

MARKET SURVEY FEEDBACKS

In consideration of the pilot start phase, the Project team elaborated questionnaires to be distributed among the industrial stakeholders, academia, suppliers and end-users with the objective of collecting information on the market needs and forecasts and finally evaluate the market uptake of the sustainable TRIALKYL TMPi product in preparation of the After-LIFE communication plan.

During the market surveys, the stakeholders were grouped in categories, i.e. chemical industry, policy makers, end-users, materials science, and engineering scientists, specialized scientists on VOCs, toxic chemicals and health effects. The market surveys allowed Italmatch Chemicals to estimate the return of investment of the TRIALKYL TMPi and to possibly define future research paths in terms of reaction performance, potential substitution of raw materials and sustainability.

The output will be used by Italmatch Chemicals Finance Manager, together with the technical staff, also to assess the replication potential of the novel technology and elaborate market forecasts. In addition to this, the project partners could evaluate the impact of the TRIALKYL TMPi on their market of action and its diffusion both in the EU markets and globally.

A smart electronic survey format was adopted based on different criteria such as price evaluation, tool's flexibility, fitting with the scope, easiness in the usage, adaptability to both paper and electronic divulgation, easily exchanged among the partners. The tool, provided by SMART SURVEY ENTERPRISE, (<https://www.smartsurvey.co.uk>), met the LIFE-TRIALKYL needs, as it allows a customized adaptation to the different contexts we needed to explore, starting from a basic concept that we could adapt to our needs without any expense and can constitutes itself a valid communication vehicle.

The survey, whose indicative snapshot is reported below, was divulgated during LIFE-Trialkyl dissemination and communication events, providing useful feedback to define the after LIFE Communication plan.



Fig.1 The electronic survey-snapshot

- Looking at the market segments (Fig.2) which the interviewed panel belong to, it was clear that Chemical synthesis, PVC and Plastic additives ones were the major interested. Therefore, having to define deadlines and priorities the following pathway was set:
 - a. Specialty chemicals – Plastic additives : short term communication actions
 - b. PVC- packaging: medium term communication actions
 - c. CROP protection and P-products: long term communication actions
 The highlighted deadlines for coverage of the relevant market segments were because approaching PVC Packaging and CROP protection-P products would require a higher effort and a different approach in terms of communication tools and divulgation channels

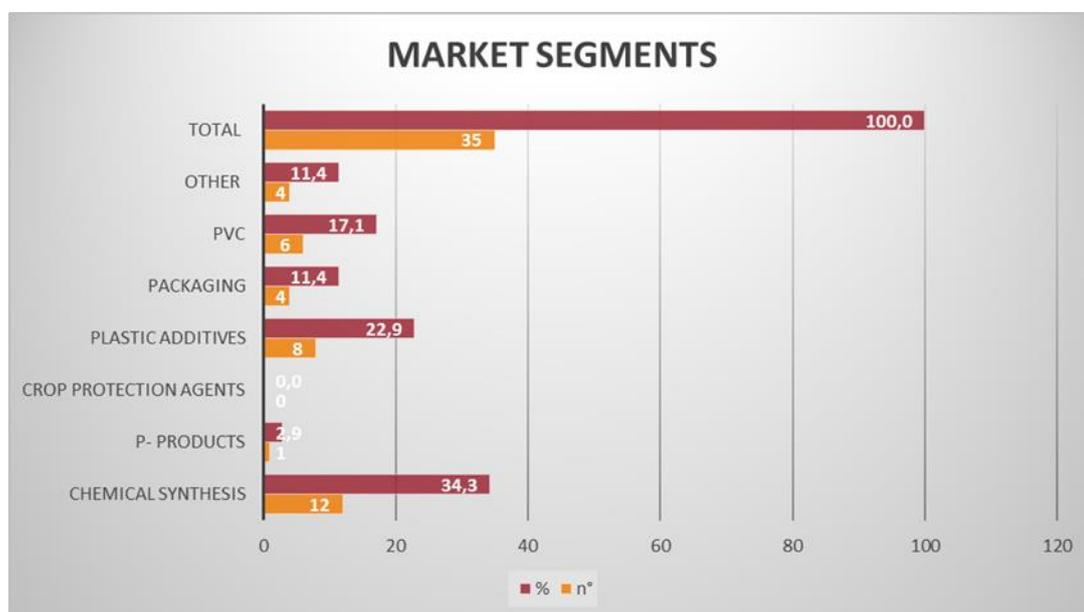


Fig.2. distribution of LIFE TRIALKYL TMPi market segments –survey feedbacks

SHORT TERM	MEDIUM TERM	LONG TERM
Specialty chemicals	PVC	Crop protection
Chemical synthesis	Packaging	P- products (lubricants)
Plastic additives		Pharmaceuticals

