



**Intesco
Research
Group**

WALLPAPER MARKET



MOSCOW 2015

TABLE OF CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY	8
EXTRACTS FROM RESEARCH.....	10
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	13
ABOUT INTESCO RESEARCH GROUP	21

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population in Russia

Population size

Largest cities

Social standard of living

Economic activity

1.2. Economic situation

Dynamics of economic development

Stability of state budget

1.3. Special Economic Zones

1.4. Development of business in Russia

1.5. Investment potential

Russia in general

Regions

1.6. International Russian position

RF share in the population of the world

2. SUBJECT OF RESEARCH

2.1. Types of wallpapers

2.2. Classification

By ARCP

By FEA CN

By ARCPEA

3. WORLD MARKET

3.1. World export

Dynamics by years

Volumes by countries of origin

Volumes by types

3.2. Import volumes by countries of destination

3.3. Trends on the world market

3.4. Position of Russia on the world market

4. VOLUME OF THE RUSSIAN MARKET

4.1. Dynamics in physical and cost terms

4.2. Import content on the Russian market

4.3. Product consumption in Russia

5.1. Competition

5.2. Political factors

- 5.3. State regulations
- 6.1. Quality and safety of products
- 6.2. Range of products expansion
- 6.3. Photo wallpapers segment development
- 6.4. Novelties of the market
- 6.5. Investment projects

9. RAW MATERIAL BASE (WALLPAPER BASE)

- 9.1 Production structure by types
- 9.2 Production volume by federal districts of RF
- 9.3 Production volumes by regions of RF
- 9.4 Import

Dynamics of volume by years

Volume by countries of origin

Volumes by producing companies

- 9.5 Export

Dynamics of volume by years

Volume by countries of destination

10. WALLPAPERS PRODUCTION

- 10.1 Wallpaper and similar materials for walls papering

Production structure by types

Dynamics by years

Dynamics of months

Production volume by federal districts of RF

Production volume in regions of RF

- 10.2 Wallpapers production and paper borders

Dynamics by years

Dynamics of months

Production volumes by federal districts of RF

Production volumes in regions of RF

- 10.3 Vinyl wallpapers and borders production

Dynamics by years

Dynamics of months

Production volumes by federal districts of RF

Production volumes in regions of RF

- 11.1. By proceeds volume (up to 2013)

- 11.2. By profitability

12. IMPORT

- 12.1. Wallpaper and similar wall coverings

Structure by types

Dynamics by years

Dynamics of months

Volumes by countries of origin

12.2. Wallpaper and similar decorated wall coverings

Dynamics by years

Dynamics by months

Volumes by countries of origin

Volumes by producing companies

13. EXPORT

13.1. Wallpaper and similar wall coverings

Structure by types

Dynamics of the volume by years

Dynamics of the volume by months

Volumes by countries of destination

13.2. Decorated wallpaper and similar wall coverings

Dynamics of the volume by years

Dynamics of the volume by months

Volumes by countries of destination

14.1. Paper wallpapers and borders

Dynamics by years

Dynamics by months

Volumes by federal districts of RF

14.2. Vinyl wallpapers and borders on paper basis

Dynamics by years

Dynamics by months

Volumes by federal districts of RF

15.1. Paper wallpapers

Dynamics by years

Dynamics by months

Volumes by regions of RF

15.2. Vinyl wallpapers

Dynamics by years

Dynamics by months

Volumes by regions of RF

15.3. Factors of the price

Producing country

Material

Upper layer

Uniqueness

16.1. “KOF “PALITRA” LLC

Reference information

Activity types

Shareholders/founders

Subsidiaries

Balance sheet

Profit and loss statement

Cash flow statement

Financials

16.2. «ERISMANN» LLC

Reference information

Activity types

Shareholders/founders

Subsidiaries

Balance sheet

Profit and loss statement

Cash flow statement

Financials

16.3. «ART» LLC

Reference information

Activity types

Shareholders/founders

Balance sheet

Profit and loss statement

Cash flow statement Table 75. Cash flow statement of «ART» LLC

Financials

16.4. «MAYAKPRINT» LLC

Reference information

Activity types

Shareholders/founders

Balance sheet

Profit and loss statement

Cash flow statement

Financials

16.5. «ELISIUM» LLC

Reference information

Activity types

Shareholders/founders

Balance sheet

Profit and loss statement

Cash flow statement

Financials

17. FORECAST OF THE MARKET DEVELOPMENT TILL 2018

ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

WALLPAPER MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT UNTIL 2018

Regions of research:

WORLD, RUSSIA REGIONS OF RF

Main blocks of research:

WORLD MARKET

RUSSIAN WALLPAPER MARKET VOLUME

FACTORS OF THE MARKET

TRENDS OF THE MARKET

DISTRIBUTION CHANNELS

CONSUMER PREFERENCES

RAW MATERIAL BASE (WALLPAPER BASE)

WALLPAPERS PRODUCTION

LARGEST RUSSIAN PRODUCERS

IMPORT

EXPORT

PRODUCER PRICES

RETAIL PRICES

FORECAST OF THE MARKET DEVELOPMENT UNTIL 2018

Profiles are made for the following largest Russian enterprises:

«KOF «PALITRA» LLC

«ERISMANN» LLC

«ART» LLC

«MAYAKPRINT» LLC

«ELISIUM» LLC

Information about the main factories' production volume, financials of activity, balance sheet, profit and loss statements, cash flow statements, subsidiaries and some other information is also presented.

Information sources used:

- The Federal State Statistics Service
- The Ministry of Economic Development of RF
- The Federal Customs Service
- The Federal Tax Service
- Industry experts' estimates
- Data of the main players of the branch
- Printed and electronic publications of the branch

The research contains 68 schedules, 30 diagrams, 86 tables and 8 pictures.

EXTRACTS FROM RESEARCH

CHAPTER 3

WORLD MARKET

World trade of wallpapers and similar wall coverings in 2010-2013 increased steadily. The most intensive rate of growth was marked in 2011 (***%), and in general during the period export volume in physical terms in the world increased by ***%. According to

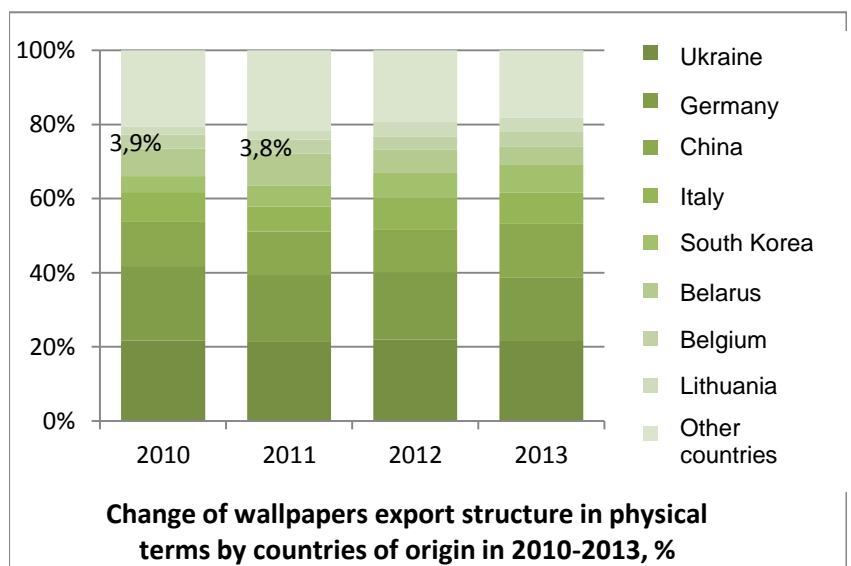
Intesco Research Group analysts, in 2014 the trend to growth of the international supplies kept and export amounted to over *** ths tons.

