

Industry Studies Current Publications

2012



BIS Shrapnel's wide range of reports draws on the company's two core competencies:

Market Research • Forecasting

Industry Studies

Current Publications 2012

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.

www.bis.com.au



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 free of charge attendances to our twice-yearly Business Forecasting Conferences on the economy plus a subscriber enquiry service. Monthly.

Long Term Forecasts, 2012 – 2027

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 free of charge attendances to our twice-yearly Business Forecasting Conferences on the building and property markets plus a subscriber enquiry service. Monthly.

Building in Australia, 2012 – 2027

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, 2011 – 2012

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, 2012

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, 2011/12 – 2017

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, 2011/12 – 2017

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, 2012 – 2015

Provides annual median house price forecasts to June 2015 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, 2012 – 2019

- > 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.

Medium and High Density Dwelling in Sydney Suburbs, 2012 – 2017

Provides an analysis of the drivers of demand for the medium and high density dwelling market across Metropolitan Sydney centres. Details and forecasts are provided for new dwelling activity, rents, prices, and yields across each of Sydney's 14 Statistical Subdivisions.

Residential Land Market Outlook for Demand and Supply, 2012 – 2017

Analyses the 5 year outlook for broadhectare land, housing demand, dwelling commencements, and lot production trends. Available for 7 major metro areas. A 6 month update is also provided.



COMMERCIAL PROPERTY

Commercial Property Prospects, 2012 – 2022

- > 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, 2012 – 2022

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, with a 6 monthly update plus quarterly newsletters.

Bulky Goods Retailing, 2011 – 2016

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, 2012 – 2022

- > 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.

Australia's Hotel Market Property Prospects: Sydney, Melbourne, Brisbane and Perth, 2012 – 2021

Our comprehensive study on the eastern seaboard hotel sector assesses the outlook for hotel demand, supply, room rates and investment returns. This year's report introduces analysis and forecasts for the booming Perth market. 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, 2011/12 – 2026

Examines underlying influences on the engineering construction cycle, with detailed forecasts for 12 sub-sectors of construction by state. Annual, with 6 month update of all forecasts.

Mining and Heavy Industry Construction Supplement, 2011/12 – 2026

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

Road Construction in Australia, 2011 – 2026

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

Road Maintenance in Australia, 2011 – 2026

This is the only source of detailed historical data, forecasts and analysis for Australia's \$6 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 activity and input prices, with a 5 year annual forecast of the road and bridge construction cost index.

Maintenance in Australia, 2012 – 2027

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, 2011 – 2026

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

Forecasts of sawn timber production, consumption, prices and trade for Australia and each state. Structured interviews with over 400 timber merchants, distributors, builders, and furniture manufacturers. Includes a global overview, industry overview and current issues facing the industry. Biennial with 15-year forecasts.

Plywood and Oriented Strand Board in the Pacific Rim and Europe

The report combines market research and forecasts to provide a strategic analysis of the prospects for plywood and OSB with regional analysis for North and South America, North and South Asia, Europe, Australasia and Africa. Biennial with five year forecasts for production, consumption, trade and prices.

Medium Density Fibreboard in the Pacific Rim and Europe

Combines market research and forecasts to project MDF production, consumption, trade and prices for North and South America, North and South Asia, Australasia and Europe. Biennial with 5 year forecasts.

Particleboard in the Pacific Rim and Europe

Combines market research and forecasts to project particleboard production, consumption, trade and prices in North and South America, North and South Asia, Australasia and Europe. Biennial with 5 year forecasts.

Structural Engineered Wood Products in the Pacific Rim and Europe

Combines market research and forecasts to project LVL, LSL, glulam and I-beam production, consumption, prices and trade in North and South America, North and South Asia, Australasia and Europe. Biennial with 5 year forecasts.



HOUSEHOLD APPLIANCES AND POWER TOOLS

The Household Appliances Market in Australia, 2012

Biennial survey of 5,000 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. ▶▶

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

Appliances Installed in New Dwellings, 2011 – 2012

The report covers the following appliances installed in new dwellings by residential builders:

- › Kitchen appliances
- › Hot water systems
- › Climate Control systems

We focus on the types of each appliance installed, drivers, brands and the overall decision – making process.

The Barbecues Market in Australia, 2011

This study of 5,000 Australian consumers contains a market overview (including market size data), brand analysis, demographic and retailer data for the domestic barbecues market in Australia.

The Power Tools Market in Australia, 2011

A comprehensive study of 5,000 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.

PAPER AND PACKAGING

Paper and Board Packaging in Australia, 2011 – 2012

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

Foodservice trends, developments and insights, 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 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.

New Zealand 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, sales and 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.

Coffee & Beverages in Australia

The six individual reports in this series tracks Australian's changing consumption patterns and preferences for coffee and other non alcoholic hot and cold beverages in the three markets listed; future trends and developments and growth prospects:

- › At Work
- › At Home
- › Away from Home

Route Trade in Australia

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

Fast Food in Australia

The report addresses Australian's total fast food consumption, consumer profiles and preferences, trend and developments in the this market, eating habits, chain ratings and growth prospects for fast food in Australia.

Foodservice Omnibus Australia

An instrument for private studies in Australia.

Foodservice Challenges

Issue based series of reports.

Australian Foodservice Equipment

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

Middle East Foodservice

Individual reports address market characteristics, key market drivers, foodservice market trends and outlook

- › United Arab Emirates
- › Kingdom of Saudi Arabia
- › The Gulf States – Bahrain, Kuwait, Oman & Qatar

Foodservice in South East Asia

Six individual reports, on key trends and developments, market drivers, prospects, size, and brand analysis in Malaysia, Singapore, Thailand, Vietnam, Philippines, Indonesia with regional overview.

Foodservice in China

Market structure and characteristics, market drivers, trends and developments, outlook and online market size database.

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