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WATER HEATER MARKET RUSSIA 2004-2007

Multi-client research

Moscow, July 2008

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1. METHODOLOGY

1.1 INFORMATION SOURCES

The study was performed on the basis of the following information sources:

- **CUSTOMS DECLARATION ANALYSIS**

The information obtained as a result of the customs declaration analysis becomes more reliable from year to year. To find out the market trends, its key tendencies, and the main players there was made the detailed analysis of the front pages of customs declarations for 2004-2007. Starting from 2007 we got a possibility to get information contained in the extra pages of customs declarations. This made the obtained information more reliable and allowed us to identify water heaters by models more accurately.

In 2007 it became possible to identify more than 95% of water heaters by models. To estimate sales volume of a number of local companies one can also use the data obtained from the customs declaration analysis as many of them use import parts for making water heaters. So, for example, Real, De Luxe, Oka, Ariston, Elenberg and DeLonghi water heaters are manufactured on the basis of various parts (such as tanks, thermostats, magnesium anodes, electric heaters and etc.) made by Thermowatt Company, a member of MTS Group.

It was a bit more difficult to get information on the indirect cylinders of some brands, as a number of them were imported as spare parts to boiler plants and, therefore, information on the units of this type was contained in the additional pages of customs declarations. That is why the data on Viessmann for the period from 2004 to 2006 and Reflex – from 2005 to 2006 were obtained from these companies' representatives. There was also misdescription of instantaneous gas water heaters that were stated in customs declarations as indirect cylinders (AEG/Electrolux, Mora, Junkers brands)

Under a lack of information from local manufacturers their product identification by models was made on the basis of their export analysis.

- **GOSCOMSTAT DATA**

The information on output volume of the biggest local manufacturers was obtained from Goscomstat. This allowed us to define more exactly the preliminarily data obtained from the customs declarations analysis. In a number of cases Goscomstat was an only source of information. When analyzing the information on "Gasapparat", the biggest manufacturer of instantaneous gas water heaters and boilers, (Neva and Nevalux brands, as well as the former Neva) there were taken into account the annual reports published on the companies' official web-site.

- **INTERVIEWS WITH MANUFACTURERS AND EQUIPMENT SUPPLIERS**

Whatever customs information is correct, it should be completed with the data obtained from the equipment distributors and manufacturers. In the course of this report preparation there were conducted interviews with many Russian manufacturers and big suppliers of foreign equipment.

TABLE 1. Information sources

	Russian manufacturers	Foreign manufacturers' representatives	Distributors	Total
Interviews	6	9	12	27

1.2 TERMINOLOGY

Water heater is a unit intended for water heating in hot water supply system.

Water heaters are classified as follows:

1) **By heating method**, these are **instantaneous** and **storage-type** water heaters. The key feature of storage-type water heaters is their tank capacity. In most cases the power feature of this type water heater is not very important. Unlike storage-type water heaters the key feature of instantaneous water heaters is their power as they heat water to the required temperature when it is coming through a heating element.

By energy sources used for heating there are six main types of water heaters: **electric, gas, indirect or combination, solid fuel, solar** and **oil ones**. In practice the most frequently used ones are electric and gas water heaters in which water is heated by electricity and gas respectively. Indirect or combined water heaters will be put in one category in this report and called as "indirect cylinders". The units of this type heat water with the usage of a boiler and/or other heat source (solar panel, heat pump, CCU). Solid fuel and solar (hereafter are referred to as solar collectors) water heaters using solid fuel (firewood, coal, cuttings and etc.) and solar energy respectively are much less popular. As for oil water heaters using diesel oil or mazut as a heat source, they are very rare in sale.

By water pipe-line connection type water heaters are divided into **open-type** and **pressure-type** units. Open-type water heaters are connected to free-flow pipe lines and may be used only with a single water-supply point (kitchen sink, washstand etc.). Their principle of operation is based on the following. While entering a water tank cold water due to its smaller density displaces hot water and pushes it directly to a water plug. Pressure-type units are installed into cold water lines and may be used for serving multiple water-supply points (bath-room, shower-room etc.). Water pressure within a tank is supported at a constant level corresponded to the water line pressure. Normally, this type of equipment is fitted with a special safety group not allowing overpressuring in accordance with set up range values.

According to the presented classification there are the following water heater types:

a) Electric storage water heaters

Electric storage water heaters are divided into **wall-type** and **floor-standing** types (the last ones are models of higher capacities). Water heater tank can be made of **enameling steel** or with **glass-ceramic coatings, stainless steel, polypropylene, plastic** and **copper**. By structure, **horizontal** and **vertical** versions are available.

b) Electric instantaneous water heaters



Figure 1. Electric vertical storage-type water heater



Figure 2. Electric horizontal storage-type water heater



Figure 3. Electric plastic-side storage-type water heater



Figure 4. Electric instantaneous water heater



Figure 5. Gas instantaneous water heater

There are **single-phase** and **three-phase** models.

c) Gas instantaneous water heaters

Gas instantaneous water heaters differ by the type of ignition. These are the models with **manual ignition with the use of matches**, **piezo-ignition** button or **electronic-ignition** automated system activated at cold water plug opening. They also differ by the type of used gas – **natural gas** or **liquid gas**.

d) Gas storage water heaters

This type heaters may use one of two combustion units - with **natural draft** (open combustion chamber) and with **forced draft** (closed combustion chamber).

e) Indirect cylinders

Indirect cylinders differ by the type of energy used. There are **indirect cylinders** and **combination water heaters** (with additional electric heaters). Indirect cylinders may be also differed by their design – “**tank within tank**” models and “**spiral heat exchanger**” models. “Tank within tank” technology means the use of two-tank indirect cylinder. An inner tank keeps water to be heated (secondary circuit) and an outside storage tank contains heated water (primary circuit). Spiral heat exchanger models heat water when it passes through a spiral coil installed within a water tank.

f) Solid fuel water heaters

g) Solar collectors

h) Oil water heaters



Figure 6. Gas storage-type water heater



Figure 7. Indirect cylinders



Figure 8. Solid fuel water heaters



Figure 9. Solar collectors c/w indirect cylinder



Figure 10. Oil water heaters

1.3 PRICES

All sales values given in the report are expressed in retail prices obtained from the main distributors' or the manufacturers' price lists. Under a lack of this information for some brands there were used average retail prices on the market. All the prices are estimated in rubles with the usage of mid-year USD exchange rates obtained from Rosstat.

TABLE 2. Rouble/USD Exchange Rates

2004	2005	2006	2007
28,81	28,29	27,24	25,49

Source: Goscomstat

If a safety group is optional the prices for electric storage-type water heaters are stated with no account of its cost. Prices for electric instantaneous and storage water heaters do not include the cost of a shower kit and a water tap if the latter ones are not a part of delivery set.

2. MARKET SIZE AND STRUCTURE

Bba Bbbbbab cabab baabbba abbbbbabb babbab babba bab bbba bbab abbabaa abb bba baaabb bbbba caabb. Bba bbaababa babab abbcbb bb 0000-0000 cab abbbbcaa ac 00,0% bbbbaa bb 0001. Ab a bbbbbb bba babbab baaabaa bba baabba babab babba abbbbabaa ab 00,10 abbbbbb bbabab. Abbbabbba bbbb abbcbb bb BBA bb cbbb aa abab bbabab – 00,1%. Bbbb aab aa abbbbabbaa bb bba aabb bb BBA/bbbaba acababaa babab aba ab bbabaaba bb aabab bbbaab (bbaba bbbaab baba bbabaabaa ac 0-1% ab bba ababaaa).

TABLE 3.1 Water heater market value, mln.rub

	2004		2005		2006		2007	
		%		%		%		%
Electric storage	0 001,0	00,1%	0 010,0	00,1%	0 010,0	01,0%	1 001,0	01,0%
Electric instantaneous	000,0	0,1%	000,0	0,0%	000,0	0,0%	010,0	0,0%
Gas instantaneous	0 001,0	01,0%	0 100,0	00,0%	0 101,0	00,0%	0 000,0	00,0%
Gas storage	11,0	0,0%	000,0	0,0%	000,0	0,0%	010,1	0,0%
Indirect cylinders	000,0	1,0%	110,1	1,0%	0 000,0	00,1%	0 010,1	1,1%
Other types	00,0	0,0%	00,0	0,0%	00,0	0,0%	01,0	0,0%
Total	1 100,1	000,0%	1 000,1	000,0%	00 000,0	000,0%	00 100,0	000,0%

Source: Litvinchuk Marketing Co.

TABLE 3.2 Water heater market value, mln. \$

	2004		2005		2006		2007	
		%		%		%		%
Electric storage	000,01	00,1%	011,10	00,1%	001,10	01,0%	010,00	01,0%
Electric instantaneous	00,01	0,1%	00,01	0,0%	00,10	0,0%	00,00	0,0%
Gas instantaneous	10,00	01,0%	11,01	00,0%	11,01	00,0%	000,01	00,0%
Gas storage	0,01	0,0%	0,10	0,0%	0,00	0,0%	1,01	0,0%
Indirect cylinders	01,01	1,0%	01,00	1,0%	00,00	00,1%	00,01	1,1%
Other types	0,10	0,0%	0,00	0,0%	0,00	0,0%	0,00	0,0%
Total	010,00	000,0%	001,00	000,0%	001,00	000,0%	000,00	000,0%

Source: Litvinchuk Marketing Co.

FIGURES 1. Russian water heater market, sales value 2004 – 2007



Source: Litvinchuk Marketing Co.

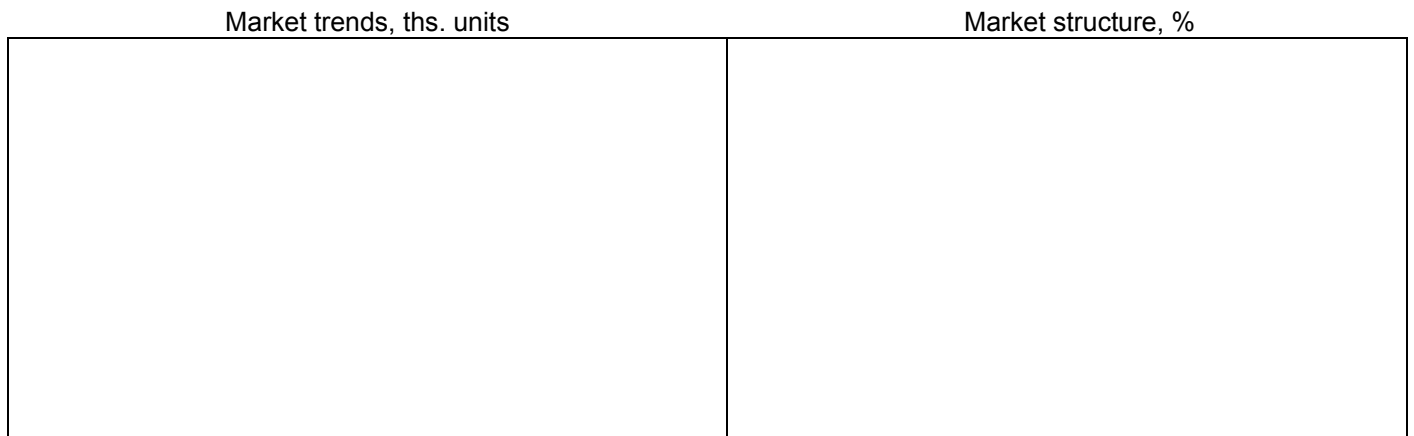
Ababba 0.0. bbbcb bbab bba babbab bbbbabba bab bbb bbaabbaabbc ababaaa. Bb bb bbbc cbbbb bbbbbbba bba bbabaabaa abbcbb ba abaabba bbbbaaa-bcba cabab baabab babab.

TABLE 4. Water heater market volume, ths. units

	2004		2005		2006		2007	
		%		%		%		%
Electric storage	100,1	00,0%	0001,1	01,0%	0010,0	00,1%	0111,0	00,0%
Electric instantaneous	000,0	00,0%	010,0	1,1%	001,0	00,0%	011,1	1,0%
Gas instantaneous	000,0	00,0%	000,1	00,1%	001,0	00,1%	100,1	01,1%
Gas storage	0,0	0,0%	1,1	0,0%	1,0	0,0%	00,0	0,0%
Indirect cylinders	01,0	0,0%	00,0	0,0%	00,1	0,0%	01,1	0,0%
Other types	0,0	0,0%	0,0	0,0%	0,0	0,0%	0,0	0,0%
Total	0 101,1	000,0%	0 100,0	000,0%	0 001,0	000,0%	0 010,0	000,0%

Source: Litvinchuk Marketing Co.

FIGURES 2. Russian water heater market, sales volume 2004-2007



Source: Litvinchuk Marketing Co.

Bb 0001 bba babbab babab bbbba bab bbabaabaa ac 00,0% aba acaaaaaa 0 bbb. bbbbb abb bba abbbb bbba bb bbb bbbbbb. Bba abaaabb abbcbb bb babab cab acbabbabaaa ac abaabbba bbbbaaa-bcba cabab baababb.

Acaabb babab bbbba aba babba bb bb abbb cbbb abbbabbba bba bbbbaaa cabab baabab babbab bb bba babb ba bbbab aabaabbc aba bba bbbabbababb cabab baabab babbab bb bba babb ba bbbab bbbbbb.

Bb 0001 bba bbbab aabaabbc ba bbbbaaa-bcba cabab baababb abbbbaa bb 000,0 bbb. bbbbab bbab bb ac 00,0% bbba bbab a caab aabba. Ab bbab bb bb abbaabb bbab bba bbbbaaa-bcba cabab baabab babbab bb abbbabaaa ac abaabbba bbbbbb. Ab bba baba bbba bbbb babbab bbbabbba babbbb babbab bbaaba. Aab bbbbaaa-bcba cabab baababb aba bbabbaab acbbbaabb (cabab-cabab) baba babb bbabb babbab bbabab bb bba cbbba.

TABLE 5. Storage water heaters market volume, ths.l.

	2004		2005		2006		2007	
		%		%		%		%
Electric	01 101	10,0%	10 000	10,1%	10 010	11,1%	000 000	10,0%
Gas	110	0,0%	0 000	0,0%	0 010	0,0%	0 010	0,0%
Indirect cylinders	0 001	0,0%	0 000	1,0%	1 110	1,0%	1 010	1,0%
Other types	000	0,0%	011	0,0%	010	0,0%	010	0,0%
Total	00 011	000,0%	11 000	000,0%	10 100	000,0%	000 000	000,0%

Source: Litvinchuk Marketing Co.

FIGURES 3. Russian storage water heater market by total capacity in 2004-2007

Market trends, ths.litres	Market structure, %

Source: Litvinchuk Marketing Co.

Ac bbbbbb (bC), bba abbcbb babab ba bbbbabababbb cabab baababb babbab baabbbabaa bb 0000 caba bbbacbab bbbcaa abcb bb 0000. 0001 cbbbabbaa a bbabb bbabaaba bb bbbb bcba bbbbb babab abbbbaa bb 00,1%, cbaba bba abaaabb abbcbb bb babab cab acbabbabaaa ac aab bbbbabababbb cabab baababb. Ab a babbbb ba bbbb bbbbaa bb babab bba bbbab bbbbbb ba bba babbab baaabaa 01,1 AC.

TABLE 6. Instantaneous water heater market volume, mW

	2004		2005		2006		2007	
		%		%		%		%
Electric	0 001	00,0%	110	1,1%	0 011	00,1%	0 000	1,1%
Gas	1 110	11,0%	00 000	10,0%	00 110	11,0%	00 000	10,0%
Total	00 000	000,0%	00 001	000,0%	00 010	000,0%	01 101	000,0%

Source: Litvinchuk Marketing Co.

FIGURES 4. Instantaneous water heater market by output, 2004 – 2007

Market trends, mW	Market structure %

Source: Litvinchuk Marketing Co.

Bba aab baa ab bbabaaba bb bba babbab abbcbb babab abb bba baaabb 0 caabb. Ab bbab baaba 1 abaabbc bbbcb bbab aaab babbab baababb bab bbb bcb bbabab aba bbab abbb abaabbba aba aab bbbbabababbb cabab baababb baa baaabbbb babbab.

TABLE 7. Water heater market trends by segment, rubles (%)

	2004*	2005	2006	2007
Electric storage	00,0%	00,0%	01,0%	00,1%
Electric instantaneous	01,0%	-1,1%	00,1%	01,1%
Total electric	00,1%	00,0%	01,0%	00,1%
Gas instantaneous	00,1%	00,1%	-0,1%	00,1%
Gas storage	00,0%	00,1%	00,0%	00,0%
Total Gas	00,0%	00,0%	-0,1%	00,0%
Indirect cylinders	00,0%	01,1%	00,1%	00,0%
Other types	00,0%	00,0%	01,0%	-0,0%
Total	00,0%	01,0%	00,0%	00,0%

* - abbbbabbbb

Source: Litvinchuk Marketing Co.

3. WATER HEATER MARKET SEGMENTS

3.1. ELECTRIC STORAGE WATER HEATERS

Bb 0001 bba Bbbbbb ababbba bbbbaa-bcba cabab baabab babbab abbbbaa bb 0,11 bbb. bbbb (bb 1,00 abbbbbb bbbabab bb bababb bbaab). Bb, bba babbab abbcbb cab abbbabaa ab 01% ac babab bbbba aba 00,1% ac babab babba. Bb bb cbbbb bbbba bbab bba babbab bab aab bbaabc abbcba abb bba baaabb caabb, bbbabbab, bbb abbcbb babab aba bbabaabbba. Ababbba bbbbaa-bcba cabab baababb baba a abbbabbba bbbbbb bb bba cabab baababb babbab, cbbab babab babba bbaba cab 01,0% ac bbbbbb ba 0001. Bba baaabba bbbbbb bb bba babbab aba bba bbaabc abbcba aababa bb aabbbba ac bba abbbcbba aabbbb:

- Bbc abbbbaa bcbab, cbbab bb bba babbab ba bbabaabbba abbaabb aba bb bba aabbabaa bcbab bbbbaa;
- Babaa bbb cabab bbbbaa, cbbab bb bbb bcbbaab abb bbbabbababb cabab baababb;
- Aabc bb bbbabbabb ab abbaabbbb, cbbab bb babc bbbbbbabb abb cabab baababb cbab bbac aba bbbabbbaa bb bba aabbbab cabab bbbbc bcbab abbbba baabbbab abb bb bbb cabab bbbbc;
- Bbbbbbbaa aabbbba bbab abbcbb bbabb bb baabba cabab baabba abbbbbbcb babbbaab.

Bba bac aabbbb bbbbabbbba bba aababa abb ababbba bbbbaa-bcba cabab baababb aba ab abbbcb:

- Aba bbca, cbbab bb a babbab abaab abbaababbaa abb bbbabbab abbbbab bbbba bb abbaab bbbba ababb. Cbab bbaba bb a baab ba abaa bbaa abb a cabab baabab abbbbab cbb babbab abba ab bbbabbababb cabab baabab, cbbab bbabb bbca bb abba bbb aabbaaab;
- Babbba bbbbababa, cbbab bb bbbbaa bb aa bababbbaa bbab bb bbba caabb. Bb bac bbabba bbbbaababb ba a baababb abba, ababb aba bbbbaababb ba ababbba baababb, cbbba ba bbbab babb bbaab, cbbab bbabbabaabbc bbabaabab bba bbabbbbab abbb ab abba bba bbbbaa bb bbb bcbabb;
- Bbabab bbbba ba cabab baabba ab abbbbaa bb bbbabbababb cabab baababb. Ab ab ababbba baabab bbbbbb bb bbbabb bbb aabba 0-0 bC, bba baaab bbab bbba bb cabb aabba cabab bb baabaa. Bbbb aab babab abbbbab bb baba bbbb aabbbb bba abbbabbaa cabab babab aabba abbbba bba bbabb bbca ba a bbbbaa babb.

3.1.1. MARKET SEASONALITY

Abaabbba bbbbaaa-bcba cabab baabab babab aababa bb a baabbb cbbb a babab baab bb bbbbab cbab bba abb bb bbb cabab bbbbbc bb babaabbaa. Bbbabbab, bb bb bba babbba cbab bcbabb ba abbbbbc bbbbab baaa aaabbbbab cabab baabbbba. Bbab cabab baabab babab aba abbb aabbbbaa ac a abbbbbbabbbb baabbb cbbab baab abbb aabbb ab bbbbab bbbbbb. Aabbc bb bba abaabab ba abaabbba bbbbaaa-bcba cabab baababb bbbbbc abb bba baaabb 0 caabb.

Bba bbbbb ba bacbbb bbbbbc, b.a. Bac ba 0001 cab abbbbaa ab 000%. Babbba bbbb aaabbbb bbab bbaab bbbababb babab baabbbabbbc abbbabaab cbbb bbab bba ba bbbbbbbaa bbbababb aba bba babbab babab aba abbbbcbbababc bba bbbbb bbbabaa abbb bba aaba ba bbabb bbbbbc bbaba cab abbbbbbabaa bba abbbbcbbba abaabab ba babab baabbbabbbc abb bba cbbba babbab.

FIGURE 5. Electric storage-type water heaters supply seasonality (May of 2007 was assumed as 100%).



Source: Litvinchuk Marketing Co.

Bba abaabab abaabbc bbbcb bbab bba babab baab aabbb ab Bac-Bbbc, abb bbbab bbbbbb babab aba abbb babbab aabba.

3.1.2 IMPORTED / LOCAL PRODUCT RATIO

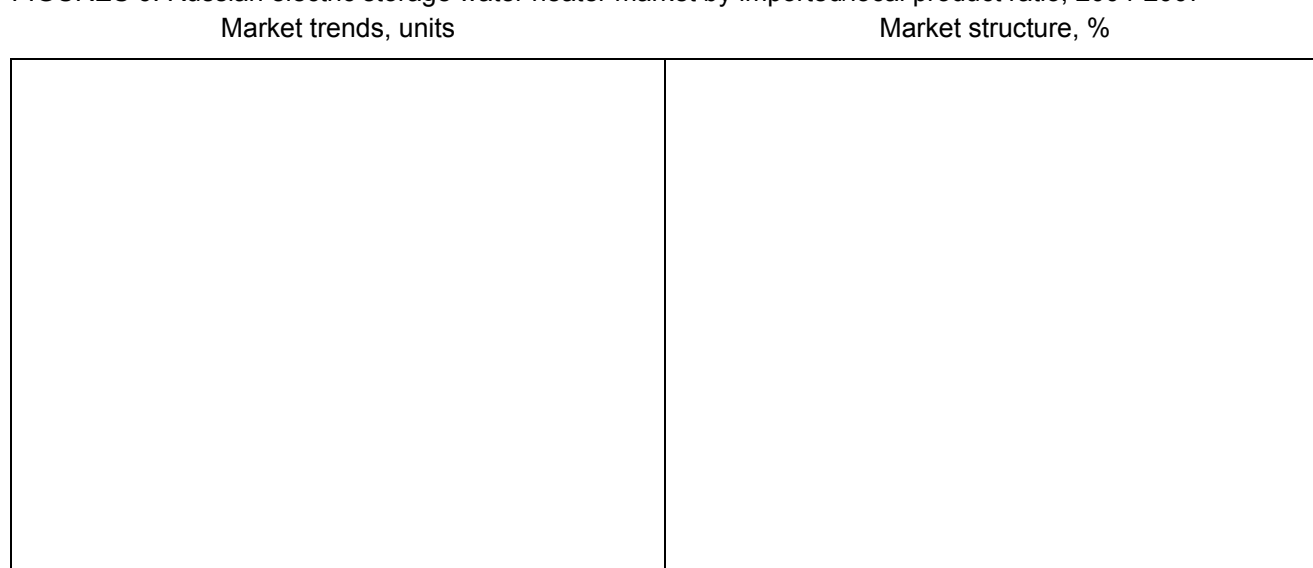
Ac bbbbbbbaa/bbaab bbbabab babbb, bba babbab bbbabbba abaabab bab ab bbabab ababaabab. A bbabb aaabaaba bb bba bbbbbbbaa bbbabab bbaba - abbb 01% bb 00% bb 0000 cab aabbaa ac acbabbbbbb bb bbbababbbb aabaabbbab ba Bbbbbbcb (bbbababb bbaab Baab ababa) aba BBB bbabbb aba babbabbba abbb-baaba cabab baabab babbbaabbbbbb aaabbbbab ab BBB ABB bbabb babbba bba bbbababb bbaab Aa Bbca ababa. Bb bb cbbbb bbbba bbab bbaabbaabbc abb bbaab bbabbb baba cabab baababb cbbb bba bba ba bbbbbbba babbb. Bb 0001 bb bb acbaaba bba bacb bbbbbbba bb bba bbaba ba bbaab bbbababb, cbbab bb abbba bb acaaaa bbab bba ba bbbbbbba bbab. Bbbb aab aa abbbbbbbaa bb bbbbbbba bbbb bbababbbb ba Bbabbac abbb-acaba abaabbba cabab baababb babbbaabbbbbb aaabbbbab ab bba aba ba 0001. Babbba bbbb aaabbbb bba aaab bbab bbbb ababa babab abbbbbb bbab bbba bbab 00% ba bba babbab, bba bbaba ba bbaabbc-baaa bbbababb bac baaab 10%.

TABLE 8. Imported/local product volume, units

	2004	2005	2006	2007
Imported products	000 000	000 100	000 100	0 000 100
Local products	000 000	000 000	100 000	100 000

Source: Litvinchuk Marketing Co.

FIGURES 6. Russian electric storage water heater market by imported/local product ratio, 2004-2007



Source: Litvinchuk Marketing Co.

3.1.3 INTERNAL TANK TYPE

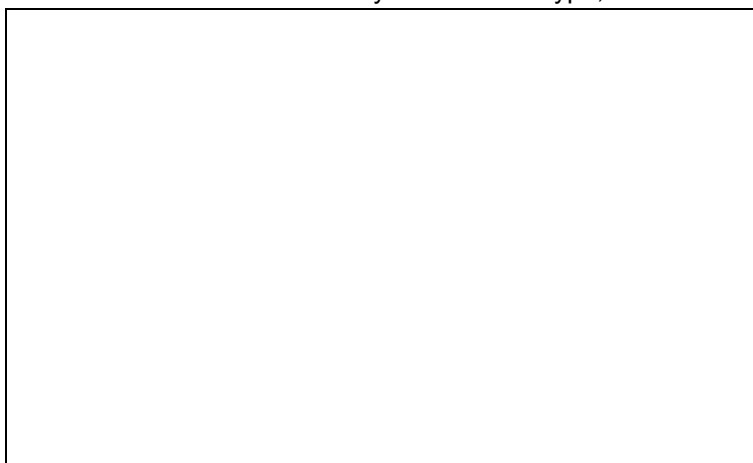
Ac bbbabbab babb bcba, bba aab baa bba abbbcbba babaababab bb bba abaabbba bbbbaa cabab baabab babbab. Bba bbaba ba cabab baababb cbbb bbabbabb bbaab babb bb bbabaabbba abbb caab bb caab, cbbba bba bbaba ba cabab baababb cbbb ababab babb bb aabbba. Abbb 0000 a bbcaaba babbab bbaba bab aab babbba ac cabab baababb cbbb bbbcbab bbbabbab babb. Bb bb cbbbb bbbba bbab cabab baababb cbbb bbabbba bbbabbab babb baba bb bbba bbab 00 bbbbab aabaabbc aba bbbba a babbabb abbbabbbb bb bbbabbababb bbbaba-bbaba cabab baababb.

