



1.Edition 2007-02

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Dipl.-Ing. Winfried Hamich

## **KWD Market + Charts: “Plumbing&Heating in Russia, Eastern Europe and Turkey 2007”**

( Belarus, Bulgaria, Czech, Estonia, Hungary, Lithuania, Latvia, Poland, Romania, Russia, Slovakia, Turkey, Ukraine)

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**Redaktion:** Informationszentrale Kunststoffe / KWD  
Verlagsbüro Ch. Hamich  
Jahnstrasse 57

D-64285 Darmstadt  
[email: kwd-online@kwd-online.de](mailto:kwd-online@kwd-online.de)

Telefon: +49.6151.61848  
Telefax: +49.6151.61548  
[www.kwd-online.de](http://www.kwd-online.de)

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## Preface

**Global marketing** is also increasing in importance for plumbing & heating system suppliers. In a narrower context, this also includes manufacturer of pipes and fittings as well as the entire field of measurement and control systems which extends right up to suppliers of renewable energy systems (solar, wind power, biomass), modern heating systems and last but not least manufacturers of insulation, pipe insulation and fire protection systems and mounting systems.

We are increasingly seeing that North America and China (not to mention South America, South Africa, Australia, India and eastern Asia) will only provide **western and central European countries** with some of their **future markets**. Instead, potential in the medium term will lie in eastern Europe, Russia, the former Russian states and also Turkey, Iran, the Arab Emirates and North Africa. Once hostilities cease, Iraq, Israel, Lebanon and Palestine will of course also come on line.

Our task then is to at the very least roughly sketch out some key figures and volumes for underfloor heating, radiator connection systems and (domestic) sanitary systems for **eastern Europe, Russia and Turkey**.

Some initial trusted data can be taken from **housing new builds** and renovation work organised to a greater or lesser extent by the state. Also let's not forget the grey zone of renovation and total refurbishment in the private housing building sector and the fact that the clients in this sector are increasingly able and willing to pay more.

There are virtually no actual market figures. Tenants, home owners, installation companies and the sanitary/heating/air conditioning trade still have a whole host of organisational and other problems on their minds.

**This attempt at a provisional estimate of the potential market and volumes involved is** therefore based solely on the few producing companies in each of the countries in question and the large number of importing system suppliers, pipe, fitting and component manufacturers, the importing sanitary, heating and air conditioning wholesale trade and their agents.

The basic recognised **problem** here relates to the gradual opening up of eastern European markets. German manufacturers have known exactly what volumes they have been supplying to say Austria, but not what proportion of this has been forwarded on to Hungary etc. The same applies to the Baltic States, for example. For whatever reason, these often simply acted as transit stations for Belarus, Russia and other countries.

**Turkey** may well be a very interesting export market for high-quality systems and components for west European manufacturers. But at the same time, there is an atmosphere of departure in Turkey, particularly for plastic pipes which are exported to eastern Europe, Russia and further eastwards.

We have **enclosed an address section** with this attempt at a market study. We produced this to the best of our knowledge. It basically comprises 2 groups: subsidiaries or partners of importing manufacturers and suppliers, and companies which came to the public's attention through their presence at trade fairs and exhibitions.

Since we have been collecting data on these **companies for more than 5 years** in a more or less systematic fashion, the details for some of them will certainly be out-of-date (especially old phone numbers since the networks have often been fully changed over). Changes in ownership will have resulted in new names and due to the disproportionate costs involved we have not been able to check on those companies for which we have no online details.

Despite all this, we were asked to **enclose the address findings with this study** as many companies will otherwise have nowhere to start in their attempt to get a foothold on the market.

Since this first attempt is based on a very small volume of information, we have also enclosed **all the other tangible information** with the country overviews. These are mainly contributions from the pool at **the German Office for Foreign Trade, Cologne** and our English-language online information service **KWD-Globalpipe**. The sources of these contributions and a few others are given along with the texts.

There are also one or two other studies in English which detail the pipe market, and sometimes also the heating & plumbing sector, in eastern Europe and Russia. Unfortunately, these summaries are usually based on the details of importing manufacturers of raw materials and are only given in tons. Values are sometimes also included but they have little meaning for the small pipe market and heating & plumbing systems under investigation here. It would of course be totally absurd for example to combine the tonnage figures for district heating and heating pipes under one item.

The few **statistical details** available from the individual countries for windows, fittings and construction materials are striking but of no help for the market sector we are concentrating on. **We would like to express our thanks to the many subscribers of kwd-globalpipe** who have provided us with important information and most especially **pipe manufacturers for the volume figures they have given us**. We have also taken into account information on other construction sectors and energy systems if we felt that it helped to achieve a better appreciation of the market. We would be grateful for any comments, corrections or suggestions.

Darmstadt, 23.2.2007

Dipl.-Ing. Winfried Hamich, kwd-globalpipe

**1420. ONNINEN Russia**

Block 6, 6, Stroiteley st.  
RUS- Moscow, 119311, Russia

Telefon +7-495-792 3100  
Telefax +7-495-792 3109  
E-Mail office@onninen.ru  
Internet http://www.onninen.ru

REGISTER

1. NAVAL
2. REHAU Systems
3. UPONOR Systems
4. Saint-Gobain Pipe Systems
5. LABKO
6. SANHA Fittings and valves
7. Outokumpu Copper pipes
8. Tiemme Fittings
9. Henco Multilayer Pipe
10. Grundfos Pump Technology
11. Danfoss-thermostats
12. Purmo radiators
13. ORAS Armaturen
14. Ridgid Tool Werkzeuge
15. Wirsbo Quick & Easy (Q&E)
16. Wirsbo PE-Xa Systems
17. VALOX

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems
- Hydronic floorheating
- Multilayer pipes/ Sandwich pipes
- Air conditioning
- Drainage systems

COMPANY IS (GB)

- Wholesaler/ Stockist/ Plumber's merchant

COMPANY PROGRAMME (GB)

- Taps and valves for heating and hot water installations
- Pipe connections for floorheating and radiators

**1421. OPTIMA Russia**

Bld.2, 3, Volgogradsky prospect  
RUS- Moscow, Russia

Telefon +7-495-956 1086  
Telefax +7-495-956 1086  
E-Mail office@gfrus.ru  
Internet http://www.gfrus.ru

REGISTER

1. CALO-bloc Wärmespeicher
2. Sanitary engineering equipment
3. Water Pipeline
4. Heating products

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems

COMPANY IS (GB)

- Branch, office

**1422. OSKO**

28/60 Nikoloyamskaya str  
RUS- Moscow, 109004, Russia

Telefon +7-95-502 9915  
Telefax +7-95-502 9916  
E-Mail osko@osko.ru  
Internet http://www.osko.ru

REGISTER

1. STIEBEL ELTRON
2. Grundfos Pump Technology
3. Buderus Boiler

COMPANY IS (GB)

