



**International
Market
Strategy**



**International strategic market research and
consultancy on building product and related markets**

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**PROPOSAL FOR A SYNDICATED RESEARCH
PROGRAMME ON CENTRAL, AIR AND
WATER HEATING MARKETS
IN NORTH AMERICA**



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1. INTRODUCTION

BRG CONSULT has established itself as the leading provider of international industrial market research on heating products within the global framework. Its annual coverage of 30 countries in Europe has become a standard source of market intelligence within the European heating products industry and its gradual expansion to markets further afield has been continuous.

Since its integration into the BRG Group, BRG CONSULT has enjoyed the benefits of being part of a dynamic and growth driven organisation. One such benefit has been the establishment of a 30 employee office in New Jersey through which BRG CONSULT will operate its North American Building Products division with a view to providing a similar service across the pond to its current offering in Europe.

One of the first phases of this development is to re-launch the North American heating products update (USA and Canada) in 2006.

Therefore, BRG CONSULT is pleased to present this proposal for a multi-client programme covering the two North American markets. The proposal which follows sets out the scope of such a study, the content and reporting formats, how BRG CONSULT would conduct it, and the timing and costs which would be involved.

2. SCOPE

2.1 PRODUCT SCOPE

The product scope for this proposed survey would be based on BRG CONSULT's current European coverage in addition to North American specific product families. This would therefore consist of:

- boilers
 - wall hung gas boilers
 - floor standing gas boilers
 - jet burner boilers
 - solid fuel/steam
- burners
 - solo/replacement
 - fitted to new units
- wet system radiators
 - steel panel radiators
 - towel warmers
 - steel element radiators
 - aluminium radiators
 - cast iron radiators
- water heating
 - linked water heating
 - combi boilers
 - indirect cylinders
 - dedicated water heating
 - electric storage water heaters
 - electric instantaneous water heaters
 - gas storage water heaters
 - gas instantaneous water heaters

- air conditioners
 - room air conditioners
 - split air conditioners
 - other light-commercial air conditioners (direct expansion).
- furnaces
- heat pumps.

2.2 GEOGRAPHICAL SCOPE

The study would cover the whole of the USA and Canada.

2.3 TIMESCALE

The base year for the study would be 2005 with forecasts to 2010. Historical trends would start at 1995.

3. CONTENT AND FORMAT

3.1 CONTENT

The overall content of each country report will follow much the same lines as BRG CONSULT's European heating reports as they will be generated by the now well known FILEMAKER global heating products database. The reports will contain all the quantitative and qualitative data relevant to a comprehensive market study. The layout and content is therefore proposed as follows:

- **Product/Market Summaries and Forecasts (“Yellow Pages”)** for each product family:
 - comments on recent market trends and developments
 - volume sales trends 1994-2005 and forecasts 2006-2010
 - market values and average prices
 - technical segmentations
 - end use breakdown
 - volume sales and market shares of the main competitors (by holding and subsidiary).

These detailed but condensed summaries in graphic format represent a well known and much appreciated feature of BRG CONSULT's reports. They also form the heart of the FILEMAKER database as they are generated by it

- **Introduction and Glossary**
- **Section 1: Background**
 - Geography and Administration
 - Population and Demographic Trends
 - Households and Housing Stock
 - Macro-Economic Trends and Employment Patterns
 - Construction
 - Legislation, Regulations Controls and Incentives
 - Structure of Demand
 - Energy
 - Heating Park

- **Section 2: Heating Products Market – Overview**
 - Total Heating Products Market
 - Overall Structure of Supply
- **Section 3: Boilers and Burners**
 - Market Size, Trends and Characteristics
 - Historical Development and 2005 Market
 - Forecasts to 2010
 - Boilers: Market Analysis by Type of Boiler
 - Wall hung Gas Boilers
 - Floor Standing Atmospheric Gas Boilers
 - Jet Burner Boilers
 - Solid Fuel and Other Boilers
 - Focus on Collective and Commercial Boilers
 - Boilers: Prices and Market Values
 - Price Structures
 - List Prices
 - Market Value Estimates
 - Boilers: Supply
 - Wall hung Gas Boilers
 - Floor Standing Atmospheric Gas Boilers
 - Jet Burner Boilers
 - Solid Fuel and Other Boilers
 - Focus on Collective and Commercial Boilers
 - Burners
 - Market Size, Trends and Characteristics
 - Technical Segmentation
 - Prices and Market Values
 - Supply
- **Section 4: Radiators**
 - Radiators: Overall Market Size, Trends and Characteristics

