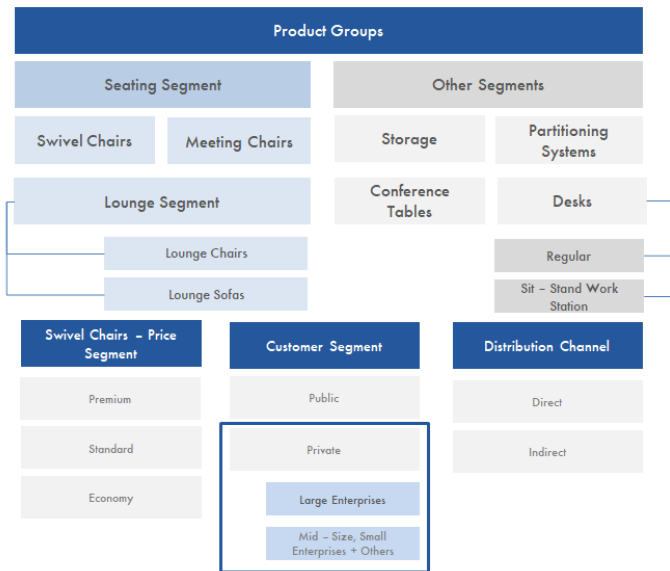


Central & Eastern Europe:

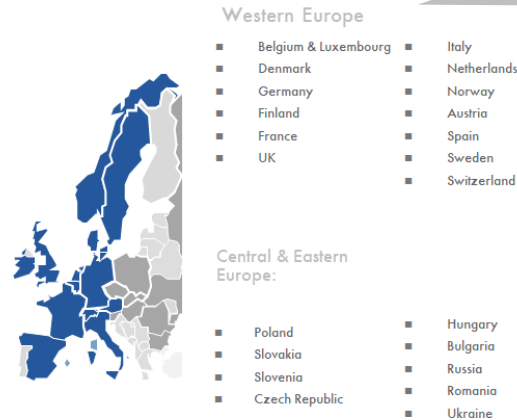
- Poland
- Slovakia
- Slovenia
- Czech Republic
- Hungary
- Bulgaria
- Russia
- Romania
- Ukraine

- 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 Report Structure



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- 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	<p>Seating Segment</p> <p>The data is presented in terms of value and quantity</p> <ul style="list-style-type: none"> Swivel Chairs: Swivel Chairs Meeting Chairs: Folding chairs for large meetings and arm or easy chairs for conference rooms <p>Lounge Segment</p> <p>Including reception / break room area chairs and sofas</p> <ul style="list-style-type: none"> Lounge Chairs Lounge Sofas
2	<p>Other</p> <p>The data is presented in terms of value</p> <ul style="list-style-type: none"> 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

The data is stated in terms of value.

500,- € +

Standard

200 - 499,- €

Economy

less than 200,- €

Distribution

Direct

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.

Indirect

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
Private
Large Enterprises
Mid - Size ,Small Enterprises + Others

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.

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

250 employees or more

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

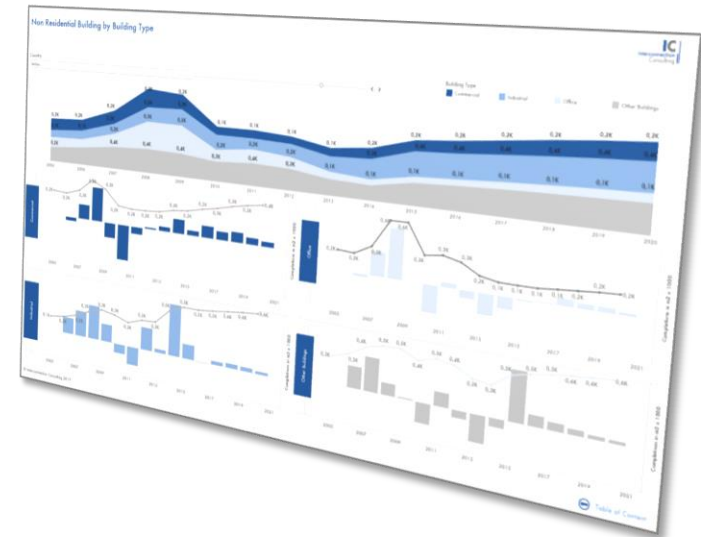
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

