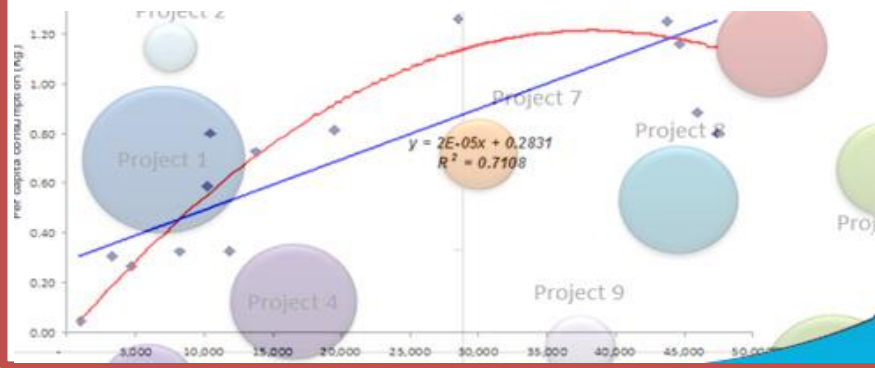


# Select case studies of research carried out by MCG

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*Management Consultancy  
Market Research & Analysis  
Global Consulting Skills*

# Aluminium downstream products manufacturing in GCC – Market analysis in MENA region & Europe, technical and financial feasibility -

## Client / Industry Brief

- The client is one of the world's largest extrusion company
- The client was interested to know the market for aluminium downstream products in the MENA region and the financial feasibility of setting up manufacturing facilities for aluminium downstream products in UAE

## Project Objectives

### Market Research & Analysis

- Market analysis included both primary and secondary / internet research; primary research covered the key end user sectors, producers and major distributors in the region; personal (face-to-face) discussions was conducted in ten countries
- Market analysis was guided by experts with long experience in the aluminium downstream sectors
- The technical and financial feasibility was conducted by MCG's team in India with support from technical specialists

### Financial Feasibility

- To estimate project cost and funding
- To estimate operating costs
- To prepare financial projections and analysis

## Project Methodology

- Market analysis included both primary and secondary / internet research
- Primary research covered the key end user sectors as well as major distributors in the region
- Personal (face-to-face) discussions was conducted in seven countries; Telephonic discussions were conducted in three countries
- The Market analysis was guided by experts with long experience in the aluminium downstream sectors in India and other regions
- The financial feasibility was conducted by MCG's team in India with support from technical specialists
- Discussions were held with the client's Sales and Marketing team with extensive experience in marketing aluminium extrusions in the region

## Project Benefits

- Based on the results of the market study, MCG arrived at a suitable product-mix for the Flat Rolled Products complex
- Based on the financial feasibility reports, MCG provided advise on the viability of setting up manufacturing facilities for aluminium downstream products in UAE
- A long term strategic plan was drawn up for the extrusion business to increase the global footprint of the client

# Market Entry Strategy

## - Elevators & Escalators in Middle East -

### Client / Industry Brief

- A global leader in Elevators & Escalators based in Europe has been one of MCG 's premier clients, for whom MCG has carried out a series of market research studies to analyse the Indian Elevator & Escalator markets on qualitative, quantitative and competitive dimensions.

### Project Objectives

- Estimate the current market in Middle East for elevators and escalators (volume) and forecast the demand for next 5 years
- Competition analysis and profile of key players including product range, and major markets addressed
- Assess the purchase pattern in terms of brand name, models, price point, and quality of after sales service
- Collect details on commercial practices such as credit period and margins
- Discuss government regulations

### Project Methodology

- The assignment was handled through a mix of primary and secondary research
- Primary research including face-to-face was undertaken in select countries in Middle East
- The stakeholders met included suppliers (incl. importers) and end users
- Secondary research included detailed internet research and detailed analysis of published documents

### Project Benefits

- The assignment helped the client strategize market penetration strategy
- The market potential assisted in planning production capacity based on market projections

# Market analysis in the Middle East & India

## - Aluminium Extrusion for the Building & Construction sector -

### Client / Industry Brief

- The client is a large aluminium extrusion manufacturer in GCC and was interested in getting a detailed study on the Aluminium Extrusion market (with focus on building & construction sector) in the Middle East and India

### Project Objectives

- Market and consumption analysis of aluminium extrusion in select countries in the Middle East and India
- Profiling of major aluminium extrusion mills in the Middle East and India
- Develop a strategic road map

