



International  
Market  
Strategy



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



**July 2005**

**PROPOSAL FOR A SYNDICATED RESEARCH  
PROGRAMME ON CENTRAL, AIR AND  
WATER HEATING MARKETS  
IN FOUR LATIN AMERICAN COUNTRIES:**

- **ARGENTINA**
- **BRAZIL**
- **CHILE**
- **MEXICO**



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## **1. INTRODUCTION**

CONSULT GB is the leading provider of international industrial market research on domestic central and water heating products within the European framework. Its annual coverage of 30 countries in Europe has become a standard source of market information within the heating products industry.

Over the past decade, CONSULT GB has expanded the scope of its services in a number of ways, including a geographical widening of its multi-client research programme. This has already led to the completion of studies on the heating product markets in China, Japan, India, South Korea, Georgia, Azerbaijan, Argentina, Mexico, Chile and North America.

In 2002, CONSULT GB conducted its successful studies on the South American water heating and air conditioning products market in Brazil, Chile and Mexico. Following numerous request from its clients, CONSULT GB now plans an update of these studies and also a study of the market in Argentina.

South America represents a wide range of opportunities for domestic heating and water heating products, as its diversified nature provides scope for both high volume activities in areas such as Brazil for water heating and air-conditioning as well as targeted central heating system sales in countries such as Chile.

Therefore, CONSULT GB is pleased to present this proposal for an update of its multi-client programme to cover four of the Latin American markets.

## 2. GEOGRAPHICAL COVERAGE

Rather than attempting a pan-Latin American coverage, CONSULT GB is proposing to cover the four countries for which clients have shown the greatest interest: **Argentina, Brazil, Chile** and **Mexico**. In 2002, studies were carried out in Brazil, Chile and Mexico. For 2005, CONSULT GB has added Argentina to the list of countries. Given sufficient interest, the research could be widened to cover other countries in the region at a later date.

### **3. PRODUCT COVERAGE**

The product scope for this proposed survey would be based on CONSULT GB's current European coverage. This would therefore consist of:

- boilers (if applicable)
  - wall hung gas boilers
  - floor standing gas boilers
  - jet burner boilers
  - solid fuel/steam
- burners (if applicable)
- radiators (if applicable)
  - steel panel radiators
  - towel warmers
  - decorative steel tubular
  - aluminium radiator
  - convectors
  - cast iron radiators
  - other
- water heating
  - linked water heating
    - combi boilers
    - indirect cylinders
  - dedicated water heating
    - electric storage water heaters
    - electric instantaneous water heaters
    - electric showers
    - gas storage water heaters
    - gas instantaneous water heaters

- air conditioners
  - system air conditioners
    - mono split
    - multi split
    - rooftop
    - variable roof top
  - room air conditioners
    - window room
    - portable

- **Appendix: Company Profiles**

Profiles of the leading manufacturers and importers of heating and air-conditioning products, including national subsidiaries of international groups. These Profiles will be created on the database.

CONSULT GB would also identify any other heating products such as electric space heaters specific to the four proposed countries and attempt to define and quantify these markets.

## **4. CONTENT AND FORMAT**

### **4.1 CONTENT**

The overall content of the report will follow much the same lines as CONSULT GB's European heating reports so that they may be integrated into our database system. The report will contain all the quantitative and qualitative data relevant to a comprehensive market study. The following layout and content is therefore proposed:

- **Product/Market Summaries and Forecasts (“Yellow Pages”)** for each product family:
  - comments on recent market trends and developments
  - volume sales trends 1993-2004 and forecasts 2005-2009
  - 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 CONSULT GB's reports. They also form the heart of the interactive database and indeed they are now generated directly from the database

- **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
- **Section 2: Heating Products Market – Overview**
  - Total Heating Products Market

- Overall Structure of Supply
- **Section 3: Boilers and Burners (if applicable)**
  - Market Size, Trends and Characteristics
    - Historical Development and 2004 Market
    - Forecasts to 2009
  - 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 2004 Market
    - Forecasts to 2009

- Radiators: Market Analysis by Type of Water Heater
  - steel panel radiators
  - towel warmers
  - decorative steel tubular
  - aluminium radiators
  - convectors
  - cast iron radiators
- Radiators: Prices and Market Values
- Radiators: Supply (if applicable)
  - steel panel radiators
  - towel warmers
  - aluminium radiator
  - cast iron radiators

– **Section 5: Water Heaters**

- Water Heaters: Overall Market Size, Trends and Characteristics
  - Historical Development and 2004 Market
  - Forecasts to 2009
- 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 Conditioning**

- Air Conditioners: Overall Market Size, Trends and Characteristics
  - Historical Development and 2004 Market
  - Forecasts to 2009
- Air Conditioners: Market Analysis by Type of Air Conditioner
- system air conditioners
  - mono split
  - multi split
  - rooftop
  - variable roof top
- room air conditioners
  - window room
  - portable
- Air Conditioners: Prices and Market Values
- Air Conditioners: Supply
- system air conditioners
  - mono split
  - multi split
  - rooftop
  - variable roof top
- room air conditioners
  - window room

- portable

– **Section 7: Distribution**

- Overall Patterns and Characteristics
- Structure: Wholesale/Merchant Trades
- Structure: DIY Retail
- Structure: Other Relevant Retail Trades
- Distribution Flows
- Analysis of purchasing practices and routes to market

– **Appendix: Company Profiles**

Profiles of the leading manufacturers and importers of heating products, including national subsidiaries of international groups. These profiles will be created on the database.

**4.2 FORMAT**

The study would be delivered in report format (similar to other CONSULT GB reports) and also be incorporated into the database.

## **5. METHOD AND TIMING**

### **5.1 METHOD**

CONSULT GB'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 by Henry Carver who, along with other senior CONSULT GB staff, will be involved with the key interview programme. CONSULT GB may also require a certain degree of local knowledge and may call upon some of its outside contacts who already have a good deal of experience in the South American heating and air conditioning markets.

### **5.2 TIMING**

CONSULT GB is looking to provide its subscribers with a final report within 60 working days of its launch.

Before committing to the project CONSULT GB will be looking for a minimum of four advance subscriptions to cover the budget. It is therefore down to the speed of the subscriptions to determine the start date.

## **6. PRICES**

CONSULT GB would require the equivalent of 4 full subscriptions before committing to the research.

The price per subscription would be:

– 4 country package: £8 500.

Payment would request 50% of the cost to be paid at the start of the project and 50% upon completion.