

IC Market Tracking Windows in Europe 2018

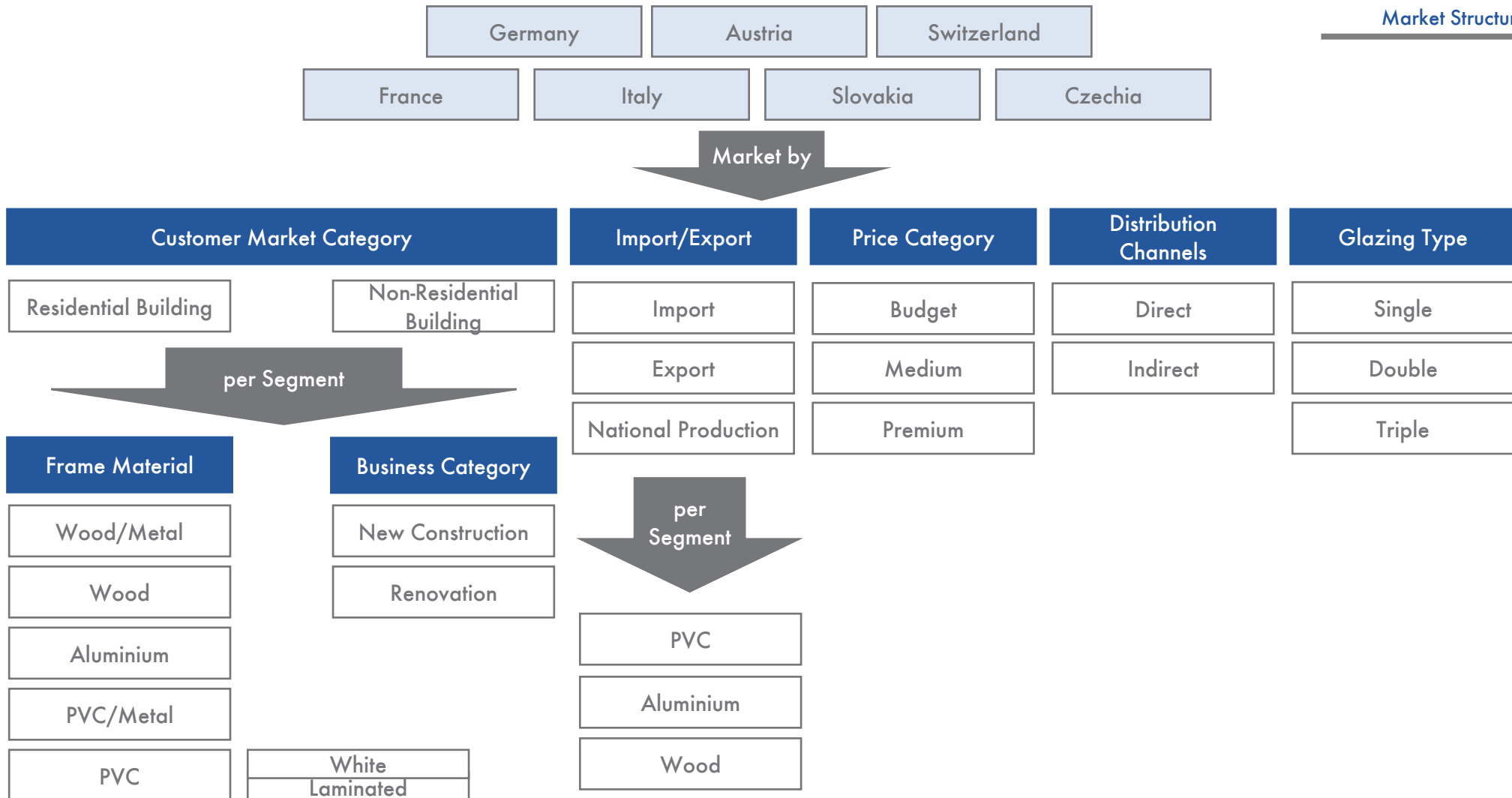
- Germany
- Austria
- Switzerland
- Italy
- France
- Slovakia
- Czechia

Your Benefits at a Glance

- ✓ You will receive an overview of the **overall market** in addition to **individual market segments**.
- ✓ A detailed **representation of the key markets by country and forecasting until 2021** based off of our econometric forecast model.
- ✓ **A competitive analysis with the provider market shares** and examination of the development during previous years in terms of:
 - The overall market und individual segment market according to
 - Structure Material
 - Business and customer market categories
 - Distribution channels and
 - Price categories.
- ✓ **Additionally you will receive information pertaining to:**
 - Opening varieties
 - Glazing varieties and
 - Import/export data.
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.



Windows in Europe 2018



Every market segment contains an overall market analysis of the previous two years as well as a forecast for the next 3 years.

Price Categories

Budget

Window prices up to 200 € ex works; measured in terms of quantity, without transportation and installation

Medium

Window prices from 200 - 400 € ex works; measured in terms of quantity, without transportation and installation

Premium

Window prices from 400 € ex works; measured in terms of quantity, without transportation and installation

Distribution Channels

Indirect

Wholesale trade, retail trade and all other forms of trade in which goods are purchased and sold by a third party

Direct

Direct sales to the end user, also by own sales rep.; Others: Internet, etc.

Customer Segments

Residential

Residential Construction including 1-family, 2- family dwellings and flats

Non-Residential

Non-Residential buildings such as buildings for education, health, industry, storage, office, commercial, agricultural and other purposes.

