



IC Market Forecast® Mattresses in Europe 2020

- Germany
- Austria
- Switzerland
- United Kingdom
- France
- Poland

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
 - Mattress Sizes
 - Mattress Types
 - Customer Segments
 - Distribution Channels
- Forecasts from 2020 – 2023 for the total market as well as each analyzed product group and segment
- Annually updates of the data

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.
- Continuous updates of the data



Market 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

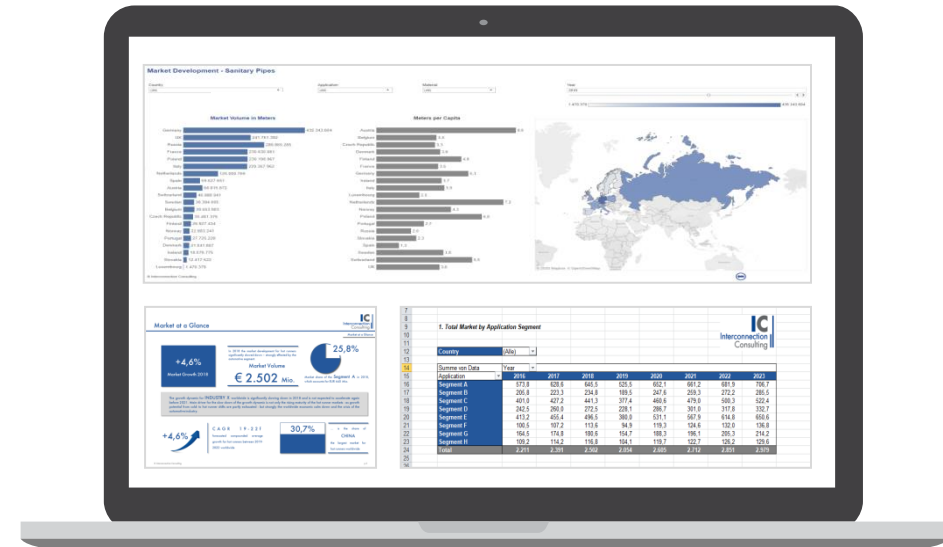
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of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



Market Intelligence Tool and Reports



Online Dashboards

Executive Reports

Pivot Tables

Available Countries

Germany

Austria

Switzerland

France

United Kingdom

Poland

Market
by

Product Groups

Spring

Foam

Latex

Others

Mattress Sizes

Small or Kids

80 x 180/220 cm

90/100 x 180/220 cm

110/140 x 180/220 cm

150/180 x 180/220 cm

Large & Untypical Sizes

Distribution Channel

Stores

Online Sales

Others

Mattress Types

Orthopedical/Medical Mattresses

Other Mattresses

Customer Segments

Residential/B2C

Hotels/B2B

Others/B2B

For each segment the forecasts for the next three years are available in the study.

Market Structure - Interpretation

Available Countries

- Germany
- Austria
- Switzerland
- France
- United Kingdom
- Poland



Product Groups
Spring
Foam
Latex
Others

Mattress Sizes
Small or Kids
80 x 180/220 cm
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Large & Untypical Sizes

Distribution Channel
Stores
Online Sales
Others

Mattress Types
Orthopedical/Medical Mattresses
Other Mattresses

Customer Segments
Residential/B2C
Hotels/B2B
Others/B2B

- Market data is available for each country separately as well as aggregated for the country package purchased.
- Each country report includes data for product groups, mattress sizes, mattress types, customer segments and distribution channels separately as well as aggregated for the total market of mattresses in terms of value and quantity.

Product Groups

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

Spring



Mattress made out of steel coil springs that support the sleeper's body. It includes Bonnell spring and pocket spring mattresses.

Foam

Mattress made out of viscoelastic memory foam and any other kind of foam.



Latex



Mattress made out of an inner latex foam structure. The material could be either natural or synthetic latex.

Others

Mattresses that use different elements such as cotton or coco nut material filling or any alternative material. It also includes pillow top mattress, gel memory foam, air-water mattresses.

Mattress Sizes

Small or Kids

Small / kid size bed, up to 70 x 140 cm.

80 x 180 / 220 cm

Bed size included between 80 x 200 to 80 x 220. It also implies 80 x 180 -190 - 210.