### Project Methodology

- Market analysis included both primary and secondary / internet research. Primary research (face-to-face discussions) covered the key end users - manufacturers of doors & windows, unitised systems – glass in combination of aluminium used in the building & construction sector, scaffolding, etc., intermediate fabricators and large building and construction companies as well as extrusion manufacturers
- Market analysis was guided by experts with long experience in the aluminium extrusions

### Project Benefits

- Assisted the client to get a good understanding of these markets and enabled them formulate their long term strategic marketing plan

## - Assessment of the availability of aluminium scrap in GCC -

### Client / Industry Brief

- The client, one of the leading producers of primary aluminium in the world, is interested in assessing the availability of aluminium scrap in GCC

### Project Methodology

- The research methodology comprised extensive primary and secondary research
- Primary research included personal (face-to-face) interviews with about 45 stakeholders
- In-depth secondary research included library sources as well as internet research.

### Project Objectives

- An overview of the aluminium scrap value chain in the region with focus on:
  - Understanding the role played by the stakeholders
  - Identifying the companies operating in the value chain
  - Identifying key traders/ exporters of aluminium scrap in the countries of focus in GCC
  - Identifying the new players in scrap collection / disposal
- Scrap generation, in volume terms, was collected by type, by alloy in each GCC country with a split up between clean and post-consumer scrap
- Type and volume of aluminium scrap exported was also undertaken as part of the study
- A likely scenario for aluminium scrap generation, usage and export in the GCC region, in 2022 was carried out

### Project Benefits

- The study finding assisted the client in assessing the feasibility of setting up a recycling aluminium facility

# Market research and analysis

## - Assessment of market potential for water purifier units in select states -

### Client / Industry Brief

- Bosch Limited, Bangalore commissioned Madras Consultancy Group, Chennai, in October 2016, to undertake detailed assessment of the market potential for water purification systems in select states across India

### Project Objectives

- Water Purification Systems division of Bosch Ltd had designed a water purifier systems with a combination of ultrafiltration and reverse osmosis technologies
- Main objective is to understand whether this type of product has good potential in the targeted market so that the division can make a decision to go ahead with this product or not

### Project Methodology

- Market analysis included both primary and secondary research
- The research covered 133 interviews among bulk water purifier users- Developers & builders, architects & consultants, academic Institutions, commercial buildings, hospitals, hotels & resorts, potable water bottling plants, Water purifier manufacturers / distributors
- The research to be conducted in Andhra Pradesh / Telangana, Karnataka, Kerala, Tamil Nadu and Maharashtra

### Project Benefits

- Mapping of the water purifier market covering existing installations of water purifiers, including manufacturer, capacity, technology, price and performance
- Assessment of the customer's needs / key criteria for the purchase decision
- Estimate the market potential for water purifiers with break up by capacity and end use segment
- Identify key competitors- manufacturers/ suppliers of water purifiers and profile them

# Deep Dive study

## - Air conditioning market in India -

### Client / Industry Brief

- US based multinational major in the HVAC industry commissioned UK based leading industry research and consultancy organisation on a South East Asia Deep Dive study on the air conditioning market
- As a part of the assignment, MCG undertook detailed assessment of the air conditioning market in India

### Project Objectives

- Understand the main variables of the local markets : products, regulation, applications, channels, profitability...
- Market forecasts and identification of main trends
- Understand market segments
  - Channel member / client type
  - End User
  - Product
- Analyse demand and purchase drivers
- Identify key success factors to successfully compete in this market
- Identify commoditised factors and differentiating
- Benchmarking with market leader in each product group
- Product and support services offered

### Project Methodology

- Around 130 face-to-face interviews were held amongst,
  - Project Type Dealers (PTD)
  - M&E Contractors
  - Consultant/ Architects
  - End users

### Project Benefits

- For each product segment, the following results were achieved:
- Market segmentation: by region, by application and by channel
- Identify the product and channel trends.

