



IC Market Tracking®

Refrigerated Display Cabinets  
in Central and Eastern Europe  
2020

# What Do You Get - Your Benefits at a Glance

## Content of the Report

### Market Data, Insights and Expertise...



#### MARKET ANALYSIS

- Historical market data from 2016 – 2019 for the total market development as well as
  - Product Groups
  - Product Type
  - Cooling Type
  - Cooling Segment
  - Refrigerant Type
- Forecasts from 2020 – 2023 for the total market as well as each analysed product group, product type, cooling type, cooling segment and refrigerant type

#### 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

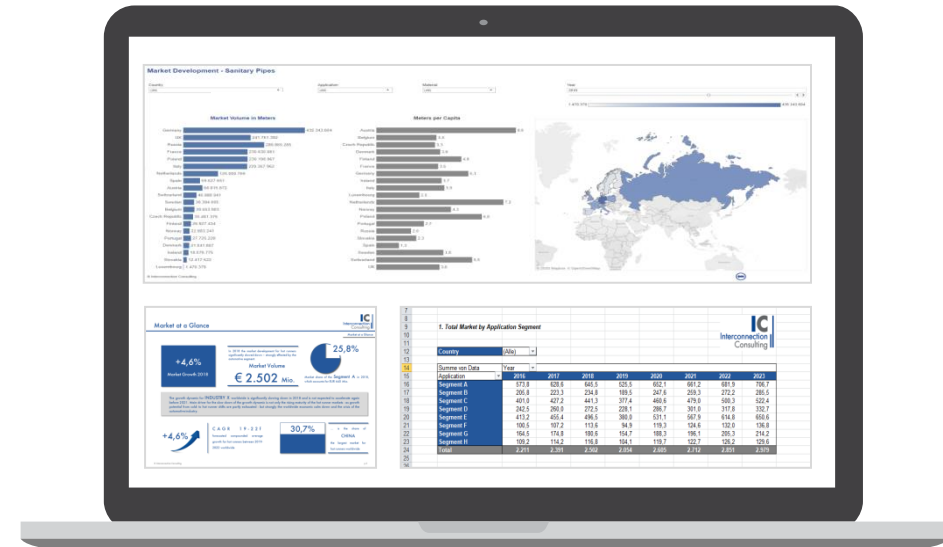
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of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

#### EXECUTIVE REPORTS

- 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® Refrigerated Display Cabinets in Central and Eastern Europe 2020



Product Groups	Product Type	Cooling Type	Cooling Segment	Refrigerant Type
Vertical Display Cases	Remote	Gravity Cooling	Freezer Cabinets	HFC
Horizontal Display Cases - Islands	Plug-In	Convection Cooling	Cooling Cabinets	HFO
Impulse Cabinets			Switchable	Hydrocarbons / Propane
Cooling Counters				CO2

# Market Structure - Interpretation

## IC Market-Tracking® Refrigerated Display Cabinets in Central and Eastern Europe 2020

Bulgaria	Romania	Slovakia	Czech Republic	Hungary
	Poland	Croatia	Russia	

Product Groups	Product Type	Cooling Type	Cooling Segment	Refrigerant Type
Vertical Display Cases	Remote	Gravity Cooling	Freezer Cabinets	HFC
Horizontal Display Cases-Islands	Plug-In	Convection Cooling	Cooling Cabinets	HFO
Impulse Cabinets			Switchable	Hydrocarbons / Propane
Cooling Counters				CO2

- Market data are available for each country separately as well as aggregated for the package purchased.
- Each country report includes data for the product groups, product types, cooling types, cooling segments and refrigerant types separately as well as aggregated for the total market of refrigerated display cabinets in terms of value and quantity.

## Turnover

Turnover is stated in 1.000 Euro. Values are always Net-Turnovers (No List-Prices), discounts included.

## Product Groups

Vertical Display Cases

One side opened refrigerator for self-service. Length, height and number of shelves optional.

Horizontal Display Cases  
- Islands

Open or closed cabinets mostly for storing frozen goods, placed between the aisles in a store.

Impulse Cabinets

Open or closed cabinets similar to the island cabinets, where the one side of the cabinet faces the aisle and the other side faces the wall.

Cooling Counters

For presentation purposes of fresh groceries such as meat, cheese or vegetables. An optional glazing layer can avoid the idea of self-service, but is not mandatory.



# Definitions and Demarcation

## Product Type

Remote

Cooling furniture, which are connected via piping to a central compressor unit.

Plug-In

Integral refrigerated cabinets containing the refrigeration unit in the housing.

