

Comparative Study of Strategic Marketing Approach of Formwork Companies in Indian Residential Construction

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ABSTRACT

The Indian residential construction sector has witnessed exponential growth over the past two decades, driven by rapid urbanisation, government-backed housing programmes such as Pradhan Mantri Awas Yojana (PMAY), and rising middle-class housing demand. Within this context, the formwork industry — a critical sub-sector supplying temporary moulding systems for concrete structures — has emerged as a strategically contested marketplace. This paper presents a comparative analysis of the strategic marketing approaches adopted by three leading multinational formwork companies operating in India: MEVA Formwork India Pvt. Ltd., Peri India Pvt. Ltd., and Doka India Formwork Pvt. Ltd. Employing a secondary data-based research methodology, data were gathered from company websites, annual reports, industry publications, trade press, case studies, and sector reports published between 2015 and 2024. The study analyses each company's marketing mix (4Ps), brand positioning, target customer segmentation, competitive differentiation, and digital marketing strategies. Four structured comparison tables are presented to synthesise findings across dimensions of company profile, marketing mix, strategic positioning, and SWOT analysis. Findings reveal that while all three companies are of European origin and compete in overlapping market segments, they employ distinctly differentiated marketing strategies. PERI India demonstrates the broadest strategic coverage with a service-led total-solution approach, Doka India anchors its positioning in technology leadership and brand prestige, and MEVA India focuses on value-for-money engineering targeting mid-tier contractors. The paper concludes with implications for domestic and international formwork companies seeking to strengthen their competitive position in India's high-growth residential construction market.

Keywords: *Formwork, Strategic Marketing, Indian Construction Industry, Competitive Analysis, 4Ps, Brand Positioning, MEVA, PERI, Doka, Residential Construction, Secondary Research*

1. INTRODUCTION

India's construction industry is one of the largest contributors to the national GDP, accounting for approximately 9% of economic output and employing over 71 million workers as of 2023 (KPMG, 2023). The residential construction segment alone has been the primary driver of growth, with the Government of India's PMAY scheme targeting the construction of 20 million urban and 29.5 million rural homes by 2024 (MoHUA, 2023). This scale of construction activity has dramatically elevated the strategic importance of construction sub-sectors, with the formwork industry emerging as a high-value niche with growing competitive intensity.

Formwork systems — temporary or permanent moulds used to shape poured concrete into structural elements — constitute approximately 20-25% of the total concrete construction cost in any residential project (Chandgude & Pore, 2019). The choice of formwork technology directly impacts project timelines, labour costs, surface finish quality, and structural integrity. As Indian developers and contractors increasingly adopt high-rise construction, fast-track building techniques, and quality-conscious delivery models, the demand for advanced engineered formwork systems has surged.

Historically dominated by conventional timber and bamboo-based formwork, the Indian market has rapidly transitioned towards modern system formwork — including aluminium panel systems, modular steel-framed systems, and climbing formwork. This transition has opened enormous market opportunities for global formwork specialists. Multinational companies from Germany, Austria, Finland, and other construction-advanced nations have established strong footholds in India, leveraging their technological sophistication, extensive product catalogues, and internationally validated engineering capabilities.

Among the prominent international players, three companies stand out for their sustained presence, market penetration, and strategic visibility in the Indian residential construction market: MEVA Formwork India Pvt. Ltd. (subsidiary of MEVA Schalungs-Systeme GmbH, Germany), Peri India Pvt. Ltd. (subsidiary of PERI GmbH, Germany), and Doka India Formwork Pvt. Ltd. (subsidiary of Doka GmbH, Austria). Each of these organisations brings a distinct corporate heritage, product philosophy, and go-to-market strategy, making them ideal subjects for a comparative marketing analysis.

Despite the significance of the formwork sector in Indian construction, academic literature on marketing strategies specific to formwork companies in India remains sparse. Most existing studies focus on technical performance metrics, construction management efficiency, or macro-level industry overviews. There is a notable gap in understanding how formwork companies deploy strategic marketing tools — positioning, pricing, promotion, distribution, and brand building — within the unique context of the Indian construction market.

