Marketing Research and Analysis of the Russian Elevator Equipment Market, 2005 – 1st Half of Year 2008

Description: B2B Research Company has conducted a market research and a review of the Russian elevator equipment market.

The elevator equipment market was characterized by rather high growth rates (about 15%) at the end of the 1st half of year 2008.

The main factors to stimulate the elevator market development were a growing demand for these products due to the deterioration of the country's elevator fleet, as well as due to the increasing volumes of residential, office and cottage multi-storied construction and toughened requirements to qualitative characteristics of elevators. However, the existing unstable economical situation in the world, according to the experts, may lead to the reduction in the elevator market volume in Russia.

According to the predictions, by year 2010 the elevator market might reduce by over 50% in comparison with the final indicators of year 2008.

The main part of the market (over 80%) 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.

Domestic manufacture traditionally covers a larger share of the elevator market in physical terms. The share of home-made products was about 85% in 2006-2007. The prevalence of home-made products in the Russian market is mainly reasoned by their lower cost in comparison with imported analogs. Residential construction sector predominantly uses home-made elevators. Moreover, step-by-step renovation of the elevator equipment fleet, which is worn-out by more than 60% in Russia, is implemented with the use of home-made elevators.

This research highlights all aspects of the Russian elevator equipment market:

- General characteristic of the market and adjacent markets;
- Market structure (including production volumes and export-import volumes, positions of key players, price segmentation)
- Development trends, historical data and forecast
- Review of distribution systems
- Profiles of key market players
- Consumer analysis

Research goal
To evaluate the current state of elevator equipment market.

Range segmentation

1. Construction and investment companies involved in reconstruction and new construction of information:
   - housing objects
   - transport objects (railroad stations, airports)
   - industrial buildings
   - public buildings
2. Assembling companies
3. 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.

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.

Available Russian version – now
Available English version – 6 working days

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