Value

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

Quantity

As there is no broadly accepted European Standard, turnover in quantity has been expressed in the German standard, defining one window unit as a statistical window with the size of $1,3 * 1,3 \text{ m} = 1,69 \text{ sq.m.}$ In some regions, companies are not prepared to quantify their window output in terms of size at all (often window output is quantified in weight), which means transformation into window units sometimes proves difficult. We try our best to provide reliable figures, nevertheless for some countries, the turnover expressed in value may provide a more relevant estimate of the sales volume than the turnover expressed in quantity.

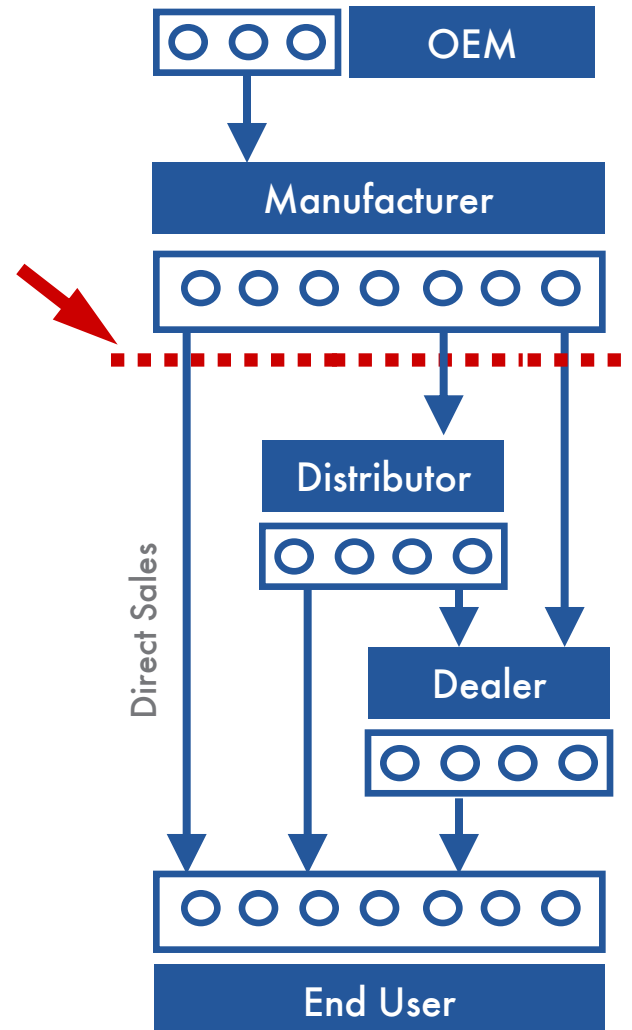
Not included: Exports, roof windows, glazed facades, conservatories



Our Method of Measuring Sales

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.



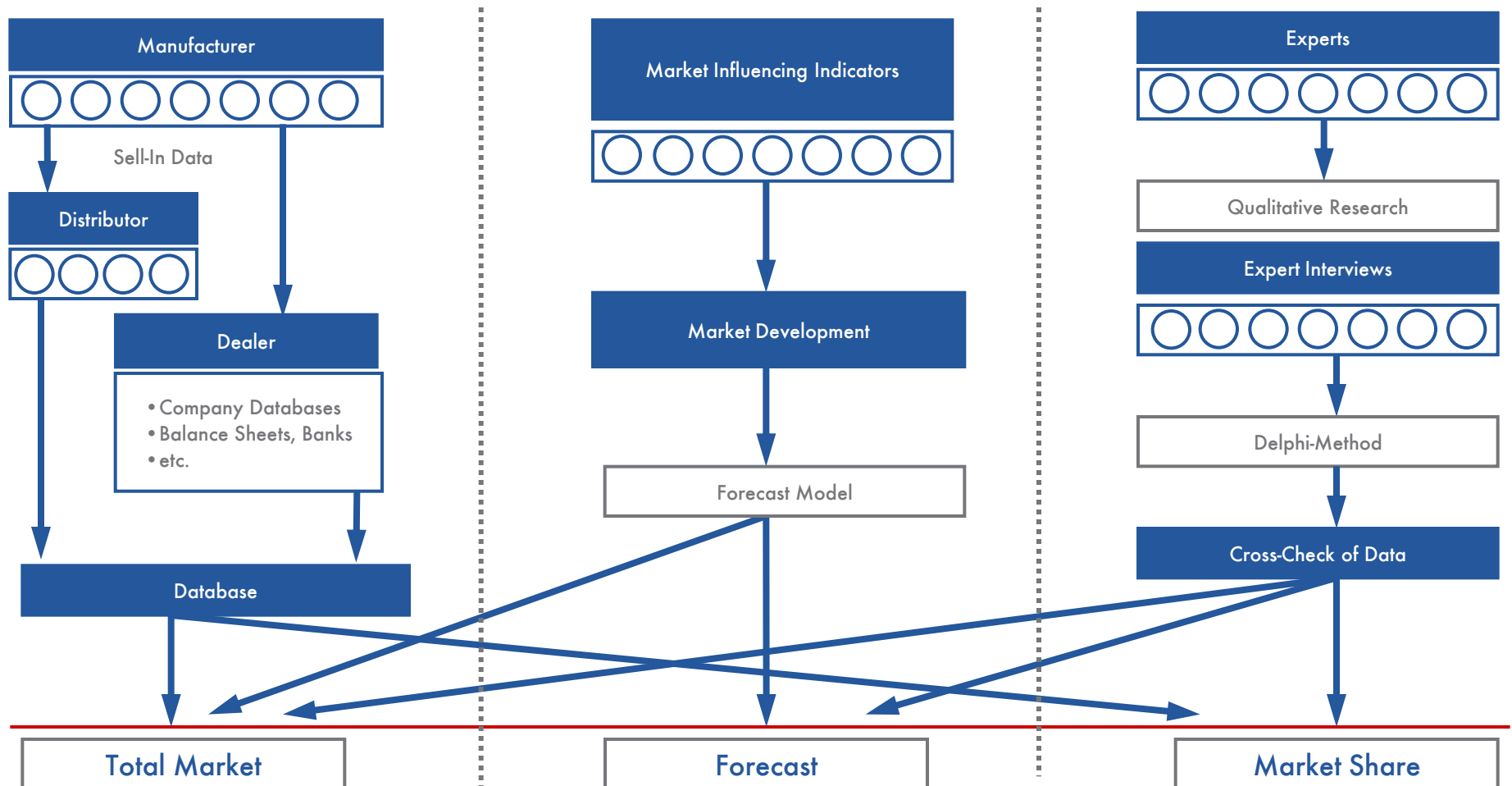
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

