



Intelligent
Consultancy



Who are **BDS**

BDS is the leading independent consultancy in Great Britain offering unparalleled knowledge and expertise in the heavy building materials (including aggregates, asphalt, ready mixed concrete, cement and concrete products) and waste sectors.

Established over thirty years ago BDS offer a range of research services to help clients maximise their opportunities, develop their businesses and better understand their markets at both an operational and strategic level.

The work of BDS is divided into three streams, Planning, Reports and Consultancy. This leaflet highlights and provides some examples of the consultancy work carried out by BDS.





What can **BDS** offer?

BDS provide a bespoke and confidential consultancy service for clients. The work of BDS focuses on research activities within a wide range of markets. Tasks are designed and developed to support you and your team in meeting your individual business goals.

BDS will work hand-in-hand with you to understand your project requirements. Before commencing any work BDS will prepare a fully costed project brief with agreed deliverables and timelines for your consideration.



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Industry Sector Surveys

BDS Industry sector surveys are designed to deliver an up-to-date, high-level overview of a particular subject or sector area.

They provide a broad understanding of an area of interest and can include:

- Market insight (often for a specific geographic area)
- Market size
- Companies operating within the market
- Company product review and fragmentation analysis
- Identification of end-uses and potential sub-sectors
- Routes to market
- Opportunities
- Future trend analysis pinpointing impacts, influences, risks and growth drivers.

Case Study

A major concrete products manufacturer commissioned a research study into the Landscape Protection market.

The aim of the research was to provide a clear understanding of the market helping to ensure the client was aware of its competitors, was informed of potential new market areas & products and external socio and political impacts. The findings have helped the manufacturer further develop its product portfolio in addition to being able to respond quicker than competitors to meet external needs.

Prospects for new investments

BDS work alongside clients seeking to establish new production facilities in one or more product areas.

A typical project may include:

- Identifying the geographical market area for the new facility
- Local and national market size and trends
- Review of competitor locations and production outputs
- Market share analysis
- Local planning and site development activity
- Review of long-term economic development and growth in the market area including expected major infrastructure, housing, commercial and industrial projects
- Achievable projected volumes for the new facility, market forecast and other relevant factors.

Case Study

BDS was commissioned by an established independent producer of aggregates and ready mixed concrete in the East of England to undertake a market area study to support a proposal for the development of a consented sand and gravel reserve in a neighbouring region.

Case Study

An independent asphalt producer seeking to expand its market coverage asked BDS to identify a new geographical market in which to establish an asphalt plant suitable for its production model and target market. BDS helped the client to pinpoint the ideal location and delivered a full supporting analysis of the market. This provided the client with the confidence to proceed with the planning process for a new plant and subsequent construction and operation.

Market Size Assessment & Analysis

BDS works closely with product manufacturers, with a strong national presence in their existing markets, who are looking to expand into new markets or market areas. BDS recognise this can be a challenging period and, in these instances, will act as an independent research partner to deliver an in-depth objective analysis of the identified market. An independent overview helps to ensure the client can make an accurate evaluation of the new opportunity and informed decisions moving forward.

Case Study

A national materials supplier who was familiar with operating in the supply of raw materials into industrial and energy markets, was seeking to exploit an opportunity to supply aggregates into the construction sector. The research provided by BDS focused on supplying the client with a detailed assessment of the aggregates market and how it operates on a national, regional and local level. The work also included identifying existing producers, market shares and volumes, product mix, end-uses, barriers to entry, customer base, downstream activities and the impacts of external influences on the industry including environmental, planning, political and carbon-related issues. The market analysis helped the client to understand its proposed new market and move ahead with developing future opportunities.

Case Study

A global company, having acquired a multi-disciplinary business, needed to understand the other product markets it now found itself operating in as a result of the acquisition. BDS supported the client by reviewed each of the new markets enabling the new parent to fully understand the products, manufacturers, size, locations, developments, market health and other relevant attributes. This enabled to client to make decisions regarding divestments and future investment in the new market areas.



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Business Growth & Acquisition Proposals

Business growth can ensure a greater geographical market presence and / or provide increased markets for existing products. It can be achieved through the development of innovative products, new production facilities, via the acquisition of competitor businesses or via downstream activities. BDS can provide an understanding the market to subsequently help define areas of new growth, development and opportunity.

Case Study

A leading regional producer of primary aggregates was keen to diversify through vertical integration into new markets to help increase its production volumes. BDS carried out a market review and investigation to assess and report on a number of geographical markets and product sectors for the establishment of an identified network of ready mixed concrete and asphalt plants. The client was also keen on obtaining direct feedback from its customers and BDS was able to provide this as part of the overall work.