This paper aims to address this gap by presenting a structured, secondary data-based comparative study of the marketing strategies of MEVA, PERI, and Doka in India. The study is organised around the following research objectives: (1) to profile the Indian operations of each company; (2) to analyse their marketing mix strategies; (3) to compare their strategic positioning and competitive advantages; and (4) to conduct a SWOT-based synthesis that identifies strategic insights and future directions.

The remainder of the paper is structured as follows: Section 2 reviews relevant literature on B2B marketing in construction and formwork industry dynamics; Section 3 details the research methodology; Section 4 presents results through four comparative tables with discussion; Section 5 concludes with strategic implications and recommendations.

2. LITERATURE REVIEW

2.1 B2B Marketing in the Construction Industry

Business-to-business (B2B) marketing in the construction industry operates under distinctly different conditions compared to consumer markets. Customers are typically institutional — developers, contractors, government bodies — and purchasing decisions are often influenced by technical specifications, long-term cost calculations, supplier reliability, and relationship quality (Kotler & Pfoertsch, 2006). Research by Blythe and Zimmerman (2005) emphasised that in industrial markets, personal selling and technical demonstrations outweigh mass-market advertising as promotional tools. This observation aligns well with the formwork sector, where site demonstrations, engineer-to-engineer consultations, and project-specific proposals form the backbone of the sales process.

Rouven and Lasch (2011) argued that in specialised B2B construction markets, the marketing mix must be adapted to long buying cycles, complex procurement procedures, and the central role of after-sales service. Their study of European construction equipment companies revealed that companies offering integrated service ecosystems — encompassing training, technical consulting, and logistics — achieved significantly higher customer retention than product-only sellers. This resonates strongly with the strategies observed among the companies studied in this paper.

2.2 The Indian Formwork Market

The Indian formwork market was valued at approximately USD 1.4 billion in 2022 and is projected to grow at a CAGR of 7.8% through 2028, driven by government infrastructure spending, urbanisation, and the residential housing boom (MarketsandMarkets, 2023). The sector is characterised by a dual structure: a large informal segment dominated by conventional timber/bamboo formwork used by small contractors, and a growing formal segment featuring engineered system formwork used by organised developers and large construction firms.

Chandgude and Pore (2019) conducted a technical-economic comparison of conventional and modern formwork systems in India and concluded that system formwork, while carrying higher upfront costs, offered 15-30% savings in total project cost when accounting for labour, time, and material reuse across multiple pours. Ananthakrishnan and Singh (2021) examined the adoption barriers to modern formwork in Indian residential projects and identified cost sensitivity, lack of skilled labour, and absence of awareness as primary obstacles — underscoring the importance of strategic marketing in driving market conversion.

Srivastava and Kumar (2020) analysed the competitive landscape of construction material suppliers in India and identified that multinational companies competing in the Indian B2B construction space faced unique localisation challenges, including adapting to India's highly fragmented contractor base, price-sensitive procurement culture, and the dominance of relationship-based business dealings. Their study recommended a hybrid strategy combining technical excellence with relationship marketing and localised pricing frameworks.

2.3 Strategic Positioning and Competitive Differentiation

Porter's (1985) generic strategies framework — cost leadership, differentiation, and focus — provides a foundational lens for understanding how companies compete in B2B markets. In the formwork sector, companies seldom compete purely on cost; instead, differentiation through product quality, engineering support, system versatility, and brand reputation tends to drive competitive advantage (Dubois & Gadde, 2000). However, in price-sensitive emerging markets such as India, cost considerations remain paramount, particularly for the large pool of Tier-2 and Tier-3 contractors.

Kalra (2018) studied the branding strategies of foreign manufacturing firms entering India and found that companies which localised their value proposition — emphasising cost savings, ease of use, and local support — rather than simply transplanting global brand narratives achieved faster market penetration. The study further noted that trade shows, technical workshops, and industry associations were the most effective B2B promotional channels in India's construction sector.

2.4 Digital Marketing in Construction B2B

The role of digital marketing in B2B construction sectors has gained growing academic attention. Leek and Christodoulides (2011) documented how digital tools — including company websites, LinkedIn, email campaigns, and webinars — were increasingly supplementing traditional relationship-based marketing in industrial sectors. More recently, Lemon and Verhoef (2016) highlighted how B2B customer experience, including digital touchpoints, had become a central differentiator in industrial markets.

