www.interconnectionconsulting.com

IC Market Tracking Cooling Ceiling 2017

- Germany
- France
- Italy
- Switzerland
- Poland
- Austria

IC Market Tracking® I Forecast I Profiles

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 2020** based off of our econometric forecast model.

✓ **A competition analysis** containing detailed **market shares** for selected regions in terms of:

- The total market
- Functionality
- Material
- Business
- Application

✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.

✓ Company profiles for regions, where competition analysis is not available

Cooling Ceilings in

| Austria | France | Germany | Italy | Poland | Switzerland |

Cooling ceilings Market by

Functionality	Material	Business	Application
Radiation	Gypsum	New Construction	Office
Convection	Plastering	Renovation	Industry
	Metal		Commerce
	→ Copper		Other
	→ Plastic		
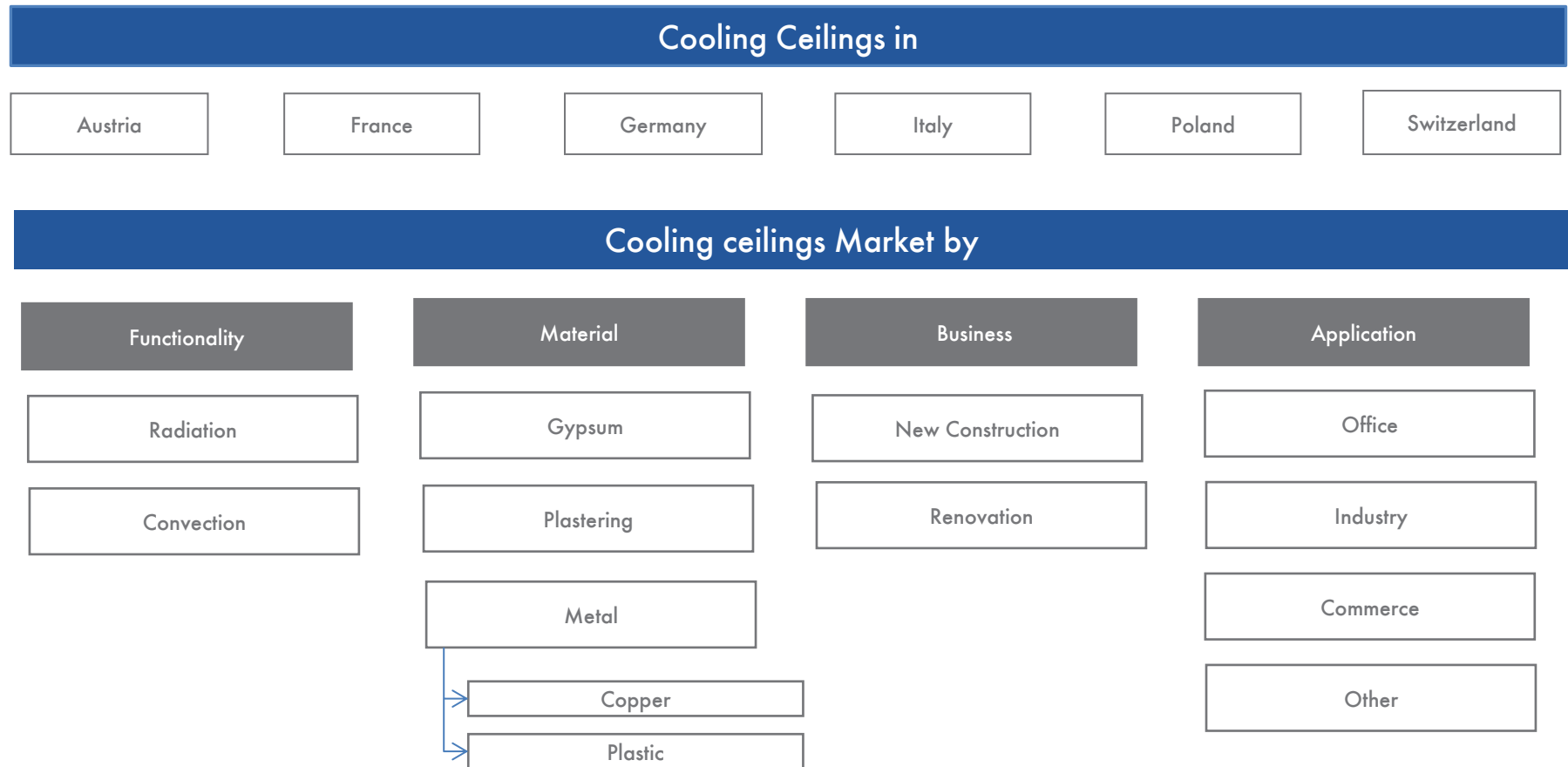
For every market segment we will analyse the overall market during the previous two years and additionally make a forecast for the next 3 years.

