BOSTON STRATEGIES INTERNATIONAL
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"MARKET SIZING" CASE STUDY



ABOUT THE CLIENT	
Industry	**Industrial Sealing Technologies**
Revenues	**$3 billion**
Employees	**20,000**
Location	**Europe/North America**
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 were available by sub-product, industry, application, and geographic territory

Why BSI was Selected

- Prior experience and studies 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
- North America, Europe, and World
- OEM and distributor markets

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

- BSI's report and underlying data provided the justification for supplementary marketing and sales resources

Financial Benefits Realized

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