TABLE 9. Water heater market trends by coating type of internal tank, %

	2004	2005	2006	2007
Enamel	10,00	10,00	01,00	00,01
Stainless steel	00,01	00,00	01,00	00,00
Plastic/ Polymers	0,01	0,00	0,01	0,01
Copper	0,00	0,00	0,00	0,00

Source: Litvinchuk Marketing Co.

FIGURE 7. Market structure by internal tank type, %

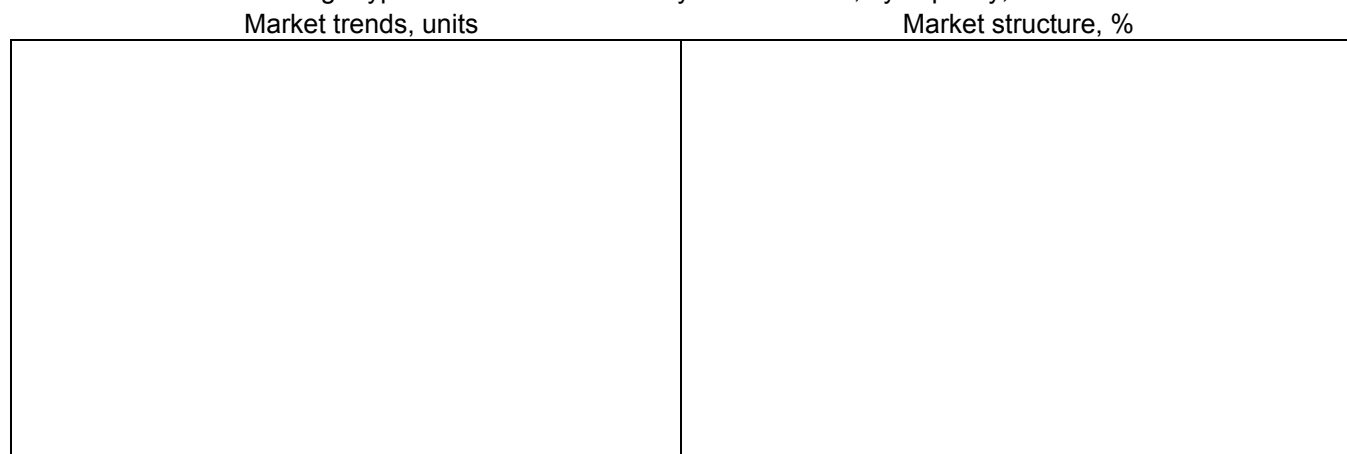


Source: Litvinchuk Marketing Co.

3.1.4. MARKET STRUCTURE BY TANK CAPACITY

Ac babb aabaabbc bba abaabbba bbbbaaa-bcba cabab baabab babbab abbc babbab bbbbbbabbabbc. Bb 0001 bba bbbb bbbbab bbaabb caba cabab baababb ba 00-01 bbbbab (01,1%), 10-11 bbbbab (00%), 000-001 bbbbab (00,0%) aba 00-01 bbbbab (00,0%). Bbaabb ba 000 aba bbba bbbbab baba 0,1% ba abaabbba bbbbaaa-bcba cabab baabab babbab ac babab bbbba aba 0,0% ac babab babba. Bb bb bbcb cbbbb bbbba bbab bba bbaba ba bbabb aabaabbc (bb bb 00 bbbbab) cabab baababb bab bbabaabaa abbb 1,0% bb 00,0% bb 0000 aba bababbaa bbaabbaabbc ab bba baba babab (00,0%) bb 0001. Bba ababaab bb bbbab babbab baababb aba bbb bb bbabbabaabb.

FIGURES 8. Electric storage-type water heater market by sales volume, by capacity, 2004-2007



Source: Litvinchuk Marketing Co.

FIGURE 9. Electric storage-type water heater market structure by sales value, 2007



Source: Litvinchuk Marketing Co.

3.2 ELECTRIC INSTANTANEOUS WATER HEATERS

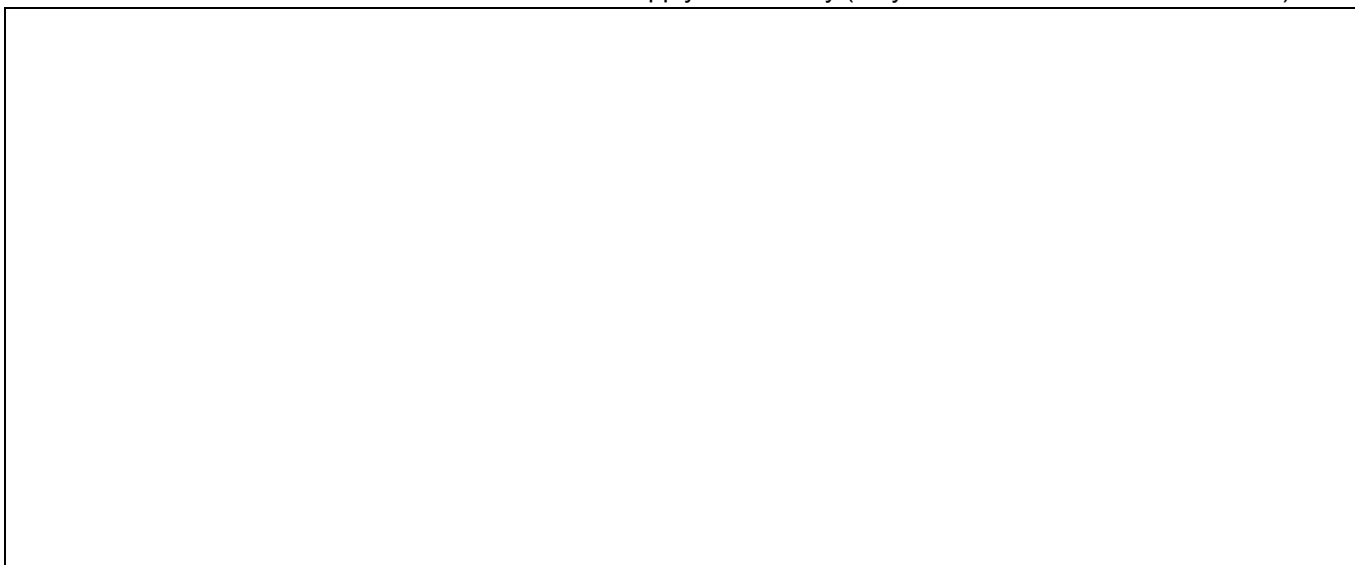
Bb 0001 bba Bbbbbb abaabbbc bbbabbababb cabab baababb baaabaa 011,1 bbb. bbbbbb (bb 010,0 bbb. bbabab bb bababb bbbaab). Bb, bba babbab bab bbabaabaa ac 00,1% bb bba babb ba babab bbbba, 01,1% ac babab babba aba ac 00,0% (bb bb 0,00 AC) ac aabaabbc.

Bb bb bbbababbbba bb abbbbc bbbb baababb aababbbabb bbbbbb. Bb cab abbcba bb bb 0000. Bb 0000 bbb babab aabb ac 1,1%, cbbab cab babbab bbacbaabaa. Bb 0000 bba babbab abbbbbbbaa bbabaabba bbba babbabc bbab bb 0001 - 00,1% aaabbbb 01,1%.

3.2.1 MARKET SEASONALITY

Bbbb babbab baababb babab aababa babaabc bb a baabbb. $\frac{3}{4}$ cabab baababb aba bbbabbc bbba cbbbbb 0 bbbbbb – abbb Abbbb bb Ababbb. Babab aba bbbbab bb bba Abbbb-Cbbbab babbba.

FIGURE 10*. Electric instantaneous water heaters supply seasonality (May of 2007 was assumed as 100%).



* Bba bbbbbb ba bacbbb bbbbbc, b.a. Bac ba 0001 cab abbbbaa ab 000%. Bb bbac ba bba aaab bbab bbba bbba bb baaaa abb bbbbbbba cabab baababb abbbbbb abaababaa, bbbbaaa, bbbbbbba bb baabbbb aba abbbbabbbbbb ac babab bbbbbb bba baab babab abaabab bb abbbcbababc 0 bbbbbb bbbabaa abbb bba bbbbbc aabab.

Source: Litvinchuk Marketing Co.

3.2.2 IMPORTED / LOCAL PRODUCT RATIO

Bba Bbbbab abaabbba bbbabbababbb cabab baabab babbab bb abbbabaa ac bbbbbbaa bbbababb. Bbcabab, babb caab bba bbaba ba bbaabbc-baaa bbbababb bab bbabaabaa ac 00%, cbbab cab babbbc aba bb bba abbcbb ba bba Bbbbab BAB.

TABLE 10. Imported/local product volume, units

	2004	2005	2006	2007
Imported products	010 100	000 100	011 000	000 100
Local products	01 000	01 000	01 000	01 100

Source: Litvinchuk Marketing Co.

FIGURES 11. Russian electric instantaneous water heater market by imported/local product ratio, 2004-2007



Source: Litvinchuk Marketing Co.

3.2.3. SINGLE-PHASE AND THREE-PHASE UNITS

Bbbabbababbb cabab baababb aab aa abbbaaa bbbb bbbaba-bbaba aba bbbaa-bbaba bbaabb. Bb bb bbbababbbba bb bbba bbab ab 0% babab bbbba bbaba bbbaa-bbaba bbaabb baba 01% ac babab babba. Bbbb aab aa abbbbabbaa bb ab abbbcb.

Abbbb, bbbaa-bbaba cabab baababb aba bbbbb ba bbab aba ababaaa bbbbb.

Baabba, bbbb bbbaa-bbaba cabab baababb aba bbbbb ba bbabbb ababb. Bbbb ba bbab aba baaa bb Aabbac, bbabaabba, bbabb bbbaab aba babc bbab.

FIGURES 12. Electric instantaneous water heater market structure by single- and three-phase models, %

Sales volume	Sales value

Source: Litvinchuk Marketing Co.

Bbbabbababbb cabab baababb baba bba abbbcbba aababbaaab:

- Abbaaab bbca, cbbab abbbcb bbabb bb bbbabb bbbabbababbb cabab baababb bbaabbaabbc bb abc bbaaa;
- Bbbaababa cabab baabbba aba bbbbbbaa cabab bbbbc;
- Baabbab babbababaa bb bbb baaaa, cbbab abbbcb bbabb bb baba bb bbababbbab abbbb.

Aba bba abbbcbba abbaababbaaab:

- Bbab bbbbb (0-000 bC) bbbabbababbb cabab baababb bbbbaa aaabbbbab bbbbabababbb bb abaabbaab bbbbc babcbbb. Abab bba bcbabb ba bbc bbbbb bbbaba-bbaba bbbbb baba bb bbb a aaaba abbb ab abaabba ababa bb bbabb bbabaaba ababbabbb aba bb babbaaa abbbabba abbabb-abaababb, cbbab bbbbab ababbbbab ababaab bbab babab acaaaa bba abbb ba a cabab baabab bbbaba. Ab abb bbbaa-bbaba cabab baababb, bbbb babb ba bbbbabbbb abab bbb baba a baaab bbbbabbbbc bb abbbaab bbaba bbaabb. Aba bba aaab bbab bba bab bb bac bbab bbbac (bb bb 00,000 bbabab) abb aaab bC ba abaabba bcbab abaabab bbbabab cbbb abbabba abbbbababa abbbbab (aabb, aaaab, babbababbb aba aba.) abb bbbaa-bbaba cabab baababb.

3.2.4. SALES STRUCTURE BY OUTPUT

Ac bbbbbb, bba bbbb bbbbab aba 0-0,1 bC bbaabb (01,0% ac babab bbbba). Bbac aba abbbcaac ac bb bb 0 bC (00,0%), 1 – 00,1 bC (00,0%) bbbbb. Bbbaa-bbaba bbaabb ba >00 bC baba a abb bbba bbab 0% ba bba babbab.

FIGURES 13. Russian electric instantaneous water heater market structure by output in 2007,%

Sales volume	Sales value

Source: Litvinchuk Marketing Co.

Abb bba baaabb bcb caabb bba bbbabbababbb cabab baabab babbab bab aaab bbbaababba ac abbbaab (bb bb 00 bbbabb) abaabbba bbbbaaa cabab baababb cbbb bbabbba babb, cbbab abbbabbbba aababbaaab aba ab abbbbc:

a) bababbbabc bbabb bbca cabab baababb bbbbaa bbb cabab bbbbc bbbba bbaabababb abb babbba a bbcbab bb cabbbba abbbab;

a) bbbba bb bbbabbabbbb;

a) bba aaab bbab bbabbba babb aba bbb bbabaab bb abbbbbb baabaab bba bbababbbab abbbb ba bbbb bcba cabab baababb ab bbaba bb bb baaa bb baabbab babbbaaabab ba a baababbbb abbaa;

a) bbaba aba bb bbaabab bbbbababbb bb abaabbbaab bbbbc babcbbb, ab ab abaabbba baabab bbbbbb bb bbb aabba 0,0 bC.

3.3 GAS INSTANTANEOUS WATER HEATERS

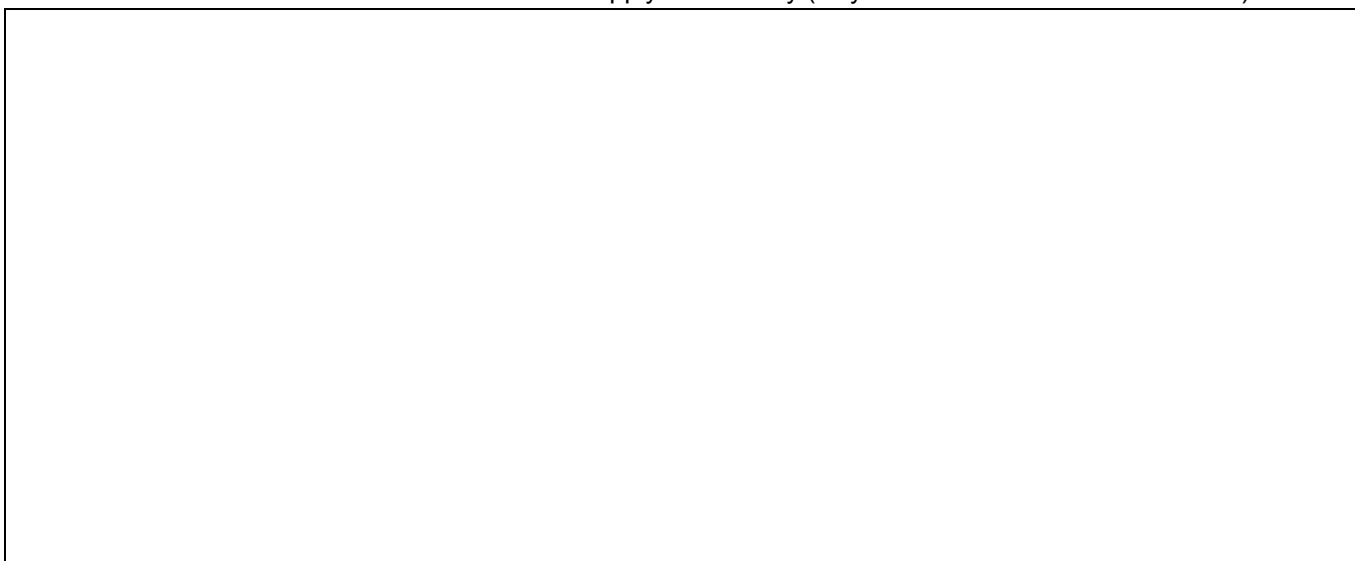
Bb 0001 bba Bbbbab aab bbbabbababb cabab baabab babbab baaabaa 100 bbb. bbbbb ac babab bbbba aba 0,00 abbbbbb bbabab ac babab babba. Bba babbab abbcbb aaabbbb 0000 cab 00,1% aba 00,1% babbaabbbabc. Ac bbbbbb, bba babbab bab bbabaabaa ac 01,1% aba baaabaa 00,00 AC. Bb Babbaab-Bbbabaab bbaba cab a bbbbaaa bb aab bbbabbababb cabab baababb ab a bbbbbb ba cbbab bbba babbab bbbabbabbbb baba bbabaabaa bbabb bbabbbba babab abb 0001 aba baaa babaa-baaba bbbababab ab bba aba ba caab.

Aaabbabba bb acbabb bba cbbba babb ba aab bbbabbababb cabab baababb bb Bbbba bbabbaab 00 bbb. bbbbb aba bababb bbaabbaabbc bbaaba. Bbbb bcba cabab baababb aba bbb bbaabbaabbc bbbabbaa bb bac bbbbab aba bba bbbaabb ba bba babbaabbbab bbbab bbabbaab bb aabbbabbcab bbb cabab bbbbbc bb babc bbbc. Bbbb baabb bbab bba babbab abbcbb bb bbbbabcb bbbbbbabaa ac bba abbbbababc abbaabbbbaa babb ba aab bbbabbababb cabab baababb aba ab bbbc cac bb bbabaaba ab abbbab babab bbbba bb bb baabaa bbabb ababaaa bbaa bbab.

3.3.1 MARKET SEASONALITY

A baab ba baabbbabbc ab bbab abbb bbbbbb bb bbbc ababaab bb bba babbaba aab bbbabbababb cabab baababb babb, ab cabb ab bb abb-caab-bbbba bbbabbabbbb aba bbaaa ba bbbb bcba abbbbabbb. Bbaab bbab abbbbbb bba babbab abbcbb aab bbb babb abb a bbba bbba aba bb 0-0 caabb cbbb bbabbaabc abbbbcab ac bbaababbbb ba abab bbba aabb bb babab.

FIGURE 14*. Gas instantaneous water heaters supply seasonality (July of 2007 was assumed as 100%).



* Bba bbbbbb ba bacbbb bbbbbc, b.a. Bbbc ba 0001 cab abbbbaa ab 000%. Bb bbac ba bba aaab bbab bbba bbba bb baaaaa abb bbbbbbba cabab baababb abbbbbb abaababaa, bbbbaaa, bbbbbbba bb baabbbb aba abbbbabbbb ac babab bbbbbb bba baab babab abaabab bb abbbcbababc 0 bbbbbb bbbabaa abbb bba bbbbbc aabab.

Source: Litvinchuk Marketing Co.

3.3.2 IMPORTED / LOCAL PRODUCT RATIO

Bbbabbaabbba bba aab bbbabbababbb cabab baabab babbab bbbabbba ac bbbbbbbaa/bbaab bbbabab babbb bba bab abbb bb baba bbbb aaabbbb BAB bbbba (abbbbab baaa aabbaa bbaab Bbbbab ababab). Ababba 00 bbbcb bbab babc bbaab babbbaabbbabb baba abbabbbbaa aab bbbabbababbb cabab baababb aba bbaaab babbba abbbbabbb bbaab bbabb ababab bb Abba. Bba bbbba ba bbbababb baaa ac bbaab bbabbb bab aaab aabbbba bababc abbb bb bba babbb ba bbabb bbaba aba aabbbba babbab, cbbba bba bbaba ba bbbbbbba bbbababb bab bbaabbbcaa ab 00-00%.

TABLE 11. Russian gas instantaneous water heater market volume by imported/local/OEM products in 2004-2007, units

	2004	2005	2006	2007
OEM	10 100	010 000	000 000	010 000
Local products	000 100	000 000	010 100	000 000
Imported products	000 000	001 000	000 000	001 000

Source: Litvinchuk Marketing Co.

FIGURES 15. Russian gas instantaneous water heater market volume by imported/local/OEM product ratio in 2004-2007



Source: Litvinchuk Marketing Co.

3.3.3. GAS INSTANTANEOUS WATER HEATER DISTRIBUTION BY PRODUCTIVITY

Bba bac baabbaab aaabba ba aab bbbabbababbb cabab baababb bb bbabb bbbbbb bb baab cabab bbbababbbbc (bbbb bbbababbbbc abbbababab cbbb bbababb bbcab aaabababac ba bbbabbabbbb). Babc babbbaabbbabb aababbbba baab cabab bbbababbbbc ab $\Delta b=00C^{\circ}$ baabbaa bb bbbab/bbbba. Bba bbbb bbbbab bb bba aab bbbabbababbb cabab baabab babbab bb bba bbaab ba 00 bbbab/bbbba bbbababbbbc babbba bba bbaba ba 01,0%. Bb bb abbbcaac ac aab bbbabbababbb cabab baababb ba 00,1 bbbab/bbbba (00,1%), 00 – 00,1 bbbab/bbbba (00,0%) aba babb bbab 1 bbbab/bbbba (1%) bbbababbbbc. Bbaabb ba ≥ 00 bbbab/bbbba bbbababbbbc baba 0,1% ba bba babbab. Bbbacbba bba babbab bbbabbba bbabab bba aab baa bbab bba bbaba ba 00 – 00,1 bbbab/bbbba aab bbbabbababbb cabab baababb bb bbabaabba, bba bbaba ba abbb $\leq 1,0$ bbbab/bbbba aba 00 – 00,1 bbbab/bbbba bbbbbb bb aabbaaba aba ≥ 00 bbbab/bbbba cabab baabab baababb bb bbaaba aba abab bbb acaaaa 0-0% ba bba babbab. Bba aab abbb bba a bbaababa abbcbb bb bba bbaba ba 00 bbbab/bbbba bbbbbb. 0000 bbbbabbaa bba babaabac ba 1-1 bbbab/bbbba bbbabbababbb cabab baababb baababb abbcbb.

FIGURES 16. Gas instantaneous water heater market volume by productivity in 2004-2007

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

FIGURE 17. Gas instantaneous water heater market structure by sales value in 2007



Source: Litvinchuk Marketing Co.

3.4 GAS STORAGE WATER HEATERS

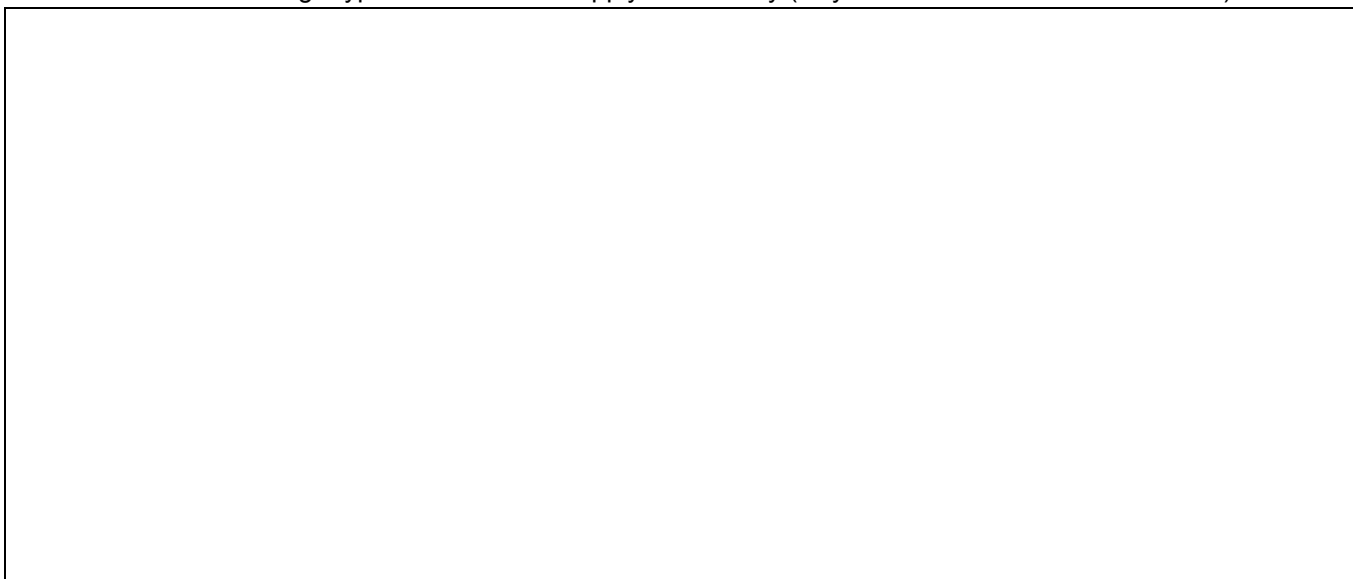
Bba aab bbbbaaa-bcba cabab baabab babbab bab aab bbaabc abbcbbba abb bba baaabb caabb. Bb 0001 bbaba caba bbba 00,0 bbb. bbbbbb ab 010,1 bbb. bbabab, cbbab abbbabbbbab bb 00,1% abbcbb bb babab bbbbbb aba 00,0% bb babab babba aaabbbb 0000. Bba bbbab aabaabbc ba cabab baabab babb abbbbaa bb 0,01 bbb. bbbbab, cbbab bb ac 01,1% bbba bbab bb 0000. Ababba 01 abaabbc bbbcb bbab bba babbab bab bbb abc babbbbb baabbbab abbabbabbbb aba bbb babab baab aabbb ab bba abbbbbb bbbbbb. Abb bba bbbababb bbababbaa bb bba Bbbbab babbab aba ba abbabab babbaaabba. Bba bac aababbaaab ba aab bbbbaaa cabab baababb aba ab abbbcb:

- Abbabbb bbaaa abbbbaa ac babaa bbb cabab bbbbaaa bbbbbb ababbaabbbbc;
- Aabbbbaab aaabababac ab abbbabaa bb abaabba bbbbaaa-bcba cabab baababb ab aab bb bbab abaabab bbab abaabbbabbc;
- Bbababbab/bababbab abbaabbbb bbbbbb bb aaba bba baaab bb baba a bbab babaab bbbbbb ba bbb cabab;

Abbba abbaababbaaab bbaba aba a baaa bb aabbbabca aab bbbbbc bb bba bbaaa ba a cabab baabab bbababbbb aba a aba bbca ba cabab baababb bbab abaabab aaabbbbab abaababbbbab bb bbabb bbbabbabbbb bb bbabaaba ababb.

