



European Mechanical Installation Monitor 2026:

Understanding how HVAC & plumbing installers adapt and shape your market

Europe's HVAC and plumbing market is changing — and installers are at the centre

Europe's HVAC and plumbing market is entering a new phase of structural change.

Manufacturers must navigate:

- Margin pressure reshaping brand choice
- Labour shortages are driving project selectivity
- Increasing digitalisation of installation workflows
- Growing influence of wholesalers and channels
- A fragmented installer media landscape

Market transformation is happening at the installer level



Installers are the main decision makers for products and brands

Specification does not guarantee installation.

Brand choice is increasingly made on-site, under pressure.

Installer behaviour is shifting — but how far?

- Switching brands based on price/availability?
- Prioritising “better jobs” over planned ones?
- Adapting to digital and AI-driven workflows?

Influence is shifting beyond direct brand control.

**The key question is no longer “what do installers think?”,
but “how do they actually decide TODAY?”**

European Mechanical Installation Monitor (EMIM)

Strategic insight into installer decision-making across Europe



SCOPE

- 6 European markets 
- 880 HVAC & plumbing installer interviews (CATI)
- One annual data collection wave
- Continuous trend tracking



TOPICS IN FOCUS

2026

- **General business development and trends**
- **Media orientation**
- **Adaptation to Emerging Trends** (digitalisation & AI, brand/price trade-offs, project selectivity, etc.)

2027 (pre-announcement)

- Business development & trends
- Purchase channels
- Services and training needs



DELIVERABLES

- Strategic report with executive summary & advisory notes (September)
- Internal presentation and discussion session
- Interactive dashboard (in development)



INVESTMENT (annual subscription) = **6.500 €**

EMIM 2026: More strategic, more actionable, more relevant

A refreshed monitor built around today's installer market realities



More STRATEGIC ADVISORY, not repetitive tracking



Topics aligned with the CHALLENGES SHAPING 2026–2028 decisions



CONTINUITY RETAINED — with sharper, more relevant insights



HIGHER RELEVANCE for commercial, channel and product teams



LOWER INVESTMENT, with stronger strategic value

NEW for 2027: EMIM Brand Scan (pre-announcement)

Who really wins in your category?

What you get:

- Brand funnel: awareness → usage → the most used brand
- Spontaneous brand associations: innovation | partnership | sustainability
- Insights at **product category level**

Why it matters:

- ✓ See where you **win (or lose) vs. competitors**
- ✓ Support **brand, product and channel decisions**

Will be available as an additional EMIM module in 2027, based on subscriber demand per category



Contact your EMIM team to **pre-register interest and prioritise categories**

Why manufacturers choose EMIM

Stronger installer insight for better commercial decisions

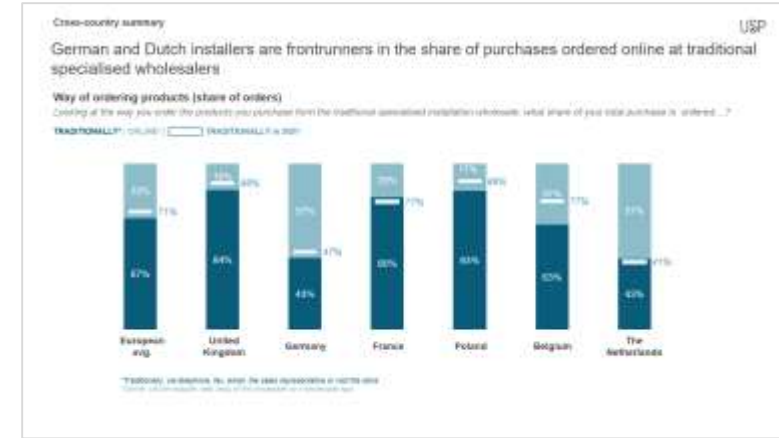
- ✓ Understand how **installers actually make decisions**
- ✓ Track **emerging trends** shaping your 2026–2028 strategy
- ✓ Anticipate **substitution risk and shifting brand dynamics**
- ✓ Strengthen **product, channel and communication decisions**
- ✓ Use **strategic reporting** that is easier to share internally

A sneak peek into previous EMIM reports....

