

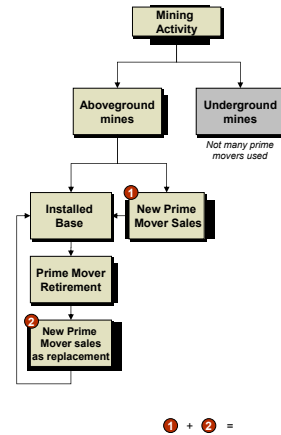
INDUSTRY ANALYSIS

Industry Analysis of 20+ commodities and services across the globe

ABOUT THE OFFERING

- Detailed analysis around market sizing, key regulations, competition and market forces
- Capability to conduct end research to support key hypothesis
- Service offerings can be used for
 - Growth Strategy
 - Product Portfolio strategy
 - Proposal writings
 - Policy Advisory

MARKET ASSESSMENT FRAMEWORK



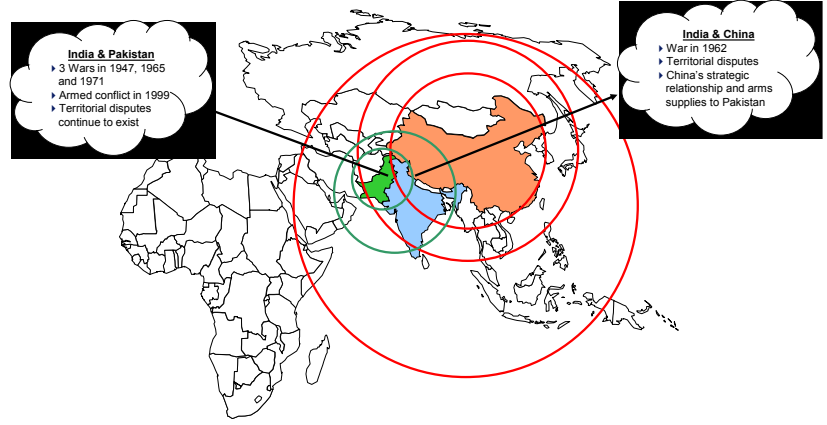
Key Assumptions

Coal mining			Iron ore mining																																										
Mining output expected to grow at 5% pa and 10% pa from 2005 in India and China			Mining output constant in 2006 and																																										
Mix of aboveground mines is unchanged period of 2005 – 2015																																													
Waste to Ore ratio is																																													
Production % by mine																																													
%	Over ground		%	Over ground																																									
China	9%		China	81%																																									
India	81%		India	3%																																									
Percentage of mines																																													
%	Over ground		%	Over ground																																									
China	3%		China	36%																																									
India	36%		India	3%																																									
Life of excavators, loaders, dozers and dumpers is 14 years at average utilization																																													
Average production (in MMtpa), prime mover price and percentage of mines using the prime mover are the following																																													
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Average output from new equipment is 25% higher than the average output from existing equipment																																													

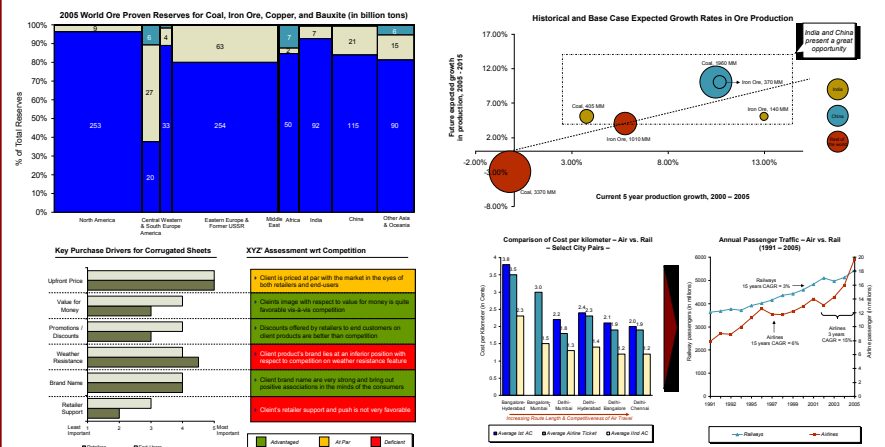
Key Branches of market

- Top-down and bottom up evaluation
- Listing of assumptions and key findings

ASSESSING THE GLOBAL IMPACT



DETAILED ANALYSIS ON KEY ATTRIBUTES



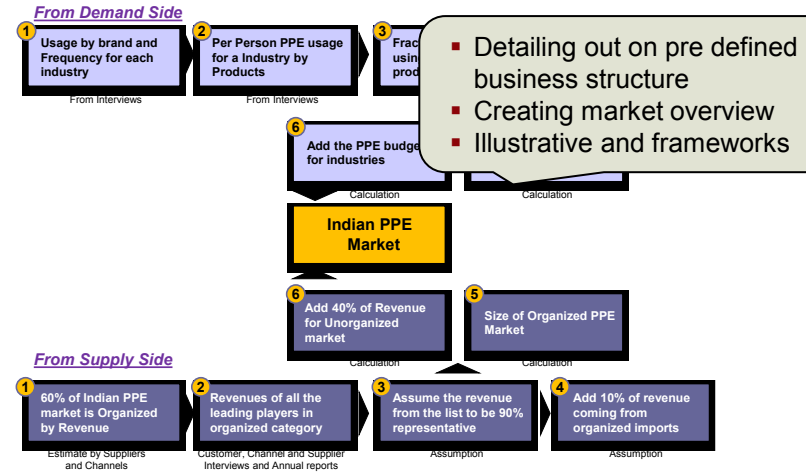
MARKET AND OPPORTUNITY SIZING

Market sizing for various products and services across the globe

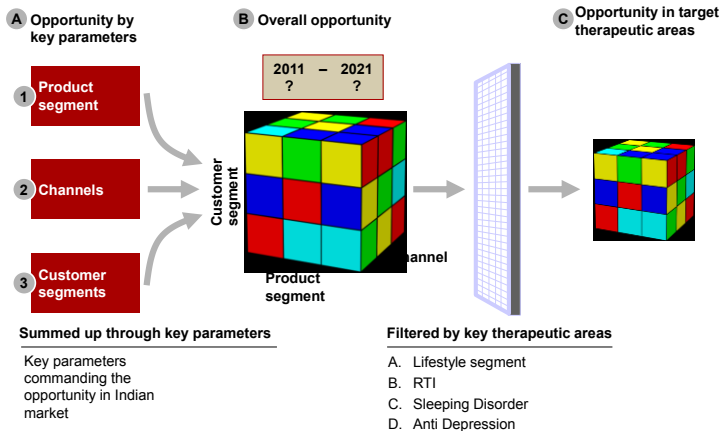
ABOUT THE OFFERING

- Market and opportunity analysis
 - Survey based methodology followed by robust frameworks
 - Methodology vetted with consultants
 - Iterative and feedback based approach
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- Service offerings can be used for
 - Growth Strategy
 - Opportunity analysis
 - Policy documents

TOP-DOWN AND BOTTOM-UP ANALYSIS FRAMEWORK



OPPORTUNITY ANALYSIS



MARKET SEGMENTATION BY KEY VARIABLES

