



**Intesco
Research
Group**

CERAMIC TILES AND RUSSIAN MARKET OF CERAMIC TILES



MOSCOW 2012

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Subject of research:

RUSSIAN MARKET OF CERAMIC TILES

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2012-2015

Regions of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

WORLD MARKET OF CERAMIC TILE
VOLUME OF RUSSIAN CERAMIC TILE MARKET
TRENDS ON THE RUSSIAN MARKET OF CERAMIC TILE
STATE REGULATION OF CERAMIC TILE MARKET
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PRODUCER PRICES FOR CERAMIC TILES IN RUSSIA
RETAIL PRICES FOR CERAMIC TILES IN RUSSIA
FORECAST OF RUSSIAN CERAMIC TILE MARKET DEVELOPMENT

Profiles are made for the following largest Russian enterprises:

«VELOR» CJSC
«STROYFARFOR» OJSC
«NOGINSK PLANT OF CONSTRUCTION PRODUCTS» LLC
«ZKS» LLC
«NEFRIT-KERAMIKA» OJSC

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

The sources of information, which are used in the research:

Federal State Statistics Service

The Ministry of Economic Development of RF

The Federal Customs Service

The Federal Tax Service

Industry experts' estimates

Reports on retail sales

Data of the main players of the branch

Printed and electronic publications of the branch

The research contains 64 schedules, 41 diagrams, 63 tables and 1 scheme.

EXTRACTS FROM RESEARCH

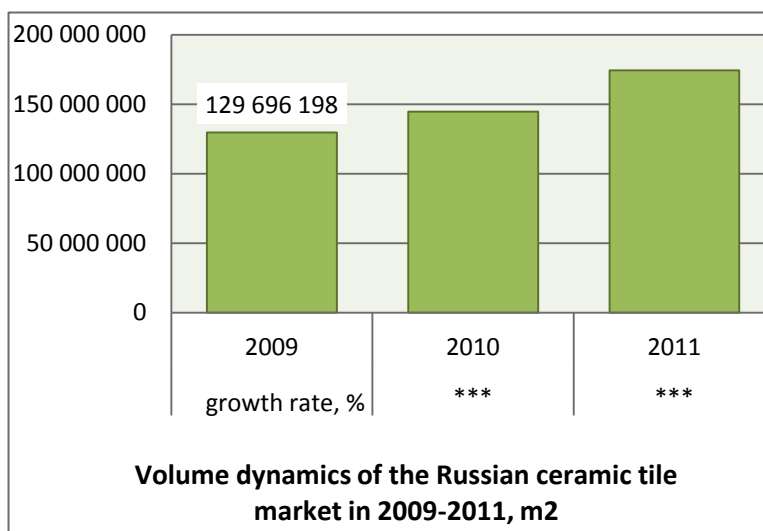
CHAPTER 4

VOLUME OF RUSSIAN CERAMIC
TILE MARKET

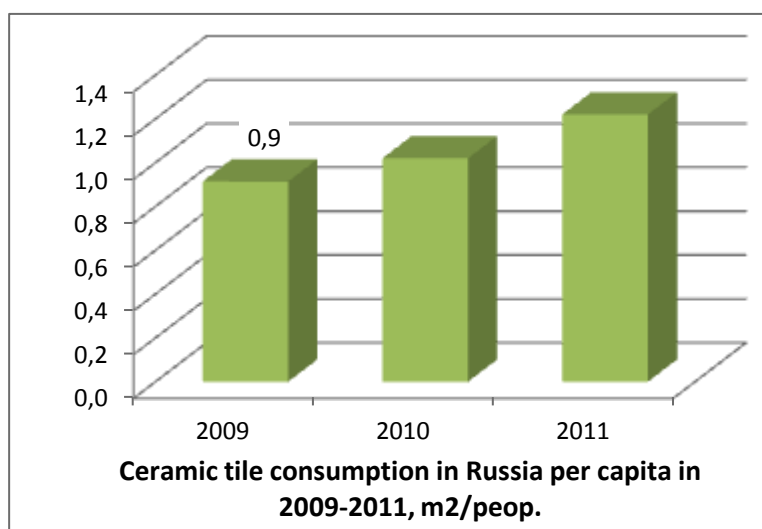
According to Intesco Research Group experts, the volume of the Russian ceramic tile market amounted to *** ths. m² in 2011, that is by **,5% more than that of 2010.