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

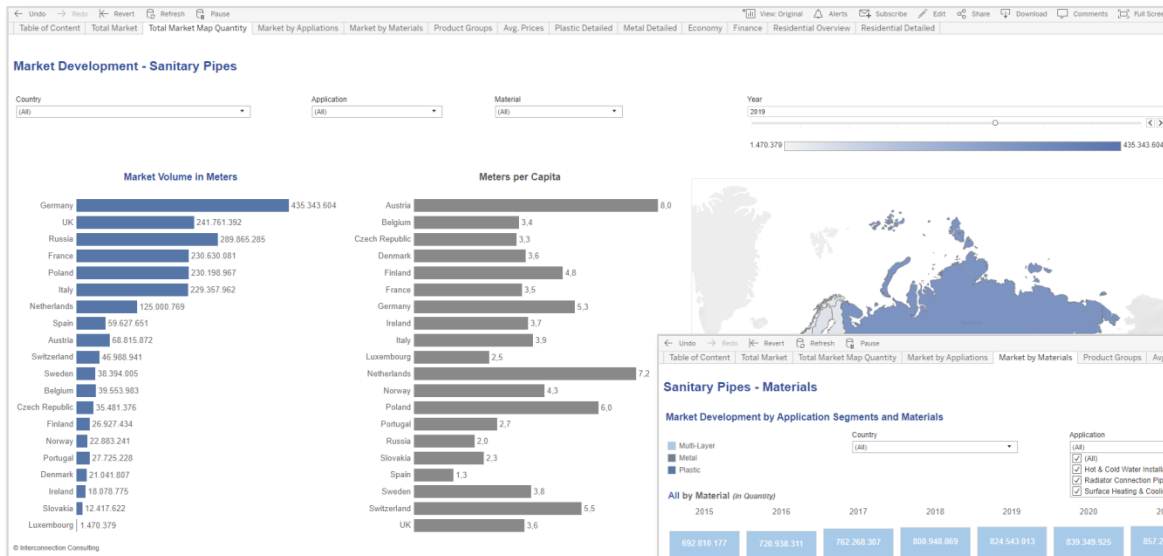


Usability of the Market Intelligence Tool

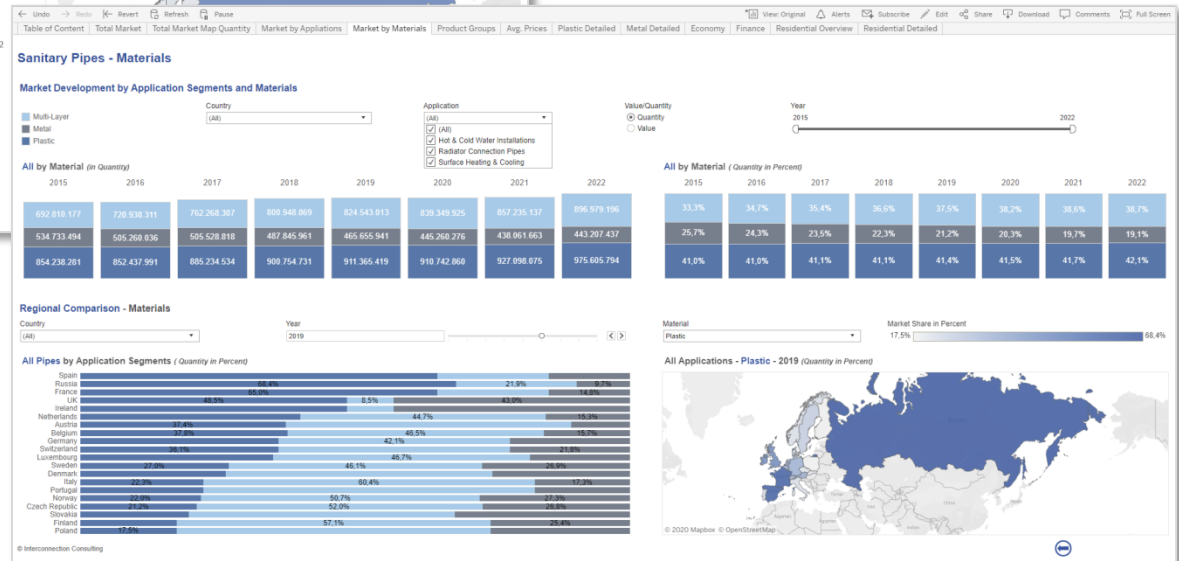
Let's Put it in a Video...