The main wallpapers export volume in 2010-2013 was distributed among *** categories – vinyl wallpapers and the category including different wallpapers and wall

coverings, including made of paper. Volume of vinyl wallpapers supplies increased by ***% during the specified years, and the products belonging to other wallpaper category, was exported less actively (in 2012 the decrease by ***%). This dynamics can be partially explained by classifications changes.

Textile wallpapers export was insignificant – in 2010-2012 it amounted to *** tons a year, in 2013 the parameter increased to *** tons. International trade of ingrain wallpaper paper was equal to *** ths tons, and in 2013 volume of these products supplies was extremely low – *** tons.

The largest quantity of vinyl wallpapers is exported from Ukraine, Germany, China – ***, *** and ***% respectively. The leader by other wallpapers supplies was Belarus – **%, and Germany (**%), Italy and Ukraine (**%).



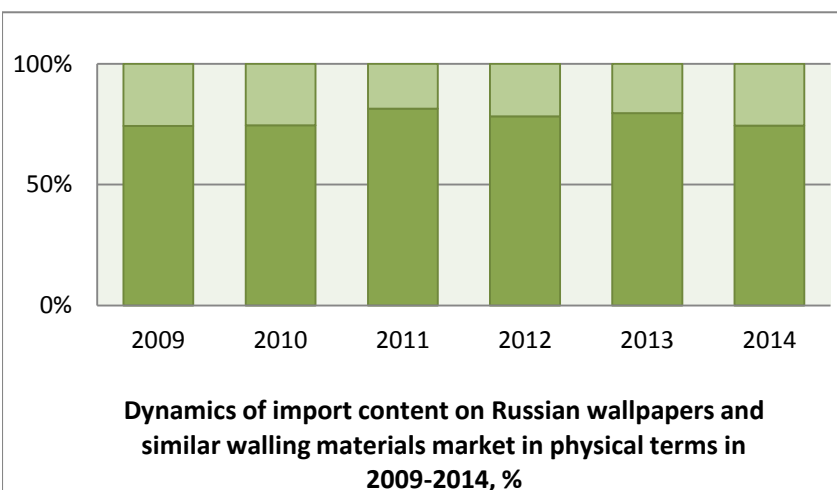
CHAPTER 4

VOLUME OF THE RUSSIAN MARKET

While the calculation of the market volume in physical terms the following measures were adopted: ***. According to Intesco Research Group, in 2014 volume of the domestic wallpapers market in physical terms amounted to *** mln m2. In 2012-2014 the market parameters decreased that was due to the import decrease. Foreign products despite of



the growing production prevails on the Russian decorating materials market. Besides, the decrease of wallpapers market characterizes the construction cyclicality. The active housing construction in the first post-crisis years created the high demand for wallpapers in recent years this process slowed down so the supplying markets slowed down the dynamics.



The peak of wallpapers and similar products for papering consumption was marked in 2011. Then the average annual per capita consumption amounted to almost *** sq. meters/person. In the following years this parameter decreased and by 2014 amounted to *** sq.

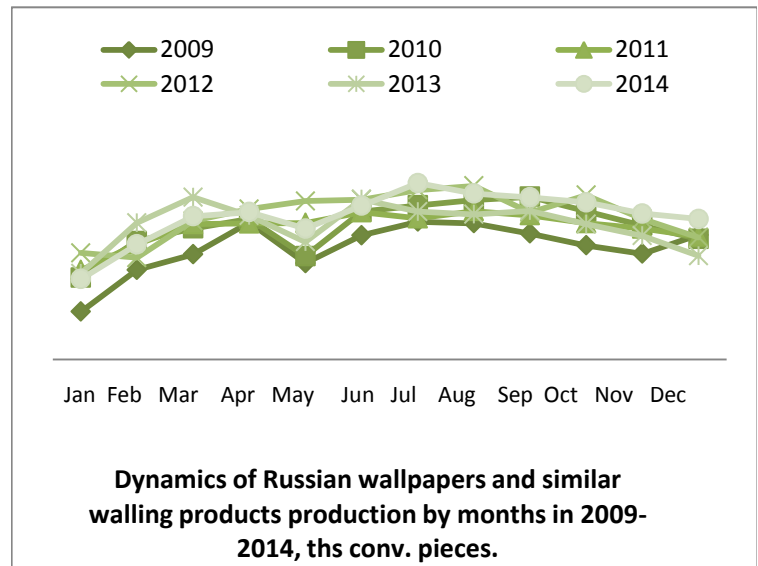
meters/person. The descending dynamics was explained by the wide distribution of alternative types of walling materials including painting, decorative pasting etc.

