информационное агентство | information agency

In 2007 the analytical materials of INFOLine information agency were worthily appraised by the leading European companies. INFOLine agency was admitted to ESOMAR, the consolidated association of consulting and marketing agencies of the world. According to the regulations of the association, all materials of INFOLine agency are certified according to Eurostandards; this insures the quality of materials received by our customers and availability of aftersale services through additional consulting on customers' request.

DIY Market of Russia

The results of 2013, Forecast till 2017

Report

Brief version

- Main trends of the DIY market in Russia in 2010-2013 its development prospects till 2017
- Rating of the major retail and wholesale-retail DIY operators of Russia
- Rating of specialized DIY chains
- Description of the main DIY market formats (hypermarket, construction wholesaler, specialized shopping centre), development of online DIY retailing
- Comparative analysis of 75 regions of Russia
- Conditions of construction industry and residential construction in Russia
- Business reference data on 55 larges retail and wholesale-retail DIY operators

Contents

About the report "DIY market of Russia. The results of 2013. Forecast till 2017" (Standard version)

In 2013 Russian market of household goods and products for repair demonstrated minimal since 2005 growth rate: only 7,8%, against 17% in 2012. The market was growing mainly due to inflation, but real consumption in most of the segments and regions in the second half of 2013 stagnated. The degradation of DIY market's dynamics is mainly defined by reduction of growth rates of population's real incomes in 2013, and also by increase of debt burden of households, which in situation of growth of repayment and servicing of credits limited purchase of durable goods. As a result of reduction of market's growth rates and strengthening of competition from international retailers (first of all Leroy Merlin) most of Russian retailers demonstrated not only negative traffic indicators but almost zero or even negative indicators of comparable sales. Continuing growth of rents led to the fact that some retailers left the market: for example federal chain of supermarkets Starik Hottabych by the end of I quarter of 2014 was shortened to two stores and such companies as Intekso (Saint-Petersburg), Armada (Krasnoyarsk) and some others went bankrupt or closed all their stores. International companies also faced the degradation of indicators: chain Castorama had growth of comparable rates (in stores working for more than a year) go from double-digit numbers in the beginning of the year to single-digit ones – in the end of it. At the same time the leader of Russian DIY market, Leroy Merlin chain activated its expansion by opening of 6 hypermarkets in one year and by enlarging the turnover more than 30% at like-for-like indicator of 12%, and it also announced the extension of the chain by 2020 for more than 100 stores. Thereby in the nearest future the opening of new hypermarkets by Leroy Merlin will be the great challenge for Russian DIY retailers, present at the markets of big Russian cities.

Because of the fact that negative trends in economy of Russia in 2014 continue to strengthen, IA INFOline specialists don't expect growth rates of DIY retail commodity turnover to be more than 6-7%, and the market growth driver in terms of money will be the price revision for imported goods that happened in I quarter of 2014 due to ruble devaluation. Meanwhile the sales in physical terms in most of regions and commodity groups will shrink (especially in II half of 2014 due to the degradation of economical situation and influence of Federal Law "About consumer lending" which will lead to tightening of procedure of consumer lending and therefore reduction of consumer lending in Russia).

In **the report** **"DIY market of Russia. The results of 2013. Forecast till 2017"** the development of DIY market is characterized including forecast till 2017. There is also a comparable analysis and structured description of the largest DIY market players. In the report IA INFOline's analytics characterized the main trends of Russian DIY market development, composed the rating TOP-50 largest DIY operators of Russia by the results of 2013, which includes the indicators of net revenue, revenue by square meter of space, amount of commercial objects and aggregate commercial space by 01.01.2014. In the report there is also dynamics of development of organized retail and wholesale-retail formats at DIY market of Russia is described, the major players of formats like hypermarket, construction wholesaler and specialized shopping center are described, information about distributive centers of the largest DIY chains of Russia is presented, information about consumer preferences of Russians in relation to construction goods is presented.

The main goal of **the report** **" DIY market of Russia. The results of 2013. Forecast till 2017"** – to satisfy the needs of the market participators (suppliers and retailers) in operational, statistical and analytical information about Russian wholesale-retail DIY market and its operators.

The report **" DIY market of Russia. The results of 2013. Forecast till 2017"** includes the following sections:

- **Situation at DIY retail market**, where the history of DIY market's development is presented along with its present condition, there are also trends and perspectives of its development outlined, as well as the information on consumer preferences;
- **Rating DIY RETAIL RUSSIA TOP,** which includes characteristics of assortment of the largest retail and wholesale-retail DIY operators; rating DIY RETAIL RUSSIA TOP 50; ratings of the largest retail and wholesale-retail DIY operators of Russia by revenue for 2013, revenue from a square meter of commercial/reduced area, dynamics of stores number and commercial spaces of retail and wholesale-retail DIY operators;
- **Current condition and development perspectives of DIY market formats in Russia,** which presents general characteristics of the main formats, developed by Russian DIY chains, history of development and key peculiarities of such formats as hypermarket, construction wholesaler, specialized shopping center; characteristics of distribution centers of the largest DIY operators;
- **Condition of construction industry of Russia**, which includes the main macro economical indicators of construction industry, dynamics of investment in fixed assets, indicators of business activity of construction companies, main indicators of construction companies' activities, rating of companies in residential construction segment, condition of mortgage credit lending market, dynamics of housing prices, condition of uninhabited premises construction market, analysis of investment activity in building of commercial objects and in industrial construction;
- **Business references of TOP-30 DIY operators of Russia** (Leroy Merlin East, Ltd. / Commercial chain Leroy Merlin; OBI Russia / Commercial chain OBI; Castorama Rus, Ltd. / Commercial chain Castorama; STD Petrovich, Ltd. / Commercial chains Petrovich, Uroven; Maksidom, Ltd. / Commercial chain Maksidom; Stroyformat Ltd., (Corporation SBR, Ltd.) / Commercial chain Metrika; Poca, Ltd. / Commercial chains Stroitelny Dvor, Teplootdacha, Polovik; K-rauta Rus, Ltd. / Commercial chain K-rauta; Trest SKM, GK / Commercial chains SuperStroy, StroyArsenal; Baucenter Rus, Ltd. (GK Baucenter) / Commercial chain Baucenter; Saturn, CJSC / Commercial chain SaturnStroyMarket; AksonHolding, CJSC / Commercial chain Akson; Managing company Start,