90 / 100 x 180 / 220 cm

Bed size included between 100 x 200 to 100 x 220. It also implies 90 to 100 x 180 -190 – 200 - 210 – 220.

110 / 140 x 180 / 220 cm

Bed size included between 140 x 200 to 140 x 220. It also implies 110 to 140 x 180 -190 – 200 - 210 – 220.

150 / 180 x 180 / 220 cm

Bed size included between 180 x 200 to 180 x 220. It also implies 150 to 180 x 180 -190 – 200 - 210 – 220.

Large & Untypical Sizes

Bed sizes larger than all the previous categories or out of the standards.

Mattress Types

Orthopedical/Medical Mattresses

Orthopedical and Medical Mattresses, which specialised for customers with back problems. Such a technology could be foam mattresses with several firmness levels, memory foam and pocket spring mattresses which are designed to support the different body parts in a healthy way. However, it is only considered to be in this category if the manufacturer calls it an orthopedical /medical or ergonomical mattress.

Other Mattresses

Any other mattress type

Customer Segments

Residential/B2C

Private use for households

Hotel Industry/B2B

Hotels, hostels and similar

Others/B2B

Other commercial use, for example, elderly houses, student dorms and any other customers which do not fulfill the definition of a "residential" or "hotel" customer



Distribution Channels

Stores

Stores whose product range includes all kinds of home equipment and where a substantial part from the business comes from the sale of home equipment.

Stores whose product range includes all kinds of products in different departments, sizes can be around 10.000m²- 125.000m²

Retail establishments specialized in selling Mattresses as well as sheets, linens and all kind of bed accessories

Online Sales

Sales to customers via online shops. It includes businesses which sell only mattresses and complementary products but also e.g. manufacturers which sell through their online shop.

Sales to customers via online retailers. Can be retailers with a very wide products (including electronic products and similar) or with a more narrow product range but with many different brands

Others

Other distribution channels can include sales on street markets, through teleshopping channels, door to door sales conducted directly by a company or a hired sales agent, telephone sales or at the manufacturers 'premises, outsourced call centers and similar. In this category all the distribution channels which cannot be assigned to any other channel in the above mentioned categories will be counted.



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 Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer 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

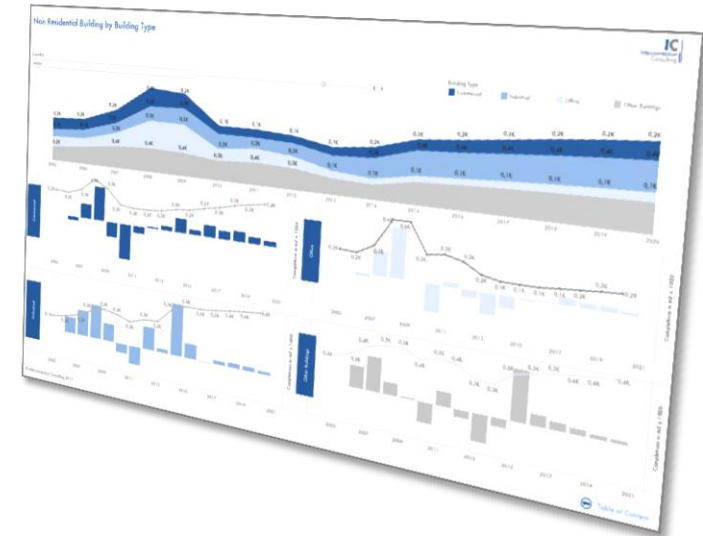
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

