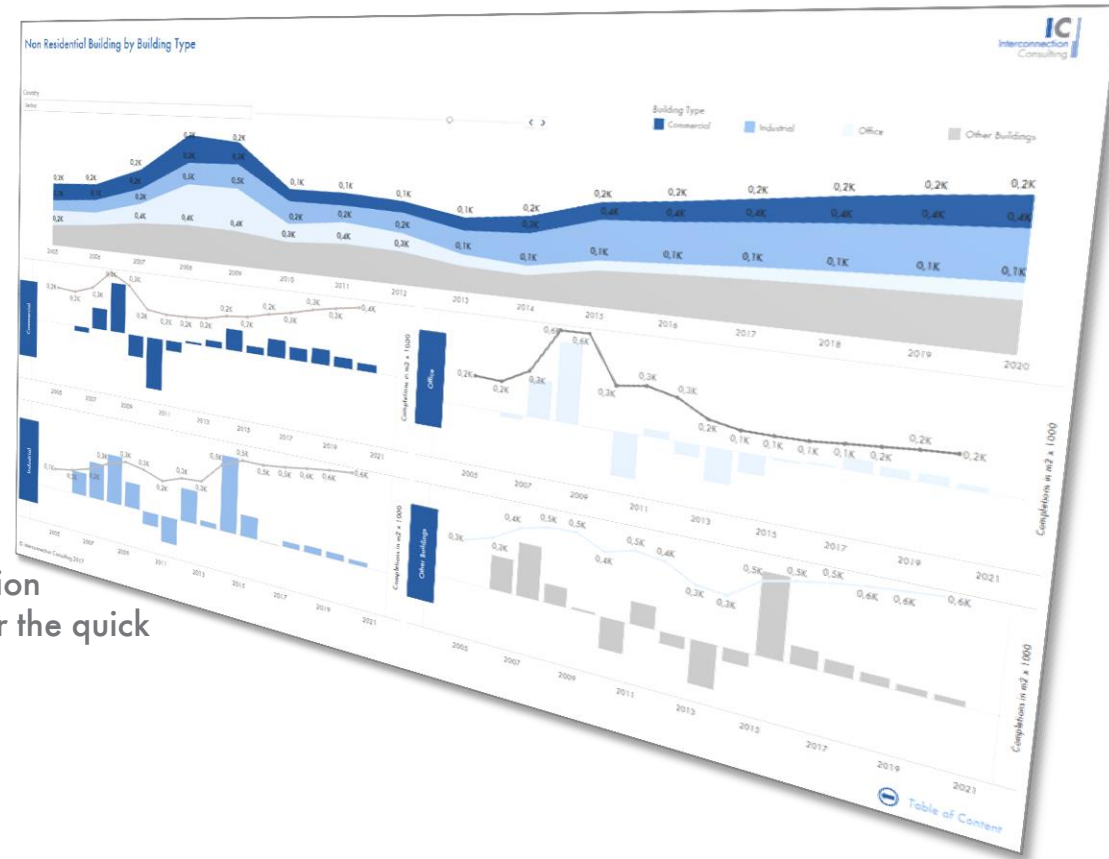




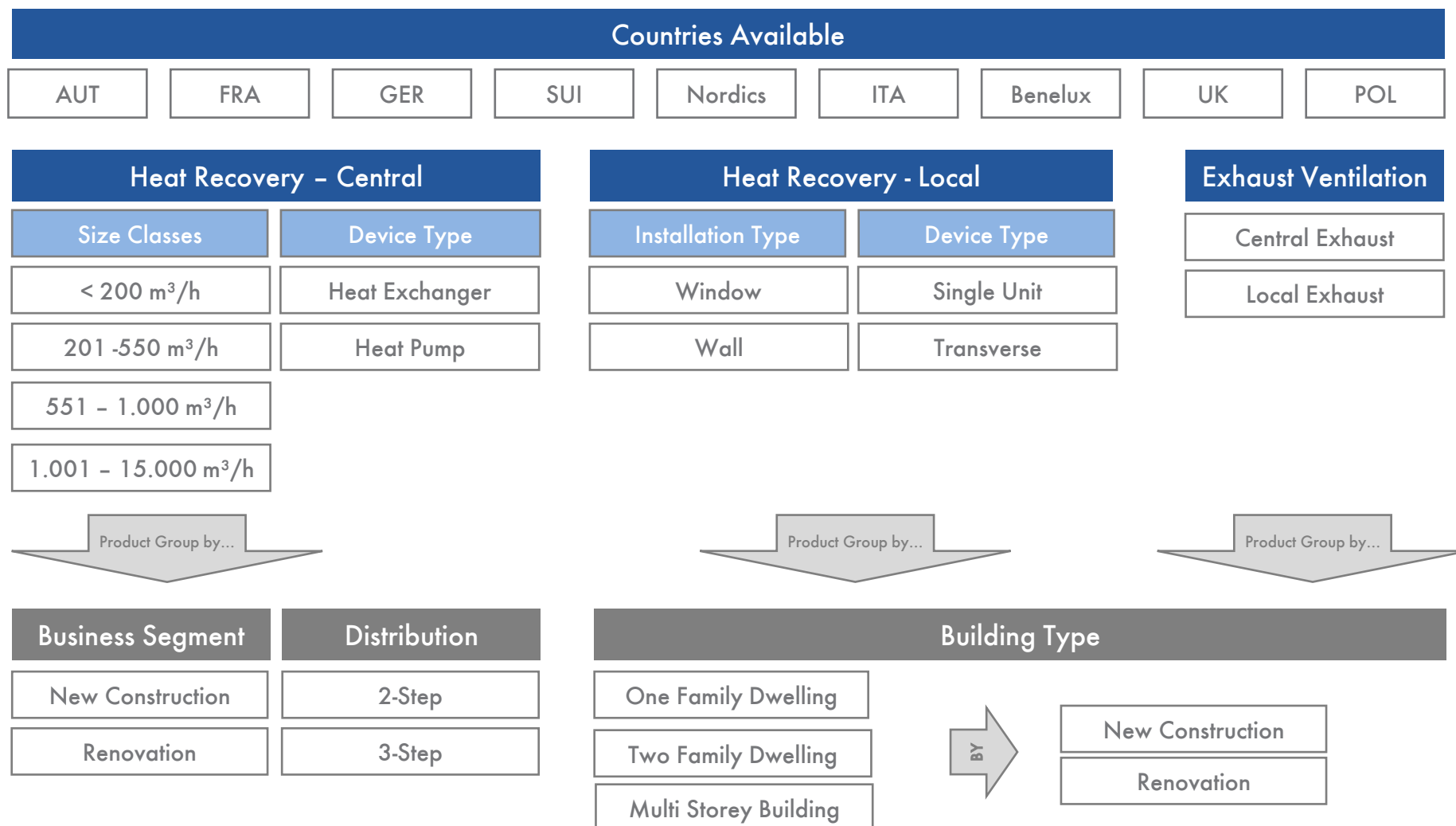
IC Market Tracking  
Residential Ventilation  
Systems in Europe  
2020

# Your Benefits at a Glance

- ✓ You will receive a **Tableau Data Cockpit** and as well a PDF regarding the **Total Market** and as well for the different **market segments**.
- ✓ **Market Forecasts** for all product segments and regions for the upcoming three years, based on our econometric indicator models.
- ✓ **Competition Analysis** with **market shares** and development for the last 2 years in comparison to other major competitors and with respect to:
  - Total Market
  - Regional Markets
  - Product Groups and Segments
  - Distribution Channels
  - Building Types
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation in our interactive dashboard-solution "Tableau", including download/ export functionality for the quick implementation of the data.



