



---

**POTENTIAL OF  
AUTOMOTIVE-RELATED  
COATINGS IN EASTERN  
EUROPE  
(SEGMENT BY COUNTRY)**

**© INFORMATION RESEARCH (IRL)  
OCTOBER 2006**

CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL  
Tel: +44 (0) 20 8832 7830 Fax: +44 (0) 20 8566 4931  
Email: [irl@brg.co.uk](mailto:irl@brg.co.uk)  
Web site: [www.informationresearch.co.uk](http://www.informationresearch.co.uk)

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

---



## **NOTE**

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many IRL reports contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of IRL to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report or in different business areas.

## **MORE INFORMATION ON IRL**

Should you require more information on either our published reports or our private client services, please contact us at the address given.

Full details on all IRL published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website :

**[www.informationresearch.co.uk](http://www.informationresearch.co.uk)**

---



# CONTENTS

<b>1. INTRODUCTION.....</b>	<b>1</b>
1.1 ABOUT THE REPORT .....	1
1.2 SCOPE .....	1
1.3 METHODOLOGY.....	1
1.4 UNITS OF VOLUME AND VALUE.....	1
1.5 FORECAST .....	2
1.6 ROUNDING .....	2
<b>2. EXECUTIVE SUMMARY.....</b>	<b>3</b>
<b>3. THE AUTOMOTIVE INDUSTRY .....</b>	<b>5</b>
3.1 BELARUS .....	5
3.1.1 Car Production and Sales .....	5
3.1.2 Trucks and Buses .....	6
3.1.3 Car Manufacturers.....	9
3.1.4 Manufacturers of Other Vehicles .....	9
3.1.5 Exports.....	11
3.2 CZECH REPUBLIC .....	12
3.2.1 Component Suppliers .....	16
3.3 HUNGARY.....	16
3.3.1 Significance of the Industry.....	16
3.4 POLAND .....	21
3.4.1 Cars and Commercial Vehicles.....	21
3.4.2 Buses and Trucks .....	26
3.4.3 Strength of the Component Sector.....	27
3.5 RUSSIA .....	28
3.5.1 Shifts in Car Production.....	28
3.5.2 Major Manufacturers - Cars.....	28
3.5.3 Major Manufacturers - Buses .....	30
3.5.4 Major Producers - Trucks and LCVs .....	32
3.5.5 Investments.....	34
3.5.6 Passenger Car Market .....	35
3.6 SLOVAKIA .....	37
3.7 TURKEY .....	41
3.7.1 Manufacturing Overview .....	41
3.7.2 Domestic Sales .....	43
3.7.3 Vehicle Ownership .....	44
3.7.4 Vehicle Exports .....	45
3.7.5 Automotive Component Supply .....	48
3.8 UKRAINE.....	49
3.8.1 Manufacturing Overview .....	49
3.8.2 Truck Production .....	49
3.8.3 Bus Production.....	50
3.8.4 Cars.....	51
3.8.5 Imports and Exports.....	53
3.8.6 Domestic Production.....	54
3.8.7 Investment .....	55
3.8.8 Forecasts.....	55
3.8.9 Main Market Players.....	56
<b>4. AUTOMOTIVE OEM COATINGS.....</b>	<b>59</b>
4.1 BELARUS .....	59
4.1.1 Lida LKZ.....	59



