European Mechanical Installation Monitor Q3 2024

Prefab

November 2024

A product by USP Marketing Consultancy

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About European Mechanical Installation Monitor

THE GOAL

To check and track the behaviour and trends in the European Mechanical installation market. This is done 4 times per year, by means of around 700 phone interviews (per quarter) with registered HVAC installation companies and plumbers, divided over 6 major European markets.

THE RESEARCH TOPICS

Fixed part: Economic developments of the installation companies in Europe (order book and turnover development)

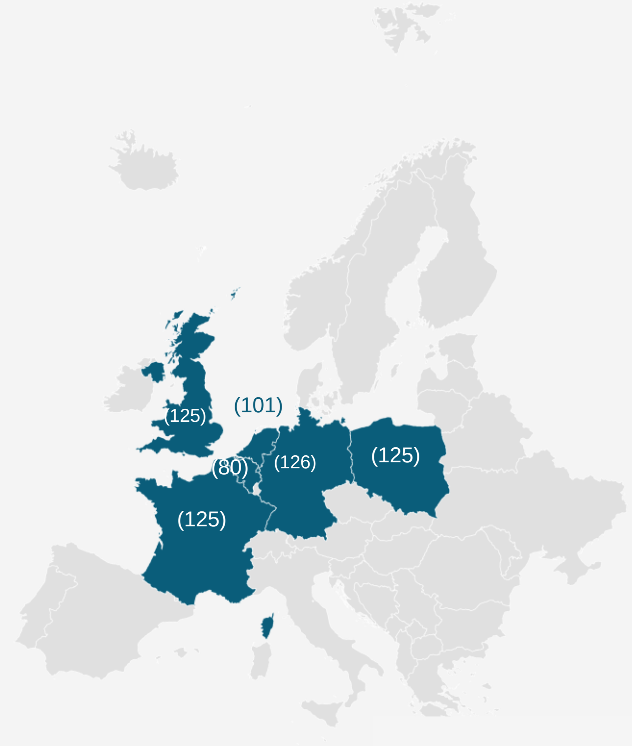
Quarterly theme topics in 2024:
Q1: BIM
Q2: Smart and connected products
Q3: Prefab
Q4: Media orientation

THE TIMELINE

Report Q1	Report Q2	Report Q3	Report Q4
May 2024	August 2024	November 2024	February 2025

COUNTRY SCOPE

Background characteristics of the interviewed respondents can be found in the appendix



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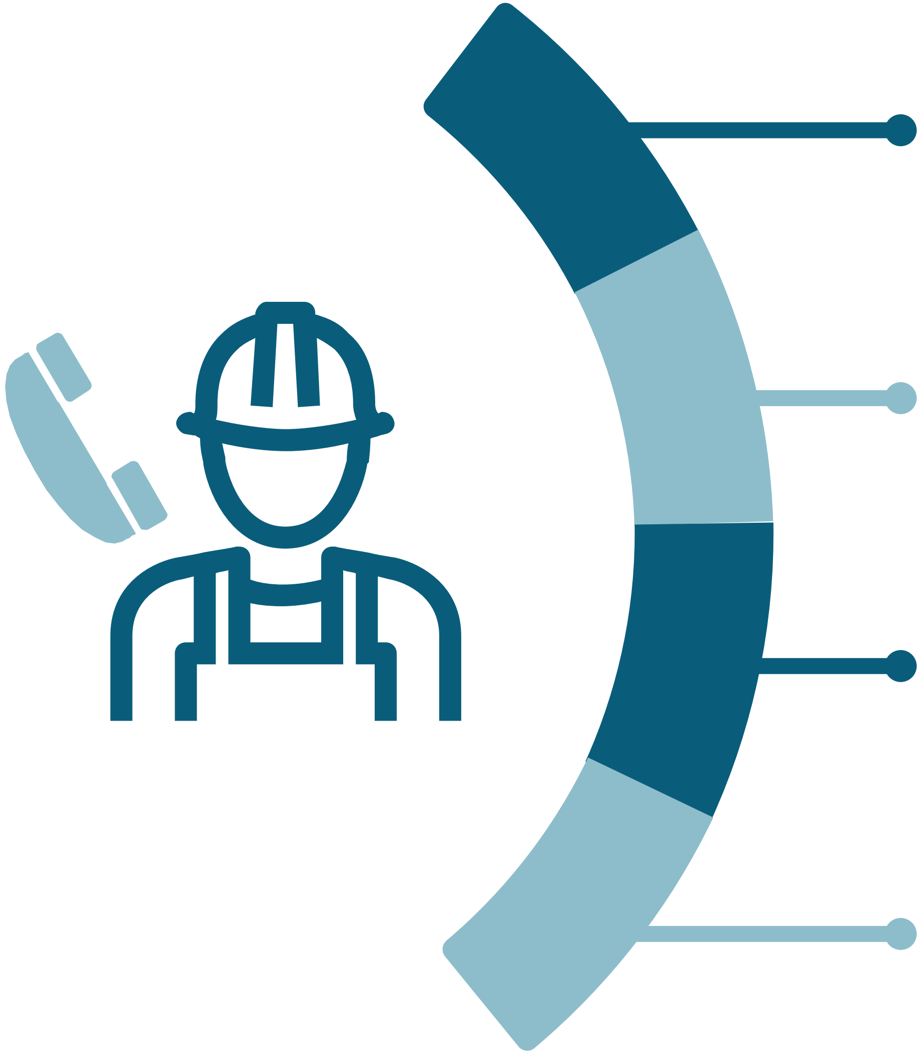
About target group & methodology



Surveying HVAC installation companies…

Interviewed companies need to provide HVAC installation services, but they may also do other activities in addition (Electrical installation etc.). Most interviews are conducted with owners/ directors or purchasers of these companies.

… selected from a country-representative database

USP possesses an international database of HVAC installation companies, which is constantly updated. Respondents are thus not part of a fixed panel; the sample varies from wave to wave.

… through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient number of interviews, in order to provide insights that can be relied on. These phone interviews are conducted by fixed fieldwork partners, located in the respective countries.

… weighting the results based on company size groups

Country results are weighted so that all three company size groups* have an equal influence on the total. As most interviews are typically conducted with small companies, we believe it is important to correct in order for large companies to have an equal impact on the 'total' results. This way the results are not heavily influenced by many smaller companies.

* **Group 1**: 1-4 FTE; **Group 2**: 5-14 FTE; **Group 3**: 15+ FTE

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About the Q3 theme topic

Surveying the Prefab topic…

Prefab is a hot topic for the installation sector and manufacturers are wondering what type of prefab products and services they need to offer. Talking about prefab, however, is very difficult, because one can always ask the question: What is prefab? And how do you define prefab when it comes to plumbing and HVAC installations?

To make sure that installers in this survey had the same things in mind when we talked about prefab, we offered them the following definition that was aligned with our clients:

"By prefab or prefabrication of the installation elements or systems we mean the process in which the separate products are combined into elements in a factory or workshop before they are transported to the construction site and processed there. The prefabrication in the installation sector can be related to any part of the water, heating, cooling and ventilation installations in a building.

When talking about prefab products, solutions, services and combinations of prefab elements, we generally mean the following:

Prefab services - design, bundling of products or cut-to-length pipes

Prefabricated/ preassembled products for wastewater, hot and cold water, indoor climate, pump groups, heat interface units, manifolds for underfloor heating, etc.

Prefabricated solutions, such as complete bathrooms, boiler rooms, technical shafts etc.

A combination of prefabricated elements that differs per installation type – for example, water supply and water drain, sanitary and electricity, etc.

