

# MULTICLIENT STUDIES PRESENTATION

## AUTOMOTIVE SECTOR IN ROMANIA

*Markets:*

- **VEHICLE AIR CONDITIONING SYSTEMS AND PARTS**
- **MINIBUSES**
- **TEMPERATURE CONTROLLED TRANSPORTATION**



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## Introduction

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ADMIS Advisors is a full service marketing research consultancy providing support to companies in a wide range of industry and services sectors (including the automotive sector), from Romania and from abroad.

A new line of business developed by our company is focused on providing multiclient studies in high potential sectors in Romania. We thus identify and assess supply and demand features and dynamics, which are afterwards synthesized in comprehensive reports made available to interested customers at a relatively low price (as compared to dedicated studies).

Currently, we are preparing 5 multiclient studies focused on the automotive sector in Romania, which will be available from May 2007:

- Vehicle air conditioning systems and parts market overview
- Usage and purchasing patterns, customer's perception and decision making criteria used on the market for vehicle air conditioning systems and parts
- Minibuses market overview
- Usage and purchasing patterns, customer's perception and decision making criteria used on the market for minibuses
- Temperature controlled transportation market overview

Should your company be interested in relevant information on the aforementioned markets in Romania, please spare a few minutes of your time for the brief presentation of these reports on the following pages.

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## REPORT 1 - VEHICLE AIR CONDITIONING SYSTEMS AND PARTS MARKET OVERVIEW

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<b>General Information</b>	<b>Type of study / Year</b>	Sector Study / Information gathered in year 2006
	<b>Format</b>	60 – 65 pages / English / PDF document
<b>Brief Methodology</b>	Desk Research and 20 Face-to-Face Interviews with Key Market Participants (suppliers, industry experts, etc.)	

### Table of Contents

- 1 Project Background and Objectives**
- 2 Methodology and Limitations of the Sector Study**
- 3 Profiling of the Romanian Vehicles Market**
  - Overall evolution of the Romanian vehicles market
    - Evolution of vehicles production & assembly in Romania (2000-2005)
    - Evolution of vehicles exports from Romania (2000-2005)
    - Evolution of vehicles imports in Romania (2000-2005)
    - Evolution of overall vehicles sales in Romania (2000-2005)
  - Analysis of main vehicle brands sold in Romania (2000-2005)
    - Market shares for domestic vehicle brands sold in Romania (2000-2005)
    - Market shares for imported vehicle brands sold in Romania (2000-2005)
  - Analysis of second-hand vehicle sales in Romania (2000-2005)
    - Analysis of new vs. second-hand vehicles sales in Romania (2000-2005)
  - Further analysis of the Romanian vehicles market in 2005
    - Identification of purchasing methods used on the Romanian vehicles market in 2005
    - Analysis of diesel vs. petrol passenger car sales in Romania in 2005
- 4 Supply Side Analysis**
  - Overview
  - Import / Export information
  - Profiling of top 5 importers of vehicle air conditioning machines
  - Profiling of main 5 importers of parts of vehicle air conditioning machines
  - Profiling of other major players on the Romanian market for vehicle air conditioning kits and parts
  - Profiling of main brands of vehicle air conditioning
  - Estimated size of the vehicle air conditioning machines market
  - Pricing
- 5 Demand Side Analysis**
- 6 Operational Aspects related to the Vehicle A/C Market in Romania**
  - Stock keeping practices vs. order placement and delivery times
  - Warranty
  - Reconditioning practices for air conditioning kits and parts
  - Specialization and trade channels
  - Other investigated aspects related to the market for vehicle air conditioning kits and parts in Romania
- 7 Market drivers**
- 8 SWOT analysis of the market for vehicle air conditioning kits and parts in Romania**
- 9 Forecasted evolution of the Romanian market for vehicle air conditioning kits and parts**
- 10 Key research findings and conclusions**

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**Price** (VAT excluded)

**EUR 540**

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## REPORT 2 - USAGE AND PURCHASING PATTERNS, CUSTOMER'S PERCEPTION AND DECISION MAKING CRITERIA USED ON THE MARKET FOR VEHICLE AIR CONDITIONING SYSTEMS AND PARTS

<b>General Information</b>	<b>Type of study / Year</b>	Quantitative Survey / Fieldwork undertaken in year 2006
	<b>Format</b>	40 - 45 slides / English / PDF document
<b>Brief Methodology</b>	Computer Assisted Telephone Interviews (CATI) with 100 General Managers / Supply / Procurement Managers within franchised / independent workshops	

### Table of Contents

#### **1 Project Background, Objectives and Methodology**

#### **2 Profiling of interviewed workshops from the perspective of their involvement in the A/C kits & parts market for vehicles in Romania** (by affiliation, contracted car make(s), specialization, etc.)