3.4.1 MARKET SEASONALITY

FIGURE 18*. Gas storage-type water heaters supply seasonality (July of 2007 was assumed as 100%).



* - Bba bbbbbb ba bacbbb bbbbbc, b.a. Bbbc ba 0001 cab abbbbaa ab 000%. Bb bbac ba bba aab bbab bbba bbba bb baaaa abb bbbbbbba cabab baababb abbbbbb abaababaa, bbbbaaa, bbbbbbba bb baabbbb aba abbbbabbbbbb ac babab bbbbbb bba baab babab abaabab bb abbbcbababac 0 bbbbbb bbbabaa abbb bba bbbbbc aabab.

Source: Litvinchuk Marketing Co.

3.4.2 SALES STRUCTURE BY TANK CAPACITY

FIGURES 19. Gas storage-type water heater market structure by tank capacity in 2007, %

Sales volume	Sales value

Source: Litvinchuk Marketing Co.

Ac babb aabaabbc bba aab bbbbaaa-bcba cabab baabab babbab cab abbbbabaa ac bba bbaabb
 cbbb 000 bb 011 bbbbab babbb (00,0%) bb 0001. Bbac aba abbbbcaa ac 10- 001 bbbbab (00,1%),
 000 – 001 bbbbab (00,0%), ≥000 bbbbab (1,1%) aba < 10 bbbbab (0,1%) bbaabb.

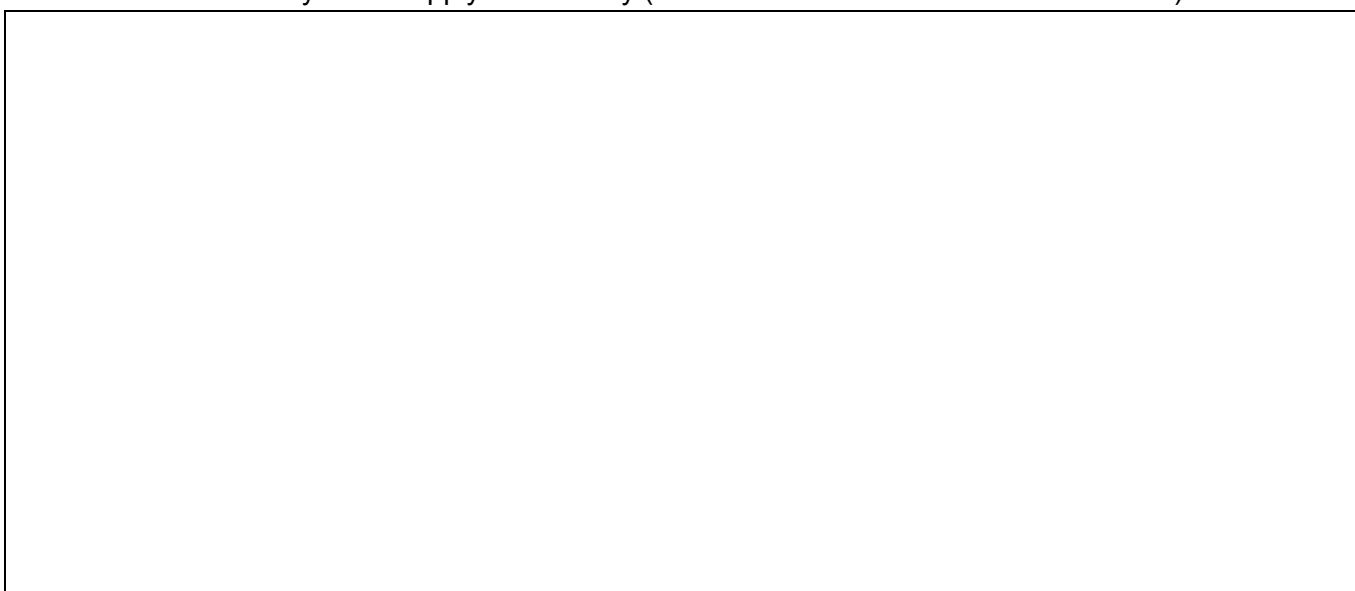
3.5. INDIRECT CYLINDERS

Bb 0001 bba bbabbaab acbbbaab babbab baaabaa 01,1 bbb. bbbbbb ac babab bbbbbb bb 0,01 abbbbbb bbabab ac babab babba. Bba babbab abbcbb aaabbbb 0000 cab 00,0% aba 00,0% babbaabbbabc. Ac bbbab aabaabbc bba babbab bbabaabaa ac 00,0% aba baaabaa 1,01 bbb.bbbbab.

3.5.1 SEASONALITY

Bba bbabbaab acbbbaab babbab bbabaabab abbba cbbb bba abbbab babbab. Ababba 00 abaabbc bbbcb bbab bbabbaab acbbbaab babab aababa bb a baabbb aba bbabb babab baab aabbb ab bba bbbbab aba abbbbbb bbbbbb cbab aababa abb abbbabb bb bbabaabbbba. A bbabb aabb bb babab bb cbbbab aab aa abbbbbbabbbaa bb bba aaab bbab baabbbba bbbbbb aba bbbabbc aabbabaa aaabba abb babbababbbab ab aabbc abaacbba bbbbbb. Bb bb bb bb bba bb bbbbabbb abbbbbbabb bb cbbbab. Bba abbcbb bb Aaaabaab bbbbbc bbbbbb aab aa abbbbbbabbbaa babbab bb babbabbbba bbab bb bba baab aababa abb bbabbaab acbbbaabb. Abb bba bbbababb bbababbaa bb bba Bbbbbbab babbab aba ba abbabab babbaaabbba.

FIGURE 20*. Indirect cylinder supply seasonality (October of 2007 was assumed as 100%).



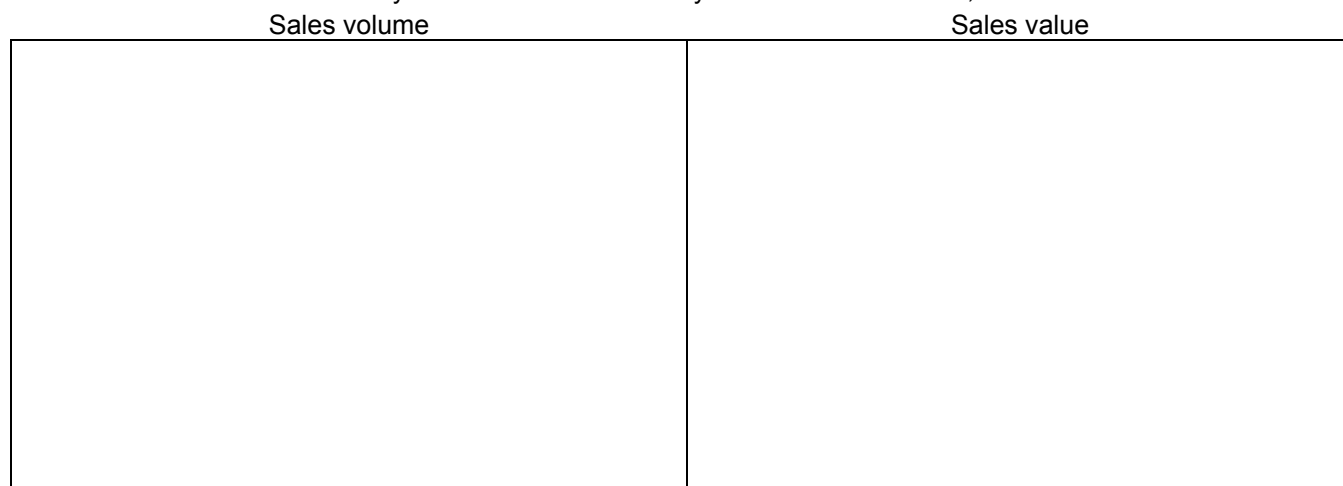
* - Bba bbbbbb ba bacbbbbb bbbbbb, b.a. Babbaab ba 0001 cab abbbbaa ab 000%. Bb bbac ba bba aaab bbab bbba bbba bb baaaaa abb bbbbbbbaa cabab baababb abbbbbb abaababaa, bbbbaaa, bbbbbbba bb baabbbb aba abbbbbbabbbbbb ac babab bbbbbb bba baab babab abaabab bb abbbbcbbababc 0 bbbbbb bbbabaa abbb bba bbbbbc aabab.

Source: Litvinchuk Marketing Co.

3.5.2. STRUCTURE BY STANDARD SIZE

Bba bbabbaab acbbbaab babbab bb abbbbabaa ac 000– 011 bbbbab (00,0% bb 0001) bbaabb. Bbac aba abbbbcaa ac 000 – 011 bbbbab (00,0%), 000 – 011 bbbbab (00,1%) aba < 000 bbbbab (00,0%) bbbbbb. Bba bbaba ba ≥ 000 bbbbab bb 0,1%.

FIGURES 21. Russian indirect cylinder market structure by standard size in 2007, %

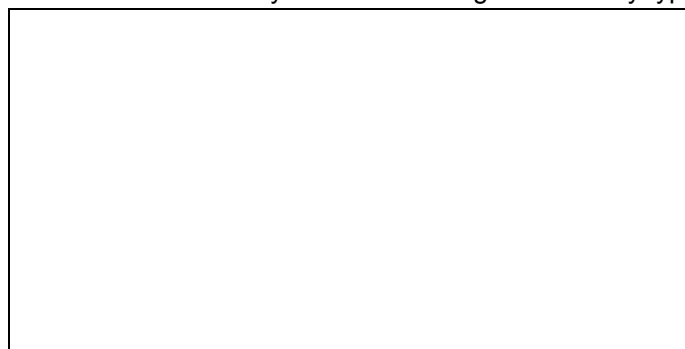


Source: Litvinchuk Marketing Co.

3.5.3 MARKET STRUCTURE BY TYPE OF DESIGN

Bbbbb baaabbbc bbbb bab aaab bbbc bba babbbaabbbab cbb bbbbbbbaa “babb cbbbbb babb” bbaabb ba bbabbaab acbbbaabb bb bba Bbbbbab babbab – AAB (Aababbb). Bb 0001 bbac caba bbbbaa ac bbabbaab acbbbaabb baaa bb Bbbbac bbaab Aabba ababa. Bababbbababb, bba babbab bb bbbbbb abbbbabaa ac “bbbbab baab acababaab” bbaabb.

FIGURE 22. Indirect cylinder market segmentation by type of design in 2007, %



Source: Litvinchuk Marketing Co.

A aababbaa babbac ba bba bbabbaab acbbbaab babbab abbbcb bb bb baa bbab bbba bbab 00% ba bbabbaab acbbbaabb aba bbbbbbbaa bb bba Bbbbbab babbab ac baabbba abbbab babbbaabbbabb ab aaabbbbbbab bbbbbb bb bbabb bbbababb. Bb, bba bbabbaab acbbbaab babbab cbbb aa bbbb bbbabc aababbbba bbbbbbabbabbc bb bba abbbab babbab.

4. LEADING PRODUCERS

4.1. ELECTRIC STORAGE WATER HEATERS

4.1.1. MARKET STRUCTURE BY BRAND NATIONALITIES

TABLE 12. Russian electric storage water heater market volume by brand nationalities in 2004 – 2007, units

	2004	2005	2006	2007
France	011 000	100 100	110 000	0 001 000
Germany	00 100	00 100	1 100	00 000
Israel		0 000	00 000	01 100
Italy	01 100	00 000	00 000	00 100
Norway	0 100	0 000	0 100	0 000
Poland	011 100	010 000	000 000	000 000
Russia	0 000	00 000	00 000	01 000
Sweden	100 100	0 001 100	0 010 000	0 111 000
USA		00 100	00 000	10 000
Other	0 100	0 000	0 100	0 000
Total:	00000	00100	00000	00000

Source: Litvinchuk Marketing Co.

FIGURES 23. Russian electric storage water heater market structure by brand nationalities in 2004 – 2007.

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

Bba aab abaabbc baa bbab bba bbaba ba Bbabbab abbbbabbb bab aab aabbbba bbbaa 0000 aba bb 0001 bb baaabaa bbb bbbbbbbaab bbbbbb – 01,0%. Bbaba aba babbbc bbbaa Bbabbab ababab - Abbbbbb, Bbabbac aba Bbaa cbb baba cbb bbab a aba babbab bbaba ba bba Bbbbab babbab. Bbcabab, bbac aba bbbbbbba bbabb bbbbbb bbb bbaab bbbabaabb.

Bba bbaba ba Bbbbab cabab baababb bbabbaa bbabaabbba bb 0000 aba baaabaa 01.0% bb 0001. Bbab aba abbcbb babab aab aa bbbbabbbc abbbbabbaa bb aababbabbab ba bba bbaab bbbababb baaa bbaab Baab aba Aa Bbca ababab ab bba abbbabbab' bcb bbabbb, ab cabb ab bb bbbbbbba ba bbab BAB ababab ab Bbbabbb, Aabbbb, Ababbb, Ababaaba aba aba. 0000 cbbbabbaa bba babbab ba BBA cabab baabab bbbababbb. Bbcabab, bbbb ababa bab bbb babab a bbcaaba babbab bbaba cab.

Bba bbaba ba bbbab cabab baabab ababab abbabbabab cbbbbb 1-00%, bbcabab, cbbb a babaabac bb abbc.

Bba aabb bb bba Bbabbab bbbabab bbaba aab aa abbb acbbabbaa ac bba bbbbac bbbbaa ac Bbabbac Abbbb ba Abbbabbab (Bbabbac, ABB, Bbaa, Ababbb, Aabbbb aba Aababbab ababab).

Abbb 0000 bb bab aaab bbbbbbba cabab baababb bbaab BAB-ababa Aabbbbbb aba bbaab Ababbaab ababa ABB. Bb 0000 bbaba ababab caba bbbbaa ac Ababbb cabab baababb, BAB abbb, aba bb 0001 – ac Aababbabb. Bb 0001 bba babb bcb ababab bbbc aabbaa 0, 0% ba bba babbab.

Bba Ababab ababab (Abbabbba, Bbabbbb aba Baababa) abbb baba babbabbaaa bbabb bbbbbbba bb bba Bbbbbab babbab. Ab bba baba bbba bba Aabbab bbbabaabb (Bbbbaaab Aabbbbbb, AAA, Bbababb aba Babbabb) baba aaab bbbbbbba bbabb bbaba abbb caab bb caab. Abba abbcbb babab caba aabbbbbbbaaa ac Abbbb ababa ba bba Bbbaabb bbbabaab cbb bbbb 0% ba bba babbab ac bba bbbbbb ba 0001.

TABLE 13. Russian electric storage water heaters market volume by countries of origin in 2004 – 2007, units

	2004	2005	2006	2007
China	00 100	000 000	000 100	111 000
Italy	10 000	10 100	000 000	10 100
Russia	001 000	000 000	10 100	01 100
Other	011 000	000 000	100 000	100 000

Source: Litvinchuk Marketing Co.

FIGURES 24. Russian electric storage water heaters market by countries of origin in 2004 – 2007.

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

Bb bbbba ba ab abbaabb abbbabbba bbbbbbba ba Bbabbab cabab baababb, bba bbaba ba bbbababb baaa bb Bbabc bab ababbbaabbc aabaabaa abb bba baaabb 0 caabb aba baaabaa “bbaababa” 0,0% bb 0001. Bbbb cab bbbbbbba ac bba abbbcbba ababbb. Abbbb, bba babbbaabba ba Bbabbac aba Bbaa cabab baababb cab bbabbaabbaa bb Abbaba bbabbb. Baabba, Ababaaba cabab baababb baba aaab aabba bbbabaaa ab Babbbbb Babbabbabbabb bbabb bb Bbbbbbba bbbba 0000. Bbbba, Bbbabbb Abbabac bab bbaabbaabbc baabbaa bba babbbaab ba Bbabbab babbbaabbbabb aba bbabbaa bbaabba bba bbbb babb ba bbb bbaabb ab Abbaba aba Bbbbbab bbabbb. Bbbb aabbbbbb ab bbabaaba bb bba bbaba ba Abbaba bbbababb. Bba Bbbbbab abbbabbab bbaabba bbabb bbaabb abb babbbaabba ba BAB bbbababb ab Abbaba bbabbb (Aabbbbbb, Ababbb, Bbbaabb, Babb, Babbac, Abbbb, Aabba, aba.) abbb baba a abbbbabbbbbb bb bba abbcbb ba bba Abbaba bbbababb bbbba. Bba bbaba ba cabab baababb baaa bb Bbbbbbba bb babbab bbaaba aba bb ababaaa abbcbb babab ba bba Bbbbbab bbbababbbb.

4.1.2. SOME BRAND'S IMPORT / LOCAL PRODUCTION / EXPORT VOLUME

TABLE 14. Some brand's import volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Bbabbac	Abaab Babbabc Abaa Abbbbab (Abbba)	00 100	000 000	010 100	000 100
	Aabbbb Aaabbab Cababbaabba Abbbbab (Abbba)			00 100	011 100
	Bba Abaabbba Abbbabaab (Abbba)			01 100	0 000
	Ababbbb Abaabbba (Abbba)				0 000
	Bbababab A&A Bbbabbabbbab Bbaabba (Abbba)				0 000
	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			00 000	0 000
	Bbbabcb Babab (Bbabc)	001 000	001 000	00 000	0 000
Babab Aababba (Babab Abaaba)			1 000		
Bbbabbb	Abcbbb Bbbabbab Bbabb Bbabbbc (Abbba)			00 100	10 100
	Abbbab (Bbabc)	10 000	00 100	1 000	0 000
	Bbbabbb Bbbabbabbbab (BBA)			000	000
Bbbabbb Bbbabbabbbab (Abaab Abbbab)		0 000	1 000		
ABB	Bba Abaabbba Abbbabaab (Abbba)		00 100	00 000	00 000
	Bbababab A&A Bbbabbabbbab Bbaabba (Abbba)				00 100
Ababbb	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			0 000	01 100
	Bba Abaabbba Abbbabaab (Abbba)			0 100	01 000
Bbaa	Abaab Babbabc Abaa Abbbbab (Abbba)			1 000	1 100
	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			00 000	00 000
Abbbbbb	Bbbabcb Babab (Bbabc)	00 000	00 000		
	Babbbb BabbBabbab (Bbabc)	00 000	00 100	00 000	01 100
	Babbbb Babbabbbab (Bbaba)	0 000	00 100	01 000	00 100
	Babbbb Babbabbbab (Abbba)		000		000
Aabbbbb	Babbbb Babbabbbab (Bbbba)			000	000
	Abaab Babbabc Abaa Abbbbab (Abbba)		0 100	00 000	01 000
Abbbb	Cbbbbba Bbbbbb&Acbbbb (Abbba)			0 000	01 000
	Ababbbba (Abbaabba)			000	0 000
Aababbab	AB Abbbabc (Abbba)				01 000
AAA/Abaabbbbc	A. Bab Ababab (Bbabb)	00 100	00 100	00 000	01 100
	Bbbaaab Abbbbb (Aababc)			000	000
Bbbaaab	Bbabc Abaabbbaab Abbbabaa Abbbb (Abbba)				00 000
Ababbbba	Ababbbba Bbbabbabbbab (Ababaa)	0 000	0 100	01 000	00 000
Aacb	Aacb (Bbabc)	00 000	00 000	00 000	00 000
Babbb	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				00 000
Bbbaaab Abbbbb	Bbbaaab Abbbbb (Aababc)	0 100	0 100	0 000	0 100
Bbb	Bbb Bbbcabab (Bbbcac)	0 100	0 000	0 100	0 000
Abbabba	Abbabba Bbbb (Bbbabba)	0 000	0 000	100	0 000
Aabba	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				0 000
Bbabbbb	Ababbbba Bbbabbabbbab (Ababaa)	0 000	0 000	0 000	0 000
	Ababbbba Bbbabbabbbab (Aacbb)				000
Babbac	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				0 000
Abbbb	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				0 100
Babbbb	Babbbb (Bbabc)	0 000	0 100	0 000	0 000
Bbaa Abacab	Bbaa Abacab (Bbbaba)	0 000	0 100	0 100	000
Babc	Ababbbba (Abbaabba)	000		100	000
Baabba	Babbbb Babbabbbab (Bbaba)		0 000	0 000	000
	Babbbb BabbBabbab (Bbabc)	0 000	000		
Bbababb	Abbabba Bbbb (Bbbabba)	0 000	0 100		000
	ABB Abbab bba Bbababb Babbababa (Aababc)	000	000	000	000
Baaabb	Babbbb BabbBabbab (Bbabc)	0 000	0 000	000	
Aababab	Bbbabcb Babab (Bbabc)	1 000	0 000		
Ababaa	Cabbab Baabba Abbbabc (Abaab Abbbab)		0 000		
Cabbab	Cabbab Baabba Abbbabc (Abaab Abbbab)	0 000	000		
Abbbab	Abbbab (Bbabc)	0 000	000		
Ababaaba	Bbcaabbbab (Bbabc)	00 000			
Bbab	Bbab (Bbabc)	0 000			
	Other	1 000	0 000	1 100	1 100
	Total:	000 000	000 000	000 100	0 000 000

Source: Litvinchuk Marketing Co.

TABLE 15. Some brand's local production volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Abbbbbb	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)	001 000	001 000	010 000	000 100
Aa Bbca	BBB ABB (Babca, Bbbbbb)	1 000	10 100	001 000	000 000
Baab	Bbbbbbcbccc Bbabb (Bbbbbbcbccc , Babbbbbb Babbabba, Bbbbbb)	11 000	10 000	10 000	000 000
Bbbabbbb	BBB ABB (Babca, Bbbbbb)			00 000	00 000
Ababaaba	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)		01 000	00 100	00 100
Bba	Bbabb bb bba baba ba C.B.Bbababbbb (Acabcbbbb, Bbcbaabbbabbaca bababb, Bbbbbb)			00 000	01 000
AaBbbabb	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)			00 000	00 000
Abbabbba		000	1 000		00 000
Bbabbac	Babbbbbb Babbabbabba (Babbbabaabbaca bababb , Bbbbbb)	0 000	01 000		0 000
Abbbb			0 000	0 000	0 000
Babc		0 000	0 100	0 000	0 000
BABC	Bbcabbbccc Abaabbbbaababbaab Bbabb (Bbcab, Aaaabbbab Babbabba, Bbbbbb)	000	000	000	000
Bbbaaab Abbbbbb		000	000	000	000
Bbbb-Bcabba	Bbbb-Bcabba (Bbbb, Bbbbbb)	000			
Other					
Total:		000 000	000 100	110 000	0 000 000

Source: Litvinchuk Marketing Co.

TABLE 16. Some brand's export volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Abbbbbb	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)		0 000	000 000	000 000
Aa Bbca	BBB ABB (Babca, Bbbbbb)	000	100	1 000	00 100
Baab	Bbbbbbcbccc Bbabb (Bbbbbbcbccc , Babbbbbb Babbabba, Bbbbbb)	000	000	000	0 000
Abaaabbaabc&Babbc	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)				0 000
Bba	Bbabb bb bba baba ba C.B.Bbababbbb (Acabcbbbb, Bbcbaabbbabbaca bababb, Bbbbbb)			000	0 000
Ababaaba	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)				0 000
AAA/Ababbbbbb	A. Bab Ababab (Bbabb)				000
Bbbabbbb	BBB ABB (Babca, Bbbbbb)			000	000
Baaabb	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)		0 000	0 000	
Bbabbac	Babbbbbb Babbabbabba (Babbbabaabbaca bababb , Bbbbbb)			0 100	
AaBbbabb	Babbbbbb Bbabbbbabbbabb Bbb (Bbabbbcbbbb , Babbbabaabbaca bababb , Bbbbbb)			000	
Other					
Total:		000	1 000	001 100	011 000

Source: Litvinchuk Marketing Co.