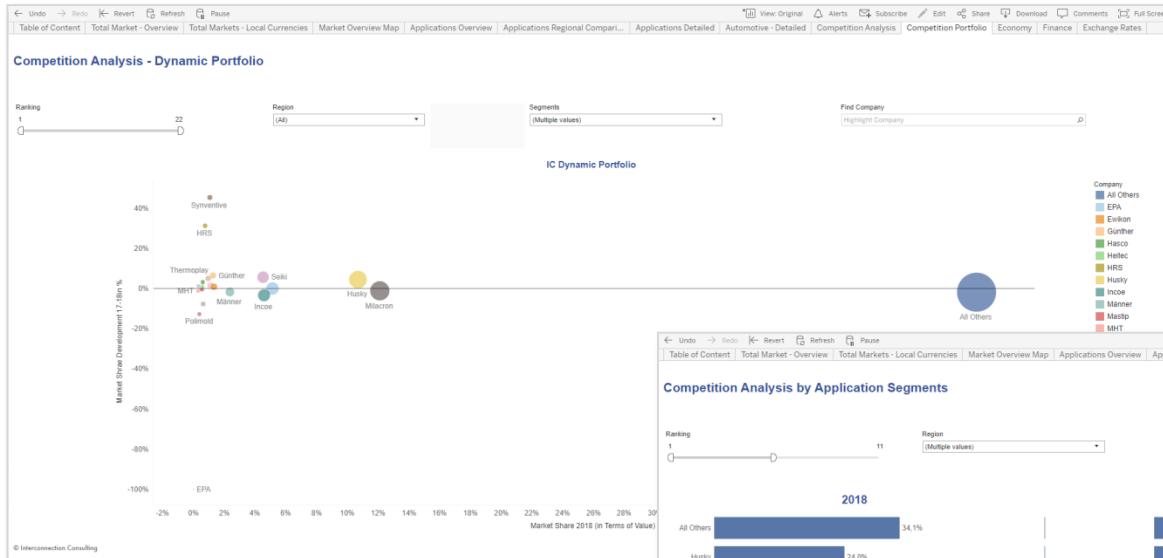
Sample Cockpits for Market Analysis Data