- Exclusiv importer

COMPANY PROGRAMME (GB)

- Heating boilers, water heaters,
- Control technology and equipment

**1423. Pipelife Repr. Office Moscow**

Floor 2, 11, Chaplygina st.  
RUS- Moscow, 105062, Russia

Telefon +7-495-980 7941  
Telefax +7-495-980 7942  
E-Mail info@pipelife.ru  
Internet http://www.pipelife.com

REGISTER

1. PIPELIFE Systems

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems

PRODUCER OF (GB)

- Plastic pipes (water, gas, drainage)

COMPANY PROGRAMME (GB)

- Gas fittings and pipes for domestic installation

OTHER ACTIVITIES (GB)

- Other pipes

**1424. PLASTFITING (AKER KALIP VE IMALAT SAN. LTD STI)**

33B, Verkhnie Polya st.  
RUS- Moscow, Russia

Telefon +7-495-960-2076  
Telefax +7-495-359 5774  
E-Mail plasfit@plasfit.ru  
Internet http://www.plasfit.ru

REGISTER

1. PLASTFITING PPRC Fittings
2. Sewage Pipes and Fittings
3. PPRC fittings
4. Extrusion lines PP-Pipes

PRODUCER OF (GB)

- Plastic pipes (water, gas, drainage)

COMPANY IS (GB)

- Manufacturer

**1425. POLYMERS OF XXI CENTURY**

2OG, Berezhkovskaya emb.  
RUS- Moscow, 123995, Russia

Telefon +7-495-540-9117  
Telefax +7-495-540-9118  
E-Mail polymer@liral.com  
Internet http://www.tdplastic.ru

REGISTER

1. Unplasticised PVC Pipes
2. Plastic coated metal pipes
3. Sewerage pipes

PRODUCER OF (GB)

- Plastic pipes (water, gas, drainage)

- Conduits for cables and pipes

OTHER ACTIVITIES (GB)

- Other pipes

**1426. PREMIERSTROYPLAST**

15, Rochdelskaya st.  
RUS- Moscow, 123022, Russia

Telefon +7-495-252 6985  
Telefax +7-495-255 6854  
E-Mail info@comap-ppsp.ru  
Internet http://comap-ppsp.ru

REGISTER

1. manifolds
2. Comap-Armaturen
3. Comap-products
4. Heating technology
5. Water supplying systems

COMPANY IS (GB)

- Wholesaler/ Stockist/ Plumber's merchant

COMPANY PROGRAMME (GB)

- Taps and valves for heating and hot water installations

- Pipe connections for floorheating and radiators

**1427. PROJECTCONVENT Joint Stock Comp. Heating, Ventilation & Air-Conditioning.**

46/2 Dmitrovskoye shosse  
RUS- Moscow 127238 Russia

Telefon 095-482 69 29  
Telefax 095-482 44 58

REGISTER

1. Unicolor Verpreßsystem
2. UNIPIPE 5-Schichten-Verbundrohr

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems

- Hydronic floorheating

COMPANY IS (GB)

- Branch, office

**1626. IMI INTERNATIONAL**

V. Khvoiky Str. 18/14  
UA-04080 Kyiv, Ukraine  
Telefon +380-44-586 4961  
Telefax +380-44-586 4962  
E-Mail imi@imi-international.com.ua  
Internet <http://www.imi-international.com.ua>

REGISTER

1. IMI Fittings
2. IMI Yorkshire Copper Tube
3. Copper Pipes
4. Copper fittings
5. Thermostats
6. Balancing Armature
7. Valves
8. 3-way valves
9. Flow controllers

COMPANY IS (GB)

- Wholesaler/ Stockist/ Plumber's merchant  
- Branch, office

COMPANY PROGRAMME (GB)

- Taps and valves for heating and hot water installations  
- Pipe connections for floorheating and radiators  
- Control technology and equipment

**1627. INSTALPLAST-KHV**

Lvivska Str. 163  
UA-81500 Gorodok, Ukraine  
Telefon +380-3231-322 19  
Telefax +380-3231-322 94  
E-Mail hortica@gorodok.lv.ukrtel.net  
Internet <http://www.iplast.com.ua>

REGISTER

1. Hot & Cold Water Systems
2. tubes for optic-fibrous cables
3. Cable duct systems
4. PE pipes 20-1200 mm

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems  
- Hydronic floorheating  
- Drainage systems

PRODUCER OF (GB)

- Conduits for cables and pipes

COMPANY IS (GB)

- Manufacturer

**1628. IVAR UA OOO**

**Technicko-obchodnizastoupeni proUA**

L.Ukrainky Str.33  
UA-08132/yshneve-Kyiv-Svyatos-hinskiy rayon  
Telefon +380-67 232 3519  
E-Mail ivarua@ua.fm  
Internet <http://www.ivar.com.ua>

REGISTER

1. AOV SHK-Wholesale-Organisation/CR
2. Copper Pipes
3. Plastic Pipe systems
4. NOVINKA Thermostatventile
5. Thermostats
6. manifolds
7. Verteiler für PEX/ALU-Verbundrohre
8. EUROKONUS Fittings
9. EMMETI Boiler
10. ALPEX GAS
11. OPTIMA Regler
12. IVAR PRESS
13. TECO Armaturen
14. EMMETI Fittings + Armaturen
15. alpex-duo Multilayer Systems
16. FRAENKISCHE Multilayer Pipes
17. PE-Xa Heiz- und Sanitärrohre
18. Fränkische Rohrwerke PEX-Heizrohre
19. Multilayer Pipes

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems  
- Hydronic floorheating  
- Multilayer pipes/ Sandwich pipes

COMPANY PROGRAMME (GB)

- Taps and valves for heating and hot water installations  
- Pipe connections for floorheating and radiators  
- Control technology and equipment

**1629. Khartsyzsk Tube Works JS Co**

9 Paton Str.  
UA- Khartsyzsk, Donetsk Reg.343 700

Telefax +380-6257 47355

E-Mail pmt@htz.donetsk.ua

REGISTER

1. PE 3-layer coating for pipes
2. GAZPROM PIPES

PRODUCER OF (GB)

- Steel pipes (FE)

COMPANY IS (GB)

- Manufacturer

**1630. KIEV INFORMA LTD**

Ternopil'ska Str. 17  
UA-03115 Kyiv, Ukraine  
Telefon +380-44-450 0215  
Telefax +380-44-424 3043  
E-Mail kiev-informa@ukr.net

REGISTER

1. RBM brass manifolds
2. RBM TITA FIX Tubo Multistrato
3. RBM/I Representative
4. Hot & Cold Water Systems
5. PE-Xb/Al/PE-Xb Verbundrohre
6. Collectors
7. Valves
8. WAVIN EKOPLASTIK Systems
9. FERROLI Boiler
10. PP-R cold and hot water pipes

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems  
- Hydronic floorheating  
- Multilayer pipes/ Sandwich pipes

