

**Intesco
Research
Group**

BATHROOM AND LAVATORY EQUIPMENT. RUSSIAN MARKET OF BATHROOM AND LAVATORY EQUIPMENT. FORECAST FOR 2013 - 2015



MOSCOW 2012

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MARKET OF BATHROOM AND LAVATORY EQUIPMENT

Goal of research:

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS DEVELOPMENT FOR 2013-2015

Regions of research:

RUSSIA, REGIONS OF RF

Basic units of research:

VOLUME OF RUSSIAN MARKET OF BATHROOM AND LAVATORY EQUIPMENT
TRENDS ON RUSSIAN MARKET OF BATHROOM AND LAVATORY EQUIPMENT
DISTRIBUTION CHANNELS ON RUSSIAN MARKET OF BATHROOM AND LAVATORY EQUIPMENT

MAIN PLAYERS ON RUSSIAN MARKET OF BATHROOM AND LAVATORY EQUIPMENT

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FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF BATHROOM AND LAVATORY EQUIPMENT FOR 2013-2015

Russian largest enterprises profiled:

UGRAKERAM, CJSC

KIROVSKAYA KERAMIKA, CJSC
SUBSIDIARY OF KERAMIKA, LLC IN NOVOCHEBOKSARSK
SAMARSKIY STROYFARFOR, LLC
VERKH-ISETSKIY METALLURGICHESKIY ZAVOD, OJSC

Information sources used:

Federal State Statistics Service
Federal Custom Service
Federal Tax Service
Evaluation of Experts of the Branch
Retail sales statements
Data of the main players of the branch
Printed and electronic publications of the branch

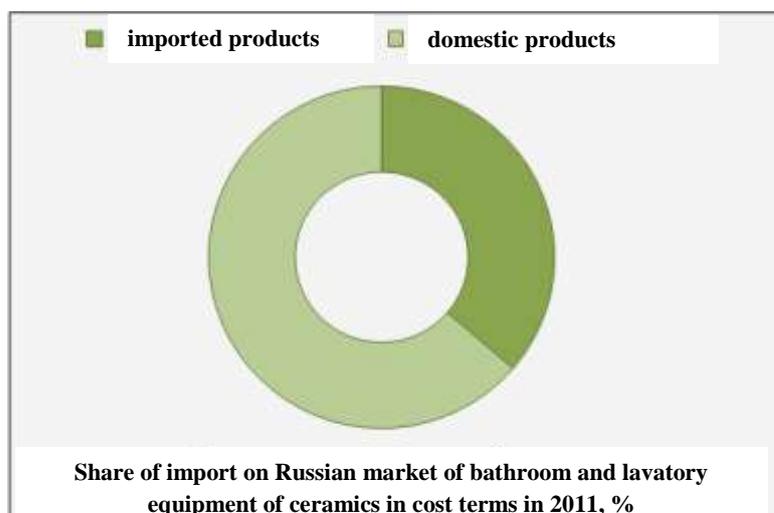
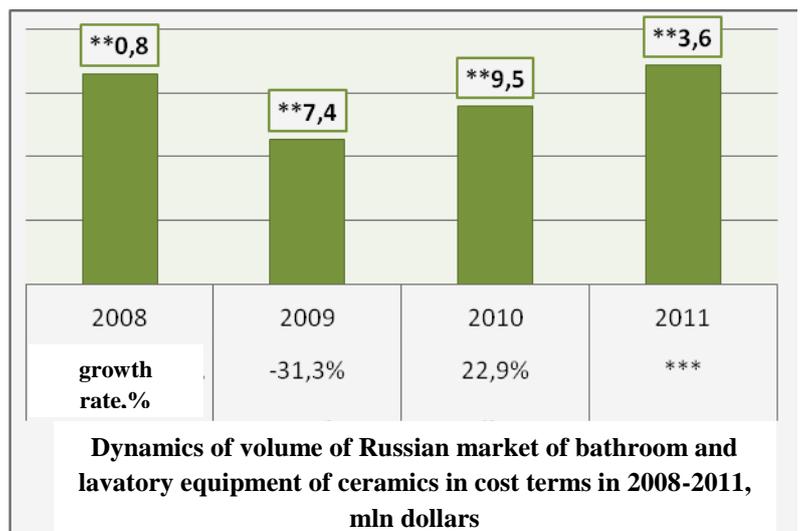
The research contains 100 Schedules, 71 Diagrams, 112 Tables, 7 Schemes

EXTRACTS FROM THE RESEARCH

CHAPTER 3

VOLUME OF RUSSIAN MARKET
OF BATHROOM AND LAVATORY
EQUIPMENT

In 2009 due to reduction of building activities and decline in well-being of people because of crisis Russian market of bathroom and lavatory ceramic equipment in cost terms dropped by 31,3% and amounted to **7,4 mln dollars. In 2010 market of products of this segment began to recover. In 2011 volume of market of sanitary ware of this category exceeded the pre-crisis level and amounted to **3,6 mln dollars.



