



IC Market Tracking® Heating Biomass Boilers

Europe Top 6 2024

Defining Growth Potential since 1998



What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

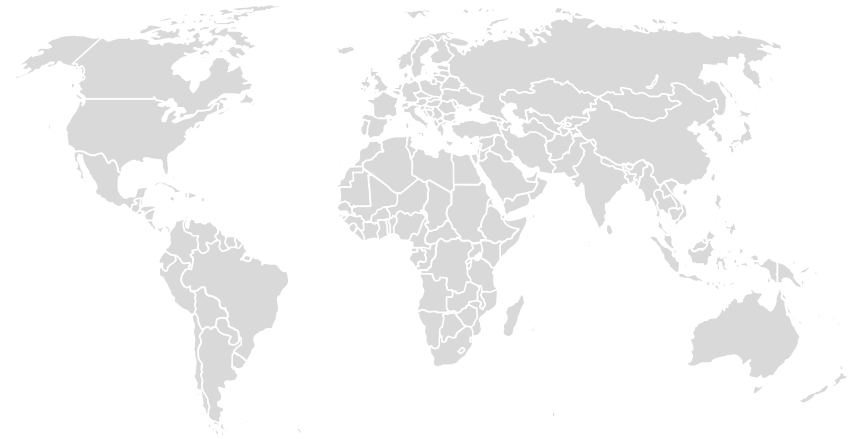
- Historical market data from 2021 – 2023 for the total market development as well as
 - Boiler Type
 - Heat Output
 - Business Segment
 - Customer Segments
 - Distribution Channels
- Forecasts from 2024e – 2027f for the total market as well as each analyzed, Boiler Type, Heat Output, Business Segments, Customer Segments and Distribution Channels
- Annually updates of the data

COMPETITION ANALYSIS

- Market shares of the top players for 2023/2024e
- Market Shares on the total market in Value and Quantity

MARKET DRIVERS

- Analysis of the most relevant market drivers such as real GDP change, inflation, recorded unemployment, building completions and permits
- Continuous updates of the data



Market & Competition 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

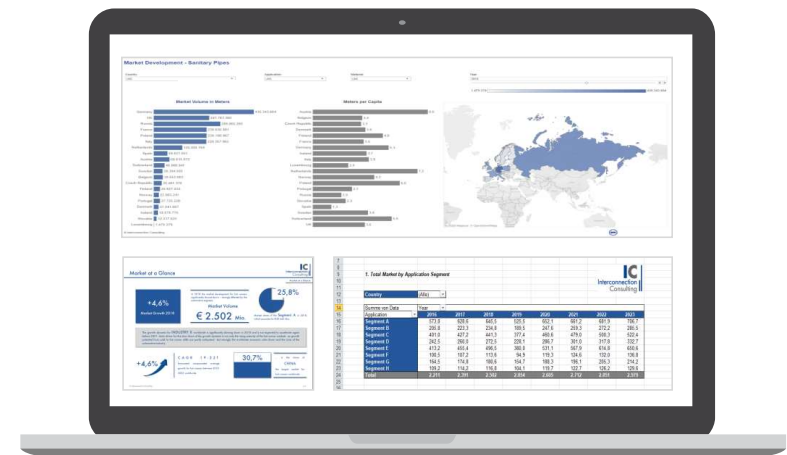
- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of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



Market Intelligence Tool and Reports



Online-Dashboards

Executive Reports

Pivot Tables

Markt Structure

IC Market Tracking® Heating Biomass Boilers Europe Top 6 2024

Germany

Austria

Switzerland

Italy

France

Poland

Market by

Boiler Types	Heat Output	Business Segments	Customer Segments	Distribution Channels
Wood Log	Up to 15Kw	New Construction	Residential	2-staged Distribution
Pellet	Between 16 - 25Kw	Renovation / Replacement	Non-Residential	3+-staged Distribution
Wood Chip	Between 26 - 50Kw			
Combination (Pellet / Wood Log)	Between 51 - 100Kw			
	Between 101 -300Kw			
	More than 300Kw			

Total Market Analysis and Forecasts from 2021 – 2027f for all Segments and Competition Analysis for the Top Companies with Market Shares Overall and by Boiler Types and Heat Output for 2023/24e