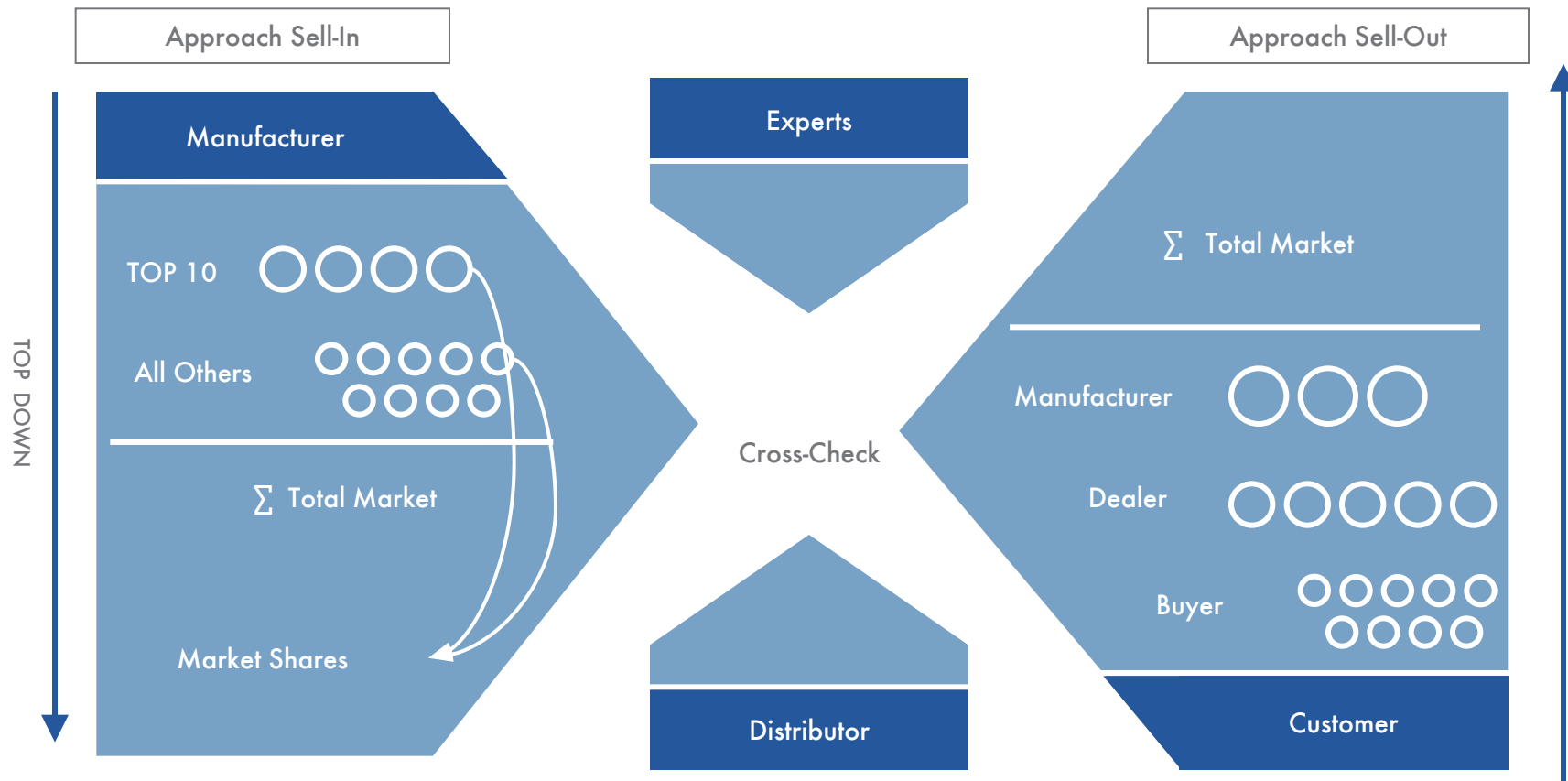
Methodology



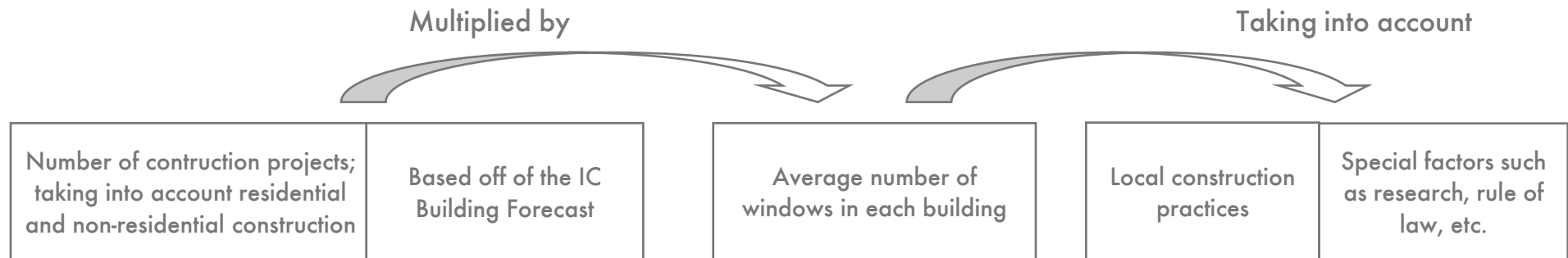
Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

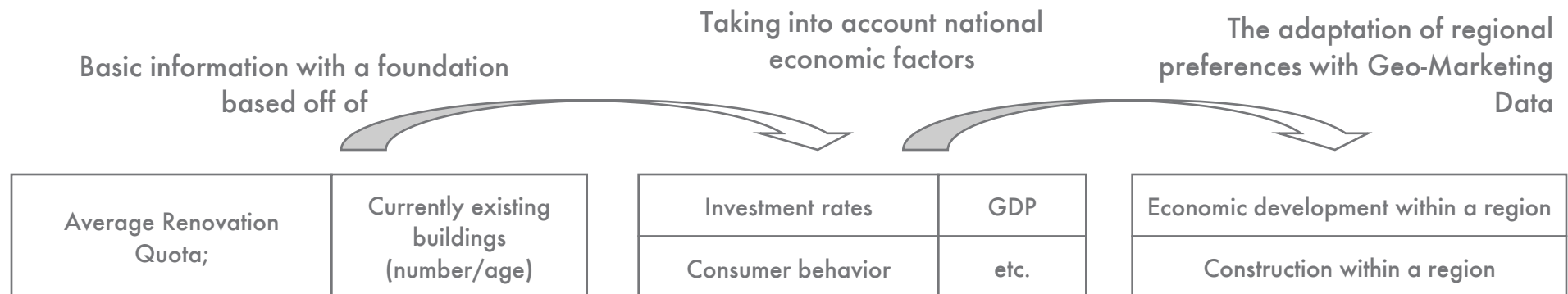
Methodology