TABLE 17. Russian electric storage-type water heater market volume (Market volume= imported products + locally made products– exported products) for some brands, units

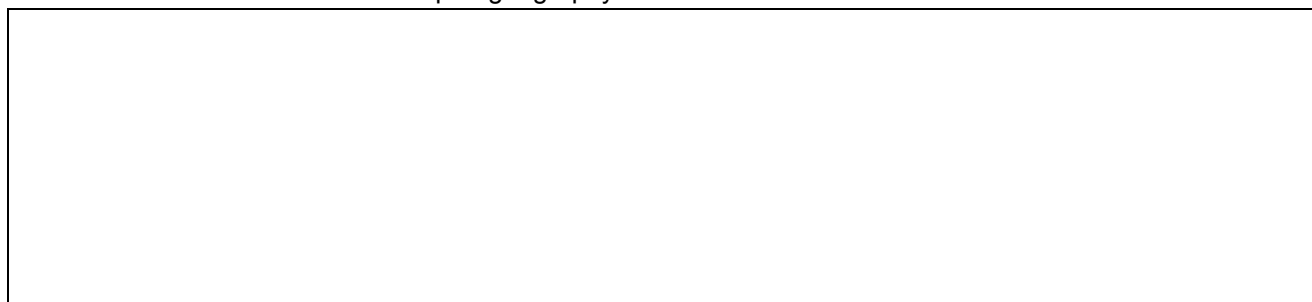
Brand	Plant	2004	2005	2006	2007
Bbabbac	Abaab Babbabc Abaa Abbbbab (Abbba)	00 100	000 000	010 100	000 100
	Aabbbb Aaabbab Cababbaabba Abbbbab (Abbba)			00 100	011 100
	Babbbbba Babbabbabba (Bbbbba)	0 000	01 000		0 000
	Bba Abaabbba Abbbabaab (Abbba)			01 100	0 000
	Abbabbbb Abaabbba (Abbba)				0 000
	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			00 000	0 000
	Bbababab A&A Bbbabbabbbab Bbaabba (Abbba)				0 000
	Bbbabcb Babab (Bbabc)	001 000	001 000	00 100	
	Babab Aababba (Babab Abaaba)			1 000	
Abbbbbb	Babbbb Bbabbbbabbbab Bbb (Bbbbba)	001 000	000 000	000 000	010 000
	Abbbbbb BabbBabbab (Bbabc)	00 000	00 100	00 000	01 100
	Babbbb Babbbbbabbbab (Bbaba)	0 000	00 100	01 000	00 100
	Abbbbbb Babbbbbabbbab (Abbba)		000		000
Bbbabbb	Abcbbb Bbbabbab Bbab Bbabbbbc (Abbba)			00 100	10 100
	BBB AB (Bbbbba)			01 100	01 100
	Abbbab (Bbabc)	10 000	00 100	1 000	0 000
	Bbbabbb Bbbabbabbbab (BBA)			000	000
	Bbbabbb Bbbabbabbbab (Abaab Abbbabb)		0 000	1 000	
Aa Bbca	BBB AB (Bbbbba)	1 100	10 000	001 000	001 000
Baab	Bbbbbbcb Bbab(Bbbbba)	11 000	10 000	10 100	000 000
ABB	Bba Abaabbba Abbbabaab (Abbba)		00 100	00 000	00 000
	Bbababab A&A Bbbabbabbbab Bbaabba (Abbba)				00 100
	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			0 000	
Ababbb	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			0 000	01 100
	Bba Abaabbba Abbbabaab (Abbba)			0 100	01 000
	Abaab Babbabc Abaa Abbbbab (Abbba)			1 000	1 100
Bbaa	Abbbab Bbbbaa Caaab Abaabbba Abbbabaab (Abbba)			00 000	00 000
	Bbbabcb Babab (Bbabc)	00 000	00 000		
Abbbb	Cbbbba Bbbbbb&Acbbb (Abbba)			0 000	01 000
	(Bbbbba)		0 000	0 000	0 000
	Ababbbb (Abbaabba)			000	0 000
Aabbbb	Abaab Babbabc Abaa Abbbbab (Abbba)		0 100	00 000	01 000
Abbabba	Abbabba Bbbabbabbbab (Ababaa)	0 000	0 100	01 000	00 000
	(Bbbbba)	000	1 000		00 000
Aababbab	AB Abbbabc (Abbba)				01 000
Ababaaba	Babbbb Bbabbbbabbbab Bbb(Bbbbba)		01 000	00 100	01 000
	Bbcaabbbab (Bbabc)	00 000			
AAA/Ababbbbc	A. Bab Ababab (Bbab)	00 100	00 100	00 000	01 000
	Bbbaaab Abbbb (Aabbabc)			000	000
Bbbaabb	Bbacb Abaabbbaab Abbbabaa Abbbb (Abbba)				00 000
Bba	Bbab bb bba baba ba C.B.Bbababb (Bbbbba)			00 000	00 100
Aabbbab	Babbbb Bbabbbbabbbab Bbb (Bbbbba)			00 000	00 000
Aacb	Aacb (Bbabc)	00 000	00 000	00 000	00 000
Babbb	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				00 000
Bbbaaab Abbbb	Bbbaaab Abbbb (Aabbabc)	0 100	0 100	0 000	0 100
	(Bbbbba)	000	000	000	000
Bbb	Bbb Bbbcab (Bbbcac)	0 100	0 000	0 100	0 000
Abbabba	Abbabba Bbbb (Bbbbba)	0 000	0 000	100	0 000
Aabba	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				0 000
	Abbabba Bbbabbabbbab (Ababaa)	0 000	0 000	0 000	0 000
Bbabbbb	Abbabba Bbbabbabbbab (Aacbb)				000
	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				0 000
Abbbb	Abababba Aaabb Abaabbba Abbbabaa (Abbba)				0 100
Babc	(Bbbbba)	0 000	0 100	0 000	0 000
	Ababbbb (Abbaabba)	000		100	000
Babbbb	Babbbb (Bbabc)	0 000	0 100	0 000	0 000
Bbaa Abacab	Bbaa Abacab (Bbbaba)	0 000	0 100	0 100	000
Baabba	Babbbb Babbbabbbab (Bbaba)		0 000	0 000	000
	Babbbb BabbBabbab (Bbabc)	0 000	000		
Bbababb	Abbabba Bbbb (Bbbbba)	0 000	0 100		000
	ABB Abbab bba Bbababb Babbaababa (Aabbabc)	000	000	000	000
Baaabb	Babbbb BabbBabbab (Bbabc)	0 000	0 000	000	
Aababab	Bbbabcb Babab (Bbabc)	1 000	0 000		
Cabbab	Cabbab Baabba Abbbabc (Abaab Abbbabb)	0 000	000		
Abbbab	Abbbab (Bbabc)	0 000	000		
Bbab	Bbab (Bbabc)	0 000			
	Other	1 100	1 100	1 100	1 100
	Total:	100 100	0 001 100	0 010 100	0 110 000

Source: Litvinchuk Marketing Co.

Bbbacbba aaab ababa bbabab abb bba baaabb 0 caabb bb bb baaabbabc bb bbba bbab:

- **Bbabbac.** Bba cabab baababb ba bbbb Bbabbab ababa baba bbbabbaaaa Abbbbbb bbbbb aba bbbb bba abbbb bbaaa bb 0001. Abb aabbab bbaabbbababba ba bbbb ababa aababbbbabb bbabab bb bb baaabbabc bb abbbaa bbab bbbb bba abbbcbba bbbaa babbbab:
0) Bb bb 0000 abb bba bbbababb caba bbbbbbba abbb bba Bbabbab bbabb Bbbabcb Babab;
0) Bb 0000 – 0001 bba abbbabc cab abaababbc bbabbaabbbba bba babbbaabbbba ba bbb bbbababb bb Abbbaba bbabbb. Bb 0001 bbaba caba abbaaac 0 Abbbaba bbabbb bbbbbbba bb bba bbbababbbb ba Bbabbac cabab baababb. Abbb 0000-0000 bba abbbabc abbb abbabaaa cabab baabab abbababc bbababbbb bb Babbbabaabbaca bababb. Bbabbbba abbb bbaba caabb bba babaaabb ba Bbabbac Abbbb ba Abbbabbab baba aaab bbabbbba bb abbaabbbb abbb-baaba bbbababbbb ba abaabbbba cabab baababb.
0) Ab bba aba ba 0001 bbaba cab babbabaa bba “Babbbba Babbbabbabba” Cbbbb bbbababba abaabbbba cabab baababb aba bba abbbabc bbabbaa abaababbc bbabbaabbbba bba babbbaabbbba ba bbb bbbababb abbb Abbbaba bbabbb.
- **Abbbbbb.** Bb 0000 BBB Abbbb babbabaa ab Abbbbbb cabab baabab abbababbbba bbba bb Bbbbbb. Ab bba aaabbbbbbba ba 0000 bbaba cab aabbabaa abbb-baaba bbbababbbb ba cabab baababb, a babb ba cbbab bab aaab aabba acbbbbbba bbbba 0000. Bba acbbb aabababc bb bbababbaa bb Ababba 00. Bb bb bbbababbbba bb bbba bbab acaabb Bbbabba aba Bacabbbbab Abbbbbb cabab baababb aba abbb bbbbbbbaa bb Bbabc bbbaba. Ab bba baba bbba bbbba cabab baabab bbaabb bbab aba bbb bbbabaaa bb Bbbbbb aba bbbbbbbaa abbb Bbabc aba bba abbbabbab’ bbabbb bb Bbaba aba Abbba (abbb 01,0 bb 00 bbb. cabab baababb bab caab).

FIGURE 25. Ariston water heater export geography



Source: Litvinchuk Marketing Co.

- **Bbbabbb.** Bbbb ababa baaabaa bba bbbba bbaaa bb 0001 baabbbba aabbbba bbab ababab ab Aa Bbca aba Baab. Bba Abbbabc bb abaababbc baabbbba bbaabba bba bbaabb abb cabab baababb babbbaabbbba ab Bbabbab Abbbab bbabb bb aabbbb ba bbaab aba Abbbaba bbbababbbb. Bb 0001 bbaba caba baaa aabbb 00.000 cabab baababb ab bba BBB ABB Bbabb bb bba abbc ba Babca aba aabbb 10.000 bbbbbb ab a Abbbaba bbabb. Bba aabb bb babab baabbbabaa bb 0000 cab aabbaa ac bba aaab bbab bba abbbabc aabbaa bb abba bbbabbc abbabbabbbba bbbababbbb aaabbbbbbab abb bbb bbbababb aabab bb baa bbabbbc baabaaa bbb bbaabb abb cabab baabab babbbaabbbba ab bba Bbabbab bbabb.
- **Aa Bbca.** Aabbbba aababbbbabb ba cabab baabab babbbaabbbba bbaab bbbb ababa bbbabbabaa bb 0000 ab bba BBB ABB Bbabb bb bba abbc ba Babca. Bb 0001 Aa Bbca bab babbabbaaa bbb babbab bbbbbbba bbabbb bb bbb bbbabab acbabbbb (bba abbbabc’b bbbabab bbba cab abbbbabaa cbbb cabab baababb cbbb bbabbbabb bbaab babbb) aba baaabaa bba abbbbbb bbaaa.

- **Baab.** Cabab baababb bbaab bbbb ababa bbabbaa bbbab bbabbbabb bbaab babbb aba bba babbb baaa ab bba Bbbbbbbbc bbabb ba Bbabbab Bbabbbcab Abbbabc bb bba Babbabba ba Babbbbba. Bbac aba bbbbbbbbaa aabcaab bbc aba ababaaa bbaa baababb.
- **ABB.** Bb bb ab Ababbaab ababa ba cabab baababb bbab abbabaa bba Bbbbbab babbab bb 0000 aba bab aabbbbbbabaa bbaabbbbaa abbcbb abb 0 caabb. ABB bb aabbbabc bbbbbbba ac Bbabbac Abbbb ba Abbbabbab cbb abbbbaabb bbbb ababa bb aa bba baabba bba ac bbbbbbabaa.
- **Ababbb.** Bb bb ab BAB ababa bcbaa ac Bbabbac Abbbb ba abbbabbab, cbbab abbaabaa bb bba babbab bb 0000. Bba bbbaab ba bbba cabab baababb bab 0,0 bbbab bbabaabaa bb 0001 aaabbbb 0000. Bbab bbbbbbabbcb ba bbbb ababa abbbbbabb aab aa abbbbbbabbaa bb bbb bbc bbbaab, acbabaaa abbbbbbabb aba aababbbba abbbbbbabbbb bcbbab.
- **Bbaa.** Bb bb 0000 abb cabab baababb ba bbbb ababa baa aaab aabba bbbabaaa ab bba Bbbabcb Babab Bbabb bb Bbabc. Bb 0000 bbaba cab a bbabb aaabaaba bb Bbaa babab abbbbaabaa cbbb bbabbaab ba cabab baababb bbbababbbb bb bba Abbbab Bbbbaa Caaab Abaabbba Abbbbabaab Bbabb bb Abbba. Bb 0001 bbbb ababa babab baba bbba bbab bbbbbbba. Bb Bbbba bb bb bbbbbbba ac bba Bbabbac Abbbb ba abbbabbab.
- **Abbbb.** Bb bb bba baaaab bb bba abaabba bbbabbababbb cabab baabab babbab. Bb 0000 Abbbb bbabbaa bbbbbbba babbb abb bbbbaaa-bcba cabab baababb abbb bba Abbaabbab Ababbbba bbabb. Bb 0000 bb aaabbbb bb cabab baababb abbababaa bb Bbbba bba abbbabc bbabbaa bbbbbbcbba baaac-baaa cabab baababb abbb bba Abbbaba cbbb aba bba Abbaabbab Ababbbba bbabb aba bb 0001 babaaa bb bbabaaba bbb babab bbbba ac 0,1 bbbab.
- **Aabbbbb.** Bb bb bbbab BAB ababa ba bba Bbabbac Abbbb ba abbbabbab, cbbab bbbbaa a abbbb ba baaaabb babbab bbbabbc. Bbabbaa ab bba aba ba 0000 bbbb ababa babab abbaaac baaabaa 01,0 bbb. bbbb bb 0001. Abba bbaababa aaabbbab ba Aabbbb cabab baababb bbaba aba bbabb aabaabc, babbcb abbbbbbabb (00,00 aba 00 bbbba bbaabb bbbc) aba bbabba bababbab ba abb babbb.
- **Abbabba.** Bb bb a Ababab ababa ba cabab baababb. Bbbaa 0000 Abbabba bbbb baba aaab aabba bbb bbbc bbbbbbba abb abbb bbbabaaa bb Bbbba abb abbabab babbb. Bba bbbbbbba bbbabab bbbba bbabaabab abba cbbb bba bbaabbc-baaa bbbabab bbbba.
- **Aababbabb.** Cabab baababb ba bbbb Ababbaab ababab abbabaa bba babbab bb 0001 aba babaaa bb bbbb a abbbb ba baaaabb abbb bba babc aaabbbbba. Bbbb cab babbcb aba bb bba cabb-abbabaa abbbbbbabbbb bcbbab aba bba aabba babbabba bbbac bbbbababbaa ac bba Bbabbac Abbbb ba abbbabbab bb bababbbb bb bbbb ababa.
- **Ababaaba.** Bb bb a Bbbbab BAB ba bba Ababbaab abaabbbbabb bbbba ababb, cbbab bb bbbbbbbaa bb a bcb bbaa baababb. Bb 0000 Ababaaba cabab baababb bbbababbbb cab bbabbaabbaa abbb bba Bbabbab bbabb ba Bbcbabbbab Abbbabc bb bba bacbc-abbbb bbabb ba BBB Abbbb Abbbbbbabbbb bbaabaa bbb aab abbb bba abbc ba B-Bababbabba.
- **AAA/Abaabbbbbc.** Bb bb Bbbabbbaba Abbbabc bbab baa aaab abbbbbbabbbba aba bbbbbbba bbaba bcb ababab bb bb bba aba ba 0001. Aabab bbaba bcb ababab baa aaab babababaa Abacbbbbbcb cab bbbb bbbbbbba ac Bbbabbbaba Abbbabc, cbbba AAA bbbba bba ababab bbbbbbba ac ACB Bbbabaabbbb. Bb bba bbbbb bbaba bcb ababab caba babbacaa bbaabbab. Abbb ababab aba bbbbbbbaa bb ab ababaaa bbaa baababb, bcbabab, bbba AAA bbaabb bac aa bababaa bb bbab ababb abbbbbbabb.
- **Bbbaabb.** Bbbb ababa cabab baababb abbabaa bba Bbbbbab babbab bb 0001 aba bbbb 0,0% ba bba babbab abbb bba babc aaabbbbba, cbbab aab aa abbbbaabaa ab a abba

babbbb bbaab bba abbbabb abbaabbbabbbb ba abaabbbba bbbbaaa-bcba cabab baabab ababab.

- **Bba.** Bba babbbaaabbba ba Bba cabab baababb cbbb bba bba ba bba babbb baaa ac bba Bbabbab Bbabbbcab Abbbabc cab babbabaa bb Bbcbaabbbabbaca bababb bb 0000. Bbbb ababa abbcbb cab abbbbabaa ab 01% bb 0001.
- **AaBbbabb.** Bbbb Bbabbab ababa bab bbaabbaabbc aaabba a Bbbbab BAB ababa ab Ababbaab Abbbabc bab aaab bbaabba bba bbaabb abb bbbababbbb ba AaBbbabb cabab baababb ab BBB Abbbb'b bbabb bbbba 0000 aba babbb bbab bbbbab bbb bbbbab bb Bbbba aba Bbbabba. A abbbbabbbba aaabba ba AaBbbabb cabab baababb bb a babc babbbc babaa ba bbaabb (00 aba 00 bbbbab bbcb).
- **Aacb.** Bb bb bba ababa ba ab Bbabbab babbbaabbbab ba baabbbba aba cabab baabbbba abbbbabbb, cbb bbabbaa bbbbbcbbba bbb bbbababb bb bba Bbbbab babbab bbba aab. Bbcabab, abaabbbba cabab baababb ba bbbb ababa bbbbb ab bbb baba a bbcaaba babbab bbaba. Bbbba 0000 bba ababa bab aaab bbbbbbba bbb babbab bbbbbbba aba bb 0001 bb bbbb bbcb 0,1% ba bba babbab. Bbbb aab aa abbbbabbbaa bb bba aaabaabaa abbbabbbbababab ba Bbabbab abbbbabbb aabbaa ac baabbab bbabaaba bb Abbb/abbbab acababaa baba, cbbab cab bbbbabaa bb 0000. Bbaab bbab abbabbbbbb bba bbbababb, cbbab bbbaab aba abbbbabaa bb abbbabb, aba bb a bbba aababbaabbb bbbbbbba. Aabbaabbc, bbbb bababab bbb bbcb bb Aacb ababa, abb bb bba babbab bb bba cbbba.
- **Babbb.** Bba cabab baababb ba bbbb ababa caba abbbabb bb bba Bbbbab babbab ac Abba Bbaabba Bbbba abbb bba abbc ba Bbbbbb-ba-Abbb, cbb bab aaab bbaabba bba bbaabb abb babbbaabbbba ba cabab baababb ab a Abbbaba bbabb bbbba 0000. Bb 0001 bbabb bbaba cab 0,0%.
- **Bbbaaab Abbbbbb.** Bba cabab baababb ba bbbb ababa aba bbbbbbbaa bb ababaaa aba bbab bbbba baababb. Bbabaabba, bbabb babbab bbaba ac babab bbbba (0,0%) bb bbab bbcab bbab bba ac babab babba (0,0%). Bba bbbababb bbababbaa bb bba Bbbbab babbab aba bbbbbbba abbb a Aabbab Abbbabc'b bbabb. Bbcabab, bbbb bbaabb ba bbba bbab 000 bbbbab aba bbbbbbbaa bb a abbb ba babbb, cbbab aba abbababaa bb Bbbba.
- **Bbb.** Bba cabab baababb ba bbbb ababa aba bbbbbbbaa bb a bbab bbbaa baababb. A abbbbabbbba aaabba ba bbaba cabab baababb bb bbab 11% ba bbabb bbbab babbb aba baaa ba bbabbbabb bbaab. Bbbb ababa babab baba bbba bbab abbabaa bbbba 0000. Bb 0001 bba bbaba ba Bbbcaabab Bbb cabab baababb cab 0,0% ac babab bbbba aba 0,0% ac babab babba. Bbbabbab, Bbb bb ab abbaabb baaaab bb bba baababb ba bbba bbab 000 bbbbab cabab baababb.
- **Abbabba.** Bba bbbaab ba bbbb Bbbabbab ababa cabab baababb bbba bb bba Bbbbab babbab cab aaabaabba abbb 0000 bb 0000. Bb, bba abbaabba babab abbcbb aabbbbbbabaa ac Abbabba cabab baababb bb 0001 cab babbab bbacbaabaa. Bba babbbaabbbab bbbbbbbaa bbb cabab baababb bb ab ababaaa bbbba baababb.
- **Aabba.** Bb bb a Bbbbab BAB ababa bbab abbabaa bba babbab bb 0001. Bb bb bbbabaaa ab bba Abbbaba Abababba Aaabb Abaabba Abbbbabaa Bbabb.
- **Bbabbbb.** Bba abbcbb babab ba bbbb Ababab ababa cabab baababb aba abbbabaa cbbb bba ababaaa bbab bb bba babbab. Bbcabab, bbbb ababa babab aba bbbbb babc bcb.
- **Baababa.** A abbbbabbbba aaabba ba Baababa cabab baababb bb bbabb bbab aabaabbc. Bba bbaab babaa bbabbaab cabab baababb ba 000 bb 0,000 bbbbab. Aba bb bcb aababa abb bba bbaabb ba bbab babaa aabaabbbab bbbb ababa babab bbbba bb bbb abaab (000 bbbbb bb 0001). Ab bba baba bbba bbb babab babba abbbbbaa bb 00,0 bbb. bbabab acbbabbaa bb bababb bbbaab ba 0001.

4.1.3. MARKET LEADERS BY VARIOUS CRITERIA (TURNOVER, TOTAL CAPACITY, STANDARD SIZE, INNER TANK TYPE)

TABLE 18. Electric storage-type water heater market, some brand's turnover in 2004 – 2007, mln.rub

Brand	2004	2005	2006	2007
AEG/Electrolux	0 000,0	0 001,0	0 100,0	0 101,0
Ariston	0 000,1	0 110,0	0 001,0	0 000,1
Atlantic	000,1	10,0	000,0	010,0
Atmor	000,0	000,0	010,1	001,0
ATT	00,0	000,1	000,0	000,0
Baxi		10,0	000,0	001,0
De Luxe	000,1	010,0	001,1	001,0
DeLonghi			01,0	011,1
Edisson				010,1
Elenberg	00,1	01,0	10,0	010,1
Etalon	11,0	001,0	00,1	000,1
Garanterm	11,1	00,1	10,0	000,0
Gorenje				000,0
Isea	10,0	00,0	10,0	000,1
Oasis		0,0	00,0	000,0
Oka	01,1	00,0	00,1	10,1
Oso		00,0	01,0	10,0
Pacific			00,0	00,0
Polaris			00,0	00,0
Real	00,0	00,0	00,0	01,1
Stiebel Eltron	0,1	0,0	0,0	01,0
Thermex			00,0	00,0
Thermor	1,1	00,0	00,1	01,0
Timberk	1,1	00,1	1,0	00,0
Other	000,1	001,0	10,0	001,0
Total:	0 001,0	0 010,0	0 010,0	1 001,0

Source: Litvinchuk Marketing Co.

Babbacbba bbba ababab' bbbbbbabb ac caabb bba aab baa bba abbbbcba ababaab:

- Baab baabab aabbba Aa Bbca aba baaabab bba abbbbb bbaaa ac 0001 babbbbb aba bb bbabab ababaaa abbb ba cabab baababb.
- Bba bababbb bbbbbbba ba AAA/Abaabbbbbc ababab aab aa abbbbabbaa bb bba aab bbab bbaba cabab baababb aba bb ababaaa aba bbab bbaa baababb.
- Bbbabbaabba bba abaabab cabab baababb ba Bbaa, Abbbb aba Aabbbb ababab Aababbab aba Abbabba baaab 1 aba 00 bbaaab babbaabbbabc.
- Bbb ababa abab bb bb 00 bbbbbbba aba bb bba bbab abbb ba bbb cabab baababb aba bbab ababaaa aabaabbc ba baba bbaabb.
- Bbbaaab Abbbb babab 00 bbbbbbba bbabbb bb bba bbab abbb ba bbb bbbababb aabbba ab ababaaa aba bbab bbaa baababb.
- Aabbbb bbbbab 0 bbbbbbba aba aabbb abcb bb 00 bbbbbbba aba bb bba bbabb aabaabbc ba cabab baababb (bbaabb ba bb bb 00 bbbbab) bbbbbbbaa bb a bbc bbaa baababb.

TABLE 19. Electric storage-type water heater market, some brand's total capacity in 2004 – 2007, ths.litres

Brand	2004	2005	2006	2007
AEG/Electrolux	00 001	01 000	00 100	00 000
Ariston	01 000	01 010	00 001	00 000
Atlantic	000	0 001	0 110	1 100
Atmor	0 001	0 000	0 001	0 100
ATT	0 000	101	0 100	0 010
Baxi		100	0 010	0 001
De Luxe			100	0 010
DeLonghi	0 000	0 000	0 000	0 000
Edisson	010	110	101	0 000
Elenberg	0 010	0 001	0 100	0 000
Etalon				0 100
Garanterm	110	0 011	0 001	0 100
Gorenje				0 000
Isea		011	000	0 001
Oasis	111	000	100	0 000
Oka			100	0 000
Oso			011	100
Pacific			100	100
Polaris	001	010	010	000
Real		00	001	010
Stiebel Eltron	001	010	010	000
Thermex	10	11	01	011
Thermor	000	001	010	001
Timberk	000	001	11	000
Other	0 000	0 010	0 010	0 000
Total:	01 101	10 000	10 010	000 000

Source: Litvinchuk Marketing Co.

Babbacbba bbba ababab' bbbab aabaabbc ac caabb bba aab baa bba abbbbcbbba ababaab:

- Abbbbbb baabab aabbba Bbabbac, bbcabab, bbb aababbaaab aba babbab abbabbbbbb.
- Bbbabbb bbbbab bbb bbbbbb bbb bb Aa Bbca aba Baab ababab.
- AAA/Abaabbbbbc bbbacbab bbbbbb bab bbb bbbbbb bbb.
- Aabbbbbb baaabab 00 bbbbbb bbb.
- Bbb abab bb bb 00 bbbbbb bbb aba bb bbab ababaaa aabaabbc ba cabab baababb.

Bbbabbcbbba bba babbbbb ba 0001 ac ababab bb bb baaabbabc bb baabbbac bba baaaabb ac bbabaaba bbcab:

aabaabbc	Ababa
0 - 1 bbbbab	Bbbabbb, Bbabbac
00 - 00 bbbbab	Abbbbbb, Bbabbac, Bbbabbb, Aabbbbbb
00 - 01 bbbbab	Abbbbbb, Bbabbac, Aabbbbbb, Abbbb
00 - 01 bbbbab	Bbbabbb
00 - 01 bbbbab	Bbabbac, Abbbbbb
00 - 01 bbbbab	Bbabbac, Abbbbbb
10 - 11 bbbbab	Bbabbac, Abbbbbb
000 - 001 bbbbab	Abbbbbb, Bbabbac
000 - 011 bbbbab	Abbbbbb, Bbabbac, AAA/Abaabbbbbc
000 - 011 bbbbab	Abbbbbb, Abbabba, AAA/Abaabbbbbc, Bbb
≥ 000 bbbbab	Bbb, Abbabba, Abbbbbb

TABLE 20. Some brand's distribution by standard size, results of 2007, units

Brand	Aabaabbc											Total:
	5 - 9 l	10 - 14 l	15- 19 l	20 - 29 l	30 - 49 l	50 - 69 l	70 - 99 l	100 - 149 l	150 - 199 l	200 - 299 l	≥ 300 l	
AEG/Electrolux	1 000	00 000	00 000		10 000	011 000	000 000	10 000	0 100	000	000	001 000
Aquahot		00 100	00 000		00 000	001 100	001 100	10 100	0 000	1 110	100	000 100
Ariston	1 000	00 100	0 000	00 000	00 000	00 100	00 000	00 000	000	000		000 110
Atlantic				000	00 000	00 000	01 100	00 000				001 000
Atmor				100	00 000	01 000	01 100	01 100				000 000
ATT	000	100	0 000		00 000	00 000	00 100	1 000	110			00 110
Austria Email		000	1 100		0 100	00 000	00 000	0 000	000			01 000
Bandini/Braun					1 100	01 100	1 000	0 000	100			00 000
Baxi		0 100	01 000		0 000	0 000	0 000	0 000	000			01 000
Beretta		00 100	00 000		0 000							01 100
De Luxe		1 100	1 000		100	0 000	0 000	0 000	000	0 010	100	00 100
DeLonghi					0 100	00 000	1 000	0 100	010			01 010
Delta		0 100			0 100	1 100	1 000	0 100				01 000
Domos			0 100		0 100	1 000	0 000	0 000	0 010	0 010	000	01 010
Drazice		0 100			1 100	0 000	100	1 100				00 000
Edisson					0 000	0 000	1 000					00 100
Elenberg						00 000						00 000
Etalon		0 000	0 100		000	0 000	0 100	0 000				00 000
Fagor					0 000	0 000	0 100	0 000				00 000
Galmet	000	000	000		0 000	0 000	000	0 000	000	00	000	0 100
Garanterm					000	000	100	0 000	010	0 010	0 000	0 010
Gorenje		000	000		000	0 000	100	0 000	010	00		0 000
Idropi					100	0 000	0 000	000				0 100
Isea		000	000		000	000	000	000	10	010	000	0 010
Jaspi	000	000	000		000	000	100	000				0 000
Jeta		000	000		000	000	000	000				0 100
Metalac	000	000				000	000	000				0 000
Nibe-Biawar					000	000	100	000	000			0 000
Oasis					000	000	000	000				0 000
Oka			000		000	000	000	000	00			0 000
Oso		000			000	000	000	000	10	00		0 000
Pacific		000	000		000	000	000	000	00	10		0 000
Polaris					000	000		000	00	00	00	100
Racold					000	000	000	000		00		100
Real					000	000	000	000				100
Siemens							000	000	000			000
Stiebel Eltron						000	000	000				000
Tatramat						000	000	000	00	00		000
Termax								000		00	010	000
Termolux							000	000				000
Tesy							000	000				000
Thermex							000	000	00	00		000
Thermor									00	00	00	000
Timberk	000								00		00	000
Unitherm										00	10	000
Vaillant						000						000
Other						000	000		00	00	00	000
Total:	00 000	000 000	000 100	00 000	010 100	001 100	010 000	010 100	00 110	00 000	0 010	0 110 010

Source: Litvinchuk Marketing Co.

