

Industry Studies Current Publications 2010

BIS Shrapnel's wide range of reports draws on the company's two core competencies: market research and forecasting. No other firm in Australia enjoys our pre-eminent reputation in both of these complementary fields of research.

www.bis.com.au

Industry Studies

Current Publications 2010

BIS Shrapnel's reports provide reliable, in-depth information on industries and markets, as well as thorough analysis of economic drivers and clearly explained forecasts. Formed in 1964, BIS Shrapnel has built extensive expertise across a broad spectrum of industry sectors and geographic regions, and has developed a large portfolio of research methodologies, all of which we continue to expand.

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ECONOMY

Economic Outlook

Monitors developments in the Australian economy and their impact on prospects for business 18 months ahead. Provides forecasts for economic and business indicators. Includes two invitations to our twice-yearly Business Briefings on the economy plus a subscriber enquiry service. Monthly.

Long Term Forecasts, 2010 – 2025

Examines prospects and fundamental trends for the Australian economy on a very detailed level, with forecasts for the next 15 years. Annual with a 6 month update.



BUILDING AND CONSTRUCTION

Building Industry Prospects

Forecasts short-term building activity by sector for the next 18 months in Australia, by state. Includes two invitations to our twice-yearly Business Briefings on the building and property markets plus a subscriber enquiry service. Monthly.

Building in Australia, 2010 – 2025

Examines current conditions and future drivers of residential and non-residential construction at the state level and for the nation. Details medium to long-term prospects and trends, providing 15-year forecasts by type of building activity for each state. Annual.

Regional Residential Building

Analyses trends and prospects in demand and supply for residential building in regional areas in the eastern states. Published every 6 months.

Work Done Forecasts of Building Activity

Forecasting and monitoring service on work done in the non-residential building sector. Residential service also available. Biannual with forecasts for the next 2 years and a 5 year forecast available annually.

Residential Builder Panel, 2009

Examines current and future demand for building materials and fittings in new dwellings, such as roofing, guttering, external cladding, internal

linings, insulation, paving, windows, fencing, flooring and plumbing fittings. 10 volumes.

Building Materials in Non-Residential Building, 2010

As above, but for commercial, industrial, social and institutional building.

The Home Improvements Market in Australia, 2010

Examines the alterations and additions market, by project type and state. 16 volumes.

Building and Construction in New Zealand, 2009/10 – 2015

This report provides 5 year forecasts for residential building, non-residential building and engineering construction activity. Annual report, update and Auckland workshop.

Building and Construction in Asia, 2009/10 – 2015

Survey of 9 Asia-Pacific countries with 5 year forecasts for residential building, non-residential building and engineering construction activity. Annual report and update. 9 volumes.



RESIDENTIAL PROPERTY

Residential Property Prospects: Australian Capital Cities, 2010 – 2013

Provides annual median house price forecasts to June 2013 for Australian capital cities. Examines market conditions, forecasts interest rates, home loan affordability, rental growth and yields. Annual with a 6 month update.

Inner City Apartment Markets, 2010 – 2017

- Inner Sydney
- Inner Melbourne
- Inner Brisbane

Provides detailed demand analysis of both buyers and tenants of inner city apartments. Each study analyses new and re-sale patterns and includes a comprehensive survey of occupiers to determine apartment demand, forecasting rents and values.

Residential Land Market Outlook for Demand and Supply, 2010 – 2015

Analyses the 5 year outlook for broadhectare land, housing demand, dwelling commencements, and lot production trends. Available for 7 major metro areas.

Emerging Trends in Residential Demand From First Home Buyers, Upgraders, Empty Nesters and Retirees

A comprehensive overview of the demographic changes in these segments that are taking place across each of the states, and their consequent impact on demand by type of dwelling from 2006 to 2016.



COMMERCIAL PROPERTY

Commercial Property Prospects, 2010 – 2020

- Sydney CBD and metro
- Sydney Suburban Centres and Office Parks
- Melbourne CBD and metro
- Melbourne Near City and Suburban Offices
- Brisbane CBD and Near City
- Perth CBD and metro
- Adelaide CBD and metro
- Canberra CBD and metro

Provides forecasting and strategies for the CBD and metropolitan office markets. Annual with a 6 month update.

Retail Property Market, 2010 – 2020

Examines demand and supply factors, city by city, as well as the major changes occurring in the retail industry, and assesses their impact on the performance of regional and sub-regional shopping centres. Annual.

