



ISORYX

Overview of application areas with global market potential

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1. ISORYX Inside Coating – Interior applications

"Specially developed for interior use – ensures a healthy indoor climate, reduces energy loss and provides a durable, mould-resistant surface."



Healthcare & hygiene areas

Application	Benefits
Hospitals	Antimicrobial protection, infection control (HAI prevention)
Clinics & doctors' surgeries	Mould resistance, healthy indoor climate
Operating theatres & intensive care units	Germ reduction on surfaces
Nursing homes & retirement homes	Odour neutralisation, fine dust/CO ₂ reduction
Rehabilitation centres	Certified for residential medicine (healthy indoor climate)
Laboratories & clean rooms	Hygienic, easy-to-clean surfaces
Dental practices	Antimicrobial, odour-neutralising
Veterinary practices & animal clinics	Hygiene, odour neutralisation



Education & public institutions

Application	Benefits
Schools & nurseries	Mould prevention, healthy indoor climate for children
Universities & lecture halls	Energy savings, CO ₂ reduction
Libraries & archives	Humidity control, mould protection
Sports halls & changing rooms	Antimicrobial, humidity control
Swimming pools (indoor)	Mould/algae resistance, vapour diffusion



Residential

Application	Benefits
Flats & houses	Energy savings, mould prevention
Basements	Moisture regulation, mould protection
Attics	Heat protection in summer (IR reflection)
Bathrooms & wet rooms	Hydrophobic, vapour-permeable, mould-resistant
Bedrooms	Certified for residential use, low VOC (Label A)
Children's rooms	Healthy indoor climate, low in pollutants
Renovation of old buildings	Thin layer (no loss of space), mould control
Listed buildings	Mineral, vapour-permeable, gentle on materials

Commercial & office

Application	Benefits
Office buildings	Energy savings, improved indoor climate
Hotels & Catering	Odour neutralisation, hygiene, energy costs
Restaurants & commercial kitchens	Antimicrobial, moisture resistant
Shopping centres	Large-scale energy savings
Server rooms	Temperature control



 Industry (indoor use)

Application	Benefits
Production halls	Energy savings, temperature control
Food processing	Hygiene, antimicrobial, easy to clean
Pharmaceutical	Clean room suitability, germ-reducing
Warehouses (temperature-controlled)	Energy saving, humidity control



Maritime applications – ship cabins & shipbuilding

Application	Benefits
Passenger cabins (cruise ships)	Healthy cabin climate, mould prevention in humid marine environments, odour neutralisation
Crew cabins	Antimicrobial protection, hygiene in confined spaces
Bridge & wheelhouse	IR reflection → less heating from solar radiation
Ship mess rooms & lounges	Healthy indoor climate, low VOC (important in closed systems)
Engine rooms (interior walls)	Temperature regulation, moisture protection
Naval vessels & submarines	Antimicrobial, mould prevention in closed ventilation systems
Yachts & sports boats	Premium interior climate, mould protection during winter storage
Ferries & river cruise ships	Energy-saving air conditioning, hygiene in passenger areas
Cargo ships (crew quarters)	Durable, low maintenance, mould resistant

Special advantage in the maritime sector:

- Extremely high humidity → ISORYX vapour-permeable & hydrophobic = **ideal combination against mould at sea**
- Closed ventilation systems → low VOC (Label A) = **no pollution of cabin air**
- Antimicrobial effect = **protection against infection in confined spaces** (norovirus problem on cruise ships)
- Thin layer thickness (0.40 mm) = **no loss of space** in cabins that are already cramped



Aviation – aircraft cabins & aviation

Application	Benefits
Passenger cabins (commercial aircraft)	IR reflection → reduced heating on the floor, energy savings for air conditioning
Cockpit	UV/IR reflection → heat protection from solar radiation
Cargo holds (temperature-controlled)	Temperature stabilisation for sensitive cargo
Business/first-class cabins	Premium indoor climate, antimicrobial, odour neutralising
Aircraft toilets & galleys	Antimicrobial, moisture-resistant, easy to clean
Private jets & VIP aircraft	Maximum comfort, healthy cabin climate
Helicopters (cabin)	Heat protection, compact application
Airport buildings (terminals)	Large-scale energy savings, hygiene

Special advantage in aviation:

- **Weight savings:** 0.40 mm layer thickness = **minimal additional weight** (critical in aviation: every gram counts)
- **Fire behaviour:** Tested according to EN 13823 (SBI) & EN ISO 11925-2 → **Aviation fire protection requirements can be addressed**
- **Low VOC (Label A):** Essential for closed pressurised cabins with recirculated air
- **Antimicrobial:** Infection protection on long-haul flights (aerosol transmission)

 **Note:** Additional certifications would be required for aviation approval (e.g. EASA/FAA approval, flame retardancy tests according to FAR 25.853). The existing fire tests (MA 39 Vienna) form a **solid basis** for the approval process.



2. ISORYX Outside Coating – Exterior applications

"The weatherproof exterior coating protects against heat, cold and moisture and ensures a sustainable, durable façade."

Facades & building envelopes

Application	Benefits
Residential building façades	UV/IR reflection, weather protection, energy savings
Multi-family homes	Large-scale energy savings, durability
Commercial and industrial façades	Weather protection, algae/mould resistance
Hospital façades	Energy savings + antimicrobial protection
Listed façades	Thin layer, mineral-based, gentle on materials
ETICS surfaces	Compatible, additional protection on existing insulation
Concrete surfaces	UV protection, carbonation protection
Plaster facades (mineral)	Optimal adhesion, vapour diffusion open

Industry & commerce (exterior)

Application	Benefits
Warehouses (outer shell)	Heat protection in summer, thermal insulation in winter
Production buildings	Energy savings, facade protection
Logistics centres	Large-scale application, cost-efficient
Petrol station roofs and walls	Weather protection, UV resistance



Special outdoor applications

Application	Benefits
Warehouses (outer shell)	Heat protection in summer, thermal insulation in winter
Production buildings	Energy savings, facade protection
Logistics centres	Large-scale application, cost-efficient
Petrol station roofs and walls	Weather protection, UV resistance