- Historical Development and 2005 Market
- Forecasts to 2010
- Radiators: Market Analysis by Type of Radiator
 - Steel Panel Radiators
 - Towel Warmers
 - Steel Element Radiators
 - Aluminium Radiators
 - Cast Iron Radiators
- Radiators: Prices and Market Values
- Radiators: Supply
 - Steel Panel Radiators
 - Towel Warmers
 - Steel Element Radiators
 - Aluminium Radiators
 - Cast Iron Radiators

– **Section 5: Water Heaters**

- Water Heaters: Overall Market Size, Trends and Characteristics
 - Historical Development and 2005 Market
 - Forecasts to 2010
- Water Heaters: Market Analysis by Type of Water Heater
 - District Heating
 - Combi Boilers
 - Indirectly Heated Hot Water Cylinders
 - Electric Water Heaters
 - Instantaneous Electric Water Heaters
 - Electric Storage water Heaters
 - Gas Water Heaters
 - Instantaneous Gas Water Heaters
 - Gas Storage Water Heaters
- Water Heaters: Prices and Market Values
- Water Heaters: Supply

- Combi Boilers
- Indirectly Heated Hot Water Cylinders
- Electric Water Heaters
 - Instantaneous Electric Water Heaters
 - Electric Storage water Heaters
- Gas Water Heaters
 - Instantaneous Gas Water Heaters
 - Gas Storage Water Heaters.

– **Section 6: Air Conditioners**

- Air conditioners: Overall Market Size, Trends and Characteristics
 - Historical Development and 2005 Market
 - Forecasts to 2010
- Air conditioners: Market Analysis by Type of Air Conditioner
 - Room Air Conditioners
 - Window Room Air Conditioners
 - Portable/Mobile Air Conditioners
 - Split Air Conditioners
 - Mono-Split Air Conditioners
 - Multi-Split Air Conditioners
 - Variable Refrigerant Flow Air Conditioners
 - Ducted vs. Duct-Free
 - Other Light-Commercial Air Conditioners (Direct Expansion)
 - Packaged Terminal Air Conditioners
 - Rooftop Air Conditioners
- Air conditioners: Prices and Market Values
- Air conditioners: Supply
 - Room Air Conditioners
 - Window Room Air Conditioners
 - Portable/Mobile Air Conditioners
 - Split Air Conditioners
 - Mono-Split Air Conditioners

- Multi-Split Air Conditioners
- Variable Refrigerant Flow Air Conditioners
- Other Light-Commercial Air Conditioners (Direct Expansion)
 - Packaged Terminal Air Conditioners
 - Rooftop Air Conditioners
- furnaces
- heat pumps.
- **Section 7: Distribution**
 - Overall Patterns and Characteristics
 - Structure: Wholesaling/Merchanting Trades
 - Structure: DIY Retailing
 - Structure: Other Relevant Retail Trades
- **Appendix: Company Profiles**
 - Profiles of the leading manufacturers, importers and distributors of bathroom products, including national subsidiaries of international groups. These Profiles will be created on the database.

3.2 FORMAT

As mentioned above, both the USA and Canada will each have an individual report so that they may be separated if need be. However BRG CONSULT is proposing to offer the 2 studies as a “North American package”. Data will be entered into our database so that clients can add these new studies to their existing database services.

The studies will be published both in electronic format (PDF and interactive CD version) together with one paper copy per subscription.

4. METHOD AND TIMING

4.1 METHOD

BRG CONSULT's proven methodology for its multi-client studies is based on classic empirical industrial market research techniques including:

- research of relevant secondary sources in depth
- personal and telephone interviews with:
 - manufacturers
 - importers
 - distributors
 - official bodies.

The project will be managed from New Jersey by Edward Dinicola who will be involved in the interview programme. Overall project supervision will be the responsibility of Dominic Denison-Pender (Managing Director).

4.2 TIMING

BRG CONSULT will be launching the project mid-April with a view to delivering a final report at the end July.

5. PRICES

BRG CONSULT is proposing subscribers a price per order of:

- USA: £3,000 / \$5,250 / €4,425
- Canada: £3,000 / \$5,250 / €4,425
- USA + Canada package: £5,000 / \$8,750 / €7,375
- **Pre-Launch Package*:** **£4,500 / \$7,850 / €6,625**

Note*: Pre-launch package available until 15th May.