Bulky Goods Retailing, 2009 – 2014

Assesses the current status of bulky goods retailing in Australia. Provides forecasts of consumer demand by sub-sector and by state over the next 5 years and, by bringing in supply side forecasts, assesses future market balance and likely rental growth. Annual.

Industrial Property Market, Strategies and Prospects, 2010 – 2020

- Sydney
- Melbourne
- Brisbane

Examines the drivers of demand for industrial property and identifies the prospects for rents, yields, prices and investment returns in the major industrial regions of each city over the next decade. Annual.

Eastern Seaboard Hotel Market, 2010 – 2020

Our comprehensive study on the eastern seaboard hotel sector assesses the outlook for hotel demand, supply, room rates and investment returns. Focusing on the 4 and 5 star accommodation markets, the study considers the key risks to market participants over the next 10 years.



INFRASTRUCTURE AND MINING

Engineering Construction in Australia, 2009/10 – 2023/24

Examines underlying influences on the engineering construction cycle, with detailed forecasts for 12 sub-sectors of construction by state. Annual.

Mining and Heavy Industry Construction Supplement, 2009/10 – 2023/24

Provides historical data and separate forecasts for oil/gas, coal, aluminium supply chain, other minerals and other heavy industry. Annual.

Road Construction in Australia, 2009 – 2024

Provides historical data for all sub-sectors of road construction, plus forecasts, for each state and territory. Annual.

Road Maintenance in Australia, 2009 – 2024

This is the only source of detailed historical data, forecasts and analysis for Australia's \$4 billion road maintenance sector. The report provides road maintenance activity, broken down by type of road and type of maintenance work. Annual.

Road and Bridge Construction Cost Quarterly

A quarterly bulletin service providing the latest official data on road and bridge construction and input prices, with a 5 year annual forecast of the road and bridge construction cost index.

Maintenance in Australia, 2008 – 2023

The most comprehensive market study available for Australia's maintenance sector. The report covers all types of infrastructure, utilities, light and heavy industrial facilities and non-residential buildings. It contains detailed market data and forecasts, along with discussion of key issues facing purchasers of maintenance services. Biennial.

Mining in Australia, 2009 – 2024

Our comprehensive report on the mining sector, including new forecasts of construction, investment, contract mining, maintenance, exploration, commodity prices and production. Annual.



FORESTRY

Sawn Timber in Australia, 2008 – 2022

Forecasts of sawn timber production, consumption, prices and excess capacity for each Australian state. Structured interviews with over 400 timber merchants, distributors, builders, truss and frame manufacturers and informal discussions with government, research authorities and trade organisations. Includes a global overview, industry structure overview and current issues facing the industry. Biennial with 15-year forecasts.

Oriented Strand Board (OSB) and Lumber (OSL) in the Pacific Rim and Europe, 2008 – 2013

The report combines market research and forecasts to provide a strategic analysis of the prospects for OSB and OSL products in the Pacific Rim and Europe.

Medium Density Fibreboard in the Pacific Rim and Europe, 2009 – 2013

Combines research and economic forecasting to project MDF production, consumption, trade flows and prices in the Pacific Rim and Europe. Biennial with 5 year forecasts.

Particleboard in the Pacific Rim and Europe, 2009 – 2013

Combines market research and economic forecasting to project particleboard production, consumption, trade flows and prices in the Pacific Rim and Europe. Biennial with 5 year forecasts.

Structural Engineered Wood Products in the Pacific Rim and Europe, 2009 – 2013

Combines market research and economic forecasting to project LVL, LSL, glulam and I-beam production, consumption, prices and export capacity in the Pacific Rim and Europe. Biennial with 5 year forecasts.



HOUSEHOLD APPLIANCES AND POWER TOOLS

The Household Appliances Market in Australia, 2010

Biennial survey of 4,000 households examining consumer buying behaviour and attitudes to appliances brands. Also a face-to-face survey of 250 electrical retailers, covering their attitudes to leading brands.

The Barbecues Market in Australia, 2009

This study of 4,000 Australian consumers contains a market overview (including market size data), brand analysis, demographic and retailer data for the domestic barbecues market in Australia. ▶▶

Private Client Services

As well as producing the range of multi-client industry studies listed herein, we also regularly undertake commissioned research projects for individual clients.

In performing these private client assignments we build upon our base of existing research and forecasts, using methodologies developed to tackle specific issues faced by our clients. Through careful analysis and consideration of the implications of our research, we provide insights which greatly assist planning and business decision-making.