#### **3 Usage of A/C kits & parts within interviewed workshops; supply patterns and satisfaction with main suppliers**

- Usage of new vs. reconditioned A/C kits & parts in interviewed workshops
- Supply sources used by interviewed workshops for sourcing A/C kits & parts for vehicles
- Top 5 A/C kits & parts brands / suppliers currently used by interviewed workshops
- Average satisfaction degree with main brands / suppliers of A/C kits & parts used
- Stock keeping practices for A/C kits & parts within interviewed workshops
- Waiting period for sourcing A/C kits & parts, by supply source
- Incidence of cars on which repairs were conducted on the A/C system in the total number of cars serviced
- Replacement of the full A/C system/kit vs. replacement of parts of the A/C system
- Repairs on A/C systems of vehicles for corporate customers that bring along the needed parts / the full kit
- Repairs on A/C systems of vehicles for individual customers that bring along the needed parts / the full kit
- Warranty period for repairs made to A/C systems for vehicles
- Warranty period for new A/C kits & parts for vehicles
- Warranty period for second hand A/C kits/parts for vehicles
- Most often used payment conditions for purchases of A/C kits & parts for vehicles
- Restrictions imposed by contracted car manufacturers related to A/C kits & parts for vehicles
- Collection of replaced A/C kits/parts by insurance companies
- Existence of agreements with insurance companies that restrict the type / brand / supplier of A/C systems / parts to be used
- Existence of exclusivity contracts signed with suppliers of A/C kits / parts
- Types of exclusivity contracts signed with suppliers of A/C kits / parts

#### **4 Customer's perception on A/C kits & parts and decision making criteria used for selecting A/C kits & parts**

- Corporate customers quality perception on reconditioned A/C kits and parts for vehicles
- Individual customers quality perception on reconditioned A/C kits & parts for vehicles
- Main decision making criteria used for selecting A/C kits / parts suppliers
- Main decision making criteria used by final customers when repairing the A/C systems on their vehicles
- Existence of uncovered needs related to A/C kits & parts
- Main uncovered needs mentioned by interviewed workshops

#### **5 Demographic profile of interviewed companies**

**Price** (VAT excluded)

**EUR 490**

## REPORT 3 – MINIBUSES MARKET OVERVIEW

<b>General Information</b>	<b>Type of study / Year</b>	Sector Study / Information gathered in year 2006
	<b>Format</b>	35 – 40 pages / English / PDF document
<b>Brief Methodology</b>	Desk Research and 20 Face to Face Interviews with Key Market Participants (suppliers, industry experts, etc.)	

### Table of Contents

- 1 Project Background and Objectives**
- 2 Methodology and Limitations of the Sector Study**
- 3 Profiling of the Romanian Passenger Transportation Vehicles Market (2000 – 2005)**
  - Overview
  - Overall evolution of minibus and bus imports
  - Analysis of main minibus makes and models sold in Romania (2000-2005)
  - Analysis of bus brands sold in Romania (2000-2005)
  - Breakdown of the overall market size for minibuses by status at homologation (2001 – 2005)
  - Analysis of passenger transportation in Romania
- 4 Body-Building Services**
  - Overview
  - Profiling of major body-builders active in Romania
- 5 Demand side analysis**
- 6 Legal Framework for Passenger Transportation in Romania – The Main Market Driver for the Minibuses Market in Romania**
- 7 SWOT Analysis of the Market for Minibuses in Romania**
- 8 Forecasted Evolution of the Romanian Market for Minibuses**
- 9 Key Research Findings and Conclusions**

**Price** (VAT excluded)

**EUR 440**

## REPORT 4 - USAGE AND PURCHASING PATTERNS, CUSTOMER'S PERCEPTION AND DECISION MAKING CRITERIA USED ON THE MARKET FOR MINIBUSES

<b>General Information</b>	<b>Type of study / Year</b>	Quantitative Survey / Fieldwork undertaken in year 2006
	<b>Format</b>	40 - 45 slides / English / PDF document
<b>Brief Methodology</b>	Computer Assisted Telephone Interviews (CATI) with 100 General Managers / Supply / Fleet Managers within companies that use minibuses	

### Table of Contents

#### 1 Project background, objectives and methodology

#### 2 Profiling of interviewed companies by usage of minibuses and structure of minibuses fleet by make & model and number of seats