CHAPTER 10

WALLPAPERS PRODUCTION

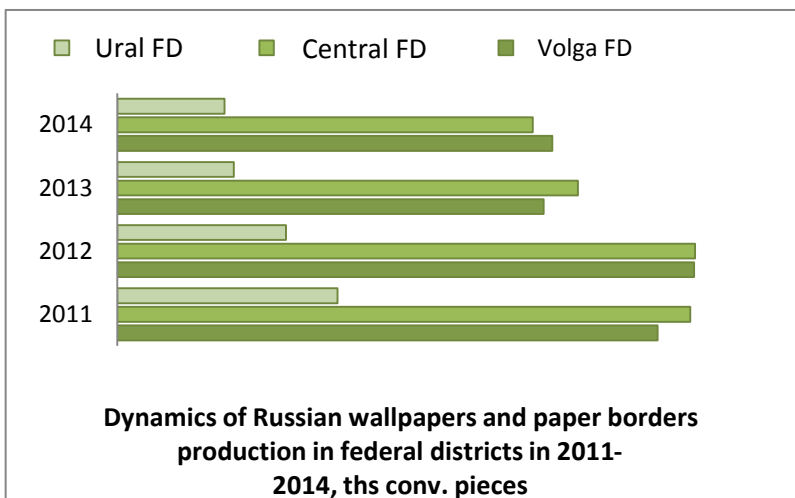
Diversity of wallpapers produced in Russia mass consumption was quite limited always. Statistically, there is more *** of Russian wallpapers and similar materials for wall covering production in 2014 belonged to paper products (***%). These are the cheapest wallpapers both in production, and for the consumer.

Vinyl wallpapers on paper basis have a great share along with paper – about one third of all production. Technology of their production is more expensive, however, the demand for them is very high due to the attractive esthetic qualities. Other types of wallpapers made ***% in 2014, they included vlieseline, textile wallpapers and other.



Wallpapers and similar materials for walls covering production in 2014 reached *** mln conv. pieces. It was ***% more, than in the previous year.

However, it should be marked that in 2013 production decreased by **%, so the growth in 2014 was compensating. Dynamics of Russian wallpapers production is characterized by cyclicity with the periods of the decrease and increase, but in general there is a trend to growth.



LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

2. SUBJECT OF RESEARCH

3. WORLD MARKET

Schedule 18. Dynamics of wallpapers export volume in the world in physical terms in 2010-2014*, tons

Schedule 19. Dynamics of wallpapers export volume in the world in cost terms in 2010-2014*, ths dollars

Table 6. Wallpapers export volume in physical terms by countries of origin in 2010-2014, tons

Table 7. Wallpapers export volume in cost terms by countries of origin in 2010-2014, ths dollars

Diagram 5. Change of wallpapers export structure in physical terms by countries of origin in 2010-2013, %

Diagram 6. Change of wallpapers export structure in cost terms by countries of origin in 2010-2013, %

Table 8. Wallpapers export volume in physical terms by types in 2010-2013, tons

Table 9. Wallpapers export volume in cost terms by types in 2010-2013, ths dollars

Diagram 7. Change of wallpapers export structure in physical terms by types in 2010-2013, %

Diagram 8. Change of wallpapers export structure in cost terms by types in 2010-2013, %

Table 10. Wallpapers import volume in physical terms by countries of destination in 2010-2014, tons

Table 11. Wallpapers import volume in physical terms by countries of destination in 2010-2014, tons