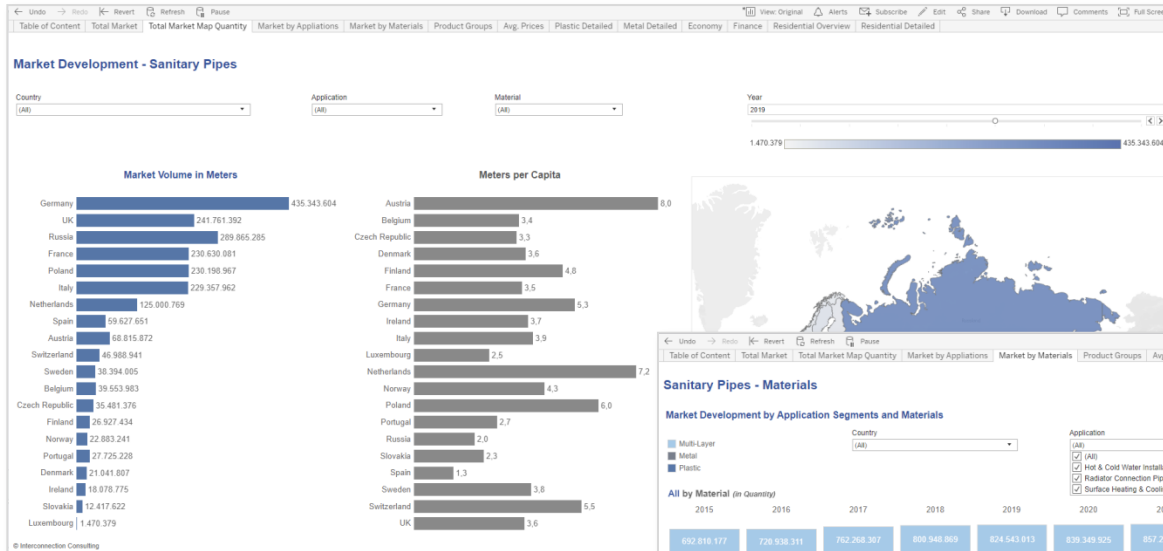
- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online
accessability

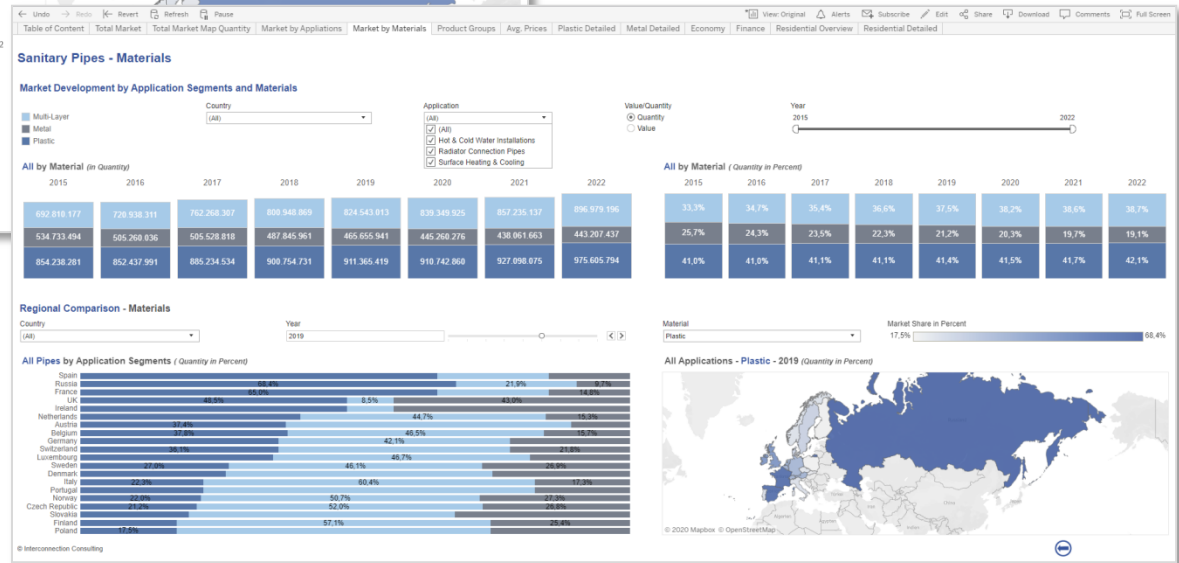
- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file