Definition and Demarcation

Functionality

Radiation

A radiant cooling system refers to a temperature-controlled surface that cools indoor temperatures by removing sensible heat and where more than half of heat transfer occurs through thermal radiation.

Convection

In convection systems, the transfer of the freshness happens through a gas or liquid by the circulation of cooled particles.

Definition and Demarcation

Material

Gypsum	Cover panel made of gypsum
Metal	Cover panel made of metal
Plastering	Cover panel made of metal

Register

| Copper | Copper - capillary tube mat |
| Plastic | Plastic - capillary tube mat |

Application

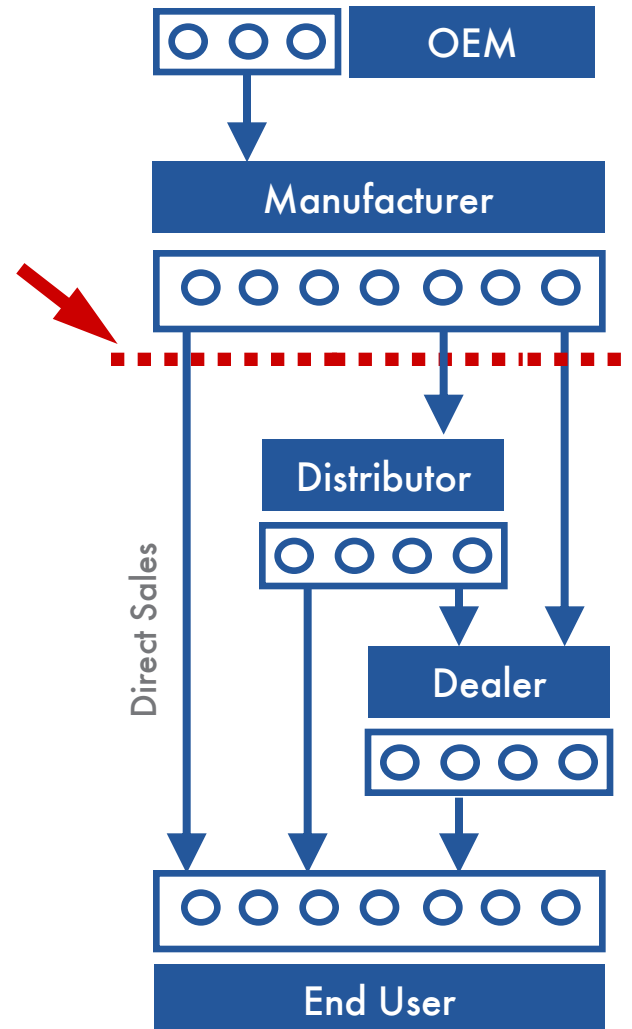| New Construction | Application in newly erected buildings |
| Renovation | Application in renovated constructions |