CJSC / Commercial chains Start, Domovoy; Agava, Ltd. / Commercial chains Agava, MEGASTROY; HK Domocentr, Ltd. / Commercial chains DomoCentr, Prorab, Praktik, Stroykin, Abris, Forma; KPK Stavropolstroyoptorg, CJSC (GK Stavropolstroyoptorg) / Commercial chain Stavropolstroyoptorg; Perspektiva, Ltd. / Commercial chain Stroylandia (erlier Evrostil); Kroteks, CJSC (GK Krokus) / Commercial chain Tvoy Dom; StroyDepo, CJSC (GK Neks) / Commercial chain StroyDepo; SH Treiding, Ltd. (GK Neks) / Commercial chain Starik Hottabych; Company Kolorlon, Ltd. / Commercial chain VTD&Kolorlon; Vimos, Ltd. / Commercial chain TD Vimos; Evrostroy, Ltd. / Commercial chain Evrostroy; ETK, Ltd. (GK Elko) / Commercial chains Elko, ElkoMegaStore, Dobrostroy, Maksimum and others.; M 2, Ltd. (GK Praktika) / Commercial chains Praktika, Formula M2, Stroitelny Terminal; Optoviy Centr, Ltd. / Commercial chains Kenguru, Planeta and others; Stroy Park-R, Ltd. / Commercial chain Stroypark; Home Centers, Ltd. / Commercial chain Home Center; TD Centralnaya Stroybasa Karelii, Ltd. / Commercial chain CSK; Kurs-Logistika, Ltd. (GK Stroygigant) / Commercial chains Стройгигант, База Строитель, Панорама; Мой Дом, LTD. / Commercial chains Мой дом, Azbuka Remonta. **Business references include:** *contacts, TOP-management, history of the chain's development, the structure of the chain and its stock capital, operational indicators, format indicators, financial indicators, regional representation, distributive centers, own brands, perspectives of development.*

While doing research for **the report "DIY market of Russia. The results of 2013. Forecast till 2017"** specialists of IA INFOLine used the following sources:

- Expert surveys and interviews with commercial chains' representatives, survey of more than 200 chains;
- Commercial chains' materials (primary documents, press-releases, materials from the sites, reports);
- Records of financial reporting of commercial chains according to Russian and international standards;
- Service "Thematic news: Commercial chains DIY" and archive since 2001 on topic of "Commercial chains".

Consumers of **the report "DIY market of Russia. The results of 2013. Forecast till 2017"** are:

- Top-management, departments of marketing, development and sales of companies, that present DIY goods;
- Top-management, departments of marketing and development of DIY chains;
- Top-management, planning and customer service departments of banks, financial and IT-companies.

Facts about INFOLine Information Agency

INFOLine information agency was established in 1999, its aim was to render information and advisory services to commercial organizations. The agency renders permanent information support to more than 1000 companies in Russia and world-wide. On daily basis INFOLine IA monitors publications in more than 5 000 MSM and carries out analytical research according to 80 subjects of the RF economy. Since 2003 INFOLine IA has been conducting various desk researches of the markets both on the customer's request and on the Agency's own initiative. When working on a market research, the Agency's analysts make extensive use of their unique data support and their years-long experience in various data flows operating. Research materials of INFOLine IA are used in their activities by **the largest DIY retailers** (Leroy Merlin, Castorama, Metrika, Start, Akson and others), **manufacturers** (KNAUF, ISOVER, Henkel, Bosch, Litokol and other), **financial** (Sberbank JSC, Alfa-bank, VTB) and **service** companies (SAP, GC Service-Plus, Wincor-nixdorf and other).

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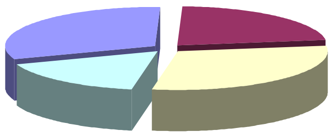
"For more than 10 years INFOLine IA has been in engaged into monitoring of the construction industry, the industry of construction materials production and DIY retail. The specialists of INFOLine have issued a major study of ***DIY&Household Market of Russia****, which proved to be popular and of demand among retail chains, producers and suppliers of construction materials as well. We energetically participate in preparation and realization of business conferences devoted to DIY and Home Improvement markets, problems of construction industry development, and we invite you to become a part of them."*

Ivan Fedyakov,
CEO of INFOLine IA

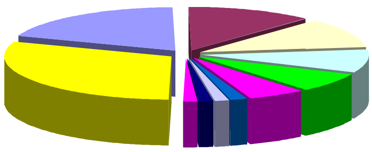
Conditions of DIY market in Europe and Russia

The world DIY market's capacity exceeds *** bln Euros. Notably, about * bln Euros fall on the North America, about * bln Euros – on *** and not less than * bln Euros – on ***. The structure of the world DIY market by regions is presented at the diagrams.

Structure of world DIY market by regions, %



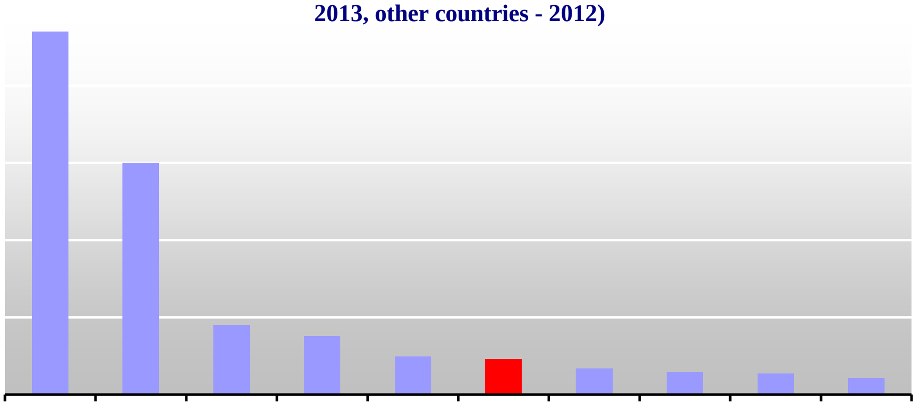
Structure of European DIY market by regions, %



The major DIY markets are markets of ***, ***, ***, ***, ***, *** and *****.** Their aggregate share comes to about ***% of the world DIY retail turnover. **In Russia in 2013 DIY retail turnover came to *** bln Euros**[1] (in 2012 – *** bln US dollars.). Rating of the countries by their DIY retail turnover according to results of 2012 is presented at the diagram.