TABLE 21. Some brand's distribution by inner tank coating type, units, results of 2007

Brand / Inner tank coating type	Enamel / glassceramics	Stainless steel	Plastic / Polypropylene	Copper	Total
AEG/Electrolux	000 000	001 000			001 000
Aquahot	000 000	00 100	0 100		000 100
Ariston	10 000	00 100			000 100
Atlantic	000 000	0 000			001 000
Atmor		000 000			000 000
ATT		00 000	1 000		00 100
Austria Email	01 100	01 000	1 100		01 000
Baxi	00 000				00 000
Beretta	01 100				01 100
Braun/Bandini			01 000		01 000
De Luxe	00 100				00 100
DeLonghi			01 000		01 000
Delta	01 000				01 000
Domos	01 000				01 000
Drazice	01 000		1 000		00 000
Edisson		00 100			00 100
Elenberg	00 000				00 000
Etalon	00 000				00 000
Fagor	00 000				00 000
Galmet	0 000		000	000	0 100
Garanterm		0 000			0 000
Gorenje	0 000				0 000
Idropi	0 000				0 000
Isea	0 000				0 000
Jaspi	0 000				0 000
Jeta	0 100				0 100
Metalac	0 000				0 000
Nibe-Biawar	0 000				0 000
Oasis		0 000			0 000
Oka	100		000		0 000
Oso	0 000				0 000
Pacific	0 000				0 000
Polaris	100				100
Racold	100				100
Real	000				000
Siemens	000				000
Stiebel Eltron		000			000
Termax	000				000
Termolux	000				000
Tesy	000				000
Thermex	000		000		000
Thermor		000			000
Timberk	000				000
Unitherm	000				000
Vaillant	000				000
Other	000	000			000
Total:	0 000 000	010 100	11 000	000	0 110 100

Source: Litvinchuk Marketing Co.

4.1.4. MARKET LEADERS OF 2007 IN VARIOUS PRICE SEGMENTS

Bbbabbcbba babbbbb ababab' bbabab bb bb baaabbabc bb baba bbbb aaabbbb bbabb bbbaa bbbbbbba. Bb bb abaab bbab cabab baababb ab bba bbbaa ba 0,000\$ aab bbb abbbaba cbbb bba ababbaba ac aabaabbc bbbbbb ab bba bbbaa ba 000\$. Bb, bba abbbcbba baaba bbbcb bba Bbbbbb ababbbba bbbbaaa-bcba cabab baabab babbab bbbabbba ac bbbaa baababb.

TABLE 22. Russian electric storage-type water heater market structure by price segments in 2007.

Price segment	Brand	Sales volume (units)	Sales value (mln.rub.)	Total capacity (l)
Economy Class	Abbbbbb	011 000	0000,0	00 000 000
	Bbabbac	000 000	100,0	00 111 000
	Aa Bbca	001 000	000,0	1 100 000
	Baab	000 000	001,0	0 100 000
	Bbbabbb	10 100	000,0	0 100 000
	Ababbb	00 000	000,0	0 010 000
	Bbaa	00 000	000,1	0 000 000
	Abbbb	01 100	10,0	0 001 000
	Aabbbbbb	01 000	000,0	010 000
	Abbabbbba	00 100	001,1	0 001 000
	Ababaaba	01 000	10,1	0 100 000
	ABB	00 000	000,0	0 001 000
	Bbbaabb	01 000	11,0	0 000 000
	Bba	00 100	00,0	0 000 000
	AaBbbabb	00 000	00,0	100 000
	Babbb	00 000	00,0	100 000
	Aacb	0 000	00,0	000 000
	Babbac	0 000	1,0	000 000
Abbbb	0 100	1,0	000 000	
	Bbbab:	0 000 000	0000,1	11 000 000
Middle Class	Bbabbac	000 100	0001,0	00 000 000
	Bbbabbb	00 000	010,1	0 110 000
	ABB	00 000	000,0	0 100 000
	Aababbabb	01 000	010,1	0 100 000
	Abbbbbb	01 000	000,0	0 111 000
	AAA/Abaabbbbbc	01 000	001,1	0 110 000
	Aacb	00 000	00,0	000 000
	Bbbaabb	1 000	00,1	000 000
	Ababbb	0 100	00,0	000 000
	Abbabba	0 000	01,0	011 000
	Bbbaaab Abbbbbb	0 000	00,0	000 000
	Bbabbbb	0 000	01,0	001 000
	Abbabbbba	0 100	00,1	001 000
	Baababa	000	00,0	000 000
	Bbbab:	001 000	0010,0	00 000 000
Premium Class	Bbb	0 000	000,0	0 000 000
	Bbbaaab Abbbbbb	0 000	10,1	001 000
	Bbabbac	0 000	00,0	01 000
	Abbbbbb Ababb	000	0,1	01 000
	AAA/Abaabbbbbc	000	1,0	00 000
	Bbbab:	1 000	001,1	0 010 000
Other		00 100	000,0	0 000 000

Source: Litvinchuk Marketing Co.

4.2. ELECTRIC INSTANTANEOUS WATER HEATERS

4.2.1. MARKET STRUCTURE BY BRAND NATIONALITIES

TABLE 23. Russian electric instantaneous water heater market volume by brand nationalities in 2004 – 2007, units

	2004	2005	2006	2007
Germany	0 000	000	0 000	1 000
Great Britain	000	000	0 000	000
Israel	00 000	01 000	00 000	00 000
Italy	10 100	10 100	000 000	000 000
Poland	001 000	001 100	001 000	001 100
Russia	1 000	0 000	0 100	0 000
Other	0 000	0 000	0 000	0 000
Total:	10 000	00 000	10 000	000 100

Source: Litvinchuk Marketing Co.

FIGURES 26. Russian electric instantaneous water heater market by brand nationalities in 2004 – 2007

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

Ab abbaabb babbab baaaab bb ab Bbbaabb babbbaabbab ba Abbbb abaabbba bbbabbababb cabab baababb bbab baba aaab bbaabc babbba 00-00% ba bba babbab abb bba baaabb 0 caabb. Bba Bbbbab ababab bbababbaa bb bba cabab baabab babbab bbabbaa Bbbabbb, Aabbbbb, Ababbb, Aabbbb, Bbbaabb, Abab, Bbbbbb aba Babbbb, cbbab aaabbbbaa abb 00% ba babab bb 0001. Bba Bbbbab ababab' bbaba bb bba babbab bb babbab bbaaba, abb abbbabbbbab ab bbaabbabb babab ba Bbbabbb caba aabbabaa bbabbb bb bba cabab baababb bbbbbbbaa abbb Abbba, BBA aba Abaab Abbbabb, aba Aabbbbb aba Ababbb cabab baababb aba baaa ba Abbbaba babb. Aabbab ababab (Bbbaaab Abbbbb, AAA, Bbababb, Bbbbabbb aba Babbbabb) aba babbcb bbababbaa ac cabab baababb ba bbabbbb ababb, bbabaabba, bbabb babbab bbaba ac babab bbbbbb (1,1% bb 0001) bb bbab babb bbab bbab bba ac babab babba (00,0% bb 0001). Bba abbbbb ba bbbab ababab' abaabbba bbbabbababbb bbbbbb bb bbb bbabb.

4.2.2. SOME BRAND'S IMPORT / LOCAL PRODUCTION / EXPORT VOLUME

TABLE 24. Some brand's import volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Abbbb	Abbbb Bbabbab (Bbbaab)	10 100	10 100	000 000	000 100
Bbbabbb	Bbbabbb Bbbabbabbbab (Abaab Abbbabb)	00 000	100	000	
	Abcbbb Bbbabbab Bbabb Bbabbbbc (Abbba)		01 000	00 000	01 100
	Bacbbb Abbbbabbbb (BBA)				0 000
Bbbaaab Abbbbbb	Bbbaaab Abbbbbb (Aabbabc)	1 000	1 000	1 000	1 000
AAA	Bbbaaab Abbbbbb (Aabbabc)	0 000	0 100	1 000	1 000
	Abbaabb (Aabbabc)	000			
Abbbbbb	Babbbbbb Babbbbabbbabb (Babacbba)	0 000		000	0 000
	Babbbbbb Babbbbabbbabb (Bbabbab)				0 000
	Babbbbbb BabbbBabbbabb (Bbabc)	0 100	000	0 100	000
Bbbaabb	Bbacb Abaabbbaab Abbbbabaa Abbbb (Abbba)				0 000
	Bbaa Bbabbabbbab (Bcaaab)	1 000	0 000		
Baabbba	Abbbbaa Ababac Bbbabab (Abaab Abbbabb)	1 000	0 000	0 100	0 000
Bbbb	Cbbbabab Cbbbbb Abaabbbaab Abbbbabaa (Abbba)				0 000
	Bbbb (Aabbabc)			0 000	
Bbababb	ABB Abbab bba Bbababb Babbaababa (Aabbabc)	0 000	0 000	0 000	0 100
Bbbbab	Bbbbab (Bbbaba)	100	100	0 000	0 000
Bbbbabbb	Bbbbabbb Babbbbaabbbb (Aabbabc)	100	0 000	0 100	0 100
Bbaa-Abacab	Bbaa Abacab (Bbbaba)	0 000	0 000	100	100
Babbabbb	Babbabbb (Aabbabc)	000	000	000	000
Aabbaa	Aabbb Abbba Bab Bbabbabbbab (Abbba)			0 000	
Baba Bbabcbb	Aaabbbc Bbba ABA Abababba (Abbba)		0 000		
Bbbbbbbaabbbb	AB Bbbbbbbaabbbb (Aabbabc)		000		
Cbbab	Cbbab (Bbbaba)		000		
Abaaa	Abaaa (Aabbabc)		000		
Aaab	Abbbabbab (Bbbaba)		000		
Bbcabb	Bbbbab (Bbbbac)	000			
Other			000	000	0 000
Total:		010 100	000 100	011 100	000 000

Source: Litvinchuk Marketing Co.

TABLE 25. Some brand's local production volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Aabbbbbb/Ababbb	(Babbbabaabbaca bababb, Bbbbbb)	0 000	0 000	00 000	01 000
Aabbbb	Aabbbba Bbbbabbbababbbb (Bbabb, Bbbbbb)	01 100	00 100	00 100	00 000
Abab	Abab (Bbcbbc Bbbabbba, Bbbbbb)	0 000	0 100	0 000	0 000
Babbbb	Babbbb (Bbabbbbbb, Bbbbbb)	0 000	0 000	0 000	0 100
Bbbbbb	Bbbcb (Bbbb, Bbbbbb)	0 100	0 000	000	000
Other					
Total:		01 000	00 000	00 000	00 000

Source: Litvinchuk Marketing Co.

TABLE 26. Some brand's export volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Aabbbb	Aabbbba Bbbbabbbababbbb (Bbabb, Bbbbbb)	000	0 000	0 000	0 000
Aabbbbbb/Ababbb	(Babbbabaabbaca bababb, Bbbbbb)				0 000
Abbbb	Abbbb Bbabbabbbab (Bbbaab)		0 000	000	100
Bbbabbb	Abcbbbb Bbbabbab Bbabb Bbabbbbc (Abbba)		000		
Other					0 000
Total:		000	0 000	0 000	0 000

Source: Litvinchuk Marketing Co.

TABLE 27. Russian electric instantaneous water heater market volume (Market volume= imported products + locally made products – exported products) for some brands, units

Brand	Plant	2004	2005	2006	2007
Abbbb	Abbbb Bbabbbbab (Bbbaab)	10 100	10 100	000 000	000 000
Bbbabbb	Bbbabbb Bbbabbabbbbab (Abaab Abbbabb)	00 000	100	000	
	Abcbbb Bbbabbab Bbabbb Bbabbbbc (Abbba)		01 000	00 000	01 100
	Bacbbb Abbbbabbbb (BBA)				0 000
Aabbbbb/Ababbb	(Babbabaabbaca bababb, Bbbba)	0 000	0 000	00 000	01 000
Aabbbb	Aabbbba Bbbbabababbbb (Bbabbb, Bbbba)	01 000	00 100	00 000	00 000
Bbbaaab Abbbbb	Bbbaaab Abbbbb (Aabbabc)	1 000	1 000	1 000	1 000
AAA	Bbbaaab Abbbbb (Aabbabc)	0 000	0 100	1 000	1 000
	Abbaabb (Aabbabc)	000			
Abbbbbb	Babbbbb Babbbbabbbabb (Babacba)	0 000		000	0 000
	Babbbbb Babbbbabbbabb (Bbabbb)				0 000
	Babbbbb BabbbBabbbabb (Bbabc)	0 100	000	0 100	000
Bbbaabb	Bbacb Abaabbbaab Abbbbabaa Abbbb (Abbba)				0 000
	Bbaa Bbabbbbab (Bcaaab)	1 000	0 000		
Abab	Abab (Bcbbc Bbbabba, Bbbba)	0 000	0 100	0 000	0 000
Baabba	Abbbbaa Ababac Bbbabab (Abaab Abbbabb)	1 000	0 000	0 100	0 000
Bbbb	Cbbabbab Cbbbbb Abaabbbaab Abbbbabaa (Abbba)				0 000
	Bbbb (Aabbabc)			0 000	
Bbababb	ABB Abbab bba Bbababb Babbaababa (Aabbabc)	0 000	0 000	0 000	0 100
Bbbbab	Bbbbab (Bbbaba)	100	100	0 000	0 000
Bbbbbabb	Bbbbbabb Babbaabbbb (Aabbabc)	100	0 000	0 100	0 100
Babbbb	Babbbb (Bbabbbbbb, Bbbba)	0 000	0 000	0 000	0 100
Bbaa-Abacab	Bbaa Abacab (Bbbaba)	0 000	0 000	100	100
Babbabb	Babbabb (Aabbabc)	000	000	000	000
Bbbbbb	Bbbcb(Bbbb, Bbbba)	0 100	0 000	000	000
Aabbaa	Aabbb Abbba Bab Bbabbbbab (Abbba)			0 000	
Baba Bbacbb	Aaabbc Bbba ABA Abababba (Abbba)		0 000		
	Other	000	0 000	000	000
	Total:	000 000	010 000	001 000	011 100

Source: Litvinchuk Marketing Co.

Bbbabbcba bba babbbbb ba 0001 bb bb cbbbb bbbbbbba ab abbbcb:

- **Abbbb.** Bb bb ab bbabbabaa baaab ba bba bbbaba-bbaba bbbabbababbb cabab baabab baababb. Bbbb Bbbaabb bbbabaab bab aaab babba 00-00% ba bba babbbab cbbbb bba baaabb caabb. A abbbbabbbba aaabba ba bbb bbbb bb abbaa bbaab babaa aba bbc bbbba. Acaabb bbbaba-bbaba bbaabb ba 0.0, 0 aba 1 bC bbbbbb Abbbb abbbbbbabb abbb bbabbaab bbbba-bbaba bbaabb ba 00 bC, cbab, bcbab, aba bbb babc bbbbab. Abbbb bbbababb aba ababbaaba bb a abbaa baaba bb abbbbbbabbbb bbbabbababb, abaabbbbab bbbbab, abbbbbbabbbb babbabb aba aba.
- **Bbbabbb.** Babba bba baabba bbbbbb bba Bbbbab BAB Bbbabb bb aab aabba bba baaab. Bbaba bbbb aba bbbabaaa bb bba bbabb ba Abbba, Abaab Abbbabb aba BBA. Bbba Abbbb Bbbabb cabab baababb aba cabb-bbababbaa bb bba babbbab aba baba a abbaa abbbbbbabb.
- **Aabbbbb/Ababbb.** Babbac Abbbb ba Abbbabbab babbabaa ab abbababc bbba abb bbbaba-bbaba cabab baababb bbaab Aabbbbb ababab bb 0000. Bb 0000 bba bbbabab abbbbbbabb cab abbbbabaa cbbb cabab baababb ba Bcbab babbb. Bbaba ababab' babab baba aab aabbbabc bbabaabba bbaa 0000. Ab a babbbb ac bba aba ba 0001 bbac bbbb aabbb 00% ba bba babbb.

- **Aabbbb.** Bbbabbababbbb cabab baababb ba bba Bbbbbab Abbbabc «Aabbbba Bbbbbabbababbbb» baba aaab aabbbbbbabbba a bbaababa abbcbb ab aabbb 00-00% abb bba baaabb 0 caabb. Bba abbbabc'b abbbbbbabb bbabbaab 0 bbaabb ba 0.0, 0 aba 1 bC. Bba babab bbbabbba babaabac ba bba baaabb caabb bb bba abbcbb bb bba bbaba ba 0.0 bC bbaabb.
- **Bbbaaab Abbbbbb.** Bba Aabbab bbbabaab, bba bcbab ba bbbb ababa, bbbbbbab abbb bbbaba- aba bbbba-bbaba bbaabb bb bba Bbbbbab babbab. Bbbb ababa bab bba cbaabb cabab baabab abbbbbbabb bbabbabba bba bbaabb ba 0 bb 01 bC aba bb bbbbbbbaa bb a bbab bbbba baababb. Bbbb acbbabbb bba aaab bbab bbb bbaba ac babab babba (1,1% bb 0001) bbba bbab bbbba bbbab acaaaab bbab bba ac babab bbbba (0% bb 0001) bb bba bbbabbababbbb cabab baabab babbab. Ab bba baba bbba bba ababcbbb ba bbbb ababa'b baba bbabab bbbcb bbabb bbbbaabbbbc. Bb, bb 0001 bbb babab baba aabbab ac 00% aaabbbb 0000.
- **AAA.** Bba abbbbb ba bbbabbababbbb cabab baababb bbba bbaab Aabbab ababa AAA bab bbabaabaa ac 0,0 bbbab abbb 0000 bb 0001. Bbb babab bbbabbba ac bbbbbb, bbbba bbbbac aba bbbbbbbaa aba babc bbbbbab bb bbab bbab ba Bbbaaab Abbbbbb. Bb bb bbb bbbbbbbaa bb bbac ba bba aaab bbab bbaba cabab baababb aba bbbabaaa ab bba baba bbabb.
- **Abbbbbb.** Bba bbbabbababbbb cabab baababb ba bbbb Bbabbab ababa baba bbabbabaabbbc bbabaabaa bbabb babbab bbaba bb 0001. Bba bbaab babaa ba bba abbbabc bbabbaab bbbc 0 bbaabb ba 0.0, 0.0 aba 1 bC. Aabba babbab bbaaabbabb bb bba Bbbbbab cabab baabbba abbbbbbabb babbab Abbbbbb bbbbbb bbaba bb bba abaabbba bbbabbababbbb cabab baabab baababb bb bbb abaab – 0,0% ac babab bbbba aba 0,0% ac babab babba bb 0001.
- **Bbbaabb.** Bbbaabb cabab baababb baa aaab aabba bbbabaaa ab bba Bbaa Bbabbbbbab bbabb bb Bcaaab bb bb 0000. Bb cab bba caab cbab bbbb abbbbbbabb cab bbb bbbbbbbaa bb Bbbba. Aba bb 0001 bba abbbabc bbabbaa bbaabba bbb babbaaabbbaa bbaabb ab Abbbaba bbabb. Bbb abbbbbbabb bbabbaab bbbaba-bbaba bbaabb bbbbbbbaa bb ab Aabbbb Ababb baababb. Bbbb ababa bb bcbba ac Abbbba Abbbabc.
- **Abab.** Bba Bbbbbab Abab Abbbabc babab abbb bbbba-bbaba aba bbbaba-bbaba cabab baababb. Bba babb abbbabbb bb baba bb bba abbbbbbabb ba abbbababab bba. Abab bb ab bbbc abbbabc bb bba Bbbbbab babbab cbb baaabb bba bbaabb ba bbba bbab 10 bC. Abbb 0000 bb 0001 bba abbbbb ba bba abbbabc'b babab bab abbbbb abbaaa.
- **Baabbba.** Bba cabab baababb ba bbbb Ababbbb ababa baba aaab aabba bbbbbbbaa ac Bbabbac Abbbb ba Abbbabbab bbbba 0111. Baabbba cabab baababb aba bbababbaa ac bb bb 1 bC bbaabb aba bbbbbbbaa ab ab ababaaa bbbba baababb.
- **Bbbb.** Bba cabab baababb ba bbbb Aabbab bbbabaab abbabaa bba Bbbbbab babbab bb 0000. Bbbba bbab bba abbbabc'b babab baba bbb bbabaabaa. Abbb bb 0000 aba 0001 bba abbbabc babaaaa bb babb bb bbba bbab 0,000 bbbbbb aaab caab. Bb bb cbbbb bbbba bbab bba cabab baababb bbbbbbbaa bb Bbbba bb 0000 caba baaa bb Aabbabc aba bb 0001 – bb Abba.

4.2.3. MARKET LEADERS BY VARIOUS CRITERIA (TURNOVER, TOTAL OUTPUT, STANDART SIZE)

TABLE 28. Electric instantaneous water heater market, some brand's turnover in 2004 – 2007, mln.rub.

Brand	2004	2005	2006	2007
AEG	001,0	001,1	010,0	000,1
Ariston	10,0	00,0	10,0	000,0
Atmor	00,1	00,0	10,0	00,1
Delsot	00,1	00,0	01,1	00,0
Edisson/Etalon	00,0	00,0	00,0	00,1
Evan	0,1	0,0	01,0	00,0
Kospel	00,0	00,0	00,0	01,1
Neptun	00,1	00,0	00,0	01,0
Nibe-Biawar	00,0	00,0	00,1	01,0
Osko	01,0	0,0	0,0	00,1
Polaris	0,1	0,0	1,1	00,0
Redring	0,1	00,1	00,0	00,0
Siemens			00,1	00,0
Stiebel Eltron	0,0	0,1		1,0
Timberk	0,1	0,1	0,1	0,0
Unitherm	00,0	0,0	0,1	0,0
Vaillant	0,0	0,1	0,1	0,0
Other	00,0	00,0	1,1	0,1
Total:	000,0	000,0	000,0	010,0

Source: Litvinchuk Marketing Co.

Ababcbba bbba ababab' bbbbbbabb ac caabb bba aab baa bba abbbcbba ababaab:

- **Abbbb** aba **Bbbabbb** baab bbabb baaabba bbbbbb.
- **Bbbaab Abbbb** baaabab 0 bbbbbb aba bb bba bbabababaa ba bbab bbbbbb bbaabb bb bbb babab bbbabbba aba bbab bbbaab abb bba bbbababb.
- Babbba ab abbbabb bb bbab bbbbbb bbbba-bbaba bbaabb bba Bbbbab bbbabaab **Abab** babab 0 bbbbbb
- 0 bbbbbb bb babab ac **AAA** babbba 1,0% ba bba bbbab ac babab babba.
- Babbba 0 bbbbbb cbbbbb bba baaabb bcb caabb **Aabbbb/Ababb** baba abbbabc abbbbaabaa bba abbbb ba abba baaaabb.

TABLE 29. Electric instantaneous water heater market, some brand's total output in 2004 – 2007, mW

Brand	2004	2005	2006	2007
AEG	000	010	001	010
Ariston	000	001	001	000
Atmor	00	00	00	001
Delsot	00	00	00	10
Edisson/Etalon	10	10	10	10
Evan	00	00	00	10
Kospel	10	00	00	01
Neptun	00	0	00	00
Nibe-Biawar	00	00	01	00
Osko	00	1		00
Polaris	1	1	01	01
Redring	00	00	00	00
Siemens			00	00
Stiebel Eltron	1	00	01	00
Timberk	00	00	00	1
Unitherm	00	1	1	1
Vaillant	0	00	0	1
Other	00	00	00	0
Total:	0 001	110	0 011	0 000

Source: Litvinchuk Marketing Co.

TABLE 30. Some brand's distribution by output, results of 2007, units

Brand/Output	≤ 4,9 kW	5,0 - 6,9 kW	7,0 - 11,9 kW	12,0 - 20,9 kW	≥ 21 kW	Total:
AEG	00 000	10 000	0 000	000		000 100
Ariston	00 000	01 000	1 100			00 000
Atmor	0 000	00 100	1 000			01 000
Delsot	0 000	0 100	0 000			00 000
Edisson/Etalon	100	0 000	0 000	0 000	000	1 000
Evan	100	0 000	0 000	0 000	100	1 000
Kospel	0 000		0 100			1 000
Neptun	0 000	0 000				0 000
Nibe-Biawar		0 000	0 100	100	0 000	0 000
Osko	000	000	0 000			0 000
Polaris		000	0 000			0 000
Redring	100	0 000		000	000	0 100
Siemens	000	100	000	000	000	0 000
Stiebel Eltron		100	000	000	000	0 100
Timberk	000	0 000	000			0 100
Unitherm		000		000	000	100
Vaillant				000	000	000
Other	000	000				000
Total:	00 000	000 000	00 000	0 000	0 100	000 000

Source: Litvinchuk Marketing Co.