Containers & mobile buildings

Application	Benefits
Sea freight containers (exterior)	IR/UV reflection → drastic reduction in interior temperature (up to 30°C less in direct sunlight), corrosion protection
Sea freight containers (interior)	Moisture regulation → reduction of container rain (condensation), mould protection for cargo
Reefer containers	Energy savings for cooling unit, hygienic interior surfaces
Residential containers / modular buildings	Heat protection, mould prevention, healthy indoor climate
Office containers	Energy savings Air conditioning, improved comfort
Sanitary container	Antimicrobial, moisture-resistant, mould-resistant
Construction site containers	Robust protection, temperature regulation
Military containers	Heat protection in desert regions, cold protection in arctic areas
Refugee accommodation (containers)	Healthy indoor climate, mould prevention, energy savings
Mobile medical stations	Antimicrobial + temperature regulation in one
Offshore containers	Corrosion protection, moisture resistance, UV protection

Special advantage for containers:

- **Container rain problem solved:** Sea freight containers suffer from condensation (temperature changes between day and night, climate zones). ISORYX Inside regulates humidity and prevents condensation → protection of cargo
- **Extreme heating reduced:** Containers can reach internal temperatures of up to 70°C in the sun. IR reflection (>90%) can reduce this by 20–30°C
- **Thin layer:** 0.40 mm = no loss of load capacity (unlike conventional insulation)
- **Quick application:** airless sprayer → high throughput in container production



Pipelines & pipes

Application	Benefits
Oil & gas pipelines (above ground)	UV/IR reflection → temperature stabilisation of the medium, corrosion protection
Water pipes (above ground)	Frost protection in winter, overheating protection in summer
District heating pipes	Reduction of heat loss at the surface
Industrial pipelines	Temperature regulation, condensation prevention
Ventilation ducts & HVAC pipes	Antimicrobial (germ protection in ventilation systems), energy savings
Refrigerant pipes	Reduction of heat absorption, energy efficiency
Sewage pipes (above ground)	Corrosion protection, algae/mould resistance
Chemical pipelines	Chemical resistance (silicone resin-based), temperature regulation
Steam pipes	Reduction of heat loss, contact protection (surface temperature)
Pipelines in cold stores	Condensation prevention, antimicrobial
Sprinkler systems	Corrosion protection, durability

Special advantage for pipelines and pipes:

- **360° application:** seamless coating even on curves thanks to airless spraying process
- **Condensation prevention:** IR reflection + vapour diffusion = no condensation on cold pipes
- **Space-saving:** 0.40 mm instead of 20–50 mm conventional pipe insulation → no additional space required in narrow installation shafts
- **Retrofittable:** Easy application to existing pipes without dismantling
- **Durable:** 10-year warranty vs. conventional pipe insulation (often damaged/moist after 5–8 years)



Ship hulls & maritime exterior applications

Application	Benefits
Ship superstructures (deckhouse)	IR/UV reflection → reduction in air conditioning costs
Container storage areas on deck	Heat protection for deck containers
Offshore platforms	UV protection, weather resistance, corrosion protection
Port infrastructure	Warehouses, terminals – energy saving
Docks & shipyards (buildings)	Large-area facade coating

3. Dry Cool Coating – Cold stores & cooling applications

"Specially developed for cold stores. Enables hygienic and longer storage of food and other perishable goods."

Application	Benefits
Cold stores (food)	Hygienic storage, energy savings
Deep-freeze warehouses	Reduced energy consumption, antimicrobial
Supermarket cold rooms	Hygiene, mould prevention
Meat processing	Food hygiene, germ reduction
Dairies	Temperature stability, antimicrobial
Pharmaceutical cold storage	Hygiene, controlled environment
Flower/plant storage	Humidity control, mould protection
Wine storage & wine cellars	Temperature control, mould prevention
Refrigerated containers (reefers) – interior	Hygienic interior surfaces, energy savings
Ship cold rooms	Food storage at sea, antimicrobial

 Food has been proven to last two weeks longer in coated cold stores. In addition, significant energy savings are achieved. Water, ice and mould are 100% prevented.



4. Primario / Primario Plus – Primers

Product	Application	Benefits
Primario	Absorbent mineral substrates (interior & exterior)	Improved adhesion, optimal results
Primario Plus	Special/difficult substrates	Extended adhesion on problematic surfaces

Suitable substrates (including new areas of application)

- ✓ Mineral plasters (lime, cement, lime-cement)
- ✓ Plasterboard
- ✓ Concrete
- ✓ ETICS surfaces
- ✓ Old coatings (stable)
- ✓ Emulsion paints (old, stable)
- ✓ Silicate paints
- ✓ Silicone resin paints
- ✓ Metal substrates (containers, pipes, ship walls) – with Primario Plus
- ✓ GRP/composite materials (aircraft, yachts) – with Primario Plus



5. Extended application matrix

Industry / Area	Inside	Outside	Dry Cool	Primary	Market potential
 Hospitals	✓✓✓	✓✓	✗	✓	 Very high
 Schools/Education	✓✓✓	✓✓	✗	✓	 Very high
 Residential construction	✓✓✓	✓✓✓	✗	✓	 Very high
 Office/commercial	✓✓✓	✓✓	✗	✓	 High
 Hotels/restaurants	✓✓✓	✓✓	✓	✓	 High
 Industry	✓✓	✓✓✓	✓	✓	 High
 Cold storage	✗	✗	✓✓✓	✓	 High
 Food processing	✓✓	✓	✓✓✓	✓	 High
 Pharmaceutical industry	✓✓✓	✓	✓✓	✓	 High
 Listed building	✓✓✓	✓✓✓	✗	✓	 Medium
 Agriculture	✓	✓✓	✓✓	✓	 Medium
 Swimming pools	✓✓	✓✓	✗	✓	 Medium
 Ship cabins	✓✓✓	✓✓	✓	✓	  Very high
 Aircraft cabins	✓✓✓	✓	✗	✓	  Extremely high
 Container	✓✓✓	✓✓✓	✓✓✓	✓	  Extremely high
 Pipelines & pipes	✓✓	✓✓✓	✓	✓	  Very high
 Offshore/Oil & Gas	✓✓	✓✓✓	✗	✓	  Very high



