

Client overview

A manufacturer of high performance lubricants, greases and oils was working with SAL to evaluate new market opportunities to underpin their future growth strategy. A previous project, concluding with a 1 day interactive workshop, highlighted a potential opportunity for biodegradable gear oils in the wind industry. To better understand the scale and nature of the opportunity, the client requested a Voice of Customer (VoC) study. The aim was to explore the technical and commercial requirements for gear oils in wind turbines and the level of interest in biodegradable alternatives to widely used polyalphaolefin lubricants, and to identify trends (technical, environmental, regulatory etc.) which might positively or negatively impact the gear oil market over the next 5–10 years.



The search

SAL initiated a VoC study to evaluate the market opportunity for a bio-degradable gear oil in the wind industry. SAL identified and engaged with approximately 20 relevant experts and Key Opinion Leaders (KOLs) from different types of organisation across the wind industry including turbine OEMs, gearbox manufacturers, service providers, and power

operators. Commentators selected by SAL for interview typically had a thorough understanding of wind turbine operation and maintenance, and/or were from sustainability functions and could discuss the industry's appetite for more environmentally friendly lubricants. Where appropriate, secondary research was conducted to validate findings from primary research, and to generate additional data in order to develop a more comprehensive view of the needs and dynamics of the wind energy market. Findings were analysed and compiled into a report which was delivered to the client upon completion of the project.

“we really like these more bespoke studies by SAL, the nuances and granularity is really important”

“the team did an excellent job, and the findings have prompted a number of internal conversations”

Outcome

The insights generated by the study enabled SAL to provide the client with an **overview of trends** influencing the gear oil market, a summary of **market opportunities and threats**, a **customer segmentation analysis**, and a **route to market roadmap**. SAL could also **make connections** to several organisations interested in further discussions with our client about their product. The findings are being used to inform and develop the clients **market access strategy** for wind.