Diagram 9. Change of wallpapers import structure in physical terms by countries of destination in 2010-2013, %

Diagram 10. Change of wallpapers import structure in cost terms by countries of destination in 2010-2013, %

Table 12. Top-15 countries with a positive trade balance in 2013

Table 13. Top-15 countries with a negative trade balance

4. VOLUME OF THE RUSSIAN MARKET

Schedule 20. Dynamics of Russian wallpaper market volume and similar walling materials in 2009-2014, ths m2

Schedule 21. Dynamics of Russian wallpaper market volume in cost terms in 2009-2014, mln rubles

Diagram 11. Dynamics of import content on Russian wallpapers and similar walling materials market in physical terms in 2009-2014, %

Schedule 22. Per capita annual wallpapers consumption in Russia in 2009-2014, m²/person.

Table 14. Parameters of wallpapers quality

Picture 2. The example of Russian wallpaper advertisement, based on the range width

Picture 3. The example of photo wallpapers in the cafe decoration

Picture 4. The example of colouring wallpapers

Table 15. Investment projects on wallpapers market in Russia

Picture 5. Distribution scheme of products on wallpapers market

Diagram 12. Consumer preferences on wallpapers market by types of products in 2014, %

Diagram 13. Consumer preferences on wallpapers market by producing country in 2014, %

Table 16. Renovation requirements according to the poll in May 2014

Table 17. Results of the poll in May 2014

9. RAW MATERIAL BASE (WALLPAPER BASE)

Diagram 14. Change of wallpaper base production structure by types in 2010-2014*, %

Schedule 23. Dynamics of wallpaper base production volume base in Russia in 2010-2014*, tons

Table 18. Volumes of wallpaper base production in federal districts of RF in 2010-2013, tons

Table 19. Volumes of wallpaper base production in regions of RF in 2010-2013, tons

Schedule 24. Dynamics of Russian wallpaper base import volume in physical terms in 2010-2014, tons

Schedule 25. Dynamics of Russian wallpaper base import volume in cost terms in 2010-2014, dollars

Table 20. Volumes of Russian wallpaper base import in physical terms by countries of origin in 2010- 2014, tons

Table 21. Volumes of Russian wallpaper base import in cost terms by countries of origin in 2010-2014, dollars

Diagram 15. Structure of Russian wallpaper base import by sender-companies in 2014, %

Table 22. Volumes of Russian wallpaper base import by sender-companies in 2012-2014, tons

Schedule 26. Dynamics of Russian wallpaper base export volume in physical terms in 2010-2014, tons

Schedule 27. Dynamics of Russian wallpaper base export volume in cost terms in 2010-2014, dollars

Table 23. Volumes of Russian wallpaper base export in physical terms by countries of destination in 2010-2014, tons

Table 24. Volumes of Russian wallpaper base export in cost terms by countries of destination in 2010-2014, dollars

10. WALLPAPERS PRODUCTION

Diagram 16. Structure of Russian wallpapers production by types in 2014, %

Diagram 17. Change of structure of Russian wallpapers production by types in 2009-2014, %

Schedule 28. Dynamics of Russian wallpapers and similar walling products production in 2009-2014, ths conv. pieces.

Schedule 29. Dynamics of Russian wallpapers and similar walling products production by months in 2009-2014, ths conv. pieces.

Table 25. Volumes of Russian wallpapers and walling materials production by months in 2009-2014, ths conv. pieces.

Schedule 30. Dynamics of Russian wallpapers and similar walling products production in federal districts in 2011-2014, ths conv. pieces.

Table 26. Volume of wallpapers and similar walling materials production in federal districts of RF in 2009-2014, ths. conv. piece

Diagram 18. Dynamics of Russian wallpapers and walling materials production structure by federal districts in 2011-2014, %

Schedule 31. Dynamics of Russian wallpapers and similar walling products production in largest regions in 2011-2014, ths conv. pieces.

Table 27. Volume of wallpapers and similar walling materials production in regions of RF in 2009-2014, ths conv. pieces.