In the Indian context, the COVID-19 pandemic accelerated digital adoption across the construction industry, with virtual product demonstrations, online training programmes, and digital tender processes becoming mainstream (CII, 2021). Formwork companies that had invested in digital platforms prior to the pandemic were better positioned to maintain customer engagement and lead generation during lockdown periods, further reinforcing the strategic importance of digital marketing investment.

3. RESEARCH METHODOLOGY

3.1 Research Design

This study adopts a qualitative, secondary data-based research design structured around comparative case analysis. The comparative case study approach is appropriate for examining strategic marketing practices across organisations operating in the same industry, enabling systematic identification of similarities and differences (Yin, 2018). Secondary data methodology was chosen given the proprietary nature of marketing strategy information in the formwork industry, the absence of publicly available primary survey data for this specific sector, and the richness of secondary sources available.

3.2 Data Sources

Secondary data were collected from multiple categories of sources to ensure triangulation and reliability. Primary data sources included official company websites (meva.net/india, peri.com/india, doka.com/india), published annual reports and sustainability reports of parent companies (PERI GmbH Annual Reports 2020-2023; Doka GmbH Corporate Reports 2020-2023), and press releases and media announcements. Secondary sources comprised industry reports from MarketsandMarkets, IBEF, NASSCOM, and the Construction Industry Development Council (CIDC); trade press articles from Construction World, Construction Week India, and Indian Concrete Journal; exhibition catalogues and technical brochures from Bauma CONEXPO India 2018 and 2023; academic papers from journals including the Indian Journal of Civil Engineering and the International Journal of Construction Management; and LinkedIn company pages and digital content archives of each company.

3.3 Data Period

Data collection covered the period from 2015 to 2024, capturing a decade of market evolution that includes significant structural shifts such as the implementation of RERA (2016), the launch of PMAY (2015), the COVID-19 disruption (2020-2021), and the post-pandemic recovery and construction boom (2022-2024).

3.4 Analytical Framework

The analytical framework integrated four established strategic marketing tools: (1) the Marketing Mix (4Ps — Product, Price, Place, Promotion) as operationalised by McCarthy (1960) and later extended for B2B contexts by Blythe and Zimmerman (2005); (2) Porter's (1985) competitive positioning dimensions; (3) customer segmentation analysis drawing on Kotler's targeting framework; and (4) SWOT analysis for each company. These frameworks were applied to the secondary data to generate the four comparative tables presented in the Results section.

3.5 Company Selection Rationale

MEVA, PERI, and Doka were selected as the focus companies based on the following criteria: (a) sustained operational presence in India for at least fifteen years; (b) documented activity in the residential construction segment; (c) availability of adequate secondary data; and (d) representation of distinct strategic marketing archetypes — value, service-integration, and premium-brand — within the same market. This deliberate selection ensures maximum analytical contrast while maintaining comparability.

3.6 Limitations

This study acknowledges several limitations inherent to secondary data research. Financial data such as precise revenue figures, market share percentages, and pricing schedules are not publicly disclosed by the companies and could not be included. Additionally, secondary sources may carry publication biases, particularly company-authored materials. These limitations were mitigated by cross-referencing multiple independent sources and prioritising third-party industry reports where available.

4. RESULTS AND DISCUSSION

This section presents the findings of the comparative analysis through four structured tables, each followed by a detailed discussion. The tables collectively cover company profiles, marketing mix strategies, strategic positioning dimensions, and SWOT analyses for MEVA India, PERI India, and Doka India.

4.1 Company Profile Comparison

Table 1: *Comparative Company Profiles — MEVA, PERI, and Doka in India*

Parameter	MEVA Formwork India Pvt. Ltd.	Peri India Pvt. Ltd.	Doka India Formwork Pvt. Ltd.
Parent Country	Germany	Germany	Austria
India Entry Year	2007	2000	2008
Indian HQ	Mumbai	Mumbai	Pune
Product Portfolio	Framed formwork, climbing systems, shoring	Wall/slab formwork, scaffolding, shoring towers	Frami flex, Framax, Top 50 systems
Primary Market Segment	Infrastructure & Residential	Residential & Commercial	High-rise Residential & Infrastructure
Revenue Model	Sales + Rental	Sales + Rental + Engineering Services	Predominantly Rental + Sales
No. of Depots in India	8+	12+	10+

Table 1 reveals that all three companies are European multinationals that entered India between 2000 and 2008, at a time when the Indian construction sector was beginning its rapid modernisation phase. PERI India's early entry in 2000 has given it the longest runway for relationship-building and market penetration, reflected in its current status as the company with the most extensive depot network (12+) across India. MEVA entered in 2007, and Doka followed in 2008, both capitalising on the construction boom preceding the 2008 global financial crisis.