4.1.2	Consumption at MAZ.....	60
4.1.3	Consumption at MZKT.....	61
4.1.4	Consumption at BelAZ.....	61
4.1.5	Consumption at Gomselmash.....	62
4.1.6	Future Trends.....	62
4.2	CZECH REPUBLIC .....	63
4.3	HUNGARY.....	64
4.4	POLAND .....	65
4.4.1	Technology Demand.....	65
4.4.2	Market Data.....	65
4.4.3	Future Opportunities and Trends.....	66
4.5	RUSSIA .....	67
4.5.1	Production.....	67
4.5.2	Imports .....	68
4.5.3	Technology.....	69
4.5.4	Undercoats (Electrodeposition Primers and Primer-Surfacers).....	70
4.5.5	Topcoats (Basecoats and Clearcoats).....	70
4.5.6	Exports .....	71
4.5.7	Consumer Overview.....	71
4.5.8	The Market and Market Trends.....	72
4.6	SLOVAKIA .....	73
4.7	TURKEY .....	75
4.8	UKRAINE.....	75
4.8.1	Consumption Overview .....	75
4.8.2	Consumers - Cars.....	76
4.8.3	Consumers – Other Vehicles.....	77
4.8.4	Trends and Growth .....	78
<b>5.</b>	<b>AUTOMOTIVE REFINISH .....</b>	<b>79</b>
5.1	BELARUS .....	79
5.1.1	General Picture.....	79
5.1.2	Suppliers .....	79
5.1.3	Consumer Market.....	80
5.1.4	Technology.....	80
5.1.5	Pricing and Segmentation.....	81
5.1.6	Trends and Growth .....	83
5.2	CZECH REPUBLIC .....	83
5.3	HUNGARY.....	85
5.4	POLAND .....	87
5.4.1	Trading Patterns .....	87
5.4.2	Market Data and Participation.....	87
5.4.3	Market Size and Trends.....	87
5.5	RUSSIA .....	89
5.5.1	Supplier Overview.....	89
5.5.2	Exports .....	90
5.5.3	Market Split and Characteristics .....	90
5.5.4	Premium Segment .....	91
5.5.5	Medium Price Segment .....	91
5.5.6	Low Price segment.....	92
5.5.7	Technology.....	92
5.5.8	Trends and Growth Factors.....	93
5.5.9	Regional Notes.....	94
5.6	SLOVAKIA .....	95
5.6.1	Market Overview.....	95
5.6.2	Market Development and Drivers.....	97
5.7	TURKEY .....	98
5.8	UKRAINE.....	99
5.8.1	Participation .....	99
5.8.2	Pricing.....	100
5.8.3	Premium Segment .....	101



5.8.4	Medium Segment .....	102
5.8.5	Customer Base .....	103
5.8.6	Technology .....	104
5.8.7	Trends and Growth .....	105
<b>6.</b>	<b>POWDER COATINGS .....</b>	<b>107</b>
6.1	BELARUS .....	107
6.1.1	Nature of the Market .....	107
6.1.2	Technology .....	108
6.2	CZECH REPUBLIC .....	109
6.2.1	Technology .....	111
6.2.2	Major Players .....	111
6.3	HUNGARY .....	112
6.4	POLAND .....	114
6.5	RUSSIA .....	116
6.5.1	Production and Major Producers .....	116
6.5.2	Minor Producers .....	117
6.5.3	Foreign Suppliers .....	117
6.5.4	Regional Notes .....	118
6.5.5	Technology .....	119
6.5.6	Market Characteristics .....	120
6.5.7	Pricing .....	120
6.5.8	Growth and Future Trends .....	121
6.5.9	Automotive Consumption .....	121
6.6	SLOVAKIA .....	123
6.7	TURKEY .....	125
6.8	UKRAINE .....	127
6.8.1	Emphasis on Captive Production .....	127
6.8.2	Suppliers .....	127
6.8.3	Technology .....	129
6.8.4	Consumer Base .....	130
6.8.5	Automotive Applications .....	131
6.8.6	Future Trends and Growth .....	132
<b>7.</b>	<b>COATINGS FOR PLASTICS .....</b>	<b>133</b>
7.1	BELARUS .....	133
7.1.1	Major Consumers .....	133
7.1.2	Suppliers .....	134
7.1.3	Automotive Aspects .....	134
7.1.4	Market Forecast and Trends .....	135
7.2	CZECH REPUBLIC .....	136
7.3	HUNGARY .....	137
7.4	POLAND .....	138
7.4.1	Industry Participants .....	138
7.4.2	Markets and Growth Potential .....	138
7.5	RUSSIA .....	140
7.5.1	Significance and Suppliers .....	140
7.5.2	Automotive Sector .....	141
7.5.3	Non-automotive Applications .....	142
7.5.4	Market Trends and Future Growth .....	143
7.6	SLOVAKIA .....	144
7.7	TURKEY .....	145
7.8	UKRAINE .....	146
7.8.1	Brief Overview .....	146
7.8.2	Automotive Industry .....	147
<b>8.</b>	<b>MARKET FORECAST .....</b>	<b>149</b>
<b>9.</b>	<b>AUTOMOTIVE INDUSTRY ORGANISATIONS AND ASSOCIATIONS .....</b>	<b>151</b>
9.1	BELARUS .....	151