COMPANY PROGRAMME (GB)

- Heating boilers, water heaters,  
- Taps and valves for heating and hot water installations  
- Pipe connections for floorheating and radiators

**1631. KIVAR**

Osypovskogo Str. 9  
UA-04123 Kyiv, Ukraine  
Telefon +380-44-501 7639  
Telefax +380-44-501 7638  
E-Mail kivar@multipipe.info  
Internet <http://www.multipipe.info>

REGISTER

1. Hot & Cold Water Systems
2. WEFATHERM PPR+Fibre+Alu Pipes
3. Honeywell-Systems
4. Oventrop Valves
5. Oventrop Thermostatventile
6. Purmo radiators
7. FERROLI Boiler

COMPANY HAS SYSTEMS (GB)

- Potable water systems/ Domestic hot water

- Radiator connection systems  
- Hydronic floorheating  
- Multilayer pipes/ Sandwich pipes

PRODUCER OF (GB)

- Plastic pipes (water, gas, drainage)

COMPANY IS (GB)

- Contractor plumbing and heating  
- Exclusiv importer

COMPANY PROGRAMME (GB)

- Heating boilers, water heaters,  
- Radiators  
- Taps and valves for heating and hot water installations  
- Pipe connections for floorheating and radiators

OTHER ACTIVITIES (GB)

- Other pipes

**COMPANY HAS SYSTEMS**

- 1: 471 Potable water systems/ Domestic hot water
- 2: 455 Radiator connection systems
- 3: 425 Hydronic floorheating
- 4: 252 Multilayer pipes/ Sandwich pipes
- 5: 131 Air conditioning
- 6: 5 Static ceiling cooling systems
- 7: 0 DIY Do-it-yourself systems
- 8: 123 Drainage systems

**PRODUCER OF**

- 9: 5 Copper pipes
- 10: 8 Steel pipes (FE)
- 11: 0 Electrofusion fittings
- 12: 0 Stainless steel pipes
- 13: 0 CPVC pipes
- 14: 3 PE-X pipes (Polyethylene crosslinked)
- 15: 44 PP-R pipes (Polypropylene)
- 16: 0 PB pipes (Polybutylene)
- 17: 16 Multilayer pipes/ Composite pipes (PE/AL)
- 18: 1 PE-RT PE-Raised Temperature Pipes
- 19: 126 Plastic pipes (water, gas, drainage)
- 20: 16 PP stabilised pipes (PP/AL)
- 21: 2 PE-Xa pipes (method Peroxid)
- 22: 15 PE-Xb pipes (Silane)
- 23: 2 PE-Xc pipes (Electrobeam crosslinking)
- 24: 2 Structured wallpipes/ Corrugated pipes/ Conduit lines
- 25: 2 Skirtings for covering heating pipes
- 26: 12 Pipe clips, fastening elements, Resilient mounting rail
- 27: 5 Floorheating panels
- 28: 42 Fittings for domestic hot water
- 29: 50 Taps and valves / faucets
- 30: 34 Manifolds, Cabinets for manifolds
- 31: 88 Heat exchangers, heat pumps, pumps
- 32: 1 Pipefitter's tools, pressing tools/ Clamps
- 33: 1 PE-/PP- foamed foils
- 34: 11 Conduits for cables and pipes

**COMPANY IS**

- 35: 132 Manufacturer
- 36: 24 Contractor plumbing and heating
- 37: 463 Wholesaler/ Stockist/ Plumber's merchant
- 38: 86 Exclusiv importer
- 39: 2 Architect/ Engineer
- 40: 75 Agent/ Sales office
- 41: 140 Branch, office
- 42: 2 Consultant, Market research
- 43: 10 Producer of machines and components
- 44: 1 Buying co-op/ Trade association
- 45: 17 Producer of granulate, compounds, auxiliaries

**CONNECTION FITTINGS**

- 46: 14 Compression fittings / Screw fittings
- 47: 0
- 48: 42 Pressing fittings (radial)
- 49: 27 Press fittings (axial)
- 50: 20 Gluing fittings
- 51: 74 Polyfusion welding
- 52: 21 Electrofusion fittings
- 53: 10 Soldering
- 54: 1 Shrink connection
- 55: 6 Push fittings
- 56: 9 Screw fittings

**MEMBER OF**

- 57: 3 ZVSHK: German Plumbers' Organisation
- 58: 1 KRV: Association of Plastic Pipe Manufacturers
- 59: 0 ASI: Project Group for Domestic PEX-Pipe Systems

- 60: 0 RPA: Radiant Panel Association/US
- 61: 0 bfv: Federal Organization for Radiant Panel Systems

**COMPANY PROGRAMME**

- 62: 0 Electronical crosslinking
- 63: 206 Heating boilers, water heaters,
- 64: 210 Radiators
- 65: 366 Taps and valves for heating and hot water installations
- 66: 321 Pipe connections for floorheating and radiators
- 67: 2 Pipe connections for industrial and other branches
- 68: 19 Water meters/ Water gauges
- 69: 31 Fastening technology / Screed
- 70: 143 Insulation materials for pipes and valves
- 71: 27 Shaped insulation panels
- 72: 1 Floorheating roll-on panels
- 73: 0 Large coils of pipe
- 74: 11 Floorheating with resilient mounting rail
- 75: 26 Floorheating with staple systems
- 76: 3 Floorheating steel grids/ fastmounting clips
- 77: 4 Polyurethane foam panels
- 78: 16 Styrene foam panels
- 79: 6 Flush tanks
- 80: 14 Baseboard radiant systems/Skirting Heating
- 81: 40 Electric panel heating
- 82: 15 Heavy duty underfloor heating
- 83: 4 Snow melting systems, sport grounds heating, road de-icing
- 84: 29 Wall heating systems, ceiling heating systems
- 85: 23 Solar heating equipment
- 86: 69 District heating pipes etc
- 87: 5 Compressed air systems
- 88: 56 Gas fittings and pipes for domestic installation
- 89: 24 Wall-mounted plumbing systems
- 90: 233 Control technology and equipment

**OTHER ACTIVITIES**

- 91: 11 Organization, hig school, software house, others
- 92: 143 Other pipes
- 93: 49 Other activities
- 94: 3 Organisations, institutes etc for certification