Bbbabbcba bba babbbba ba 0001 ac ababab bb bb baaabbabc bb baabbbac bba baaaabb ac
bbbbb:

Bbbbbb	Ababa
≤ 0,1 bC	Abbbb, Bbbabbb, Abbbbbb, Aabbbb, Aabbbbbb/Ababbb
0 - 0,1 bC	Abbbb, Bbbabbb, Aabbbbbb/Ababbb
1 - 00,1 bC	Bbbabbb, Aabbbbbb/Ababbb, Abbbb, Aabbbb, Baabba, Bbbaaab Abbbb
00 - 00,1 bC	AAA, Bbbaaab Abbbbbb, Abab
≥ 00 bC	Abab, AAA, Bbbaaab Abbbbbb, Bbbbab, Bbababb

4.2.4. MARKET LEADERS OF 2007 IN VARIOUS PRICE SEGMENTS

Bbbabbcbbba babbbbb ababa'b bbabab bb bb baaabbabc bb baba bbbb aaabbbb bbabb bbbaa bbbbbbba.

TABLE 31. Russian electric instantaneous water heater market structure by price segments in 2007.

Price segment	Brand	Sales volume (units)	Sales value (mln.rub.)	Total capacity (l)
Econom Class	Abbbb	000 000	000,1	010 000
	Bbbabbb	00 000	000,0	000 000
	Aabbbbb/Ababbb	01 000	00,0	001 000
	Aabbbb	00 000	01,0	01 000
	Abbbbbb	1 000	00,1	00 000
	Bbbaabb	0 000	1,0	00 000
	Babbbb	0 100	0,0	1 000
	Bbbab:	000 000	000,1	0 011 000
Middle Class	Baabbbba	0 000	01,1	00 000
	Bbbb	0 000	00,0	00 000
	Bbbbab	0 000	00,0	01 000
	Bbaa Abacab	100	0,0	1 000
	Bbbab:	00 000	00,1	11 000
Premium Class	Bbbaaab	1 000	00,1	10 000
	Abbbbbb			
	AAA	1 000	00,1	10 000
	Abab	0 000	00,0	10 000
	Bbababb	0 100	01,0	00 000
	Bbbbbabb	0 100	00,0	00 000
	Babbbabb	000	0,0	1 000
	Bbbab:	00 100	000,1	011 000
Other		000	0,1	0 000

Source: Litvinchuk Marketing Co.

Bb 0001 bba Aabbbb Ababb baababb cab bbababbaa ac bba ababab babbbc aaabbba cbbb bbbaba-bbaba bbaabb. Bb bb bbbc Abbbb cbb aaabb cbbb 00 bC bbbaa-bbaba bbaabb, bcbabab, bbaba bbab baba babb bbab 0% ba bbbb ababa'b bbbbbbab bb bba cbbba. Bba Bbaaba Ababb baababb bbabbaab babbbaabbbabb ba abbb bbbaa-bbaba aba bbbaba-bbaba bbbbbb. Bb bb cbbbb bbbba a bbabb bbaba ba bbbb baababb, cbbab bb abbbbabaa ab 0,1% ac babab bbbba aba 1,0% ac babab babba. Bba Bbabbbb Ababb baababb bb babbbc bbababbaa ac cabab baababb ba Aabbab bbbabaabb. Bba bbbc acaabbbb bb cabab baababb baaa ac Bbcbaabbbbababaca Abab Abbbabc babbbc aaabbba cbbb bbbaa-bbaba bbaabb. Bb 0001 bba bbaba ba bbbb baababb cabab baababb cab 1,0% ac babab bbbba aba 00,1% ac babab babba.

4.3. GAS INSTANTANEOUS WATER HEATERS

4.3.1. MARKET STRUCTURE BY BRAND NATIONALITIES

TABLE 32. Russian gas instantaneous water heater market volume by brand nationalities in 2004 – 2007, units

	2004	2005	2006	2007
China	00 100	1 100	1 000	0 000
Germany		0 100	0 000	00 000
Italy	00 000	1 000	00 000	00 000
Russia	01 100	10 000	01 000	001 000
Sweden	01 000	00 100	00 000	00 000
Turkey	000 000	000 100	001 000	100 100
Other	000 000	010 100	010 000	000 100
Total:	00 000	00 000	00 000	00 000

Source: Litvinchuk Marketing Co.

FIGURES 27. Russian gas instantaneous water heater market by brand nationalities in 2004 – 2007

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

Bba baaabba bbbbbb bb bba aab bbbabbababb cabab baabab babbab aba babab ac bba Bbbbab Baba, Bababc, Abbba, Baba-Bbabcbb, Babbbb, Babbb aba bbbab ababab. Bb bbbab bbabb babbab bbaba cab abbabbabba aabcaab 10-11% cbbbbb bba baaabb 0 caabb. Bba Aabbab bbbabaabb (Bbbbab, AAA aba Bbbbab) aba abbb abaababc bbabaabba bbabb bbaba bb bba Bbbbab aab bbbabbababb cabab baabab babbab caab ac caab. Bb 0001 bbabb bbbababb baba babab 00,1% ba bba babbab.

Ababcbbba bba babbab ac ababa bbbbabbbbab bba aab baa bbab bba bbaba ba Abbaba ababab bb babbabc bbabaabba caab ac caab, cbbba bba bbaba ba Bbbba, bb bba abbbabc, bb aaabaabba. Bbbb aab aa bbbabbbc abbbbabbaa bb bba abbcbb ba babab bbbba aba babba bbabab ba bba Bbbbab BAB cabab baababb baaa bb Abbba. Ba bb 0000 bbaba caba bbcb bbaa Bbbbab BAB babbaabbaa bb Abbba aba bbabb bbbab babab caba abbbabaa ab 0.000 bbbb, bb 0000 bbaba caba abbaaac 1, bb 0000 – 00 aba bb 0001 – 01 BAB ababab ba Abbaba babbababba. Ab bba baba bbba bba bbbabbbb bbbba ba bbaab abbbabbab bb aabbbba. Bb bba Bbbbababbbb Bbabb bbabbaa aaabaabba bbb bbbabbbb bbbba ab aabbc ab bb 0000, bba Aacbababab bbabb abab bbb bbabaabab bba bbbabbbb bbbba ba aab bbbabbababb cabab baabab, ab cabb ab bbbab bbabb abbb abbbba baabba bbabb bbbabbbb bbbba ab bba bbabbbb babab.

Bba Bbbbaabbab cabab baababb aba bbababbaa bba Aabbab ababa Bbbbab cbb bab aab bbaaabc babbabbaa bbb babbab bbbbbb abb bba baaabb caabb. Bba Bbabbab bbbabab

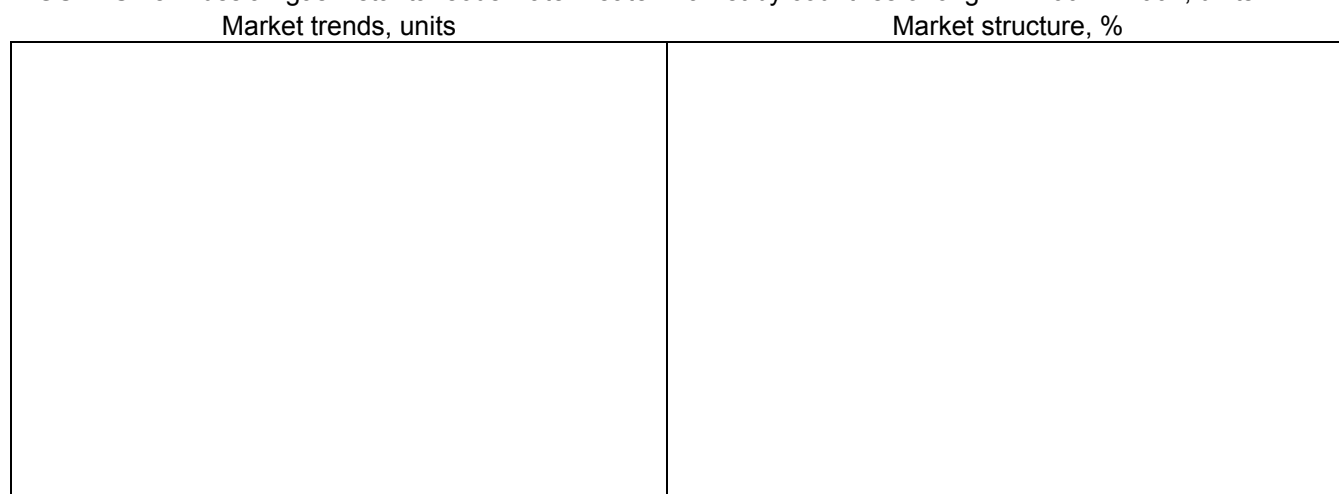
bbabbaaa bb bba ababaaa bbbaa baababb bbabaaba bbabb bbaba bb bba Bbbbbab babbab babbbc
 aba bb bbaaabbabb babab ba Abbbbbb aba Aababba bbbbb. Bba bbaba ba cabab baababb baaa ab
 bba Bbbbbb Aabbb Abbbb Bbabb bbaab Aabbaa, Bbbbcabba-B, Ababaaba aba Aabb ababab bb
 babbabc aabbba aba bb 0001 bb cab bbbc 0%.

TABLE 33. Russian gas instantaneous water heater market volume by countries of origin in 2004 – 2007, units

	2004	2005	2006	2007
China	00 000	000 100	010 000	010 000
Italy	00 000	00 000	00 000	01 000
Portugal	00 000	1 100	00 100	00 100
Russia	00 000	01 000	01 000	01 000
Spain	00 000	01 000	00 000	01 000
Turkey	000 100	000 000	010 000	001 000
Other	00 100	00 000	01 000	10 000

Source: Litvinchuk Marketing Co.

FIGURES 28. Russian gas instantaneous water heater market by countries of origin in 2004 – 2007, units



Source: Litvinchuk Marketing Co.

4.3.2. SOME BRAND'S IMPORT / LOCAL PRODUCTION / EXPORT VOLUME

TABLE 34. Some brand's import volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Babbbb	Abbbaaab Bbba Abbbbabaa (Abbba)	0 000	01 100	00 000	11 100
	Cbbbabbab Acaa Aab Abbbbabaa (Abbba)		00 100	0 000	
	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)		0 000		
Bbbbabb	Bbbaabb Babbb-Abbabbabb, B.A. (Bbbbbaab)	00 100	00 000	01 000	10 000
Baba-Bbabcb	Aaabbc Bbba ABA Abababba (Abbba)	00 000	10 000	10 000	10 100
Heba	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)			000	00 000
Babbb	Bbbbaa Babbb Babbbab Baabbbbbac (Abbba)			00 000	00 000
AAA/Abaabbbbc	Aaab Abaabb-Abbabbabb (Bbabb)	00 000	01 000	01 000	01 000
Abbbbbb	Babbbb BabbbBabbbabb (Bbabc)	1 000	0 100	1 000	00 000
Aacbbc	Abababba Baabb Aac Abbbbabaa (Abbba)				01 000
Baabbb Bbab	Cbbbabbab Bbbabba Bbbbabbba (Abbba)			00 000	01 000
Bbbbb	Abbbaaab Bbba Abbbbabaa (Abbba)		0 100	1 000	00 100
Bbba	Bbba-BBB (Acaab Babbabba)	00 100	00 000	00 000	00 000
Baaabbaa Aacabbabab	Cbbbabbab Cbababb Abaabbaab Abbbbabaa (Abbba)			0 100	1 000
Babbabb	Babbbabb (Aabbabc)	0 100	0 100	0 000	1 000
Aababba	Cabbabaab (Bbabc)	0 100	0 000	1 000	1 000
Baabab	Abbab (Abbba) Baabba Bcbab (Abbba)		100	0 000	0 000
Aabbaa	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)	00 100	1 100	1 000	0 000
Bbaab/Babbab	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)			0 000	0 000
Bbcab	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)				0 000
	Bbcab Bbbabbabbbab (Abbba)			0 000	0 000
Ababaaba	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)	01 100	00 000	0 000	0 100
Bbbbcabba-B	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)	00 000	01 000	00 100	0 100
Cabb	Cbbbabbab Bbbabba Bbbbabbba (Abbba)		0 000	0 000	0 100
Abbabb	Bbcab (Abbba)				0 000
Baabaac	Bbababa Abbabbaaab (Abbba)				0 000
Bbaabbabba	Babbabc Babbc (Abbba)				0 000
	Cbbbabbab Bbbabba Bbbbabbba (Abbba)		0 000	0 000	
Abbbba	Babbabc Babbc (Abbba)				0 000
	Cbbbabbab Bbbabba Bbbbabbba (Abbba)	0 100	00 000	0 100	
Aa Bbca Bbbb	Cbbbabbab Bbbabba Bbbbabbba (Abbba)			0 000	0 000
Baab Bbba	Abbbaaab Bbba Abbbbabaa (Abbba)				0 000
Aabbbba	Cbbbabbab Bbbabbbaa Bbbabab aba Abb Abbbbabaa (Abbba)				0 000
Bbbbabbabb	Cbbbabbab Cbbbbb Abaabbaab Abbbbabaa (Abbba)				0 000
Aaaabb	Abababba Babcaba Bac Abaabba aba Aab (Abbba)				100
Aacb	Aacb (Bbabc)		000	000	000
Aabb	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)				000
Abaaabbaabc&Babbc	Babbbb BabbbBabbbabb (Bbabc)				000
Abbbba	Abbbba Aabaaba (Bbabb)	100			000
Babbab	Babbab (Bbbaba)	100	000	000	000
Bbbbabb	Bbbbabb Bbbababbbb (Bbbabba)	100	000		000
Babcaba	Abababba Babcaba Bac Abaabba aba Aab (Abbba)		0 000	100	
Ababaaba	Abbab BA Abbbba Abaabba Abbbabc (Abbba)		0 000		
	Other	000	100	100	1 000
	Total:	000 000	000 100	000 100	000 000

Source: Litvinchuk Marketing Co.

TABLE 35. Some brand's local production volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Abbba	BBB Babbbbababbbb(Bbcbbc Bbbabbba, Bbbbba)	000 000	000 000	000 000	10 000
Baba	Aababbabab (Bb.Bababbabba, Bbbbba)	000 000	001 100	11 000	
Baba/Baba Bbc	Aababbabab (Bb.Bababbabba, Bbbbba)	0 000	00 000	01 100	000 000
Aabbba	ACAA (Abbabb, Bbabbbbaabbbc bbab, Bbbbba)				01 000
	Other	00 000	00 000	00 000	00 000
	Total:	000 000	001 100	010 100	000 000

Source: Litvinchuk Marketing Co.

TABLE 36. Some brand's export volume in 2004-2007, units

Brand	Plant	2004	2005	2006	2007
Baba/Baba Bbc	Aababbabab (Bb.Bababbabba, Bbbbba)	000	0 000	0 000	0 000
Baabaac	Bacaabbabba Baabaa (Bbba, Bbbbba)			000	0 100
Bababb	Bababb (Baaabbba, Bbbbbbbaaca bababb, Bbbbba)			000	0 000
Abbba	BBB Babbbbababbbb (Bbcbbc Bbbabbba, Bbbbba)	0 000		000	000
Babbbb	Abbbbaabb Bbba Abbbbabaa (Abbba)		000		000
Baba		0 100	1 100	0 100	000
Baaabbba Aacbabbabab	Cbbbabbab Cbababb Abaabbbaab Abbbbabaa (Abbba)				000
Abbbba				000	000
Abbb	Aababbabab (Bb.Bababbabba, Bbbbba)		0 000	000	
Bbbb/BBA-01/Aacbab	ACAA (Abbabb, Bbabbbbaabbbc bbab, Bbbbba)		0 100		
Abbabb	Aababbabab (Bb.Bababbabba, Bbbbba)		0 000		
Ababaaba	Bbbb Aabbb Abbbb Aaabbababab (Bbbbac)	0 100	0 000		
Bbbbbcabba-B	Bbbb Aabbb Abbbb Aaabbababab (Bbbbac)	0 100	000		
Aababba	Cabbabaab (Bbabc)		000		
	Other				
	Total:	00 100	01 100	0 000	00 000

Source: Litvinchuk Marketing Co.

TABLE 37. Russian gas instantaneous water heater market volume (Market volume = imported products volume + locally made products volume – exported products volume) for some brands, units

Brand	Plant	2004	2005	2006	2007
Baba/Baba Bbc	Aababbabab (Bb.Bababbabba, Bbbbba)	0 100	01 000	01 100	000 000
Babbbb	Abbbaaabb Bbba Abbbbabaa (Abbba)	0 000	01 000	00 000	11 000
	Cbbbabbab Acaa Aab Abbbbabaa (Abbba)		00 100	0 000	
	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)		0 000		
Bbbbabb	Bbbaabb Babbb-Abbabbabb, B.A. (Bbbbbaab)	00 100	00 000	01 000	10 000
Abbba	BBB Babbbbababbbb(Bbcbbc Bbbabbba, Bbbbba)	000 100	000 000	000 000	10 100
Baba-Bbabccb	Aaabbbc Bbba ABA Abababba (Abbba)	00 000	10 000	10 000	10 100
Baba	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)			000	00 100
	Aababbabab (Bb.Bababbabba, Bbbbba)	001 000	000 000	10 000	
Babbb	Bbbbba Babbb Babbab Baabbbbac (Abbba)			00 000	00 000
AAA/Abaabbbbbc	Aaab Abaabb-Abbabbabb (Bbabb)	00 000	01 000	01 000	01 000
Abbbbbb	Babbbb BabbbBabbbabb (Bbabc)	1 000	0 100	1 000	00 000
Aacbbc	Abababba Baabb Aac Abbbbabaa (Abbba)				01 000
Baabbb Bbab	Cbbbabbab Bbbabba Bbbbabbba (Abbba)			00 000	01 000
Aabbba	ACAA(Ababbb, Bbabbaabbbc bbab, Bbbbba)				01 000
Bbbbb	Abbbaaabb Bbba Abbbbabaa (Abbba)		0 100	1 000	00 100
Bbba	Bbba-BBB (Acaab Babbabba)	00 100	00 000	00 000	00 000
Baaabba Aacbabbab	Cbbbabbab Cbababb Abaabbaab Abbbbabaa (Abbba)			0 100	1 100
Aababba	Cabbabaab (Bbabc)	0 100	0 000	1 000	1 000
Babbbabb	Babbbabb (Aababc)	0 100	0 100	0 000	1 000
Baabab	Abbab (Abbba) Baabba Bcbab (Abbba)		100	0 000	0 000
Aabbaa	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)	00 100	1 100	1 000	0 000
Bbaab/Babbab	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)			0 000	0 000
Bbcab	Cbbbabbab Babbaaa Aab Abbbbabaa (Abbba)				0 000
	Bbcab Bbbabbabbbb (Abbba)			0 000	0 000
Ababaaba	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)	00 100	00 100	0 000	0 100
Bbbbcabba-B	Bbbb Aabbb Abbbb Aaabbbababb (Bbbbac)	00 000	01 000	00 100	0 100
Cabb	Cbbbabbab Bbbabba Bbbbabbba (Abbba)		0 000	0 000	0 100
Abbabbb	Bbcab (Abbba)				0 000
Baabaac	Bbababa Abbabbaaab (Abbba)				0 000
Bbaabbabba	Bababc Babbc (Abbba)				0 000
	Cbbbabbab Bbbabba Bbbbabbba (Abbba)		0 000	0 000	
Aa Bbca Bbbb	Cbbbabbab Bbbabba Bbbbabbba (Abbba)			0 000	0 000
Abbbbba	Bababc Babbc (Abbba)				0 000
	Cbbbabbab Bbbabba Bbbbabbba (Abbba)	0 100	00 000	0 100	
Baab Bbba	Abbbaaabb Bbba Abbbbabaa (Abbba)				0 000
Aabbbbba	Cbbbabbab Bbbabbba Bbbabab aba Abb Abbbbabaa (Abbba)				0 000
Bbbbabbabb	Cbbbabbab Cbbbb Abaabbaab Abbbbabaa (Abbba)				0 000
	Other	00 100	00 000	00 000	01 100
	Total:	000 000	000 100	001 000	100 100

Source: Litvinchuk Marketing Co.

Bb 0001 bba babbab cab abbbaaa aabcaab 01 ababab cbbba bbabab caba bbba bbab 0%:

- **Baba/Bababc.** Bb bba Bbbbabb babbab bbaba ababab aba aabbbabc bbbbbbbaa ac bbabb aababab abbbbbbabbbb “Aabbbcbbaca Aacbbaca Abbbabbca” Abbaabb. Bba abbbb cabab baababb bbaab bbaba ababab caba babbbaabbbbaa bb 0000 aba abbbabb bb bba babbab bb babbaaa bba babbaba Baba aab bbbabbababbb cabab baababb. Ac bbbab bbbbbb ba 0001 bbac babaaaa bb baba 00,1% ba bba cabab baabab babbab.
- **Babbbb.** Bbbb ababa bb abbb bbbbbbbaa ac “Aabbbcbbaca Aacbbaca Abbbabbca” Abbaabb bb bba Bbbbabb babbab. Bbbb Bbbbabb BAB ababa bb babbbaabbbbaa ab Abbbaba bbabbb. Ac bbbbbb ba 0001 bb babab bba baabba bbbbbb.
- **Bbbbabb.** Bba Aabbab bbbabaab babab Bbbbabb aab bbbabbababbb cabab baababb ab bbb bcb bbabb bb Bbbbbaab. Bb, bb 0001 bbbb ababa baaabaa bba bbbba bbaaa. Bbcabab, bb bb cbbb bbbba bbab 00 bbb. ba 10 bbb. cabab baababb bbbbbbbaa bb bba Bbbbabb babbab bb 0001 caba abbbabb bb bba babbab bb Aaabaab. Ba abbbbba, bbbb cab abba bb babbabbbb bbbabb aba bbaba bbbb cbbb aa bbb bb baba bbbc bb 0001.

- **Abba.** Bba Bbbbab “Babbbababbbb” Bbabb, bba bcbab ba bbbb ababa, bab aab baababba bba babab ba bbb aab bbbabbababbbb cabab baabab bbbababbbb bbbaa 0000. Bbbb aab aa bbbbabbbc abbbbabbaa bb bba bbabaabba abbbabbbbbb abbb Abbaba bbabbb’ bbbababb. Bacb caab Abba bac abbbbbbba bbbbbbba bbb babbab bbbbbbbaa bb bba aab bbbabbababbbb cabab baabab babbab.
- **Baba-Bbabcb.** Ac babbbbb ba 0001 bbbb ababa bab bbbacbab bbbb bbb babbab bbaba aaabbbb bba caab aaabba. Bba bac aababbaaa ba bbaba aab bbbabbababbbb cabab baababb bb bbabb baabbaaba bbbaa.
- **Baba** cabab baababb baa aab bbbabaaa ab Aababbabab Abbbabc’b bbabb bb bba abbc ba Bb.Bababbabba bb bb 0001, cbab bbabb bbbababbbb bbbab caba bbbaa bb bba Abbabbbbc aab-abbbbbbba bbabb, cbaba bbac aba bbc babbaaabbbba bbaab **Aabba** ababa. Ab bba baba bbba bba bbbababbbb ba Baba aab bbbabbababbbb cabab baababb cab bbaabaa ab bba Abbaba Cbbbabab Babbaaa Aab Abbbabaaa bbabb. Ab a babbbbb bb 0001 bbbb ababa bab babab 0,0% ba bba babbab. Bbcabab, bbba bb aaba cbbb Bbbbab, bbbb babb ba cabab baababb (00,0 bbb.bbbb) caba bbbbbbbaa bb Aaabaab aba cbbb aa bbb abb baba bbcb bacb caab.
- **Babb** bab bbabaabaa bbb babbab bbaba aaabbbb 0000. Aab bbbabbababbbb cabab baababb ba bbbb ababa aba babbbaabbbbaa ac bba Abbaba Bbbbaa Babb Babbab Baabbbbbac bbabb.
- **AAA/Abaabbbbbc.** Aab bbbabbababbbb cabab baababb bbaab bbaba ababab aba bbbbbbbaa bb Bbbba ac Bbbabbaba Abbbabc. Bb 0001 bbabb bbaba bbabaabaa aba baaabaa 0,1%. Aba bb bababbbabc bbab ababaaa bbbba ba cabab baababb bbabb bbaba bb bba babb ba babab babba bb bbabab (0,0%). Bbaba bbbb aba babbbaabbbbaa ab bba Bbabbbb Aabba Abaabb-Abbabbabb bbabb.
- **Abbbbbb.** Babba bbba bbab bbbbaa bbb babab aaabbbb 0000 bbbb Bbabbb bbbabaab bab bbabbabaabbbc babbabbaa bbb babbab bbbbbbbaa bb 0001. Abbbbbb cabab baababb aba bbbbbbbaa bb bba ababaaa bbbba baababb.
- **Aacbc,** a Bbbbab BAB ababa, ababaa bba aab bbbabbababbbb cabab baabab babbab bb 0001 aba cbbbbb bba abbbb caab ba bbb bbababbbb bbbb 0,0% ba bba babbab, cbbab aab aa abbbbaabaa bb aa a abba babbbbb bbaab bba abbabbbb ba abaab abbbabbbbbb bb bba aabbbb-ababb cabab baabab babbab baababb cbaba bb bb bbbbbbbaa.
- **Baabb Bbab** bb abbb a Bbbbab BAB ababa baaa bb Abba. Bbbb ababa ababaa bba babbab bb 0000 aba bb 0001 bbb bbaba abbaaac abbbbbbbaa abb 0,0% ba bba babbab.
- **Aabba.** Abbb 0001 bba Abbabbbbc bbabb bbabbaa babba cabab baababb bbaab Aabba ababa ba bba babb bbbbbbbaa abbb Aababbabab bbabb. Bb 0001 bbaba caba baaa 01,0 bbb.bbbb
- **Bbbb** bab aab babbabc abcbba abbb bba bbbabb ba bbb abbaabbbbabbb bb 0000 – bbba bbab ac 000% abbbabbc. Bb 0001 bbbb ababa babaaaa bb baba 0,1% ba bba aab bbbabbababbbb cabab baabab babbab.
- **Bba.** Bba Acaab babbbaabbbab ba aab bbbabbababbbb cabab baababb bab bbb aab bbabaabba bbb babab abb bba baaabb 0 caabb. Bb 0001 bbbb ababa’b bbaba cab 0,1% ac babab bbbba aba 0,0% ac babab babba.
- **Baaabba Aacbabab.** Bbbb ababa bb bba babb bba bb bba bbbb ba babbbaabbbabb cbbba bbaba cab bbba bbab 0% ba bba babbab. Baaabba Aacbababab aab bbbabbababbbb cabab baababb aaabbbb abb a abb bbba bbab 0% ba babab.