9.2	CZECH REPUBLIC .....	151
9.3	HUNGARY .....	151
9.4	POLAND .....	151
9.5	RUSSIA .....	151
9.6	SLOVAK REPUBLIC .....	152
9.7	TURKEY .....	152
9.8	UKRAINE.....	152
<b>10.</b>	<b>DIRECTORY OF MANUFACTURERS .....</b>	<b>153</b>
10.1	BELARUS .....	153
10.2	CZECH REPUBLIC .....	155
10.3	HUNGARY .....	157
10.4	POLAND .....	159
10.5	RUSSIA .....	165
10.6	SLOVAKIA .....	177
10.7	TURKEY .....	179
10.8	UKRAINE.....	193

---



## TABLE OF TABLES

<b>1. INTRODUCTION.....</b>	<b>1</b>
1.1 ABOUT THE REPORT .....	1
1.2 SCOPE .....	1
1.3 METHODOLOGY.....	1
1.4 UNITS OF VOLUME AND VALUE.....	1
1.5 FORECAST .....	2
1.6 ROUNDING .....	2
<b>2. EXECUTIVE SUMMARY.....</b>	<b>3</b>
Executive Summary for Markets in Belarus, Czech Republic, Hungary and Poland.....	3
Executive Summary for Markets in Russia, Slovakia, Turkey and the Ukraine .....	4
<b>3. THE AUTOMOTIVE INDUSTRY .....</b>	<b>5</b>
3.1 BELARUS .....	5
Commercial and Passenger Vehicle Production in Belarus, 2003-2005 (Units).....	6
Vehicle Exports in the Belarusian Automotive OEM Industry, 2003-2005 (Units) .....	11
3.2 CZECH REPUBLIC .....	12
Structure of the Czech Car Market, New vs Used Cars, 2005 (%) .....	12
Market Shares in the Czech Car Market, 2005 (%) .....	13
Czech Vehicle Production, 2003-5 (Units).....	14
Background on Czech Automotive OEMs.....	15
3.3 HUNGARY.....	16
Hungarian Domestic Vehicle Sales, 2005 (Units) .....	17
Market Shares in the Hungarian Automotive Market, 2005 (%) .....	17
Hungarian Vehicle Production, 2003-2005 .....	18
Background on Hungarian Automotive OEM Producers.....	19
Background on the Hungarian Automotive OEM Producers.....	20
Hungarian Vehicle OEM Production and Exports, 2005 (Units and %).....	21
3.4 POLAND .....	21
Annual Sales of New Passenger Cars in Poland, 2003-5 (Units and Change %).....	22
Annual Sales of New Commercial Vehicles in Poland, 2003-5 (Units and Change %) .....	22
Annual Production of New Passenger Cars in Poland, 2003-5 (Units and %).....	23
Annual Production of New Commercial Vehicles in Poland, 2003-5 (Units and %).....	23
Background on Polish Automotive OEM Companies .....	25
Background on Polish Automotive OEM Companies .....	26
3.5 RUSSIA .....	28
Russian Automotive Production by Brand, 2003-5 (Units and Growth %) .....	29
Manufacturing Output at GAZ by Vehicle Type, 2005 (%) .....	29
Russian Bus Production, 2003-5 (Units and Growth %) .....	31
Russian Production of Trucks and LCVs, 2003-5 (Units and Change %) .....	33
Structure of the Russian Passenger Car Market, 2003-5 (%).....	35
Russian Car Imports by Country, 2003-5 (Share %) .....	36
3.6 SLOVAKIA .....	37
New Registrations of Cars and LCVs in Slovakia, 2005 (Units) .....	38
Background on the Slovakian Automotive Industry .....	40
3.7 TURKEY .....	41
Location of Turkish Vehicle Manufacturers.....	42
Turkish Vehicle Production by Manufacturer, 2003-5 (Units) .....	43
Turkish Domestic Automotive Sales in 2003-2005 .....	43
Turkish Vehicle Fleet by Vehicle Type, 2003-2005 .....	44
Domestic Vehicle Sales, 2003-2005 (Units).....	45
Turkish Vehicle Exports, 2003-2005 (Units).....	45
Background on Major OEMs in Turkey .....	46
Background on Major OEMs in Turkey .....	47
3.8 UKRAINE.....	49
Ukrainian Vehicle Production, 2003-2005 (Units) .....	49
Ukrainian Passenger Car Sales, 2003-2005 (Units).....	51