RR.24a Floorheating/RO (m) (Million Metres)						
Radiant Floorheating/Romania (Million Metres)						
Year	PE-X	PPR	PB	MP	CU	Summe
2004	1,80	0,40	0,02	-	0,01	2,2
2005	2,00	0,50	0,04	-	0,01	2,6
2006	2,20	0,60	0,05	0,02	0,02	2,9
2007	2,50	0,70	0,06	0,08	0,02	3,4
2008	2,80	0,75	0,08	0,20	0,03	3,9
2009	3,00	0,80	0,09	0,40	0,03	4,3
2010	3,10	0,85	0,10	0,70	0,04	4,8
Source: kwd, 2007-02 PEX= PEX+PE-RT+PE/ MP=Multilayer Pipes/ CU=Copper						
RR.24b Floorheating/RO (%) (% Market Shares)						
Radiant Floorheating/Romania (% Market Shares)						
Year	PE-X	PPR	PB	MP	CU	Summe
2004	80,7%	17,9%	0,9%	0,0%	0,4%	100,0%
2005	78,4%	19,6%	1,6%	0,0%	0,4%	100,0%
2006	76,1%	20,8%	1,7%	0,7%	0,7%	100,0%
2007	74,4%	20,8%	1,8%	2,4%	0,6%	100,0%
2008	72,5%	19,4%	2,1%	5,2%	0,8%	100,0%
2009	69,4%	18,5%	2,1%	9,3%	0,7%	100,0%
2010	64,7%	17,7%	2,1%	14,6%	0,8%	100,0%
Source: kwd, 2007-02						
RR.24c Floorheating/RO (+/-) (+/- % Change to Previous Year)						
Radiant Floorheating/Romania (+/- % Change on Previous Year)						
Year	PE-X	PPR	PB	MP	CU	Summe
2004	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%
2005	+11.1%	+25.0%	+100.0%	+/-0%	+/-0%	+14.3%
2006	+10.0%	+20.0%	+25.0%	+/-0%	+100.0%	+13.3%
2007	+13.6%	+16.7%	+20.0%	00.0%	+/-0%	+16.3%
2008	+12.0%	+7.1%	+33.3%	50.0%	+50.0%	+14.9%
2009	+7.1%	+6.7%	+12.5%	00.0%	+/-0%	+11.9%
2010	+3.3%	+6.2%	+11.1%	75.0%	+33.3%	+10.9%
Source: kwd, 2007-02						

RR.24d Radiator Heating/RO (m) (Million Metres)							
Radiator Heating/Romania (Million Metres)							
Year	PE-X	PPR	PB	MP	CU	FE	Summe
2004	0,7	0,20	-	0,40	0,60	2,2	4,1
2005	0,9	0,30	-	0,90	0,65	2,2	5,0
2006	1,2	0,40	-	1,50	0,70	2,1	5,9
2007	1,4	0,45	-	2,00	0,75	2,1	6,7
2008	1,5	0,40	-	2,50	0,75	2,0	7,2
2009	1,6	0,40	-	3,00	0,80	1,9	7,7
2010	1,6	0,40	-	3,50	0,80	1,8	8,1
Source: kwd, 2007-02 PEX=PEX+PE-RT+PE/ MP=Multilayer/ CU=Copper/ FE=Steel							
RR.24e Radiator Heating/RO (%) (% Market Shares)							
Radiator Heating/Romania (% Market Shares)							
Year	PE-X	PPR	PB	MP	CU	FE	Summe
2004	17,1%	4,9%	0,0%	9,8%	14,6%	53,7%	100,0%
2005	18,2%	6,1%	0,0%	18,2%	13,1%	44,4%	100,0%
2006	20,3%	6,8%	0,0%	25,4%	11,9%	35,6%	100,0%
2007	20,9%	6,7%	0,0%	29,9%	11,2%	31,3%	100,0%
2008	21,0%	5,6%	0,0%	35,0%	10,5%	28,0%	100,0%
2009	20,8%	5,2%	0,0%	39,0%	10,4%	24,7%	100,0%
2010	19,8%	4,9%	0,0%	43,2%	9,9%	22,2%	100,0%
Source: kwd, 2007-02							
RR.24f Radiator Heating/RO (+/-) (+/- % Change om Previous Year)							
Radiator Heating/Romania (+/- % Change on Previous Year)							
Year	PE-X	PPR	PB	MP	CU	FE	Summe
2004	+/-0%	+/-0%/-0%		+/-0%	+/-0%	+/-0%	+/-0%
2005	+28.6%	+50.0%/-0%		+125.0%	+8.3%	+/-0%	+20.7%
2006	+33.3%	+33.3%/-0%		+66.7%	+7.7%	-4.5%	+19.2%
2007	+16.7%	+12.5%/-0%		+33.3%	+7.1%	+/-0%	+13.6%
2008	+7.1%	-11.1%/-0%		+25.0%	+/-0%	-4.8%	+6.7%
2009	+6.7%	+/-0%/-0%		+20.0%	+6.7%	-5.0%	+7.7%
2010	+/-0%	+/-0%/-0%		+16.7%	+/-0%	-5.3%	+5.2%
Source: kwd, 2007-02							

RR.24g Plumbing Systems/RO (m) (Million Metres)								
Plumbing Systems/Romania (Million Metres)								
Year	PE-X	PPR	PB	MP	CPVC	CU	FE	Summe
2004	0,6	0,9	0,01	0,30	0,10	0,65	2,1	4,7
2005	0,7	1,1	0,03	0,45	0,15	0,70	2,1	5,2
2006	0,8	1,3	0,05	0,70	0,20	0,72	2,1	5,9
2007	0,9	1,4	0,06	1,10	0,25	0,74	2,0	6,5
2008	1,0	1,5	0,08	1,60	0,30	0,80	2,0	7,3
2009	1,0	1,6	0,10	2,20	0,30	0,82	1,9	7,9
2010	1,1	1,5	0,15	2,80	0,35	0,84	1,8	8,5
Source: kwd, 2007-02 PEX=PEX+PE-RT+PE/ MP=Multilayer/ CU=Copper/ FE=Steel								
RR.24h Plumbing Systems/RO (%) (% Market Shares)								
Plumbing Systems/Romania (% Market Shares)								
Year	PE-X	PPR	PB	MP	CPVC	CU	FE	Summe
2004	12,9%	19,3%	0,2%	6,4%	2,1%	13,9%	45,1%	100,0%
2005	13,4%	21,0%	0,6%	8,6%	2,9%	13,4%	40,2%	100,0%
2006	13,6%	22,1%	0,9%	11,9%	3,4%	12,3%	35,8%	100,0%
2007	14,0%	21,7%	0,9%	17,1%	3,9%	11,5%	31,0%	100,0%
2008	13,7%	20,6%	1,1%	22,0%	4,1%	11,0%	27,5%	100,0%
2009	12,6%	20,2%	1,3%	27,8%	3,8%	10,4%	24,0%	100,0%
2010	12,9%	17,6%	1,8%	32,8%	4,1%	9,8%	21,1%	100,0%
Source: kwd, 2007-02								
RR.24i Plumbing Systems/RO (+/-) (+/- % Change on Previous Year)								
Plumbing Systems/Romania (+/- % Change on Previous Year)								
Year	PE-X	PPR	PB	MP	CPVC	CU	FE	Summe
2004	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%
2005	+16.7%	+22.2%	+200.0%	+50.0%	+50.0%	+7.7%	+/-0%	+12.2%
2006	+14.3%	+18.2%	+66.7%	+55.6%	+33.3%	+2.9%	+/-0%	+12.2%
2007	+12.5%	+7.7%	+20.0%	+57.1%	+25.0%	+2.8%	-4.8%	+9.9%
2008	+11.1%	+7.1%	+33.3%	+45.5%	+20.0%	+8.1%	+/-0%	+12.9%
2009	+/-0%	+6.7%	+25.0%	+37.5%	+/-0%	+2.5%	-5.0%	+8.8%
2010	+10.0%	-6.3%	+50.0%	+27.3%	+16.7%	+2.4%	-5.3%	+7.8%
Source: kwd, 2007-02								