# Residential Ventilation Systems in Europe 2020



The Study Contains Market Shares of 2018-19 as well as a Market Forecast up to 2023f

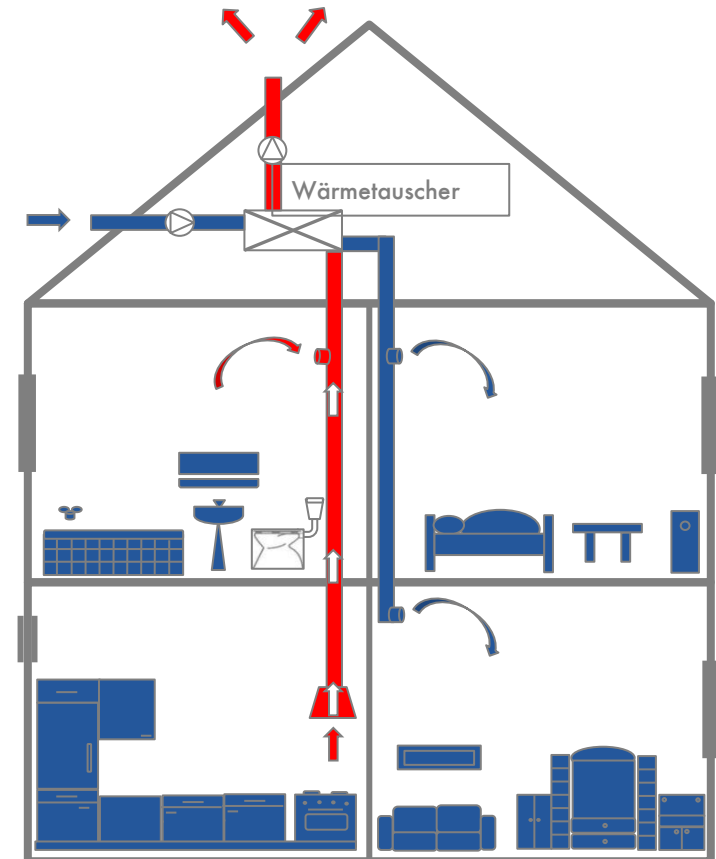
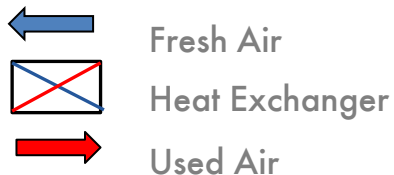
# Air Handling Units with Heat Recovery

## 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 m<sup>3</sup>/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 m<sup>3</sup>/h

Typical single-family house segment

551 – 1.000 m<sup>3</sup>/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 m<sup>3</sup>/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.

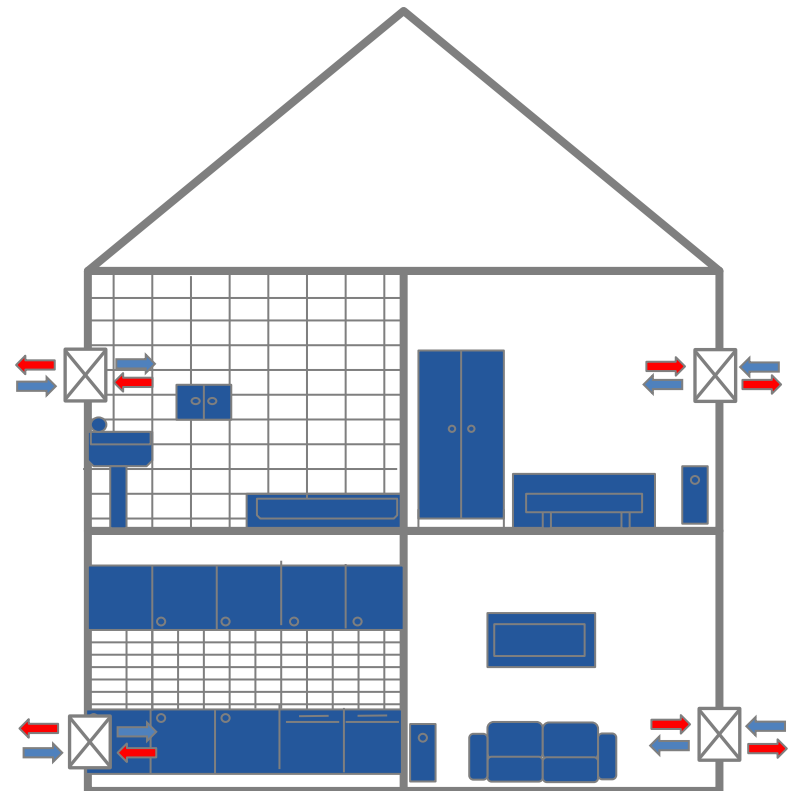
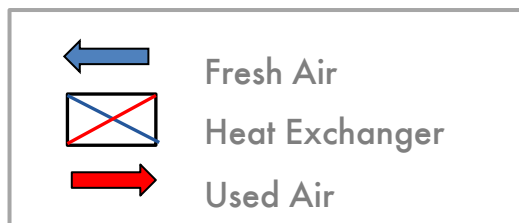
# Air Handling Units with Heat Recovery – Locally Operated

