



Guide to full market analysis

Methodological notes supporting the PDCA toolbox – Full Market Analysis

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Introduction

This document describes the methodology used to conduct the Full Market Analysis in the BIN2BEAN project. The full market analysis is the evolution of the Preliminary Market Analysis: it takes the broad market context established in the preliminary phase and deepens it into the detailed, site-specific evidence base required to build the business models and business plans for the solutions retained at city level.

It is intended for cities or organisations wishing to replicate this activity as part of the BIN2BEAN PDCA replication approach. This note sets out how the preliminary analysis was extended, the additional data that were collected, and the way these feed into the business plans, so that other municipalities and consortia can reproduce and adapt the method to their own context.

Scope

Whereas the preliminary market analysis establishes a general understanding of the market context – the size and growth of the soil-improvers market, the macro-environment (PESTEL) and a first qualitative screening of the candidate solutions (SWOT) – the full market analysis narrows this context down to the operational and demand-side parameters needed to build a viable business model for each solution. It covers three additional dimensions:

- the demand and the area to be served – the number of citizens and households, the type of housing, and the population density of the target area;
- the bio-waste supply potential – the volume of separately collected bio-waste that the area can realistically generate and capture;
- the comparison between door-to-door (kerbside) collection and bring-point (communal-container) models.

The full market analysis builds on the preliminary analysis, adding the site-specific data required to translate the market context into a concrete business initiative. The individual, city-specific analyses produced for the Living Labs are presented in the corresponding project deliverables.

Methodology

Building on the preliminary analysis, the full market analysis pairs a more intensive, locally sourced data-collection effort with an analytical framework that adds three quantitative modules to the tools already applied. The data sources and the framework are described in turn below.

Data collection

Whereas the preliminary analysis relied mainly on desk research, the full market analysis draws more heavily on primary and local data provided by the Living Lab partners. The main sources are: municipal population and housing registers (number of inhabitants, number and type of dwellings, density); existing bio-waste

collection data (collection model, frequency, participating households and captured tonnage); per-capita bio-waste generation figures from municipal or national statistics; and the cost data associated with each collection model.

Where primary data were missing, confidential, or not yet available for a given area, European benchmarks and figures from comparable municipalities were used as proxies and flagged as such.

Analytical framework

The full market analysis carries forward the evidences produced by the preliminary analysis and complements them with additional information providing the demand- and supply-side evidence needed for business planning.

- The area served by each solution is described in quantitative terms: the number of citizens and households, the type of housing (single-family houses, low-rise buildings, high-rise apartment blocks) and the population density. Housing typology is decisive, because it determines which collection models are feasible and how much storage is available at the point of generation.
- The bio-waste that the area can realistically supply is estimated from the population and the average per-capita generation. This module turns the area characterisation into the tonnage figures that drive both the revenue side and the sizing of the treatment solution.
- The candidate collection models are systematically compared for each local context. Door-to-door (kerbside) collection offers the citizen the highest convenience but entails higher operational costs (more vehicles, routes and labour); bring-point or communal-container models ask the citizen to carry the bio-waste to a shared point, so convenience is lower and distance-dependent, but operational costs are lower. Because convenience directly influences participation, and therefore the capture rate, the choice of collection model links citizen behaviour to the economics of the initiative.

Together, these three modules feed directly into the Business Model Canvas and the business plan: the demand and the captured volumes inform the value proposition and the revenue streams; the collection model inform the key activities, key resources and cost structure; and the housing and density profile informs the customer segments and channels.

Key limitations

The main limitation concerns local data availability: population, housing and collection data are not always available at the level of detail required, and some cost data are commercially or institutionally sensitive; where this was the case, benchmarks and proxies were used, which reduces the precision of the estimates.