RR.24k P&H Systems total/RO (m) (Million Systems)							
ALL Plumbing & Heating Systems and Materials/Romania (Million Metres)							
Year	FE	CU	CPVC	PE-X	PP-R	MP	Summe
2004	4,30	1,26	0,10	3,10	1,50	0,70	11,0
2005	4,39	1,36	0,15	3,60	1,90	1,35	12,8
2006	4,20	1,46	0,20	4,20	2,30	2,22	14,6
2007	4,10	1,51	0,25	4,80	2,55	3,18	16,4
2008	4,00	1,58	0,30	5,30	2,65	4,30	18,1
2009	3,80	1,65	0,30	5,60	3,10	5,60	20,1
2010	3,60	1,68	0,35	5,80	2,75	7,00	21,2
Source: kwd, 2007-02							
FE = Steel Pipes CU = Copper Pipes Est = Stainless Steel Pipes PVCC = CPVC Pipes PE-X = PE-X + PE-RT + PE Pipes PP-R = Polypropylen Pipes PB = Bolybutylene Pipes MP = Multilayer Pipes (PE/AL)							
RR.24l P&H Systems total/RO (%) (% Market Shares)							
ALL Plumbing & Heating Systems and Materials/Romania (% Market Shares)							
Year	FE	CU	CPVC	PE-X	PP-R	MP	Summe
2004	39,2%	11,5%	0,9%	28,3%	13,7%	6,4%	100,0%
2005	34,4%	10,7%	1,2%	28,2%	14,9%	10,6%	100,0%
2006	28,8%	10,0%	1,4%	28,8%	15,8%	15,2%	100,0%
2007	25,0%	9,2%	1,5%	29,3%	15,6%	19,4%	100,0%
2008	22,1%	8,7%	1,7%	29,2%	14,6%	23,7%	100,0%
2009	19,0%	8,2%	1,5%	27,9%	15,5%	27,9%	100,0%
2010	17,0%	7,9%	1,7%	27,4%	13,0%	33,1%	100,0%
Source: kwd, 2007-02							
FE = Steel Pipes CU = Copper Pipes Est = Stainless Steel Pipes PVCC = CPVC Pipes PE-X = PE-X + PE-RT + PE Pipes PP-R = Polypropylen Pipes PB = Bolybutylene Pipes MP = Multilayer Pipes (PE/AL)							

RR.24m P&H Systems total/RO (+/-) (+/- % Change on Previous Year)

ALL Plumbing & Heating Systems and Materials/Romania  
(+/- % Change on Previous Year)

Year	FE	CU	CPVC	PE-X	PP-R	MP	Summe
2004	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%	+/-0%
2005	+2.1%	+7.9%	+50.0%	+16.1%	+26.7%	+92.9%	+16.3%
2006	-4.3%	+7.4%	+33.3%	+16.7%	+21.1%	+64.4%	+14.4%
2007	-2.4%	+3.4%	+25.0%	+14.3%	+10.9%	+43.2%	+12.4%
2008	-2.4%	+4.6%	+20.0%	+10.4%	+3.9%	+35.2%	+10.6%
2009	-5.0%	+4.4%	+/-0%	+5.7%	+17.0%	+30.2%	+10.6%
2010	-5.3%	+1.8%	+16.7%	+3.6%	-11.3%	+25.0%	+5.6%

Source: kwd, 2007-02

FE = Steel Pipes  
 CU = Copper Pipes  
 ESt = Stainless Steel Pipes  
 PVCC = CPVC Pipes  
 PE-X = PE-X + PE-RT + PE Pipes  
 PP-R = Polypropylen Pipes  
 PB = Bolybutylene Pipes  
 MP = Multilayer Pipes (PE/AL)