DIY market of Russia is the 6th largest in the world and the 3d largest in Europe

Rating of countries by turnover of DIY retail, bln Euros (Russia - 2013, other countries - 2012)

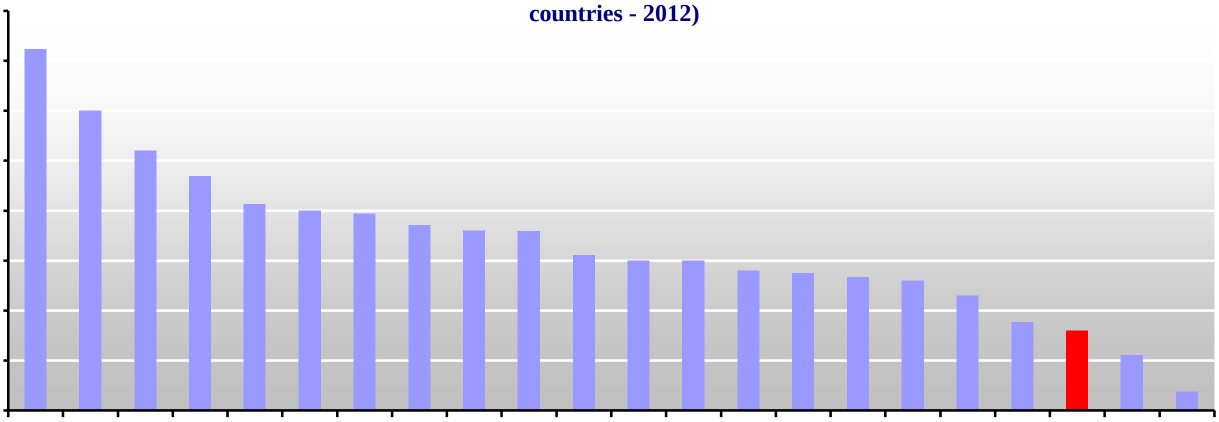


***** Demo-version. The full text is contained in the Research *****

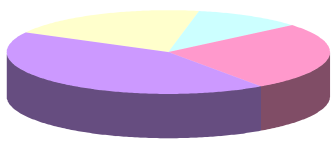
[1] Here and further on the data do not account for Republic of Crimea.

In terms of per capita DIY retail turnover, **Russia** falls behind the developed countries. This determines a significant potential of Russian DIY market. **In Russia retail turnover continues to grow by ***% annually in mass of commodities terms and ***% in money terms (with account of inflation).** The volumes of residential construction and DIY market's growth rates are still high in 2013 – ***% in roubles and ***% in Euros ***%. According to analysts of INFOLine, Russia is to retain the DIY retail market turnover at the level of 2013 in 2014-2015.

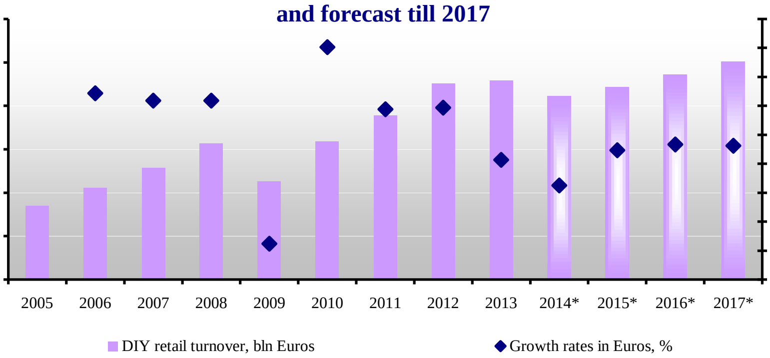
Per capita DIY retail turnover by countries, Euros annually per a person (Russia - 2013, other countries - 2012)



In 2010-2012 DIY market demonstrated high development rates due to residential construction growth and other beneficial factors. In 2013 the market's growth rates in Euros decreased to ***%. This was connected with instability of the rouble's exchange rate in relation to the Euro, in roubles the market's growth came to ***%. The dynamics of DIY retail turnover in Russia in 2005-2013, the forecast till 2017 and DIY market's structure by retail segments: Hard-DIY, Soft-DIY[2], Household and Garden in 2013 are presented on the diagrams.



Dynamics of DIY retail turnover in the RF in 2005-2013 and forecast till 2017



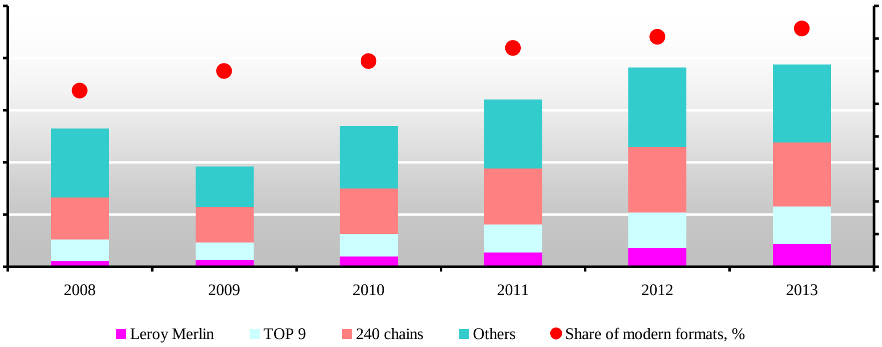
In Russia the chain retail accounts for more than ***% of DIY market. INFOLine agency has a data base of 400 largest DIY chains. The dynamics of retail DIY chains in Russia in 2008-2013 are presented on the diagram.

