

IC Market Tracking
Solid Home
Construction in Austria
and Germany 2023

- ✓ 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 2026** based off of our econometric forecast model.
- ✓ **A competition analysis** containing detailed **market shares** in terms of:
 - The total market
 - Product groups
 - Distribution channels
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.



Solid Residential Construction

Marktet by...

| Type of Concept | Building Stages | Types of Houses | Regions | | | Price Classes |
|------------------|-------------------------|-------------------|-----------------------------|------|-------|-----------------------|
| System Houses | Shell-Finish | One-Family-Houses | <div>DE</div> <div>AT</div> | | | 250.000 – 400.000 EUR |
| Architect Houses | Floor Covering | Two-Family-Houses | North | Wien | | 400.001 – 550.000 EUR |
| | „Turn-Key“ Construction | Row Houses | East | NÖ | OÖ | 550.001 – 700.000 EUR |
| | | | West | B | S | > 700.001 EUR |
| | | | South- East | St | Tirol | |
| | | | South- Weist | K | V | |

For all represented segments we show the total market and a forecast up to 2026, as well as market shares of the top 10 players for the last years.

NET - Incoming orders

Actually realized, signed orders

Solid houses

Not prefabricated, but individualized and usually without a fixed price and without a fixed construction project duration. Solid houses are the share of the total construction market that is not accounted for by prefabricated houses.

Types of Houses

Single family houses

Building that serves as a residence for a single family and contains only one dwelling unit.

Two-family houses

Building that serves as a residence for two families and, accordingly, contains two residential units.

Row Houses

Identical houses built on a contiguous plot under one project.



Types of Concepts

System Houses

Are built with fixed prices and fixed construction project durations. They are rather standardized and prefabricated. There are often model houses for this purpose.

Architect Houses

Individually planned projects. No fixed prices. Not standardized.



Definitionen und Abgrenzungen

Building Stages

Shell-Finish

Finished building envelope with plaster, windows and exterior doors, roofing, empty piping and empty wiring, chimney or flue pipe, raw stairs.

Floor Covering

In addition to the finishing house: heating, wiring, WITHOUT flooring, wall coverings, interior door leaves, sockets, plumbing.

„Turn-Key“ Construction

In addition to the surfacing ready house: flooring, wall coverings, interior door leaves, sockets, plumbing.

CAGR

CAGR (Compound Annual Growth Rate) represents the average annual growth of a quantity under consideration over the period under review.

$$r = (E / B)^{(1 / n)} - 1$$

Regions Germany

North

Hamburg, Bremen, Schleswig-Holstein, Lower Saxony

East

Berlin, Mecklenburg-Western-Pomerania, Brandenburg, Saxony-Anhalt, Thuringia, Saxony

West

North Rhine-Westphalia, Hesse, Rhineland-Palatinate, Saarland

South West

Bavaria

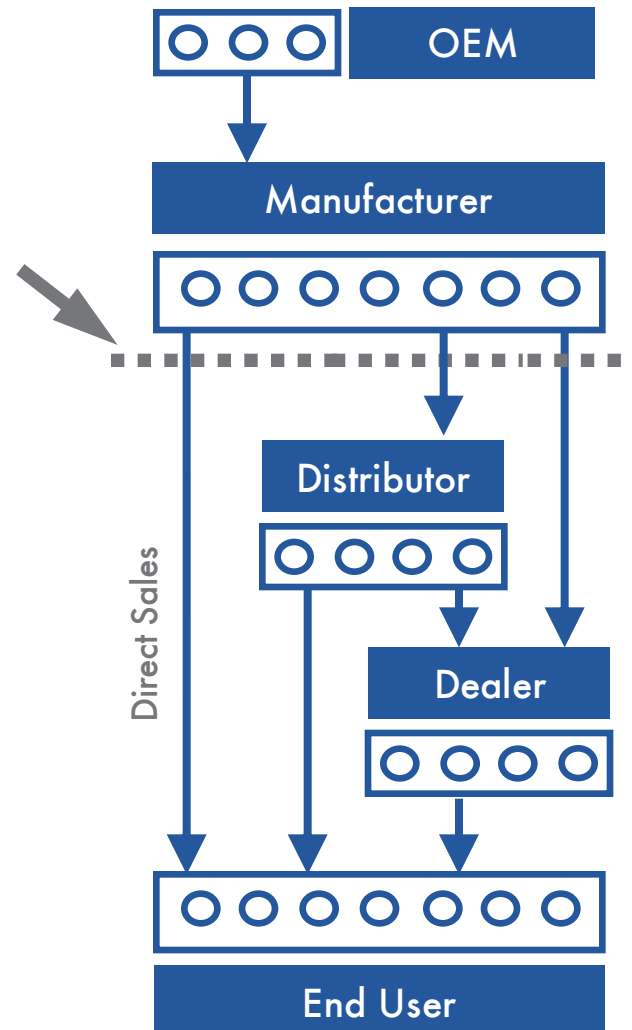
South East

Baden-Wuerttemberg

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.