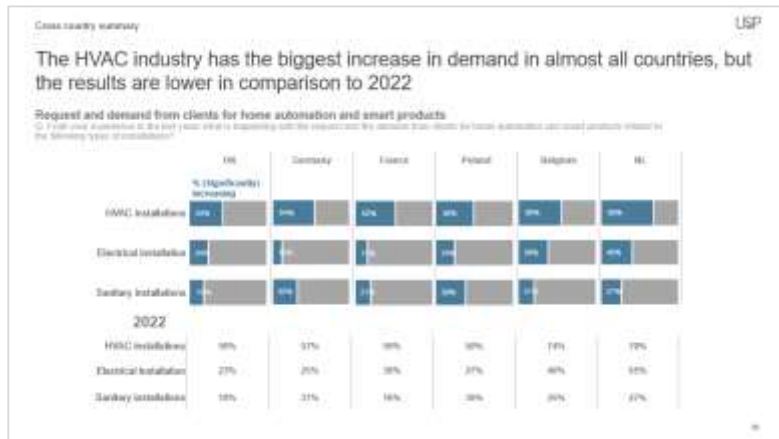
Sustainability:



Purchase channels:



Digitalisation:



Media orientation:



Your trusted EMIM contacts:

Let's explore how EMIM can support your business



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Connect the full construction decision chain

USP's European Construction Decision Intelligence Platform

ARCHITECTS

CONTRACTORS

INSTALLERS

WHOLESALEERS /
DEALERS

END-USERS

- **European Architectural Barometer**

- **Contractor Monitor**

- **Handymen Insight monitor**

- **Painter Insight monitor**

- **European Mechanical Installation Monitor**

- **European Electrical Installation Monitor**

<Channel dynamics captured through installer, contractor and homeowners' perspectives>

- **European Home Improvement Monitor**

Client Testimonials

What clients value in our market monitors

walraven

Johan Gijsman

Group Director Marketing, Walraven Holding

We have been using European Mechanical Installation Monitor issued by USP for many years for the planning of our strategic initiatives.

:hager

Céline Pineau

Consumer insight researcher at Hager

USP is professional, responsive, didactic, and voluntary. It was easy to exchange my thoughts with them.

Vaillant

Hardy Jaeschke

Senior Manager Market Research

The USP reports help us better understand different B2B target groups, better assess their business situations, and enrich our range of knowledge enormously.

ROTHENBERGER
planned infrastructure in reach

Dr. Christian Heine

CEO, Rothenberger AG

The European Mechanical Installation Monitor gives us great insights and these insights support our strategic decision.

■ GEBERIT

Renato Di Rubbo

Head of global Marketing Piping systems at Geberit

We value USP for the highly competent consulting, the pragmatic and uncomplicated process, and the high quality of its inputs.

Schneider
Electric

Miryam Salvador

Global Channel Director

Their specialized insights into construction and installation markets enable us to make informed go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.



Trusted by industry leaders

Supporting growth across construction, installation and home improvement

Construction

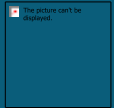


Installation & Home Improvement

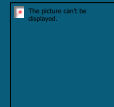


About USP Marketing Consultancy

Trusted insights for over 30 years



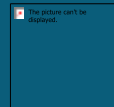
30+ years of international market research and consultancy experience



Specialised in construction, installation, DIY and real estate



Active in 40+ countries annually



Focused on trends, market developments and actionable insights



A strategic partner, not just a data provider

At USP, we deliver the insights you can truly build on.

Head office



The Netherlands – Rotterdam

Branche office



Croatia – Zagreb

Subsidiary



Germany – Düsseldorf



USP Marketing Consultancy

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