…facilitates faster installation and improved project quality

To provide the necessary insights, we covered the following topics:

- Installers' involvement and needs regarding prefabricated plumbing & HVAC products and solutions
- Development and adoption of prefabricated components
- Most needed prefab services;
- Installers' opinions and attitudes toward the adoption of prefab

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Key takeaways

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Business Development

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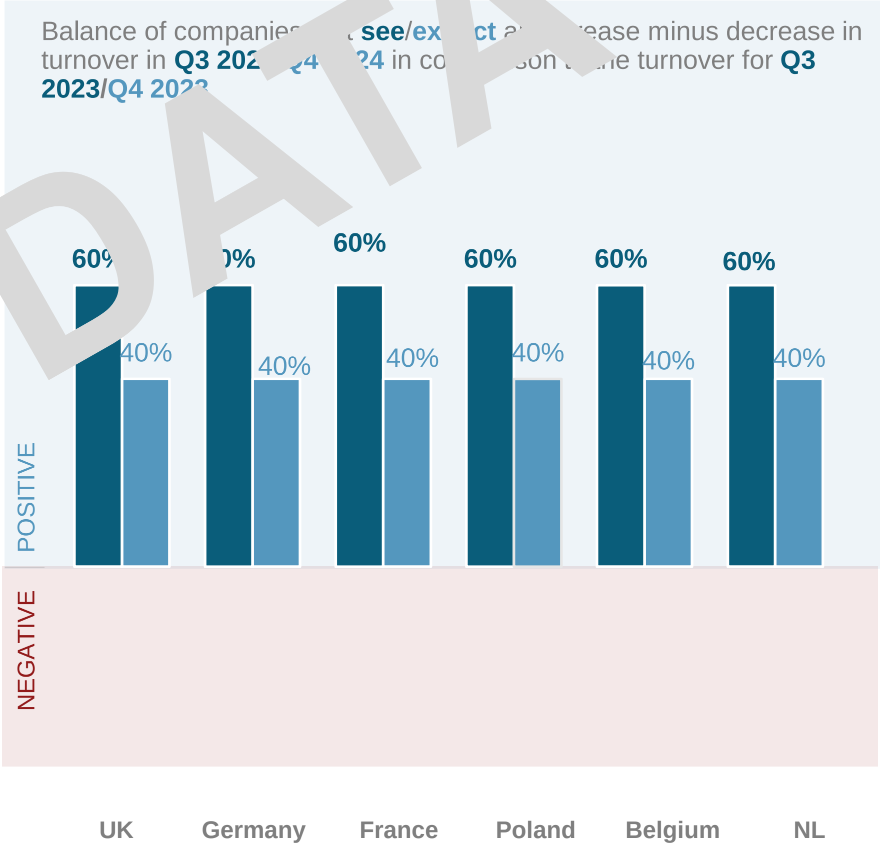
Turnover balance of installers Q3 2024 and Q4 2024



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Key takeaways

Prefab

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Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*125*	[illegible]	[illegible]	[illegible]	*80*	*100*
Heating installations	50%	50%	50%	50%	50%	50%
Hot & cold water installation	50%	50%	50%	50%	50%	50%
Installation of sanitary wa[illegible]	50%	[illegible]	50%	50%	50%	50%
Heat pumps	[illegible]	50%	50%	50%	50%	50%
Ventilation	[illegible]	50%	50%	50%	50%	50%
Air conditioning and cooling	50%	50%	50%	50%	50%	50%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*125*	*125*	*125*	*125*	*80*	*100*
Solar cell, solar collectors	50%	50%	50%	50%	50%	50%
Electrical installation	50%	50%	50%	50%	50%	50%
Home automation installation	50%	50%	50%	50%	50%	50%

Core HVAC activities		Per company size 1-4 FTE	5-14 FTE	15+ FTE
Heating installations	40%	33%	34%	33%
Hot & cold water installation	40%	33%	34%	33%
Installation of sanitary ware	40%	33%	34%	33%
Heat pumps	40%	33%	34%	33%
Ventilation	40%	33%	34%	33%
Air conditioning and cooling	40%	33%	34%	33%

Other activities		Per company size 1-4 FTE	5-14 FTE	15+ FTE
Home automation installations	40%	33%	34%	33%
Electrical installations	40%	33%	34%	33%
Solar cell, solar collectors	40%	33%	34%	33%

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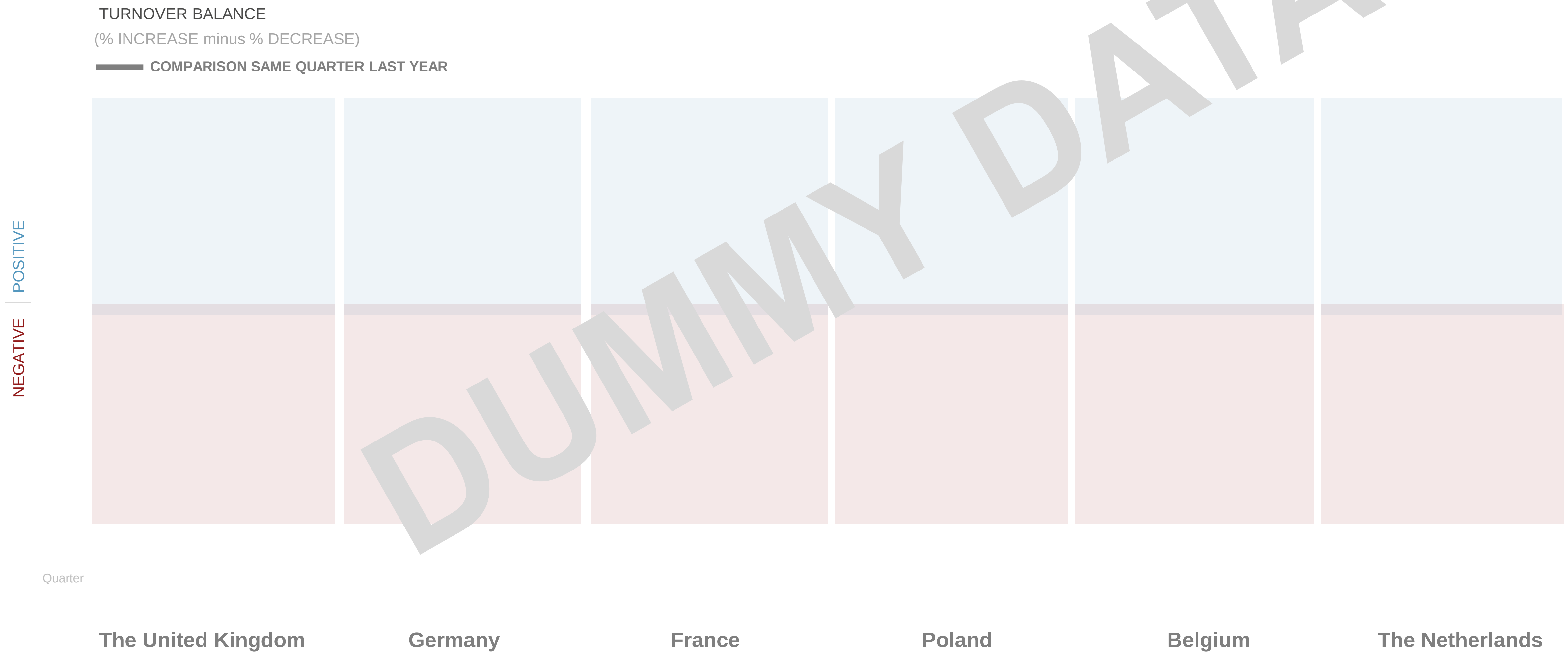
Turnover outlook last quarters and expectations for Q3 2024