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)
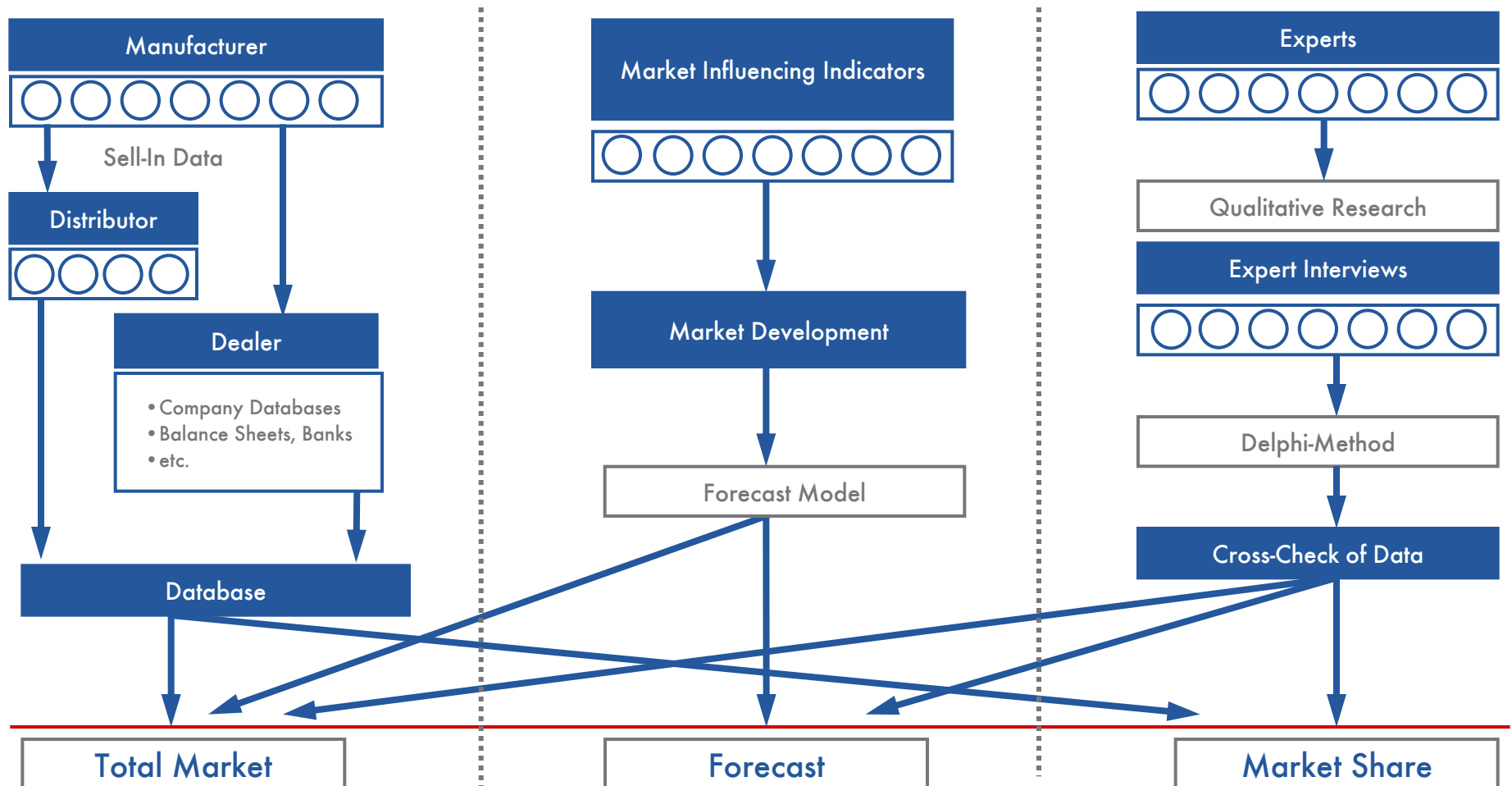
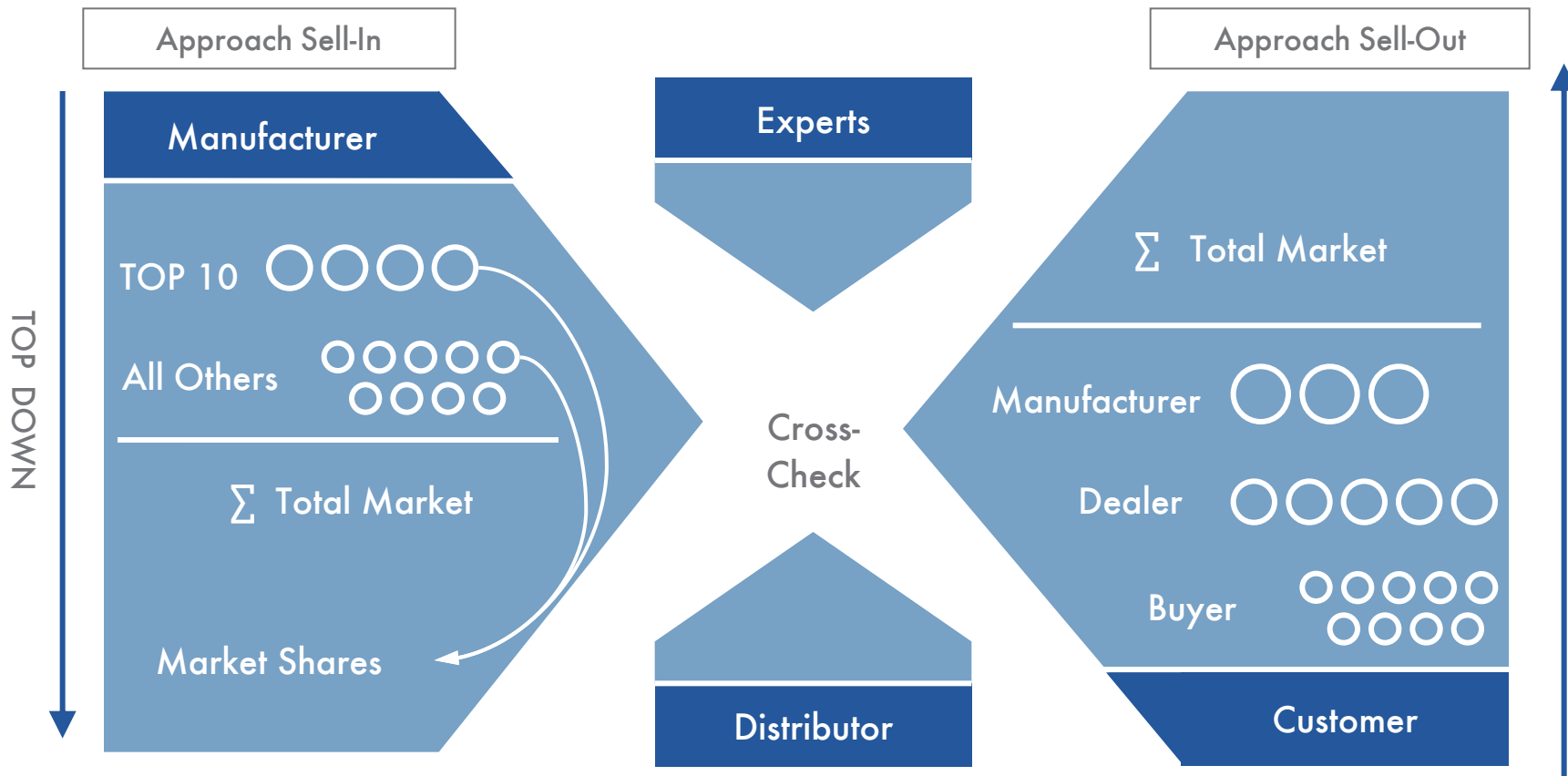Sales are segmented by the first distribution partner.