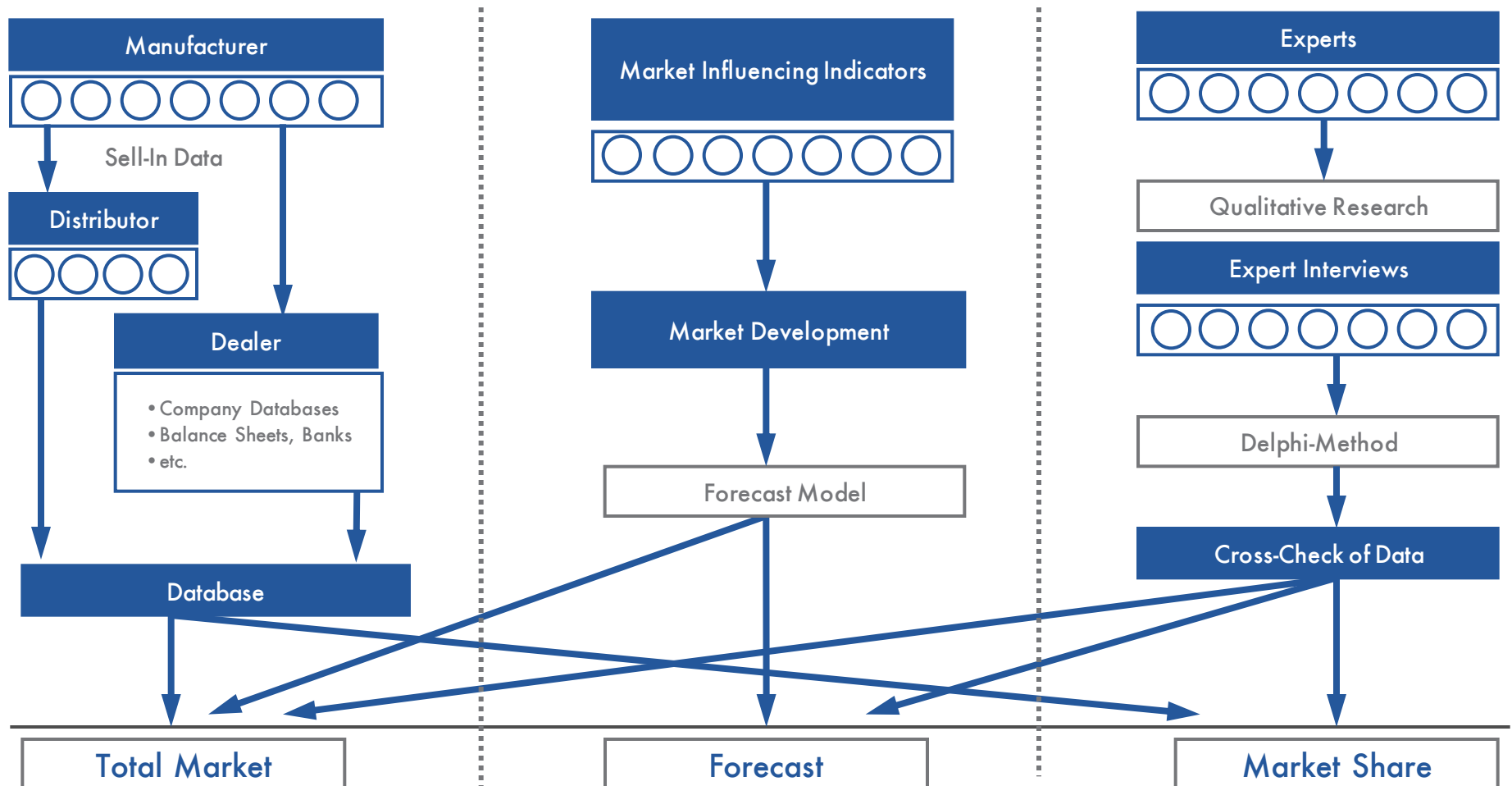
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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.