Each Russian citizen accounted for ** m² of ceramic tile in 2011. In comparison with the previous year the consumption growth amounted to ** m²/peop.

The market of ceramic tiles in Russia is largely provided by the *** production (**,8%). According to Intesco Research Group estimates, the share of *** products in



physical terms amounted to not more than **,21% in 2011.



CHAPTER 8

PRODUCTION OF CERAMIC TILE
IN RUSSIA

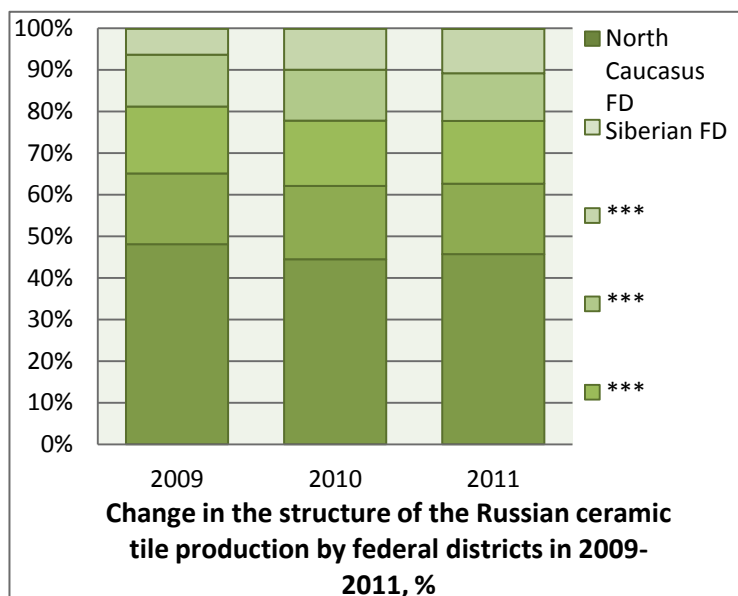
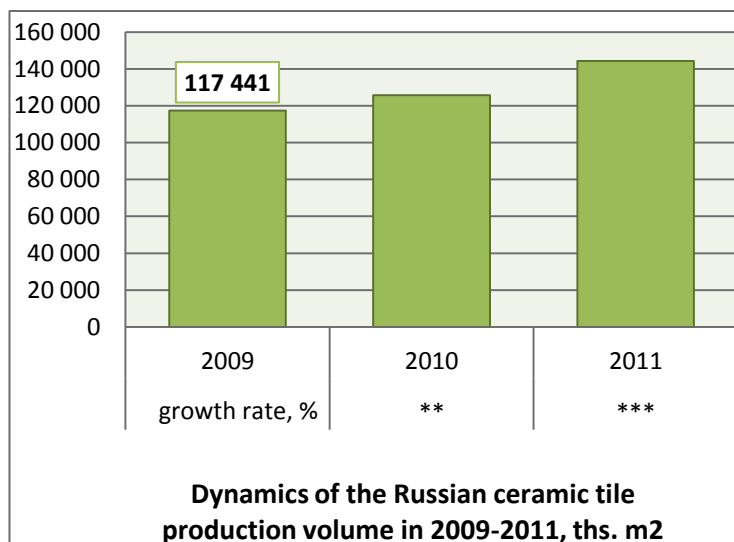
There is a tendency towards *** in the ceramic tile market. In 2011 the total production of all-type ceramic tile amounted to **,3 mln. m², that is by **,8% more than that of 2010.

The *** federal district was the leading ceramic tile producer among the federal districts of FR in 2011, where **,9 mln. m² of the construction material were

produced. The *** FD ranked second. Its production of ceramic tile amounted to **,4 mln. m².

The shares of the ** FD (by *,4%), the Southern FD (by **,1%), the ** FD (** %) *** in

the structure of ceramic tile production for the period of 2009-2011. On the contrary, the share of the ** Region increased by **,4% for 3 years.

