



IC Market-Tracking

Heat Pumps
in Europe Top 5
2019

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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.
- ✓ 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 (Ground Source, Air-Water and Water-Water Heat Pumps)
 - Customer Segment (residential, non-residential)
 - Business Segment (1st-time Installation, replacement installation)
 - Distribution Channels (Direct, Indirect)
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.



Product Groups

Ground Source

Central heating and/or cooling system that pumps heat to or from the ground. It uses the earth as a heat source or a heat sink.

Vertical Bore Hole

Boreholes are drilled to a pre-determined depth (Geothermal boreholes are typically 50 to 100 meters deep and approximately 150mm in diameter) and a pipe is installed into the borehole, normally being either 32mm or 40mm pipe. The pipe is a loop that is connected at both ends to a manifold that in turn connects to the heat pump.

Horizontal Earth Collectors

The pipework is buried at a depth of approximately 1.2m and spaced 0.75m apart. The collector fluid then transfers this energy to the refrigerant in the heat pump's evaporator heat exchanger.

Energy Fence

The Energy Fence works like a solar collector. It absorbs the energy of the sun and feeds it to a brine water heat pump. A ground collector stores the solar energy. The heat pump gains brine from the ground collector at a high, above-average temperature. It then converts the warm brine into heat for the home's heating and hot water systems.

Product Groups

Air-Water Heat Pump

An air-water heat pump transfers heat by absorbing heat from outside air and releases it inside the building for domestic hot water supply with the use of heat exchangers.

Split vs. Monobloc

A split system has two sections. The indoor 'boiler' section contains the water, heat exchanger, pump and controls, while the outdoor unit contains most of the mechanical parts that collect the heat and transfer it to the indoor unit.

A Monobloc system has all of the components of a split system but contained in one box outdoors without the requirement for on site refrigeration pipe work. It has a remote controller mounted inside the building.

Indoor vs. Externally Mounted

Heat Pumps can be installed externally in the garden or other house surroundings or in an indoor provided space.

Water - Water Heat Pump

Heat is transferred by absorbing heat from a water source and releases it inside the building for domestic hot water supply with the use of heat exchangers.

Surface Water Source

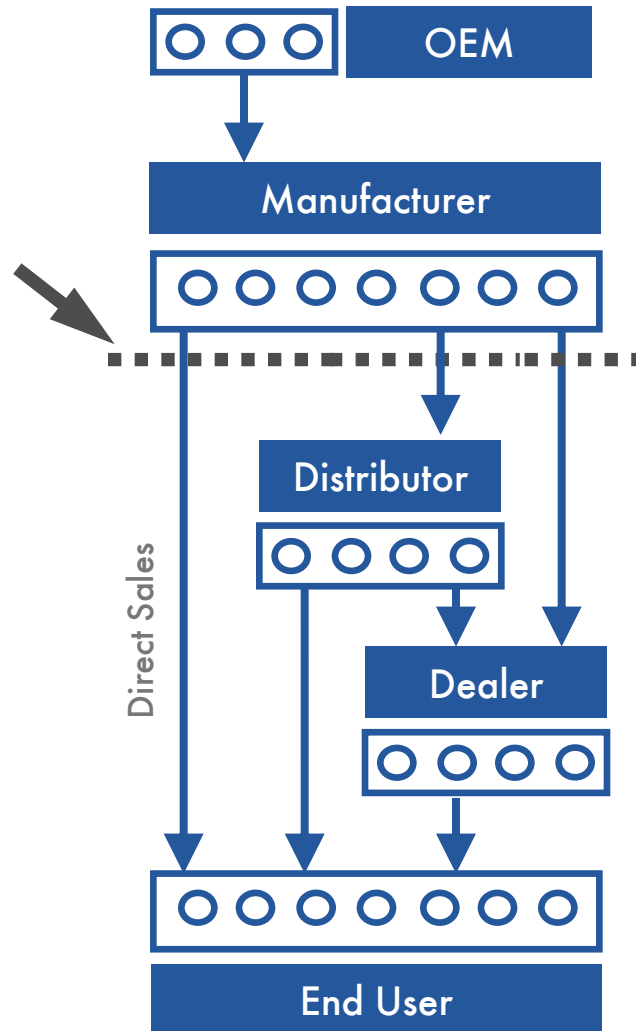
Surface water heat pumps transfer heat to or from a surface water body and use it for heating or cooling buildings using open and closed loop systems.

Ground Water Source

A version of geothermal heat pump using ground water as a heat source.

