

# Case Study: Market Assessment of Mid & High Rise Residential Air Movement & Control Products in India

## Client Detail:

- Headquartered in Wisconsin, US, the client is a leading manufacturer and supplier of air movement and control equipment that include fans, dampers, louvers, kitchen ventilation hoods, energy recovery and make-up air units
- The Client's equipment is used in all types of commercial, institutional, and industrial buildings in applications from comfort ventilation to manufacturing processes

## Business Situation:

- The client intended to develop a detailed understanding for its product portfolio within the application areas for mid and high rise residential building in India
- The client also wanted to understand the market potential and future outlook of various application areas for air movement and control products
- Further, it also aimed to understand the competitive landscape and MEP design trends and developments

## Assignment:

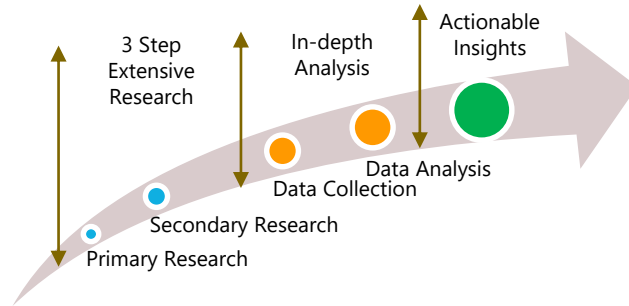
- The client approached Datamatics to conduct a detailed study on air movement and control products used in mid-high rise residential buildings in India

## Datamatics Solution:

- In order to achieve the desired objectives, Datamatics conducted a comprehensive research using a combination of secondary and primary research to execute this study
- Accordingly, Datamatics segregated the study into four phases:
  - **Phase I: Assessing the overall market situation** - High-level view of air movement & control products market for mid-high rise residential buildings in India covering market structure, trends and developments, Key government and environment regulations, etc.
  - **Phase II: Determining the market size**- This involved a detailed market assessment of the air movement & control products by application areas and key end use segments.
  - **Phase III: Evaluating the competitive intensity within the market** - Detailed competitive analysis along with product and application benchmarking and Porter's five forces analysis followed by profiling major suppliers
  - **Phase IV: Analyzing the market opportunity for MEP consultants** – This included in-depth understanding of the MEP design trends and developments in India's mid-high rise residential sector

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## Methodology:



## Approach:

- The entire engagement was structured in a manner that ensured comprehensive outcome, by conducting in-depth secondary research, validated from experts and backed by robust analysis
- Datamatics conducted in-depth secondary research to identify air movement & control products\ suppliers, assess the market size, future growth and outlook, trends and developments, etc.
- Semi structured interviews were conducted with key industry stakeholders to validate outcome of secondary research and also to gather missing information for further analysis

## Study Outcome:

- The study provided key insights on air movement and control products used in mid and high rise residential buildings in India
- Suggestion to develop strong relationship with MEP consultants and create a positive brand positioning for effective market expansion

## Project Plan:

- Datamatics identified the players operating across the value chain and devised a sample size to capture market feedback

Value Chain Stakeholder	No. of Interviews
Suppliers & Channel Intermediaries	15
Developers	10
MEP Service Providers	5
Industry Experts/ Associations	4
<b>Total</b>	<b>34</b>

## Analysis:

- The AMC products market for mid-high rise residences in India is expected to grow at a CAGR of 16% between 2015-20
- Tube axial fans, volume control dampers and backdraft dampers are the three most common products used
- India's AMC products market is highly fragmented with the presence of some large players and numerous smaller players
- MEP consultants form the most important part of the entire value chain