Window Market on New Construction Sites



Window Market in Renovated Structures



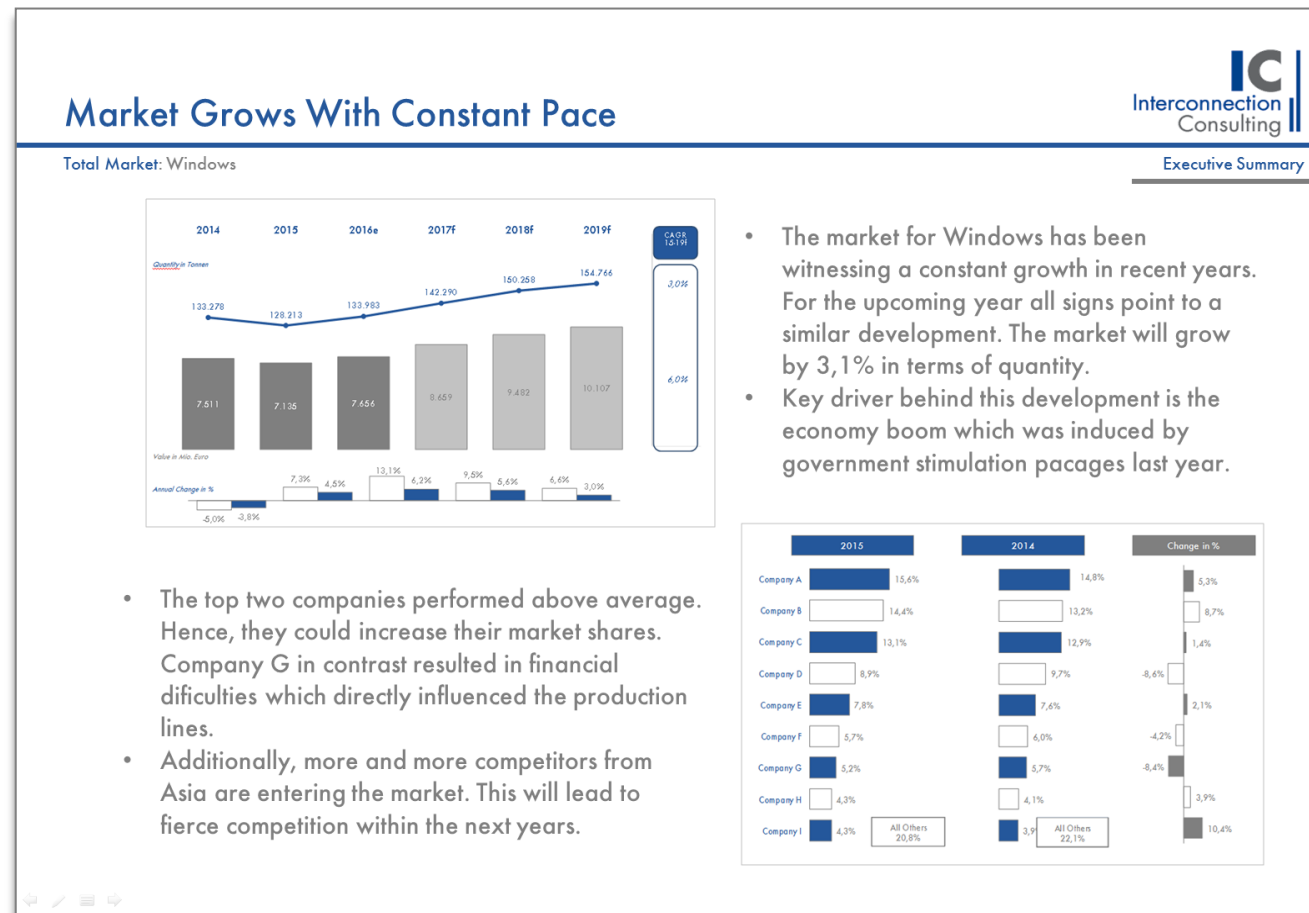
Every IC Market Tracking® is built up of modules and consists of the following sections:

Content

- The **Introduction** shows the definition and demarcation of product groups and regions as well as an insight into our methodology and a characterization of the study's objectives.
- 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 analyzed 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 comparing market shares in different categories, changes in market position, benchmarks, average prices, etc.
- Finally, all data are documented in the table section – also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

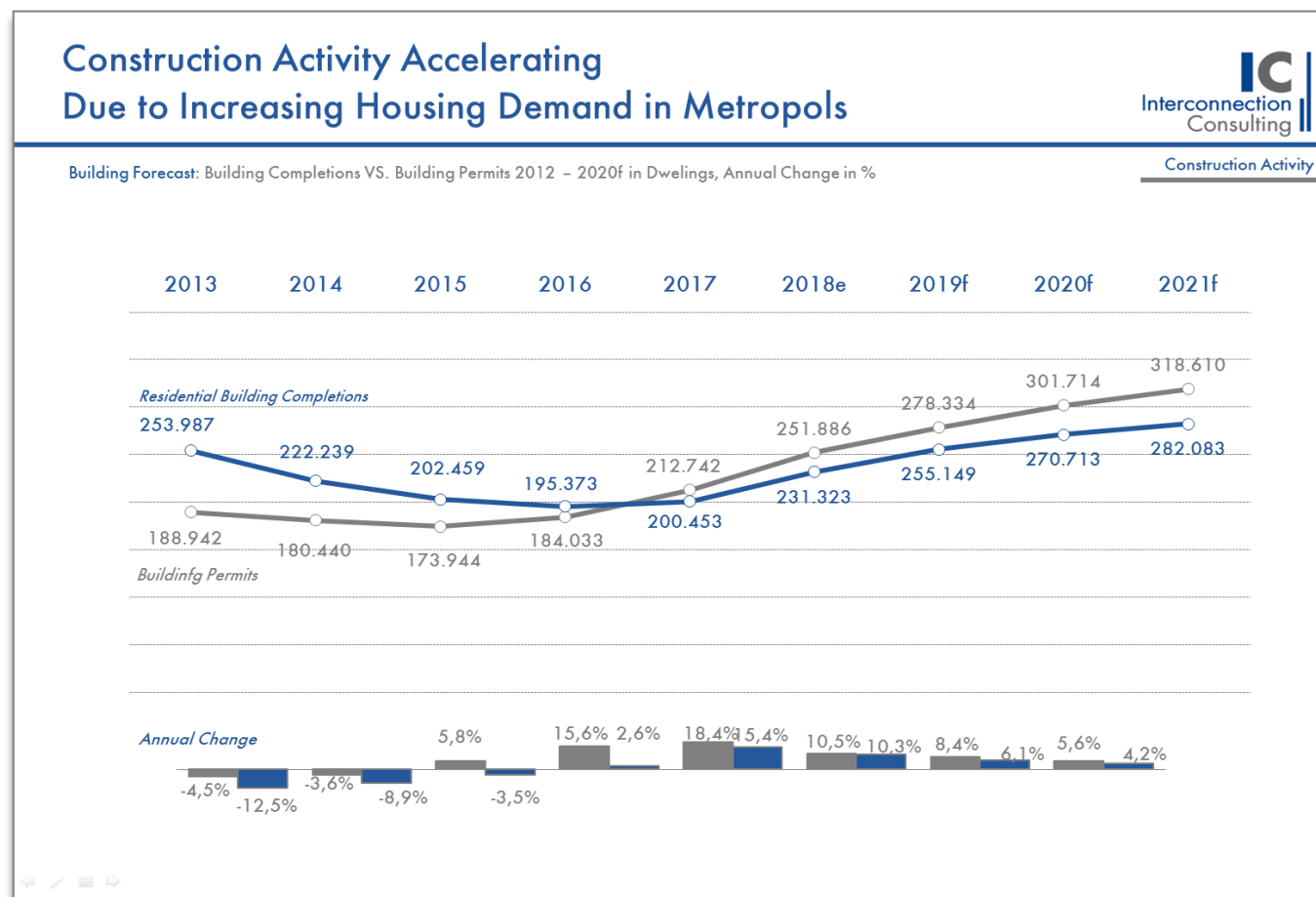
Executive Summary at the Beginning of the Report

- *The executive summary comprises all relevant information of the report in precise manner. Forecast and competition situation is highlighted*
- *This chart shows dummy figures*