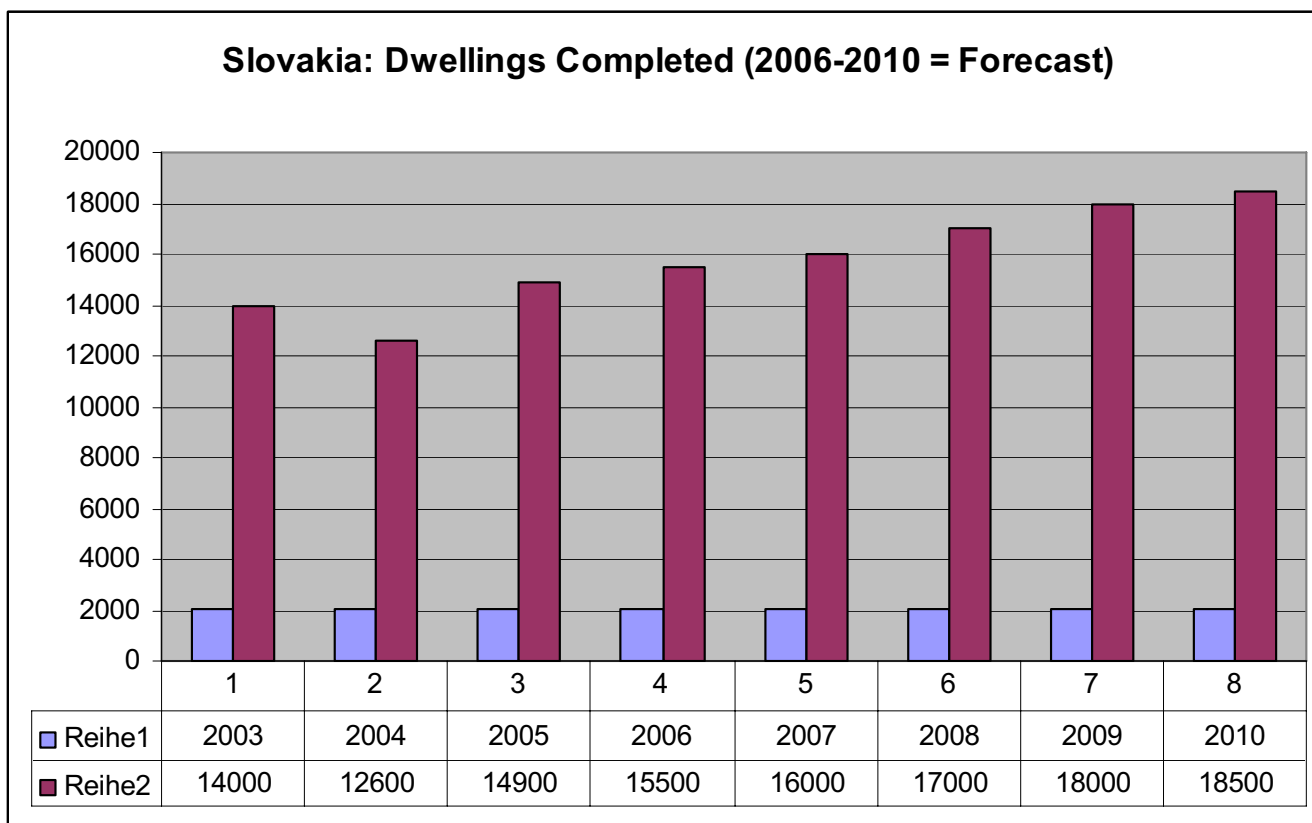
**Slovakia-Slowakei (SK)**

5,3 Mio Inhabitants  
58% = Percentage living in urban areas

Bratislava 450.000 Inhabitants (Capital)  
Kosice 235.000 Inhabitants

**Housing Market Slovakia (Completed dwellings)**

Year	1+2 Family Houses	Flats	Dwellings total (thousands)
2003	7,6	6,4	14,0
2004	8,6	4,0	12,6
2005	8,7	6,2	14,9
2006	8,0	7,5	15,5
2007	8,1	7,9	16,0
2008	8,5	8,5	17,0
2009	8,7	9,3	18,0
2010	8,9	9,6	18,5

**Slovakia: Dwellings Completed (2006-2010 = Forecast)****The construction industry in Slovakia**

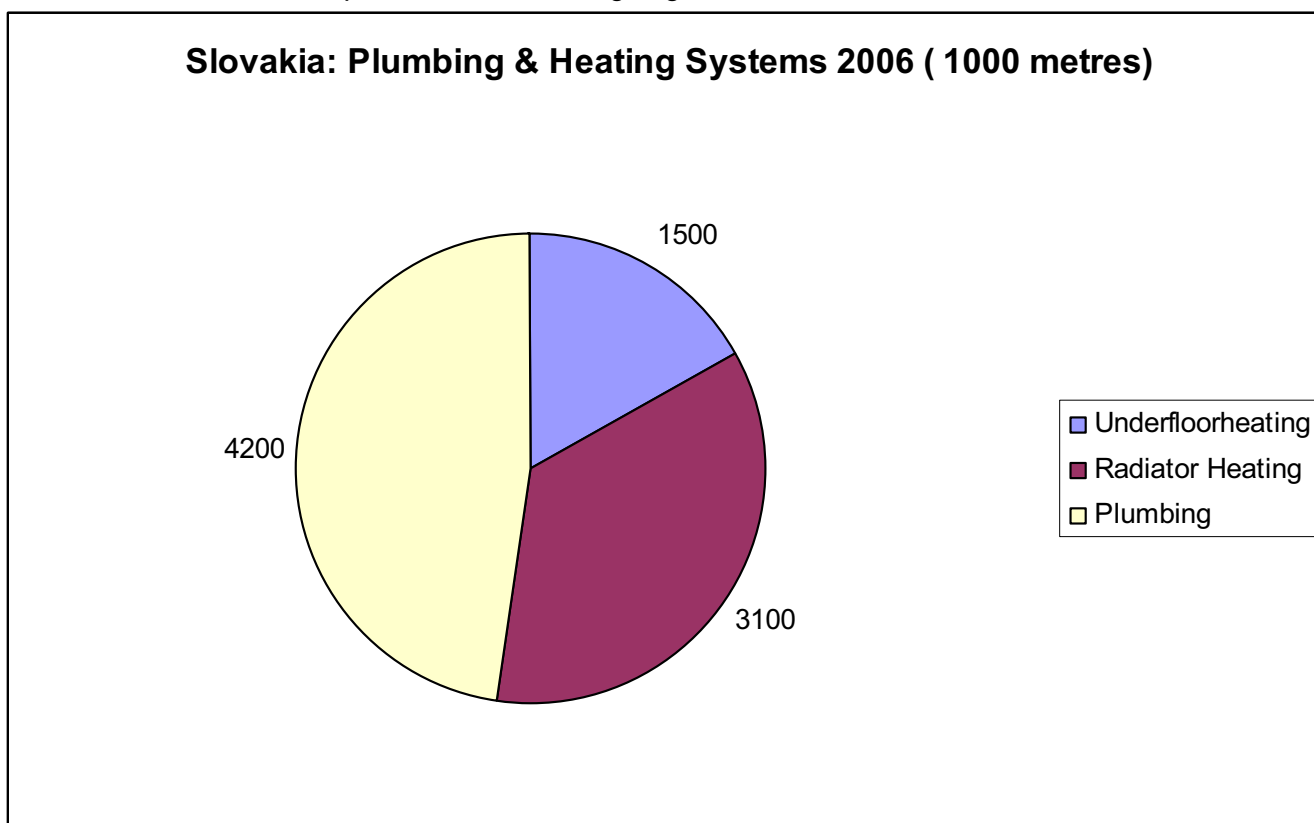
Since 2001 the Slovakian construction industry has been enjoying a period of growth. In **2005, the real growth figure was plus 13.7%** which gave rise to yet further growth. Demand for new apartments alone is something in the order of 260,000 units or a value of 500 billion Slovak Korunas. Around 400 billion Slovak Korunas needs to be spent on repairs or modernisation of pre-cast concrete apartments and other old homes.

The **Slovakian boom is dominated by the housing sector**. Foreign project developers are mainly involved in the upper price echelons but are also increasingly involved in house building with state funds. + + + The demand for new homes in Slovakia continues to be phenomenal. The construction industry is enjoying a particular boom in the capital Bratislava and the surrounding area. More and more foreign constructors, a huge number of whom come from the Czech Republic, have been making the most of the recent potential amongst buyers. These builders concentrate on high-quality homes. Today's house-builders are using higher quality building materials than was generally the case a few years ago. Foreign suppliers are benefiting from this trend.

**House building in Slovakia has a lot of catching up to do**. There are currently 310 homes for every 1,000 inhabitants in Slovakia while the figure for the old EU states is 400 to 500.

Almost **15,000 new housing units were completed in 2005**. This figure is far higher than in any other year since the start of the economic reforms. Despite this, building activities, measured by the number of homes produced per 1,000 inhabitants (2.76 units), is still not anywhere near close to the intensity of house building in the neighbouring countries of the Czech Republic and Poland.

If the **construction industry were to remain at its current level**, Slovakia would still be more than 100,000 short in 2010 compared with the average figures for the EU-15.