Case Study

A global developer of Energy-from-Waste (EfW) plants, disposing of household and commercial waste, with plans to develop a network of facilities in Great Britain required an understanding and assessment of the opportunities in producing secondary aggregates. The EfW process involves the production of both incinerator ash (IBA) and air pollution control residues (ACPR's), both of which are processed into substitutes for primary aggregates. BDS undertook a comprehensive study of each material identifying existing facilities and proposed developments, producing companies, market size and shares, products manufactured and end-use markets, existing business relationships and tie-ins and competing products. The findings from the work allowed the EfW developer to add in a revenue stream to support its investment in its core activities of waste disposal and energy production.

Product Review & Development

BDS support clients in reviewing existing market sectors to identify threats and opportunities for development, change and growth. Drivers for these studies are typically the increasingly changing political, social and environmental climate seen through the need for greater sustainability and greener credential for products and companies, reduced carbon impact and shifts in customer behaviour and requirements

Projects of this nature will often include:

- Current state of the market
- Identifying manufacturers, production plants and capabilities
- Defining market size, trends, product range, investment proposals and new developments

Case Study

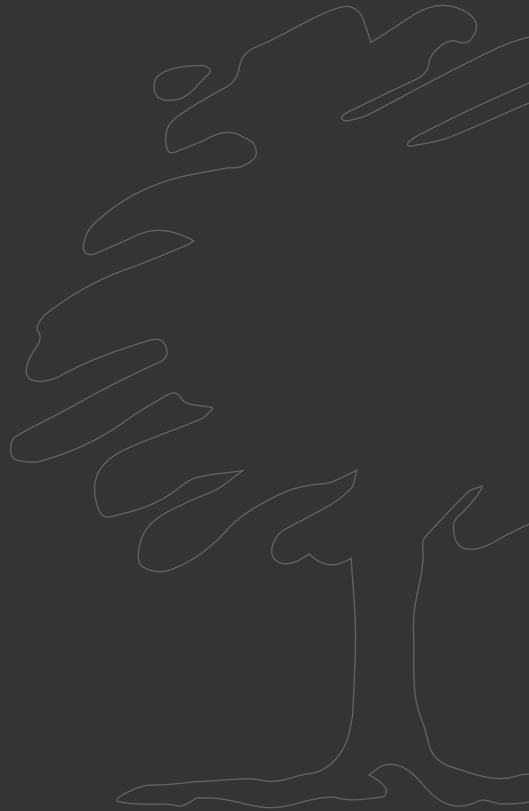
An existing global company sought a review of the markets supplied by its concrete products division to assess its ability to service an identified sub-market as having long-term growth potential due to changing environmental factors. BDS delivered an assessment of the existing market and the factors that were influencing its change and how the company could best respond. Analysis of competitor activity, government legislation, the planning process, climate change and other factors was undertaken by BDS to ensure the business client could invest, develop products and to respond more speedily and effectively ahead of its competitors.

Other Industrial Market Research

BDS primarily focus on market research associated with the Heavy Building Materials (HBM) markets such as aggregates, ready mixed concrete, asphalt, concrete products cement and associated products, and the Waste industry. However, many of our clients are multi-disciplinary companies with manufacturing interests in markets outside of this scope which can lead us to providing them with support and research into new markets areas. Where this has happened, BDS have consistently proven the analytical skills, knowledge gathering, and research abilities of the team are transferable skills that can add significant value to either understanding a client's specific needs and/or supporting an existing client in developing their business in other market areas.

Case Study

A global company involved in HBM markets commissioned BDS to undertake a review of the housing and meter box market in Great Britain. Already with an established, albeit relatively low-level, presence in the market, the client was looking to consider opportunities for product development and production expansion in direct response to changes in legislation regarding energy supply into homes and the increasing requirement for the charging of householder's electric cars. Working closely with the client, BDS was able to provide a comprehensive assessment of the domestic market for the products as well as examining changes globally. Using the research provided by BDS the client was able to review investment and research budgets in a significantly better way to ensure they were able to get to market quicker than those selling similar products.



Other work of **BDS**

Intelligent Reports

BDS has been publishing industry reports for three decades covering a wide range of market sectors in Great Britain. The majority of these are updated either annually or bi-annually.

These include: -

- Estimated outputs and market share reports covering
 - pits, quarries and marine wharves
 - asphalt
 - ready mixed concrete (batched and volumetric)
 - building blocks
 - concrete block paving
 - paving slabs
 - aggregates rail depots
- Estimated reserves of Pits and Quarries
- State of the Industry - Annual Aggregates Replenishment
- Sector overview surveys of the aggregates, asphalt, cement, concrete products, ready mixed concrete and waste markets
- Analysis of the recycled aggregates industry
- Directories of waste facilities including EfW, AD, MRF, MBT, Composting, HWRC

Intelligent Planning

BDS monitor planning activity for each of the 400+ planning authorities across Great Britain, Northern Ireland and the Republic of Ireland.

The service is available via annual subscription which includes access to the BDS Planning Portal and monthly market activity reports (in PDF and Excel). You can set alerts and track the progress of existing schemes helping to ensure you maximise the return on your investment in the service.

The information provides existing operators with direct information on competitor activity while at the same time offering suppliers the opportunity to develop new sales of their products and services.

How to contact us

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