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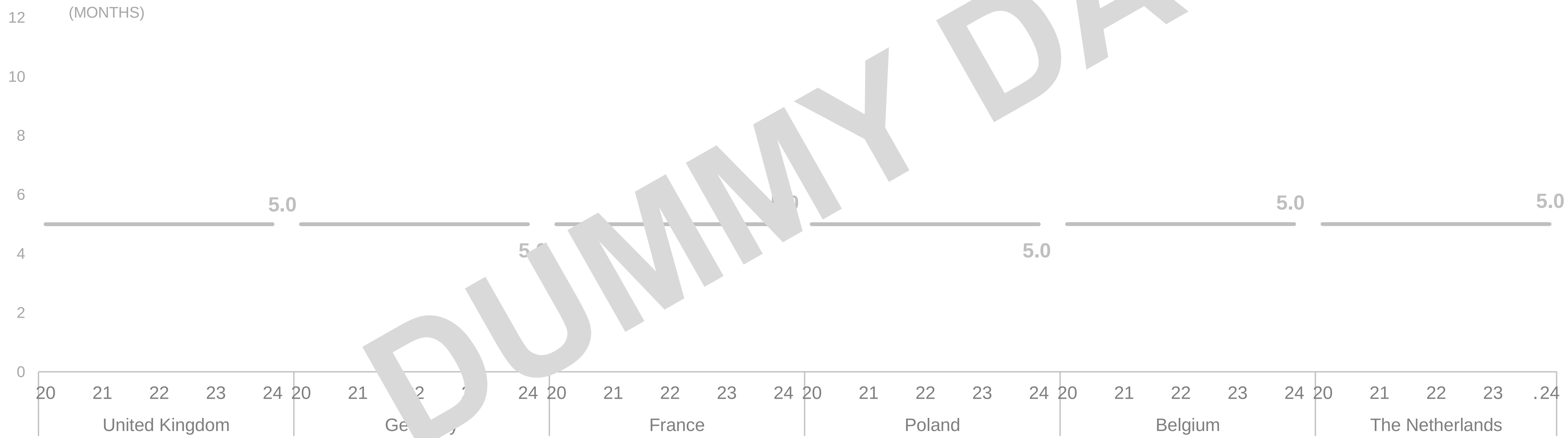
Order book portfolio

How big is your current order book portfolio? For how many months will you be able to keep your current staff working?



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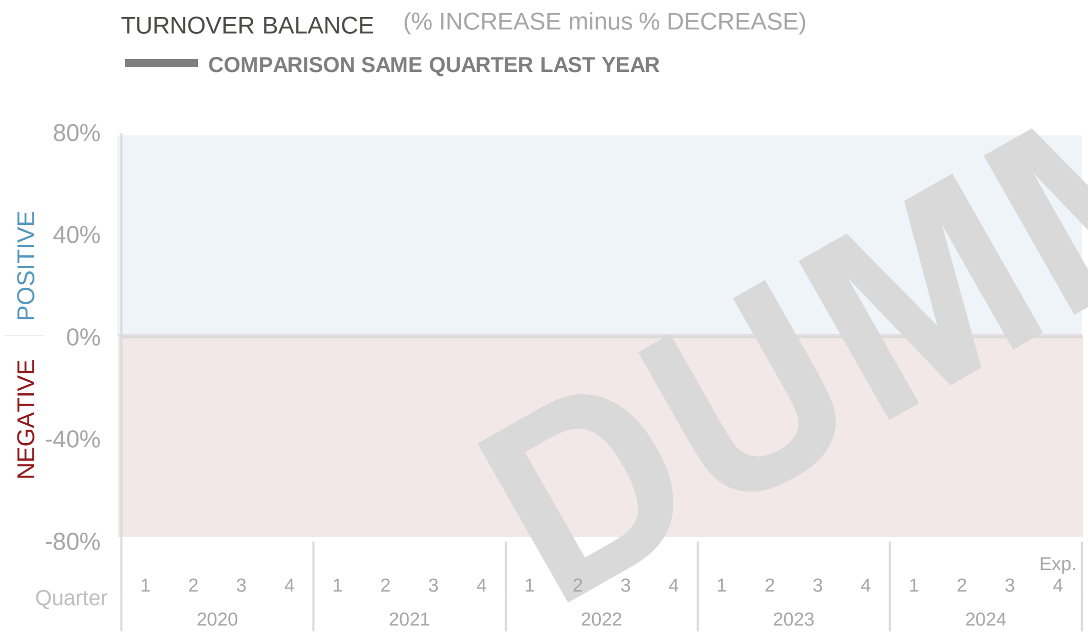
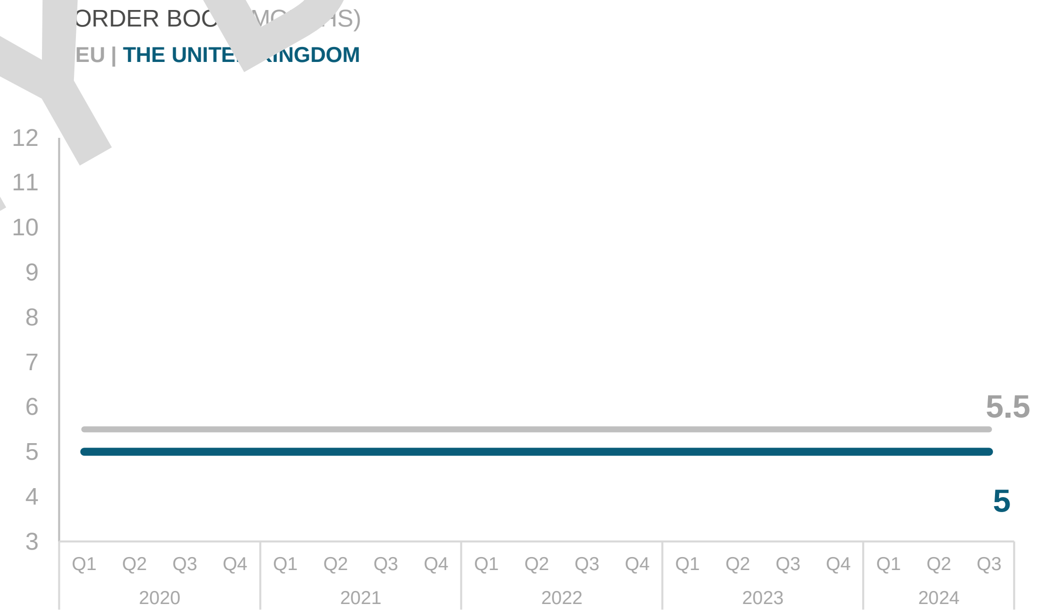
Turnover outlook

If you compare your turnover of Q3-24 to Q3-23, how did your turnover develop?
What are your expectations for the development in Q4-24?



Order book portfolio

How big is your current order book portfolio?



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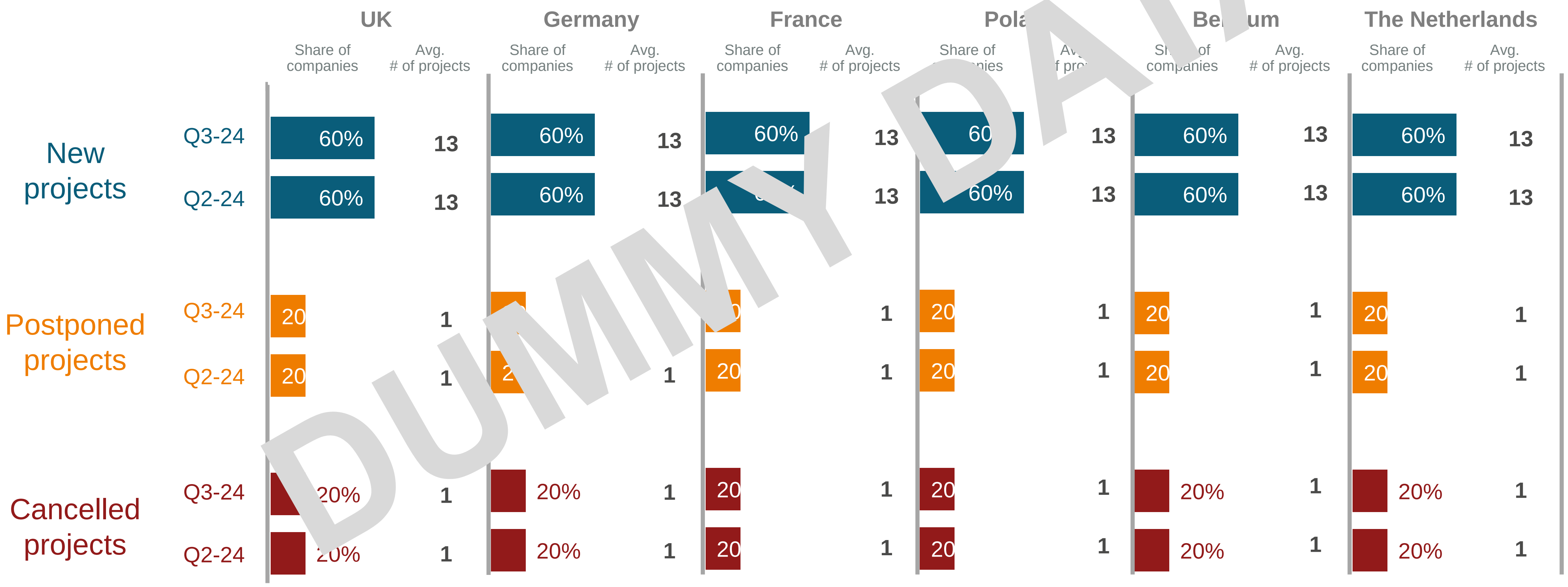
Number of projects in Q3 2024

How many new projects has your company scored/ been commissioned in Q3 2024? How many projects have been postponed in Q3 2024? In Q3 2024, how many projects were not started and cancelled?