## 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

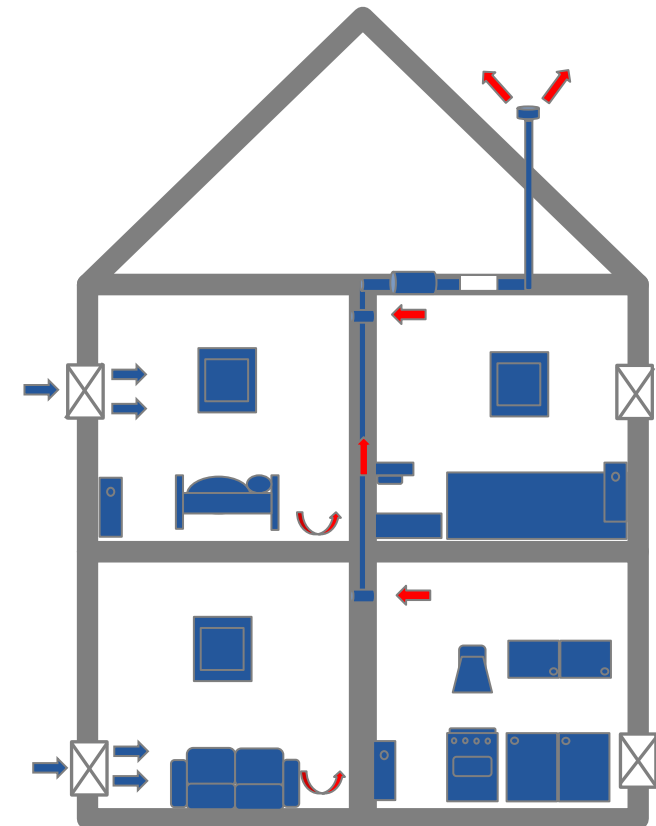
### Local Exhaust

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

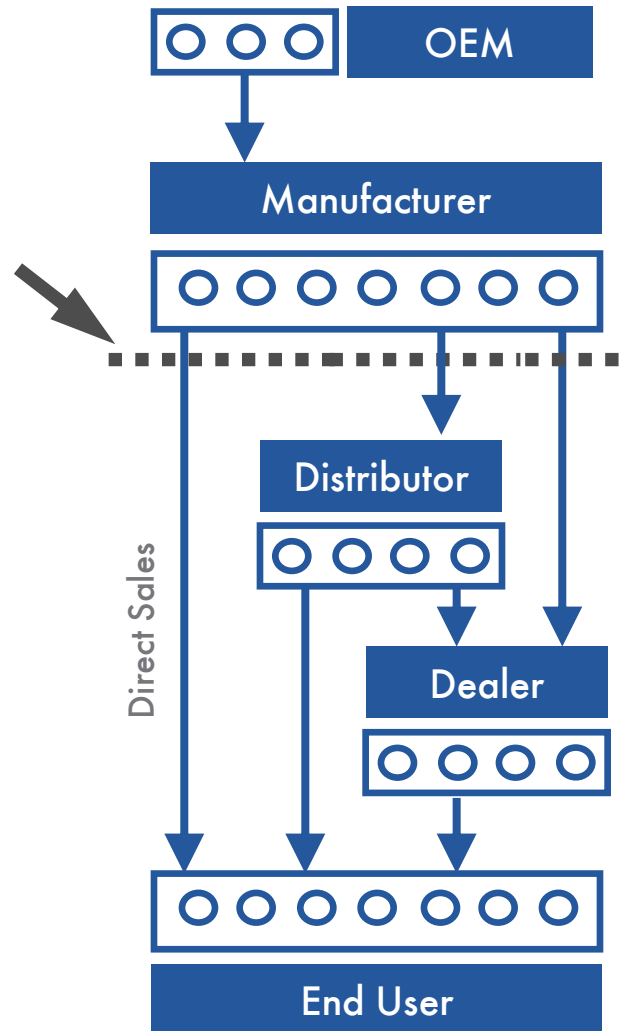




# What Do We Measure in Our Reports?

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.



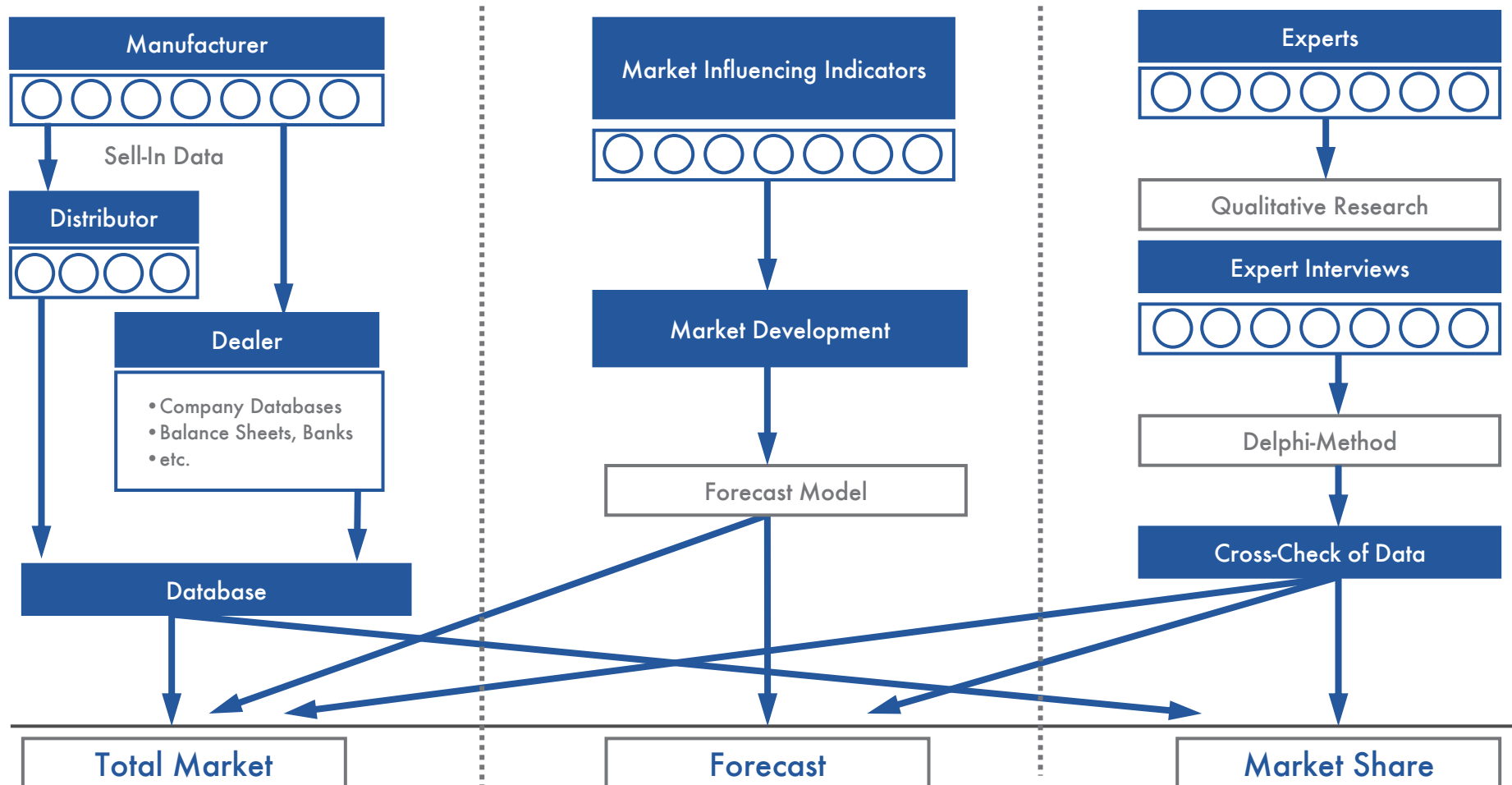
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