Market Structure - Interpretation

IC Market Tracking® Heating Biomass Boilers Europe Top 6 2024

Germany

Austria

Switzerland

Italy

France

Poland

Market by

Boiler Types	Heat Output	Business Segments	Customer Segments	Distribution Channels
Wood Log	Up to 15Kw	New Construction	Residential	2-staged Distribution
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	Between 101 - 300Kw			
	More than 300Kw			

- Market data which include the market development is available for each country separately as well as aggregated for the region package purchased.
- Each country report includes data for four different boiler types (Pellet, Wood Chip, Wood Log and Combination) separately as well as aggregated for the total market of Biomass Boilers in terms of value and quantity.
- Each region report includes data for the Heat Output, Business Segments, Customer Segments and Distribution Channels separately as well as aggregated for the total market in terms of quantity.
- Competition Analysis: Market shares of the top companies in the competition analysis are shown for the total market in value and quantity and as well by Boiler Type and by Heat Output for each of the sub-segments mentioned

Definitions I

Boiler Type

The Boiler types don't include CHP Boilers or any power generating Boiler.

Pellet Boiler

A boiler system that uses Pellet as fuel source.

Wood Chip Boiler

A boiler system that uses Wood Chip as fuel source.

Wood Log Boiler

A boiler system that uses Wood Log as fuel source.

Combination (Pellet / Wood Log)

A boiler system that uses a combination of Pellet and Wood as fuel source.



Definitions II

Heat Output

Up to 15 Kw

Boilers that produce a heat output of up to 15 Kw

Between 16-25 Kw

Boilers that produce a heat output of between 16 - 25 Kw

Between 26-50 Kw

Boilers that produce a heat output of between 26 - 50 Kw

Between 51-100 Kw

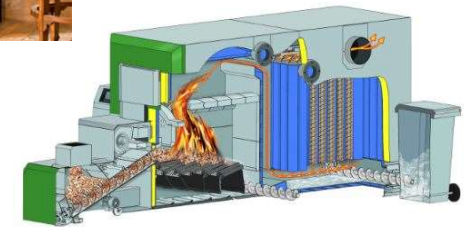
Boilers that produce a heat output of between 51 - 100 Kw

Between 101-300 Kw

Boilers that produce a heat output of between 101 - 300 Kw

More than 300 Kw

Boilers that produce a heat output of more than 300 Kw



Definitions III

Business Segments

New Construction

Use in new buildings

Renovation /
Replacement

Use in existing buildings

Distribution Channels

2-staged Distribution

Sales to installers who sell Heating Biomass Boilers to the end user.

3+-staged Distribution

All forms of trade in which Heating Biomass Boilers are bought and sold by at least two intermediaries.

Customer Segments

Residential

Building for apartments; detached and family houses

Non-Residential

Buildings for commercial purposes such as offices, shotels etc.

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!”

Content of the Report

Overview of the Included Dashboards

TOTAL MARKET

- Total Market – Country Comparison
- Total Market Development by Countries

BOILER SYSTEM TYPES

- Regional Market Development by Boiler System Types in Terms of Value and Quantity (in absolute figures and percent)

HEAT OUTPUT

- Regional Market Development by Heat Output in Terms of Quantity (in absolute figures and percent)

BUSINESS SEGMENTS

- Regional Market Development by Business Segments in Terms of Quantity (in absolute figures and percent)

CUSTOMER SEGMENTS

- Regional Market Development by Business Segments in Terms of Quantity (in absolute figures and percent)

DISTRIBUTION CHANNEL

- Regional Market Development by Distribution Channels in Terms of Quantity (in absolute figures and percent)

COMPETITION ANALYSIS

- Market shares of the top players for 2023/24e
- Market Shares on the total market in Value and Quantity
- Market shares by Boiler Types and Heat Output

MARKET DRIVERS

- Economic Indicators (Real GDP Change, Inflation, Recorded Unemployment)
- Construction Overview by Countries

Investment Plan for Your Market Research

	Subscription *	Single Issue
Single Country	€ 3,999.-	+25% for Single Issues
TOTAL MARKET REPORT - 6 Countries	€ 18,999.-	

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The license costs for Tableau Cockpit Software are included from an order value of € 5,000 (net) and with every order for an annual subscription for more than 2 countries or regions. For all other options, the price for the Tableau Cockpit is € 500 / license.