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.

OEM

Manufacturer

Distributor

Direct Sales

Dealer

End User

How Do We Conduct Our Research?

Description Structure of Survey Methodology

How Do we Cross Check the Data?

Description Structure of Survey Methodology

Interconnection Consulting

Approach Sell-In

Manufacturer

TOP 10

All Others

∑ Total Market

Market Shares

TOP DOWN

Experts

Cross-Check

Distributor

Approach Sell-Out

∑ Total Market

Manufacturer

Dealer

Buyer

Customer

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.

Content of the Report *

1. Executive Summary (ca. 10 pages)

2. Definition and Methodology (ca. 5 pages)

3. Market Drivers (ca. 20 pages)

4. Regional Market Analysis and Forecast (ca. 20 pages)

5. Competition Analysis (ca. 20 pages)

6. Tables, Facts and Figures Pivot Table

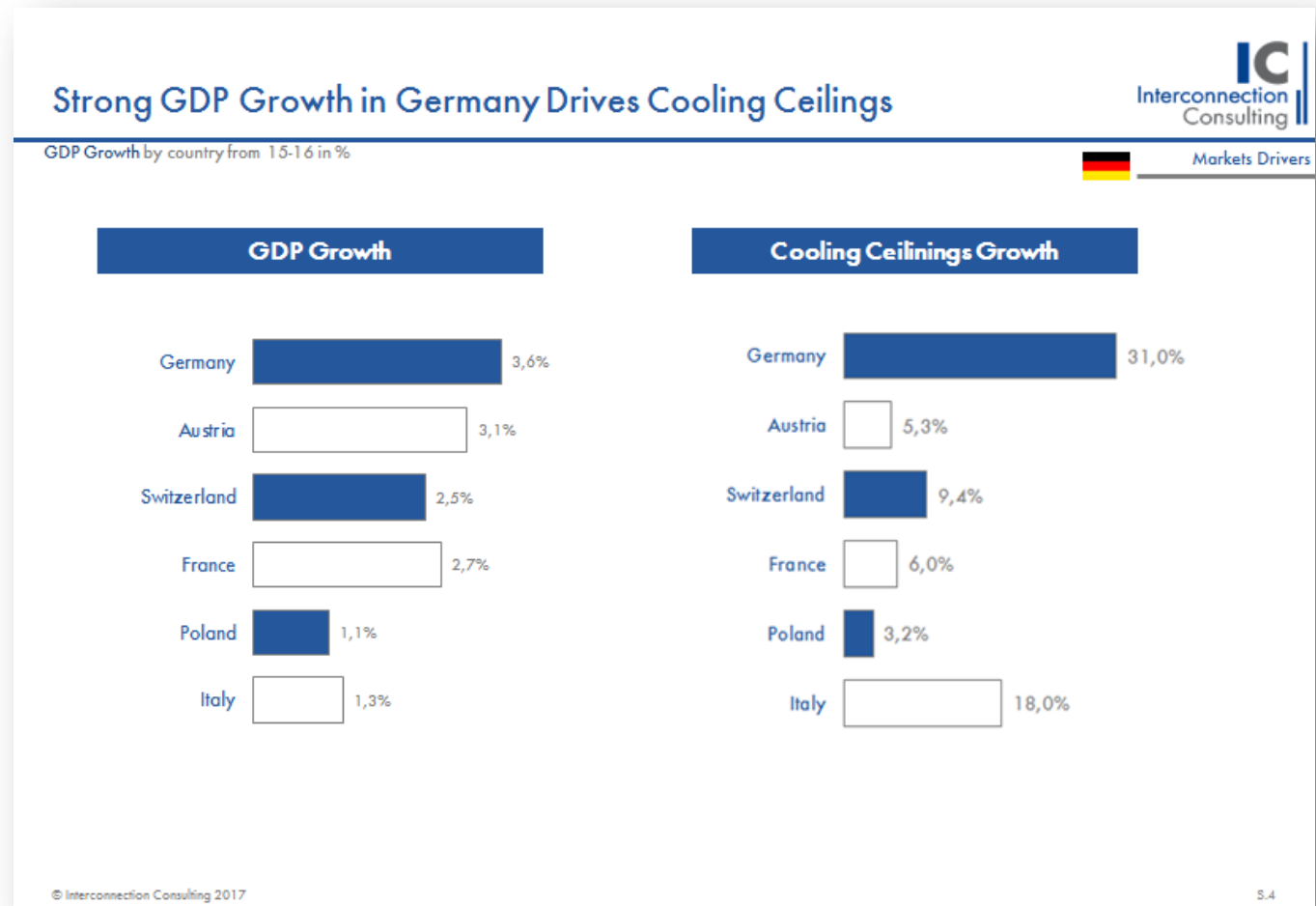*Pages based on single country report

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
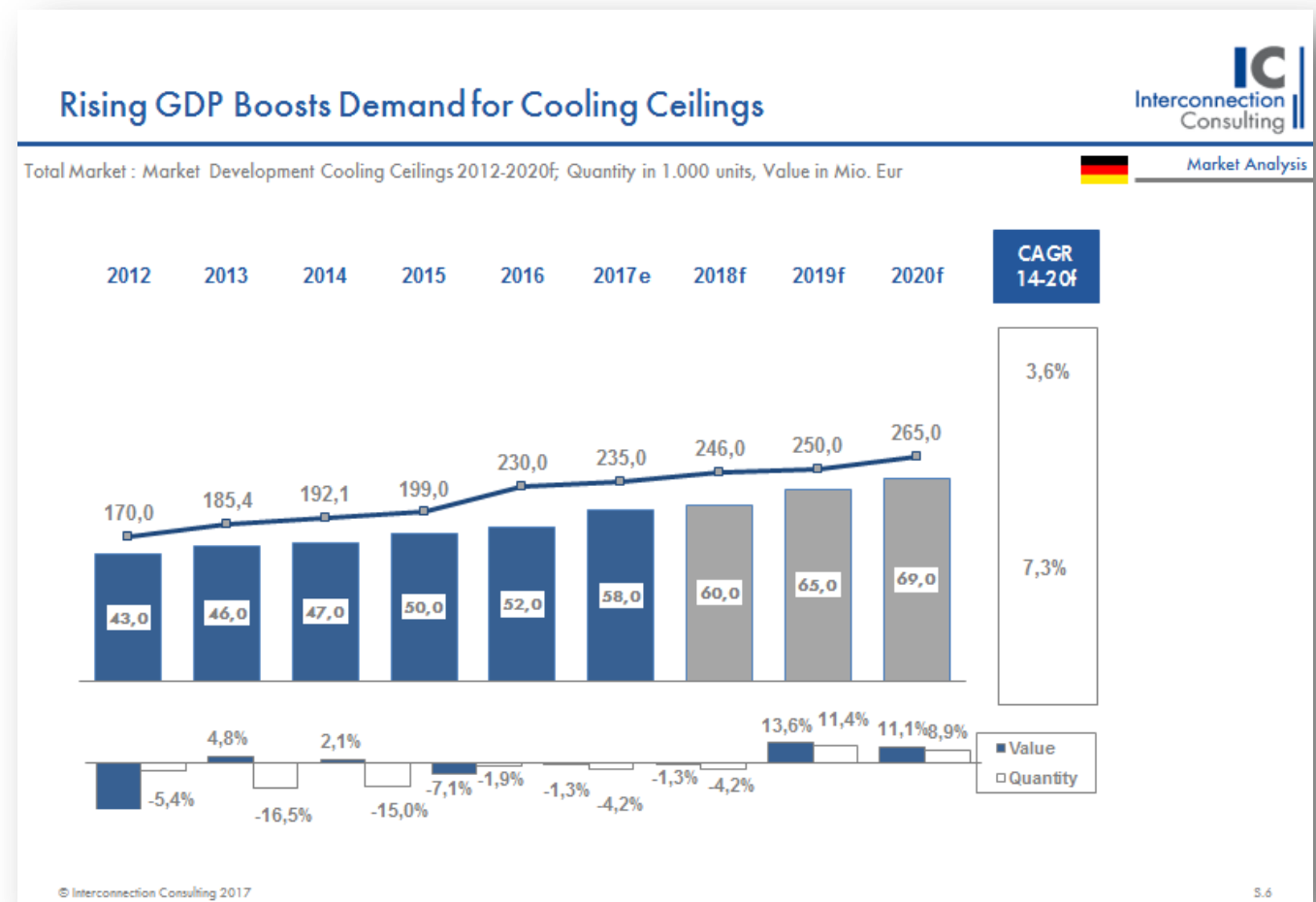
- *This chart shows sample figures.*
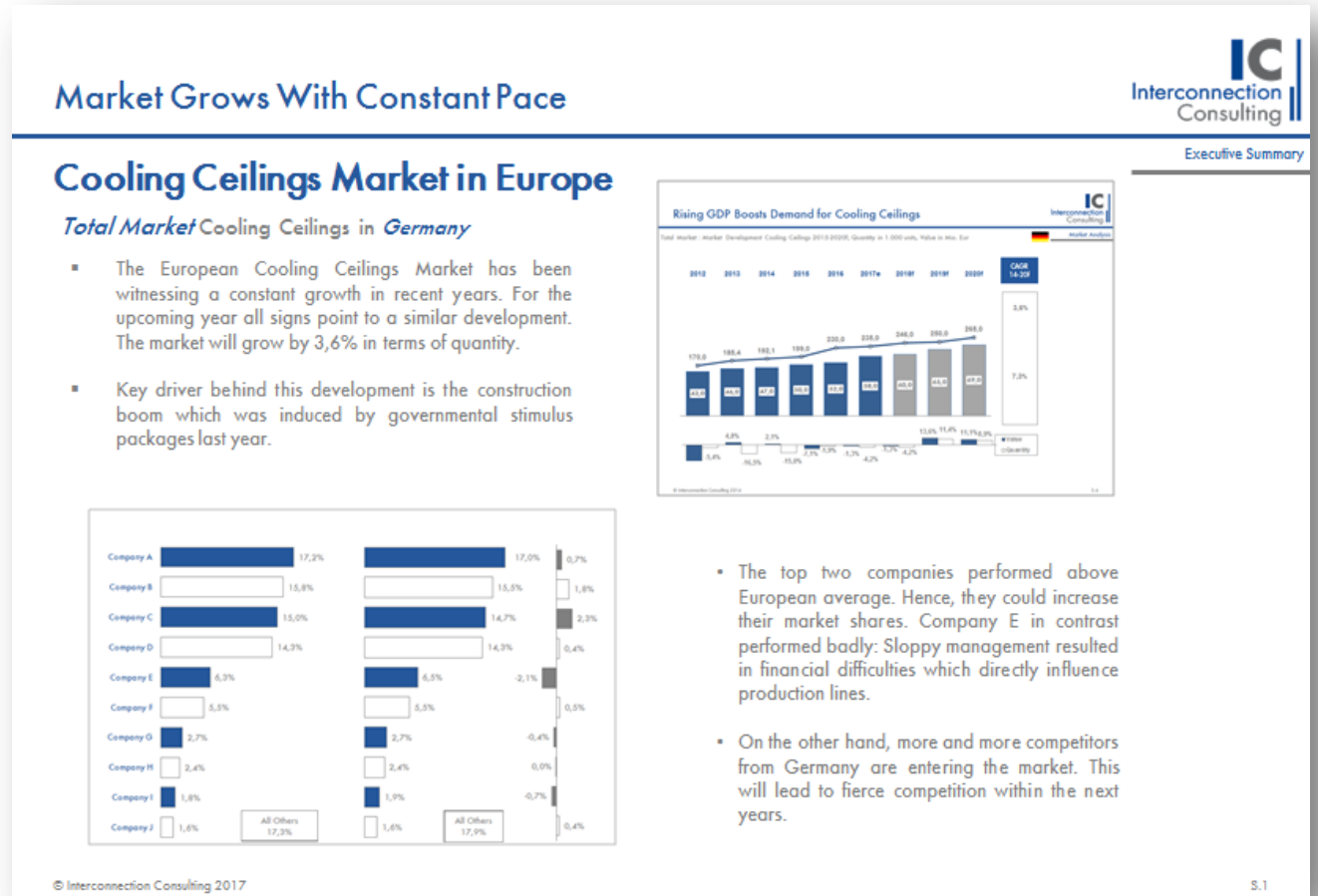
Market Environment Data of Our Forecasting Model

■ 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 sample figures.*

Strong GDP Growth in Germany Drives Cooling Ceilings

GDP Growth by country from 15-16 in %

Markets Drivers

GDP Growth

Country	
Germany	3,6%
Austria	3,1%
Switzerland	2,5%
France	2,7%
Poland	1,1%
Italy	1,3%

Cooling Ceilinings Growth

Country	
Germany	31,0%
Austria	5,3%
Switzerland	9,4%
France	6,0%
Poland	3,2%
Italy	18,0%

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# 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.*

Product Group Development

- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.