6. 📊 Executive Summary: Global Market Potential

Sector	Global market volume	ISORYX addressable share	Priority
🏠 Residential	~€450 billion	€8–20 billion	🔥 🔥 🔥
🏥 Healthcare	~€65 billion	€5–12 billion	🔥 🔥 🔥
🎓 Education & public services	~€40 billion	€3–8 billion	🔥 🔥 🔥
🏢 Commercial & office	~€85 billion	€5–15 billion	🔥 🔥
🏭 Industry	~€55 billion	€4–10 billion	🔥 🔥
🏨 Hotels & catering	~€35 billion	€3–8 billion	🔥 🔥
❄️ Cold storage & refrigerated warehouses	~€12 billion	£1–3 billion	🔥 🔥
🍷 Food processing	~€18 billion	€2–5 billion	🔥 🔥
💊 Pharmaceutical industry	~€8 billion	€1–3 billion	🔥 🔥
🚢 Maritime / shipbuilding	~€22 billion	€2–6 billion	🔥 🔥 🔥
✈️ Aviation	~€4 billion	€0.5–2 billion	🔥 🔥
📦 Containers	~€6 billion	€1.5–4 billion	🔥 🔥 🔥
🔧 Pipelines & pipes	~€20 billion	€2–6 billion	🔥 🔥
🐄 Agriculture	~€5 billion	€0.5–1.5 billion	🔥
🏛️ Monument preservation	~€3 billion	€0.3–0.8 billion	🔥
🌊 Swimming pools & wellness	~€2 billion	€0.2–0.5 billion	🔥
TOTAL	~€830 billion	~€39–105 billion	



6.1 Healthcare & hygiene sectors

Applications

Application	Product	Benefits	Potential
Hospitals	Inside	Antimicrobial protection, HAI prevention	🔥 🔥 🔥
Clinics & doctors' surgeries	Inside	Mould resistance, indoor climate	🔥 🔥 🔥
Operating theatres & intensive care units	Inside	Germ reduction on surfaces	🔥 🔥 🔥
Nursing homes & retirement homes	Inside	Odour neutralisation, CO ₂ reduction	🔥 🔥 🔥
Rehabilitation centres	Inside	Certified for residential medicine	🔥 🔥
Laboratories & clean rooms	Inside	Hygienic surfaces	🔥 🔥
Dental practices	Inside	Antimicrobial, odour neutralising	🔥 🔥
Veterinary practices & animal clinics	Inside	Hygiene, odour neutralisation	🔥

Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Hospitals	~1,900	~15,000	~170,000
Medical practices/clinics	~100,000	~650,000	~3.5 million
Nursing homes	~15,500	~75,000	~350,000
Dental practices	~48,000	~340,000	~1.2 million
Average interior space/hospital	25,000 m	20,000 m ²	15,000 m ²
Renovation cycle	7–15 years	7–15 years	5–15 years
Costs of HAI (hospital-acquired infections)	~€2.5 billion/year	~€7 billion/year	~€35 billion/year
Antimicrobial coatings market	~€1.2 billion	~€4 billion	~€15 billion (2028)
CAGR antimicrobial coatings			12.5% p.a.



💰 ISORYX sales potential in healthcare

Region	Calculation	Potential/year
Germany	1,900 hospitals × 25,000 m ² × £11.67/m ² ÷ 10 years	~55 million €/year
EU	15,000 KH × 20,000 m ² × £11.67/m ² ÷ 10 years	~€350 million/year
Worldwide	170,000 KH × 15,000 m ² × £11.67/m ² ÷ 10 years	~3.0 billion per year
+ Medical practices (worldwide)	3.5 million × 200 m ² × £11.67/m ² ÷ 10 years	~817 million per year
+ Nursing homes (worldwide)	350,000 × 3,000 m ² × £11.67/m ² ÷ 10 years	~1.2 billion per year
 Total healthcare		~5.0 billion per year

💡 Hospital-acquired infections (HAIs) affect ~15 million patients/year worldwide and cause ~700,000 deaths/year in the EU alone. The WHO classifies HAIs as one of the greatest threats to global health. Antimicrobial coatings are a growing market with regulatory tailwinds.

6.2 Education & public institutions

Applications

Application	Product	Benefits	Potential
Schools & nurseries	Inside + Outside	Mould prevention, healthy indoor climate	🔥 🔥 🔥
Universities & lecture halls	Inside + Outside	Energy saving, CO ₂ reduction	🔥 🔥
Libraries & archives	Inside	Humidity control, mould protection	🔥
Sports halls & changing rooms	Inside	Antimicrobial, moisture regulation	🔥 🔥
Swimming pools (indoor)	Inside	Mould/algae resistance	🔥 🔥



Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Schools	~32,000	~250,000	~1.5 million
Kindergartens	~57,000	~350,000	~2 million
Universities	~400	~5,000	~30,000
Sports halls	~35,000	~200,000	~800,000
Average indoor area/school	5,000 m	4,000 m ²	3,000 m ²
Mould infestation in schools	~20–30	~15–25%	~20–40%
Renovation backlog (public buildings)	~150 billion	~500 billion	~€2,000 billion

ISORYX sales potential Education

Region	Calculation	Potential/year
Germany	$32,000 \times 5,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~187 million / year
EU	$250,000 \times 4,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~1.17 billion/year
Worldwide (schools)	$1.5 \text{ million} \times 3,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~5.25 billion/year
+ Kindergartens (worldwide)	$2 \text{ million} \times 500 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~1.17 billion per year
+ Universities (worldwide)	$30,000 \times 30,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~1.05 billion per year
 Total		~7.5 billion per year

 The global renovation backlog for public buildings is estimated at ~€2 trillion. Governments worldwide are investing heavily in the renovation of schools – especially after COVID-19, with a focus on healthy indoor air quality and infection control.