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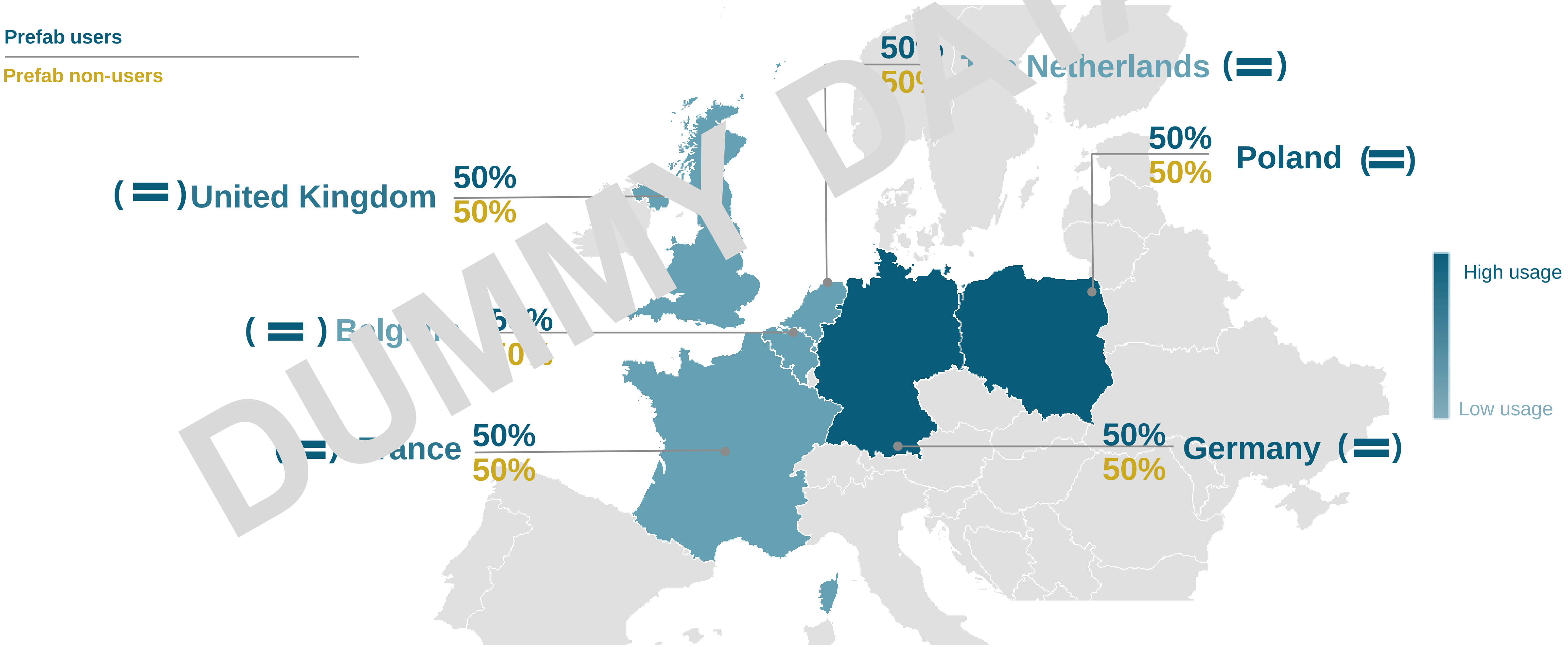
Prefab distribution among HVAC installers & plumbers in Europe



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Prefab users and non-users by company size

Company size
(in full-time employees)

Up to 4 FTE | 5-14 FTE | ≥15 FTE

Prefab user

Prefab non-users

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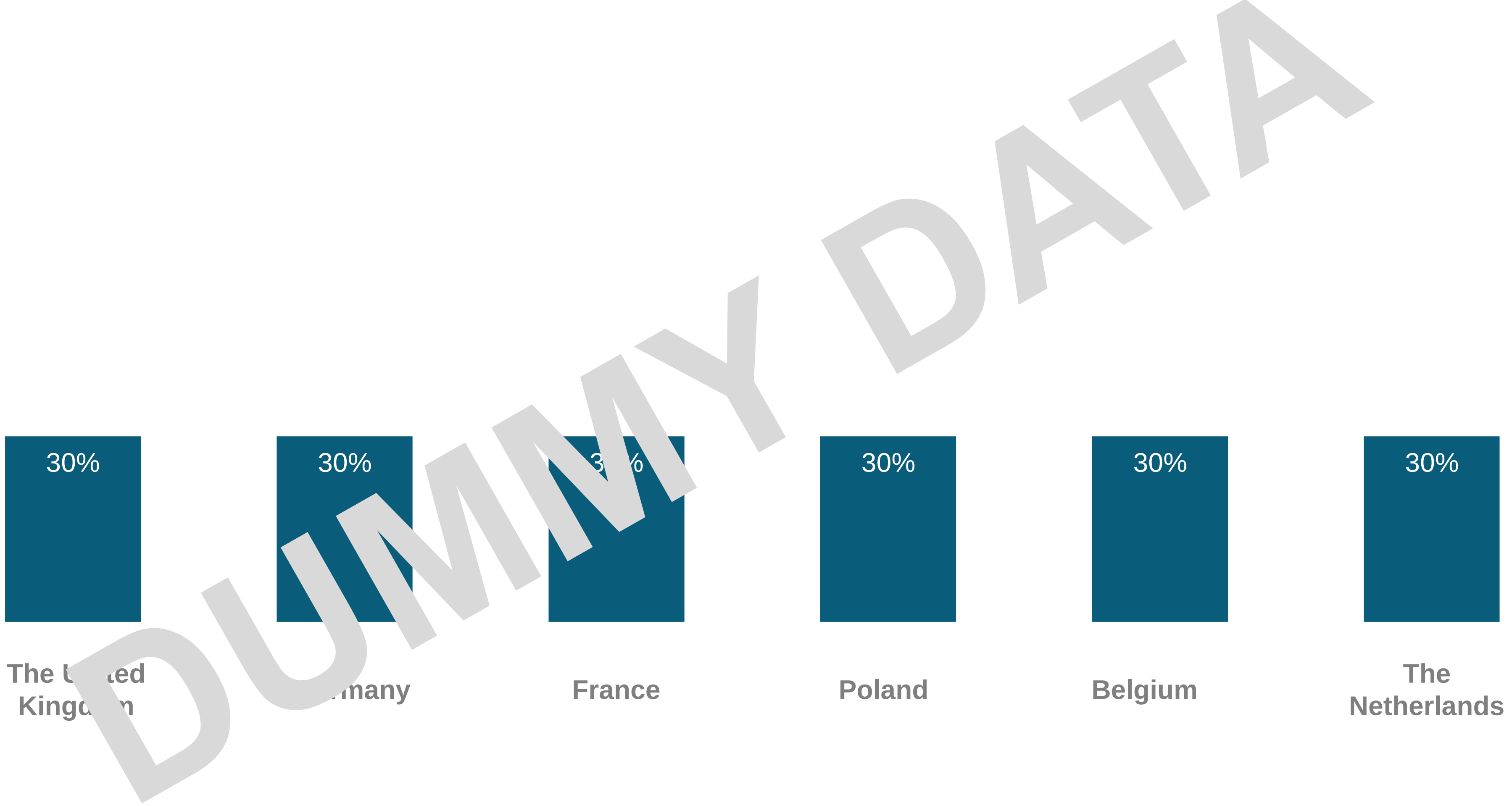
Share of companies having their own workshop or a production location