*** Demo-version. The full text is contained in the Research ***

[22] The sector of Hard DIY comprises chains mainly operating on B2B in the format of "stroybaza" (a construction materials wholesaler yard) and/or with open construction yards among their facilities. This allows them to sell materials for construction, capital repair and rough finishing. The group of Soft DIY consists of B2C businesses, selling home improvement and repair goods, as well as HH and interior decoration goods.

The share of international chains at DIY market in Russia is >%***

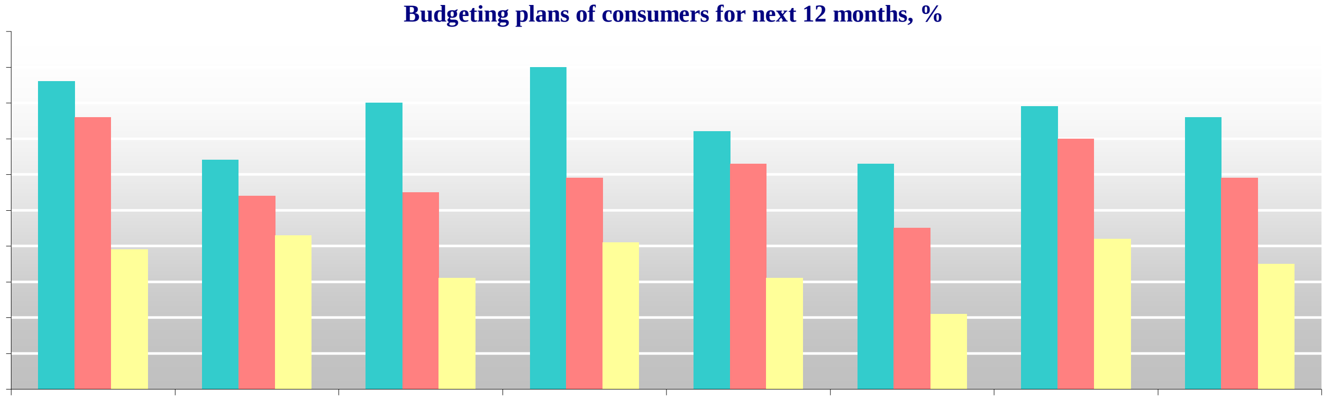
Share of retail chain on DIY market in Russia in 2008-2013



One Russia's specificity is more than * bln Euros of free cash accumulated by the population**, while the debt load, though growing fast, still remains considerably lower – at the level of ***** bln Euros.** While the population's income is decreasing, as well as the growth rates of salaries and wages, it does not substantially influence the consumption of goods and services in the DIY segment. In other words, "middle class" consumers are not ready to reduce consumption in the DIY segment, even though they feel not so confident in connection with worsening macroeconomic indicators. Meanwhile, such activities as home improvement and repair, out-of-town housebuilding, interior decoration, garden improvement **have remained the most significant expenditure item for Russian family budgets for more than three years** (significantly higher than buying a car, travelling, education etc.).

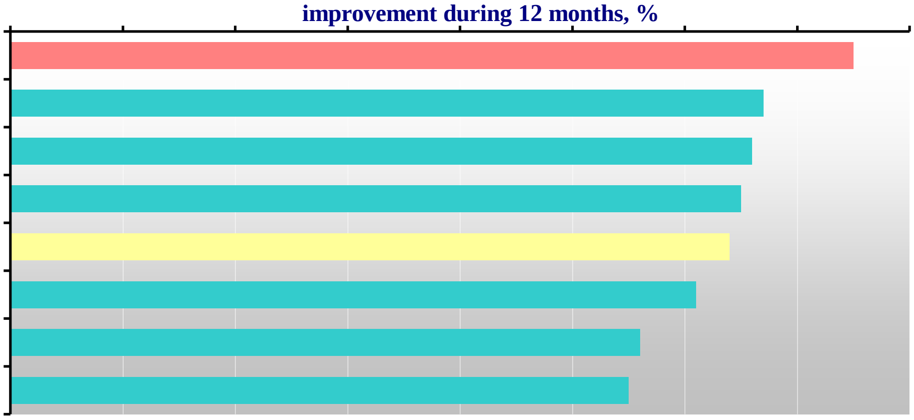
In Russia the index of planned repair is much higher than the average European one. It comes to ***%, while the number of respondents that intend to go on vacation is the same as the average for Europe.

Budgeting plans of consumers for next 12 months, %



Furthermore, despite the signs of stagnation or recession among the European economies, ***% of respondents have plans to spend the same or even larger sums on home improvement during next 12 months. The Russian are even more inclined to increase their home improvement expenditures – ***% of households plan to do it.

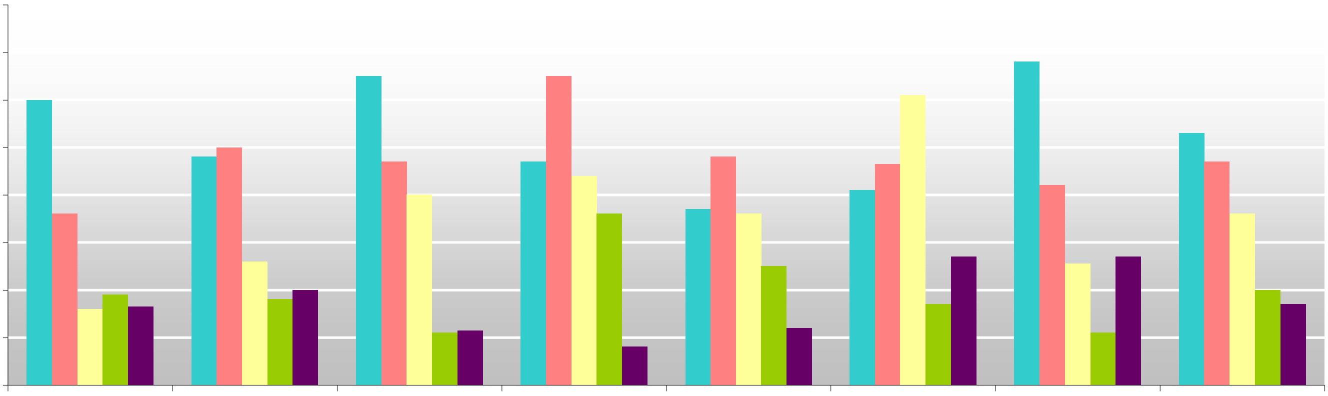
Consumers planning to spend the same or greater sum on home improvement during 12 months, %