6.3 Residential construction

Applications

Application	Product	Benefits	Potential
Flats & houses (interior)	Inside	Energy savings, mould prevention	🔥 🔥 🔥
Apartments & houses (exterior)	Outside	UV/IR reflection, weather protection	🔥 🔥 🔥
Basements	Inside	Moisture regulation, mould protection	🔥 🔥 🔥
Attics	Inside	Heat protection in summer	🔥 🔥
Bathrooms & wet rooms	Inside	Hydrophobic, mould-resistant	🔥 🔥 🔥
Bedrooms & children's rooms	Inside	Healthy living, low VOC	🔥 🔥
Renovation of old buildings	Inside + outside	Thin layer, no loss of space	🔥 🔥 🔥
Listed building protection	Inside + Outside	Mineral-based, gentle on materials	🔥

Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Residential buildings	~19.4 million	~120 million	~500 million
Flats	~43 million	~220 million	~1.2 billion
Percentage with mould problems	~15%	~15–20%	~20–35%
Buildings in need of renovation (energy)	~75%	~75%	~70–85%
Interior paint market	~2.5 billion euro/year	~15 billion per year	~€85 billion/year
Facade paint market	~€1.8 billion/year	~12 billion per year	~€65 billion/year
Interior renovation cycle	5–10 years	5–10 years	5–15 years
EU Green Deal – Renovation Wave		~€275 billion/year until 2030	
Global building renovation investments			~€1,500 billion/year



ISORYX sales potential in residential construction

Region	Scenario	Potential/year
Germany (1% domestic market share)	$1\% \times \text{€}2.5 \text{ billion}$	~€25 million/year
EU (1% market share domestic + foreign)	$1\% \times \text{€}27 \text{ billion}$	~€270 million/year
Worldwide (1% market share)	$1\% \times \text{€}150 \text{ billion}$	~€1.5 billion/year
Worldwide (5% market share – ambitious)	$5\% \times \text{€}150 \text{ billion}$	~€7.5 billion/year
Mould remediation only (worldwide)	$175 \text{ million buildings} \times 100 \text{ m}^2 \times \text{€}11.67 \div 10 \text{ years}$	~€20.4 billion/year
 Realistic potential (3–5 years)		~€0.5–2.0 billion/year

 The global market for building paints and coatings is growing at a CAGR of ~5% and is estimated to exceed €200 billion by 2030. The EU Renovation Wave and national subsidy programmes (e.g. KfW in Germany, Superbonus in Italy) are driving massive demand for energy-saving coatings.



6.4 Commercial & office

Applications

Application	Product	Benefits	Potential
Office buildings	Inside + Outside	Energy savings, indoor climate	🔥 🔥
Shopping centres	Inside + Outside	Large-scale energy saving	🔥 🔥
Server rooms & data centres	Inside	Temperature control	🔥 🔥

Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Office buildings	~380,000	~2.5 million	~12 million
Shopping centres	~500	~7,000	~125,000
Data centres	~2,900	~10,000	~50,000
Average office space/building	2,500 m	2,000 m	1,500 m ²
Commercial building coatings market	~€4 billion/year	~€20 billion/year	~€85 billion/year

ISORYX sales potential Commercial

Region	Calculation	Potential/year
Worldwide (office buildings)	12 million × 1,500 m ² × £11.67/m ² ÷ 10 years	~21 billion/year
Realistic (1% market share)	1% × £85 billion	~850 million per year

💡 ESG requirements and sustainability certifications (LEED, BREEAM, DGNB) are driving demand for energy-saving and low-pollutant coatings in the commercial sector worldwide.



6.5 Hotels & catering

Applications

Application	Product	Benefits	Potential
Hotel room	Inside	Odour neutralisation, hygiene, energy costs	🔥 🔥 🔥
Hotel façades	Outside	Weather protection, energy savings	🔥 🔥
Restaurants & commercial kitchens	Inside	Antimicrobial, moisture resistant	🔥 🔥
Wellness areas & spas	Inside	Mould resistance, vapour diffusion	🔥 🔥

📊 Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Hotels	~34,000	~230,000	~700,000
Hotel rooms	~1 million	~6.5 million	~18 million
Restaurants	~73,000	~1.5 million	~15 million
Renovation cycle Hotels	5–8 years	5–8 years	3–8 years
Average area/hotel room (walls + ceiling)	~45 m ²	~40 m ²	~35 m ²

💰 ISORYX sales potential Hotels & catering

Region	Calculation	Potential/year
Worldwide (hotel rooms)	18 million × 35 m ² × £11.67/m ² ÷ 6 years	~1.23 billion/year
Worldwide (restaurants)	15 million × 150 m ² × £11.67/m ² ÷ 8 years	~3.28 billion per year
📊 Total hotels & restaurants		~4.5 billion per year

💡 The hotel industry is investing heavily in hygiene upgrades after COVID-19. Antimicrobial coatings are increasingly required as standard for premium hotels. Major chains such as Marriott, Hilton and Accor have launched hygiene programmes.



6.6 Industry

Applications

Application	Product	Benefits	Potential
Production halls (interior)	Inside	Energy savings, temperature regulation	🔥 🔥
Industrial façades	Outside	Weather protection, algae/mould resistance	🔥 🔥
Warehouses	Inside + outside	Energy saving, moisture regulation	🔥 🔥
Logistics centres	Inside + Outside	Large-scale, cost-efficient	🔥 🔥 🔥

📊 Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Industrial buildings	~250,000	~2 million	~12 million
Warehouses	~80,000	~500,000	~3.5 million
Logistics centres	~8,000	~50,000	~350,000
Average area of industrial buildings	5,000 m	4,000 m ²	3,000 m
Industrial coatings market	~3.5 billion euros/year	~15 billion euros/year	~€55 billion/year

💰 ISORYX sales potential Industry

Region	Calculation	Potential/year
Worldwide (1% market share)	1% × €55 billion	~€550 million/year
Worldwide (logistics centres)	350,000 × 10,000 m ² × €12/m ² ÷ 10 years	~€4.2 billion/year

💡 The global boom in e-commerce is driving massive construction of logistics centres. Amazon alone operates >1,500 fulfilment centres worldwide. Air conditioning these halls is an enormous cost factor – ISORYX can significantly reduce energy consumption here.