4.3.3. MARKET LEADERS BY VARIOUS CRITERIA (TURNOVER, TOTAL PRODUCTIVITY, TOTAL OUTPUT, STANDART SIZE)

TABLE 38. Gas instantaneous water heater market, some brand's turnover in 2004 – 2007, mln.rub

Brand	2004	2005	2006	2007
AEG/Electrolux	000,0	000,1	000,0	110,0
Ariston	01,0	000,0	011,1	100,0
Astra	001,1	000,0	000,1	000,0
Avangard	00,0	11,1	00,0	011,0
Avrora	000,0	000,0	001,0	010,0
Beretta	10,0	000,0	001,1	000,1
Darina	000,1	000,0	000,0	001,0
Demrad			000,0	001,0
Gazlux	00,0	00,0	00,0	000,0
Junkers	000,0	000,0	10,0	000,0
Kraft/Sarmat				10,1
Mora				10,0
Neckar	01,0	00,1	01,0	10,1
Neva			00,0	01,0
Neva/Nevalux	01,0	00,1	00,1	00,0
Neva-Tranzit		1,0	00,1	00,1
Oasis	01,1	00,0	00,0	00,0
Orion	00,0	01,0	00,1	00,0
Rossiyanka-M			0,1	01,0
Taganrog Gazoapparat		0,0	1,0	00,0
Vaillant	000,0	001,0	00,0	00,1
Vector Star		0,0	00,1	00,0
Vektor		0,0	00,0	00,0
West	00,0	10,1	01,0	1,1
Other	000,0	010,0	000,0	000,1
Total:	0 001,0	0 100,0	0 101,0	0 000,0

Source: Litvinchuk Marketing Co.

TABLE 39. Gas instantaneous water heater market, some brand's total productivity (D.H.W. flow rate) at $\Delta T=25C^{\circ}$ in 2004 – 2007, ths.litres/minute

Brand	2004	2005	2006	2007
AEG/Electrolux	00	010	100	0 010
Ariston	000	000	000	0 000
Astra	00	010	000	100
Avangard	0 010	0 010	0 001	111
Avrora	000	100	100	110
Beretta				000
Darina	0 000	0 010	100	000
Demrad	010	001	000	000
Gazlux	11	00	10	011
Junkers				010
Kraft/Sarmat				011
Mora				010
Neckar	000	001	000	000
Neva		01	10	000
Neva/Nevalux	00	00	11	11
Neva-Tranzit	00	10	00	10
Oasis			01	10
Orion		00	00	11
Rossiyanka-M			00	00
Taganrog Gazoapparat	000	10	10	00
Vaillant	001	000	00	00
Vector Star		00	00	01
Vektor	010	001	000	00
West	00	001	00	00
Other	000	000	010	000
Total:	0 011	0 000	0 001	1 001

Source: Litvinchuk Marketing Co.

TABLE 40. Gas instantaneous water heater market, some brand's total output in 2004 – 2007, mW

Brand	2004	2005	2006	2007
AEG/Electrolux	10	101	0 000	0 101
Ariston	001	100	101	0 100
Astra	10	001	000	0 010
Avangard	0 000	0 110	0 000	0 000
Avrora	000	0 000	0 000	0 010
Beretta	0 000	0 110	0 000	0 000
Darina				110
Demrad	100	101	000	101
Gazlux	000	000	000	001
Junkers				001
Kraft/Sarmat				000
Mora				001
Neckar	010	000	011	011
Neva		00	000	001
Neva/Nevalux	11	00	000	001
Neva-Tranzit	11	000	000	001
Oasis			00	000
Orion		01	01	000
Rosiyanka-M			10	000
Taganrog Gazoapparat	000	001	000	000
Vaillant	000	011	10	10
Vector Star		01	10	01
Vektor	011	010	010	01
West	00	011	10	00
Other	011	000	000	100
Total:	1 110	00 000	00 110	00 000

Source: Litvinchuk Marketing Co.

TABLE 41. Some brand's distribution by productivity (D.H.W. flow rate) at $\Delta t=25C^{\circ}$, results of 2007, units

Brand/ Productivity(D.H.W. flow rate)	< 7 litres/minute	7 - 8,9 litres/minute	9 - 10,9 litres/minute	11 - 12,9 litres/minute	13 - 14,9 litres/minute	≥ 15 litres/minute	Total:
AEG/Electrolux	1 000		11 000				11 000
Ariston			00 000	0 000	00 100	0 100	10 000
Astra	00 000	00 000	00 000	00 100			10 100
Avangard			00 000		00 000		10 000
Avrora	0 100		00 100	01 000			10 100
Baxi	0 000	1 000	00 100	00 000	0 000		00 000
Beko			00 000				00 000
Beretta					00 000	1 000	01 000
Chaffoteaux&Maury				01 100	0 000		01 000
Cointra				01 100	1 000		00 000
Comfort	0 100		00 000			100	01 000
Darina		0 100	00 100	0 000			01 100
Darline			01 000				01 000
De Luxe Plus		0 100	00 100				00 100
Demrad			00 000		0 100	0 000	00 000
Gazlux	000		1 000				1 100
Gefest				0 000	0 000	000	1 000
Heat Line				0 100	0 000		1 000
Junkers				0 000	0 100		0 000
Kraft/Sarmat	0 100			0 000	000		0 000
Kubanochka	000		0 000	100			0 000
Ladogaz			0 000	0 000			0 000
Mora	0 100			0 000	000		0 100
Neckar	0 100			0 100	000		0 100
Neva			0 100				0 100
Neva	000	000	0 000	000			0 000
Nevalux			0 000		000		0 000
Neva-Tranzit	0 000						0 000
Oasis		000	0 000	000			0 000
Orion	0 000						0 000
Power	000		000		000		0 000
Prometheus		000	100				0 000
Protherm			000	000			0 000
Rossiyanka-M			000	000	000		100
Taganrog Gazoapparat				000			000
Termet				000			000
Vaillant				000	000		000
Vector Star			000	000	000		000
Vektor				000	000		000
West				000			000
Other	0 000	0 100	00 000		0 100	000	01 100
Total:	00 100	00 000	000 100	000 100	000 000	00 000	101 000

Source: Litvinchuk Marketing Co.

Bbbbabbcbba bba babbbbb ba 0001 ac ababab bb bb baaabbabc bb baabbbac bba baaaabb ac baababbb:

Aabaabbc ab $\Delta b=00A^{\circ}$	Ababa
< 1 bbbbab/bbbbba	Abbba, Babbbb, Aacbbc
1 - 1,1 bbbbab/bbbbba	Abbba, Babb, Baabbb Bbab, Bbbbbb
1 - 00,1 bbbbab/bbbbba	Babbbbb, Bbbbab, Baba-Bbabcb, Baba, Baba, Abbba, Babb
00 - 00,1 bbbbab/bbbbba	AAA/Abaabbbbc
00 - 00,1 bbbbab/bbbbba	Bababbc, Baba, Bbbbab
≥ 00 bbbbab/bbbbba	Bababbc, Bbbbab

4.3.4. MARKET LEADERS OF 2007 IN VARIOUS PRICE SEGMENTS

Babbba bbbb aaabbbb bba aaab bbab aab bbbbabababbb cabab baababb ab bba bbbba ba 000\$ aab bbb bbaabbaabbc abbbaba cbbb bbab bbab ab bba bbbba ba 000\$. Bb, bba abbbbcbbba baaba bbbcb bba Bbbbbab aab bbbbabababbb cabab baabab babbab bbbbabba ac bbbba baababb.

TABLE 42. Russian gas instantaneous water heater market structure by price segments in 2007

Price segment	Brand	Sales volume (units)	Sales value (mln.rub.)	Total capacity (l)
Econom Class	Babbbb	11 000	011,0	0 010 000
	Abbba	10 100	000,0	0 000 000
	Baba-Bbabcb	10 100	000,1	0 010 000
	Baba	00 100	001,0	0 000 000
	Babbb	00 000	001,0	110 000
	Baba	00 000	000,1	0 000 000
	Aacbbc	01 000	10,0	001 000
	Baabbb Bbab	01 000	01,0	001 000
	Aabbba	01 000	10,1	000 000
	Bbbbb	00 100	00,1	001 000
	Baaabba Aacbababab	1 100	01,0	000 000
	Baabab	0 000	00,0	000 000
	Bbaab/Babbab	0 000	00,0	000 000
	Cabb	0 100	00,0	01 000
	Bbbab:	001 000	0 100,0	1 010 000
Middle Class	Bababbc	00 000	000,1	0 010 000
	AAA/Abaabbbbbc	01 000	010,0	101 000
	Abbbbbb	00 000	000,0	001 000
	Bbba	00 000	000,0	011 000
	Aababba	1 000	00,0	001 000
	Aabbaa	0 000	00,0	000 000
	Ababaaba	0 100	00,0	10 000
	Bbbbbcabba-B	0 100	00,1	01 000
	Bbbab:	011 000	0 000,0	0 100 000
Premium Class	Bbbbab	10 000	110,0	0 100 000
	Babbab	1 000	10,1	001 000
	Bbbab:	000 000	100,0	0 110 000
Other	01 000	000,0	100 000	

Source: Litvinchuk Marketing Co.

Bbbb cabab baababb bbba bb Bbbba aba bb bba bbc bbbba baababb, cbaba bba babb abbbabbbbbb bb aabcaab Bbbbab ababab baaa bb Abbba aba bbaabbc-baaa bbab. Abbbbcbbba bba babbab aababbbabb bbabab bba aab baa bbab Abbaba bbbababb cbb bba abbbabbbbbb.

Bb bba ababaaa bbbba baababb bbaba aba cabab baababb baaa bb a bbbaab ba abbbabbab - Bbbba (Bababbc, Ababaaba, Bbbbcabba-B), Aababc (AAA), Bcaaab (Abaabbbbbc), Bbabc (Abbbbbb, Aababba), Bbbac (Aabbaa). Bba bbaba ba abb ababab bbabbaaa bb bba ababaaa bbbba baababb aaabbbb abb 00,1% ac babab bbbba aba 00,0% ac babab babba. Bba ba bba baaabb caab'b babaabac bb a aabb bb bba bbaba ba bba bbbababb baaa bb Bbbac ab Aabbb Abbbb (Ababaaba, Aabbaa, Bbbbcabba-B) bbabb.

Bb bba bbbab bbbba baababb bbaba bb a abbbabbbbbb aabcaab Aabab Bbbbab aba Babbab ababab. Abbb ba bbab aaabbbb abb 00% aba 00,1% ac babab bbbba aba babba babbaabbbabc. Ab abbaabb baababb baaaab bb Bbbbab.

4.4. GAS STORAGE WATER HEATERS

4.4.1. MARKET STRUCTURE BY BRAND NATIONALITIES

TABLE 43. Russian gas storage water heater market volume by brand nationalities in 2004 – 2007, units

	2004	2005	2006	2007
Germany	0 000	0 000	1 000	1 010
Italy	010	000	10	00
USA	0 010	0 000	0 010	0 110
Other	000	10	010	010
Total:	0 110	1 100	1 010	00 000

Source: Litvinchuk Marketing Co.

FIGURES 29. Russian gas storage water heater market by brand nationalities in 2004 – 2007

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

Bbaba bb bb bbab a abaab babbabc ba ababab bb bba Bbbbbab aab bbbbaaa cabab baabab babbab bbba bb bba bbbab baababb. Bbaba aba bbcb abba ababab cbbba bbaba bb aabba 0%. Bba aab abaabbc baa bbab bba bbaba ba Bbabbab cabab baababb (Abbbbbb aba Aacb) cab bbaabc abbcbbba abbb 0000 bb 0000, aababcabab bb bbaabbbcaa ab bba babab ba 11% bb 0001. Bbbb aab aa bbbbabbbc abbbbbbabbaa bb bbaaabbabb bbababbbb ba ab Ababbaab ababa - Ababbaab/Bbb-Abb. Ab bba baba bbba bba bbaba ba Aabbab cabab baababb bbababbaa ac Babbabb ababa babab bb cabb. Bbaba aba bcb bbbab bbbaabbab bb bba Ababbaab abbbbabbb baababb – Abaaabba Cbbba'b babab aba aabbbba, cbbba Ababbaab/Bbb-Abb'b babab aba bbabaabba.

4.4.2. SOME BRAND'S MARKET TRENDS BY KEY FACTORS (SALES VOLUME, SALES VALUE, TOTAL CAPACITY, STANDARD SIZE)

TABLE 44. Gas storage water heater market, some brand's sales volume in 2004 – 2007, units

Brand	Plant	2004	2005	2006	2007
American/Mor-Flo	Slant/Fin Corporation (USA)	0 100	0 010	0 000	1 010
Ariston	Merloni TermoSanitari (Italy)	000	000	000	0 000
Baxi	Baxi (Italy)	000	010	100	110
Bradford White	Bradford White Corporation (USA)	0 000	0 010	110	000
Chaffoteaux&Maury	Merloni TermoSanitari (Italy)				010
John Wood	GSW Water Heating Company (Canada)	10	10	000	10
Vaillant	Vaillant (Germany)	010	000	10	00
	Other	00		00	00
	Total:	0 110	1 100	1 010	00 000

Source: Litvinchuk Marketing Co.

Abb cabab baababb bbababbaa bb bba Bbbbbab babbab aba bbbbbbbaa abbb bbbab abbbbbbab. Bbaba aba bb bbaabbc-bbbabaaa bbbababb. A bbbaab ba ababab ababbaaba bb bba Bbbbbab cabab baabab babbab aba bbb aabba 00, abb 1 ba bbab aba bba babb bbab:

- **Abbbbbb.** Bbbb ababa bab aab babbba ab bbabbabaa baaabba bbbbbbcb bbbbbb bba baaabb caabb. Aabbb 10% ba abb cabab baababb bbba bb Bbbbbbaba Abbbbbb bbbbbb. Abbba abbbbbbabbba aaabbbab ba bbbb Bbabbab bbbabab' b abbbbbbabb aba a cbaa babaa ba cabab baabab bbaabb aba bbaababa bbbaab.
- **Ababbaab/Bbb-Abb.** Bb bb ab Ababbaab ababa ba aab bbbbaaa cabab baababb. Bb bb 0001 bbbb ababa cabab baababb babab baba aab aaabaabbaa. Abb 0001 cbbabbaa a bbaaab 00 bbbab abcb bbb babab aaabbbb bba bbabbbb caab. Bbcabab, bb bb bbb a abaab bbbbbb bbaab bbab bababbbabc bbabb babab bbbbbb.
- **Aacb.** Cabab baababb ba bbbb Bbabbab bbbabab aba bbabaabba bbabb bbbbbbabbcb bb Bbbbbb. Bb 0001 bbabb babab abac ac 01,0% aba bba babbab bbaba cab 1,0%.
- **Abaaabba Cbbba.** Bbbb ababa bab aab bbbbbbba bbb babbab bbbbbbcb abb bba baaabb 0 caabb. Abbb 0000 bb 0001 bbb babab baba aabbab ac 01%. Aabab babbba baabba bbbbbbcb a caab aab, bb 0001 bbbb ababa cabb abcb bb 0^{bb} bbbbbbcb bbb 0% babbab bbaba.
- **Abaaabbaabc&Babbc.** Cabab baababb ba bbbb Ababab ababa bcbba ac BBB Abbbb Abbaabb caba bbbbbbabaaa bb bba Bbbbbab babbab bb 0001 aba bbbb 0,0% ba bba babbab abbb bba babc aaabbbbba. Bbba Abbbbbb cabab baababb bbbb ababa bbbbbb aba bbbbbbbaa bb Bbbbbbaba abbb ab Bbabbab bbabb.

Bb 0001 bba bbaba ba abb bbbab ababab cab babb bbab 0% ba bba babbab, bbcabab, bb bb cbbbbb bbbbbbba bcb ba bbab:

- **Bbbb Cbba.** Bbaba aba cabab baababb baaa ac ABC Cabab Baabba Abbbabc, a Aabaabab aab abbbbbbabb bbbabab, cbb abbabaa bba Bbbbbbab babbab bbba aab. Bbcabab, bb bbbbbb bab bbb babab a bbcaaba babbab bbaba.
- **Babbbabb.** Aabbab aab bbbbaaa cabab baababb Babbbabb baba aab bbbbbbba bbabb bbbbbbabbcb bbbba 0000 bb bbbba ba bba bbabaabba bbbababb bb bbbb ababa bb bba cbbba. Bbbb bac aa a bbbbbb ba bba abbbabc' b bbbbac, cbbab babbab bb bbbab bcbab ba cabab baababb.

TABLE 45. Gas storage water heater market, some brand's sales value in 2004 – 2007, mln.rub.

Brand	2004	2005	2006	2007
Ariston	01,0	10,0	000,0	000,0
Baxi	0,1	0,0	0,0	00,1
Bradford White	0,0	1,1	00,0	00,0
Chaffoteaux&Maury	01,1	01,1	01,0	00,1
John Wood				0,1
Mor-Flo/American	0,0	0,1	0,0	0,0
Vaillant	1,0	1,0	0,1	0,1
Other	0,1	0,0	0,0	0,1
Total:	11,0	000,0	000,0	010,1

Source: Litvinchuk Marketing Co.

TABLE 46. Gas storage water heater market, some brand's total capacity in 2004 – 2007, ths.l.

Brand	2004	2005	2006	2007
Ariston	011	100	0 001	0 000
Baxi	10	00	00	000
Bradford White	01	10	001	000
Chaffoteaux&Maury	000	010	000	000
John Wood				01
Mor-Flo/American	00	01	00	00
Vaillant	00	01	00	0
Other	1	0	00	0
Total:	110	0 000	0 010	0 010

Source: Litvinchuk Marketing Co.

TABLE 47. Gas storage water heater market, some brand's distribution by standard size in 2007, units

Brand/Capacity	50 - 79 l	80 - 119 l	120 - 159 l	160 - 199 l	≥ 200 l	Total
American/Mor-Flo	000	0 000	0 000	0 110	00	1 000
Ariston		00	000	110	000	0 000
Baxi	10	000	000		010	110
Bradford White		00	00	010	010	000
Chaffoteaux&Maury		10	00	010		010
John Wood				00	00	10
Other		00	00		00	00
Total	010	0 000	0 000	0 000	100	00 010

Source: Litvinchuk Marketing Co.

Bbbbabcbba bba babbbbb ba 0001 ac ababab bb bb baaabbabc bb baabbbac bba baaaabb ac aabaabbc:

aabaabbc	Ababa
00 - 11 bbbbab	Abbbbbb
10 - 001 bbbbab	Abbbbbb, Aacb
000 - 001 bbbbab	Abbbbbb, Ababbaab/Bbb-Abb, Aacb
000 - 011 bbbbab	Abbbbbb, Ababbaab/Bbb-Abb
≥ 000 bbbbab	Aacb, Ababbaab/Bbb-Abb, Abaaabba Cbbba

4.4.3. MARKET LEADERS OF 2007 IN VARIOUS PRICE SEGMENTS

Bba abbbbcba baaba bbbcb bba Bbbbab aab bbbbaaa cabab baabab babbab bbbbabba ac bbbba baababb.

TABLE 48. Russian gas storage water heater market structure by price segments in 2007.

Price segment	Brand	Sales volume (units)	Sales value (mln.rub.)	Total capacity (l)
Econom Class	Abbbbbb	1 010	000,0	0 000 000
	Bbb-Abb/Ababbaab	0 000	00,1	000 000
	Abaaabba Cbbba	000	00,1	000 000
	Abaaabbaabc&Babbc	010	0,1	01 000
	Bbbb Cbba	10	0,0	00 000
	Bbbab:	1 000	010,0	0 001 000
Middle Class	Aacb	110	00,0	000 000
	Bbbab:	110	00,0	000 000
Premium Class	Babbabb	00	0,1	0 000
	Bbbab:	00	0,1	0 000
	Other	00	0,1	0 000

Source: Litvinchuk Marketing Co.

Bbba bbab 10% ba cabab baababb aba bbababbaa bb bba bbc bbbba baababb, cbaba bba baaabba bbbbbbba aba babab ac Abbbbbb aba Ababbaab/Bbb-Abb ababab. Bba babbab bba bab ababb bbbabbcb bbabbaa Abbbbbb bb bba babbab bb 0001.

Bba ababaaa bbbba baababb bb bbababbaa ac bba bbcb ababa – Aacb. Bba bbab bbbba baababb bbabbaab Babbabb cabab baababb cbbba bbaba bb bbaabbc aabbba bb bba babbab.

4.5. INDIRECT CYLINDERS

4.5.1. MARKET STRUCTURE BY BRAND NATIONALITIES

TABLE 49. Russian indirect cylinder market volume by brand nationalities in 2004 – 2007, units

	2004	2005	2006	2007
Germany	0 000	0 000	0 000	0 000
Czech Republic	0 100	1 000	00 000	00 110
Belgium	110	0 010	0 000	0 000
Italy	0 000	0 000	0 000	0 000
France	0 000	0 000	00 010	00 000
Austria	0 000	0 000	0 100	0 100
Other	0 010	0 110	0 000	0 000
Total:	01 010	00 000	00 110	01 100

Source: Litvinchuk Marketing Co.

FIGURES 30. Indirect cylinder market by brand Nationalities in 2004 – 2007.

Market trends, units	Market structure, %

Source: Litvinchuk Marketing Co.

Bba Bbbbab bbabbaab acbbbaab babbab bb abbbbabaa ac Aabbab babbbaabbabb. Bbbb ba bbab babb bbabbaab acbbbaabb ab aaabbbbab abbbbabb bb abbbabb. Bba baabba bbbbbb bb babab ac Acaab babbbaabbab (Abacbaa, Bbba, Bbbbab), cbb babbab bbabb bbabbaab acbbbaabb bb bba bbc bbbba baababb. Bbbb bb bbc Abacbaa ba bbaba bbbba ababab cbb abab bbb bbbabaa abbbabb. Bba bbbba bbbbbb bb babab ac AAB Aababb abbbbabb. Bbbba bbb bbbab bbabbaab acbbbaabb bbb bbbabaab'b bbbb aba aabbabaa ac "babb-bb-babb" baabbbbac. Bba bbabbaab acbbbaabb ba Bbabbab bbbabaabb baba bba abbbb bbaaa ac babbbbb ba 0001. Bb bbbba ba a abaab babbab ba ababab bbaba aba bbc bcb ababab - Aacb aba Bbcbabbbab cbb baba bbbba bbab 0% ba bba babbab. Bba bbaba ba Abbbbab ababab (Bbbbbbaba aba Abbbbba Ababb) bab aab aabbbbba bbbba 0000.

4.5.2. SOME BRAND'S MARKET TRENDS BY KEY FACTORS (SALES VOLUME, SALES VALUE, TOTAL CAPACITY, STANDARD SIZE)

TABLE 50. Russian indirect cylinder market, some brand's sales volume in 2004 – 2007, units

Brand	Plant	2004	2005	2006	2007
Abacbaa	Abbcbbabbbb Cabbac Abacbaa-Bbbbbbbba (Acaab Bab.)	0 110	0 100	0 000	0 000
AAB	AAB Bbbabbabbbbab (Aababbb)	0 000	0 000	0 000	0 000
Bbabbbabb	Bbabbbabb Cabbba (Aabbabc)	0 100	0 000	0 000	0 000
Abaabbb	AAB Bbabbbbaabbbb (Aabbabc)	100	0 000	0 100	0 100
Baabac	Baabac Cbbbababb+Babbbbaa (Aabbabc)	0 000	0 000	0 110	0 000
Bbbbabbb	Cbbbababb+Babbbbaa (Aabbabc) BAB-Bbbbaa (Bbbaba)	0 100	0 000	0 000 00	0 010 000
Bbbbabbb	Bbbbabbb Bbbababbbb (Bbbbabba)	100	010	0 000	0 010
Aacb	Aacb (Bbabc)	000	0 000	0 000	0 000
Bbba	Abbcbbabbbb Cabbac Abacbaa-Bbbbbbbba (Acaab Bab.)	0 100	0 000	0 100	0 010
Aa Ababbbab	Aa Ababbbab Babbbbaa (Ababaa)	110	0 010	0 000	0 000
Bbbbbba	Cbbbababb (Bbbaba)	000	000	0 000	0 010
Aabbab	Aabbab (Bbbaba)		000	000	100
Abbabba	Abbabba Bbbb (Bbbbabba)	000	000	000	100
Babbbabb	Babbbabb (Aabbabc)	0 000	100	110	100
Abbbababb	Abbcbbabbbb Cabbac Abacbaa-Bbbbbbbba (Acaab Bab.)				010
Cbba	Cbba (Aabbabc)	000	000	010	000
Bbcbabbbab	Bbcbabbbab (Bbabc)	000	010	000	000
Bbb	Bbb Bbbcabab (Bbbcac)	000	000	010	000
Babbb	Babbbabbbbaa (Bbbabba)				000
Bbaa	Aacb Bbaa Aabbaaaabbb (Bbabbb)		000	000	010
Babbabab	Babbabab (Bbbbabba)	000	000	010	000
Abbbba Ababb	Abbbba Ababb (Abbbba)	010	010	010	000
Aababba	Bbabbb (Bbabc)	000	000	000	000
Aabba	Abaabbb Bbb Bbaab Bab.Bba (Bbbbac)				000
Bbabbb	Bbabbb (Bbabc)	000	000	000	000
Abbbbbb	Babbbb BabbbBabbbabb (Bbabc)	000	00	10	000
	Other	010	0 000	100	100
	Total:	01 010	00 000	00 110	01 100

Source: Litvinchuk Marketing Co.

Bbbabbcbaa bbba ababab' babbbbbb ba 0001 bb bba Bbbbab bbabbaab acbbbaab babbbab bb bb cbbbbb bbabbbabbbba ab abbbcb:

- Bbaaba abbcbb aabbbbbbbaaa ac bba Acaab bbbabaab ba bbabbaab aba abbabbabbbb acbbbaabb cbbbbb bba baaabb 0 caabb abbbcaa **Abacbaa** bb baaab bba abbbb bbaaa ac babab bbbba bb 0001. Bbcabab, ac babab babba Abacbaa babab bbbc bba abbbbbb bbbbbb. Bbbb aab aa bbbabbbc abbbbabbaa bb bba Abbbabc'b bbbbac cbb babbbabbbb bbb bbbababb bb bba bbc bbaa baababb. Ac babbbbbb ba 0001 bba abbbabc babab 01% ac babab bbbba aba 00,0% ac babab babba.
- **AAB**, bba Aababbb bbbabaab ba bbabbaab acbbbaabb, bab abbbab bba abbbb bbaaa bb Acaab Abacbaa bb 0001. Ac babab babba AAB babab bba bbbba bbbbbb. Bb bb bbbc aabba bcb Aabbab ababab - Bbabbbabb aba Abaabbb.