The revenue models of the three companies differ meaningfully. PERI operates the most comprehensive model, combining product sales, equipment rental, and dedicated engineering services — a reflection of its total-solution positioning. Doka leans primarily towards rental, which is consistent with its strategy of maintaining direct control over product condition and supporting long-term client relationships through a fleet management approach. MEVA offers both sales and rental but has historically placed greater emphasis on sales in markets where capital investment by contractors is feasible.

In terms of geographic presence, PERI's 12+ depots across India represent a significant logistics advantage, enabling faster mobilisation, lower transportation costs, and more responsive customer service. MEVA's smaller network of 8+ depots positions it as regionally stronger but with constraints on pan-India scalability. Doka's 10+ depots place it in an intermediate position with ongoing expansion, particularly in North India where large-scale residential projects have proliferated.

4.2 Marketing Mix (4Ps) Analysis

Table 2: Comparative Marketing Mix — 4Ps Analysis

4P Element	MEVA	PERI	DOKA
Product	Modular framed systems; emphasis on lightweight panels; limited customisation	Broad catalogue; custom engineering solutions; Trio/Duo wall system; SKYDECK slab system	Frami Xlife panels; wide system range; strong after-sales product support
Price	Competitive rental rates; value-based pricing for mid-segment contractors	Premium pricing; justified by engineering services and system versatility	Premium pricing with flexible rental schemes; ROI-focused pricing narrative
Place	8 depot locations; West and South India focus; limited pan-India reach	12+ depots; pan-India presence; logistics partnerships for remote sites	10+ depots; concentrated in West/South; growing North India network
Promotion	Trade shows (Bauma CONEXPO India); technical seminars; limited digital presence	Strong digital marketing; project case studies; LinkedIn; Bauma; contractor training programmes	Global brand leverage; Doka Academy; technical webinars; strong project PR

The 4Ps analysis in Table 2 reveals systematic strategic differentiation across the three companies.

Product: PERI offers the widest product catalogue in the Indian market, with dedicated systems for wall forming (Trio, Duo), slab forming (SKYDECK, MULTIFLEX), and climbing systems. This breadth allows PERI to serve as a one-stop solution for complex residential projects. Doka's strength lies in the premium quality and durability of its product line — the Frami Xlife panels, for instance, are marketed on their exceptional reuse cycles and surface finish quality, directly addressing the quality demands of high-end residential developers. MEVA's product strategy centres on modular framed systems that are deliberately designed for ease of assembly and disassembly, targeting contractors who may not have highly specialised formwork crews.

Price: Pricing strategy is a critical differentiator in the Indian market. PERI and Doka both adopt premium pricing that is justified through their comprehensive service offerings and the total cost savings they can demonstrate over a project lifecycle. MEVA occupies a value-pricing position, offering competitive rental rates designed to appeal to mid-segment contractors who are price-sensitive but willing to upgrade from conventional timber formwork. This tiered pricing landscape creates a market structure where the three companies are, to a significant degree, serving complementary customer segments rather than engaging in direct head-to-head competition.

Place: Distribution strategy in India's formwork market is largely defined by depot locations, logistics partnerships, and field engineer presence. PERI's pan-India network gives it an unmatched reach. Both PERI and Doka have invested in logistics partnerships to serve remote sites — particularly relevant in the current era of highway and rural residential construction under government schemes. MEVA's more concentrated geographic presence (primarily West and South India) is a strategic limitation, though it also reflects a focused resource allocation strategy.

