



“MARKET SIZING” CASE STUDY



ABOUT THE CLIENT	
Industry	Industrial Technologies
Revenues	Approx. \$10 billion
Employees	Approx. 50,000
Location	Global
BSI Service or Solution	Market Sizing

Key Challenges

- Intense price competition and low-cost production forced a close examination of market share, pricing, and profitability by finely dissected market sub-segment
- Information on market size and contract prices was unavailable by sub-product, industry, application, and geographic territory

Why BSI was Selected

- Industry expertise and previous engagements in seals, gaskets, and their applications, especially in rotating equipment
- Databases of market size by industry and of suppliers by product type
- Extensive pool of industry contacts by region and product segment
- Market sizing models

Project Scope

- Leaf seals, carbon ring seals, brush seals, gas insulated seals, hydrodynamic seals, labyrinth seals, O-rings, and elastomeric gaskets
- Applications in gearboxes, motors, blowers, pneumatic tools, electrical components, agricultural and construction equipment, pumps, and compressors
- Global with regional splits
- OEM and aftermarket channels

Project Approach

- Market size modeling
- Breakdown of market size by geography, industry distribution channel, application, and competitor
- Profiling of Top 10 market segments
- Profiling of Top 10 competitors in each segment
- Identification of market capture strategies

Operational Benefits Realized

- Recalibrated regional sales and marketing strategy
- Supplementary marketing and sales resources, which were justified by the results of the study

Financial Benefits Realized

- 15% increase in addressable revenue potential achievable through a series of targeted marketing and sales campaigns