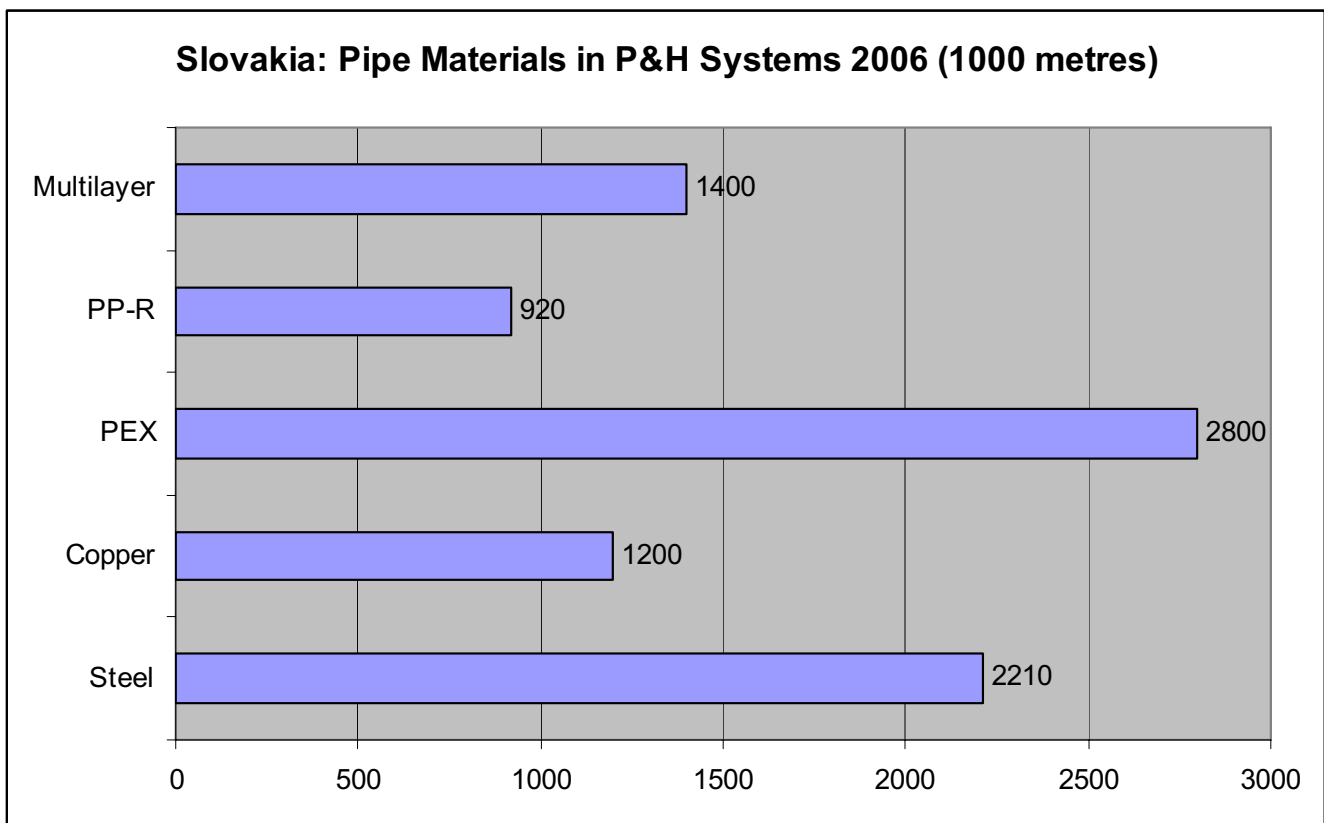
### **Slovakia's pre-cast concrete apartments are in serious need of refurbishment**

The majority of housing stock in Slovakia consists of pre-cast concrete apartments which desperately need modernising. **Of the 862,500 housing units** currently used in **apartment blocks**, almost three quarters or more than **600,000 of them were constructed in pre-cast concrete blocks**. A good third of the country's 5.4 million inhabitants live in these homes, virtually all of which were privatised in the 1990s. The percentage of pre-cast concrete apartments amongst the housing stock is a huge 38% and is greater than the figure for its former sister country, the Czech Republic (31%). The **bulk of housing units in apartment blocks** were built between 1971 and 1980 (282,930). The figure for the previous decade was 167,230 and the following ten years 210,850 units.

**Bratislava's Institute for Research and Development in Civil Engineering** (Vyskumno-vyvojovy ustav pozemniho stavitelstva VUPS-NOVA) was commissioned by the government to produce a study into the present condition of pre-cast concrete apartments. This found that after more than 30 years of use, the country has **166,000 housing units requiring complex modernisation**. In a further 172,000 homes, most of which were built after 1983, there are serious technical problems which **need to be**

**resolved and close to 300,000 units from the stock of pre-cast concrete apartments** have a backlog of various repair work, such as the replacement of balconies.

The gradually developing market for residential modernisation in Slovakia offers **huge business potential for foreign providers** of proven technologies and civil engineering solutions for low-cost sanitation for many years to come. When looking for Slovakian cooperation partners, the Association of Construction Entrepreneurs of Slovakia ([www.zsps.sk](http://www.zsps.sk)) or the German-Slovakian Chamber of Commerce and Industry ([www.dsikh.sk](http://www.dsikh.sk)) are very helpful. It is also well worth contacting the **Association for Building Insulation**, set up in 2001, headed since mid-2005 by the former General Director for the Construction Industry in the Ministry for the Construction Industry and Regional Development, Anton Novotny, (Tel.: 004212/49 22 85 52). + + + The **cost of 'replacing heating pipes' is also stated (2005) as € 790 per pre-cast concrete home**. bfai Köln, 1.12.2005



#### Company Activities:

- Aquatherm/D: S-Komplex
- Armacel/D: Austroclima
- Buderus/D: Buderus technika SK
- EKOPLASTIK/CZ: Agua sro, C.B.K, I.TOP Centrum
- Friatec/D: Glynwed sro SK
- Gabotherm/D: KKH spol
- Geberit/CH: Gebrit spol SK
- Hage(Simplex)/D: Armaturex
- Junkers Bosch/D: Thermopol Galanta
- Universa/A: Universa metal SK
- Pedotherm/D: Pedotherm Slovakia
- Schell/D: Armaturex sro
- Wolf/D: Flow Clima SK