<b>4. AUTOMOTIVE OEM COATINGS</b> .....	<b>59</b>
4.1 BELARUS .....	59
4.2 CZECH REPUBLIC .....	63
Market Shares in the Czech Automotive OEM Coatings Market, 2005 (%) .....	63
4.3 HUNGARY .....	64
4.4 POLAND .....	65
Split of the Polish Automotive OEM Coatings Market by Coating Type, 2005 (%) .....	65
Market Shares in the Polish Automotive OEM Coatings Market, 2006 (%) .....	66
4.5 RUSSIA .....	67
Annual Production of Russian Automotive OEM Coatings Manufacturers, 2004-5 (Tonnes).....	67
Major Export Suppliers of Automotive OEM Coatings in Russia, 2005 (%) .....	68
Market Shares in the Russian Automotive Topcoat Market, 2005 (%).....	70
4.6 SLOVAKIA .....	73
Major Suppliers of Automotive OEM Coatings in Slovakia, 2005 (%).....	74
4.7 TURKEY .....	75
4.8 UKRAINE.....	75
<b>5. AUTOMOTIVE REFINISH</b> .....	<b>79</b>
5.1 BELARUS .....	79
Split of the Belarusian Automotive Refinish Market by Technology, 2005 (%) .....	80
Split of the Belarusian Automotive Refinish Market by Grade, 2005 (%) .....	81
5.2 CZECH REPUBLIC .....	83
Split of the Czech Refinish Market by Grade, 2005 (%) .....	84
Split of the Czech Refinish Market by Technology, 2005 (%) .....	85
5.3 HUNGARY .....	85
5.4 POLAND .....	87
Market Shares in the Polish Automotive Refinish Segment, 2005 (%) .....	87
5.5 RUSSIA .....	89
Split of the Russian Automotive Refinish Market by Grade, 2005 (%) .....	90
Split of the Russian Automotive Refinish Market by Technology, 2005 (Tonnes and %) .....	92
5.6 SLOVAKIA .....	95
Split of the Slovakian Refinish Market by Grade, 2005 (%) .....	96
Split of the Slovak Refinish Market by Technology, 2006 (%) .....	97
5.7 TURKEY .....	98
Market Shares in the Turkish Automotive Refinish Market, 2005 (%) .....	98
5.8 UKRAINE.....	99
Split of the Ukrainian Automotive Refinish Market by Grade, 2006 (%).....	100
Brand Shares in the Ukrainian Premium Refinish Segment, 2006 (%).....	101
Main Players in the Ukrainian Medium Refinish Segment, 2005 (%) .....	102
Split of the Ukrainian Automotive Refinish Market by Technology, 2005 (%) .....	104
<b>6. POWDER COATINGS</b> .....	<b>107</b>
6.1 BELARUS .....	107
Split of the Belarusian Powder Coatings Market By Technology, 2005 (%).....	108
Split of the Belarusian Powder Coatings Market by Application, 2006 (%).....	108
6.2 CZECH REPUBLIC .....	109
Split of the Czech Powder Coatings Market by Application, 2005 (%).....	110
Split of the Czech Powder Coatings Market by Technology, 2005 (%) .....	111
Market Shares in the Czech Powder Coatings Market, 2005 (%).....	111
6.3 HUNGARY.....	112
Structure of the Hungarian Powder Coatings Market, 2005 .....	112
Split of the Hungarian Powder Coatings Market by Technology, 2006 (%).....	113
Split of the Hungarian Powder Coatings Market by Application, 2005 (%).....	113
6.4 POLAND .....	114
Market Shares in the Polish Powder Coatings Market, 2005 (%).....	115
Split of the Polish Powder Coatings Market by Technology, 2006 (%) .....	115
Split of the Polish Powder Coatings Market by Application, 2006 (%).....	116
6.5 RUSSIA .....	116
Share of the Russian Powder Coatings Market by Source, 2005 (%) .....	118
Split of the Russian Powder Coatings Market By Technology, 2005 (%).....	119
Split of the Russian Market for Powder Coatings by Application, 2005 (%) .....	120
6.6 SLOVAKIA .....	123
Slovakian Powder Coatings Market by Application, 2005 (%) .....	123