- Main uses of minibuses owned / leased by interviewed companies
- Usage of minibus makes
- Number of minibuses used by interviewed companies (for the overall fleet and for major minibus makes)
- Breakdown of the total number of minibuses used by interviewed companies, by make
- Usage of minibus models
- Usage of minibuses, by number of seats
- Breakdown of the total number of minibuses used by interviewed companies, by number of seats
- Average number of minibuses used by interviewed transportation companies, by routes serviced

#### 3 Minibus purchasing and usage habits

- Evolution of the total number of minibuses used by interviewed companies (2004-2005)
- Future evolution of the total number of minibuses used by interviewed companies
- Currently used minibuses, by situation at purchase/lease
- Currently used minibuses, by sourcing pattern
- Currently used minibuses, by financing method
- Future purchases of minibuses, by situation at purchase/lease
- Future purchases of minibuses, by sourcing pattern
- Future purchases of minibuses, by financing method
- Additional facilities that currently used minibuses are endowed with
- Main body builders that interviewed companies have worked with in the past 3 years
- Average satisfaction degree with services of body builders used
- Existence of a maximum time or mileage limit for the usage of minibuses within interviewed companies
- Type of maximum limit for the usage of minibuses within interviewed companies
- Identified time limits for the usage of minibuses
- Identified mileage limits for the usage of minibuses

#### 4 Perception on the market supply for minibuses, decision makers and decision making criteria

- Satisfaction degree with the supply of minibuses currently available on the Romanian market
- Main decision makers involved in the decision making process for minibus purchases / leasing
- Main decision making criteria used for purchasing / leasing minibuses
- Existence of uncovered needs related to the supply for minibuses in Romania
- Main uncovered needs mentioned by interviewed companies

#### 5 Demographic profile of interviewed companies

<b>Price</b> (VAT excluded)	<b>EUR 490</b>
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## REPORT 5 - TEMPERATURE CONTROLLED TRANSPORTATION MARKET OVERVIEW

<b>General Information</b>	<b>Type of study / Year</b>	Sector Study / Information gathered in year 2006
	<b>Format</b>	80 – 85 pages / English / PDF document
<b>Brief Methodology</b>	Desk Research and 20 Face to Face Interviews with Key Market Participants (suppliers, industry experts, etc.)	
<b>Table of Contents</b>		

### 1 Project Background and Objectives

### 2 Methodology and Limitations of the Sector Study

### 3 Profiling of the Romanian Commercial Vehicles Market

- Overall evolution of the Romanian commercial vehicles market (2000 – 2005)
- Evolution of the number of homologated auto vehicles by type (2000 – 2005)
  - Evolution of the total number of homologated commercial vehicles by type (including temperature controlled vehicles) (2000 – 2005)
  - Evolution of the number of homologated temperature controlled commercial vehicles by type (2000 – 2005)
- Analysis of main commercial vehicle makes sold in Romania (2000 - 2005)
  - Market shares for light commercial vehicle makes (< 3.5 t) sold in Romania (2000 - 2005)
  - Market shares for commercial vehicle makes (> 3.5 t) sold in Romania (2000-2005)

### 4 Import / Export Information for refrigeration units for vehicles

### 5 Transportation of Goods

- Evolution of distance covered by goods transported by various transportation modes in Romania, overall (1998 – 2005) and broken down by origin and destination type (within Romania / internationally / in transit) (2003 – 2005)
- Evolution of the quantity of goods transported by various transportation modes in Romania, broken down by origin and destination type (within Romania / internationally / in transit) (2003 – 2005)

### 6 Demand Side Analysis

- Overview
- Frozen and chilled goods market / distributors of frozen and chilled products goods
- Freight transporters
- Retail market, fast food market and HORECA

### 7 Supply Side Analysis

- Overview
- Profiles of: main distributors of refrigeration units, main body-builders for temperature controlled transportation, main international brands of refrigerated units present in Romania and main manufacturers of trailers and semi-trailers sold on the Romanian market

