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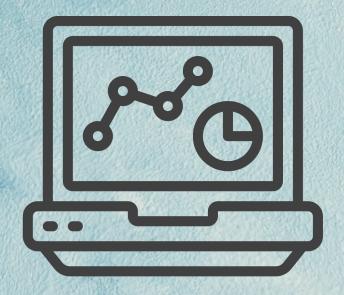
Eurovent Market Intelligence

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PRESENTATION OF EUROVENT MARKET INTELLIGENCE

30 MAY 2022





Methodology & Online Database

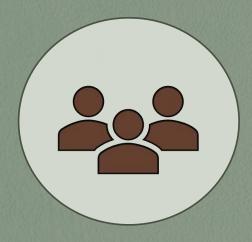
Who are we?



Eurovent Market Intelligence (EMI) is a European Statistics Office on the HVAC&R market, and it provides key market data. The guiding principle of EMI is to establish a detailed map of the European market with the participation of the manufacturers in the data collections.

28 YEARS

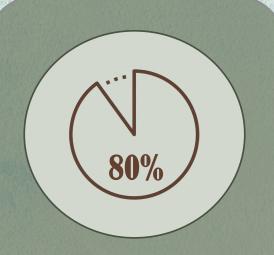
In the sector since 1994



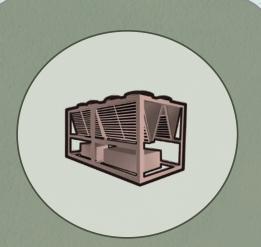
More than 400 participants



More than 50 countries worldwide



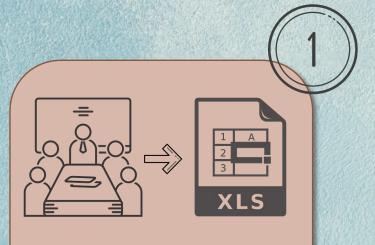
About 80% of market coverage



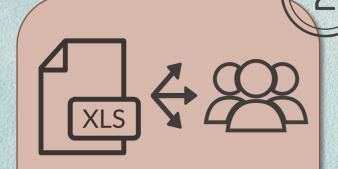
18 different
HVAC-R product
groups

Methodology





EMI builds a collection format by collaborating with the interested manufacturers (for new collections only)



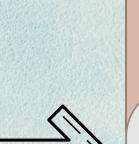
At the beginning of the year, EMI sends the collection format to each manufacturer in order to be filled with their annual sales

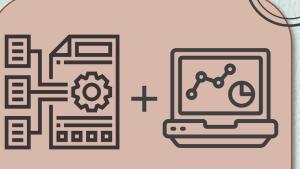


Each manufacturer fills in the format with their annual sales data and sends it back to EMI (strictly

confidential)

CONFIDENTIAL





EMI provides
aggregated results
through an online
database to all
participants in
March, and total
market estimation
report in April

Type of results



WHICH INFORMATION ARE RECEIVED BY PARTICIPATING IN THE STATISTICS COLLECTIONS?



COLLECTED &
AGGREGATED
SALES VOLUME



ESTIMATED TOTAL MARKET



YOUR MARKET SHARE



YOUR RANK



YEARLY MARKET EVOLUTION



QUALITATIVE REPORT*

*Participation in a short qualitative survey is required

IN DETAILED CATEGORIES:



MARKET BY COUNTRY



MARKET BY CAPACITY



MARKET BY TECHNOLOGY



MARKET BY ENERGY CLASS



MARKET BY APPLICATION



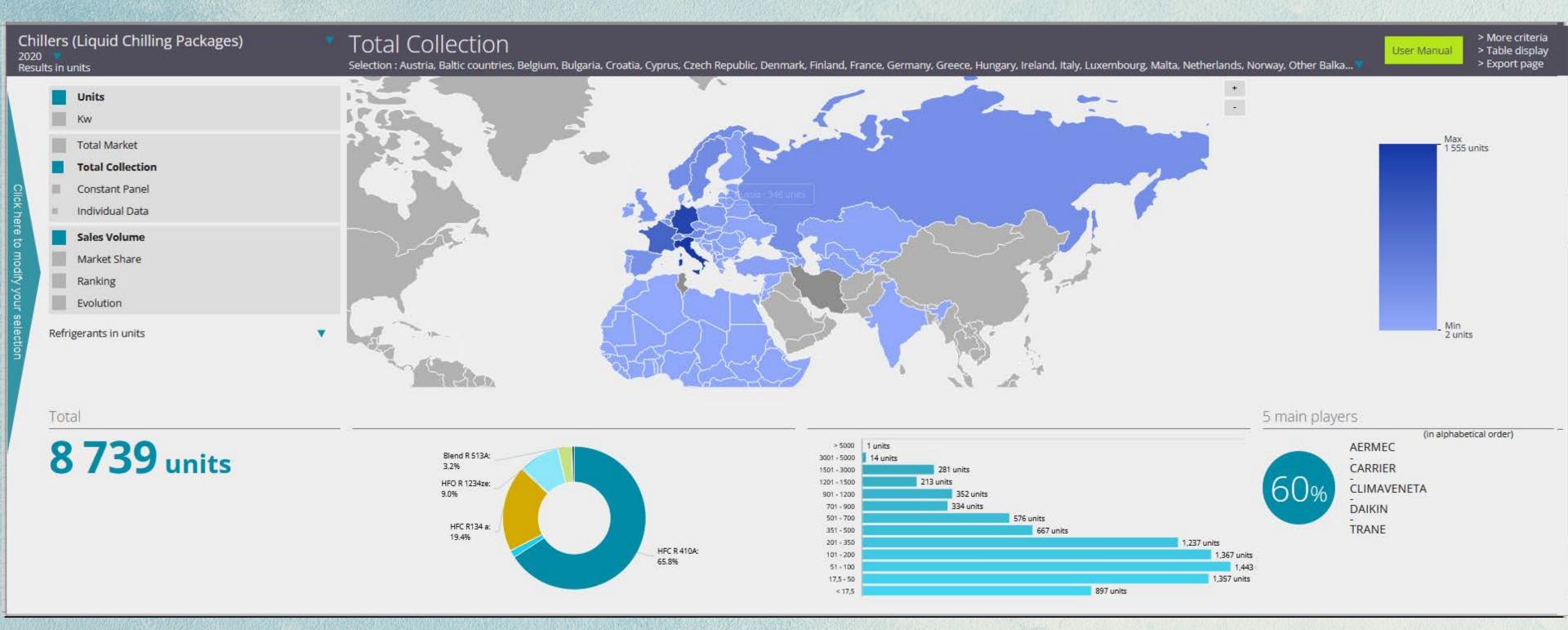
2 FREE REPORTS*

*On products that you don't sell.

Online database



Results are mainly available through our online database under private access (login and double password)



Confidentiality



- Confidentiality is the vital basis of the activity
 - The activity of EMI competely complies with the European competition law rules
 - Eurovent Market Intelligence may be held liable from unintended disclosure to any third party including other Eurovent entities
- Additional measures are taken to ensure the individual data confidentiality in the results.

We do not deliver results if:

- there are less than 3 manufacturers per country and segment
- an individual market share is more than 50% in the collection
- the representativeness of the collection is too weak



Benefits

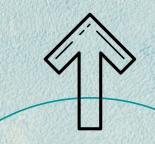


GET A CLEAR
VIEW OF THE
HVAC-R
MARKET



- Market size
- Market segmentation

- Market concentration
- Market trends and forecasts



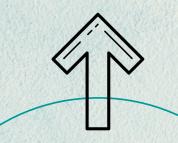
HIGHLIGHT
NEW BUSINESS
DEVELOPMENT
OPPORTUNITIES

IDENTIFY YOUR
STRENGTHS &
WEAKNESSES
AND TOP
COMPETITORS



- Personalized reports
- Personal market share and rank
- TOP5 manufacturers

- In the framework of new energy saving regulations
- EU27 segmentation



PROVIDE MARKET
FIGURES TO SUPPORT
THE WORK AND
EXCHANGES WITH
AUTHORITIES

Market Intelligence Committee



- Market Intelligence Committee is consisting of a meeting with the participants of the collections.
- It is held twice a year in a pre-selected location in Europe (Paris, Rome, Berlin, Krakow, etc. in the past). Since the covid-19 crisis, the committees are held online.
- The main purpose is to gather all our participants to hear their proposals on the collections, making decisions by vote, and getting their feedback; as our collections are the results of this collaboration with the manufacturers.
- It is also a way for us to present a summary on our activity during the year, as well as new development projects.
- Overall, it is a great opportunity to keep in touch with all our participants!



