

# SAINT-GOBAIN: REGIONAL DEVELOPMENT IN RUSSIA

CONFERENCE
AEB REAL ESTATE DAY 2016

**SEPTEMBER 22<sup>ND</sup> – MOSCOW** 



## WORLD LEADER IN HABITAT

2015 net sales

€39.6 BN

More than 170,000 employees and 98 nationalities

represented

Present in

66 countries

More than 80% of sales are made in the habitat markets: construction, renovation, infrastructures and civil engineering



More than **4,000** sales outlets

Created more than

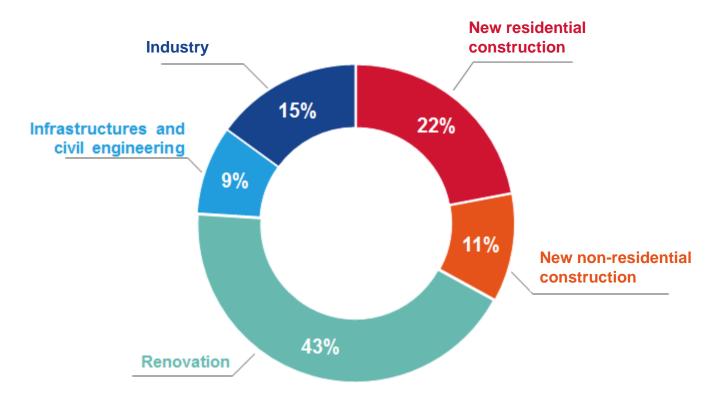
350 years ago

One of the top 100 industrial

**groups** in the world with around 950 production sites



#### **OUR REFERENCE MARKET: CONSTRUCTION**





#### WE BELIEVE IN POTENTIAL OF THE RUSSIAN MARKET

#### ■ Housing per capita

Russia: 22-25 m<sup>2</sup> Europe: 45 m<sup>2</sup>

**▼** Average energy consumption in residential buildings

Russia: 350 kWt·h/m<sup>2</sup>, Europe: from 24 to 47% lower depending on the type of building



### **INDUSTRIAL PRESENCE IN RUSSIA**





#### FACTORS INFLUENCING THE CHOICE OF A REGION

- Availability of raw materials
- Infrastructure gradations in the region
- Availability of qualified manpower
  - Professional education system, salary level, employee turnover etc.
- Presence of competitors` production capacity in the region

Investment potential



#### Congenial investment climate

- Legislative and institutional system to attract investors
- Regular support from the regional authorities



#### Access to market outlets

- Equal location of production facilities in the regions with large volume and high potential for construction growth
- Favorable geographical position. Reduction of transport cost

#### REGIONS ARE LEADERS IN COMMISSIONING OF NEW HOUSING

- 1. Large volume of new housing construction / high investment potential / favorable investment climate
  - 1) Krasnodar region
  - 2) Moscow

- 3) Tatarstan
- 4) Bashkortostan
- 2. Large volume of new housing construction / high investment potential
  - 1) Moscow region
  - 2) Saint Peterburg
  - 3) Sverdlovsk region

- 4) Rostov region
- 5) Leningrad region
- 6) Novosibirsk region
- 3. High rate of commissioning per capita / favorable investment climate
  - 1) Tyumen region
  - Belgorod region
  - 3) Lipetsk region

- 4) Kaluga region
- 5) Tambov region









#### **ENERGY EFFICIENCY IMPROVEMENT IS A DRIVER OF THE ECONOMY**



#### ПРАВИТЕЛЬСТВО РОССИЙСКОЙ ФЕДЕРАЦИИ

РАСПОРЯЖЕНИЕ

от 1 сентября 2016 г. № 1853-р москва

- Утвердить прилагаемый план мероприятий ("дорожную карту") по повышению энергетической эффективности зданий, строений и сооружений (далее - план).
- Федеральным органам исполнительной власти, ответственным за реализацию плана, ежекваргально, до 10-го числа месяца, спедующего за отчетным икварталом, представлять в Минстрой России информацию о ходе реализации плана.
- Минстрою России осуществлять мониторинг и контроль реализации плана и ежензартально, до 20-го числа месяца, спедующего за отчетным кварталом, представлять в Правительство Российской Федерации доклад о ходе реализации плана.

Председатель Правительства Российской Федерации

Д.Медведев

Action plan ("The Roadmap")
for the Buildings` Energy Efficiency
Improvement was approved
by the Russian Government on Sept 1, 2016
(Order № 1853-p)

- ▼ Federal level: improvement of technical and legal regulation of energy efficiency standards in buildings for new construction
- Regional level: implementation of mandatory energy efficiency measures during overhaul of the existing housing