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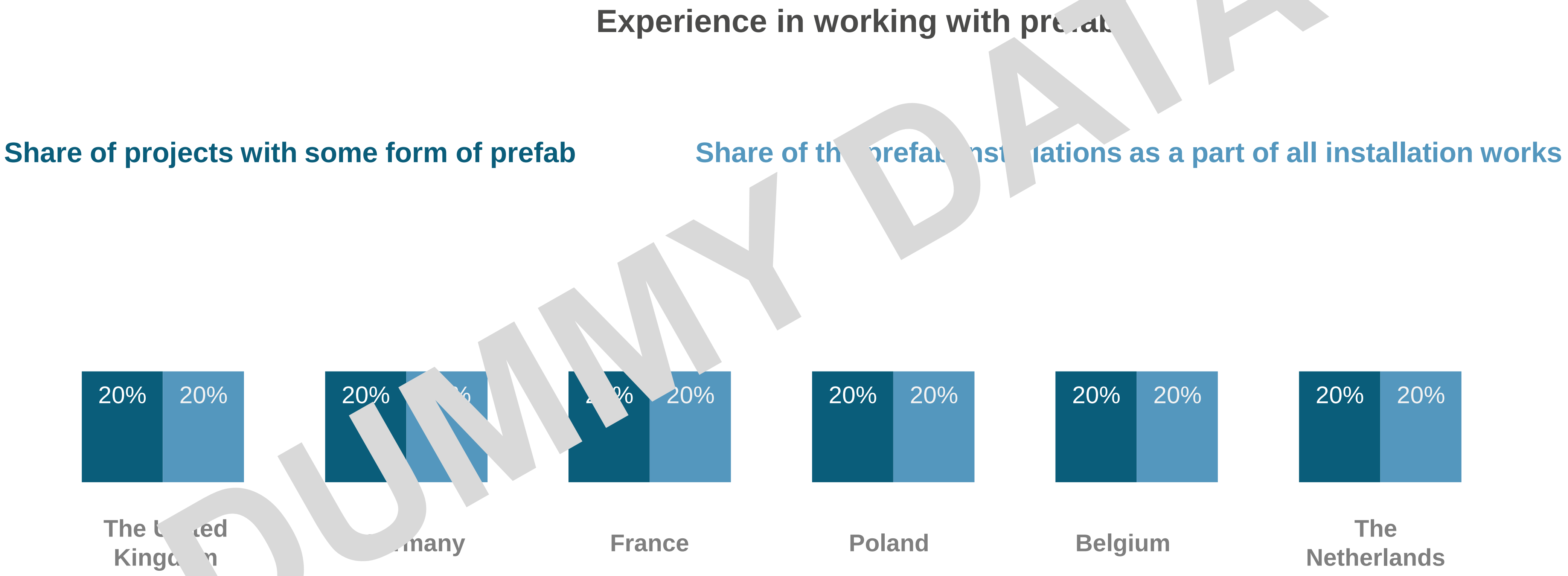

Asked to all prefab users

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Dealing with prefabrication

	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Purchase prefab products/solutions **from wholesalers**	20%	20%	[illegible]	20%	20%	20%
Prefab yourself – buy and preassemble the separate products	20%	[illegible]	20%	20%	20%	20%
Purchase prefab products/solutions **from manufacturers**	[illegible]	20%	20%	20%	20%	20%
Purchase prefab products/solutions from dedicated/ **specialized prefab suppliers**	[illegible]	20%	20%	20%	20%	20%

Asked to all prefab users

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Areas in which prefab products are used

	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Boilers and boiler rooms	30%	30%	30%	[illegible]	30%	30%
Cooling and air conditioning	30%	30%	30%	30%	30%	30%
Hot water installations	30%	30%	30%	30%	30%	30%
Ventilation	30%	30%	30%	30%	30%	30%
Sanitary/ bathroom installations	30%	30%	30%	30%	30%	30%
Cold water installations	30%	30%	30%	30%	30%	30%
Underfloor heating	30%	30%	30%	30%	30%	30%
Waste water installations	30%	30%	30%	30%	30%	30%
Radiant heating installations	30%	30%	30%	30%	30%	30%
Electrical installations	30%	30%	30%	30%	30%	30%
Complete bathroom pods	30%	30%	30%	30%	30%	30%
Riser shafts	30%	30%	30%	30%	30%	30%

Asked to all prefab users

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Types of buildings where prefab products were used

	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands
1-2 family houses / detached houses	30%	30%	30%	30%	30%	30%
Multifamily houses / apartment blocks	30%	30%	30%	30%	30%	30%
Terraced / row-houses	30%	30%	30%	30%	30%	30%
Semi-detached houses	30%	30%	30%	30%	30%	30%
Offices	30%	30%	30%	30%	30%	30%
Retail buildings / warehouses	30%	30%	30%	30%	30%	30%
Schools / Education	30%	30%	30%	30%	30%	30%
Hotels / hospitality	30%	30%	30%	30%	30%	30%
Hospitals / Healthcare institutions	30%	30%	30%	30%	30%	30%
Nursing homes / Sheltered housing	30%	30%	30%	30%	30%	30%

Asked to all prefab users

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Most important criteria when selecting manufacturers of prefab solutions

	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Quality of products	30%	30%	30%	30%	30%	30%
Price of offered solution	30%	30%	30%	30%	30%	30%
Well known brand	30%	30%	30%	30%	30%	30%
Offered warranties	30%	30%	30%	30%	30%	30%

Asked to all prefab users

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Most interesting products, solutions and services from manufacturers

	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Prefabricated/ preassembled products for waste-water, hot and cold water etc.	30%	30%	30%	30%	30%	30%
Prefabricated solutions, such as bathrooms, boiler rooms, technical shafts etc.	30%	30%	30%	30%	30%	30%
A combination of prefabricated elements that differs per installation types	30%	30%	30%	30%	30%	30%
Prefab services such as design, bundling of products or cut-to-length pipes	30%	30%	30%	30%	30%	30%

Asked to all prefab users

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Distribution users and non-users of prefab

	Up to 4 FTE	5-14 FTE	≥15 FTE
50% Users	50%	50%	50%
50% Non-users	50%	50%	[illegible]

50% **of the prefab users and 10% of the non-users** have their own workshop or a production location where they can prepare, precut, and preassemble installation products.

Base: n=xz, Asked to all

Dealing with prefabricati[illegible]

How is your company de[illegible]ling with p[illegible]fabric[illegible]?

		Up to 4 FTE	5-14 FTE	≥15 FTE
Purchase [illegible]efab p[illegible]duct[illegible] sol[illegible]tions fro[illegible] manu[illegible]tur[illegible]s	30%	33%	34%	33%
[illegible]urchase p[illegible] products/ [illegible]olutions from wholesalers	30%	33%	34%	33%
[illegible]refab yourself – buy and preassemble the separate products	30%	33%	34%	33%
Purchase prefab products/ solutions from dedicated/ specialized prefab suppliers	30%	33%	34%	33%

Prefab installation works are
50% **of the total installation works**

Base: n=xx, Asked to Prefab users

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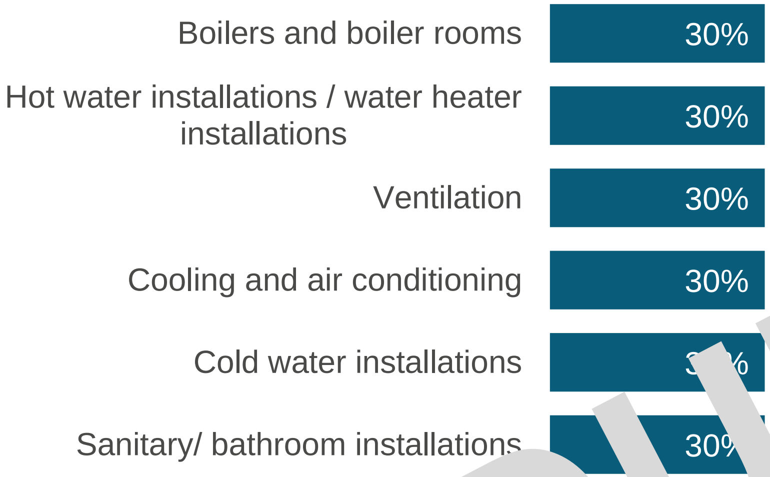
Top 5 areas in which prefab products are used

Can you specify the types of installations for which your prefab products are typically used?



