

The Russian market of thermal insulation substance materials. Issue 3.

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## The Russian market of thermal insulation substance materials. Issue 3.

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In March 2007 the marketing agency DISCOVERY Research Group has carried out the research of the Russian market of heat-insulating materials

To the Russian share in the world's heat-insulating materials consumption is 4%.

The world's heat-insulating materials market is estimated in 20-25 billion dollars and, by experts opinion, in the nearest 10-12 years can already be doubled, as the application of heat-insulating materials in construction becomes practically obligatory. Speaking about Russia as a whole, the general need for the heaters for all the branches of the country will reach 50-55 million mi in 2010 , in real estate construction - 18-20 million mi.

The Russian market of heat-insulating materials size is 17 million cubic metres. The structure of heaters manufacturing in Russia is close to the structure which has developed in economically developed countries of the world where fibrous heaters occupy 60-80 % in general release of heat-insulating materials. According to the experts, ball foam plastic occupies about 30 %. The remained part of the market is divided between different kinds of mineral cotton wool: fiber glass occupies approximately 30 % and stone cotton wool - 40 %. According to the forecasts, the share of products from stone cotton wool will annually increase by 3-5 % due to the share of materials from fiber glass and poly foam reduction. Extruded polystyrene is considered to be the most active segment, which potential, by experts estimations, annually increases at 25-30 %.

Despite the lowering of growth rates up to 10-12 % in 2006, the Russian market of heat-insulating materials is considered to be one of the most quickly developing in Europe. In conditions of construction, repair, painting and decorating works increasing, qualitative heat-insulating materials are rather essential goods in the Russian market of building materials.

The increased demand for modern kinds of heat-insulating materials allows the leading foreign companies to sell successfully their products in Russia. By expert estimations, the European manufacturers control more than 70 % of the domestic isolation market.

The leading players in the heat-insulating materials market are URSA, Saint-Gobain and Rockwool. By analysts' estimations, at the end of 2006 the leaders' positions looked as follows: URSA Eurasia - 30 %, Rockwool International - 25 % and Saint-Gobain Isover - 15 % of the market. We should note that for two

years the Russian manufacturers have lost about 20 % of the market in total.

The leaders of the Russian construction market, consuming a significant part of the heaters, choose high-quality imported products rather than thermal insulation made in the Russian Federation. It is necessary to modernize production (that is to spend nearly 12-15 million euros for a modern line) in order to manufacture high-quality products.

The Russian companies have recently started construction and modernization of factories for manufacturing heat-insulating materials that should affect the quality improvement of their production inevitably. In our opinion, in short-term period it will lead to slowing down, and in the further - to a stop of the loss process of market positions of the Russian manufacturers as they can successfully compete with the western companies.

Besides we should not forget about the growth of state investments into construction sphere: the Russian manufacturers will be the first who can count on government contractual work.

In these conditions the foreign companies actively pass from import and distribution to manufacturing and distribution.

The advantage of such a strategy is in decreasing expenses for logistics and for the customs duties that reduces the final price of a product and reduces terms of its delivery to the consumer. According to the experts, delivery and the customs control passage increase cost of 1 m<sup>2</sup> of thermal insulation almost twice as much as – from \$ 5 to \$ 9.

The participants of the Russian market of thermal insulation connect the prospects of its growth with the improvement of investment climate, development of manufacture, increase in volumes of construction.

The aim of the research: to describe the condition of the Russian market of thermal isolation materials

The research objectives:

To determine the market of thermal isolation materials size and its segments

To determine the growth rates

To describe the problems and perspectives of this market development

To give a general characteristic of thermal isolation materials manufacturing in Russia.

To describe the key regional thermal isolation materials markets.

To define shares of trade marks and manufacturers.

To characterize consumer properties of various commodity groups of thermal isolation materials.

To characterize activity, manufacturing volumes and market shares of the basic players in the thermal isolation materials markets.

To describe plans and projects of the market players for manufacturing thermal isolation materials.

Method of data analysis

Traditional content-analysis of the documents

Informational base of the research

1. Printed, electronic ,business and specialized publications.
2. Internet resources
3. Companies' materials
4. Analytical overview articles in the press
5. The results of the researches by marketing and consulting agencies
6. Expert estimation
7. Interview with the producers and other market members.
8. The materials of branch institutions and data bases.
9. Discovery Research Group data bases

## **Table of Content**

The list of tables and diagrams

Abstract

Part 1. Technological characteristics of the research

The aim of the research

Objectives of the research

Subject of the research

Methods of data gathering

Methods of data analysis

Informational base of the research

Part 2. The main figures of the heat-insulating materials market

1. The heat-insulating materials market's volume and growth rates? The forecast up to 2010.

The market volume in natural terms and the forecast until 2010

The market volume in value terms and the forecast until 2010

Growth rates of market volume

2. Volume, structure and growth rates of heat-insulating materials production

Heat-insulating materials production in Russia

Russian imports of heat-insulating materials

Frequency of heat-insulating materials usage by building companies

3. Position of the leading heat-insulating materials market players

4. Growth and slowing-down factors of heat-insulating materials market

5. The Russian heat-insulating materials market development tendencies

Part 3. Development of the Russian regional heat-insulating materials markets

1. Heat-insulating materials markets of St.-Petersburg and Leningrad region

2. Heat-insulating materials market of Ural

3. Heat-insulating materials market of Siberia

Part 4. The leading players in the Russian heat-insulating materials market.

URSA Eurasia

Saint-Gobain Isover

Rockwool

Paroc

Knauf

Elektroschit-TM-Samara

Termosteps

Izorok

Penopleks-holding

Volgaburmash

TIZOL

TehnoNIKOL

Dow Chemical

Part 5. Market players' projects for building new production capacities

Closed JSC «Zavod Minplita» - a plant situated in Novosibirsk

Knauf – a plant situated in Stupinsk region of Moscow area

Part 6. Features of different kinds of heat-insulating materials

1. Comparison characteristics of different heat-insulating materials

2. Different kinds of heat-insulating materials

Mineral cotton

Foamed polystyrene

Foamed polyethylene

Vacuum panel

Ecocotton

Foamed insulating materials

Sprayed polyurethane

Heat-insulating concrete

Heat-insulating plaster

Rubber heat insulation

Foam glass

The research contains 5 tables and 12 diagrams.

The list of them will be given by request.



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