6.7. Cold stores & refrigerated warehouses

Applications

Application	Product	Benefits	Potential
Cold storage (food)	Dry Cool	Hygienic storage, energy savings	🔥 🔥 🔥
Deep-freeze warehouses	Dry Cool	Reduced energy consumption, antimicrobial	🔥 🔥 🔥
Supermarket cold rooms	Dry Cool	Hygiene, mould prevention	🔥 🔥
Meat processing	Dry Cool	Food hygiene, germ reduction	🔥 🔥 🔥
Dairies	Dry Cool	Temperature stability, antimicrobial	🔥 🔥
Pharmaceutical cold storage	Dry Cool	Hygiene, controlled environment	🔥 🔥 🔥
Wine storage & wine cellars	Dry Cool	Temperature control, mould prevention	🔥

Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Cold storage capacity	~25 million m ³	~120 million m ³	~616 million m ³
Cold stores (number)	~2,500	~15,000	~80,000
Supermarket cold rooms	~40,000	~300,000	~2.5 million
Pharmaceutical cold storage	~500	~3,000	~15,000
Cold storage construction market (global)			~€12 billion/year
Energy costs for cooling (global)			~€45 billion/year
CAGR cold storage market			~13% p.a.



💰 ISORYX sales potential cold storage

Region	Calculation	Potential/year
Worldwide (cold storage facilities)	$80,000 \times 5,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~467 million £/year
Worldwide (supermarket cold rooms)	$2.5 \text{ million} \times 50 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~182 million per year
Worldwide (pharmaceutical cold storage)	$15,000 \times 3,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~53 million per year
 Total cold storage facilities		~€700 million/year

💡 The global cold storage market is growing at ~13% CAGR – driven by e-commerce food delivery, vaccine cold chains (COVID-19 effect) and rising food safety standards. India and China are massively expanding their cold storage infrastructure. ISORYX Dry Cool Coating has a truly unique position here.

6.8 Food processing

Applications

Application	Product	Benefits	Potential
Slaughterhouses	Inside + Dry Cool	Antimicrobial, HACCP-compliant	🔥 🔥 🔥
Bakeries & Confectioners	Inside	Hygiene, mould prevention	🔥 🔥
Dairies	Inside + Dry Cool	Temperature stability, germ reduction	🔥 🔥 🔥
Beverage production	Inside	Moisture regulation, hygiene	🔥 🔥
Fish processing	Inside + Dry Cool	Odour neutralisation, antimicrobial	🔥 🔥 🔥



Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Food companies	~46,000	~290,000	~2.5 million
Slaughterhouses	~5,000	~25,000	~150,000
Dairies	~150	~12,000	~80,000
Food hygiene coatings market			~18 billion euro/year
HACCP compliance costs (global)			~€8 billion/year

ISORYX sales potential in food processing

Region	Calculation	Potential/year
Worldwide	$2.5 \text{ million} \times 2,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~7.3 billion/year
Realistic (1% market share)	$1\% \times \text{£}18 \text{ billion}$	~180 million per year

6.9 Pharmaceutical industry

Applications

Application	Product	Benefits	Potential
Clean rooms	Inside	Germ-reducing, low VOC	
Production facilities	Inside	Hygienic surfaces	
Pharmaceutical storage	Inside + Dry Cool	Temperature control, antimicrobial	
Research laboratories	Inside	Low pollutant, antimicrobial	



Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Pharmaceutical companies	~1,000	~5,000	~35,000
Pharmaceutical production facilities	~500	~3,000	~20,000
Pharmaceutical cleanroom coatings market			~€8 billion/year
CAGR			~8% p.a.

ISORYX sales potential in pharmaceuticals

Region	Calculation	Potential/year
Worldwide	$20,000 \times 10,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~233 million/year



6.10 Maritime applications – ship cabins & shipbuilding

Applications

Application	Product	Benefits	Potential
Passenger cabins (cruise ships)	Inside	Mould prevention, odour neutralisation	🔥 🔥 🔥
Crew cabins	Inside	Antimicrobial, hygiene in confined spaces	🔥 🔥 🔥
Bridge & wheelhouse	Inside	IR reflection, heat protection	🔥 🔥
Ship mess rooms & recreation rooms	Inside	Low VOC, healthy indoor climate	🔥 🔥
Engine rooms (interior walls)	Inside	Temperature regulation, moisture protection	🔥 🔥
Naval vessels & submarines	Inside	Antimicrobial, closed systems	🔥 🔥 🔥
Yachts & sports boats	Inside + outside	Premium indoor climate, mould protection	🔥 🔥
Ferries & river cruises	Inside	Energy saving, hygiene	🔥 🔥
Ship superstructures (outside)	Outside	IR/UV reflection, corrosion protection	🔥 🔥
Offshore platforms	Inside + outside	UV protection, weather resistance	🔥 🔥 🔥



Global market potential

Key figure	Value
Merchant ships worldwide	~105,000
Cruise ships worldwide	~340 (+ ~50 under construction/on order)
Cabins per cruise ship (average)	~2,000–3,000
Total cruise cabins worldwide	~800,000
Ferries worldwide	~15,000
Yachts (>24 m) worldwide	~35,000
Naval vessels worldwide	~13,000
Offshore platforms worldwide	~12,000
Average cabin area (walls + ceiling)	~40 m ²
Marine coatings market (global)	~€22 billion/year
CAGR marine coatings	~6% p.a.
Cruise passengers/year	~32 million (2024)
Norovirus outbreaks on ships/year	~200+ (CDC data)



ISORYX sales potential Maritime

segment	Calculation	Potential/year
Cruise cabins (inside)	$800,000 \times 40 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~47 million per year
Cruise ship (common areas)	$340 \times 10,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~5 million per year
Merchant ships (crew quarters)	$105,000 \times 500 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~61 million per year
Ferries	$15,000 \times 2,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~35 million per year
Naval vessels	$13,000 \times 3,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~€46 million/year
Yachts	$35,000 \times 200 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~€10 million/year
Offshore platforms	$12,000 \times 5,000 \text{ m}^2 \times \text{£}12/\text{m}^2 \div 10 \text{ years}$	~72 million per year
External coating (superstructures)	$105,000 \times 1,000 \text{ m}^2 \times \text{£}10.07/\text{m}^2 \div 10 \text{ years}$	~127 million per year
 Total maritime		~€403 million/year

 The cruise industry is growing at **~8% CAGR**. Norovirus outbreaks cost the industry **hundreds of millions of euros** annually in compensation and reputational damage. Antimicrobial cabin coatings are increasingly becoming standard. The IMO (International Maritime Organisation) is also tightening environmental regulations – low-VOC coatings are gaining in importance.