Base: n=xx, Asked to Prefab users

Projects with prefab in the last 2 years

When you look at your projects from the past 2 years, what percentage of your projects contained some form of prefabrication/ off-site installations?

Of the projects have some form of prefab

Has the share of projects that contained some kind of prefabrication or off-site installation increased, decreased or remained the same in the last 2 years?

(Strongly) **increased** | Remained the same | (Strongly) **decreased** | Do not know

Base: n=xx, Asked to Prefab users

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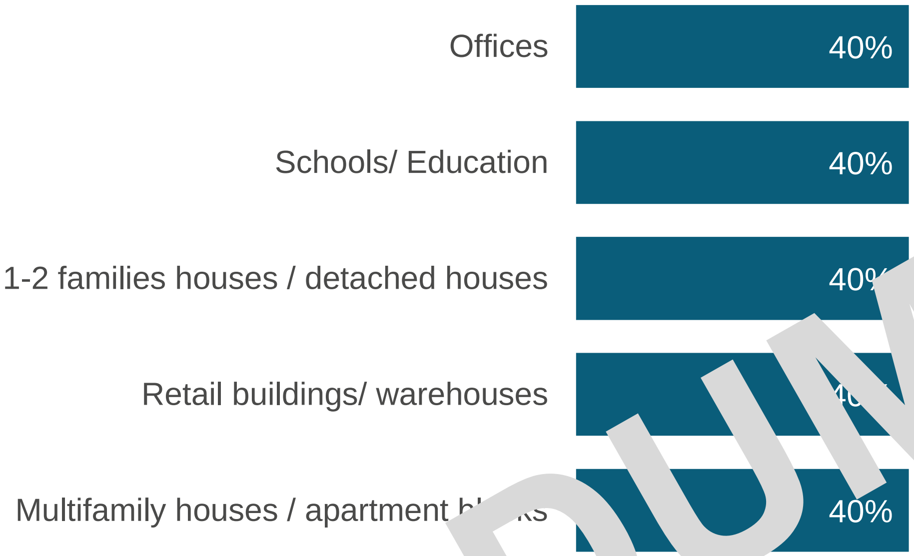
Top 5 types of buildings where prefab products were used

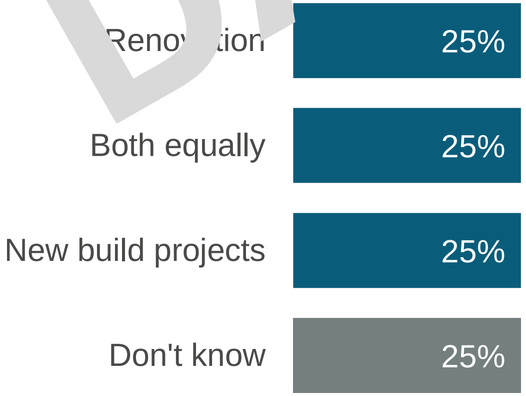
In what type of buildings have you used prefab products/ solutions in the last two years?



Base: n=xx, Asked to Prefab users

Usage of prefab in new-build and renovation projects

Do you use prefab products in new-build projects or renovation projects mainly?



Base: n=xx, Asked to Prefab users

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Most important criteria when selecting manufacturer of prefab solutions (top 5)

What are for you the most important criteria when selecting a manufacturer or supplier of prefabricated solutions?

Quality of products	20%
Price of offered solution	20%
Compatibility/fit of installations	20%
Well known brand	20%
Offered warranties	20%
Reliability	20%

Base: n=xx, Asked to Prefab users

Type of prefab solutions that are most interesting

Which types of prefabricated solutions are you most interested in?

Prefabricated / preassembled products for wastewater, hot and cold water etc.	20%
Prefabricated solutions, such as bathrooms, boiler rooms, technical shafts etc.	20%
Prefab services such as design, bundling of products or cut-to-length pipes	20%
A combination of prefabricated elements that differs per installation type	20%
Other	20%

Base: n=xx, Asked to Prefab users

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50%
Prefab non-users

Main reasons not to work with prefab

What is the main reason for you not to work with prefab products?

Our traditional way of working is good/ fast enough	10%
Small projects/ no repetitive installations/ works	10%
Prefab is not applicable in my line of work	10%
No demand	10%
Prefab doesn't fit for custom work or reconstruction	10%
Prefab products/ solutions are more expensive	10%
I do not trust the prefab products	10%
Enough skilled labor to do everything at the construction site	10%
Other	10%
Don't know	10%

Base: n=xy, Asked to Prefab non-users

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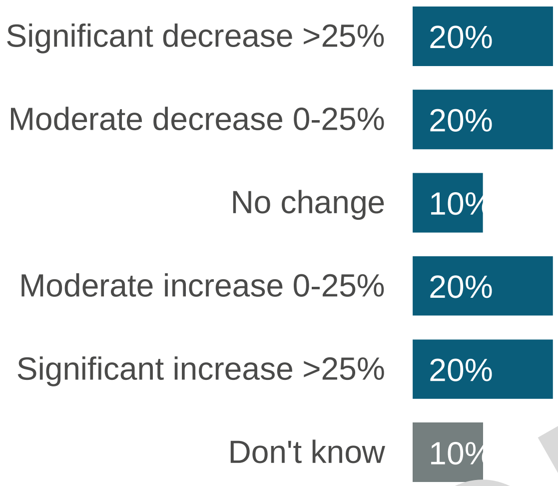
Prefab users

Prefab non-users

Expectations about the development of prefab in the coming 3 to 5 years

What are your expectations for the development of prefabrication in plumbing and HVAC installations over the next 3 to 5 years?



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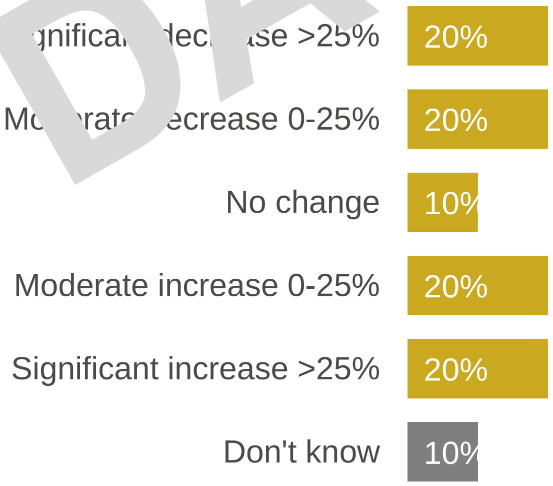

Base: n=xy, Asked to Prefab non-users

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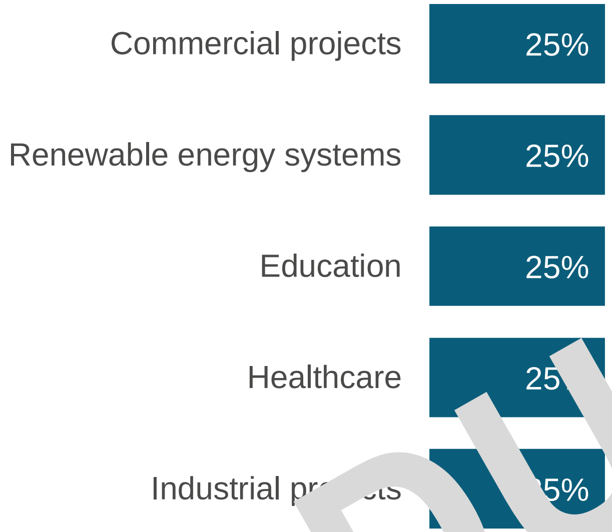
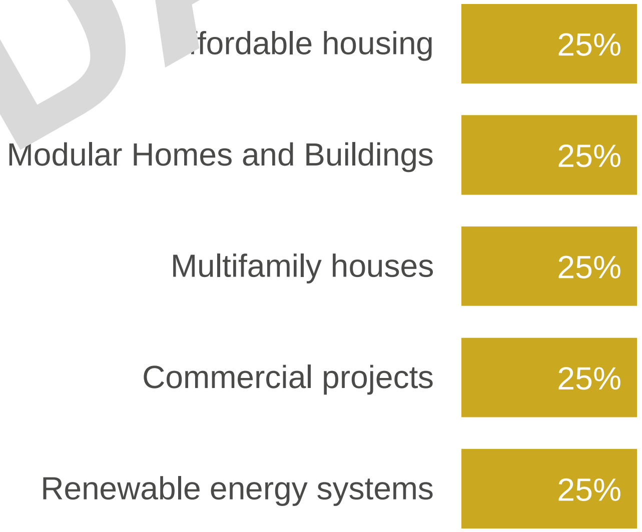
Prefab users

