



UNIVERSITY
OF APPLIED SCIENCES
UPPER AUSTRIA

FIREFIGHTING MARKET RESEARCH OF CIS-REGION

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STUDY PROGRAM

GLOBAL SALES AND MARKETING

AGENDA

- **GENERAL INFORMATION & FIRE FIGHTING MARKET**
- **ROSENBAUER COMPETITION ANALYSIS**
- **RELATED SWOT-ANALYSIS**
- **MARKET RECOMMENDATION & POTENTIAL RANKING**



KAZAKHSTAN



COUNTRY DATA

KAZAKHSTAN

- **CAPITAL:** ASTANA
- **POPULATION:** 17.8 MILLION
- **SIZE:** 2.725.000 KM² (9TH)
- **GDP PER CAPITA:** 7.510,08 USD

AUSTRIA

- **CAPITAL:** VIENNA
- **POPULATION:** 8.75 MILLION
- **SIZE:** 83.879 KM² (114TH)
- **GDP PER CAPITA:** 44.176,52 USD

MARKET ANALYSIS

- **RESPONSIBLE ORGANIZATION:** COMMITTEE FOR EMERGENCY SITUATIONS (MINISTRY)
- **BUYING STRUCTURE:** CENTRALIZED (NURSULTAN NAZARBAJEV)
- **BUDGET:** 205 102, 46 € (EACH MUNICIPALITY)
- **IMPORT:** 4.365 MILLION € (2016)
- **BIGGEST-IMPORTERS:** 1. RUSSIA - 2. USA - 3. GERMANY



MARKET DATA

KAZAKHSTAN

- **EMERGENCY TRIPS:** 48 530
- **FIRES:** 13 934
- **FIRE STATIONS:** 421
- **FIRE FIGHTERS:** 15 431

AUSTRIA

- **EMERGENCY TRIPS:** 217 330
- **FIRES:** 45 349
- **FIRE STATIONS:** 4 820
- **FIRE FIGHTERS:** 341 619

Source: Committee for Emergency Situations - Statistics

COMPETITION ANALYSIS

KAMAZ TRUCKS



Price: 89 641 €

URAL TRUCKS



Price: 54 320 €

SWOT ANALYSIS

STRENGTHS:

- QUALITY “MADE IN AUSTRIA”
- EXPORT KNOWLEDGE
- EXPERIENCE AND KNOW-HOW
- VARIETY OF PRODUCTS
- FAMILY OWNED BUSINESS → CREDIBILITY!

SWOT ANALYSIS

WEAKNESSES:

- LOW PRICE LEVEL
- NO ESTABLISHED GOVERNMENT RELATIONS
- POST-SOVIET BUREAUCRACY → CORRUPTION!
- FLEXIBILITY AND RESPONSIVENESS
- CULTURAL DIFFERENCES AND INTERFERENCES

SWOT ANALYSIS

OPPORTUNITIES:

- FOREIGN INVESTORS ARE WELCOMED
- INVESTMENT POTENTIAL FOR TRUCKS
- MARKET GAP FOR EQUIPMENT PARTS
- POTENTIAL RENEWAL OF MARKET
- WELL-ESTABLISHED DIPLOMATIC RELATIONS

SWOT ANALYSIS

THREATS:

- DOMESTIC BRANDS SUPPORTED
- NAZARBAJEV'S DEATH
- FALL OF KAZAKH TENGE
- POLITICAL CONFLICTS
- LOW PURCHASE POWER

MARKET STRATEGY & POTENTIAL RANKING

- FOCUS ON TRUCK EQUIPMENT → SCORE WITH QUALITY
- OBSERVATION AND FORECAST OF POLITICAL SITUATION
- POTENTIAL MARKET FOR INVESTMENTS
- MARKET POTENTIAL RANKING: 3RD/4