## Cooling Type

Gravity Cooling

Cooled air drops due to its higher density and pushes warm air away.

Convection Cooling

Cooled air is being circulated by fans.

## Cooling Segment

Freezer Cabinets

Refrigeration units in the negative temperature range.

Cooling Cabinets

Refrigeration units in the positive temperature range.

Switchable

It is possible to switch manually between cooling and freezing.

# 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

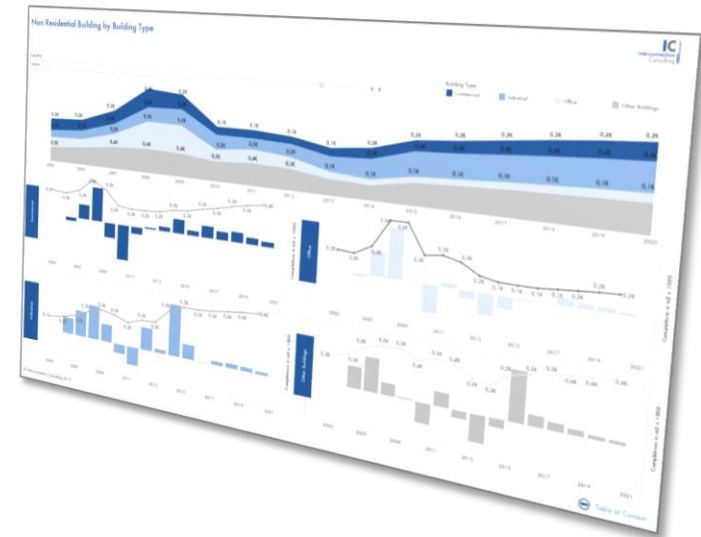
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