***** Demo-version. The full text is contained in the Research *****

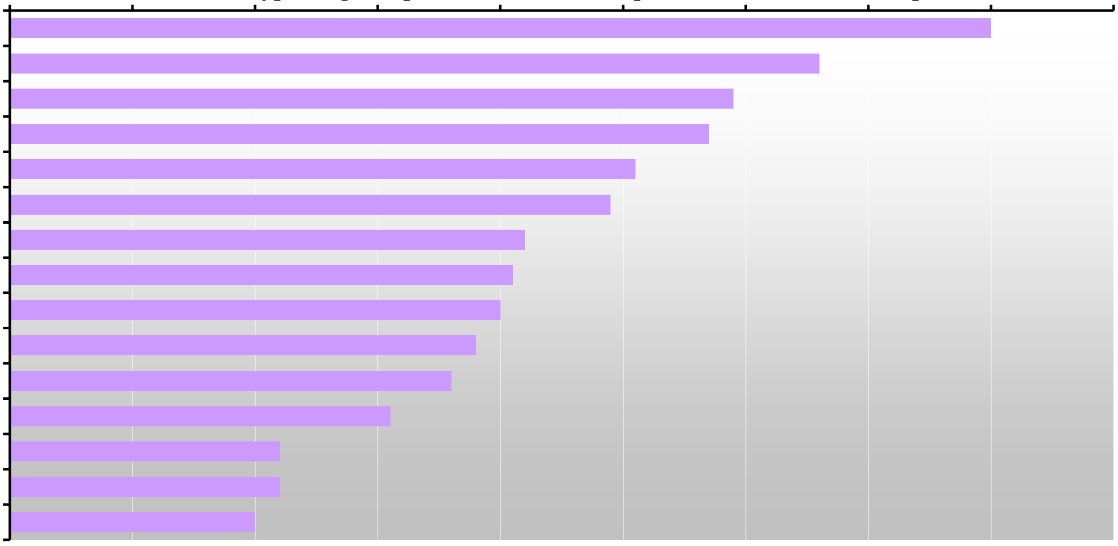
Russia is also the leader in the motivation category of "Repair as an alternative to relocation". This index comes to ***%. For comparison, in Spain, the country in the second position by this motivation, this indicator reaches just ***%. Turkey and Germany have the highest percentage (***%) of households that do home repair to increase the value of their real estate property. In Russia this indicator is the lowest in Europe and reaches just ***% (due to absence of correspondence between the property's value and the quality of repair in practically all market segments, except for elite property).

Main motivation for home repair during next 12 months, %



The most popular DIY goods purchased by Russians are wallpaper (***%) and corresponding glues, joint sealers and sealing foams (***%), as well as other materials for inside surfaces – plaster and filling mixtures (***%), paintwork and coating materials (***%).

Types of goods purchased for home repair, % of those who did repair



***** Demo-version. The full text is contained in the Research *****

Rating of the largest DIY retailers of Europe and Russia

In Russia TOP 10 players account for more than ***% of the DIY market. The absolute leader of the Russian DIY market is Leroy Merlin chain – more than ***% of the market and revenue of more than *** bln Euros in 2013. The net revenue of the 10 largest retailers at the Russian DIY market according to results of 2013 is presented in the table.

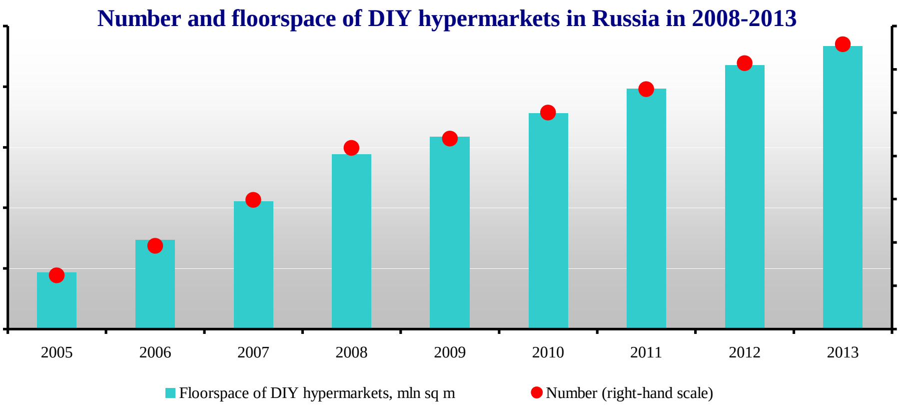
Rating of TOP 10 retailers of Russia in terms of revenue[3] according to results of 2013

No.	Company's name	Brand	Revenue excluding VAT, mln Euros					Dynamics, %			
			2009	2010	2011	2012	2013	2010/ 2009	2011/ 2010	2012/ 2011	2013/ 2012
1	Leroy Merlin Vostok, LLC	Leroy Merlin	*	*	*	*	*	*	*	*	*
2	ОБИ Russia	OBI	*	*	*	*	*	*	*	*	*
3	Castorama Rus, LLC	Castorama	*	*	*	*	*	*	*	*	*
4	STD Petrovich, LLC	Petrovich, Uroven	*	*	*	*	*	*	*	*	*
5	Maksidom, LLC	Maksidom	*	*	*	*	*	*	*	*	*
6	Stroyformat, LLC	Metrika	*	*	*	*	*	*	*	*	*
7	Rosa, LLC	Stroitelniy Dvor, Teplootdacha, Polovik	*	*	*	*	*	*	*	*	*
8	K-Rauta Rus, LLC	K-Rauta	*	*	*	*	*	*	*	*	*
9	Arsenal Trade, LLC	SuperStroy, StroyArsenal	*	*	*	*	*	*	*	*	*
10	Baucenter Rus, LLC	Baucenter	*	*	*	*	*	*	*	*	*