Analysis of Sell-In Data based in Primary Survey with Manufacturer

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

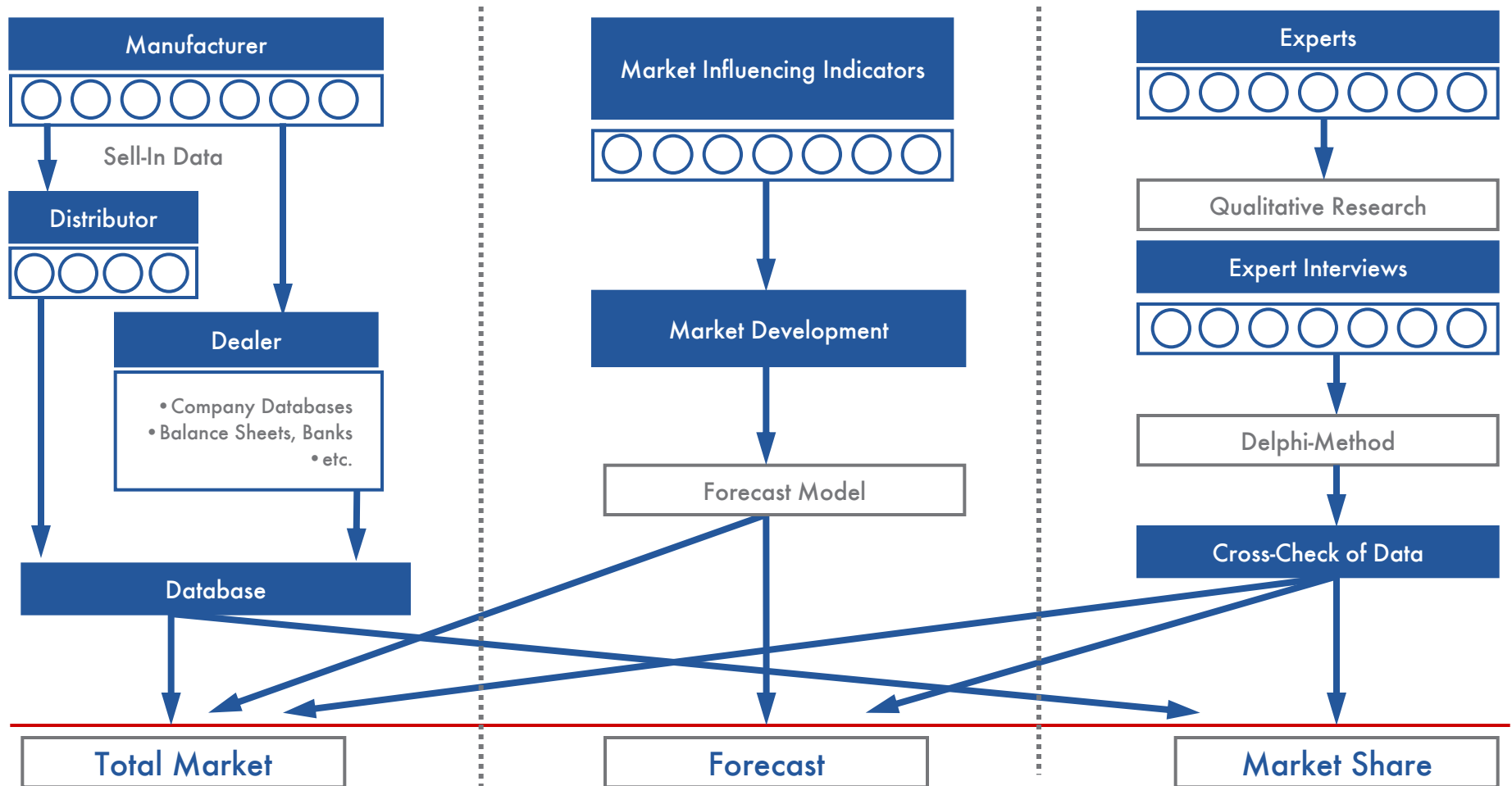


Sales are segmented by the first distribution partner.

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.

Three Approaches to Collect and Analyze Data



Content of the Report

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 analysed 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.

IC Cockpit-Solution

Online Tool with Interactive Dashboards Presenting the Data

A picture says more
than 1000 words

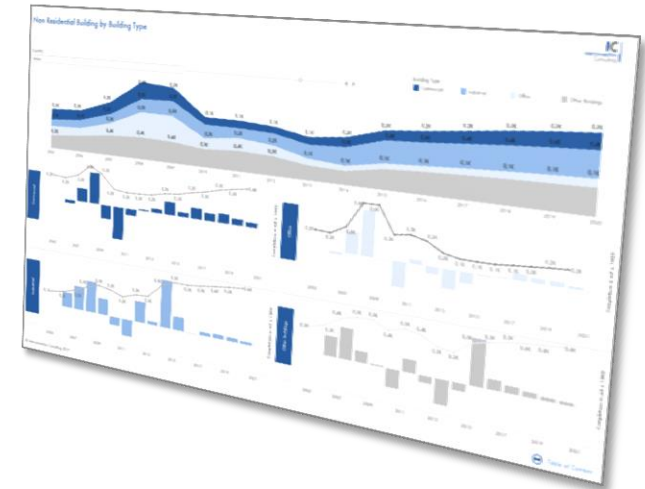
- Complex correlations are **visualized** in the form of geo-, tree maps, bars etc.

Interaktive Dashboards

- Use interactive dashboards for **quick implementation** of the data, for potential estimations, for sales control, for success measurement etc.

Einfache Online
Zugänglichkeit

- Market data are available wherever you have internet access
- You can also export the data as **.jpg, .csv or .pdf** file



Software license costs are EUR 600,- in case of purchase of one country report. Software license costs are included when more than one country report are purchased.

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Our Market-Intelligence Tools



"IC is a permanent partner of ours and provides helpful data for decisions."

Herr Bernd Blümmers
General Manager, Saint-Gobain Solar Systems Central Europe



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

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