

Report

www.bsria.co.uk

European Market for Chilled Beams / Ceilings Germany

Report 50759/4
December 2007

A multi client study

Compiled by: Katherine Sutter

No. of pages: 28 of text

Appendix: A

Quality Approved: *Anette Meyer Holley*

This report must not be reproduced except in full without the written approval of an executive director of BSRIA. It is only intended to be used within the context described in the text.

BSRIA Limited

Old Bracknell Lane West, Bracknell, Berkshire RG12 7AH UK

T: +44 (0)1344 465600 **F:** +44 (0)1344 465626

E: bsria@bsria.co.uk **W:** www.bsria.co.uk

CONTENTS

1	INTRODUCTION	1
1.1	Products covered.....	1
1.2	Market size measurements.....	1
1.3	Methodology.....	1
1.4	Definitions	2
2	SUMMARY	3
3	MARKET SIZE	5
3.1	Local market trends	6
3.1.1	Market overview	6
3.2	Chilled ceilings	7
3.2.1	Market overview	7
3.2.2	Chilled ceilings market by design of panel.....	8
3.2.3	Dual-purpose panels.....	8
3.2.4	Advantages and disadvantages of the chilled ceiling system.....	9
3.3	Chilled Slabs.....	10
3.3.1	Market overview	10
3.4	Commodity passive and active chilled beams	11
3.4.1	Market overview	11
3.4.2	Dual-purpose panels.....	12
3.4.3	Advantages and disadvantages of chilled beams	12
3.5	Multi-service passive and active chilled beams.....	13
3.5.1	Market overview	13
3.5.2	Dual-purpose panels.....	14
3.6	Comparison with traditional air conditioning systems	15
4	MARKET TRENDS AND FORECAST	16
4.1	Historical trends and Forecast	16
5	MAJOR COMPANIES	18
5.1	Overview	18
5.2	Major supplier's market position.....	19
5.3	Product range of leading suppliers	20
5.4	Foreign trade.....	22
5.4.1	Imports	22
5.4.2	Exports	22
6	DISTRIBUTION AND PRICING	23
6.1	Distribution channels.....	23
6.2	Pricing.....	24
7	TYPICAL APPLICATIONS	25

APPENDICES

APPENDIX: A	SUPPLIER CONTACT DETAILS.....	27
-------------	-------------------------------	----

TABLES

Table 1.1 Interviews undertaken for the study by country.....	2
Table 3.1 Chilled beams/ceilings, market value and volume, 2006.....	5
Table 3.2 The market size for chilled ceilings, 2006.....	7
Table 3.3 German chilled ceiling market, by material used for tile, by % of volume, 2004 – 2010	8
Table 3.4 German chilled ceiling market by function, % of volume, 2006.....	8
Table 3.5 Advantages and disadvantages of chilled ceilings.....	9
Table 3.6 The market size for chilled slabs, 2006.....	10
Table 3.7 The market size for commodity beams, 2006 ¹	11
Table 3.8 The market for multy-service beams, 2006 ¹	13
Table 4.1 Growth of construction output in real terms	16
Table 4.2 Market forecast of the German chilled beam/ceilings market, value (Euro) 2004 – 2010 ..	16
Table 5.1 Chilled beams/ceilings suppliers in Germany, market share by value, 2006.....	19
Table 5.2 Product range of suppliers of chilled beams/ceilings.....	20
Table 5.3 Chilled beams/ceilings market, balance of trade analysis, by value (Euro), 2006.....	22
Table 6.1 Distribution channels, by value %, 2006	23
Table 7.1 Typical applications, % of total installations in value terms, 2006	25
Table 7.2 Typical applications, % of total installations in value terms, 2006	25

FIGURES

Figure 2.1 Overview of German chilled beams/ceilings market, by product, by value (%), 2006.....	3
Figure 3.1 Air conditioning market by product type, % by value, 2006.....	15
Figure 4.1 Historical and future trends for chilled beams/ceilings by market value, 2004 – 2010.....	17
Figure 6.1 Distribution channels, by product, by % of sales value, 2006.....	24