### 8 Legal Framework

### 9 Operational Aspects Related to the Market for Temperature Controlled Transportation

### 10 Main drivers of the market for temperature controlled transportation in Romania

### 11 SWOT analysis of the market for temperature controlled transportation

### 12 Forecasted evolution of the Romanian market for refrigeration units

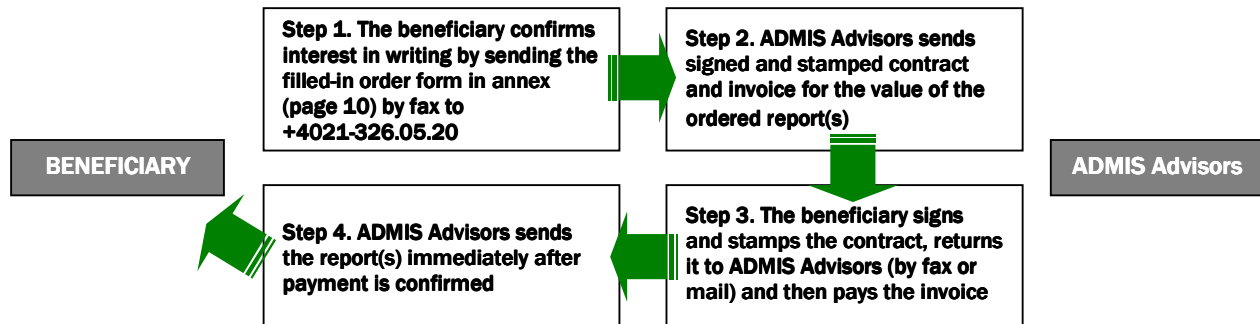
### 13 Key research findings and conclusions

**Price** (VAT excluded)

**EUR 640**

## Payment terms and delivery. Discounts

- Ordering and delivery:



- For beneficiaries located in Romania, invoicing will be made in RON, at the official exchange rate stated by the National Bank of Romania on the invoicing day.
- For beneficiaries located abroad, invoicing will be made in EUR and the banking transfer taxes will be paid by the beneficiary.
- Reports can be delivered:
  - by e-mail
  - by courier (hard copy and electronic copy on CD); in this case, the delivery will be subject to shipping charges (beneficiary will pay courier's fee at destination)
- Firm orders (contract signed by the beneficiary) submitted by May 15<sup>th</sup> benefit from the following discounts:

Report Packs	Reports included	Normal price (VAT excluded*)	Discounted price (VAT excluded*)	Discount rate (%)
"Vehicle A/C machines" Pack	Report 1 + Report 2	EUR 1,030	<b>EUR 825</b>	<b>20%</b>
"Minibuses" Pack	Report 3 + Report 4	EUR 930	<b>EUR 745</b>	<b>20%</b>
"All Reports" Pack	All 5 reports presented in this document	EUR 2,600	<b>EUR 1,560</b>	<b>40%</b>
Any combination of 2 reports (except for the combinations above)				<b>15%</b>

\* VAT will not apply if the client is registered outside EU or, if registered inside EU, can prove that is registered VAT payer and provides a valid VAT code

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**ANNEX  
ORDER FORM – MULTICLIENT STUDIES**



**ORDER FORM**

Complete this order form and send it by fax to **0040 021 326 05 20**

For details please call us at **0040 021 322 85 96** or e-mail as at **contact@admisadvisors.ro**

**ORDER INFORMATION**

Please tick the reports you want to purchase and the type of delivery

**Reports**

▪ **Delivery by e-mail**

▪ **Delivery by courier\***

**Report 1 - Vehicle air conditioning systems and parts market overview – Sector Study**

**Report 2 - Usage and purchasing patterns, customer's perception and decision making criteria used on the market for vehicle air conditioning systems and parts – Quantitative Survey**

**Report 3 - Minibuses market overview – Sector Study**

**Report 4 - Usage and purchasing patterns, customer's perception and decision making criteria used on the market for minibuses - Quantitative Survey**

**Report 5 - Temperature controlled transportation market overview – Sector Study**

*\*Courier's taxes will be paid at destination*

**CONTACT INFORMATION**

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Address: \_\_\_\_\_

Company: \_\_\_\_\_

Job Title: \_\_\_\_\_

Country: \_\_\_\_\_

Email: \_\_\_\_\_

City: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**INVOICING INFORMATION**

Company name: \_\_\_\_\_

Register of Commerce Number: \_\_\_\_\_

Fiscal office located in:

Fiscal Identification Code: \_\_\_\_\_

Country \_\_\_\_\_, City \_\_\_\_\_,

With Bank Account \_\_\_\_\_,

Address \_\_\_\_\_

held at \_\_\_\_\_



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**THANK YOU  
FOR YOUR TIME!**

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*ADMIS Advisors is a full service market research agency with a team of highly experienced professionals who have previously researched a broad spectrum of markets in Romania. The key benefits of working with ADMIS Advisors are the highly flexible, over-delivery and dedicated approach and the high quality services provided at reasonable tariffs.*

*For more details on our capabilities and experience, please visit our website at: [www.admisadvisors.ro](http://www.admisadvisors.ro)*