- *This chart shows dummy figures.*

Competition Analysis and Market Shares
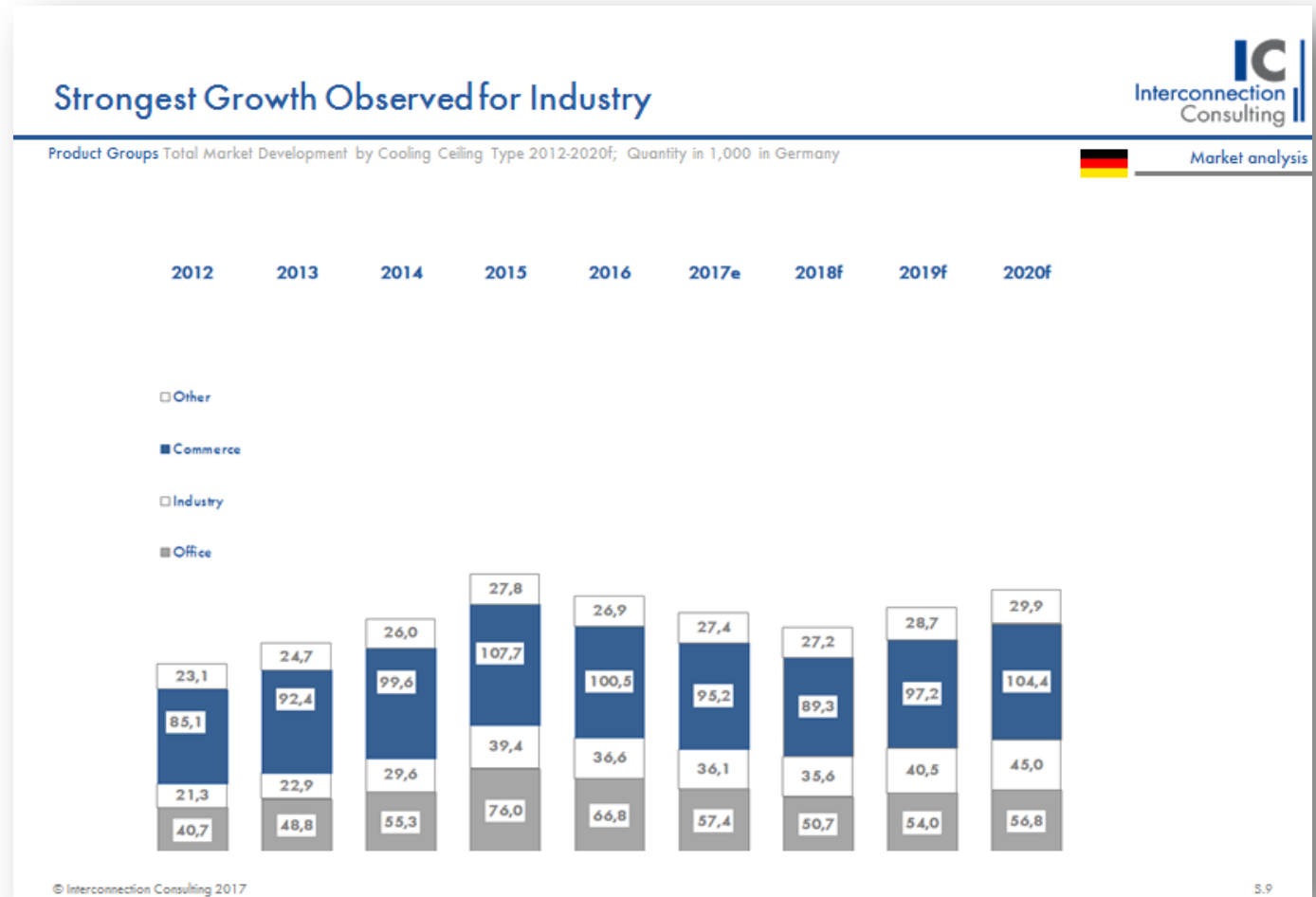
- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.

