



Competitive Overview:

**Unitized vs Pre-Engineered vs NxtWall**

## AESTHETIC CONSIDERATIONS (Subjectivity?)



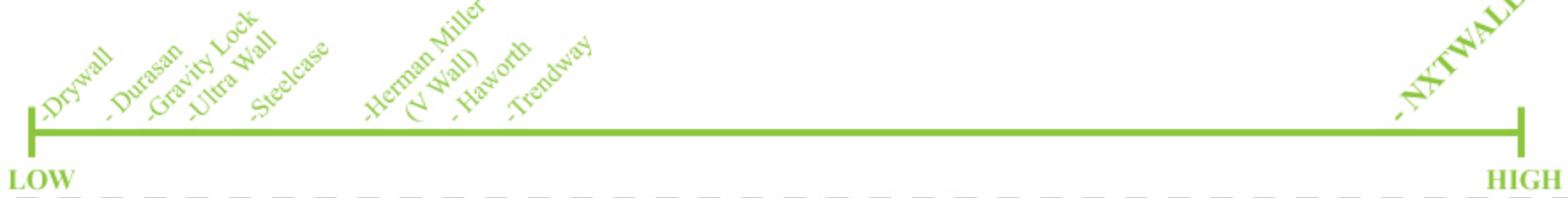
## PRICE CONSIDERATIONS



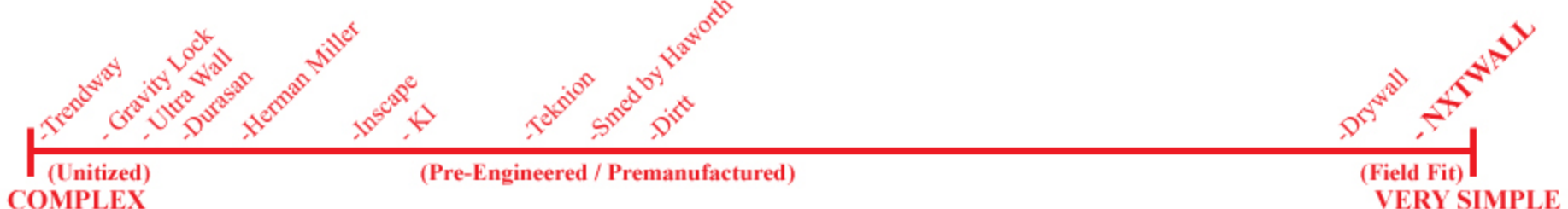
## FLEXIBILITY CONSIDERATIONS



## SUSTAINABILITY CONSIDERATIONS



## SIMPLICITY SCALE

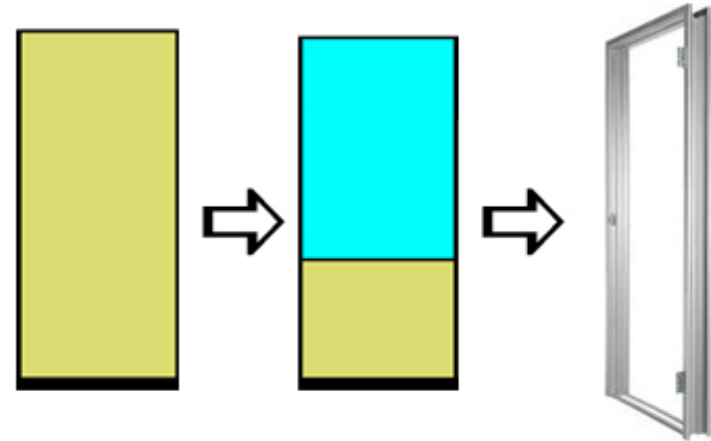


# Purpose of Presentation

This session will review significant difference between the various approaches to walls such as the “***unitized***” and ***demountable pre-engineered*** approaches.