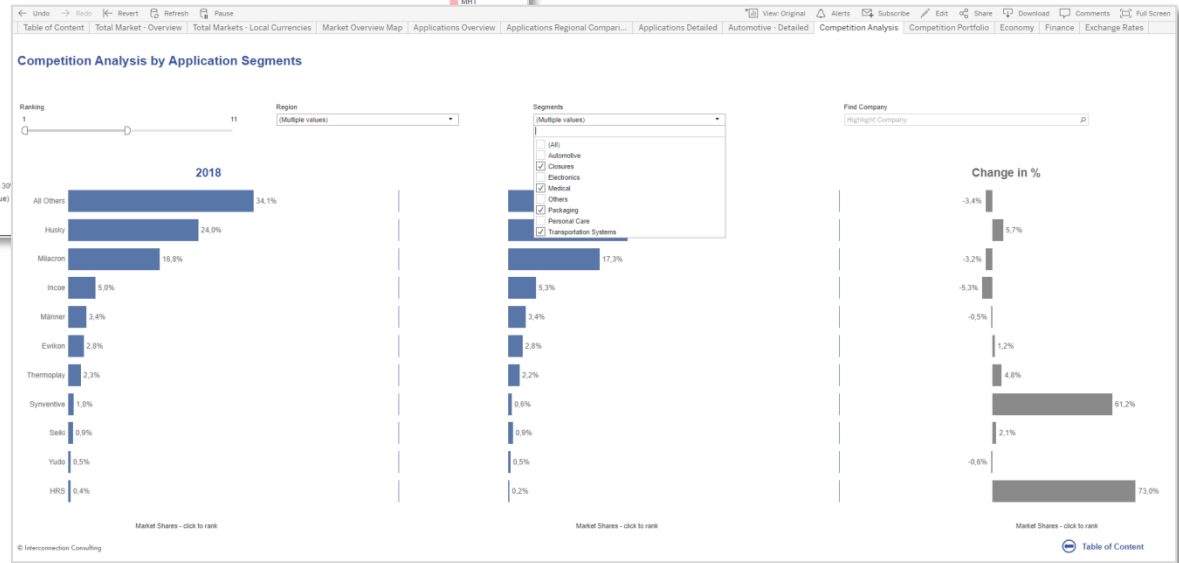
This chart contains fictive data



Sample Cockpits for Competition Data

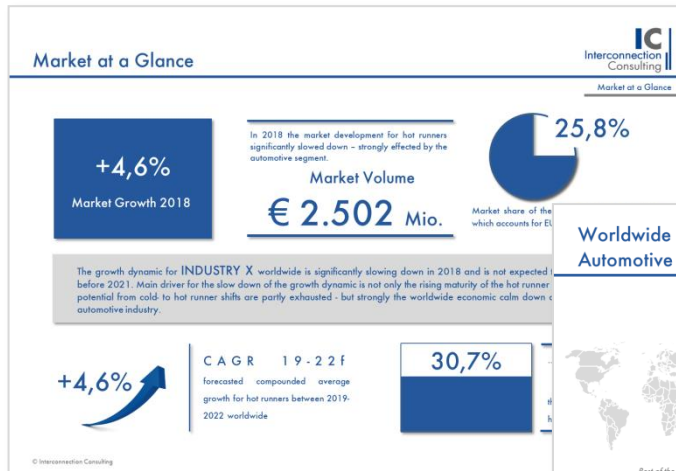


This chart contains fictive data

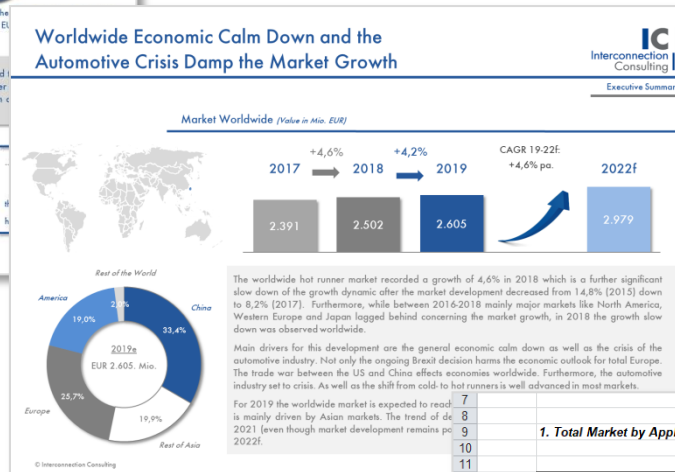


Additional Deliverables

Executive Summary and Pivot-Tables



Executive Summary as PDF (fictive data)



Executive Summary as PDF (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
Total	2.211	2.391	2.502	2.054	2.605	2.712	2.851	2.979

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

Investment Plan for Your Market Research

	Subscription*
Single Country	€ 1.950,-
Western Europe	€ 9.900,-
Central & Eastern Europe	€ 7.900,-
All Countries	€ 15.999,-
10 Countries Package	€ 8.900,-

Single Issue

+25% for Single Issues

Available Countries	Western Europe	<ul style="list-style-type: none"> ■ Belgium & Luxembourg ■ Denmark ■ Germany ■ Finland ■ Switzerland 	<ul style="list-style-type: none"> ■ France ■ UK ■ Italy ■ Netherland 	<ul style="list-style-type: none"> ■ Norway ■ Austria ■ Spain ■ Sweden
	Central & Eastern Europe	<ul style="list-style-type: none"> ■ Poland ■ Slovakia ■ Slovenia ■ Czech Republic ■ Romania 	<ul style="list-style-type: none"> ■ Hungary ■ Bulgaria ■ Russia ■ Ukraine 	<ul style="list-style-type: none"> ■ Other countries on Request

- **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





Our Market-Intelligence Tools



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

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we show you the way

Yes, we would like to order the IC Market Tracking® Office Furniture in Europe 2021

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

Please choose from the available countries

Western Europe

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|--------------------------------------|--------------------------------------|----------------------------------|------------------------------------|
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Central & Eastern Europe

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25% price advantage		✓
IC Cockpit – Online Dashboard Solution	✓	✓
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