Data source: *Companies' data, assessment and calculations of INFOLine IA*

A characteristic feature of the Russian DIY market is the fact that among the three leading companies there are international chains only: Leroy Merlin, OBI and Castorama. The positions of TOP 10 players of the DIY market in Russia are presented in the diagram (international companies are marked with red, Russian players – with yellow; Y-axis demonstrates revenue growth in 2013, the sphere's size shows net revenue of the company).

Before 2013 the leading positions in terms of total selling/gross floorspace belonged to Leroy Merlin (1st position), OBI (2nd position) and Castorama (3d position). In 2013 the federal chain Metrika took the 3d position, incrementing its gross floorspace by more than *** ths sq m (+***%), outrunning Castorama, which in 2013 opened just one hypermarket in *** with selling space of *** ths sq m. As of 01 May 2014 international companies have *** operative DIY hypermarkets in Russia. Development of the DIY hypermarket segment in Russia is presented in the diagram

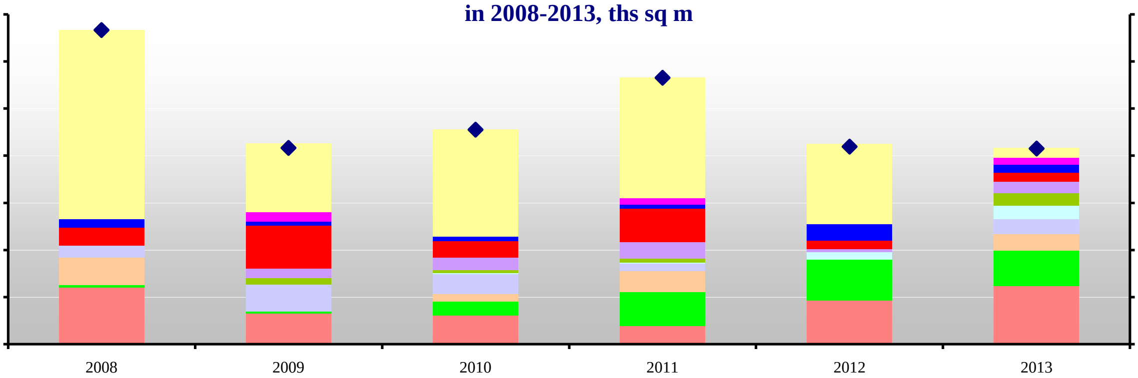


In terms of selling floorspace growth the first position in 2013 belongs to the international chain Leroy Merlin – it opened *** hypermarkets. The second position is taken by the Russian chain Metrika; it increased its number of outlets by ***. Trest SKM is in the third position (commissioned *** hypermarkets), OBI is the fourth (commissioned 1 hypermarket).

***** Demo-version. The full text is contained in the Research *****

[3] When preparing the Rating of DIY Retail TOP 50 we considered only DIY revenue.

Dynamics of selling/gross floorspace growth among 50 major DIY operators in Russia in 2008-2013, ths sq m



In 2013 the chains located in the middle of the ranking (from 11th to 50th position) sharply reduced their share in the total growth of selling/gross floorspace among TOP 50 operators of the DIY market in Russia. The market leaders, their aggressive investment policy, are pushing regional players out of the market. Regional companies have fewer opportunities and are forced to either just try or maintain the number of stores in the chain or even close up unprofitable outlets.

International DIY chains in Russia

In total there are 5 international DIY retailers present in the territory of Russia and the chain of furniture and household goods IKEA. The characteristics of the international DIY market's players in Russia are presented in the table.

***** Demo-version. The full text is contained in the Research *****

Characteristics of international DIY market's players of Russia

Year of Russian market's entry	Country	Brand	Logo	Number of hypermarkets as of 01 May 2014	Total selling floor space as of 01 May 2014, sq. m	Range of selling floorspace, sq. m	Number of regions where the chain is present
2000	Sweden	IKEA		*	*	*	*
2003	Germany	OBI		*	*	*	*
2004	France	Leroy Merlin		*	*	*	*
2005	Finland	K-Rauta		*	*	*	*
2006	Great Britain	Castorama		*	*	*	*
2007	Israel	HomeCenter		*	*	*	*

Data source: Companies' data, assessment and calculations of INFOLine IA

According to results of 2013, international companies account for more than ***% of the Russian DIY market. Net revenue dynamics of international companies on the DIY market of Russia are presented in the diagram.

***** Demo-version. The full text is contained in the Research *****

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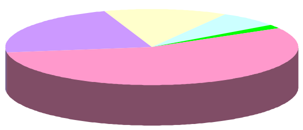
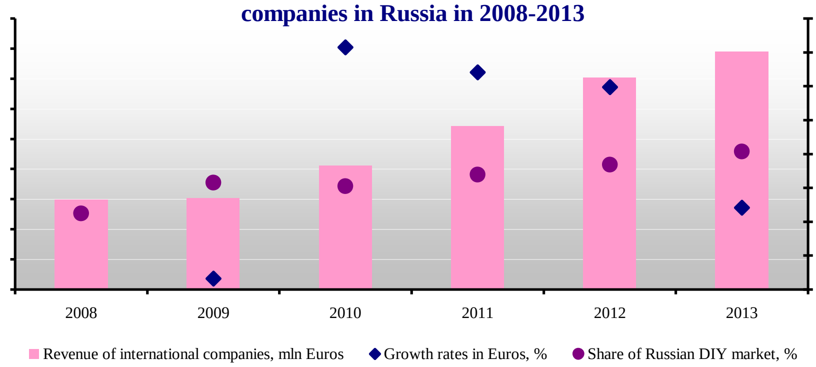
Structure of aggregate revenue of international companies in Russia in 2013, %



Dynamics of aggregate net revenue of international DIY companies in Russia in 2008-2013



Furthermore, the Russian divisions of some international players account for a considerable share of the parent company's turnover and are more profitable than its businesses in the majority of other European countries. For instance, Leroy Merlin’s revenue in Russia comes to more than ***% of the total turnover of Adeo GC.