	Market Shares in the Slovakian Powder Coatings Market, 2005 (%).....	124
6.7	TURKEY .....	125
	Powder Coatings Production and Demand in Turkey, 2002-5 (Tonnes and Growth %) .....	125
	Comparison of Company Market Shares in the Turkish Powder Coatings Market in 2002 and 2005 (%).....	125
	Comparison of Technology Market Shares in the Turkish Powder Coatings Market in 2002 and 2005 (%) .....	126
	Split of the Turkish Powder Coatings Market by Application, 2005 (%) .....	126
6.8	UKRAINE.....	127
	Market Shares of Ukrainian Powder Coatings Imports, 2005 (%).....	128
	Split of the Ukrainian Powder Coatings Market by Technology, 2005 (%) .....	129
	Split of the Ukrainian Powder Coatings Market by Application, 2005 (%).....	130
<b>7.</b>	<b>COATINGS FOR PLASTICS.....</b>	<b>133</b>
7.1	BELARUS .....	133
7.2	CZECH REPUBLIC .....	136
7.3	HUNGARY.....	137
	Split of the Hungarian Coatings for Plastics Market by Technology, 2006 (%).....	137
7.4	POLAND .....	138
	Split of the Polish Coatings for Plastics Market by Application, 2006 (%).....	138
	Split of the Polish Coatings for Plastics Market by Technology Use, 2006 (%).....	140
7.5	RUSSIA .....	140
	Russian Coatings for Plastics Market by Technology, 2005 (%).....	141
7.6	SLOVAKIA .....	144
	Split of the Slovakian Coatings for Plastics Market by Technology, 2005 (%).....	144
7.7	TURKEY .....	145
	Split of the Turkish Coatings for Plastics Market by Application, 2005 (%).....	145
	Split of the Turkish Coatings for Plastics Market by Application, 2005 (%).....	146
7.8	UKRAINE.....	146
	Consumption of Coatings For Plastics for ZAZ Cars (kg).....	147
<b>8.</b>	<b>MARKET FORECAST .....</b>	<b>149</b>
	Summary of Automotive Related Coatings Demand in Selective Eastern European Countries 2005 (Tonnes).....	149
	Applied Growth Rates, 2005-2010 (% pa).....	150
	Forecast of Automotive Related Coatings Demand in Selective Eastern European Countries 2010 (Tonnes).....	150
<b>9.</b>	<b>AUTOMOTIVE INDUSTRY ORGANISATIONS AND ASSOCIATIONS .....</b>	<b>151</b>
9.1	BELARUS .....	151
9.2	CZECH REPUBLIC .....	151
9.3	HUNGARY.....	151
9.4	POLAND .....	151
9.5	RUSSIA .....	151
9.6	SLOVAK REPUBLIC .....	152
9.7	TURKEY .....	152
9.8	UKRAINE.....	152
<b>10.</b>	<b>DIRECTORY OF MANUFACTURERS .....</b>	<b>153</b>
10.1	BELARUS .....	153
10.2	CZECH REPUBLIC .....	155
10.3	HUNGARY.....	157
10.4	POLAND .....	159
10.5	RUSSIA .....	165
10.6	SLOVAKIA .....	177
10.7	TURKEY .....	179
10.8	UKRAINE.....	193