# Market research and analysis in Turkey

## - Assessing the market potential for Electric Overhead Travelling (EOT) cranes -

### Client / Industry Brief

- The client is a global leader in lifting businesses and offers a complete range of advanced lifting solutions to many different industries worldwide
- The client was interested in a detailed assessment of the market for EOT Cranes in Turkey

### Project Objectives

- Estimate the market size for EOT cranes in Turkey, in value and volume terms
- Identify and provide a break-up of key end user segments for EOT cranes in Turkey
- Gather data on import / export of EOT cranes in Turkey
- Identify the top 20 manufacturers of EOT cranes in Turkey and gather details of their production of EOT cranes, product portfolio, segments of focus and capacity / product expansion plans
- Obtain an indication of the refurbishment market for EOT cranes in Turkey

### Project Methodology

- The methodology for this study comprised primary research, supported by in-depth secondary desk research
- Primary research involved personal (face-to-face) interviews covering manufacturers of EOT cranes in Turkey
- A local market research agency was engaged to conduct field research; MCG's senior consultant travelled to Istanbul to undertake preliminary meeting briefing the local market research agency in Turkey
- Survey analysis, secondary research and report were completed in India
- The field research was undertaken in 5 cities in Turkey- Istanbul, Ankara, Izmir, Kocaeli & Konya

### Project Benefits

- Based on the results of the market study, MCG arrived at a suitable product-mix for industrial cranes market in Turkey
- A strategic marketing plan was drawn up for the industrial crane business in Turkey



# Management consultancy assignment in India & Bangladesh

## - Steam Turbine Gensets -

### Client / Industry Brief

- The client is a well-known manufacturer of steam turbines and pumps in Japan
- The client was interested in understanding the market for industrial steam turbine gensets (energy systems) in India and Bangladesh

### Project Objectives

- Installed base of steam turbine gensets across user segments and identify types and outputs of existing steam turbines
- Collate data on capacities, temperatures, and fuels of the existing boilers in operation at customers' plants
- Identify parameters that influence buying decision
- Assess the current level of satisfaction among users
- Gather details on maintenance intervals for steam turbines and about the service provider
- Gather details on customers' investment plans in plant and equipment (new project, expansion project, augmentation project)

### Project Methodology

- The research methodology comprised extensive primary and secondary research.
- Primary research included personal (face-to-face) interviews with various user segments of steam turbines, manufacturers, service providers, and Government departments.
- In all around 80 face-to-face interviews were conducted in 12 major cities of India and 20 interviews in Bangladesh.

### Project Benefits

- The study indicated the significant demand for steam turbines and helped the client in entering the Indian market

# Assessment of market for plastic caps for leading firm based in GCC

## Client / Industry Brief

- The client, a joint venture established with foreign collaboration offers complete closure systems and caters to leading soft drinks manufacturers in the Middle East and Indian sub continent beverage markets

## Project Objectives

- Market dimension
  - To assess the demand –supply scenario
  - Current market size with break up by end user segment
  - Future market potential (3-5 year period)
- Supply dimension
  - Collate details on local manufacturers and study capabilities
  - Gather details relating to imports including sources of supply

## Project Methodology

- The assignment was handled through a mix of primary and secondary research
- Primary research including face-to-face was undertaken in select countries in the GCC region
- The stakeholders met included suppliers (incl. importers) and end users
- Secondary research included detailed internet research and detailed analysis of published documents

## Project Benefits

- The assignment helped the client strategize market penetration strategy
- The market potential assisted in planning production capacity based on market projections

# Market analysis in India

## - Plastic (PET) bottles -

### Client / Industry Brief

- The client, is a leading integrated conglomerate in the petrochemical industry in India with complete backward integration and forward linkages. The company is a leading supplier of raw materials for PET bottles world wide.

### Project Objectives

- Market size sub-segment wise , Market geography wise
- Major Customer listing sub-segment wise with their consumption pattern
- Competitors and their share in each sub-segment, Channel (Direct/Indirect), Customer- wise
- Value proposition in each sub-segment, Customer wise
- Market trend over the next five years, correlated to sub-segment growth
- Competitors SWOT and Opportunities & Threats
- Major competitors' key strengths and their dominant market presence

### Project Methodology

- The pan –India assignment entailed a sample size of 150 respondents
- Primary research was held amongst raw material suppliers (incl. importers), PET preform manufacturers, Injection moulding/ blow moulding companies and select end users across bottled water, soft drinks and other beverage categories
- Secondary research included detailed internet research and detailed analysis of published documents

### Project Benefits

- The assignment helped the client understand the potential for PET bottles in India across various user segments
- The market analysis assisted in planning production capacity based on market projections

# Study on PP/ HDPE woven sacks packaging used in cement industry in India

## Client / Industry Brief

- The client, is an Austria based multinational company packaging major
- The client is interested to understand the packaging dynamics in the cement industry in India