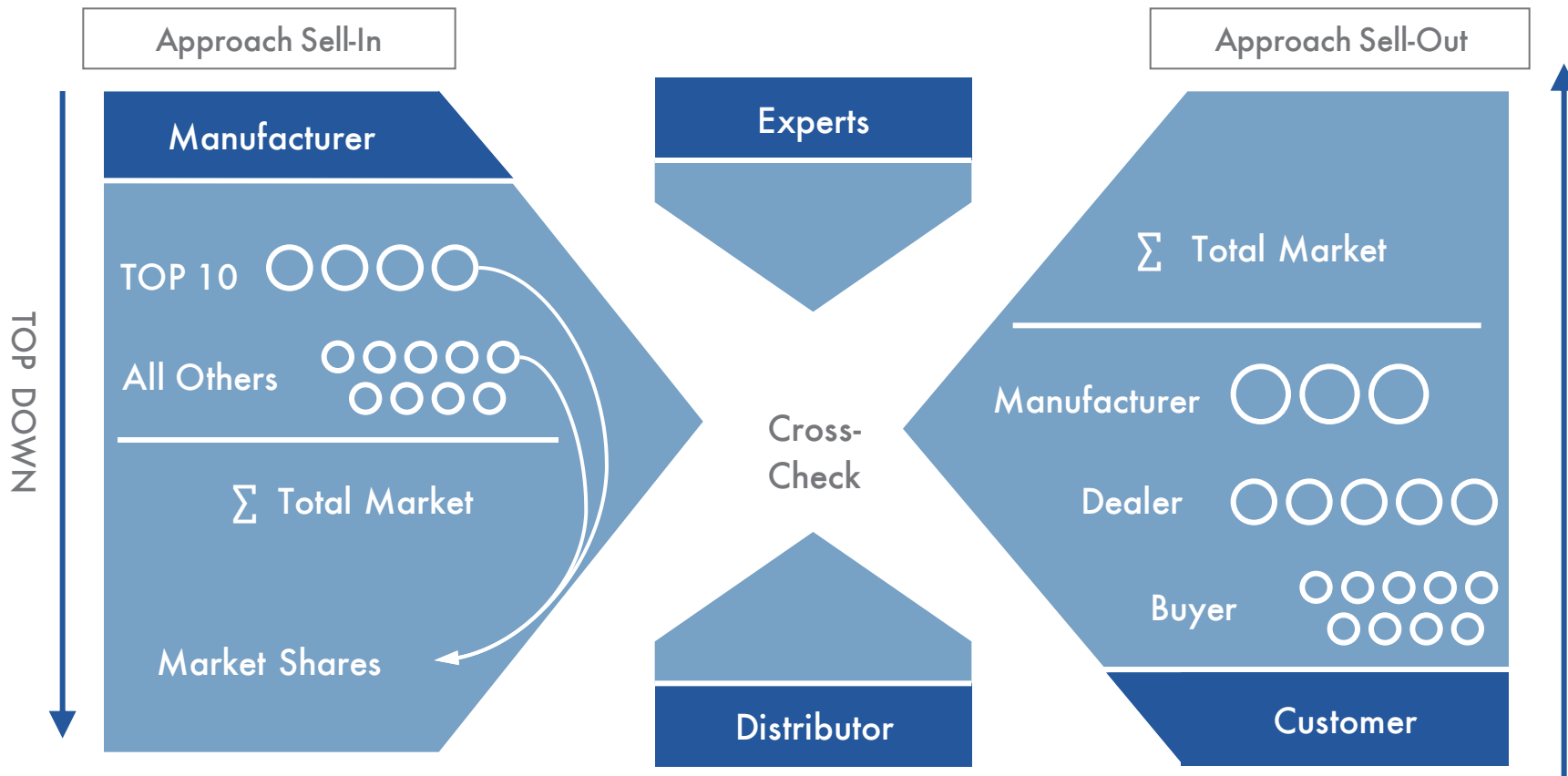
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology



How Do we Cross Check the Data?



Content of the Report

The IC Market Tracking® is modularly built and consists of the following sections:

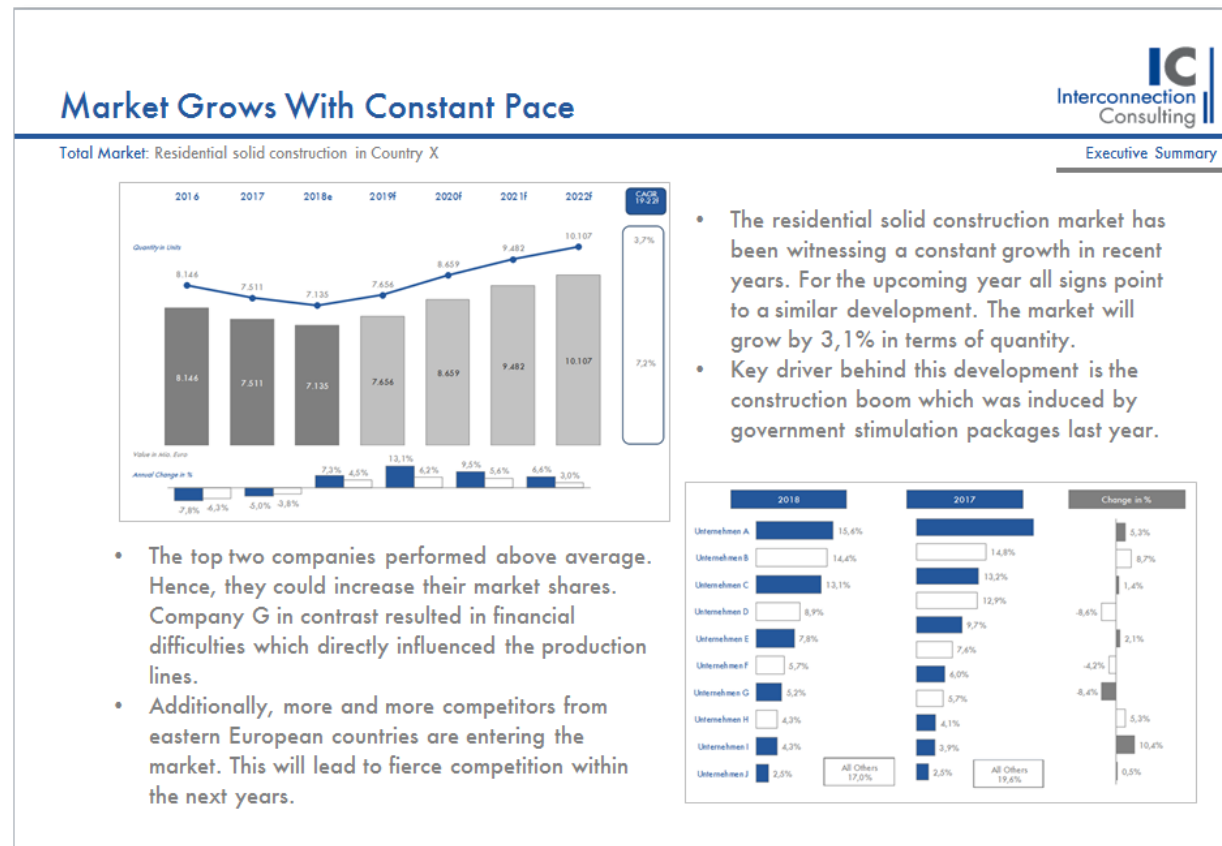
Content

- 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.