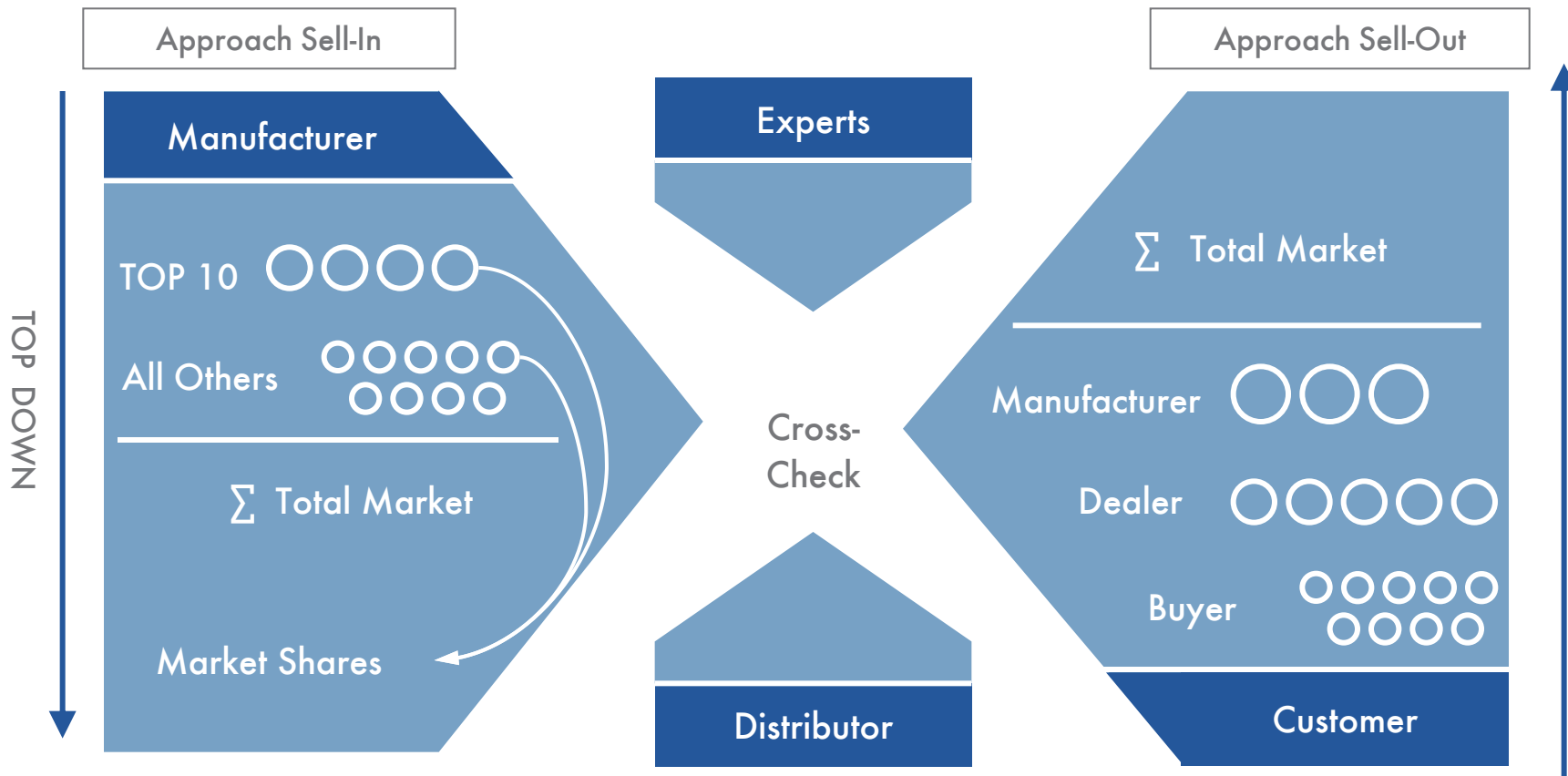
# How Do We Conduct Our Research?