## Project Objectives

- Detailed description of the packaging medium used across the cement product segments including :
  - Packaging medium vis-à-vis product segment
  - Pack size across standard and premium products
  - An estimate of the volume of packaging medium consumed by the industry per annum
  - Key sources of packaging medium
  - Recycling aspects of both media – current practices and perceptions
- An analysis of the marketing levers influencing the usage of respective packaging media at present, and the potential levers for transition from plastic to paper
- Estimation of Total Cost of Ownership (TCO) and comparative economics of PP / HDPE woven sacks

## Project Methodology

- The research methodology comprised primary research supported by secondary research.
- Around 50 personal interviews (face-to-face discussions) were conducted amongst leading cement manufacturers, Paper sack & plastic woven sack manufacturers, Large distributors / retailers, associations & Industry experts including technical consultants

## Project Benefits

The assignment assisted the client to understand-

- The high end segments in the Cement industry in India
- The major players who would need to be influenced to penetrate this market segment
- The marketing levers that could drive the transition
- Cultural issues that could impact the transition
- The actual total cost of ownership of plastics vs. paper in India

# Market research & location evaluation in India

## - Gearboxes used in wind turbine and industrial applications -

### Client / Industry Brief

- The client, based in Finland, is a leading global manufacturer of gearboxes (energy transmission system).
- In view of entering the Indian market, the client wanted to assess the market potential for gearboxes used in the wind turbine and industrial applications.

### Project Objectives

- Gather data/information from OEMs (machinery manufacturers) in terms of specifications of the gearboxes used, no. of gearboxes used, procurement prices, sources of supply and future plans
- Estimate the current market for gearbox in India and assess the market potential and forecast the demand for gearbox in India for the next 3-5 years with break up by major user industries
- Analysis of supply dimension of gearbox including domestic production and import
- Collate data from end users in terms of gearboxes installed, key specifications, details of service provider
- Study the role played by the Consultant in setting gearbox specifications for machinery / equipment

### Project Methodology

- The research methodology comprised primary research supported by secondary research.
- Around 80-90 personal interviews (face-to-face discussions) were conducted amongst end user segments, dealers, distributors, importers, manufacturers
- Secondary research included detailed internet research and detailed analysis of published documents
- The study included location evaluation for setting up workshops / service centres

### Project Benefits

- The study provided a clear understanding of the gearbox market in India in terms of market potential, competition and future demand.
- Around 5 to 6 cities were evaluated across various parameters and suggested the most suitable location to the client for setting up their workshop / service centres
- The study results helped the client to strategise their entry into the Indian market

# Building a Focussed Strategy for Growth

## - Aluminium extrusions business in India -

### Client / Industry Brief

- The client, headquartered in Sweden, is a leading global manufacturer of extruded aluminium sections.
- The group's wholly owned subsidiary in India was interested in getting an understanding of the Indian market for aluminium extrusions and precision machined aluminium extruded sections (up to 500 mm length), which are widely used in the building and construction sector.

### Project Objectives

- Estimate the aluminium extrusion market across major end user segments across select applications and forecast the demand for next 5 years
- Market break-down by end use segments and region
- Identify major alloys used across key applications and price points
- Major manufacturers of aluminium extrusion and market share; profile manufacturers including production capacity, product portfolio, end use segments of focus and future expansion plans
- Development of segmental strategy with focus on geography, business volume across end user segments

### Project Methodology

- Research methodology included intensive primary research and secondary research.
- Around 180 face-to-face interviews were conducted in 14 cities in India.
- During the study a large number of builders, developers and contractors were interviewed

### Project Benefits

The study helped the client in :

- Assessing the market potential for aluminium extrusion across key end user segments
- Identifying opportunities for their product offerings that can replace imported products
- Identifying customer groups in large public sectors such as railways and State Transport Corporations
- Strategizing their marketing & promotional activities

# Market Research & Analysis

## - Construction chemicals market in India -

### Client / Industry Brief

- The Client is a Joint Venture between a domestic group and a Germany based leading manufacturer of construction chemicals
- As a part of their expansion programme and further investments, the client were interested in assessing the market demand for a wide range of construction chemicals market with special focus on Water Proofing, Repair & Flooring products.