Executive Summary at the Beginning of the Report

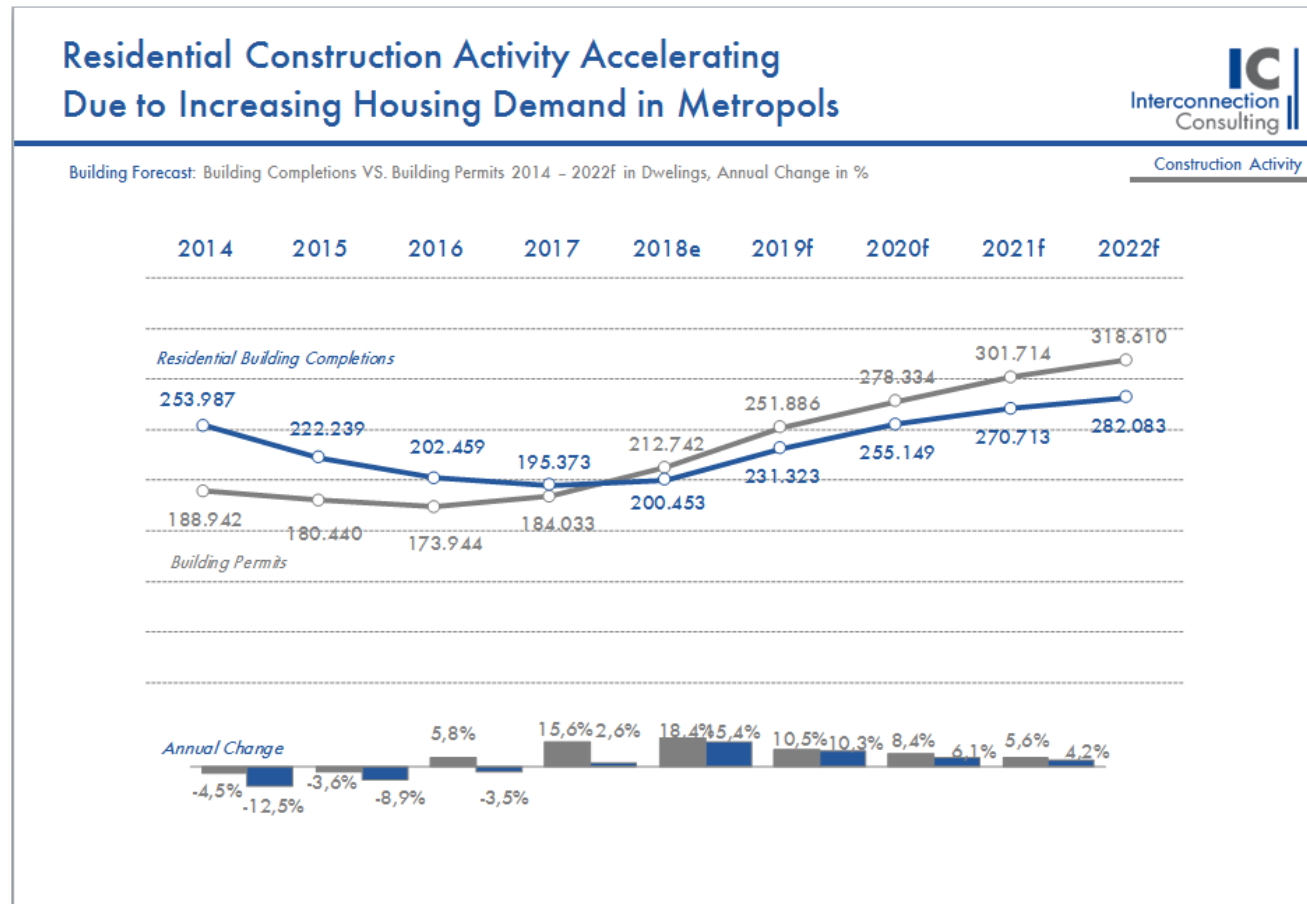
Sample Charts

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



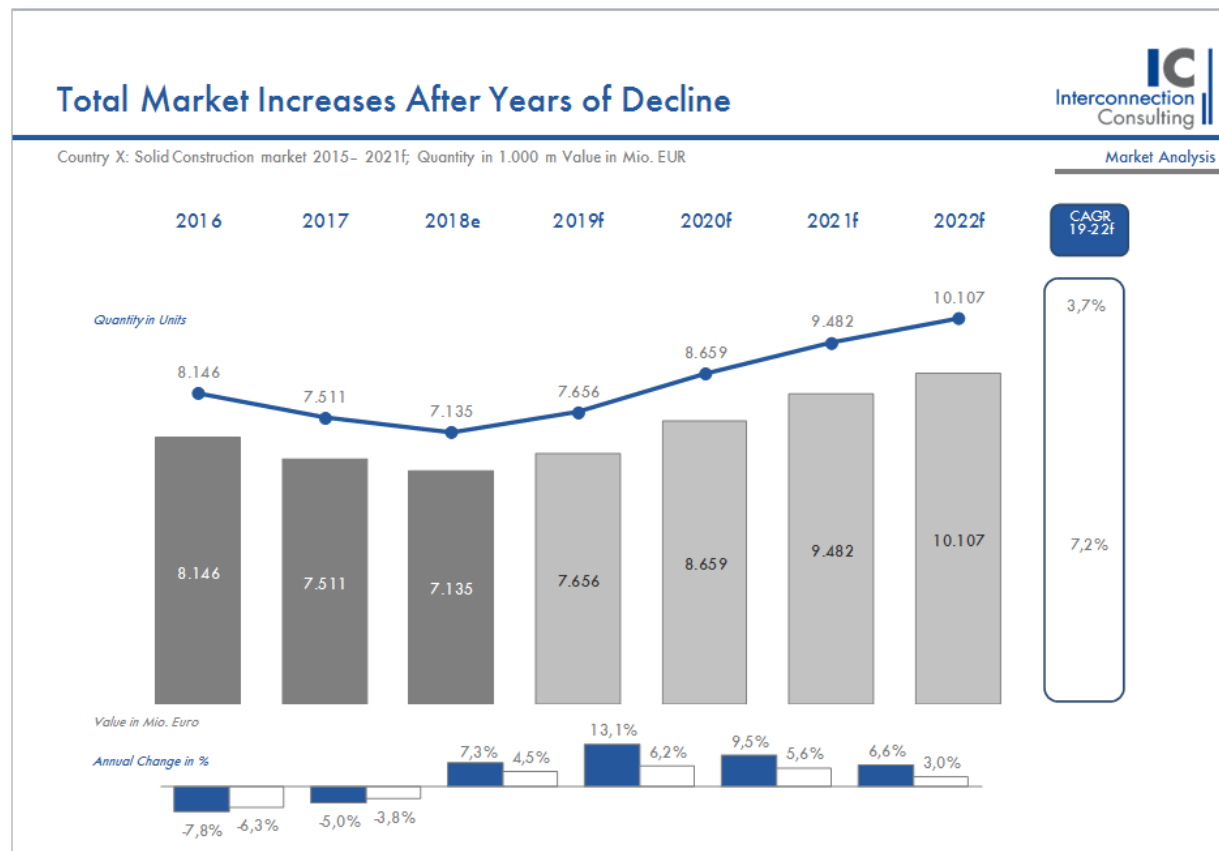
Market Environment Data of Our Forecasting Model