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

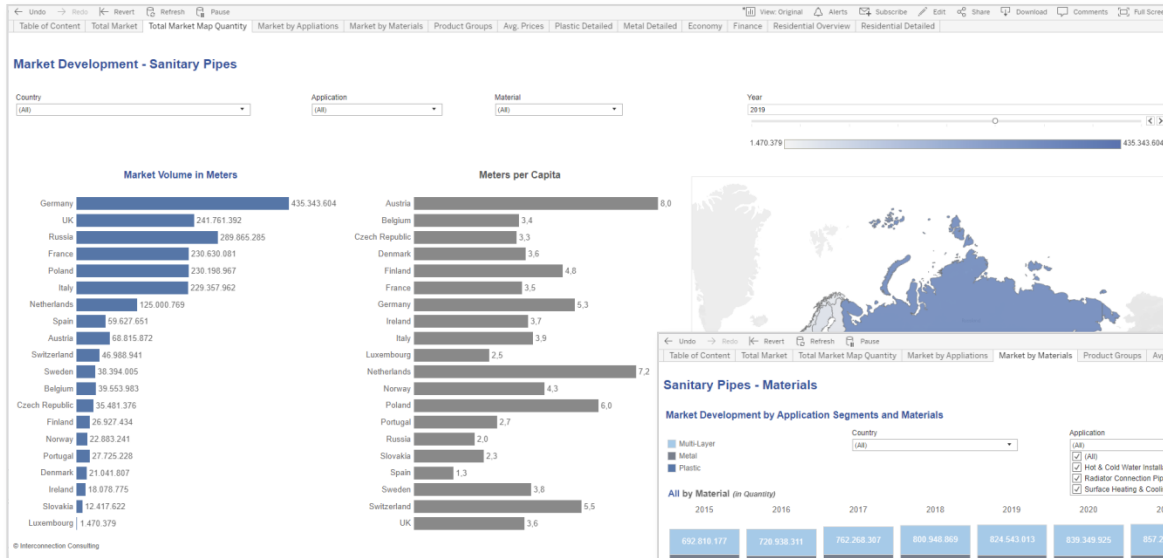


# Usability of the Market Intelligence Tool

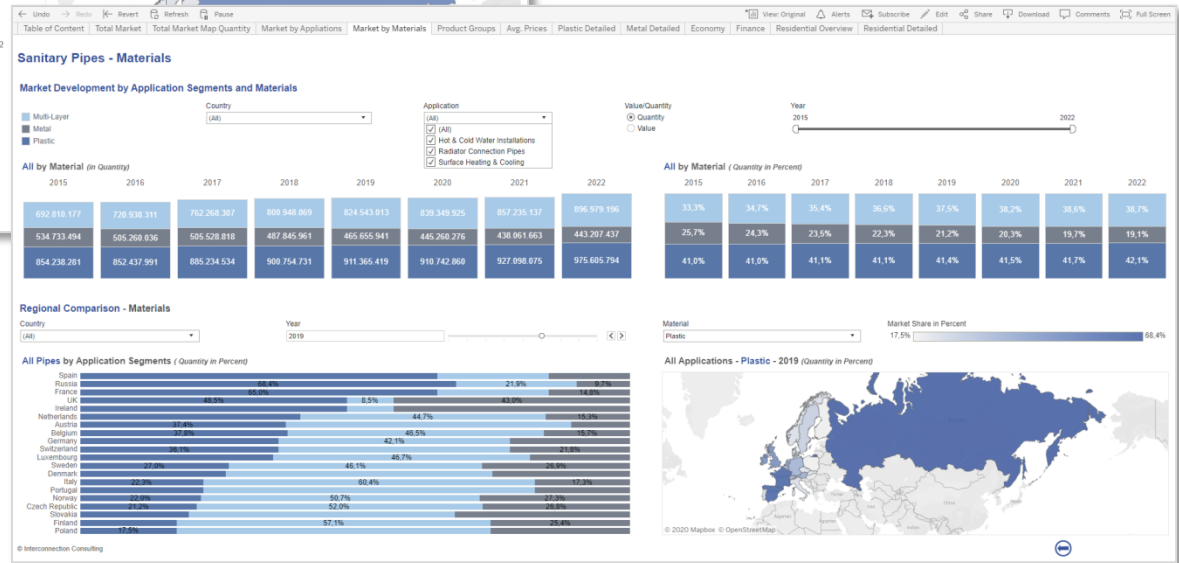
Let's Put it in a Video...



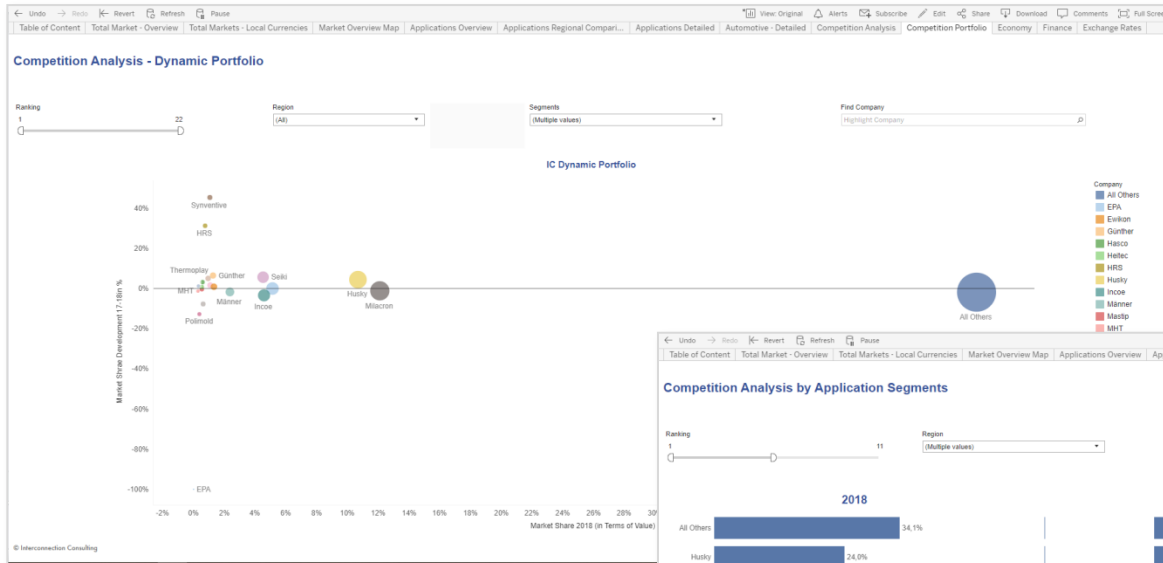
# Sample Cockpits for Market Analysis Data