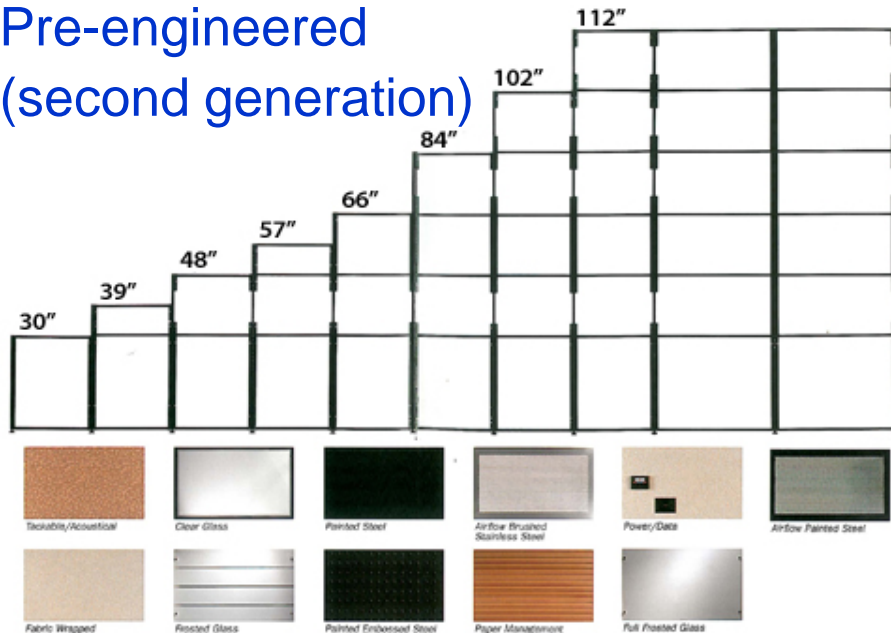
It will compare and contrast competitors with **NxtWall’s** unique “***field fit***” approach.

# Various Approaches to Interior Wall Construction



Unitized (first generation)

Pre-engineered  
(second generation)



Truly Demountable  
"Field Fit"

*(product fits to building conditions)*

# Conventional Construction

This approach is not simply a gypsum wall, but includes the “stick built” glass fronts available in the industry.

Why they build them.....

- Lowest Cost
- Allows end user to build whatever they would like to build
- Perception of movement not required
- Aesthetically they appear to be fixed or have a sense of permanence
- Widespread use in any environment
- Can be constructed to deliver any STC or sound control level
- “You can repair a hole in the wall without having to order a new panel with an extended lead time”

# Conventional Construction

What they dislike about them.....

- They are permanent
- Require too much time to complete
- No depreciation or tax benefit
- Constructed wall will increase real property tax burden (depends on state tax codes)
- Require multiple trades to complete its construction
- Significant dirt and debris not ideal for construction in an occupied area
- Change requires tear down, disposal and rebuild
- Non environmentally friendly waste goes in landfill
- When built to deck they require more cost with ceiling and flooring cut ins. More cost....more waste

# “Unitized” vs Pre-Engineered/Pre-Manufactured vs NxtWall

## *Who are they?*

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Trendway</li><li>• SMED</li><li>• Transwall</li><li>• Inscape</li><li>• KI Genius Wall</li><li>• Infinium</li><li>• Steelcase Privacy Wall</li><li>• Others</li></ul>	<ul style="list-style-type: none"><li>• DIRT</li><li>• Teknion Altos</li><li>• Enclose</li><li>• Many of the Italian or European designed products</li><li>• Others</li></ul>	<ul style="list-style-type: none"><li>• NxtWall<ul style="list-style-type: none"><li>- Flex Series</li><li>- Genesis Series</li><li>- View Series</li></ul></li></ul>

# Product Design and Construction

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Welded or assembled frame delivered as a completed and closed core panel</li><li>• Most widely used and widely accepted. First generation approach</li><li>• May have handed doors</li><li>• Walls designed to go over carpet to ceiling grid</li></ul>	<ul style="list-style-type: none"><li>• Kit of parts consisting of vertical uprights, horizontal cross-members, various trim pieces, screws, panel and or panel inserts, glazing, etc. All parts are built to and for a specific requirement</li><li>• Adapted from systems furniture approach</li><li>• May have handed doors</li><li>• Walls designed to go over carpet to ceiling grid</li></ul>	<ul style="list-style-type: none"><li>• A minimal kit of parts consisting of a universal vertical and horizontal stud, single top and bottom track, joint cover strip, wall material, insulation, and a few miscellaneous parts</li><li>• Current generation with adaptability for changing applications or building conditions</li><li>• Universal and non-handed doors</li><li>• Walls capable of going floor to ceiling or deck to deck</li></ul>