6.11 Aviation – Aircraft Cabins & Aviation

Applications

Application	Product	Benefits	Potential
Passenger cabins (commercial aircraft)	Inside	IR reflection, energy saving Air conditioning	🔥 🔥 🔥
Cockpit	Inside	UV/IR reflection, heat protection	🔥 🔥
Cargo holds (temperature-controlled)	Inside	Temperature stabilisation	🔥 🔥
Business/first-class cabins	Inside	Premium cabin climate, antimicrobial	🔥 🔥 🔥
Aircraft toilets & galleys	Inside	Antimicrobial, easy to clean	🔥 🔥 🔥
Private jets & VIP aircraft	Inside	Maximum comfort, healthy cabin climate	🔥 🔥
Helicopters	Inside	Heat protection, compact application	🔥
Airport buildings (terminals)	Inside + outside	Large-scale energy savings	🔥 🔥 🔥



Global market potential

Key figure	Value
Commercial aircraft worldwide (active)	~28,000
New aircraft ordered (backlog)	~16,000 (Airbus + Boeing)
Private jets worldwide	~23,000
Helicopters (civil) worldwide	~40,000
Airports worldwide	~17,000 (of which ~4,000 have terminals)
Passengers/year (global)	~4.7 billion (2024)
Average cabin space (walls + ceiling) per aircraft	~200–400 m ²
Aerospace coatings market (global)	~€4 billion/year
CAGR aerospace coatings	~7% p.a.
Cabin renovation cycle	Every 6–8 years
Cost of cabin refurbishment/aircraft	~€2–15 million

ISORYX sales potential in aviation

Segment	Calculation	Potential/year
Commercial aircraft (cabin)	$28,000 \times 300 \text{ m}^2 \times \text{€}11.67/\text{m}^2 \div 7 \text{ years}$	~14 million €/year
New aircraft (backlog)	$2,300/\text{year} \times 300 \text{ m}^2 \times \text{€}11.67$	~€8 million/year
Private jets	$23,000 \times 80 \text{ m}^2 \times \text{€}11.67/\text{m}^2 \div 6 \text{ years}$	~€3.6 million/year
Airport terminals	$4,000 \times 50,000 \text{ m}^2 \times \text{€}11.67/\text{m}^2 \div 10 \text{ years}$	~€233 million/year
 Total aviation		~€259 million/year

 **Important note:** Additional certifications are required for aircraft cabin approval (EASA/FAA, FAR 25.853 flame retardancy). The existing fire tests (MA 39 Vienna) form a **solid starting point**. The **airport terminal segment**, on the other hand, can **be addressed immediately** without additional approvals.



💡 The aviation industry is investing heavily in cabin health after COVID-19. Airlines such as Delta, Lufthansa and Emirates have launched hygiene programmes. Weight reduction is extremely valuable in aviation: **1 kg less weight saves ~£100/year in fuel per aircraft**. ISORYX, with a layer thickness of 0.40 mm, has a unique advantage here.

6.12 Containers & mobile buildings

Applications

Application	Product	Benefits	Potential
Sea freight containers (outside)	Outside	IR reflection, temperature reduction 20–30°C	🔥 🔥 🔥
Sea freight container (inside)	Inside	Container rain solution, mould protection	🔥 🔥 🔥
Reefer container	Dry Cool	Energy saving cooling unit	🔥 🔥 🔥
Residential containers / modular buildings	Inside + outside	Heat protection, mould prevention	🔥 🔥 🔥
Office containers	Inside + Outside	Energy saving Air conditioning	🔥 🔥
Sanitary container	Inside	Antimicrobial, mould-resistant	🔥 🔥
Construction site containers	Inside + outside	Robust protection, temperature control	🔥 🔥
Military containers	Inside + Outside	Heat protection in the desert, cold protection in the Arctic	🔥 🔥 🔥
Refugee accommodation	Inside + Outside	Healthy indoor climate, energy savings	🔥 🔥 🔥
Mobile medical stations	Inside	Antimicrobial + temperature regulation	🔥 🔥 🔥
Offshore containers	Inside + outside	Corrosion protection, UV protection	🔥 🔥



Global market potential

Key figure	Value
Sea freight containers worldwide (inventory)	~50 million (TEU equivalent)
New container production/year	~5–6 million
Refrigerated containers (reefers) worldwide	~4 million
Residential/office containers worldwide	~3 million
Military containers worldwide	~500,000
Average interior space of a 20-foot container	~28 m ²
Ø External area of a 20-foot container	~35 m ²
Container coatings market (global)	~€6 billion/year
CAGR container market	~5% p.a.
Container rain damage/year (global)	~€2–5 billion (cargo damage)
Modular construction market (global)	~€130 billion (2028)
CAGR modular construction	~7% p.a.

ISORYX sales potential for containers

Segment	Calculation	Potential/year
New containers (interior + exterior)	5 million × (28+35) m ² × £12/m ²	~3.78 billion/year
Existing containers (retrofitting 5%)	2.5 million × 63 m ² × £63/m ²	~1.89 billion per year
Refrigerated containers (dry cool)	4 million × 28 m ² × £11.67/m ² ÷ 8 years	~163 million per year
Residential/office containers	3 million × 28 m ² × £11.67/m ² ÷ 8 years	~123 million per year
 Total containers		~€5.96 billion/year
Realistic (1% market penetration)		~60 million per year



 The container market is one of the most attractive sectors for ISORYX:

- Container rain causes billions of euros in cargo damage every year – ISORYX solves this problem
 - Overheating in containers destroys temperature-sensitive goods (pharmaceuticals, electronics, food)
 - Container production is highly concentrated (>95% in China) – a single large order can generate enormous volume
 - Modular construction is growing at a CAGR of 7% – every residential container needs an interior coating
-