- Looking at the “level of interest in testing” (Fig.3) expressed by the interviewed panel it was evident that the testing interest was highly specific down to standard, while the “low” interest got a very poor rate. This feedback could be indirectly linked to the high level of specialization of the potential users, which obliged us to think about
- a range of
 - high level communication tools
 - rich in technical content
 - specifically addressed
 - b. selective divulgation channels
 - c. selective speakers

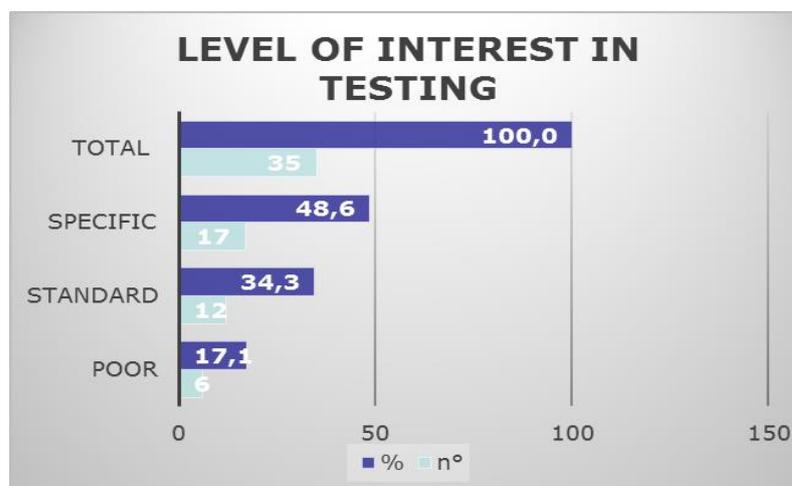


Fig.3. level of interest in testing LIFE TRIALKYL TMPi -survey feedbacks

- Looking at the reasons for the expressed interest by the interviewed potential stakeholders and opinion leaders (Fig.4) it was shown a strong sensitivity toward the environmental issues and benefits deriving from the adoption of the novel LIFE-Trialkyl process. It was interesting that the social impact come second to the environmental issue, followed by the economic impact that was not considered as important as the other two ones. This suggested to enlarge the audience of the after LIFE Communication strategy to those fields of actions which cover:
- the reduction of the environmental impact
 - the improvement of the circular economy concept
 - the innovation in Chemistry as a leverage to increase the European citizens welfare

d. the sustainability evaluation of any process involved upstream and downstream to the LIFE-Trialkyl.

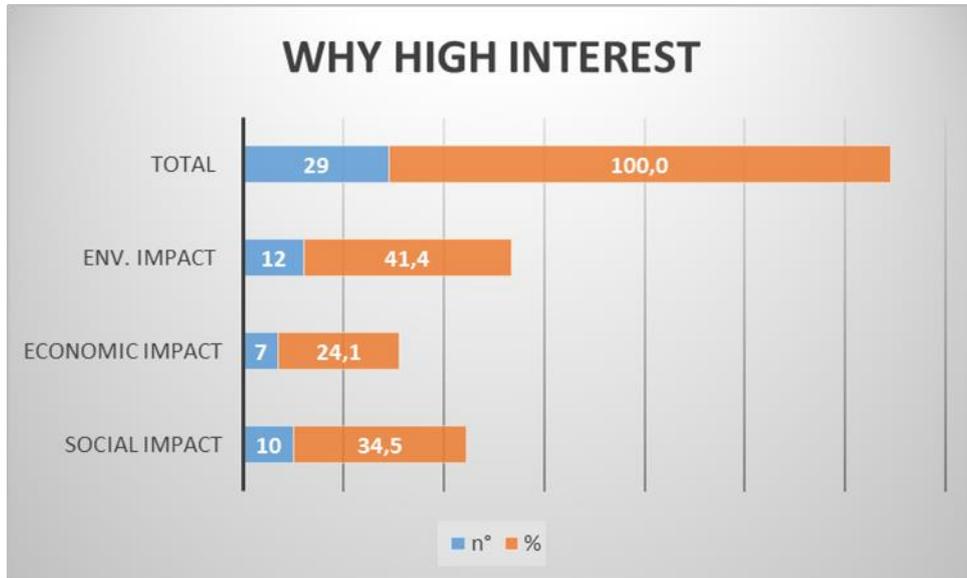


Fig.4. reasons for the level of interest in testing LIFE TRIALKYL TMPi -survey feedbacks