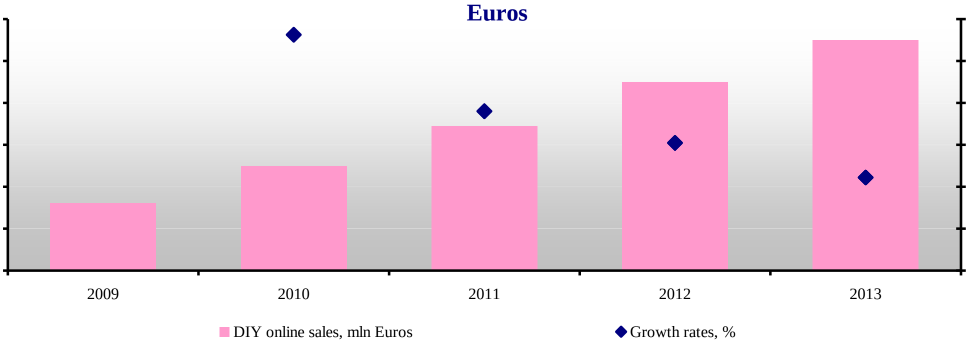
Development of online retailing at the DIY market of Russia

The e-commerce market in Russia is at the stage of development and has good perspectives for growth. **According to various assessments, the total money turnover of the online retailing in Russia increased by ***% in 2013 (to *** bln Euros).** Meanwhile, the share of online sales in Russia is several times lower that in other countries with large retail markets. According to results of 2013 it came to ***% of the total retail turnover (in 2012 – ***%).

The first online stores were opened by local DIY chains in 2007-2008. The largest number of opened online facilities falls on 2012, when they doubled their number (from *** to ***). In 2013 online DIY retailing continued its development, though its growth rates in terms of stores’ number significantly lowered. During 2013 only about *** online stores were launched into operation. Mostly it was local companies but international chains, though keeping a little aside from the online retailing trend, also began to increment their online presence. For instance, online stores were opened by Leroy Merlin (www. leroymerlin. ru/estore/), the leader of the Russian DIY market and Home Center (www.homecenters.ru). In 2014 OBI began to develop this channel. The INFOLine’s assessment of the online stores’ opening dynamics is presented in the diagram.

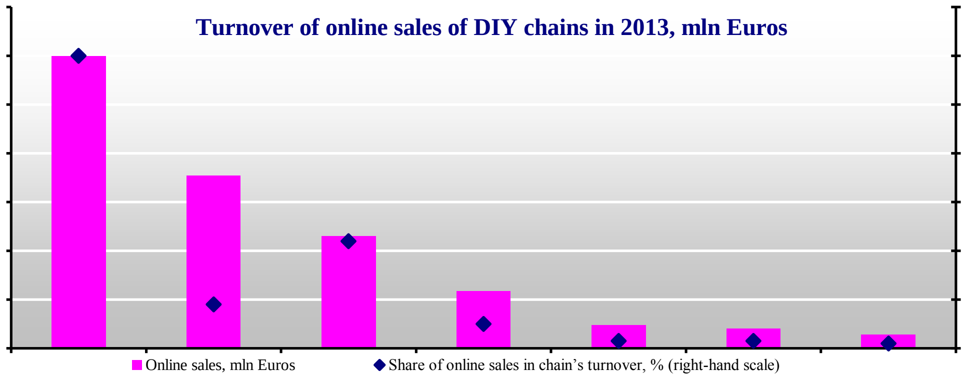
In 2013 online sales in DIY segment increased by ***% in roubles and reached *** bln rbl (1100 mln Euros), in Euros the growth came to ***%. Dynamics of online sales in DIY segment in Russia in 2008-2013 are presented in the diagram.

Dynamics of online sales in DIY segment of Russia in 2008-2013, mln Euros



***** Demo-version. The full text is contained in the Research *****

STD Petrovich is the largest player on the market of online retailing among the general DIY chains – in 2013 the share of company's online sales came to ***%. In 2014 the operator plans to bring the online retailing's share to ***%. Trest SKM GC increased its online retailing share from ***% in 2012 to ***% in 2013. Also major specialized DIY chains are actively developing online retail. For instance, online stores of such chains as Vse Instrumenty.ru and 220 Volt are among TOP 20 online stores of Russia. The share of online sales of Vse Instrumenty company reaches about ***% of its turnover. The turnover of online sales of the largest chains in 2013 is presented in the diagram.



Further development of online DIY retailing will result in significant growth of online sales in the structure of the chains' revenue. Furthermore, those retailers that started their e-commerce development in 2014-2015 will continue with optimization of profitability and efficiency of their online stores to make use of advantages of online and multichannel retail.

***** Demo-version. The full text is contained in the Research *****

Information products of INFOLine:

INFOLine agency is an independent company that has been operating at the Russian market of research reports since 2001. The research report projects of the construction market conditions and FMCG, DIY and Household retail of Russia that have been performed by the specialists of INFOLine are recognized to be the best on the market, and this has been acknowledged by many of its customers and partners, among which there are major retailers, international and Russian producers and suppliers.