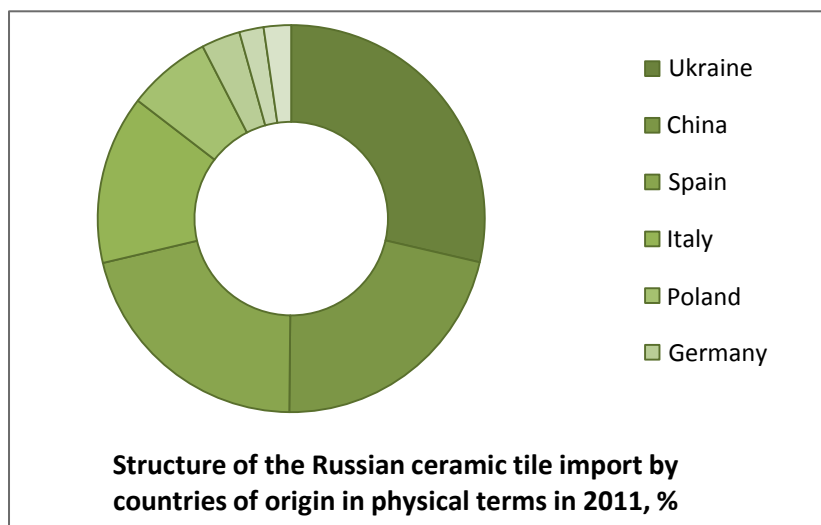
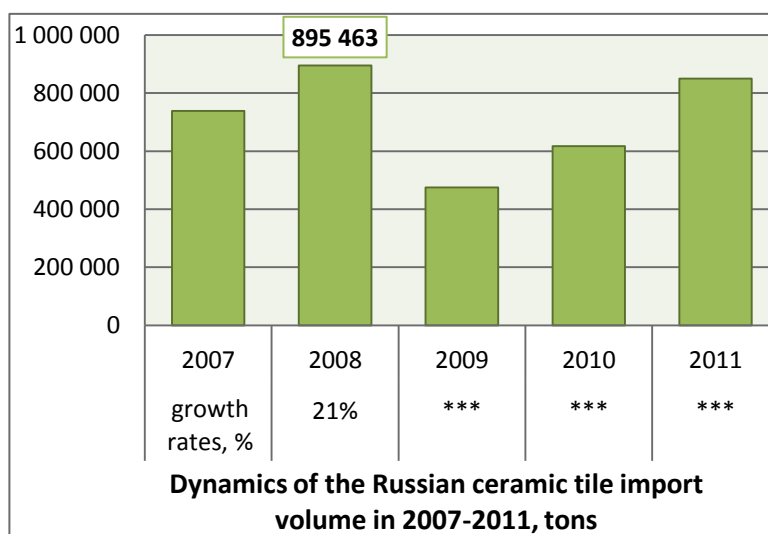


CHAPTER 11

ANALYSIS OF THE RUSSIAN
CERAMIC TILE IMPORT

There has been a tendency towards *** in the dynamics of ceramic tile import volume since 2010. In 2010 the import volume ** by ***% to **,5 ths. tons. In 2011 the import of ceramic tiles to Russia in physical terms amounted to **,2 ths. tons, that is by ***% more than that of 2010.

*** is the largest ceramic tile supplying country to the Russian market. Its volume of import increased last by **,4%. *** ranked second in the import volume. *** production accounted for about ***% in the structure of imported ceramic tile in the Russian market. The share of China amounted to ** in 2011%.



CHAPTER 12

ANALYSIS OF THE RUSSIAN
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There is a tendency towards *** in the dynamics of ceramic tile export. In 2010 the volume of the Russian export declined by **% and amounted to ***,5 ths. tons.

In 2011 **,1 ths. tons of ceramic tile were exported, that is by **% less than that of 2010.

*** accounted for the most part of the Russian ceramic tile export. In 2011 the material deliveries to it increased by **% amounted to **3 ths. tons. The largest importers are also *** and Kirghizia.



Gross proceeds of Russia from the sales of ceramic tile in the *** market of construction materials amounted to **% of the total cost of export in 2011. ** amounted to *** in the structure of export. The share of Azerbaijan accounted for **%.

*** in the Russian ceramic tile export is occupied by glazed ceramic

tiles (**,2%). Unglazed ceramic tiles accounted for **,8%.

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INFORMATION ABOUT INTESCO RESEARCH GROUP

INFORMATION 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



и многие другие

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