# Financial Consideration

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Qualifies for accelerated depreciation schedule of IRS Tax code</li><li>• Dealer sell typically \$225.00 - \$400.00</li><li>• Product reuse during changes provide a greater ROI</li></ul>	<ul style="list-style-type: none"><li>• Qualifies for accelerated depreciation schedule of IRS Tax code</li><li>• Dealer sell Typically \$300.00 - \$600.00</li><li>• Product reuse during changes provide a greater ROI</li></ul>	<ul style="list-style-type: none"><li>• Qualifies for accelerated depreciation schedule of IRS Tax code</li><li>• Dealer Sell Typically \$125.00 - \$325.00</li><li>• Product reuse during changes provide a greater ROI (Higher product reuse?)</li></ul>

# Aesthetic Considerations

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Use of woods, laminates, fabrics, glass, decorative resin or polycarbonate inserts, etc...</li><li>• No seamless glass fronts</li><li>• Single or Double Pane Glass Fronts - Very Few?</li><li>• Center Paned Glass</li><li>• Recessed reveal for panel to panel connection</li><li>• Recessed floor or ceiling reveal</li><li>• Horizontal reveals available</li><li>• Standard panel widths based on 6" or 12" increments</li></ul>	<ul style="list-style-type: none"><li>• Use of woods, laminates, fabrics, glass, decorative resin or polycarbonate inserts, etc...</li><li>• Seamless glass fronts</li><li>• Single or Double Pane Glass Fronts - Very Few?</li><li>• Center Paned Glass</li><li>• Recessed reveal for panel to panel connection</li><li>• Recessed floor or ceiling reveal</li><li>• Horizontal reveals available</li><li>• Standard panel widths based on 6" or 12" increments</li></ul>	<ul style="list-style-type: none"><li>• Use of woods, laminates, fabrics, glass, decorative resin or polycarbonate inserts, etc...</li><li>• Seamless Glass Fronts</li><li>• Single or Double Pane Glass Fronts</li><li>• View Series Provides Center Pane Glass</li><li>• Flex Series has no recessed reveal - Joint cover strip has a functional purpose for "field fit".</li><li>• Flex Series has no recessed ceiling and floor reveal.</li><li>• Horizontal reveal available</li><li>• Panel widths available for any increment</li></ul>

# Acoustic Consideration

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Capable of 30 to low 40 STC rating. Typically consistent FSTC performance</li><li>• Single pane glass with reduced STC performance</li><li>• Designed to attach to ceiling grid</li></ul>	<ul style="list-style-type: none"><li>• Capable of 30 to low 40 STC rating. Typically inconsistent FSTC performance</li><li>• Some with option for double pane glass(seals???)</li><li>• Designed to attach to ceiling grid</li></ul>	<ul style="list-style-type: none"><li>• Capable of Low 40 to above 50 STC rating. Typically consistent FSTC performance</li><li>• Single or double pane glass. View series can use 1/2" glass with stronger STC</li><li>• Designed to attach to ceiling grid and or to deck</li><li>• Ability to Integrate drop seals on doors</li></ul>

# Flexibility Considerations

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Panels are welded or fixed and built to the specification ordered or desired for each specific installation</li><li>• Height adjustment with glides only</li><li>• Widths are not changed in field</li><li>• Difficult to cut around window sills, bulkheads, columns, etc...</li></ul>	<ul style="list-style-type: none"><li>• Panels are pre-engineered/pre-manufactured and built to the specification ordered or desired for each specific installation</li><li>• Height adjustment with glides only or in some cases an add on frame and tile</li><li>• Widths are not changed in field unless order for new horizontal cross-member and tile</li><li>• Not designed to be cut around window sills, bulkheads, columns, etc...</li></ul>	<ul style="list-style-type: none"><li>• Product can be easily altered, cut, etc.- in the field to adapt to a change requirement</li><li>• Height is easily changed in the field, up or down</li><li>• Panel widths are easily changed in the field</li><li>• Easily cut around window sills, bulkheads, special columns, etc...</li><li>• Glass Panels converted to solid and solid back to glass</li></ul>