Prefab non-users

Top 5 types of projects in which prefab usage is expected to grow in the future

In which sectors/ areas do you see the greatest potential for prefabrication of plumbing and HVAC installations in the future?





Base: n=xx, Asked to Prefab users

Base: n=xy, Asked to Prefab non-users

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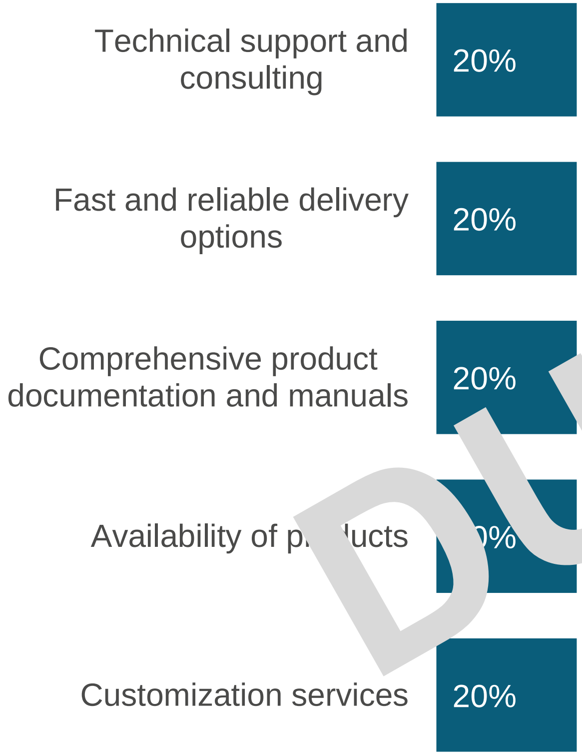
Prefab users

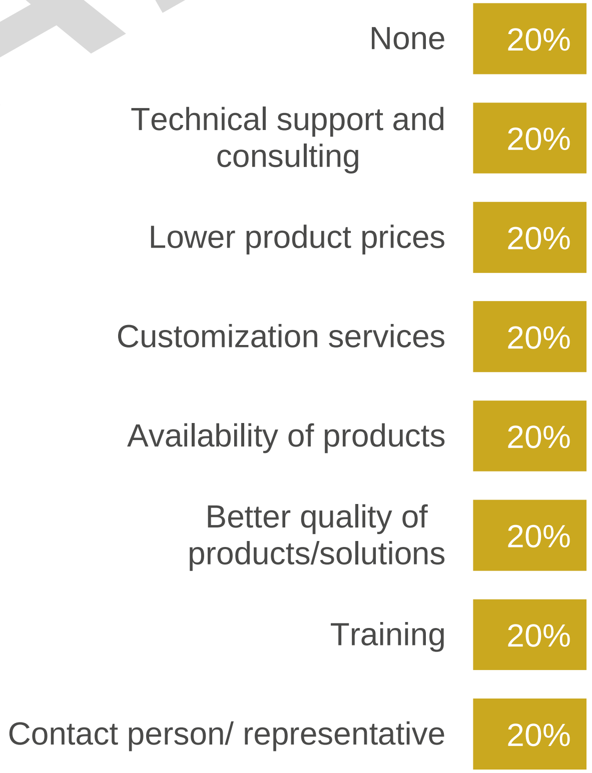
Top 5 services installers need from manufacturers/suppliers

What kind of support or services from manufacturers or suppliers would help you work more effectively with prefab products?



Base: n=xx, Prefab users

Prefab non-users



Base: n=xy, Prefab non-users

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	Prefab users				Prefab non-users			
	(Strongly) agree	Neutral	(Strongly) disagree	Don't know	(Strongly) agree	Neutral	(Strongly) disagree	Don't know
Digitalization in the construction sector will lead to increasing usage of prefab in the installation sector	25%	25%	25%	25%	25%	25%	25%	25%
Prefab reduces the duration of a project (from design to delivery) substantially	25%	25%	25%	25%	25%	25%	25%	25%
Prefab requires a good BIM model	25%	25%	25%	25%	25%	25%	25%	25%
Using prefab elements reduces liability and risks for our company	25%	25%	25%	25%	25%	25%	25%	25%
Prefab is a way to improve the quality of the installation	25%	25%	25%	25%	25%	25%	25%	25%
Prefab limits the freedom of design	25%	25%	25%	25%	25%	25%	25%	25%
Installation skids would help us to speed up the installation process.	25%	25%	25%	25%	25%	25%	25%	25%
[illegible] costs will be reduced to a minimum with prefab	25%	25%	25%	25%	25%	25%	25%	25%
Prefab is worth being used only in projects with repetitive installation such as multifamily housing	25%	25%	25%	25%	25%	25%	25%	25%
Prefab is the best solution for labour shortage	25%	25%	25%	25%	25%	25%	25%	25%
Urbanization is one of the drivers for prefab solutions	25%	25%	25%	25%	25%	25%	25%	25%

Base: n=xx, Asked to Prefab users

Base: n=xy, Asked to Prefab non-users

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Development of supplier structure with broader usage of prefab

Do you expect to buy more, equal or less from each of the following suppliers as a result of prefab?

	Prefab users				Prefab non-users			
	More	Equal	Less	Don't know	More	Equal	Less	Don't know
Manufacturers of installation products	25%	25%	25%	25%	25%	25%	25%	25%
Wholesalers	25%	25%	25%	25%	25%	25%	25%	25%
Online shops	25%	25%	25%	25%	25%	25%	25%	25%
Manufacturers of building products	25%	25%	25%	25%	25%	25%	25%	25%
C-Part suppliers	25%	25%	25%	25%	25%	25%	25%	25%
Other suppliers	25%	25%	25%	25%	25%	25%	25%	25%

Base: n=xx, Asked to Prefab users

Base: n=xy, Asked to Prefab non-users

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Respondents’ background characteristics

Job title of the interviewed respondents and the **company size**

What is your position within the company?

Yourself included, how many full-time employees does your company have in total, in all branches?