Promotion: Promotional strategies highlight the sharpest divergence among the three companies. PERI India maintains the most active digital marketing presence, regularly publishing project case studies, technical articles, and contractor success stories on its website and LinkedIn. It also invests in contractor training programmes that serve a dual purpose of skill development and brand loyalty building. Doka leverages its globally recognised Doka Academy as a promotional asset, positioning its training programmes as a distinctive brand value-add rather than merely a support service. MEVA's promotional activity is more concentrated around trade exhibitions such as Bauma CONEXPO India and technical seminars, with a relatively limited digital footprint — an area of potential strategic improvement.

4.3 Strategic Positioning and Competitive Dimensions

Table 3: Comparative Strategic Positioning Indicators

Strategic Dimension	MEVA	PERI	DOKA
Brand Positioning	Value-for-money engineering	Total solution provider	Premium quality & innovation
Target Customer	Tier-2 & Tier-3 contractors	Tier-1 & large developers	Tier-1 contractors & government projects
Competitive Advantage	Cost efficiency; ease of use	Integrated engineering + product	Technology leadership; Doka Academy
Differentiation Strategy	Low total cost of ownership	System customisation & BIM integration	Product innovation & training ecosystem
Market Penetration Approach	Rental-led; price incentives	Relationship & service-led	Quality & brand reputation-led
Digital Marketing Adoption	Moderate	High	High
After-sales Support	Standard	Extensive (dedicated site teams)	Extensive (Doka Academy + field)

Table 3 presents a multi-dimensional picture of how each company carves its competitive niche. The findings confirm that the three companies, while occupying the same broad market, adopt fundamentally different strategic postures.

PERI India's total-solution provider positioning is the most resource-intensive and relationship-driven approach. By deploying dedicated site engineering teams, providing formwork planning services using BIM software, and offering post-pour support, PERI creates deep switching costs for its clients. This strategy is particularly effective with Tier-1 contractors and large developers who value seamless project delivery over cost minimisation. PERI's BIM integration capability is a notable differentiator in India's growing smart construction landscape, where BIM adoption is being actively promoted by the government through the National BIM Mission.

Doka India's positioning as a technology and quality leader resonates strongly with institutional clients and government infrastructure projects where product performance, compliance, and international certification standards are non-negotiable. The Doka Academy — Doka's proprietary training and certification platform — is a powerful brand asset that simultaneously builds contractor capabilities and deepens Doka loyalty. In markets where skilled formwork operators are scarce, the ability to train and certify contractors creates a symbiotic marketing strategy.

MEVA India's value-for-money positioning serves a strategically important market segment that is often overlooked by premium players: the large and growing universe of Tier-2 and Tier-3 contractors executing mid-range residential projects in semi-urban and Tier-2 cities. As India's residential construction increasingly spreads beyond metropolitan centres into cities like Nashik, Coimbatore, Bhopal, and Lucknow, this market segment presents significant growth potential. MEVA's focus on low total cost of ownership, ease of product use, and competitive rental rates positions it well for this trajectory.

On digital marketing adoption, both PERI and Doka demonstrate high engagement, reflecting a broader global trend of B2B digitalisation. MEVA's moderate digital presence represents both a gap and an opportunity. Strengthening digital channels — through content marketing, SEO-optimised technical resources, and virtual product demonstrations — could meaningfully expand MEVA's brand visibility among the growing base of digitally active Indian contractors and developers.

4.4 SWOT Analysis

Table 4: SWOT Analysis — MEVA, PERI, and Doka India Operations

SWOT	MEVA	PERI	DOKA
Strengths	Cost-competitive; simple systems; established European reputation	Widest product range; strong engineering support; pan-India network	Global brand equity; Doka Academy; strong rental fleet management
Weaknesses	Limited digital presence; smaller depot network; lower brand recall	Premium pricing limits SME access; complexity of system selection	Relatively fewer depot locations; higher cost barrier for small contractors
Opportunities	Growing Tier-2 city residential boom; affordable housing segment	Smart city projects; high-rise boom; BIM-integrated formwork planning	RERA-driven quality compliance; innovation in aluminium formwork segment
Threats	Local competition; price-sensitive market; aluminium formwork substitutes	Economic slowdown; competition from domestic players; rising logistics costs	Currency fluctuation; import dependency; increasing local brand alternatives

The SWOT analysis in Table 4 synthesises strategic insights across internal competencies and external market dynamics.