Sample Cockpits for Market Analysis Data

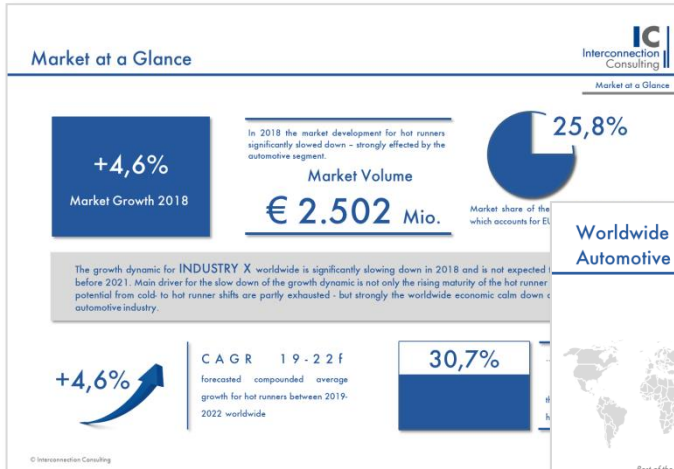


This chart contains fictive data

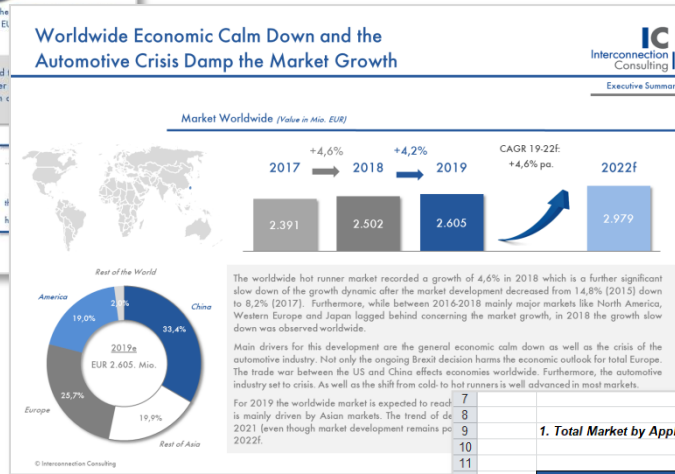


Additional Deliverables

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

IC Market Forecast® Mattresses in Europe 2020

Prices & Conditions

	Subscription*	Single Issue	
Single Country	€ 2.500,-	+25% for Single Issues	
All Countries**	€ 8.499,-		
Available Countries	Austria Germany	France Switzerland	Poland UK



* **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.

** Price taking into account the scale of discount. All prices shown exclude sales tax.

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.

Chosen References

pwc


SAINT-GOBAIN

SCHÜCO


TEMPUR
PRESSURE RELIEVING MATTRESSES AND PILLOWS

**WINK
HAUS**


sembella

USM
Möbelbausysteme

STRABAG

auping

FLEXMATTRESS

BCG

Interconnection Provides Data for Corporate Decisions



Our Market-Intelligence Tools



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

Interconnection Consulting

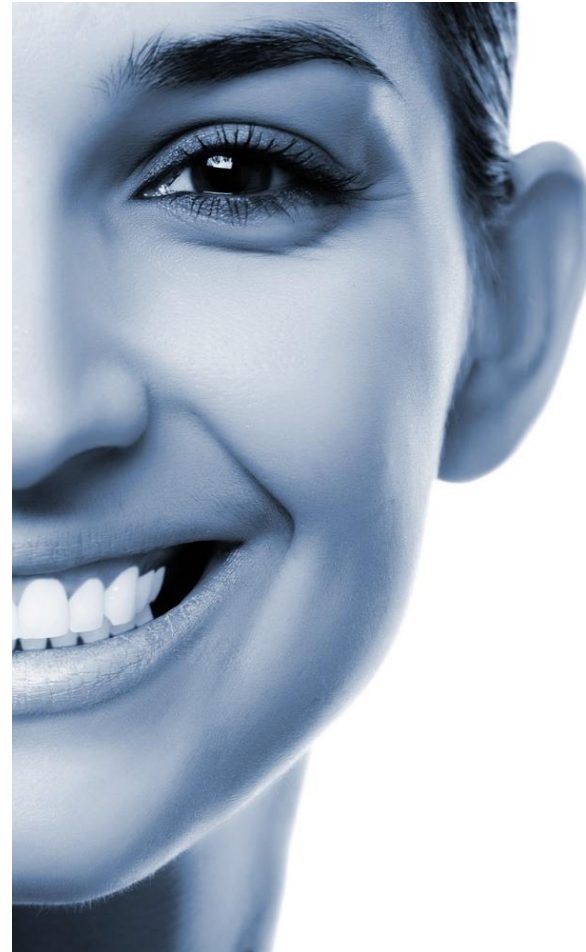
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Yes, we would like to order the IC Market Forecast® Mattresses in Europe 2020

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

Please choose from the available countries

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

Single Issue (+25%)

- Single Country EUR 2.500.-
- All countries EUR 8.499.-

	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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Country: _____

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Date	Name	Signature
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