Schedule 32. Dynamics of regional structure of Russian wallpapers and walling materials production in 2011-2014, %

Schedule 33. Dynamics of Russian wallpapers and paper borders production in 2009-2014, ths conv. pieces.

Schedule 34. Dynamics of Russian wallpapers and paper borders production by months in 2009-2014, ths conv. pieces.

Table 28. Volumes of Russian wallpapers production and paper borders by months in 2009-2014, ths conv. pieces.

Schedule 35. Dynamics of Russian wallpapers and paper borders production in federal districts in 2011-2014, ths conv. pieces.

Table 29. Volume of wallpapers and paper borders production in federal districts of RF in 2009-2014, ths. conv. piece

Diagram 19. Dynamics of Russian wallpapers and paper borders production structure by federal districts in 2011-2014, %

Schedule 36. Dynamics of Russian wallpapers and paper borders production in largest regions in 2011-2014, ths conv. pieces.

Table 30. Volume of wallpapers and paper borders production in regions of RF in 2009-2014, ths conv. pieces.

Diagram 20. Dynamics of regional structure of Russian wallpapers production and paper borders in 2011-2014, %

Schedule 37. Dynamics of Russian wallpapers and vinyl borders production volume in 2009-2014, ths conv. pieces.

Schedule 38. Dynamics of Russian wallpapers and vinyl borders production volume by months in 2009-2014, ths conv. pieces.

Table 31. Volumes of Russian wallpapers production and vinyl borders by months in 2009-2014, ths conv. pieces.

Schedule 39. Dynamics of Russian wallpapers and vinyl borders production volume in federal districts in 2011-2014, ths conv. pieces.

Table 13. Volume of wallpapers and vinyl borders production in federal districts of RF in 2009-2014, ths conv. pieces.

Diagram 21. Dynamics of Russian wallpapers and vinyl borders production structure by federal districts in 2011-2014, %

Schedule 40. Dynamics of Russian wallpapers and vinyl borders production volume in largest regions in 2011-2014, ths conv. pieces.

Table 32. Volume of wallpapers and vinyl borders production in regions of RF in 2009-2014, ths conv. pieces.

Diagram 22. Dynamics of regional structure of Russian wallpapers production and vinyl borders in 2011-2014, %

Table 33. Proceeds of the largest companies with the activity type according to ARCPEA «Wallpapers production» (code 21.24) during 2009-2013, ths rubles

Table 34. Proceeds and sales profitability of the largest enterprises producing wallpapers, in 2013

12. IMPORT

Diagram 23. Structure of wallpapers and similar walling materials import by types in physical terms in 2009-2014, %

Diagram 24. Structure of wallpapers and similar walling materials import by types in cost terms in 2009-2014, %

Schedule 41. Dynamics of Russian wallpapers and similar wall covering import in 2009-2014, tons

Schedule 42. Dynamics of Russian wallpapers and similar wall covering import in 2009-2014, ths dollars

Schedule 43. Dynamics of Russian wallpapers and similar wall covering import volume by months in 2009-2014, tons

Table 35. Volumes of Russian wallpapers and similar wall covering import by months in 2009-2014, tons

Schedule 44. Dynamics of Russian wallpapers and similar wall covering import volume by months in 2009-2014, ths dollars

Table 36. Volumes of Russian wallpapers and similar wall covering import by months in 2009-2014, ths dollars

Table 37. Volumes of wallpapers and similar walling materials import to Russia by countries of origin in 2009-2014, tons

Diagram 25. Dynamics of Russian wallpapers and similar wall covering import structure by countries of origin in physical terms in 2011-2014, %

Table 38. Volumes of wallpapers and similar walling materials import to Russia by countries of origin in 2009-2014, ths dollars

Diagram 26. Dynamics of Russian wallpapers and similar wall covering import structure by countries of origin in cost terms in 2011-2014, %

Schedule 45. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic import in 2009-2014, tons

Schedule 46. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic import in 2009-2014, ths dollars