## Articles from KWD-globalpipe

### Galanta/Slovakia: PE-RT enhances the value chain for underfloor heating

Kwd, 12.12.2006. **Galanta** is a provincial town in **western Slovakia**, not far from the capital Bratislava and only 120 kilometres from Vienna. Here are the headquarters of **THERMOPOL**, a **company specialising in turnkey systems for underfloor heating**, including design, manufacture and supply. THERMOPOL operates across the entire value chain, **from the manufacture of pipes and fittings through installation to servicing and maintenance**. The company's success on the Slovakian market is underpinned by the supply of high quality thermoplastic materials from Dow. **DOW and THERMOPOL have worked in collaboration for over five years**. **Silvester Kovács** is the owner and managing director of THERMOPOL. + + + Underfloor heating has only recently become popular in Slovakia. Question to Mr. Kovacs: **"When did you first become interested in this advanced type of heating system and decide to become involved professionally?"** This was his reply: "Reading the technical literature available in the 1980s while I was working as an installer of central heating systems, I came across new energy sources and underfloor heating systems. I was interested in the technology and eventually it became my hobby. Gradually I started to specialise in **designing and installing underfloor heating systems** for friends and acquaintances. At that time, there were no specialist materials available and I had to work with the pipes I could obtain in Slovakia. I was pleasantly surprised by the results, as the systems are still working today." **At the beginning of the 1990s**, Kovács set up his company **THERMOPOL** in Galanta. There was no sudden expansion or boom, but the company made steady progress towards its goal. Today



VYKUROVACIA RÚRKA  
THERMOPOL® OXIFLEX/PE-RT

Materiál: PE - DOWLEX 2344E

Prevádzkový tlak: 2 MPa (PN12,5)

Prevádzková teplota: 95°C

Farba: Metalovo biela

Osobitné vlastnosti: šesťvrstvová, difúzne nepriepustná,  
s kyslíkovou bariérou, polyfúzne zvariteľná!!!

Balenie:- do 20 mm - zvitok 200 m  
- na požiadanie zvitok aj nad 200 m

**THERMOPOL**

has 35  
employees and  
concentrates on

**underfloor heating technology and design.** The company manufactures **systems made from plastics**, makes its own tools and moulds, designs heating systems, **installs underfloor heating systems to its own**

**designs**, and provides maintenance and consultancy services. It operates from its **own factory and office building** in the town centre. + + + THERMOPOL has business partners and **clients throughout Slovakia**. The main focus of the business is the building sector and the supply of underfloor heating systems for houses and apartment blocks. **Clients include both companies** (wholesalers) and **private individuals** building their own house (plumbers). The main advantage is that THERMOPOL is **both manufacturer and supplier**. As a result, feedback is guaranteed, enabling the company to respond directly to the client's needs. + + + The life of the heating pipe is a decisive factor in the quality standard the company aims to achieve.

The ease and speed with which the materials used can be processed is important in achieving a good profit margin. Initially, the **PE-RT materials supplied by DOW** provided only the necessary high temperature resistance. These materials were then replaced by Dowlex. The flexibility of the pipes also played a part in this decision, as it made installation in situ considerably easier. + + + When **Thermopol was established**, only **polypropylene pipes** were initially produced. Subsequently the company switched to the manufacture of **PE-Xb heating pipes**, but the production technology was not at all simple. THERMOPOL then began to look for a top quality material which could be easily handled with existing know how and came across **DOWLEX (TM) Polyethylene (PE-RT)** at the **Inchoba International Fair in Bratislava**. This material enabled THERMOPOL successfully to extrude the first pipes which **best suited both production and application requirements**.

The relevant certifications had to be obtained, which involved a substantial amount of administrative work. **Various tests** had to be carried out not only on the **materials** but also on the **extruded pipes**.

DOW provided considerable support to the company in this process, both in drawing up the necessary documentation and through the certification procedure itself. It was particularly helpful that DOW even sent its own personnel to the company to provide professional assistance. This saved THERMOPOL a vast amount of time and money and also helped to forge personal links, which are always valuable.

The **quantity of DOWLEX (TM) PE-RT required annually** depends on the installation capacity and, of course, on the requirements in the region. It is currently only a relatively small amount compared with competitors elsewhere in Europe. The **Slovakian building industry** is, however, going through a **phase of very strong growth**, supported both by the Slovakian government and by EU funds. THERMOPOL could, therefore, increase the **annual quantity of heating pipes** for underfloor heating **by 300% to 400%**. THERMOPOL currently manufactures its pipes **exclusively from** different variants of **PE-RT**. The company has developed its **own 6-layer pipe technology**, which provides an optimal barrier for oxygen permeability. The combination of high-quality material, production technology and in situ installation is particularly important in meeting customers' high expectations. + + + The company is especially pleased with **DOW's new variant of the material**, which is not only for suitable underfloor heating but also meets hygiene safety standards and means that the pipe and system range can be extended to **domestic heating and plumbing systems**. New opportunities are now opening up in Slovakia for further applications using PE-RT, as **polypropylene mains pipes** do not meet all expectations.

Although the Slovakian market is saturated with products of very varied quality, **Silvester Kovács still** sees expansion opportunities for **innovative products** and gathers as much information as possible at trade fairs and through trips abroad, as the proverb says "**Better to see something once than to hear about it a hundred times**".

**Contact:** Silvester Kovacs, Thermopol Galanta, SK-92400 Galanta, 29.August c 16, Tel. +31-780-6676  
[thermopol@thermopol.sk](mailto:thermopol@thermopol.sk), [www.thermopol.sk](http://www.thermopol.sk), [skovacs@thermopol.sk](mailto:skovacs@thermopol.sk).

### **Pipelife acquires minority shares in the Czech and Slovak Republic**

KWD-globalpipe, 2003-104. On October 20th, 2003, **Pipelife and Aliachem** have signed an agreement **to transfer the 33,3% shares in Pipelife-Fatra s.r.o, Czech Republic, and Pipelife-Fatra Slovakia s.r.o.** owned by Aliachem **to Pipelife**. With the acquisition of these shares, the Pipelife Group now owns 100% of both activities.

The acquisition is in line with **Pipelife's strategy to further develop its leading position in Eastern Europe**. The full ownership of Pipelife will allow the group to utilize all potential group synergies in these two countries. The combined activities achieved sales of 15,3mEUR and employed 110 employees in 2002.

The **Pipelife Group** is one of the leading producers of quality Pipes and Fittings with activities in 26 countries. The Pipelife Group, which has its headquarters in Vienna, Austria, achieved net sales of 610mEUR and employed 2700 employees in 2002.

**Contact:** Pipelife Austria GmbH & Co KG, IZ-NÖ Süd, Strasse 1, Objekt 27, A-2355 Wr. Neudorf  
Tel: +43.2236.6702-0, Fax: +43.2236.6702-264 or 670, [office@pipelife.at](mailto:office@pipelife.at), [www.pipelife.at](http://www.pipelife.at)

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Ch.Hamich Verlagsbüro • Jahnstraße 57 • D-64285 Darmstadt

Verlagsbüro Ch.Hamich  
Jahnstrasse 57  
D-64285 DARMSTADT

**FAX: +49-6151-61548**

**E-Mail: [kwd-online@kwd-online.de](mailto:kwd-online@kwd-online.de)**



**Distribution**  
Jahnstraße 57  
**D-64285 Darmstadt**  
Tel.: +49 6151/61848  
Fax: +49 6151/61548

**E-Mail:**  
[kwd-online@kwd-online.de](mailto:kwd-online@kwd-online.de)  
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