- *This chart shows dummy figures.*
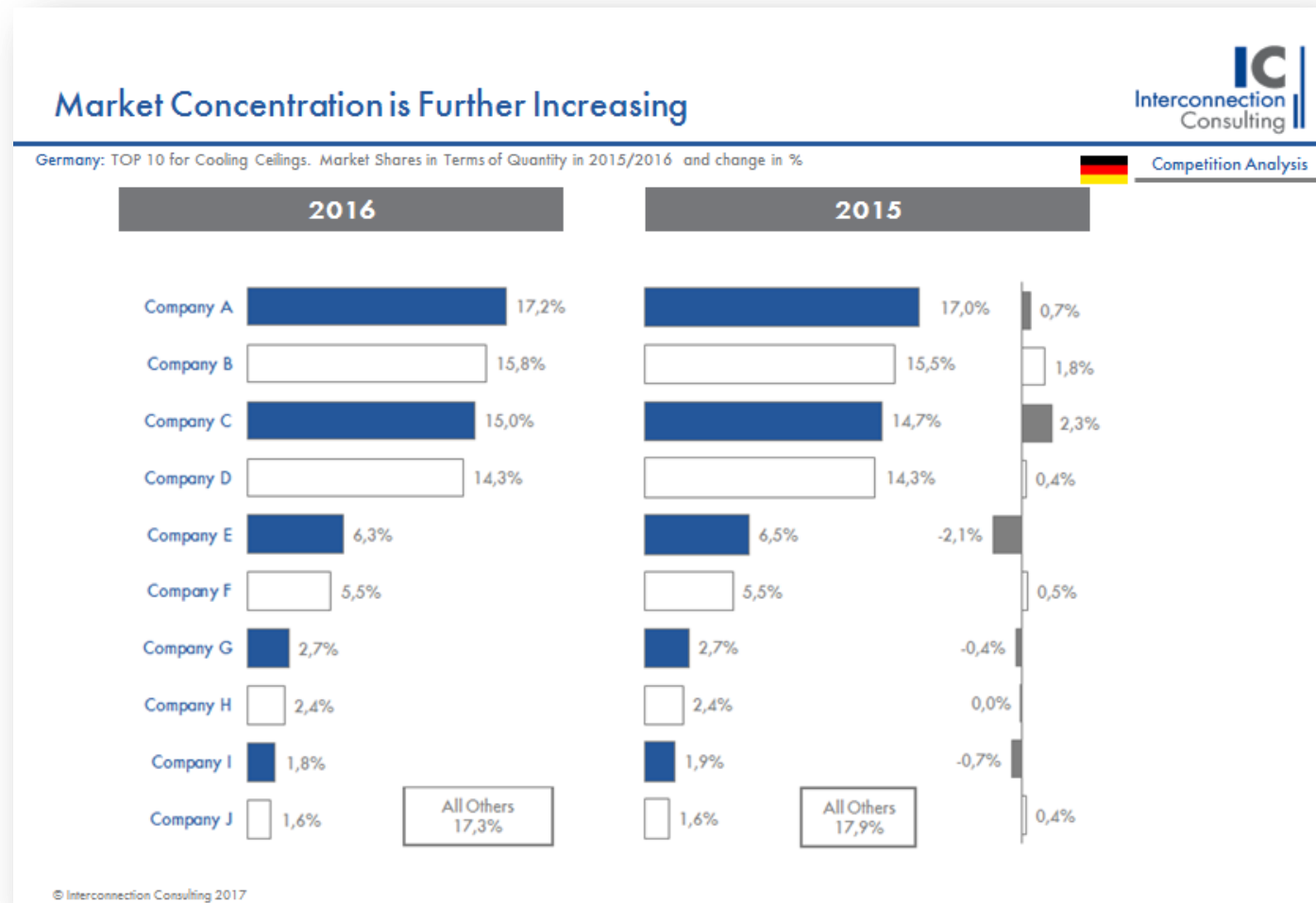
Pivot Table

- In addition to the visualized 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 modelling.

- 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

Investment Plan for Your Market Research

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Interconnection
Consulting

	Single Issue	**IC Subscription***	**Scale of Discounts**
Single Country	€ 3.950,-		€ 5.000 -10%
		IC SUBSCRIPTION 20 % PRICE ADVANTAGE	€ 7.500 -20%
Europe Total **	€ 15.879,-		€ 10.000 -33%

Available countries

Austria	France	Germany	Italy	Poland	Switzerland

* **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.

****Europe Total** (scale of discounts <u>are not</u> applicable, subscription applies)
Price includes an interactive PDF Document. All prices shown exclude sales tax

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 from now on as soon as the new edition of the report is published. 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

- 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

Webverstärker

E Commerce Insights

Search Engine Marketing

Web Channel Analysis

"IC is a permament 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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we show you the way

Factsheet: Cooling Ceilings 2017

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Included in the Report
- interactive PDF, Pivot Tables
- Pages (approx.) 75/ per Country
- Optional: Hard Cover: 150 €

Price
- Per region: 3.950 €
- Total Europe: 15.879 €

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.

Content of the Market Report

Structure of the Study

Language of the report
English, German on Request

Introduction, Market Structure & Executive Summary
Definition and demarcation of product groups, regions and methodology; summary of study results

Market Drivers
Key economic factors influencing the market: consumer behaviour, main economic indicators etc.
Import & export statistics

Total Market Analysis
Total market development and forecasts for all market segments in quantity and value by regions, product groups, driving system types and application fields and automation.

Competition Analysis
Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

Market Structure

Regions:
Germany, Austria, Switzerland, Poland, Italy, France

Types
Radiation and convection
Material
Gypsum, Plastering, Metal. Copper and plastic.
Business Segment
New Construction, Renovation
Application
Office, industry, Commerce, Others

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 analysed 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.