- 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 sample figures.*

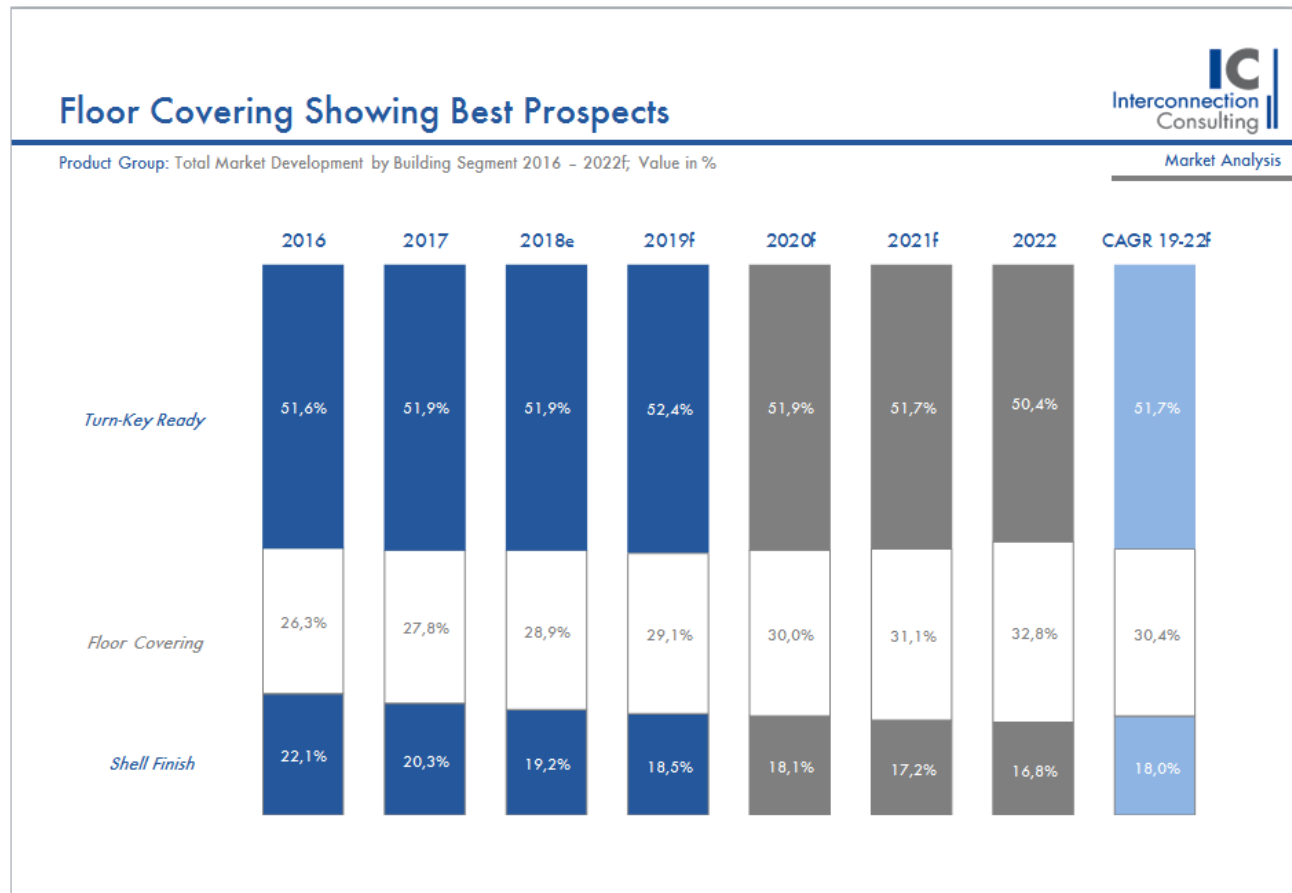


Total Market Development and Forecast

- 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.*



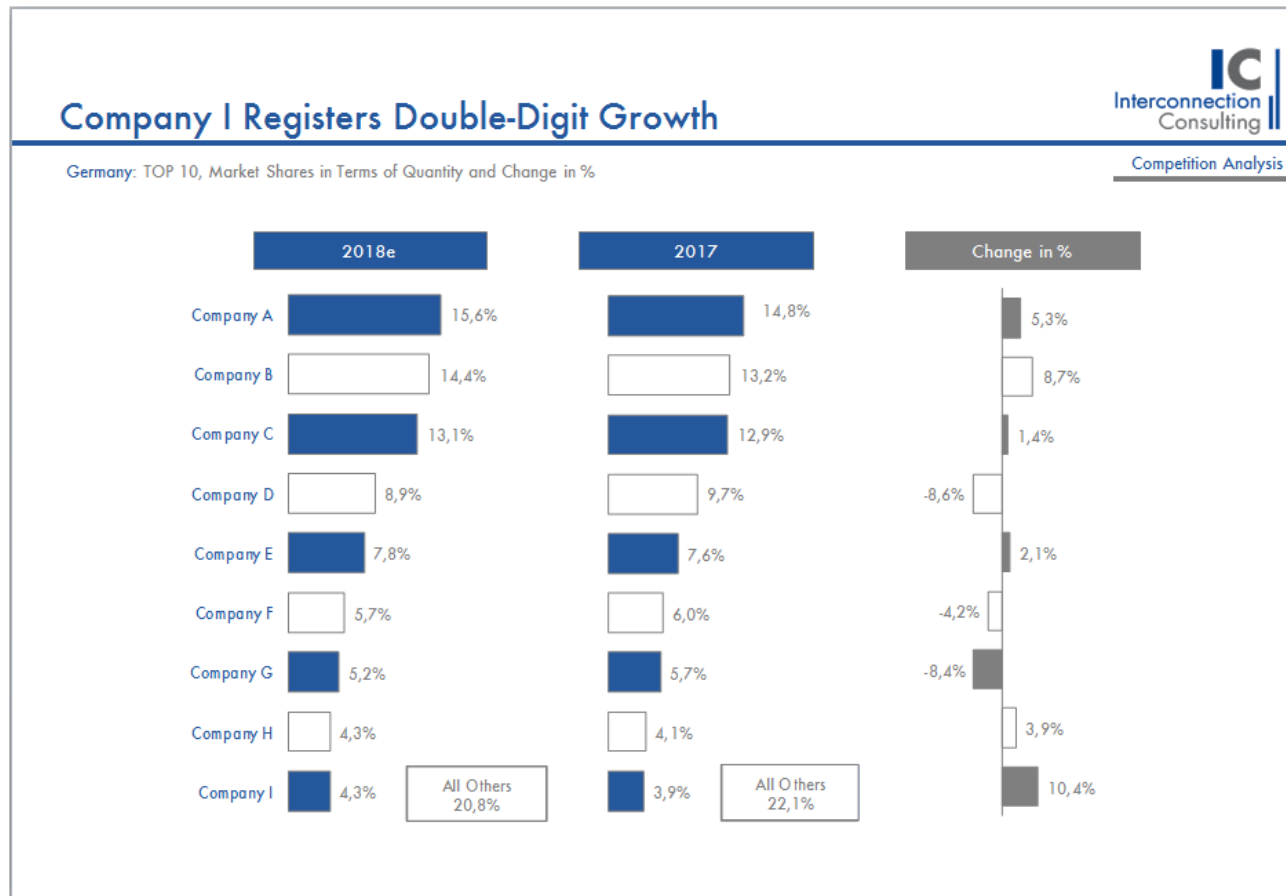
- Overview of the Product Group Segmentation, Price Segments as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



Competition Analysis and Market Shares

Sample Charts

- 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.*



IC Cockpit-Solution

Online Tool with Interactive Dashboards Presenting the Data

A picture says more
than 1000 words

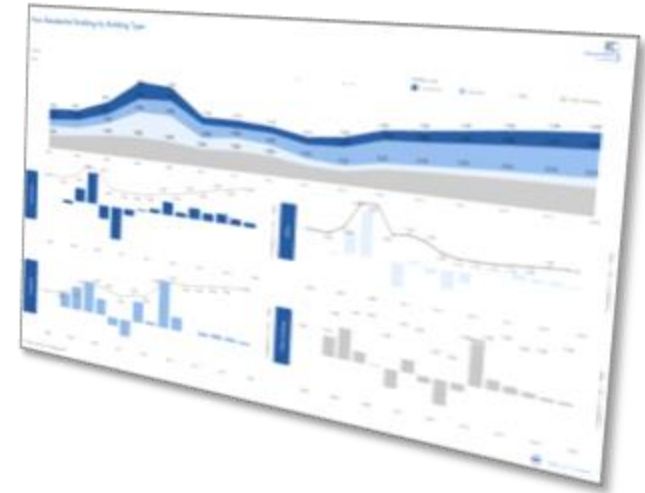
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