6.13 Pipelines & Piping

Applications

Application	Product	Benefits	Potential
Oil and gas pipelines (above ground)	Outside	Temperature stabilisation, corrosion protection	🔥 🔥 🔥
Water pipes (above ground)	Outside	Frost protection, overheating protection	🔥 🔥
District heating pipes	Outside	Reduction of heat loss	🔥 🔥 🔥
Industrial pipelines	Outside	Temperature regulation, condensation prevention	🔥 🔥
Ventilation ducts & HVAC pipes	Inside	Antimicrobial, energy saving	🔥 🔥 🔥
Refrigerant pipes	Outside	Reduction of heat absorption	🔥 🔥
Steam pipes	Outside	Heat loss reduction, contact protection	🔥 🔥
Pipes in cold stores	Inside/dry cool	Condensation prevention, antimicrobial	🔥 🔥
Sprinkler systems	Outside	Corrosion protection, durability	🔥
Chemical pipelines	Outside	Chemical resistance, temperature regulation	🔥 🔥



Global market potential

Key figure	Value
Oil and gas pipelines worldwide	~2.2 million km
Water pipes worldwide	~5 million km
District heating pipes (EU)	~250,000 km
HVAC market (global)	~€290 billion/year
Ventilation ducts (estimated global area)	~5 billion m ²
Pipeline coatings market (global)	~€20 billion/year
CAGR pipeline coatings	~5.5% p.a.
Pipe insulation market (global)	~€12 billion/year
Energy losses due to poorly insulated pipes	~15–30% of transport energy
New pipeline construction/year (global)	~30,000 km

ISORYX sales potential Pipelines & pipes

Segment	Calculation	Potential/year
Oil/gas pipelines (above ground, ~30%)	$660,000 \text{ km} \times 3 \text{ m}^2 \text{ (circumference)} \times \text{£}12.07/\text{m}^2 \div 15 \text{ years}$	~159 million €/year
New pipeline construction	$30,000 \text{ km} \times 3 \text{ m}^2 \times \text{£}12.07$	~1.09 billion/year
District heating pipes (EU)	$250,000 \text{ km} \times 2 \text{ m}^2 \times \text{£}12.07/\text{m}^2 \div 15 \text{ years}$	~40 million per year
HVAC/ventilation ducts (1% global)	$1\% \times 5 \text{ billion m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~584 million/year
Industrial piping	estimated	~200 million per year
 Total pipelines & pipes		~€2.07 billion/year



💡 *The pipeline sector offers enormous potential, in particular:*

- *HVAC ventilation ducts: Antimicrobial coating in ventilation systems is a post-COVID megatrend (legionella, mould spores in air conditioning systems)*
- *District heating: EU investing heavily in district heating networks as part of the energy transition*
- *New pipeline construction: Despite the energy transition, 30,000 km of new pipelines are being built worldwide every year (hydrogen, CO₂ transport, water)*
- *Space advantage: 0.40 mm vs. 20–50 mm conventional insulation = game changer in narrow installation shafts*

6.14 Agriculture

Applications

Application	Product	Benefits	Potential
Stables (indoor)	Inside	Antimicrobial, odour neutralisation	🔥 🔥
Barns & warehouses	Inside + outside	Moisture regulation, mould protection	🔥 🔥
Greenhouses	Outside	IR reflection, temperature regulation	🔥 🔥
Grain silos	Inside	Mould prevention, hygiene	🔥 🔥
Milk chambers	Inside + Dry Cool	Hygiene, temperature control	🔥 🔥 🔥

📊 Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Agricultural businesses	~260,000	~10 million	~570 million
Farms with indoor housing	~170,000	~5 million	~200 million
Greenhouses (area)	~1,200 ha	~175,000 ha	~500,000 ha
Agricultural coatings market			~5 billion euro/year



ISORYX sales potential in agriculture

Region	Calculation	Potential/year
Worldwide (1% of farms with indoor housing)	$2 \text{ million} \times 1,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 10 \text{ years}$	~€2.33 billion/year
Realistic (0.1% market penetration)		~€233 million/year

6.15 Monument protection

Applications

Application	Product	Benefits	Potential
Historic façades	Outside	Mineral-based, gentle on materials, thin layer	 
Historic interiors	Inside	Vapour-permeable, mould-resistant	 
Churches & sacred buildings	Inside + Outside	Moisture regulation, mould protection	 
Museums & galleries	Inside	Low VOC, climate control for exhibits	 

Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Listed buildings	~1 million	~5 million	~15 million
UNESCO World Heritage Sites	52	~450	1,199
Museums	~6,800	~55,000	~95,000
Churches/sacred buildings	~45,000	~500,000	~4 million
Market for monument renovation	~€3 billion/year	~15 billion per year	~40 billion per year



💰 ISORYX sales potential for monument preservation

Region	Calculation	Potential/year
Worldwide (0.5% of buildings/year)	$75,000 \times 2,000 \text{ m}^2 \times \text{£}12/\text{m}^2$	~1.8 billion/year
Realistic		~100–300 million £/year

6.16 Swimming pools & wellness

Applications

Treatment	Product	Benefits	Potential
Indoor swimming pools	Inside	Mould/algae resistance, vapour diffusion	🔥 🔥
Saunas & steam baths	Inside	Moisture resistant, antimicrobial	🔥 🔥
Spa & wellness areas	Inside	Hygiene, healthy indoor climate	🔥 🔥
Outdoor pools (buildings)	Inside + outside	Weather protection, mould prevention	🔥

📊 Global market potential

Key figure	Germany	Europe (EU)	Worldwide
Swimming pools (public)	~6,000	~65,000	~300,000
Private pools (indoor)	~50,000	~500,000	~5 million
Spa/wellness facilities	~7,000	~50,000	~250,000



 ISORYX sales potential Swimming pools & wellness

Region	Calculation	Potential/year
Worldwide (public swimming pools)	$300,000 \times 3,000 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~1.31 billion/year
Worldwide (wellness)	$250,000 \times 500 \text{ m}^2 \times \text{£}11.67/\text{m}^2 \div 8 \text{ years}$	~182 million per year
 Total		~1.5 billion per year