Annual Collections



Annual Collections 2022

- Adiabatic and Hybrid Heat Rejection
- > Air Curtains
- > Air Filters
- Air Handling Units
- **▶** CO2 Refrigeration Systems
- Domestic Heat Pumps
- > Fan Coil Units
- Chilled Beams
- Liquid Chilling Packages

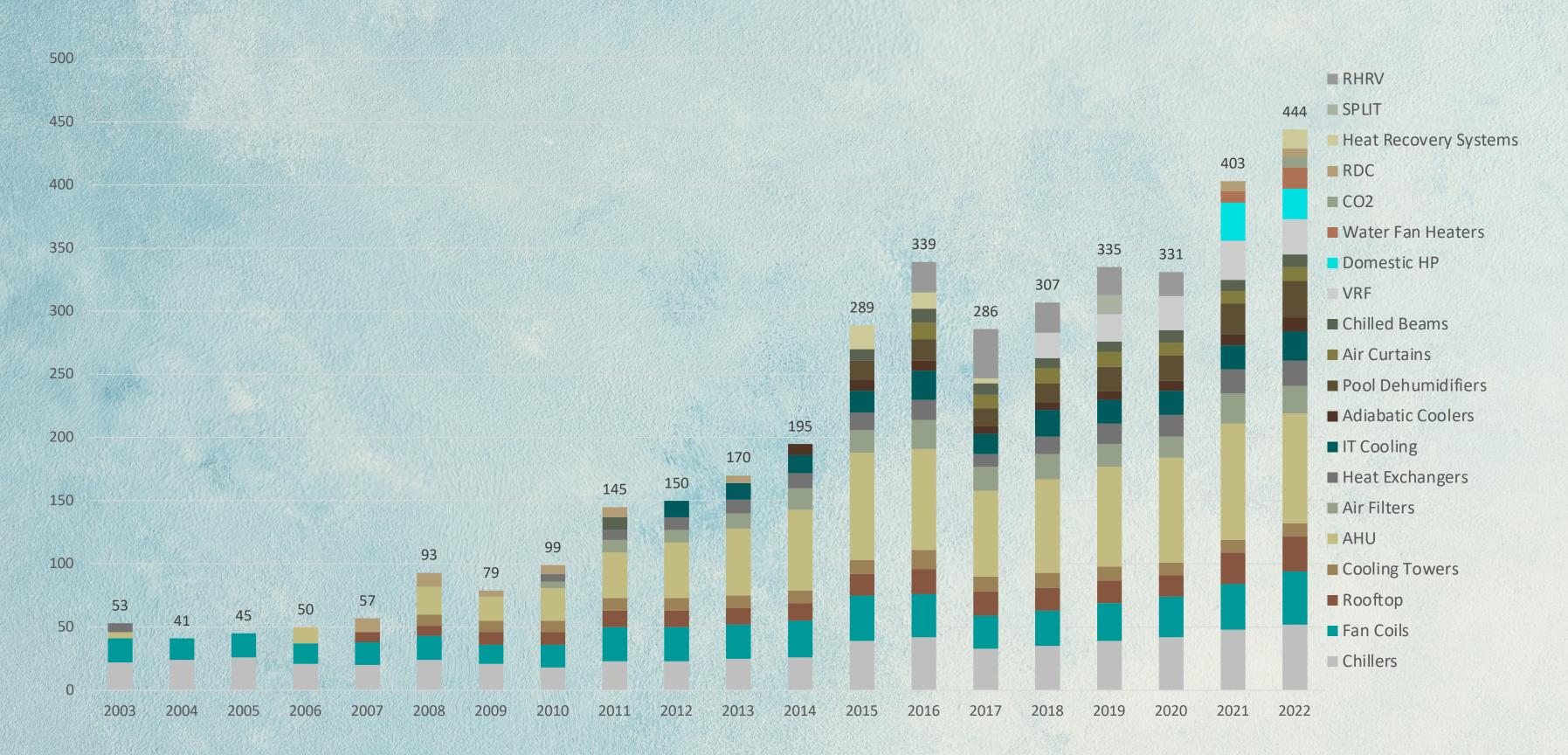
- Cooling Towers
- Heat Exchangers
- ➤ Heat Recovery Systems
- > IT Cooling
- Pool Dehumidifiers
- Rooftops
- Refrigerated Display Cabinets
- > VRF
- Water Fan Heaters

First participation in any collection is free for all manufacturers

Eurovent certified companies can join in the corresponding collection for free

Annual Collections – number of participants





Thank you for participating!





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