

CHALLENGE

The market for auxiliary heaters is characterized by a duopoly – essentially two manufacturers dominate the global market. In addition, the aftermarket within Europe is marked by different trade structures in the automotive industry: whereas in Germany the aftermarket is supplied solely by the wholesale trade, direct sales from the manufacturer still play a role in the rest of Europe.

The challenge of a market analysis led therefore to an array of methodological measures to collect sell-in data. In addition to a primary survey with the two manufacturers to collect data on the quantity of goods sold in the aftermarket, the focus of the analysis centered on quantitative interviews with wholesalers, auto dealers, and repair shops.

METHODOLOGY

As part of the overall market analysis, the survey was separated into three parts: a survey with the manufacturers to collect sell-in data by product group in the individual countries under investigation; telephone interviews with wholesalers in the individual countries to determine their sales volume; and interviews with relevant auto dealers and repair shop chains to determine their purchasing volume of auxiliary heaters as well as to evaluate trends in the upgrading of auxiliary heaters. The data collected from these three sources were correspondingly offset in order to ultimately determine the market volume for auxiliary heaters in the aftermarket.

RESULTS

The results of the study not only provided important information regarding the market volume and different penetration rates of auxiliary heaters by country, it also showed where the demand was going to be in different product groups and customer segments (automobiles, campers, etc.).

In addition to information on market volume and expected market development, the study also analyzed the market shares of the two manufacturers across the entire market as well as broken down by product group, customer segment, and their developments over the last several years.

WHY INTERCONNECTION

- Long-standing experience in B2B market research
- Methodological and branch expertise
- Company interview center with native speakers providing necessary language expertise

We are always glad to answer
any questions you may have!

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