### Project Objectives

- Analysis of the building & construction industry in India, in terms of market size, growth trends, awareness about construction chemicals & its usage pattern
- Profile the industry structure of the construction chemicals markets in India
- Estimate the current market size and expected growth and demand forecasts for the next 5 years with break-up by select product groups, end user segments and region
- Purchase process followed by users and analysis of problems and issues
- Competition analysis – major players, product portfolio, market share and future expansion plans
- Analysis of distribution structure and commercial practices followed by the industry
- Government rules and regulations

### Project Methodology

- The study included extensive primary research supported by intensive secondary research.
- Around 225 face-to-face interviews were conducted across 30 cities in India.
- During the study a large number of builders, developers and contractors were interviewed across major cities of India.

### Project Benefits

- Provided a detailed mapping of construction chemicals used across building & construction segment
- The study helped the client in positioning their brand suitably in the highly competitive construction chemical market
- Strategise their further investment plans for expanding their offerings that can replace imported products

# Market Research & Analysis

## - Portable Gensets Market in India -

### Client / Industry Brief

- The client, headquartered in South Korea, was interested in getting an all India market research study conducted on portable power generating sets (energy equipment) used in the building & construction sector

### Project Objectives

- Estimate the current market in India for portable gensets (volume) in the building & construction sector and forecast the demand for next 5 years
- Competition analysis and profile of key players including product range, and major markets addressed
- Assess the purchase pattern in terms of brand name, models, price point, and quality of after sales service
- Collect details on commercial practices such as credit period and margins from dealers / distributors
- Gather data on pricing (to the extent feasible) and rental details for gensets
- Discuss government regulations - Pollution Control Board, Regional Transport Authority

### Project Methodology

- The research methodology comprised of intensive primary research with around 170 face-to-face interviews amongst building & construction companies, genset manufacturers and genset assemblers
- Around 8 major cities in India were visited during the study. Methodology also included exhaustive secondary research
- During the study a large number of builders, developers and contractors were interviewed

### Project Benefits

- Based on the study results, MCG recommended the client a strategic direction to enter the Indian portable genset market in the building and construction sector



# Market Research Study in India

## - Protective Coatings -

### Client / Industry Brief

- The client wanted an assessment of the market potential for protective coatings / paints being used in Steel Structures in select segments, viz., high rise commercial buildings, stadiums and steel bridges.

### Project Objectives

- Estimation of the of high performance protective coatings and Epoxy Intumescent type (fire proofing) coatings being used for steel structures in high rise building (commercial malls & complexes, multiplexes, technology parks, theme parks, airports etc.)
- Listing of major users of protective coatings and provide details on purchase parameters and purchase process
- Existing source of supply and price parameters

### Project Methodology

- The research methodology comprised of intensive field research, i.e. personal (face-to-face) interviews with private and Government departments, architects, structural engineers, builders and industry experts, and supported by in-depth secondary research
- Around 90 face-to-face interviews were conducted in 8 major cities of India.

### Project Benefits

- Market estimation of protective coatings, by product/application
- Prepared value proposition for each target segment
- Provided strategic direction for the client to enter these markets

# Market research & analysis in India

## - Excavator and wheel loader markets -

### Client / Industry Brief

- The client is a leading Indian joint venture company which planned to manufacture / market excavators and wheel loaders in India
- The client was interested to understand the market potential for excavators and wheel loaders in India

### Project Objectives

- Overview of the earth moving and material handling equipment sector in India
- Estimate market size for excavators and wheel loaders, in value and volume terms
- Provide market break up by product segments, customer segments and region wise split
- Gather details on the refurbishment market for excavators and wheel loaders and assess customer preference as well as share of refurbishment market
- Identify the key end user segments and gather details on usage pattern, product specifications
- Study the ownership pattern across customer segments and understand the role played by the stake holders
- Gather details regarding product performance and maintenance and many more aspects

### Project Methodology

- The methodology for this study comprised extensive primary research, supported by in-depth secondary desk research
- Primary field research comprised personal (face-to-face) interviews with various user segments of excavators, contractors, hirers, manufacturers, dealers, and others such as Government departments, infrastructure funding agencies
- Secondary research included MCG's library sources as well as internet research
- List of respondents was generated from MCG's library and database and through other external sources
- A total of 122 interviews were conducted in around 28 cities across 10 states in India
- Mines & quarries were visited at : Andhi, Barbil, Bellary, Hospet, Kadapa, Salem, Dhanbad, Asansol and Chennai

### Project Benefits

- The study provided a detailed understanding of the excavator and wheel loader markets in India
- The study findings were used as a basis to develop a market entry strategy

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