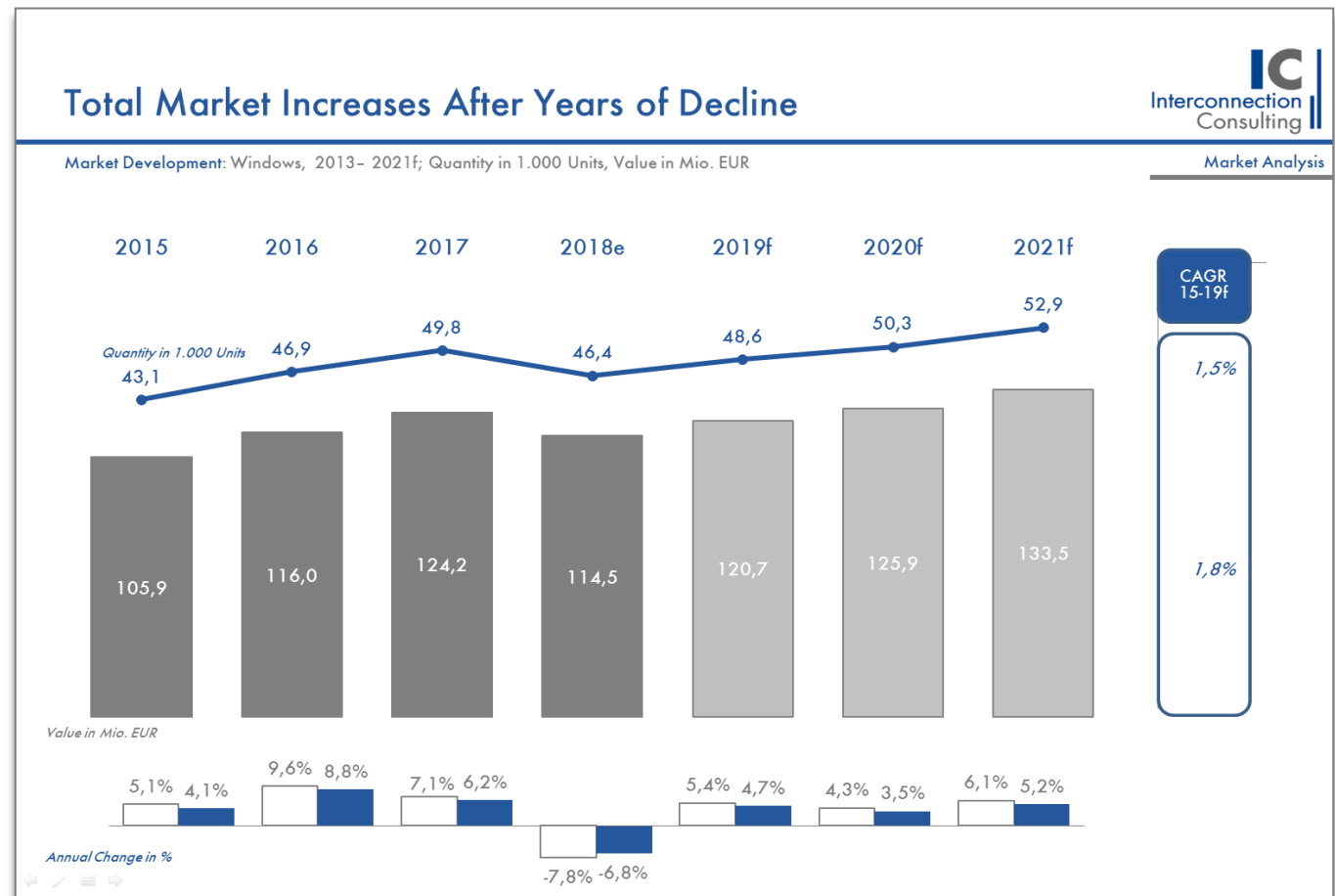
Market Environment Data of Our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators
- This chart shows dummy figures