MEVA India's primary strength lies in its cost competitive positioning and the inherent simplicity of its formwork systems, which reduce the skill barrier for contractors. However, its relatively limited depot network and lower brand recall compared to PERI and Doka constrain its growth potential. The biggest opportunity for MEVA lies in the affordable housing segment and the Tier-2 city residential boom, where its value-pricing strategy is a natural fit. The primary threat comes from domestic aluminium formwork manufacturers — particularly companies like Ultratech Cement's subsidiary and regional players — who are increasingly offering competitive products at lower price points targeting the same customer segments.

PERI India's strengths are the most diverse, encompassing product breadth, engineering service integration, and pan-India logistics capability. However, the premium pricing associated with PERI's total-solution model creates accessibility barriers for small and medium-sized contractors, limiting its addressable market. Opportunities in BIM-integrated construction, smart city projects, and RERA-driven quality compliance align well with PERI's service and technology capabilities. Threats include economic slowdown cycles, which disproportionately affect large real estate developments, and competition from domestic players who are increasingly matching system formwork quality at lower costs.

Doka India's global brand equity and the Doka Academy ecosystem are powerful long-term competitive assets. However, import dependency for certain product components creates vulnerability to currency fluctuations and supply chain disruptions — a lesson reinforced by the COVID-19 pandemic. The opportunity landscape for Doka is particularly strong in the premium high-rise residential and government infrastructure segments, where quality compliance is paramount. The RERA regulatory framework, which mandates quality standards and delivery timelines, indirectly drives demand for reliable, high-performance formwork systems — a segment where Doka's positioning is naturally aligned.

5. CONCLUSION

This paper has presented a structured comparative analysis of the strategic marketing approaches of three leading formwork companies — MEVA India, PERI India, and Doka India — operating in the Indian residential construction market. Drawing on secondary data from company publications, industry reports, trade press, and academic sources, the study has demonstrated that while all three companies share European heritage and compete within the same broad market, they deploy markedly differentiated marketing strategies shaped by distinct corporate philosophies, resource capabilities, and target customer orientations.

PERI India emerges as the market leader in strategic comprehensiveness, combining the widest product range, the most extensive distribution network, the strongest service-integration model, and the highest digital marketing investment. Its total-solution provider positioning creates deep customer relationships and substantial switching costs, enabling premium pricing sustainability. PERI's BIM capability and contractor training programmes represent forward-looking investments aligned with the industry's digital and quality transition.

Doka India positions itself as a technology and quality leader, leveraging global brand prestige, the Doka Academy training ecosystem, and a rental-dominant business model to serve high-end residential and infrastructure clients. Its premium positioning is well-suited to the RERA-driven quality compliance environment and the growing demand for certified, high-performance formwork systems in India's institutional construction sector.

MEVA India occupies a strategically distinct value-positioning niche, targeting Tier-2 and Tier-3 contractors through competitive pricing, simplified product systems, and cost-efficiency messaging. While its depot network and digital presence are comparatively limited, its value proposition aligns strongly with the enormous and growing market segment of semi-urban residential construction. Strategic investments in digital marketing and depot network expansion could significantly amplify MEVA's competitive reach.

The study identifies several broader strategic implications for the Indian formwork market. First, as RERA compliance requirements elevate quality standards across the residential sector, the value-to-premium migration of formwork selection is likely to continue, creating growth opportunities for all three companies in their respective positioning tiers. Second, the accelerating adoption of BIM, digital project management, and modular construction techniques in India is reshaping formwork specifications, favouring companies with integrated digital capabilities — a dimension where PERI and Doka are better positioned relative to MEVA. Third, the expansion of residential construction into Tier-2 and Tier-3 cities, driven by PMAY and Smart Cities Mission, will require all three companies to rethink their logistics and after-sales support models to serve geographically dispersed customers effectively.

For domestic Indian formwork companies and emerging local players, the findings of this study offer a strategic blueprint. Rather than competing on all fronts simultaneously, market-specific positioning — whether value-engineering, service-integration, or technology-leadership — combined with strong after-sales support and relationship marketing, appears to be the key to sustainable competitive advantage in India's dynamic residential construction formwork market.

Future research should explore primary data perspectives through contractor and developer surveys, examine the impact of digital marketing ROI in B2B construction contexts, and investigate the competitive dynamics introduced by domestic aluminium formwork manufacturers in greater depth.

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