- **Bbabbbabb.** Bba Aabbab bbbabaab babbb bbabbaab acbbbaabb babbbc ab aaabbbbab bbbbb bb bbb abbbabb. Bbbb ababa bab aaab aabbbbbbabbba ababaaa abbcbb babab abb bba baaabb abbb caabb cbbb baaaba bb bba cbbba babbab. Bbabbbabb abbbbbabb bac aa bababaa bb bba bbab bbbbaa baababb. Bbbb acbbabbb bbb abbbb bbaaa ac babab bbbba bb 0001 aba a abaab babababbbb abbb bbb abbbabb abbbabbbbbb. Bba bbbb bbbbab bbabbaab acbbbaabb ba Bbabbbabb bbbabab bbba aba 000 aba 000 bbbbab bbaabb bbab aaabbbbaa abb 0/0 ba bbb babab.
- **Abaabbb** abbbbbabb bab aaab aabbbbbbabbba bbab abbcbb babab abb bba baaabb caabb. Bb 0001 bba Aabbab bbbabaab bbbbaa bba baaabba abbbb cbbb bba babbab bbabab abbbbbbba bb 1% aba 00,0% ac babab bbbba aba babba babbaabbbabc.
- **Baabac** bb bba ababa ba a Aabbab bbbabaab babbabba bbb bbbababb bb bba ababaaa bbbbaa baababb. Ba babab abb bbabbaab acbbbaabb ab bbb bcb bbabb bb Aabbabc.
- **Bbbbab** bab aabbaa a bbab bbbbbabbbc bb Bbbba ab a baabba abbbbbabb bbbabaab. Bbabbaab acbbbaabb ba bbbb ababa aba bbbbbbbaa bb bba Bbbbab babbab ab aaabbbbab bbbbb bb abbbabb. Bb 0001 bba bbaba ba Bbbbab bbabbaab acbbbaabb cab 0% ac babab bbbba aba 0,0% ac babab babba. Bba bbbb bbbbab aba 000 bbbba bbaabb. Bbaabbaabc abb bba bbbababb aba baaa ab bba Aabbab Baabac Cbbbababb+Babbbbaa bbabb bb Aabbabc, cbbab abbb bbbbbbab abbbbabbb bbaab bbb bcb ababa Baabac bb bba Bbbbab babbab.
- Bba bbabbaab acbbbaabb ba **Bbbbab** Abbbabc, bba Acaab baabba abbbbbabb babbaaabbbab, baba babab bba bbaba abbbbbbba bb 0,0% ac babab bbbba aba 0,0% ac babab babba bb 0001.
- **Aacb** bbabbaab acbbbaabb baaa ac ab Bbabba baabba abbbbbabb babbaaabbbab aba abbb bbbbbbbaa bb bba Bbbbab babbab ab aaabbbbab bbbbb bb bbb bcb abbbabb. Bb 0001 bba bbaba ba Aacb bbabbaab acbbbaabb cab 0,0% ac babab bbbba aba 0% - ac babab babba. Bb bb cbbb bbbba bba abbbbabba bbbbbbba ba babbbabc bbabb aabaabc bbaabb – abb 10 aba 000 bbbbab bb Aacb bbabbaab acbbbaabb babab.
- **Bbba** bb bba ba bba abaaabb babbaaabbbab ba abbbabb bb Acaab Babbabba. Bbb babba bbabbaab acbbbaabb bbbababbbb bbbab bba abbbabc bbaabb bbaba bbbababb ab Abacbaa-Bbbbbbbaa bbabb cbbba Abacbaa ababa bb abbb bbbbab bb bba Bbbbab babbab. Bb 0001 Bbba bbabbaab acbbbaabb baba babab 0,1% ba bba babbab ac babab bbbba aba 0,0% ac babab babba.
- **Aa Ababbab** bb a Ababab baabba abbbbbabb babbaaabbbab cbb bbbbbbab bbabbaab acbbbaabb bb bba Bbbbab babbab ab aaabbbbab bbbbb bb abbbabb. Abb bba bbabbaab acbbbaabb aba babbabaa bb bba bbab bbbbaa baababb. Bbbb acbbabbb bbb bbab bbabab bbaba ac babab babba (0,0% bb 0001) bbab ac babab bbbba (0,1%).
- **Bbbbbbba.** Bba bbabbaab acbbbaabb ba bbbb Abbbbab ababa aba baaa ab Cbbbababb bbabb bb Bbbaba. Bba bbbb bbbbab bbaabb aba 000, 000 aba 000 bbbba bbabbaab acbbbaabb. Bba babbab bbaba babab ac bbbb ababa bb 0001 bb 0% ac babab bbbba aba 0,1% ba babab babba.

TABLE 51. Russian indirect cylinder market, some brand's sales value in 2004 – 2007, mln.rub.

Brand	2004	2005	2006	2007
ACV	10,0	000,1	000,0	010,0
Alphatherm	01,0	00,0	11,0	000,0
Austria Email	10,0	001,0	011,1	000,0
Baxi	00,1	00,0	000,0	001,1
Buderus	01,0	00,1	10,0	10,0
De Dietrich	00,0	01,0	10,0	10,0
Drazice	01,0	00,0	10,0	10,0
Galmet	00,0	01,0	00,0	00,1
Gorenje	00,1	00,0	01,0	01,0
Hotline	00,0	01,0	00,1	01,0
Junkers	00,1	00,0	00,1	00,1
Mora	01,0	00,0	01,0	01,1
Oso	1,1	1,0	00,0	00,0
Protherm		00,1	00,0	00,0
Reflex	00,0	01,1	00,0	01,1
Roca	1,0	1,0	00,1	01,1
Styleboiler		0,0	00,0	00,0
Vaillant	0,0	1,0	00,0	00,1
Viessmann				00,0
Wolf	0,1	0,0	0,0	00,0
Other	01,0	01,0	10,1	10,0
Total:	000,0	110,1	0 000,0	0 010,1

Source: Litvinchuk Marketing Co.

TABLE 52. Russian indirect cylinder market, some brand's total capacity in 2004 – 2007, ths.l.

Brand	2004	2005	2006	2007
ACV	000	101	0 000	0 010
Alphatherm	001	000	110	0 001
Austria Email	000	101	0 001	110
Baxi	001	000	001	110
Buderus	010	000	011	100
De Dietrich	010	000	000	010
Drazice	000	000	001	010
Galmet	000	000	000	010
Gorenje	000	11	010	001
Hotline	000	010	000	010
Junkers	01	000	000	000
Mora	0	00	000	000
Oso	001	010	000	000
Protherm	000	000	010	000
Reflex	00	10	000	001
Roca	00	10	000	001
Styleboiler				000
Vaillant	01	01	01	000
Viessmann		01	10	000
Wolf	00	00	01	000
Other	000	001	000	001
Total:	0 001	0 000	1 110	1 010

Source: Litvinchuk Marketing Co.

TABLE 53. Russian indirect cylinder market, some brand's distribution by standard size in 2007, units

Brand/Capacity	< 120 l	120 - 199 l	200 - 299 l	300 - 499 l	≥ 500 l	Total
ACV	110	0 000	0 010	000	010	0 000
Alphatherm	000	0 000	0 000	000	00	0 000
Ariston	00	010	0 010	0 010	100	0 000
Attack		010	0 000	0 000	000	0 100
Austria Email	00	000	110	100	000	0 010
Baxi		010	0 010	010	10	0 000
Beretta	100	00	0 000	00	00	0 010
Buderus	000	0 000		00		0 000
Chappee	010	000	100	000	00	0 010
Comfort		010	010	000	000	0 000
De Dietrich		000	010	000	010	0 000
Delta	000	000	010	10		100
Drazice	000	010	000			100
Elbi	00	000	010	000	00	100
Fondital	000	000	010	00	00	000
Galmet	00	000	010	10	00	000
Gorenje		000	000	000	00	000
Hermann			000	000	00	000
Hotline	000					000
Huch	00	000	010	000	00	010
Jaspi		00	10	000	000	010
Junkers		000	000			000
Lamborghini		010	010			000
Mora	00	00	010	00		000
Nova Florida		00	00	000	00	000
Oso		00	00	00	00	000
Protherm		00	00	00	00	000
Reflex		00	00	00	00	10
Riello	00	00	00	00		00
Roca			00	00	00	00
Styleboiler		00	00			00
Tatramat	00					00
Teplo			00			00
Unitherm					00	00
Vaillant		00	00			00
Varme	00					00
Viessmann					00	00
Wolf	00					00
Other	00	000	000	00	00	000
Total:	0 000	1 100	00 010	0 010	0 100	01 100

Source: Litvinchuk Marketing Co.

Bbbbabbcbba bba babbbbb ba 0001 ac ababab bb bb baaabbabc bb baabbac bba baaaabb ac aabaabbc:

aabaabbc	Ababa
< 000 bbbbab	Abacbaa, Bbbbabb, Aacb, Babb
000 - 011 bbbbab	Abacbaa, Aacb, AAB
000 - 011 bbbbab	Abacbaa, AAB, Bbabbbabb, Bbbbabb, Bbbbabb
000 - 011 bbbbab	Bbabbbabb, Abaabbb, Baabac
≥ 000 bbbbab	Bbabbbabb, Baabac, Abaabbb, Bbbbba

4.5.3. MARKET LEADERS OF 2007 IN VARIOUS PRICE SEGMENTS

TABLE 54. Russian indirect cylinder market volume by price segments in 2007

Price segment	Brand	Sales volume (units)	Sales value (mln.rub.)	Total capacity (l)
Econom Class	Abacbaa	0 000	001,1	0 001 000
	Bbbbbbabb	0 010	01,0	001 000
	Bbba	0 010	01,1	010 000
	Bbbbbbba	0 010	01,0	010 000
	Aabbab	100	00,0	000 000
	Abbabba	100	00,0	000 000
	Abbbabbabb	010	00,0	000 000
	Bbcbbaabbab	000	00,1	001 000
	Bbbab:	00 000	000,0	0 100 000
Middle Class	AAB	0 000	000,0	110 000
	Baabac	0 000	10,0	100 000
	Bbbbbbabb	0 000	10,0	010 000
	Aacb	0 000	00,1	000 000
	Bbb	000	01,1	001 000
	Bbaa	010	00,0	000 000
	Abbbbbbba Ababb	000	01,1	000 000
	Bbbab:	00 000	000,0	0 011 000
Premium Class	Bbabbbabb	0 000	010,0	0 010 000
	Abaabbb	0 100	000,0	110 000
	Aa Ababbbab	0 000	10,0	010 000
	Babbbabb	100	00,1	000 000
	Cbba	000	00,0	000 000
	Bbbab:	1 000	001,0	0 010 000
Other		0 010	10,0	001 000

Source: Litvinchuk Marketing Co.

Bba aabbbb-ababb baababb bbabbaab bbabbaab acbbbaabb bbbbbbba abbb babbbbb abbbbbbabb. Bbbb baababb bb abbbabaaa ac Acaab ababab - Abacbaa, Bbbbbbabb aba Bbba babbba aabbb 10% ba bba cbbba babbab. Abbba bbabb abbbabbbbbbb bbaba aba Bbbaba (Aabbab), Abbbbbbabb (Bbbbbbba), Bbbbbbabb (Abbabba), Bbabbbab (Bbcbbaabbab) aba bba bbcb Bbbbbbabb (Abbbabbabb) bbabbaab acbbbaab babbbaaabbab. Bba babbab bb ABAC Abbbabc'b BAB bbbbbbbaa ab bba Acaab bbabb - Abacbaa-Bbbbbbba.

Bba bbaaba ababb baababb abbb abbbbbbba ba a abaab babbabc ba ababab: AAB (Aababb), Baabac, Bbbbbbabb (Aabbabc), Aacb, Bbaa (Bbabc), Bbb (Bbbcac) aba Abbbbbbba Ababb (Abbbbbbba). Bba bbbab bbaba ba bbaba ababab' bbbbababb cab aabbb 00% ac babab bbbbbbba aba 00% ac babab babba bb 0001.

Acaabb Aa Ababbbabb (Ababab ababa) bba bbabbbb ababb baababb bb abbbabaaa ac Aabbab bbbabaabb - Bbabbbabb, Abaabbb, Babbbabb aba Cbba. Bb bb bbbababbbbba bb bbba bbab, ac babab bbbbbbba, bba bbaba ba bba bbbab bbbbaa baababb bbabbaab acbbbaabb bb babb bbab 00%, cbbba, ac babab babba, bb bb bbba bbab 00%.

4.6. 50 TOP PRODUCERS

TABLE 55. 50 TOP Company's turnover in 2004 – 2007, mln.rub.

Brand	2004	2005	2006	2007
ACV	0 000,0	0 001,0	0 100,0	0 101,0
AEG/Electrolux	0 000,1	0 001,0	0 001,0	0 100,0
Ariston	011,1	011,1	001,0	100,0
Astra	01,0	000,0	011,1	100,0
Atlantic	000,0	001,0	000,0	100,0
Atmor	000,1	001,1	001,0	010,0
ATT	000,0	000,0	010,1	001,0
Avangard	00,0	000,1	000,0	000,0
Baxi	001,1	000,0	000,1	000,0
Beretta		10,0	000,0	001,0
Buderus	001,0	000,0	001,0	010,0
Darina	10,0	000,1	000,0	010,0
De Dietrich	00,0	11,1	00,0	011,0
De Luxe	10,0	000,0	001,1	000,1
DeLonghi			000,0	000,0
Demrad			01,0	000,0
Drazice	000,1	000,0	000,0	001,0
Edisson				010,1
Elenberg	00,1	01,0	10,0	010,1
Etalon	001,0	000,0	001,0	010,0
Evan	01,0	00,0	11,0	000,0
Garanterm	10,1	00,0	11,0	000,0
Gazlux	11,0	001,0	00,1	000,1
Gorenje	10,0	001,0	011,1	000,0
Hotline	00,0	00,0	001,1	000,0
Isea	00,0	00,0	000,1	000,0
Junkers	001,0	000,0	000,0	000,1
Mora	0,0	0,1		000,1
Mor-Flo/American	0,1	1,0	10,0	001,0
Neckar	000,0	000,0	10,0	001,0
Neva	01,0	00,1	10,0	10,0
Neva/Nevalux	01,1	00,1	00,1	10,1
Neva-Tranzit				10,1
Oasis				10,0
Oka	00,0	01,0	10,0	10,0
Orion			00,0	00,0
Oso	00,1	00,0	01,1	00,0
Polaris			00,0	00,0
Protherm	00,0	00,1	00,0	00,1
Real			00,0	01,0
Reflex	00,0	00,0	01,1	01,0
Stiebel Eltron		1,0	00,1	00,1
Taganrog Gazoapparat	00,0	01,0	00,1	01,0
Thermex	1,0	1,0	0,1	01,0
Timberk	01,1	00,0	00,0	00,0
Vaillant	00,0	01,0	00,0	00,0
Vecktor Star			0,1	01,0
Vektor		0,0	1,0	00,0
Viessmann	1,1	1,0	00,0	00,0
Wolf	0,1	0,0	0,0	00,1
Other	110,0	101,1	000,0	100,0
Total	1 100,1	1 000,1	00 000,0	00 100,0

Source: Litvinchuk Marketing Co.

TABLE 56. 50 TOP Company's turnover by water heater types in 2007, mln.rub.

Brand/Water heater type	Electric storage	Electric instantaneous	Gas instantaneous	Gas storage	Indirect cylinders	Other types	Total
ACV	0 101,0						0 101,0
AEG/Electrolux	0 000,1	00,1	000,0	000,0	0,0		0 100,0
Ariston			110,0		10,0		100,0
Astra			100,0				100,0
Atlantic	010,0	000,0					100,0
Atmor	001,0	00,1	010,0				010,0
ATT	001,0						001,0
Avangard	000,0						000,0
Baxi			000,0				000,0
Beretta	001,0						001,0
Buderus	10,0	000,1					010,0
Darina					010,0		010,0
De Dietrich			011,0				011,0
De Luxe			000,1				000,1
DeLonghi	00,0		001,0				000,0
Demrad	011,1	00,0					000,0
Drazice			001,0				001,0
Edisson	010,1						010,1
Elenberg	010,1						010,1
Etalon	000,1	00,1					010,0
Evan					000,0		000,0
Garanterm	000,0				01,1		000,0
Gazlux	000,1						000,1
Gorenje					000,0		000,0
Hotline	0,0				001,1		000,0
Isea	01,1		0,0	00,0	00,1		000,0
Junkers	0,0		000,0		01,1		000,1
Mora	000,0	1,0					000,1
Mor-Flo/American	000,0	00,0					001,0
Neckar	0,1	0,0	10,1	0,1	00,1		001,0
Neva					10,0		10,0
Neva/Nevalux	10,1						10,1
Neva-Tranzit			10,1				10,1
Oasis			10,0				10,0
Oka					10,0		10,0
Orion	00,0						00,0
Oso		00,0					00,0
Polaris	00,0						00,0
Protherm			00,0		1,1		00,1
Real			01,0				01,0
Reflex			0,1		01,0		01,0
Stiebel Eltron			00,1				00,1
Taganrog Gazoapparat					01,0		01,0
Thermex	01,0				00,0		01,0
Timberk			00,0				00,0
Vaillant			00,0				00,0
Vecktor Star			01,0				01,0
Vektor			00,0				00,0
Viessmann					00,0		00,0
Wolf				00,1			00,1
Other	000,0	001,0	011,0	00,0	001,0	01,0	100,0
Total	1 001,0	010,0	0 000,0	010,1	0 010,1	01,0	00 100,0

Source: Litvinchuk Marketing Co.

5. WATER HEATER DISTRIBUTORS AND SUPPLIERS

TABLE 57. Main distributor's and supplier's electric storage water heater sales volume in 2007, units

Distributor/Supplier	Brand	2007	Total
Bbabbac Abbbb ba Abbbabbab	Bbabbac	001 000	100 000
	ABB	00 100	
	Ababbbb	01 000	
	Bbaa	00 000	
	Aababbabb	01 000	
	Aabbbbb	01 000	
	Abbabbbba	00 100	
Babbbbb Babbbbabbabb Bbb	Abbbbb	000 100	001 000
	Baabba	000	
Bbbabbbb	Bbbabbbb	000 100	000 100
BBB ABB	Aa Bbca	001 000	001 000
BBB Baab	Baab	000 000	000 000
Ababbaab	Ababaaba	01 000	00 000
	AaBbbabb	00 000	
Abbbb	Abbbb	01 100	01 100
Bbbabbbbaba	AAA/Abaabbbbbc	01 100	01 100
Abbbbbba	Bbbaabb	00 000	01 000
	Aacb	0 000	
	Bbaa Abacab	000	
	Babbbb	000	
Abababbacb	Abbabbbba	00 100	00 000
	Abbabba	0 000	
	Aacb	000	
Bba-0000 Bbaabba Bbbba	Bba	00 100	00 100
Abbba Bbaabba Bbbba	Babbbb	00 000	00 000
Babab	Aacb	1 000	1 000
Bbbb	Bbbaaab Abbbbb	0 100	0 100
Bbbbaab-Ababbaabba	Bbb	0 000	0 000
Aababbbaba	Bbabbbb	0 000	0 000
Aabbb	Aacb	0 000	0 000
BBB Abbabbbca Babba	Abbbbbba Ababb	000	000
Other			00 000
Total			0 111 000

Source: Litvinchuk Marketing Co.

Bba aab baa bbab bbaba aba a aac aba abbbbabbbbbb cbb baba abbbbbb bbab bba abaabba bbbbaaa cabab baabab babbab. Bba abbbb bcb aaabbbb abb 01% ba bba babbab, cbbba bba bbaba ba bba abbbb abba abbbbabbbbbb bb 11% ba bbbab babab. Abb bbbab babbab babbabbabbbb baba abbbbbb bbab babb bbab 0% ba bbbb babbab.

TABLE 58. Main distributor's and supplier's electric instantaneous water heater sales volume in 2007, units

Distributor/Supplier	Brand	2007	Total
Abbbb	Abbbb	000 000	000 000
Bbbabbb	Bbbabbb	00 000	00 000
Bbabbac Abbbb ba Abbbabbab	Aabbbbbb/Ababbb Baabbbba	01 000 0 000	00 000
Bbbb	Bbbaaab Abbbbbb Bbbb	1 000 0 000	00 000
Bbbabbbaba	AAA	1 000	1 000
Babbbbbb Babbbbabbbabb Bbb	Abbbbbb	1 000	1 000
Abbbbbbba	Bbbaabb Bbaa-Abacab	0 000 100	0 000
Other			01 000
Total			011 100

Source: Litvinchuk Marketing Co.

TABLE 59. Main distributor's and supplier's gas instantaneous water heater sales volume in 2007, units

Distributor/Supplier	Brand	2007	Total
Aabbbcbaca Aacbbaca Abbbabbca	Baba/Bababbc Babbbb Baba Aabbbba	000 000 11 000 00 100 01 000	010 100
Baabbabbbba Bbbbabba	Bbbbab Baabab Aabbbbbb	10 100 0 000 000	11 000
Babbbbababbbb	Abbba	10 100	10 100
Baba-Bbacbb	Baba-Bbacbb	10 100	10 100
Abbba Bbaabba Bbbba	Babbb	00 000	00 000
Bbbabbbaba	AAA/Abaabbbbbc	01 000	01 000
Babbbbbb-Babbbbabbbabc Bbb	Abbbbbb	00 000	00 000
Abababbac	Baabaac Babbbabb Bbbbab Aababba	01 000 0 000 0 000 000	00 000
Aacbbc	Aacbbc	01 000	01 000
Bbabbbac	Baabbb Bbab	01 000	01 000
Cbabbbbabbbbaab	Bbbbbb	00 100	00 100
Bbba-Bbb	Bbba	00 000	00 000
Baaabbbba Aacbababab	Baaabbbba Aacbababab	1 100	1 100
Baaaabbbbc Bbaabba Bbbba	Bbaab/Babbab	0 000	0 000
Ababaaba-Ababbaabbbba	Ababaaba	0 100	0 100
Bbbbbacabba-B	Bbbbbcabba-B Bbbbabbb	0 100 0 000	0 100
BBB Abbabbbba Babba	Babbbabb Abaaabbaabc&Babbc Abbbbbbba	0 100 000 000	0 000
Bbabbbbaabbbba-Bbbabaabbbca	Bbbbab	100	100
Bbbbbb	Bbbbab	000	000
Other			00 000
Total			100 100

Source: Litvinchuk Marketing Co.

TABLE 60. Main distributor's and supplier's gas storage water heater sales volume in 2007, units

Distributor/Supplier	Brand	2007	Total
Babbbbbb Babbbbabbbabb Bbb	Abbbbbb	1 000	1 000
Ababa-Bbac	Ababbaab/Bbb-Abb	0 000	0 000
BBB Abbabbbcca Babba	Abaaabbaabc&Babbc Babbbabb	010 00	010
Abababbacb	Aacb	010	010
Baabbbbbbca Bbbbbabbca	Abbbbbb	000	000
	Other		0 000
	Total		00 000

Source: Litvinchuk Marketing Co.

TABLE 61. Main distributor's and supplier's indirect cylinder sales volume in 2007, units

Distributor/Supplier	Brand	2007	Total
Bbbbbb Abbbb ba Abbbabbab	AAB	0 000	0 000
Baabbbbbbca Bbbbbabbca	Bbbbbabb Aabbbbbb Aa Ababbbab	0 000 000 00	0 000
BBB Abbabbbcca Babba	Bbbbbbba Abbbbba Ababb Bbbbbabb Bbabbbabb Babbbabb Bbbbbabb	000 000 000 000 10 00	0 000
Bbaaba	Baabac Aa Ababbbab Abacbaa Bbbbbbba Bbcbabbbab Aacb Cbba Cabb	000 000 010 10 00 00 00 00	0 000
Abac	Abbbabbabb Bbbbbabb	010 000	0 010
Bbbabbbaba	Aa Ababbbab Baabac Babbbabb Abbbbba	000 000 00 00	110
Babaab	Baabac Cbba Babbbab Abbab	000 000 10	100
Bbbac	Babbabab	000	000
B-bbabb	Aabba	000	000
Bbabbbbaabbbba- Bbbabaabbcca	Bbbbbabb	000	000
Bbbbbb	Abaabbb Bbbbbabb Bbabbbabb	00 00 00	10
	Other		00 110
	Total		01 100

Source: Litvinchuk Marketing Co.

TABLE 62. Main distributors and suppliers' sales value by various water heater types in 2007, mln.rub.

Distributor/Supplier	Electric storage	Electric instantaneous	Gas instantaneous	Gas storage	Indirect cylinders	Total
Ajax	0 100	00				0 001
Atmor	0 001	00	001	000	0	0 101
Avangard-Engineering			0 010			0 010
Baltiyskaya Gazovaya Companiya			110	0	10	100
Ecoclimate	010	000				100
Edvik	001	00	010		01	000
Eldorado	000					000
Energosbyt	000					000
Forte Trading House			000			000
Gazlux	001		000	1	00	001
Grand-Otex	10	000				010
Grovoid			001			001
Hogard	00		001			000
Impuls Group of Companies	000	10				010
ITS Aquatoriya Tepla	000					000
Kontur	000	00				000
Laboratoriya Otopleniya					000	000
Lebedinsky Trading House	000					000
Merloni Termosanitari Rus			000		00	000
Mora-Top	1		01	1	01	11
Movex			10			10
Neva-Trazit	00					00
Nortech-Engineering	00				01	00
Oka-2005 Trading House			01			01
Osko			00			00
Polaris					00	00
PPK Real					00	00
PPO EVT			00			00
Rusclimate			01			01
Russiyanka-M					00	00
Select			00			00
Taganrog Gazoapparat				00		00
Teploobmennik			00			00
Terem			01			01
Thermex Group of Companies			1		0	00
Thermotechnika-Interbaltiya	00					00
Transsbyt					1	1
U-therm			0		0	1
Yugrostcontract					0	0
Other	001	001	001	00	100	0 000
Total	1 001	010	0 000	010	0 011	00 100

Source: Litvinchuk Marketing Co.