Marketing Research and Analysis of the Elevator Equipment Market in RF, 2005-2007

Description:
B2B Research Company has conducted a survey of the elevator equipment market in RF for the period of 2005-2007. The main part of the market is comprised by passenger elevators. This type of elevators is of greater demand in the market. Besides, some consumers try every trick to manage without goods elevators, for example, for this purpose they try to use passenger elevators with heightened lifting capacity, which are not destined for this and are not furnished with special elements.

Elevators consumption

Range segmentation

- Construction and investment companies involved in reconstruction and new construction of
  -- housing objects
  -- transport objects (railroad stations, airports)
  -- industrial buildings
  -- public buildings
- Assembling companies
- Exploiting companies

The choice of equipment first of all depends on architectural peculiarities of the building, regulatory and functional requirements. Therefore even as early as at the building designing stage they have to determine what elevator and what manufacturer to choose, since this is directly connected with the dimensions of the elevator shaft.

However, technical features of an elevator can hardly be always decisive. The approach to the choice of elevator equipment made by investment and construction companies performing their professional activities in the municipal sector is somewhat different from that used by companies involved in the construction of commercial real estate.

Demands placed on investment and construction companies involved in construction in the municipal sector are as follows: low price for shelter, high speed of construction. Consequently, companies prefer using reliable suppliers of inexpensive home-made equipment that can efficiently respond to possible changes or look for other possibilities.

As for commercial real estate, technical parameters of the equipment and its appearance (which is often not standard but designed especially for a unique project) are vital factors, whereas the cost of equipment is of secondary importance.

Factors influencing the elevators market development, prognosis
Experts note the two main factors to influence the elevators market development in Russia: volumes of residential construction and growing deterioration of elevator equipment, which requires modernization or replacement of old elevators.

Modernization of old elevators began several years ago only. This contributes to the appearance of small regional companies that specialize in assembling a modernization set from constituent parts procured from the manufacturing plant. A modernization set allows the consumers to save money due to the purchase of only obligatory parts rather than the whole elevator. At the same time, the quality and safety of such elevators are in no way lower.

Research methodology:
1. Gathering and analysis of secondary sources of information:
- Gathering and analysis of state statistics data provided by the Federal Customs Service of RF, Federal State Statistics Service of RF;
- Monitoring of mass media: federal, regional and specialized printed editions;
- Specialized databases;
- Industry statistics;
- Internet-sources: market participants' web-sites, specialized web-portals, etc.;
- Data provided by rating agencies;
- Searching work based on inquiries at infrastructure enterprises of the investigated market (marketing agencies, servicing markets, expert companies, independent experts, analytical companies, etc.).

2. Expert interviews with market participants: manufacturers, importers, distributors, representatives of associations/ unions, specialized mass media, industry institutes, independent industry experts.

Contents:
- Project characteristic
- General market analysis
  -- Current state of the elevator equipment market
  -- Market development factors
  -- The main threats of the market
  -- Distribution structure in the market. Description of main distribution channels
- Supply structure in the market
  -- Market volume and dynamics of its changes
  --- Shared distribution of the Elevators market volume as regards manufacturers (brands), 2005-2006
  --- Shared distribution of the Elevators market volume as regards the first level of segmentation, 2005-2006
  --- Shared distribution of the Elevators market volume as regards product origins (home-made/imported), 2005-2006
  -- Volume of local production in the market and dynamics of changes
  -- Volume of the Elevators export and dynamics of its changes
  -- Volume of the Elevators import and dynamics of its changes
- Analysis of market segments
  -- Passenger elevators
  -- Goods elevators
- Demand and consumption structure
  -- Main consumer groups
  -- Criteria for choosing Elevators
  -- Model of making a decision on the choice of an elevator equipment supplier
  -- Prognosis of the demand for elevator equipment
- Prospects for the market development (conclusions and prognoses for all the previous sections)
- Profiles of players
  -- Profiles of domestic manufacturers
  --- Karacharovsky Mekhanichesky Zavod, OJSC
  --- Shcherbinsky Liftostroitelnny Zavod, OJSC
  --- Mogilyovliftmash, Republican Unitary Enterprise
  --- MEL, OJSC
  --- URALSKY LIFTOSTROITELNY ZAVOD, OJSC
  --- Omsky Zavod Podyomnykh Mashin, Federal State Unitary Enterprise
  -- Profiles of international manufacturers
  --- KONE
  --- OTIS
  --- OTIS-LG ELEVATOR (Sigma)
  --- Thyssen Krupp Elevator
  --- Shinfielder Holding Ltd
- Profiles of distributors
  --- Roslift, CJSC
  --- SP Podyom, CJSC
APPENDIX 1. Macroeconomic indicators

Tables
- RF Elevators market volume* in 2005-2007, units
- Elevators market volume and shared distribution as regards manufacturers (brands) in RF, dynamics, 2005-2007
- Volume of the Passenger elevators and Goods elevators segments, dynamics, units, 2005-2006
- Elevators market volume and shared distribution as regards product origins in RF, dynamics, 2005-2007
- Volume of the local Elevators production as regards RF manufacturers, dynamics, 2005-2007
- Volume of the Passenger elevators and Goods elevators segments in RF production, dynamics, units, 2005-2006
- Elevators export volume and shared distribution as regards the second level of range segmentation in RF, 2005-2006, and 1st quarter of 2007, units

Diagrams
- Dynamics of the Elevators market volume, 2005-2007, units
- Dynamics of the Elevators market volume, import, export, local production of Elevators, 2005-2007, units
- Shared distribution of the Elevators market volume as regards manufacturers (brands) in physical terms, 2007
- Shared distribution of the Elevators market volume as regards the first level of range segmentation, 2005-2006, units
- Shared distribution of the Elevators market volume as regards product origins in physical terms, 2005-2007
- Dynamics of the local Elevators production, units, 2005-2007
- Shared distribution of the Elevators local production volume as regards manufacturers, in physical terms, 2007
- Shared distribution of elevators in RF as regards the first level of range segmentation, in physical terms, 2005-2006
- Export dynamics, 2005-2007
- Export structure as regards type of elevators (goods/passenger), 2005-2007
- Dynamics of the Elevators market volume, 2005-2007, units

Pictures:
- Market structural map
- Main product distribution chains

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