*Description Structure of Survey Methodology*

Methodology

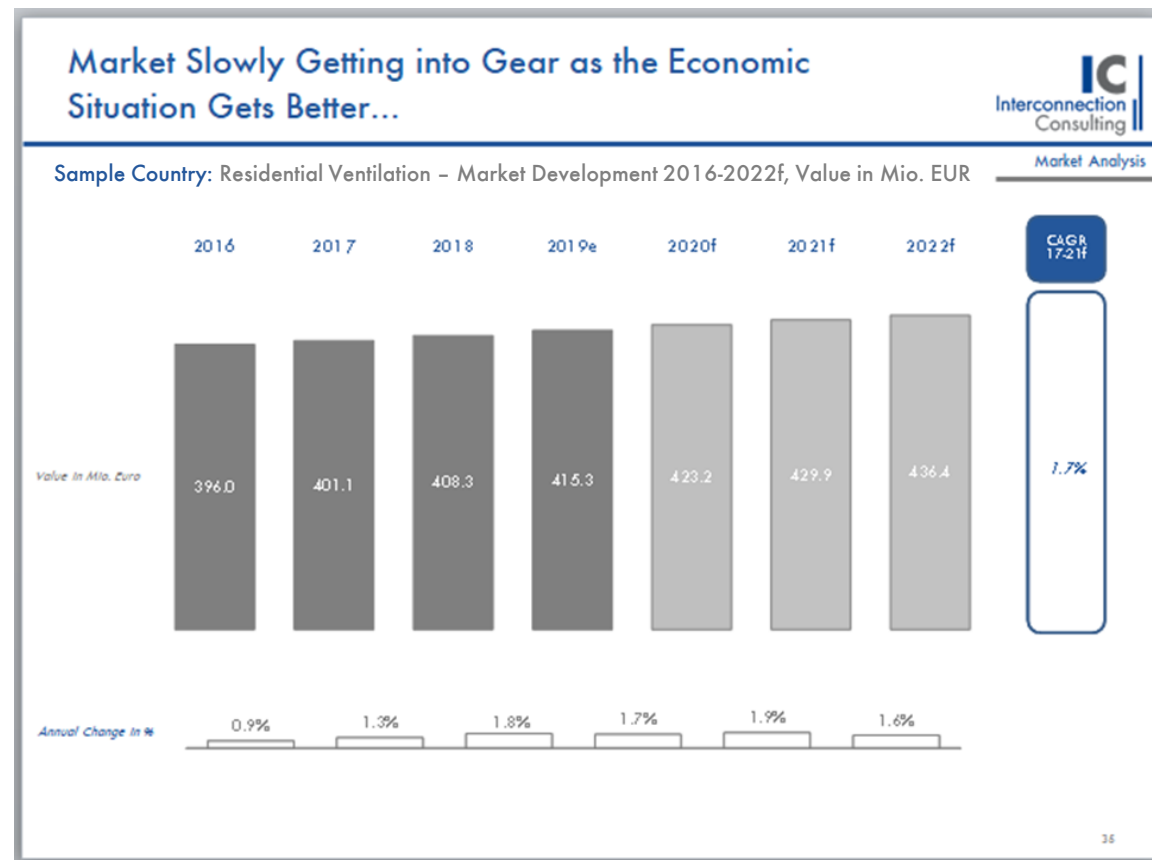


# How Do we Cross Check the Data?



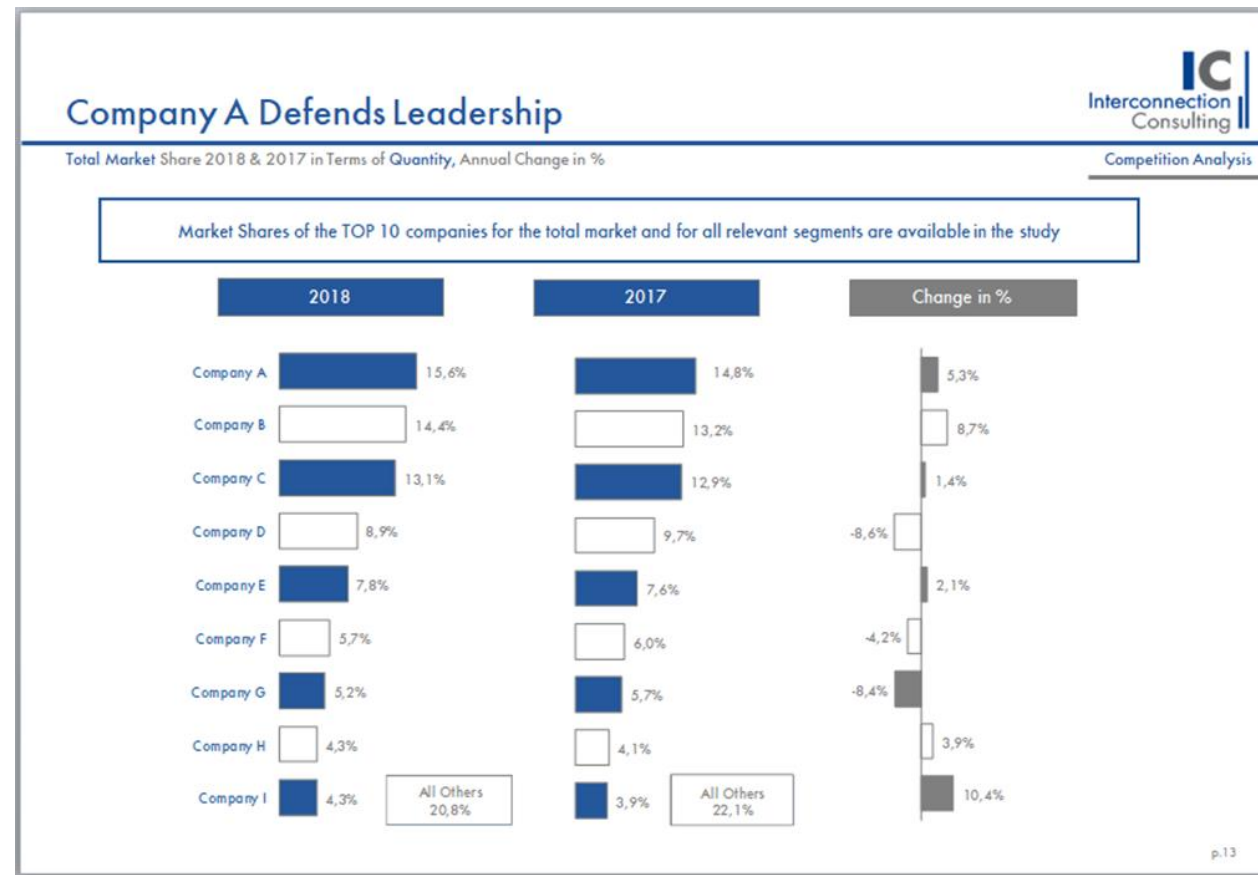
# Scope of Delivery (1.) – Executive Summary as PDF Report

- In the Executive Summary, all essential information of the study is concisely summarized on a few pages
- *This chart shows fictitious numbers*



# ... Including Competition Analysis with Market Shares of Top Players

- Market Shares of the Top 10 Players for the Total Market per country/segment
- *This chart shows fictitious numbers*



## (2.) Scope of Delivery also Includes a Pivot table in MS Excel

- In addition to the visualized report, a pivot table will be delivered.
- With the help of this analysis tool, the study buyer can independently make a selection from the available data and thus compare market developments by year and segment.
- Pivot tables are available for competitor analysis as well as for the overall market and forecasts.

### 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)
Ø 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)
Ø 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

*This chart shows fictitious numbers*

# Scope of Delivery (3.) The IC Cockpit-Solution

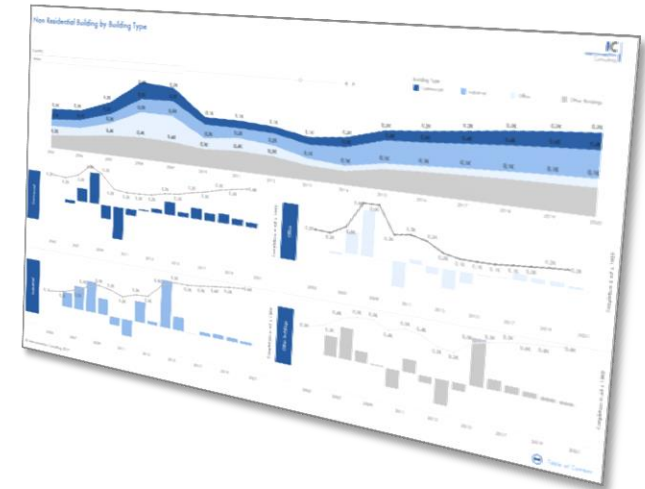
## Interactive Processing of the Data as an Online-Tool

A picture is more than  
1000 words

- Complex relationships are clearly **visualized** in the form of geographic maps, tree maps, stacked bars, etc.

Interactive Dashboards

- Use **interactive dashboards** for the rapid implementation of the data, for potential estimates, for **sales management**, for **measuring success** and **target setting** for your field service team, etc.