Especially for construction industry companies, as well as suppliers and retailers operating on the market of home improvement, repair and HH goods, the specialist of INFOLine have introduced a number of information products:

INDEPENDENT RESEARCH REPORTS RELATED to DIY

NEW! DIY Market, Results of 2013 and Forecast till 2017

The Report contains the following data:

- Rating of the largest retail and wholesale-retail DIY chains by their financial efficiency (gross margin and net profit margin) and the average purchase size; by selling/gross floorspace, number of stores (as of 01.01.2014), revenue per one square meter of selling/gross floorspace
- Development of online retailing on the DIY market; regional development of the largest DIY operators; business reference data on TOP 50 DIY operators; prospects for development of the largest players on the DIY market
- NEW! *Description of TOP 50 players on the DIY market; debt load; development strategy; preferences of DIY consumers in Russia; description of the largest players among "specialized chains".*

Publication date	**March 2014**
Price	**1 000 Euro**

Возможность предоставления английской версии

NEW! Analytical data base of DIY retail chains

It contains operational and financial indicators, as well as contacts of TOP managers for 250 DIY retail chains of Russia: Legal name; Brand; Management **NEW!** *Development director, marketing director*; Actual address; Phone; Fax; E-mail; Web-site; Formats; Total number of the chain's stores as of 01 January 2014; Selling/gross floorspace; Revenue (excluding VAT) in 2011-2013, bln rbl; Presence in regions; Number of DCs as of 01 January 2014.

INDEPENDENT RESEARCH REPORTS RELATED to CONSTRUCTION INDUSTRY

Designation	Contents	Publication date	Price, Euro
NEW! Construction Industry of Russia: housing, commercial, infrastructure construction	Macroeconomic indicators and conditions of the main industry's segments. Results of 2013. Construction industry, rating and business reference data by companies: housing, road and infrastructure construction, commercial-administrative construction.	March 2014	Starting from 800
HIT of SALES! Structural Steel Market of Russia Results of 2013 Forecast till 2016	Analysis of structural steel production and consumption, description of 60 largest enterprises and holdings, data base of 330 producers of structural steel and metalware	March 2014	Starting from 1000
Sandwich Panels Market of Russia. Results of 2013 and Forecast till 2016."	Deeply retrospective analysis of dynamics of production capacities, as well as production and consumption of sandwich panels beginning from 2004, forecast for production and consumption of sandwich-panels till 2015	March 2014	Starting from 1000
Production and Consumption of Crushed Stone in Russia. Results of 2012 and Forecast till 2015	Analysis of dynamic and geographical structure of production and consumption of aggregates and crushed stone in particular in the territory of Russia; description of the current investment climate at this market, survey of equipment for production of aggregates present at the Russian market; analysis of volume and description of the largest deposits of construction aggregate materials	November 2013	1200

INVESTMENT PROJECTS IN CONSTRUCTION

The description of each facility includes updated relevant contact information about the project's participants (developer, investor, constructor and supplier). The major part of the described projects is at the initial stage of construction. Every month you will be able to receive an actualised description of **more than 500 projects being implemented**.

Product's name	Periodicity	Price, Euro per month
Investment Projects in **CIVIL** Construction of the **RF**	Twice a month	250
Investment Projects in **INDUSTRIAL** Construction of the **RF**	Twice a month	250
Investment projects in **TRANSPORTATION** Infrastructure of the **RF**	Once a month	250
Investment projects in **ENGINEERING** infrastructure of the **RF**	Once a month	250

INDUSTRY DATA BASES OF FACILITIES UNDER CONSTRUCTION

Industry data base of investment projects is an information product in the context of which the specialists of INFOLine prepare structured description of investment projects related to construction and reconstruction in a certain individual industry branch, with indication of contact data of the developer, general contractor and other project's participants, as well as description of the branch's condition.

Product's name	Publication date	Price, Euro
• **180** Construction Projects of **Hotel** Facilities, Projects of 2014-2017	March 2014	Starting from 800
• **180** Construction Projects of **Retail** Facilities, Projects of 2014-2016	November 2013	500
Warehousing real estate market of Moscow region. Trends of 2013-2015	February 2014	500

INDUSTRY NEWS

Industry News is the service that provides immediate and periodical information about segments of the RF economics you are interested in. It has been prepared by monitoring activity of Russian and foreign companies, thousands of business and branch mass media sources, information agencies, federal ministries and local governments

Subject	Periodicity	Price, Euro per month
HH and DIY Retail Chains	Once a week	100
Home Improvement Materials Market and HH Chains	Once a week	120
Commercial and Administrative Construction in the RF	Daily	120
Industrial Construction in the RF	Daily	120
Housing construction in RF	Daily	120
Road Construction in RF	Daily	120
Paintwork Materials Market	Once a week	100
Thermal Insulating Materials Market	Once a week	100
Tiles and Ceramic Granite Market	Once a week	120
Bricks Market	Twice a month	100

INDEPENDENT RESEARCH REPORTS RELATED to RETAIL

Name	Contents	Issue date	Price, Euro
NEW! **INFOLine Retail Russia TOP 100, Results of 2013**	The Report contains statistics and analytical data on development of retail chains in Russia. It also presents: dynamics of the key performance indicators of retail in RF, dynamics of key indexes for TOP 100 in general, market surveys of FMCG, home appliances and electronics, DIY and Household, mobile devices, perfumery and cosmetics, fashion and children's products	May 2014	3000
NEW! **FMCG Hypermarkets Segment in Russia, Results of 2013 and Forecast till 2016**	The Report present analysis of the macroeconomic conditions of the FMCG retail market of Russia, business reference data on 70 retailers, overall analysis of the hypermarkets market in 27 cities and regions of Russia. It also includes analysis of the hypermarkets segment in more than 240 cities (with population above 50 ths people) in 6 federal districts of the RF (excluding the Far East FD) and 27 regions of the Report, description of more than730 operating hypermarkets	May 2014	Starting from 800
HIT of SALES! **Analytical Database of 600 FMCG retail chains of the RF**	It contains the following sections: Conditions of the FMCG retail market in Russia; Business reference data on TOP 70 retailers; Data base of 600 chains and 500 DCs that includes the following entries: The retail chain's operator, Brands, Contacts, Management (CEO, procurement director, financial director, IT director), Total number of stores, Total selling space, Revenue, Presence in regions, Number of distribution centres	September 2013	1000

Please, take note! *The above-mentioned selection of our products is not complete.*
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