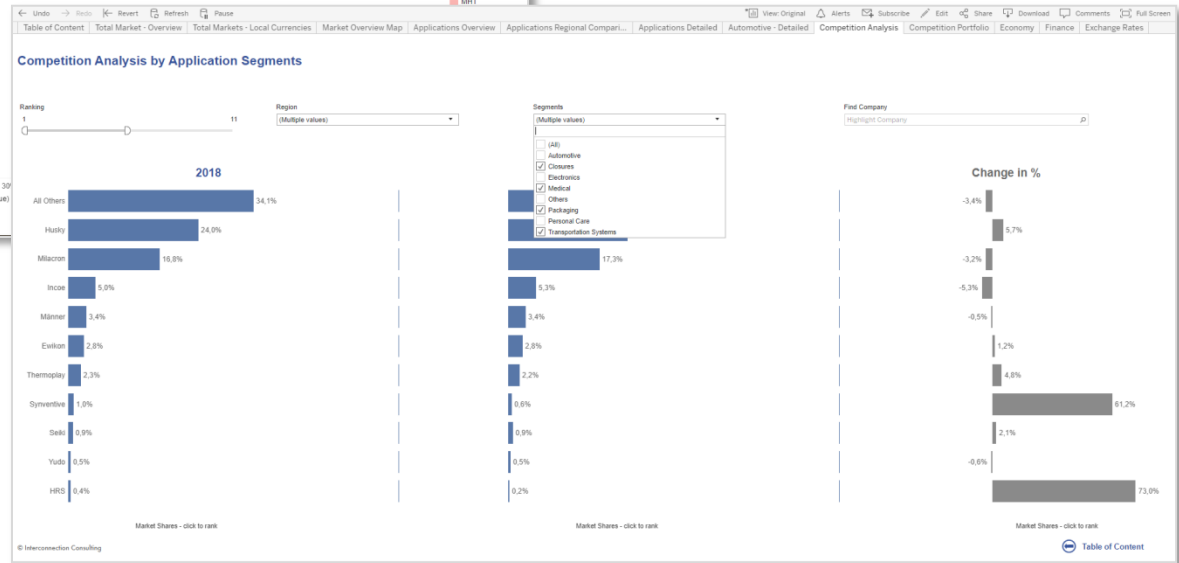
*This chart contains fictive data*



# Sample Cockpits for Competition Data

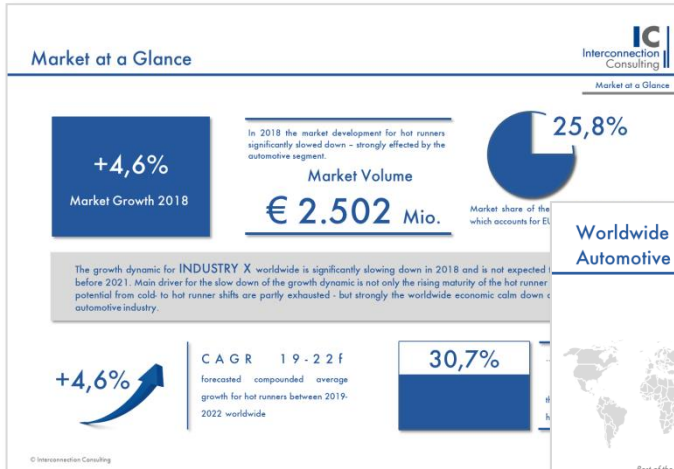


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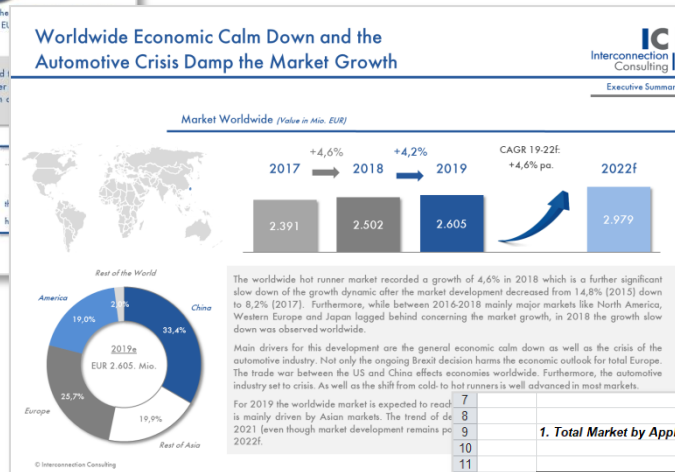


# Additional Deliverables

## Executive Summary and Pivot-Tables



Executive Summary as 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
<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® Refrigerated Display Cabinets in Central and Eastern Europe 2020

Prices & Conditions

	2 Countries of Your Selection	Full Package		
Subscription *	€ 5.950,-	€ 17.950,-		
Available Countries/Regions	Bulgaria Hungary	Romania Poland	Slovakia Croatia	Czech Republic Russia



- 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 automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.

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.

*„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



In case of 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® Refrigerated Display Cabinets in Central and Eastern Europe 2020**

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

Please choose from the available countries

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

- 2 Countries Package ..... EUR 5.950.-
- Full Package ..... EUR 17.950.-

	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		✓

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Date	Name	Signature
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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.

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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