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



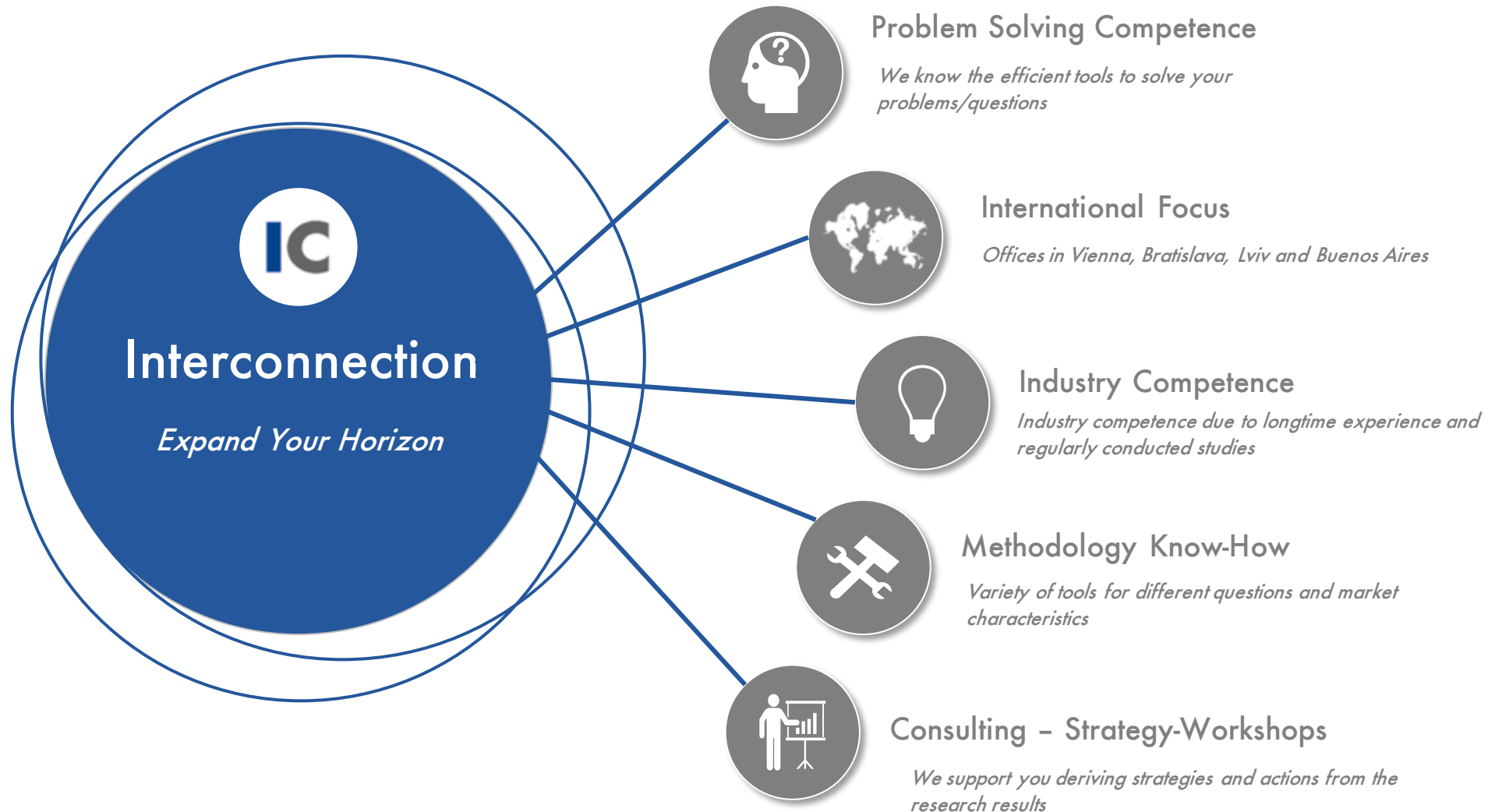
Software license costs are EUR 600,- in case of purchase of one country report. Software license costs are included when more than one country report are purchased.

Investment Plan for Your Market Analysis

| | Subscription* | Single Issue |
|------------------------|---------------|------------------------|
| Single Country | € 3,999.- | +25% for Single Issues |
| Total Report – D and A | € 7,998.- | |
| Available Countries: | Germany | Austria |

* **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.

Interconnection Provides Data for Corporate Decisions



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



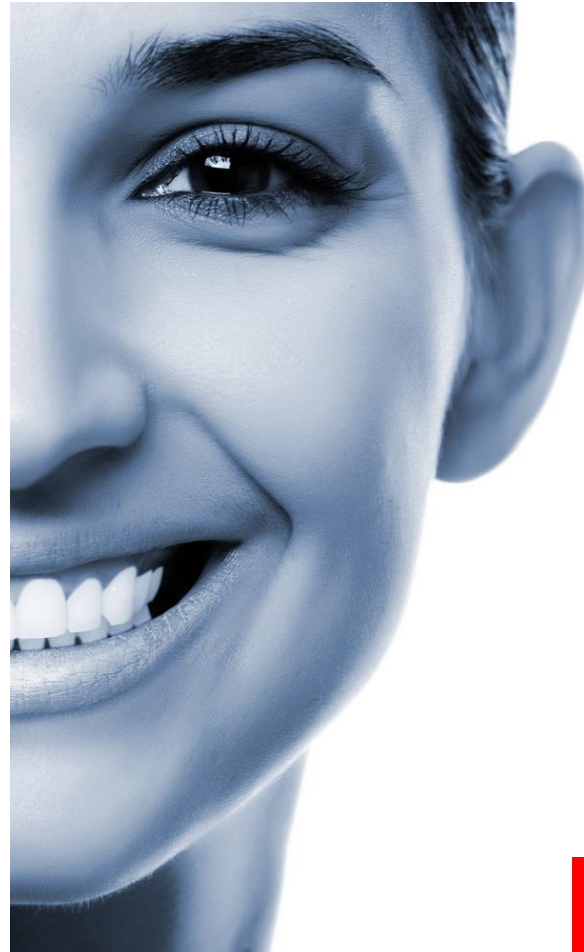
If there are any questions please
do not hesitate to contact us!

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Inquiry

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

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