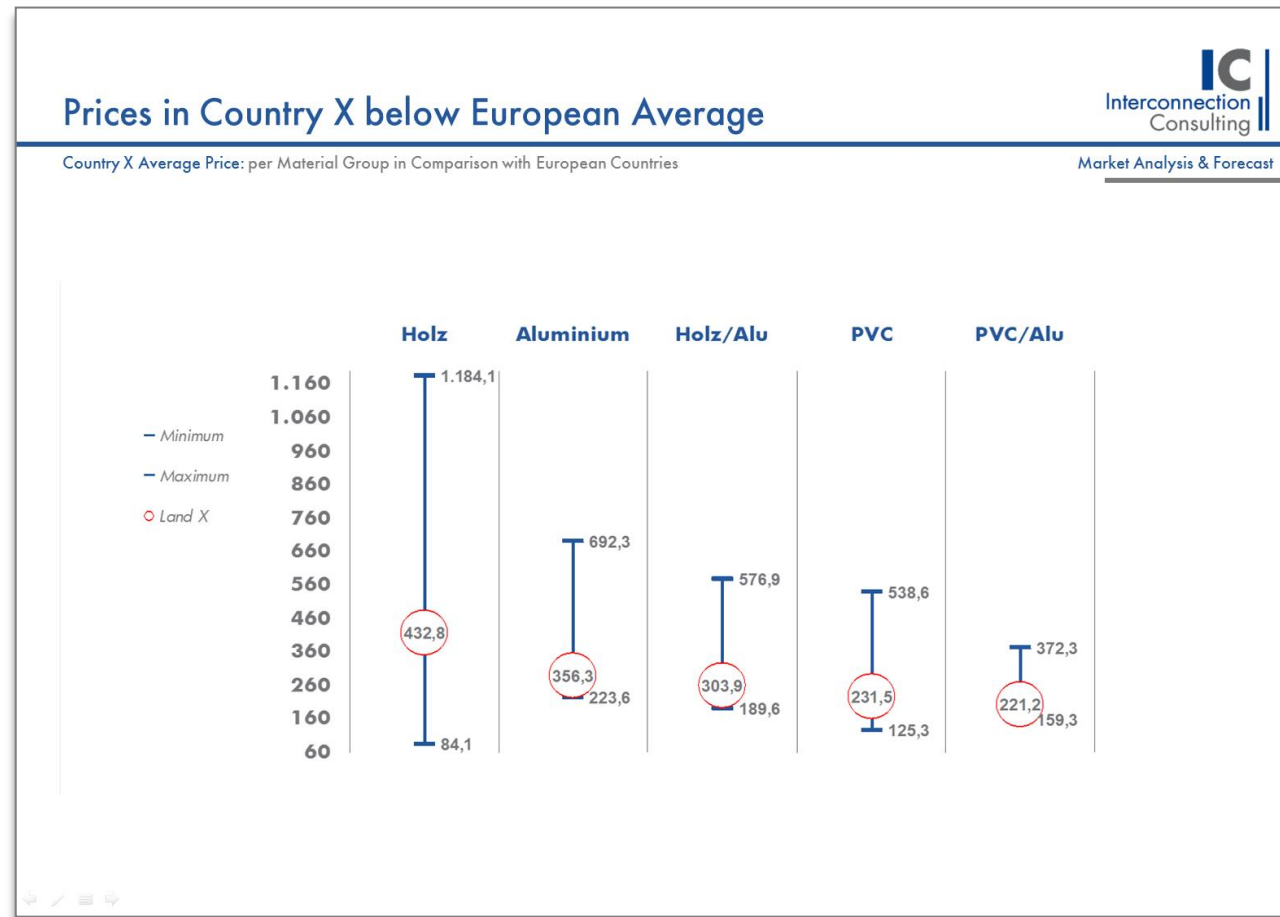
Total Market Development and Forecast

- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- This chart shows dummy figures.



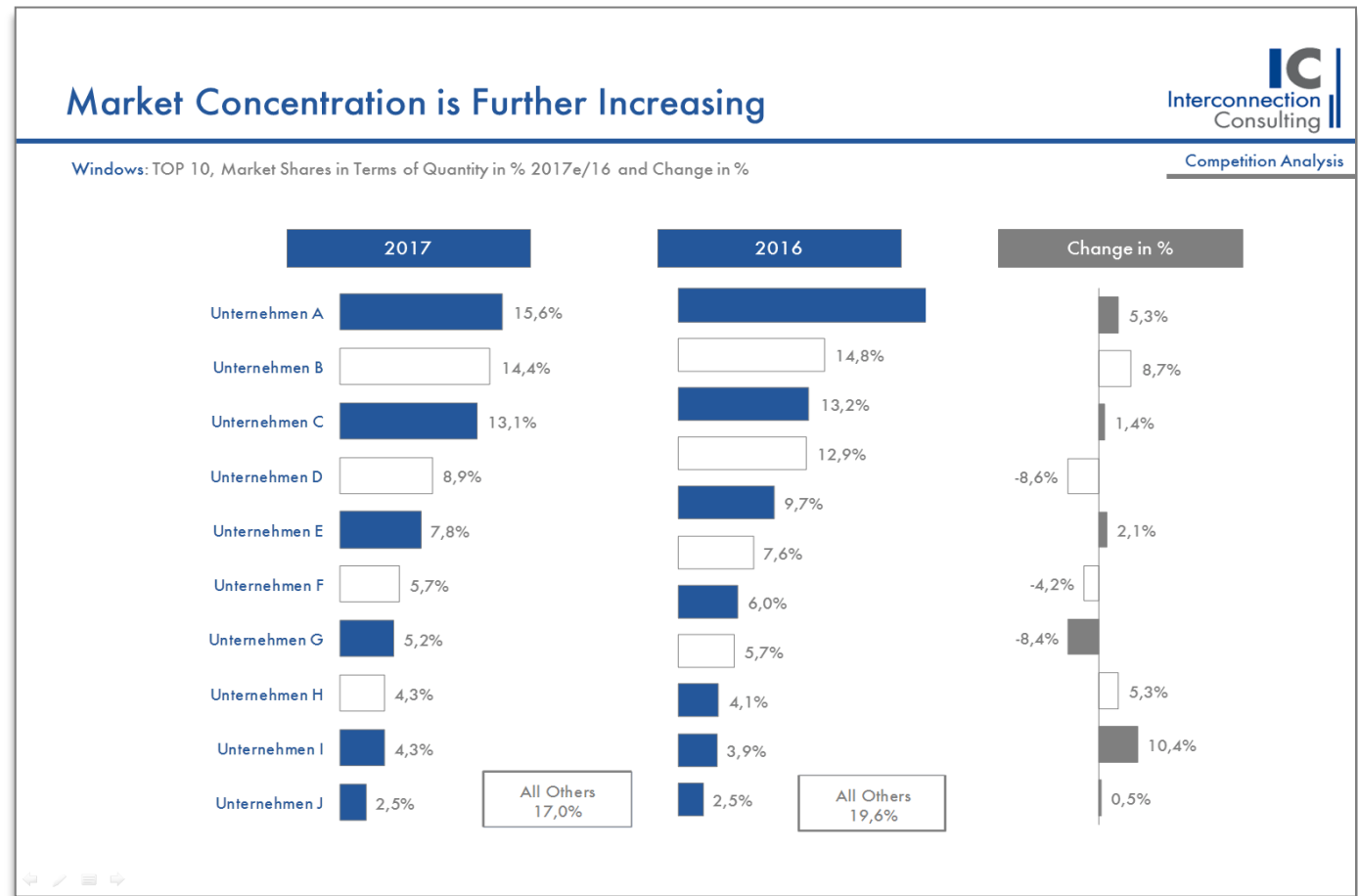
Price Development, Price Categories & Average Prices