6.17 Overview: ISORYX Global market potential by sector

#	Sector	Theoretical potential/year	Realistic (1–3 years)	Realistic (5–10 years)
1	 Healthcare	€5.0 billion	€50–150 million	€500 million – €1.5 billion
2	 Education & public services	€7.5 billion	€30–100 million	€400 million – €1.2 billion
3	 Housing	€20.4 billion	€25–150 million	€500 million – €2.0 billion
4	 Commercial & office	€21.0 billion	€20–80 million	€300 million – €1.0 billion
5	 Hotels & Catering	€4.5 billion	€15–60 million	€200 million – €800 million
6	 Industry	€4.2 billion	€20–80 million	€250 million – €900 million
7	 Cold stores & refrigerated warehouses	€700 million	€10–40 million	€100 million – €350 million
8	 Food processing	€7.3 billion	€15–50 million	€200 million – €700 million
9	 Pharmaceutical industry	€233 million	€5–20 million	€50 million – €150 million
10	 Maritime / shipbuilding	€403 million	€10–40 million	€80 million – €250 million
11	 Aviation	€259 million	€5–30 million	€50 million – €200 million
12	 Containers	€5.96 billion	€10–60 million	€300 million – €1.5 billion
13	 Pipelines & pipes	€2.07 billion	€10–50 million	€150 million – €600 million
14	 Agriculture	€2.33 billion	€5–20 million	€80 million – €300 million
15	 Monument protection	€1.8 billion	€5–15 million	€50 million – €200 million
16	 Swimming pools & wellness	€1.5 billion	€3–10 million	€40 million – €150 million
	 TOTAL	~€85.4 billion/year	~€238 million – €955 million/year	~€3.25 billion – €11.8 billion/year

6.18 Visualisation: Top 10 sectors by potential

Rank	Sector	Potential/year	Share of total market
	 Residential construction	€20.4 billion	23.9
	 Commercial & office	€21.0 billion	24.6
	 Education & public sector	€7.5 billion	8.8
4	 Food processing	€7.3 billion	8.5
5	 Containers	€5.96 billion	7.0
6	 Healthcare	€5.0 billion	5.9
7	 Hotels & catering	€4.5 billion	5.3
8	 Industry	€4.2 billion	4.9
9	 Agriculture	€2.33 billion	2.7
10	 Pipelines & pipes	€2.07 billion	2.4
	<i>Other 6 sectors</i>	€5.89 billion	6.9
	TOTAL	€85.4 billion	100

6.19 Prioritisation matrix: Market potential × Market access

Sector	Potential	Market access*	Competition**	Priority
Healthcare	★★★★★	★★★★★	★★★★★ (low)	🔥🔥🔥 TOP
Housing	★★★★★	★★★★★	★★ (high)	🔥🔥🔥 TOP 2
Container	★★★★★	★★★★	★★★★★ (low)	🔥🔥🔥 TOP 3
Education & Public	★★★★	★★★★	★★★★ (medium)	🔥🔥🔥 TOP 4
Cold storage	★★★	★★★★★	★★★★★ (very low)	🔥🔥🔥 TOP 5
Hotels & Restaurants	★★★★	★★★★★	★★★★ (average)	🔥🔥 High
Food processing	★★★★	★★★★	★★★★ (medium)	🔥🔥 High
Industry	★★★★	★★★★	★★ (high)	🔥🔥 High
Pipelines & pipes	★★★★	★★	★★★★ (medium)	🔥🔥 High
Maritime / Shipbuilding	★★★	★★	★★★★ (medium)	🔥🔥 High
Pharmaceutical industry	★★★	★★	★★★★ (medium)	🔥 Medium
Commercial & office	★★★★★	★★★★	★★ (high)	🔥🔥 High
Aviation	★★★	★ (Approved!)	★★★★★ (low)	🔥 Medium (long term)
Agriculture	★★★	★★★★	★★★★★ (low)	🔥 Medium
Listed building	★★	★★	★★★★ (medium)	🔥 Niche
Swimming pools & wellness	★★	★★★★	★★★★ (medium)	🔥 Niche

* Market access = How easy is it to access the sector (sales channels, decision-makers, tenders)? ** Competition = How many comparable products already exist? (more stars = less competition = better for ISORYX)

6.20 Regional market distribution (estimated)

Region	Share of global potential	Key sectors	Market entry complexity
EU Europe	~25% (~€21 billion)	Housing, health, education, heritage	★ ★ (domestic market)
US North America	~22% (~€19 billion)	Commercial, healthcare, containers, industry	★ ★ ★
CN China	~18% (~€15 billion)	Containers (!), industry, residential construction	★ ★ ★ ★
IN India	~8% (~€7 billion)	Residential construction, cold storage, healthcare	★ ★ ★
SA Middle East	~7% (~€6 billion)	Commercial, hotels, containers, pipelines	★ ★ ★
JP Asia-Pacific (rest)	~10% (~€9 billion)	Maritime, containers, industry	★ ★ ★
 Africa	~5% (~€4 billion)	Residential construction, healthcare, containers	★ ★ ★ ★
BR Latin America	~5% (~€4 billion)	Residential construction, food, industry	★ ★ ★



6.21 Strategic conclusion

ISORYX addresses a theoretical total market of ~€85.4 billion/year worldwide.

Time horizon	Realistic sales potential	Prerequisite
Short term (1–3 years)	€238 million – €955 million/year	EU focus, sales development, reference projects
Medium term (5–10 years)	€3.25–11.8 billion/year	Global expansion, strategic partnerships
Long term (10+ years)	€10–25 billion/year	Technology platform, licensing model, industry standard

The 5 strategic priority markets:

Priority	Sector	Why?
	Healthcare	Highest demand, least competitive environment, regulatory tailwind (HAI prevention), premium prices enforceable
	Residential	Largest volume, EU Renovation Wave, mould problem as a mass market driver
	Containers	Global scaling possible, concentrated production (China), unique selling point (container rain), enormous volume
4	Education & public	Political tailwind (renovation backlog), public tenders = predictable revenues
5	Cold storage	Truly unique (Dry Cool), rapidly growing market (13% CAGR), no comparable competitive product

ISORYX has the potential to evolve from a European niche product into a global technology platform for functional coatings – with an addressable market that far exceeds that of most coating manufacturers.