Schedule 47. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic import volume, by months in 2009-2014, tons

Table 39. Volumes of Russian wallpapers and similar wall decorating covering including made of plastic import by months in 2009-2014, tons

Schedule 48. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic import volume, by months in 2009-2014, ths dollars

Table 40. Volumes of Russian wallpapers and similar wall decorating covering including made of plastic import by months in 2009-2014, ths dollars

Table 41. Volumes of Russian wallpapers and similar wall decorating covering including made of plastic import by countries of origin in physical terms in 2009-2014, tons

Diagram 27. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic import structure by countries of origin in physical terms in 2011-2014, %

Table 42. Volumes of Russian wallpapers and similar wall decorating covering including made of plastic import by countries of origin in cost terms in 2009-2014, ths dollars

Diagram 28. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic import structure by countries of origin in cost terms in 2011-2014, %

Table 43. Largest companies producing wallpapers and similar decorated walling materials including made of plastic, in 2014

Diagram 29. Structure of decorative wallpapers and similar walling materials import, including made of plastic, by producing companies in 2014, %

13. EXPORT

Diagram 30. Dynamics of Russian wallpapers export structure in physical terms by types in 2009-2014, %

Schedule 49. Dynamics of Russian wallpapers and similar wall covering export volume in physical terms in 2009-2014, tons

Schedule 50. Dynamics of Russian wallpapers and similar wall covering export volume in cost terms in 2009-2014, ths dollars

Schedule 51. Dynamics of Russian wallpapers and similar wall covering export volume in physical terms by months in 2009-2014, tons

Table 44. Volumes of Russian wallpapers and similar walling materials export in physical terms by months in 2009-2014, tons

Schedule 52. Dynamics of Russian wallpapers and similar wall covering export volume in cost terms by months in 2009-2014, ths dollars

- Table 45. Volumes of Russian wallpapers and similar walling materials export in cost terms by months in 2009-2014, ths dollars
- Table 46. Volumes of Russian wallpapers and similar walling materials export in physical terms by countries of destination in 2009-2014, tons
- Table 47. Volumes of Russian wallpapers and similar walling materials export in cost terms by countries of destination in 2009-2014, ths dollars
- Schedule 53. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic export, in physical terms in 2009-2014, tons
- Schedule 54. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic export, in cost terms in 2009-2014, ths dollars
- Schedule 55. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic export, in physical terms by months in 2009-2014, tons
- Table 48. Volumes of Russian wallpapers and similar decorated walling materials including made of plastic export, in physical terms by months in 2009-2014, tons
- Schedule 56. Dynamics of Russian wallpapers and similar wall decorating covering including made of plastic export, in cost terms by months in 2009-2014, ths dollars
- Table 49. Volumes of Russian wallpapers and similar decorated walling materials including made of plastic export, in cost terms by months in 2009-2014, ths dollars
- Table 50. Volumes of Russian wallpapers and similar decorated walling materials including made of plastic export, in physical terms by countries of destination in 2009-2014, tons
- Table 51. Volumes of Russian wallpapers and similar decorated walling materials including made of plastic export, in cost terms by countries of destination in 2009-2014, ths dollars
- Schedule 57. Dynamics of average producer price for wallpapers and paper borders in RF in 2012-2014, ths rubles/th conv. pieces
- Schedule 58. Dynamics of average producer price for wallpapers and paper borders in RF by months in 2012-2014, ths rubles/th conv. pieces
- Table 52. Average producer prices for wallpapers and paper borders in RF by months in 2012-2014, ths rubles/th conv. pieces
- Schedule 59. Average producer prices for wallpapers and paper borders by federal districts of RF in 2014, rub/th conv. pieces
- Table 53. Average producer prices for wallpapers and paper borders by federal districts of RF in 2012-2014, ths rubles/th conv. pieces
- Schedule 60. Dynamics of average producer price for paper-based wallpapers and vinyl borders in RF in 2012-2014, ths rubles/th conv. pieces
- Table 54. Average producer prices for paper-based wallpapers and vinyl borders in RF by months in 2012-2014, ths rubles/th conv. pieces
- Schedule 62. Average producer prices for paper-based wallpapers and vinyl borders by federal districts of RF in 2014, rub/th conv. pieces