	UK	Germany	France	Poland	Belgium	Netherlands
Owner / Director/ Manager	79%	59%	74%	85%	85%	82%
Plumber/ installer	2%	33%	6%	2%	3%	3%
Engineer / designer	2%	0%	4%	2%	1%	0%
Sales	2%	2%	3%	4%	2%	0%
Purchaser	3%	3%	2%	1%	1%	0%
Advisor / consultant	2%	0%	0%	1%	1%	1%
Calculator / Work Planner	1%	0%	5%	0%	2%	6%
Project manager / leader	4%	3%	0%	2%	1%	7%
Other	5%	0%	0%	3%	4%	1%

	UK	Germany	France	Poland	Belgium	Netherlands
1 - 4 FTE	47%	35%	44%	58%	50%	42%
5 - 14 FTE	31%	38%	41%	23%	27%	27%
15+ FTE	22%	27%	15%	19%	23%	30%

Q3 2024 data, unweighted

About USP

USP Marketing Consultancy

Head office
Subsidiaries

Rotterdam
Düsseldorf **Zagreb**

Total
70

Research Analysts
Project managers
Consultants

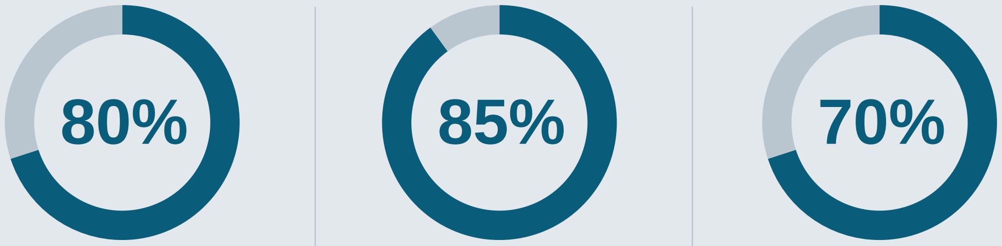
Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

Active in the market for 29 years

250+ dedicated market research projects annually

Revenue distribution



80%
turnover coming from **international projects**

85%
turnover coming from **dedicated market research**, 15% from multi client

70%
turnover coming from **B2B**, 30% B2C

Research in
38
countries in 2023

43
focus groups

1,778
in-depth interviews

60,353
B2B CATI interviews

101,022
B2C online interviews

Single client research

Examples

- Segmentation
- Customer journey
- Branding
- Concept/ product research
- Customer satisfaction
- Trends
- Distribution research
- Market exploration
- Pricing
- Market size

Dedicated market research

- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitive research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time.

multi-client research

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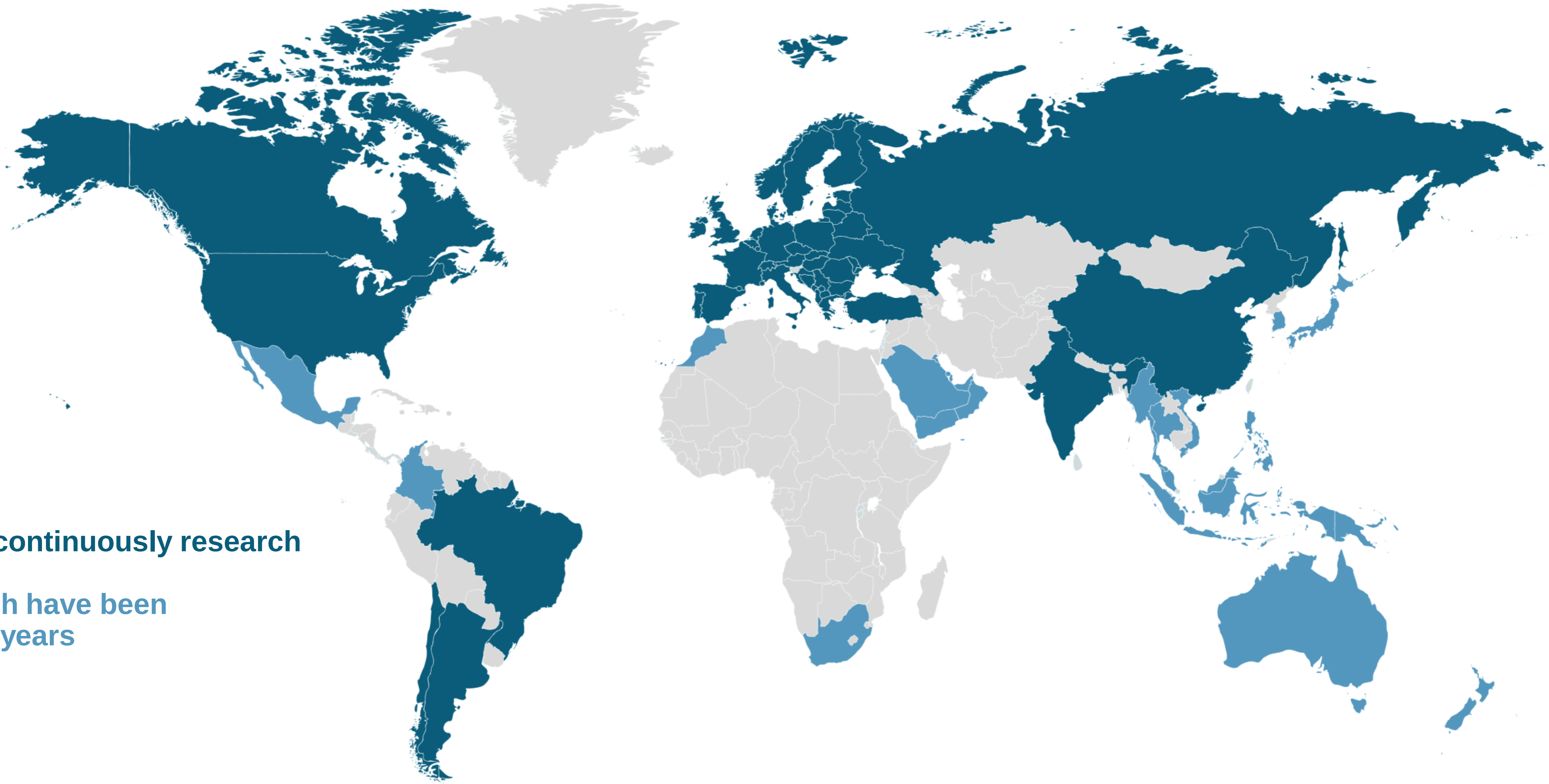
	European **Architectural** Barometer	European **Contractor** Monitor	European **Mechanical Installation** Monitor	European **Electrical Installation** Monitor	European **Painter Insight** Monitor	European **Home Improvement** Monitor	European **Handyman** Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers	Handyman
Methodology							
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews	3,400 interviews
Country scope	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden • Austria	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly	Annually
2024 Theme topics	• Q1: Future of construction • Q2: Trends in material usage • Q3: DMU • Q4: Smart materials and buildings	• H1: Prefab • H2: BIM	• Q1: BIM • Q2: Prefab • Q3: Smart and connected products • Q4: Media orientation	• Q1: Sustainability • Q2: Smart and connected products • Q3: Services in the installation market • Q4: Prefab	• Trend tracking • Brand funnels • Sustainability	• Q1: Orientation; sustainability • Q2: Purchase Channels; smart homes and products • Q3: Branding; private labels • Q4: DIY vs DIFM; plans for 2024	• Trends in material usage • Branding

Country coverage



Countries which we continuously research

Other countries which have been researched in past 2 years

A selection of USP Marketing Consultancy's clients

Construction			Installation			DIY			Living & Real Estate		
ASSA ABLOY	3M	FLEX Das Original	ABB	BOSCH	GIRA	adeo	OBI	Dulux	tiwos	bpd	Stadgenoot
DÖRKEN	VELUX	Tarkett	SFA	GRUNDFOS	hager	tesa	3 3	GROHE	AM	volkshuisvesting Arnhem	Gemeente Rotterdam
BMI	FESTOOL	fischer	sonepar	Schneider Electric	LG Life's Good	Villeroy & Boch	MTD	Bostik	Habion	syntrus achmea	3B Wonen
KNAUF	DAW	TRESPA	PipeLife	KALDEWEI	MITSUBISHI ELECTRIC	KÄRCHER	hansgrohe	UNILIN	CBRE	Staedion	van den Bruele vastgoed
Forbo	ROCKWOOL	DSM	Panasonic	TRILUX	uponor	WAGNER	KOHLER	Intergamma	Oosterpoort	AT OSBORNE	Wayland Real Estate
REYNAERS aluminium	WD-40	PPG	VIESSMANN	Vaillant	WOLF	maxeda DIY Group	ALLEGION	BRIGGS & STRATTON	Schiphol Real Estate	Haag Wonen	Gemeente Utrecht
Technische Unie	AkzoNobel	SIG	EMERSON	wavin	GEBERIT	cromology	Ideal Standard	ShurTech Brands	parteon	thuis	DEGOEDEWONING
Wienerberger	SAINT-GOBAIN	Sika	DAIKIN	signify	ROTHENBERGER	Yale	UHU	PPG	WOONVIZIER	Leystromen	zowonen

USP Marketing Consultancy