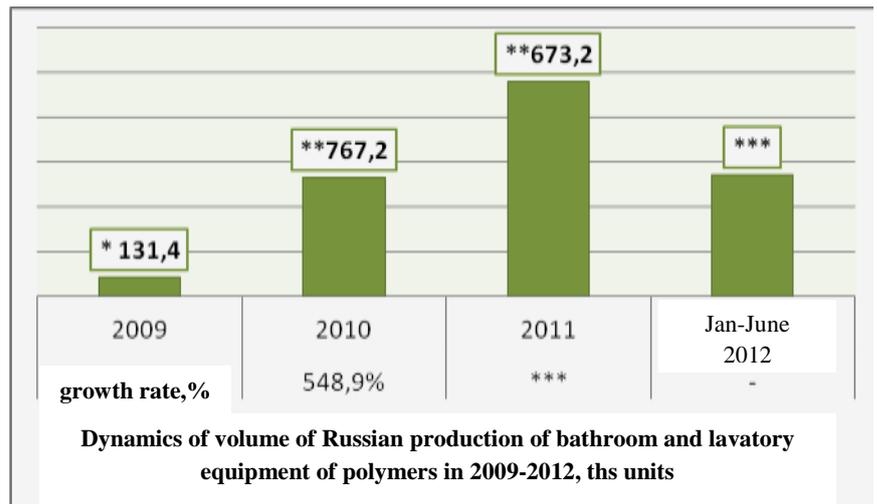
In 2011 in the structure of Russian market of ceramic sanitary ware in cost terms domestic products prevailed and made up **%. Share of import of bathroom and lavatory equipment of ceramics amounted to ***%.

CHAPTER 7

**PRODUCTION OF BATHROOM
AND LAVATORY EQUIPMENT IN
RUSSIA**

In 2009 volume of production of bathroom and lavatory equipment of polymers amounted to * 131,4 ths units. In 2010 output of products of this segment grew 6,5 times. Such a significant increase of production of equipment of polymers is associated with increase of demand for such types of goods as

shower cabins and baths of acryl (acrylic acid derivatives polymers), whirlpool baths, polypropylene pipes and other engineering sanitary ware. In 2011 output volume continued increasing, growth rate amounted to **%, the rate reached **673,2 ths units.



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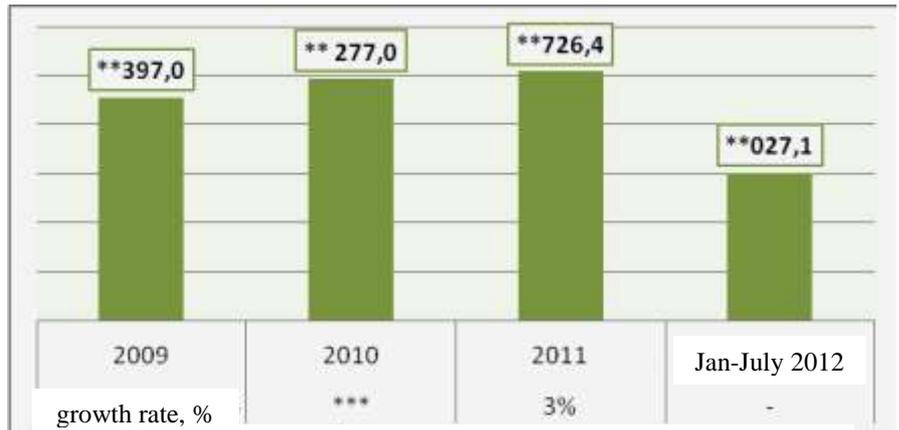
bathroom and lavatory equipment of polymers amounted to 9%.

In January-July 2012 81,3% of output of bathroom and lavatory equipment of polymers was constituted by Moscow (**%) and Novosibirsk (**%) regions. **% of the total amount of products of this segment was manufactured in Vladimir region, 3,2% - in Pskov region. Share of other regions producing

CHAPTER 9

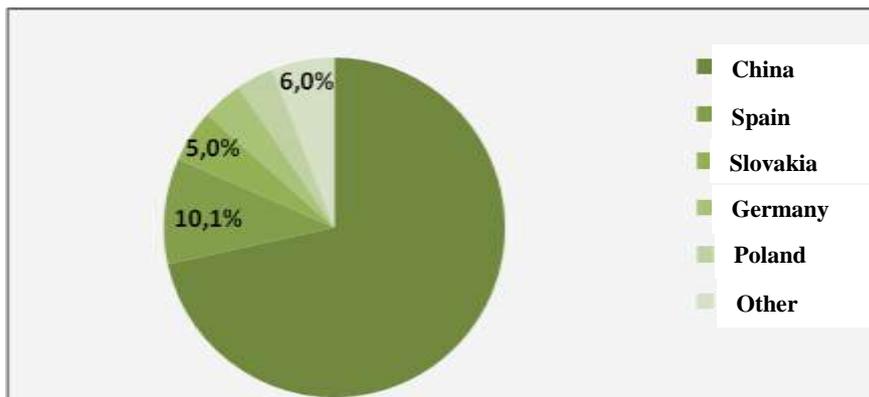
ANALYSIS OF IMPORT

In 2010 rate of delivery volumes of products of this segment on Russian market was equal to **277 tons, that is by **% more than in previous year. In 2011 import volume of bathroom and lavatory equipment continues its gradual growth - **726,4 tons were delivered to Russia within the year specified.



Dynamics of Russian import of bathroom and lavatory equipment of ferrous metals in 2009 – June 2012, tons

In the first half of 2012 the largest volume of bathroom and lavatory equipment of ferrous



Structure of Russian import of bathroom and lavatory equipment of ferrous metals by supplying countries in January – July 2012 in physical terms, %

metals in physical terms was constituted by products from China, its share amounted to **%. One tenth of Russian import was constituted by Spanish products (10,1%). 5% was imported from Slovakia, **% - from Germany.

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