Source: Astana Times

UKRAINE



COUNTRY DATA

UKRAINE

- **CAPITAL:** KYIV
- **POPULATION:** 45 MILLION
- **SIZE:** 603 628 KM²
- **GDP PER CAPITA:** 8.300 USD

AUSTRIA

- **CAPITAL:** VIENNA
- **POPULATION:** 8.75 MILLION
- **SIZE:** 83.879 KM² (114TH)
- **GDP PER CAPITA:** 44.176,52 USD

Source: CIA World Fact-Book

MARKET ANALYSIS

- **RESPONSIBLE ORGANIZATION:** THE STATE EMERGENCY SERVICE OF UKRAINE (SESU)
- **BUYING STRUCTURE:** CENTRALIZED
- **MINISTER:** CHECHOTKIN MYKOLA OLEKSANDROVICH
- **BUDGET:** 600.8 MILLION UAH = 17.5 MILLION EUR (2017)



Source: State Emergency Service of Ukraine

MARKET DATA

UKRAINE

- **EMERGENCY TRIPS:** 157 PER DAY
- **FIRES:** 78 993
- **FIRE STATIONS:** 894
- **FIRE FIGHTERS:** -

AUSTRIA

- **EMERGENCY TRIPS:** 217 330
- **FIRES:** 45 349
- **FIRE STATIONS:** 4 820
- **FIRE FIGHTERS:** 341 619

Source: Review of Fire Statistics Data - Ukraine

COMPETITION ANALYSIS

**Fire extinguishers up to
3 tons:**

ATS-40 Tanker,
model 63B, ZIL chassis



**Fire extinguishers of up
to 8 tons:**

ATS-20 (53211)
model 240.02



**Fire extinguishers up to 5
tons:**

ATS-4o (5336) -245



Road train fire truck:

Model
AC-30-80-2 (6443) -406



ТОВ «ПК «ПОЖМАШИНА»

SWOT-ANALYSIS

STRENGTHS:

- QUALITY “MADE IN AUSTRIA”
- YEARS OF EXPERIENCE
- ROSENBAUER’S REPUTATION
- THE CUSTOMIZATION OF PRODUCTS

SWOT-ANALYSIS

WEAKNESSES:

- MUCH MORE EXPENSIVE PRODUCTS
- NO CIS MARKET HAS BEEN PENETRATED YET
- NO ESTABLISHED GOVERNMENT RELATIONS
- GOVERNMENT - CONTROLLED FIREFIGHTING ORGANIZATION
- CULTURAL DIFFERENCES AND INTERFERENCES

SWOT-ANALYSIS

OPPORTUNITIES:

- ASSOCIATION AGREEMENT
- LARGE UPGRADE IN QUALITY IS IMMINENT
- DEMAND FOR RELATIVELY MORE EXPENSIVE WESTERN SAFETY AND SECURITY EQUIPMENT
- FOUR MILLION EUR INCREASE COMPARED TO THE YEAR OR 2016
- UKRAINIAN-AUSTRIAN ASSOCIATION BEING ESTABLISHED

SWOT-ANALYSIS

THREATS:

- POLITICAL AND ECONOMIC INSTABILITY
- CORRUPTION PERCEPTIONS INDEX (29TH OUT OF 100)
- LACK OF ECONOMIC FREEDOM
- MILITARY SITUATION IN THE EAST
- OUTDATED ORGANISATIONAL STRUCTURES

MARKET STRATEGY & POTENTIAL RANKING

- MAIN FOCUS SHOULD LAY ON SUPPLYING TO A SPECIFIC REGION OR INDUSTRY
(AVERAGE PRICE PER VEHICLE THE GOVERNMENT IS READY TO PAY IS 107541.47 EUR)
- FOCUS ON SPECIALIZED EQUIPMENT (AIRPORTS)
- ONE REAL COMPETITOR “POSHMACHINA”
- MARKET POTENTIAL RANKING: 4TH/4



MARKET POTENTIAL RANKING

1. AZERBAIJAN



2. RUSSIA



3. KAZAKHSTAN



4. UKRAINE