- *We deliver benchmarks for every European country*
- *Analysis of the markets by price segments*
- *This chart shows dummy figures*



Competition Analysis and Market Shares

- *Market Shares of the Top 10 companies in the European core markets window industry*
- *This chart shows dummy figures*



- Additionally to the visualised report a Pivot Table will be included
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

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

Dieses Chart zeigt fiktive Zahlen zur Illustration

		IC Subscription*	Scale of Discounts**	
	Single Issue		€ 5.000,-	5%
Price Category A	€ 3.950,-		€ 10.000,-	10%
Price Category B	€ 2.950,-		€ 25.000,-	20%
			€ 40.000,-	25%
Category A	AUT	GER	SUI	
Category B	ITA	FRA	SKE	CZE

* **IC Subscription:** 20% 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

Price includes an interactive PDF Document. All prices shown exclude VAT

Your Advantages as a Subscription Customer

Please choose between Subscription*
or Single issue

☒ **Subscription*** ☐ **Single Issue**

As a subscription customer, you will receive the chosen report automatically at a reduced price upon publication of a new issue. Additionally you have access to the following benefits:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**
- **Annually updated reports** on fixed dates
- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)
- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the window industry.
- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



Our Market-Intelligence Tools

Market Analysis



Market Volume
Market Shares & Entry
Competition Analysis

Distribution Analysis



Channel Map
Distribution Matrix
Margins

Customer Insight



Focus Groups
Buying Motives
Customer Benefits

Market Forecasts



Indicator Models
Life Cycle Models
Econometric Analysis

Brand Analysis



Brand Scorecards
Brand - Triangle
Brand Affinity

Customer Satisfaction



Importance/Satisfaction
Portfolios
Customer Loyalty
Customer Typology

Price Research



Price-Sales-Function
Price-Simulation-Tool
Optimal Pricing

E-Commerce



E Commerce Insights
Search Engine Marketing
Web Channel Analysis

"IC is a permanent partner in market assessment and provides invaluable tools for decision making."

Mr. Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe

Customers of our Studies on Windows:



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

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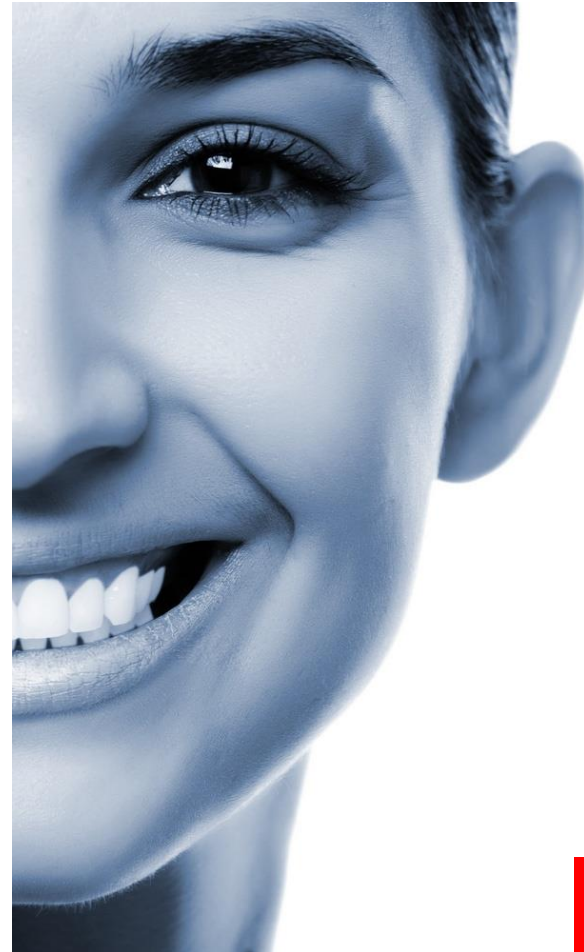
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Inquiry

Included in the Report

- Interactive PDF, (ca. 80 pages)
- Pivot Tables
- Optional: Hard Copy

Price

- Price Category A: 3.950 €
- Price Category B: 2.950 €
- Colour print option: 150 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.



Options of ordering – Fax: +43 1 5854623 30

- Click „Buy Now“ on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

Structure of the Study

Language of the Study

English; D/A/CH in German, F in French;
Other languages on request

Introduction, Market Structure and Executive Summary

Definition and limits of product groups, as well as a summary of the results

Market Drivers

Summary of the most important market driving factors on the market

Overall Market and Forecast

Market development by quantity and in value in various segments of the market for the upcoming three years

Competition Analysis

Detailed market shares of leading companies from several sectors over the previous few years.

Market Structure

Countries available

Germany, Austria, Switzerland, Italy, France, Slovakia, Czechia

Customer Categories

Residential, Non-residential

Frame Material

PVC, Metal, Wood, Wood-Metal, PVC-Metal

Business Categories

New construction, Renovation

Price Category

Budget, Medium, Premium

Distribution Channels

Direct, indirect

Glazing Varieties

Single, Double, Triple

Methodology

Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.