Chosen References

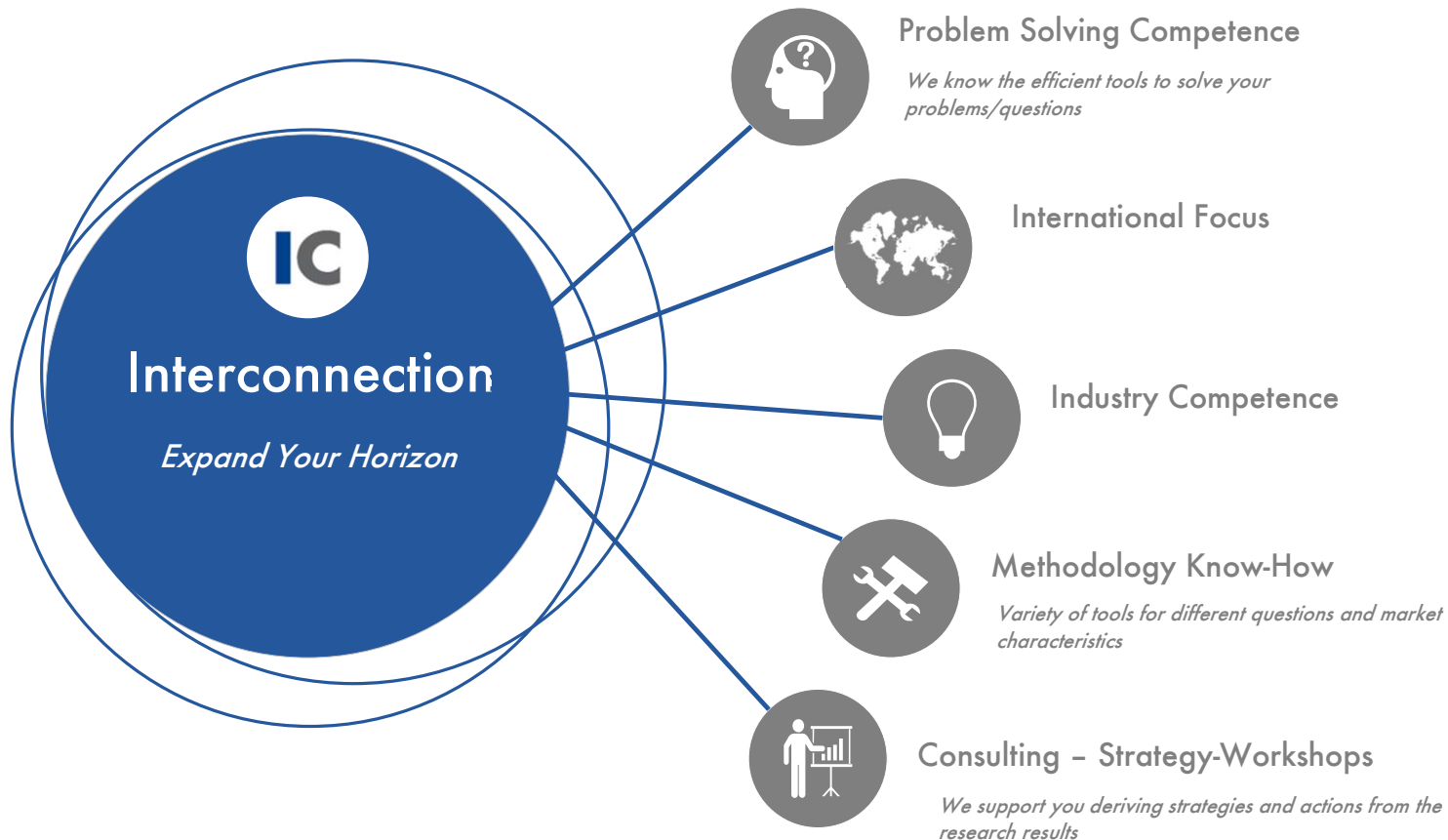
"IC is a permanent partner of ours and provides helpful data for decisions."

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



Interconnection Provides Data for Corporate Decisions



Our Market-Intelligence Tools





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Defining Growth Potential since 1998

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