Easy Online Access

- Market data is everywhere available, where you have access to internet;
- In addition you can download **pictures**, **CSV-** or export **PDF data**

The cost of the software license is already included when purchasing two or more country reports. If we only refer to one region, we visualize the market report in a PDF document instead of in Tableau;

# With Just a Few Clicks, You Get Exactly the Information You Need at the Moment

## IC Market-Tracking - Residential Ventilation

### Market Analysis

Total Market



Total Market - Map



Product Groups - Overview



Central HRV - Detailed



Local HRV - Detailed



Exhaust Ventilation - Detailed



Business Segment



Building Types



Distribution Channels



### Competition Analysis

Product Groups - Overview



Central HRV



Local HRV



Exhaust Ventilation



Product Groups - IC Dynamic Portfolio



Business Segments / Building Types / Distribution



### Market Environment

General Economy



Financial Indicators



Residential Construction - Overview



Residential Construction - Detailed



This chart shows fictitious numbers

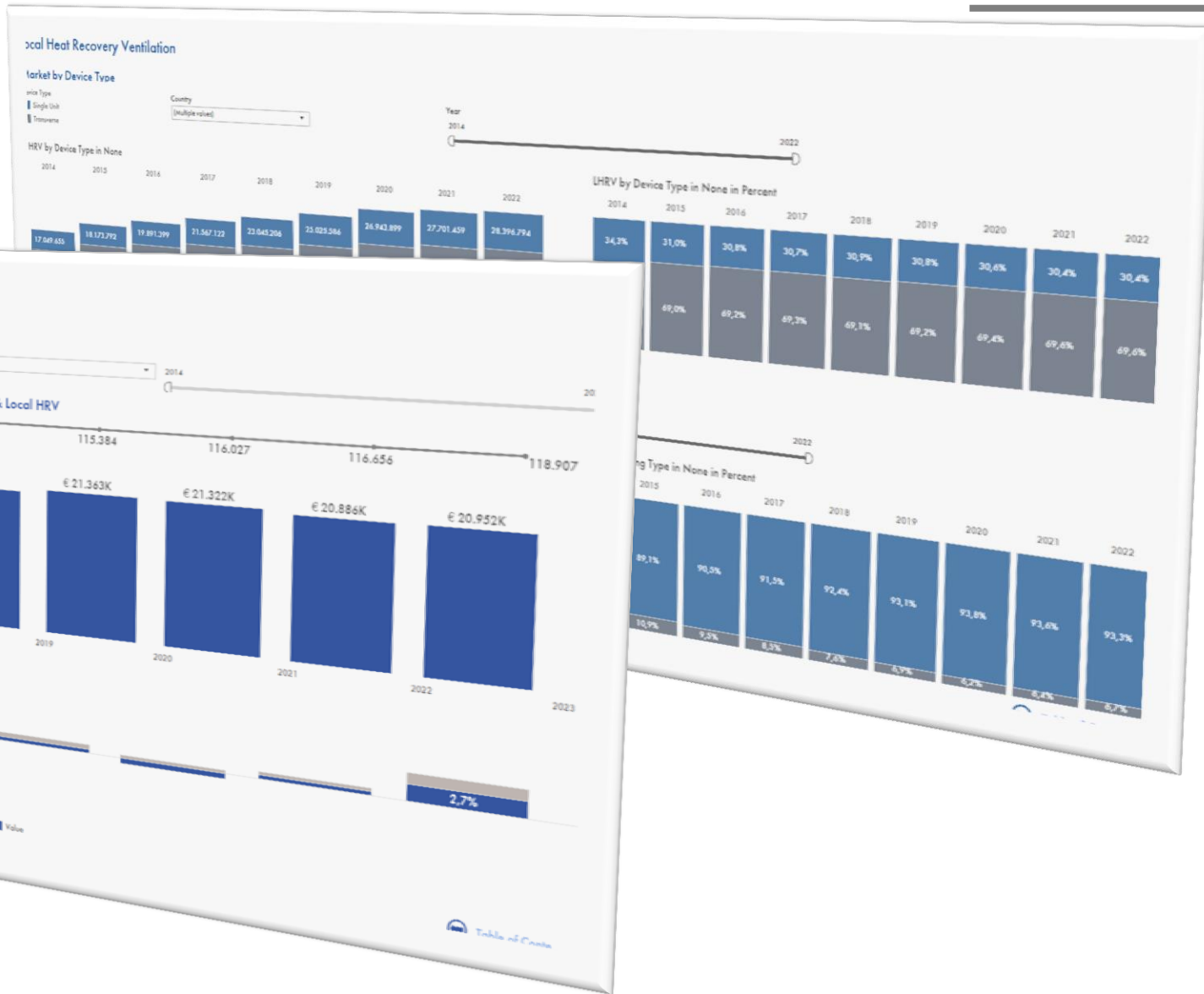