# Product Reuse Considerations

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Finish of wall material cannot be changed</li><li>• Wall height cannot be increased or decreased</li><li>• Panel configuration (<i>i.e. half glass/half solid etc.</i>) cannot be altered</li></ul>	<ul style="list-style-type: none"><li>• Finish of wall material can be changed with some limitations</li><li>• Wall height can be increased with a special pre-engineered and pre-manufactured add on</li><li>• Panel configuration can be altered. In some cases it requires the correct parts, horizontal cross members, etc</li></ul>	<ul style="list-style-type: none"><li>• Wall finish (glass or solid) is easily changed from install to install</li><li>• Wall height can be easily changed up or down</li><li>• Panel is easily altered in the field prior to or during installation</li><li>• Horizontal Studs can function as verticals and reverse</li></ul>

# Ordering Logistics and Installation

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Panels are ordered to the specific install, one panel is typically one part (exception for base and trim)</li><li>• Panels are shipped fully assemble to be stud in to place</li><li>• Glass is shipped typically already assembled in panel</li><li>• Material cannot be ordered until ceilings, floors, internal walls are completed to confirm measurement</li><li>• Significant packaging material</li></ul>	<ul style="list-style-type: none"><li>• Many parts and pieces required to complete panel</li><li>• Panels are shipped KD "Knocked Down"</li><li>• Glass is shipped with all material for installation</li><li>• Material cannot be ordered until ceilings, floors, internal walls are completed to confirm measurement</li><li>• Significant packaging material</li></ul>	<ul style="list-style-type: none"><li>• Panel consists of universal studs and tracks and wall board</li><li>• Panels are shipped KD "Knocked Down"</li><li>• Glass is typically measured in the field. Pre-order requires use of View series or careful measurements</li><li>• Materials can be ordered larger to support an <b><u>accelerated</u></b> construction schedule</li><li>• Minimal packaging material</li></ul>

# Sustainability Considerations

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Supports use of glass or light emitting materials to allow natural light to flow through space</li><li>• Regional material usage to be determined based on end user proximity to production facility</li><li>• Product includes recyclable and recycled content</li><li>• Product requires <b>significant</b> labor and processing to return product back to raw material for recycling</li></ul>	<ul style="list-style-type: none"><li>• Supports use of glass or light emitting materials to allow natural light to flow through space</li><li>• Regional material usage to be determined based on end user proximity to production facility</li><li>• Product includes recyclable and recycled content</li><li>• Product requires labor and processing to return product back to raw material for recycling</li></ul>	<ul style="list-style-type: none"><li>• Supports use of glass or light emitting materials to allow natural light to flow through space</li><li>• Easily supports use of regional material usage</li><li>• Product includes recyclable and recycled content</li><li>• Product recycles easily with no additional cost</li><li>• Supports use of Low VOC Material</li></ul>

# Electrical and Data

The "Unitized" Demountable Wall	Pre-Engineered/Pre-Manufactured Demountable Wall	NxtWall's "Field Fit" Capability
<ul style="list-style-type: none"><li>• Utilize standard wiring system, hard wire compatible typically at base, no ability to route wiring through panels due to closed core</li><li>• Data cables run through base or panel to panel pilaster</li><li>• Most prefer base infeed</li></ul>	<ul style="list-style-type: none"><li>• Utilize standard wiring system, typically NOT hard wire compatible, ability to route wiring through panels due to open core</li><li>• Data cables run through open core of panels and base</li><li>• Infeed at base or ceiling</li></ul>	<ul style="list-style-type: none"><li>• Utilize standard wiring system, hardwiring, or other modular quick connect systems. Wiring and data easily accessed through internal cavity of panel</li><li>• Data cables run through or to any place on the panel</li><li>• Infeed at base or ceiling</li></ul>



Thank you!