- Table 55. Average producer prices for paper-based wallpapers and vinyl borders by federal districts of RF in 2012-2014, ths rubles/th conv. pieces
- Schedule 64. Dynamics of average retail prices for paper wallpapers in RF by months in 2009-2014, rub/10 m
- Table 56. Average retail prices for paper wallpapers in RF by months in 2009 – 2014, rub/10 m
- Table 57. Average retail prices for paper wallpapers by regions of Russia in 2009- 2014, rub/10 m
- Schedule 66. Dynamics of average retail prices for vinyl wallpapers in RF by months in 2009-2014, rub/10 m
- Table 58. Average retail prices for vinyl wallpapers in RF by months in 2009 – 2014, rub/10 m
- Table 59. Average retail prices for vinyl wallpapers by regions of Russia in 2009- 2014, rub/10 m
- Picture 6. Factors influencing the price
- Picture 7. The cost of different wallpapers by type of material
- Picture 8. The cost of certain types of wallpapers depending on the upper layer
- Table 60. Shareholders/founders of «KOF «PALITRA» LLC
- Table 61. Subsidiaries of «KOF «PALITRA» LLC
- Table 62. Balance sheet of «KOF «PALITRA» LLC
- Table 63. Profit and loss statement of «KOF «PALITRA» LLC
- Table 64. Cash flow statement of «KOF «PALITRA» LLC
- Table 65. Financials of «KOF «PALITRA» LLC
- Table 66. Shareholders/founders of «ERISMANN» LLC
- Table 67. Subsidiaries of «ERISMANN» LLC
- Table 68. Balance sheet of «ERISMANN» LLC
- Table 69. Profit and loss statement of «ERISMANN» LLC
- Table 70. Cash flow statement of «ERISMANN» LLC
- Table 71. Financials of «ERISMANN» LLC
- Table 72. Shareholders/founders of «ART» LLC
- Table 73. Balance sheet of «ART» LLC
- Table 74. Profit and loss statement of «ART» LLC
- Table 76. Financials of «ART» LLC
- Table 77. Shareholders/founders of «MAYAKPRINT» LLC
- Table 78. Balance sheet of «MAYAKPRINT» LLC
- Table 79. Profit and loss statement of «MAYAKPRINT» LLC
- Table 80. Cash flow statement of «MAYAKPRINT» LLC
- Table 81. Financials of «MAYAKPRINT» LLC
- Table 82. Shareholders/founders of «ELISIUM» LLC
- Table 83. Balance sheet of «ELISIUM» LLC
- Table 84. Profit and loss statement of «ELISIUM» LLC
- Table 85. Cash flow statement of «ELISIUM» LLC
- Table 86. Financials of «ELISIUM» LLC

17. FORECAST OF THE MARKET DEVELOPMENT TILL 2018

Schedule 67. Dynamics of Russian wallpaper market volume and similar walling materials in 2011-2014 and forecast for 2015-2018, ths m2

Schedule 68. Dynamics of import content on wallpapers and similar walling products market in physical terms in 2011-2018*, %

ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

INTESCO RESEARCH GROUP is the analytical group, having its principal directions of activity in development of high-quality business plans, feasibility studies and marketing researches of both Russia's and regional markets of RF. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven research and development methods. When conducting marketing researches and developing the business plans the group applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: "Vedomosti", "Kommersant-Dengi", "Rossiyskaya gazeta", "Forbes", "Russian Food Market", "FoodService", "MAXIM", "Partner: myasopererabotka", "Moe delo. Magazin", "Odnako", "Khlebopekarnoe proizvodstvo", "Producty i Pribyl", "Konditerskaya sfera/khlebopechenie", "Tsenovik", "RBK daily", "Unipack.Ru", etc.

OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

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