# You Can See at a Glance ...

## ... Which Markets and Product Groups Are Developing Best

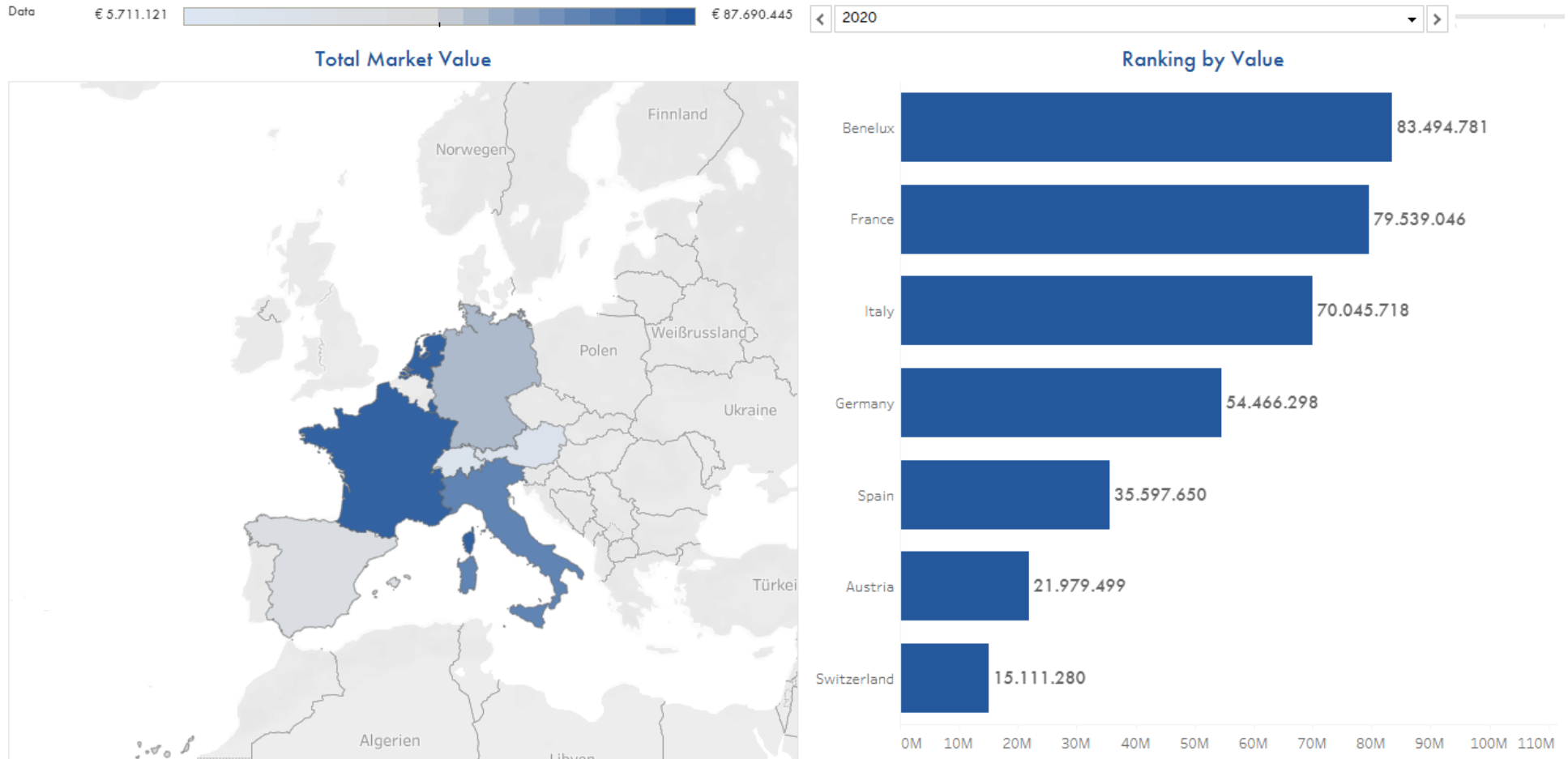


# ... How Big Certain Market Segments and Average Prices Are and How They Develop



This chart shows fictitious numbers

## We also Visually Emphasize the Importance of Different Markets so that even Large Amounts of Data Remain Easy to Understand and Present



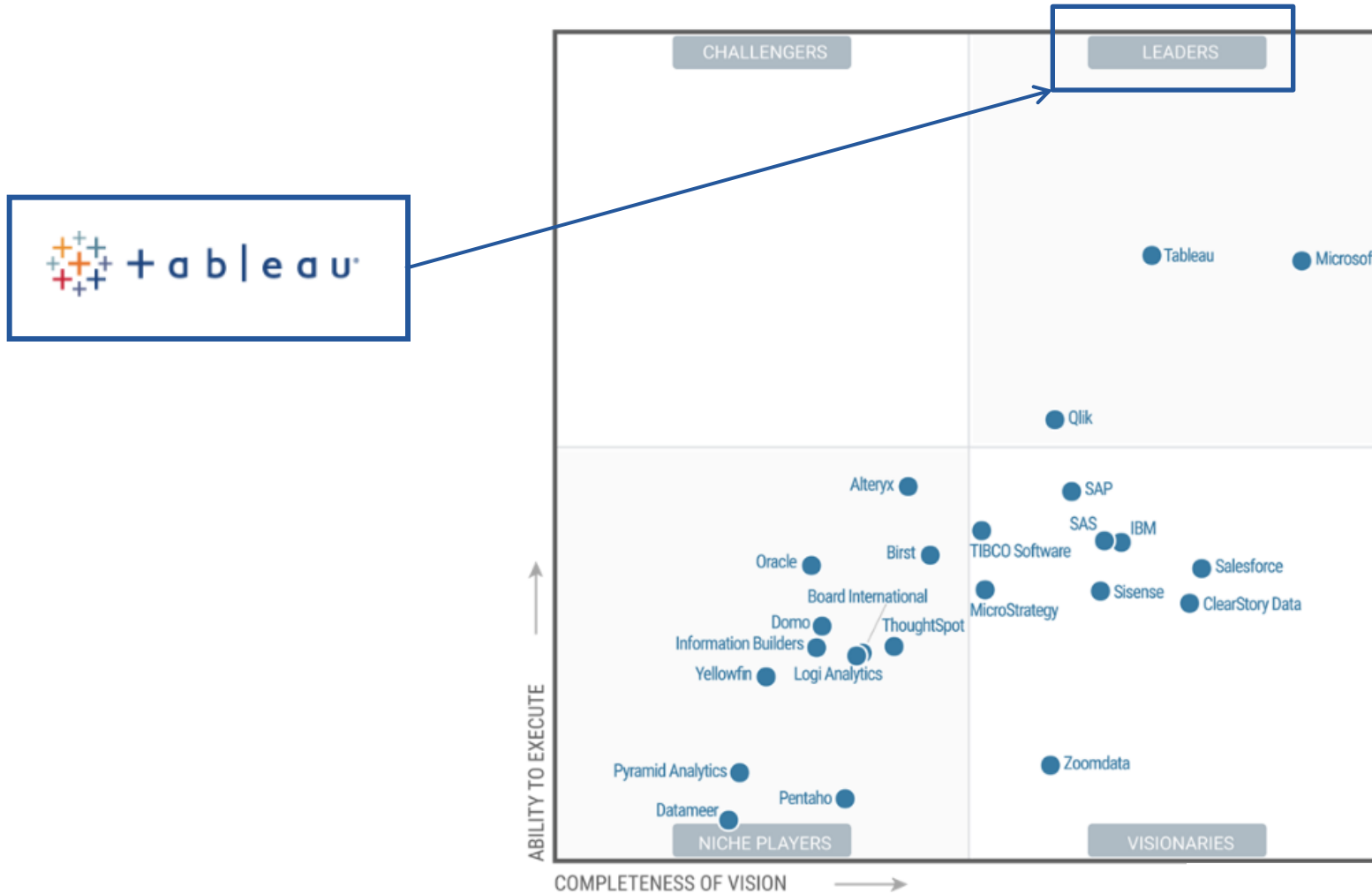
This chart shows fictitious numbers

# We Show Who Is the Most Important Player Overall, as Well as in Different Segments, and Who Wins or Loses Market Share



This chart shows fictitious numbers

# Visualization with the Best Business Intelligence Tool on the Market



Source: Gartner Magic Quadrant for Business Intelligence and Analytics, 2017

Subscription *		Scale of Discounts from a purchasing price of:	
Price per Country	€ 3.950	€ 7.500	-10%
All 9 Countries **	€ 24.885	€ 10.000	-15%
		€ 15.000	-20%
		€ 20.000	-30%

If you are interested to purchase the reports only as a single issue basis, please contact the responsible consultant:  
Andreas Erdresser  
[erdresser@interconnectionconsulting.com](mailto:erdresser@interconnectionconsulting.com)  
Tel.: +43 1 585 46 23 - 31