Our private client projects traverse a wide variety of topics and research approaches. Typical assignments can include services such as:

- forecasting demand for products and services
- market risk assessment
- financial feasibility assumptions
- preparation of prospectus materials
- financial and economic evaluations and submissions
- qualitative and quantitative research
- gathering market data and segmentation information
- measuring customer satisfaction and reputation
- strategic planning assistance
- private briefings and workshops

The Power Tools Market in Australia, 2009

A comprehensive study of 4,000 Australian households on the power tools market. A detailed analysis of each product is provided, including: consumer profile, market share of leading brands, DIY versus professional purchases, price point data, drivers of brand selection and share of purchase by state.

Energy Efficiency and Water Saving in Australian Households, 2008

This report provides:

- A detailed analysis of households attitudes towards a range of energy efficient and water saving products and initiatives
- Measurement of attitudes and opinions towards relevant issues
- Covering: renewable energy, gas hot water, solar hot water, washing machines, dishwashers, heating appliances, cooling appliances and water saving devices.

Appliances Installed in New Dwellings, 2007

Survey of new residential builders covering current and future trends. Data includes product type installed, brand data and decision makers. Covers kitchen appliances, hot water systems and climate control products.

PAPER AND PACKAGING

Paper and Board Packaging in Australia, 2009 – 2010

200 interviews covering supply and demand for all types of paper and board packaging. Annual.

Plastics Packaging in Australia, 2008 – 2010

Over 350 interviews with suppliers and users, examining each packaging type and material. Volume 1: Rigid Packaging, Volume 2: Flexible Packaging. Biennial.

FOODSERVICE

Australian Foodservice

Continuous Information Service

General foodservice trends and developments, regional foodservice market conditions, BIS Foodservice Confidence Index, R&G Coffee Barometer, market prospects and outlook,

Individual channel characteristics and market drivers, product and customer service requirements, the importance of sales and distributor representatives, tracking of major distributor reputation, tracking of Internet usage in the foodservice market, healthy eating in foodservice, brand analysis and awareness, communication and promotion in foodservice, packaging in foodservice, distribution and supplier choice in foodservice.

The Foodservice Consumer Tracking Study

Eating out preferences and trends, eating out occasions, cuisine trends, average spend per meal, the economic environment's impact on eating out, other topical issues.

New Zealand Foodservice *Continuous Information Service*

General foodservice trends and developments, regional foodservice market conditions, BIS Foodservice Confidence Index, R&G Coffee Barometer, market prospects and outlook, Individual channel characteristics and market drivers, product and customer service requirements, the importance of sales and distributor representatives, tracking of major distributor reputation, tracking of Internet usage in the foodservice market, healthy eating in foodservice, brand analysis and awareness, communication and promotion in foodservice, packaging in foodservice, distribution and supplier choice in foodservice.

The Foodservice Consumer Tracking Study

Eating out preferences and trends, eating out occasions, cuisine trends, average spend per meal, the economic environment's impact on eating out, other topical issues.

Coffee in Australia, 2009

The report addresses general trends and developments in Australians' consumption of coffee, the outlook for the café market, market size as well as total market for coffee machines by channel.

Fast Food in Australia, 2009

The report addresses Australians' total fast food consumption, consumer profiles and preferences, trends and developments in this market, eating habits, chain ratings and growth prospects for fast food.

Middle East Foodservice, 2010

- United Arab Emirates

- Kingdom of Saudi Arabia
- The Gulf States – Bahrain, Kuwait, Oman & Qatar.

Market characteristics, key market drivers, foodservice market trends, outlook.

Foodservice in South East Asia, 2009

- Malaysia
- Singapore
- Thailand
- Vietnam
- Philippines
- Indonesia

Key trends and developments, market drivers, market prospects, market size, brand analysis as well as regional overview.

Beverages in Australia, 2008

Uncovers Australians' total non-alcoholic beverages consumption and preferences at home, at work and away from home.

Australian Foodservice Equipment, 2006 – 2009

Examines the Australian market for foodservice equipment, including market size estimates.

Foodservice Omnibus – Australia

An instrument for private studies in Australia.

Foodservice Omnibus – New Zealand

An instrument for private studies in New Zealand.

Foodservice Challenges

Issues based series of reports.

Foodservice in the China Region, 2010

- China
- Hong Kong
- Taiwan

Key trends and developments, market characteristics, market drivers, brand analysis and market outlook.

Route Trade in Australia, 2010

Route industry measures, market size database, channel insights, brand analysis, distribution in the route trade market, market outlook.

Route Trade in New Zealand, 2010

Route industry measures, market size database, channel insights, brand analysis, distribution in the route trade market, market outlook.

BIS Shrapnel would like to keep you informed of upcoming industry related studies and conferences via email.

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