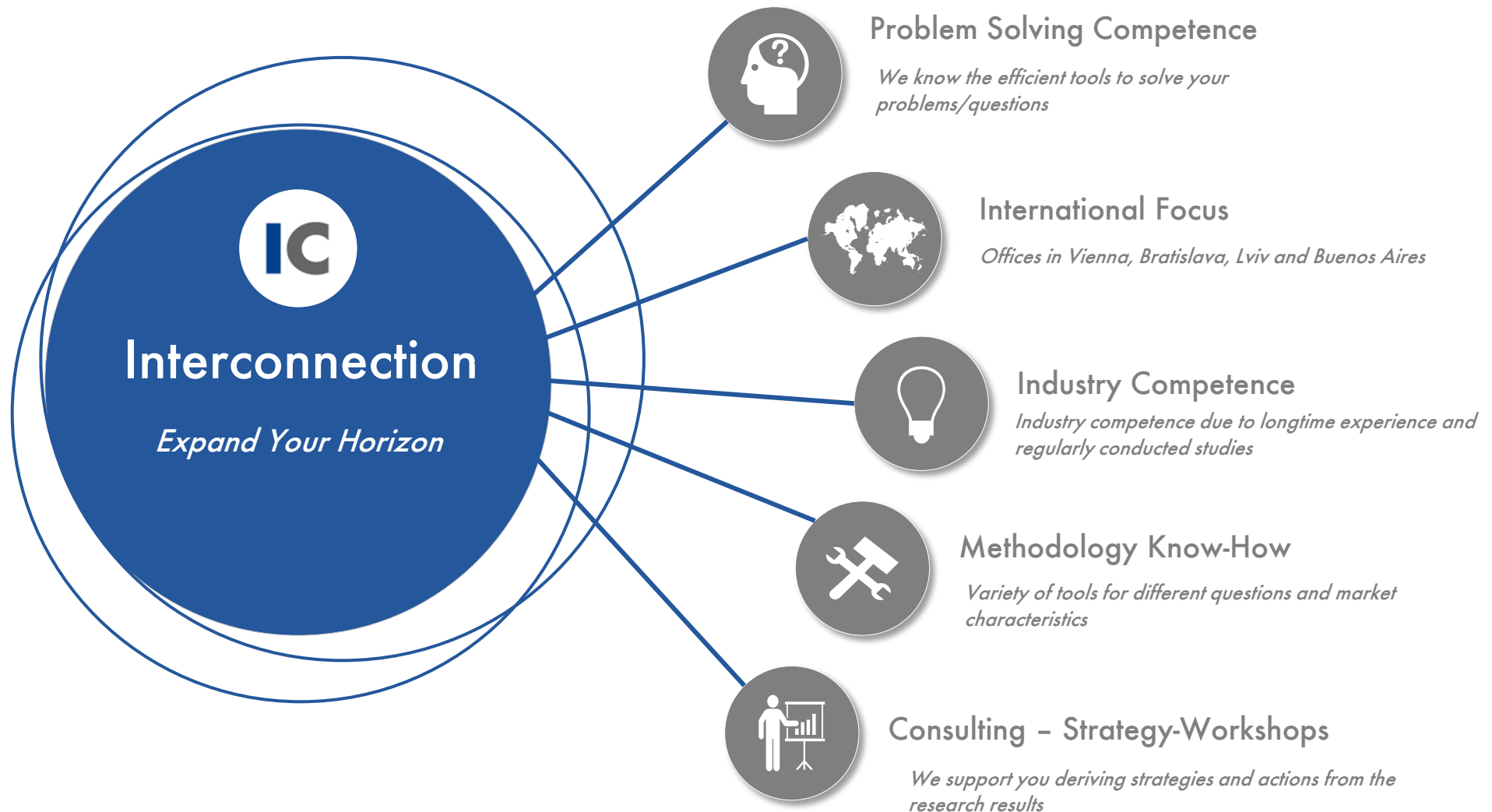
Available Countries	GER	AUT	SUI	FRA	GBR
	NORDICS	ITA	BNX	POL	

\* **IC Subscription:** Unit price if the study is obtained at least twice (order year and subsequent year). 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. Interconnection Consulting will announce price changes no later than 6 weeks before the end of the year. In the event of non-termination, the annual subscription is always extended by another year.

\*\* Price Special taking into account already scale of discounts.

Price includes access to the online cockpit solution with all data from the study. From the purchase of at least two countries, the license costs are included. When purchasing only a single region, the data is visualized as a PDF document;

# Interconnection Provides Data for Corporate Decisions



Our market intelligence team has the necessary methodological know-how and tools for the following questions:

- What does the consumer in the area of home ventilation like to pay more for?
- In which segments is there potential?
- How do I optimize my distribution strategy?
- Neuro-Marketing: How successful is my advertising and website?





# Our Market-Intelligence Tools



*„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!

**Interconnection Consulting**

Getreidemarkt 1, A-1060 Wien

Mag. Andreas Erdpresser – Senior Consultant

Tel: +43 1 5854623 -31

Fax: +43 1 5854623 -30

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we show you the way

**Yes, we would like to order the  
IC Market-Tracking® Residential Ventilation in Europe 2020**

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

Please choose from the available countries

- |                                      |                                  |                                  |
|--------------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> Austria     | <input type="checkbox"/> Italy   | <input type="checkbox"/> Nordics |
| <input type="checkbox"/> Germany     | <input type="checkbox"/> France  | <input type="checkbox"/> UK      |
| <input type="checkbox"/> Switzerland | <input type="checkbox"/> Benelux | <input type="checkbox"/> Poland  |

- ☐ Subscription\* Single Country Report / Price per Year.....EUR 3,950.- / Country
- ☐ Subscription\* Package – All Country Reports / Price per Year *(scale of discounts considered)*.....EUR 24,885.- / Country

	Single Issue	Subscription*
20% 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		✓

In case of interest for a single issue of the report, please contact the responsible consultant:  
Andreas Erdpresser – erdpresser@interconnectionconsulting.com – Tel.: +43 1 585 46 23 - 31

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(please fill in the data completely)

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VAT identification number: \_\_\_\_\_

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(necessary if different from the billing address )

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Post Code/Zip: \_\_\_\_\_

Country: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Date

Name

Signature

**\*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.

**Terms of Payment**

Payable after receipt of invoice without discount or via Credit Card. General terms of business apply, as agreed; any disputes arising will be settled before a competent Vienna court of law. We claim copyright protection for the work. Distribution to third parties, duplication, publication or revision, even in part, is not permitted. In case of violation the company or persons placing the order agree to pay a contract penalty of one hundred thousand Euros in each case. All prices shown exclude sales tax. Interconnection reserves the right to use the clients logo as reference until revocation.

**Scale of discounts**

from 7,500.- EUR	10%
from 10,000.- EUR	15%
from 15,000.- EUR	20%
from 20,000.- EUR	30%