

# **The European Market for Thermal Insulation Products**

**Volume 13 – Other Eastern European  
Countries (Baltic States, Bulgaria, Romania,  
Slovakia, Slovenia)**

**© IAL CONSULTANTS  
APRIL 2009**

CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL  
Tel: +44 (0) 20 8832 7780 Fax: +44 (0) 20 8566 4931  
Email: [ial@brg.co.uk](mailto:ial@brg.co.uk)  
Web site: [www.ialconsultants.com](http://www.ialconsultants.com)

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 IAL 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 IAL Consultants 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 IAL CONSULTANTS**

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 IAL Consultants published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website :

**[www.ialconsultants.com](http://www.ialconsultants.com)**

---

# CONTENTS

<b>1. INTRODUCTION.....</b>	<b>1</b>
1.1 SCOPE OF THE STUDY .....	1
1.2 METHODOLOGY.....	1
1.3 PRODUCTS COVERED .....	1
1.3.1 Mineral Fibres .....	1
1.3.2 Expanded Polystyrene (EPS) .....	2
1.3.3 Extruded Polystyrene (XPS).....	2
1.3.4 Polyurethane Foams .....	2
1.3.5 Phenolic Foams.....	3
1.3.6 Flexible Insulation .....	4
1.4 END-USE SECTORS .....	4
1.4.1 Building.....	4
1.4.2 Industrial.....	4
1.5 PRICES .....	5
1.5.1 Baltic States.....	6
1.5.2 Bulgaria .....	7
1.5.3 Romania .....	8
1.5.4 Slovakia.....	9
1.5.5 Slovenia.....	10
1.6 UNITS OF VOLUME.....	11
1.6.1 Baltic States.....	12
1.6.2 Bulgaria .....	13
1.6.3 Romania .....	14
1.6.4 Slovakia.....	15
1.6.5 Slovenia.....	16
1.7 FORECASTS .....	17
<b>2. MARKET SUMMARY AND FORECASTS TO 2013 .....</b>	<b>19</b>
2.1 MARKET REVIEW 2008 .....	19
2.1.1 Other Eastern European Countries.....	19
2.1.2 Baltic States.....	22
2.1.3 Bulgaria .....	25
2.1.4 Romania .....	28
2.1.5 Slovakia.....	31
2.1.6 Slovenia.....	34
2.2 MARKET FORECAST 2013.....	37
2.2.1 Other Eastern European Countries.....	37
2.2.2 Baltic States.....	40
2.2.3 Bulgaria .....	43
2.2.4 Romania .....	46
2.2.5 Slovakia.....	49
2.2.6 Slovenia.....	52
<b>3. MARKET REVIEW .....</b>	<b>55</b>
3.1 MARKET REVIEW BY MATERIAL TYPE, 2008-2013 .....	55
3.1.1 Other Eastern European Countries.....	55
3.1.2 Baltic States.....	56
3.1.3 Bulgaria .....	58
3.1.4 Romania .....	59
3.1.5 Slovakia.....	61
3.1.6 Slovenia.....	62
3.2 MARKET BY END-USE APPLICATION, 2008-2013 .....	64
3.2.1 Other Eastern European Countries.....	64

3.2.2	<i>Baltic States</i> .....	65
3.2.3	<i>Bulgaria</i> .....	67
3.2.4	<i>Romania</i> .....	68
3.2.5	<i>Slovakia</i> .....	70
3.2.6	<i>Slovenia</i> .....	71
3.3	MARKET IN BUILDING & INDUSTRY, 2008 .....	73
3.3.1	<i>Other Eastern European Countries</i> .....	73
3.3.2	<i>Baltic States</i> .....	74
3.3.3	<i>Bulgaria</i> .....	76
3.3.4	<i>Romania</i> .....	77
3.3.5	<i>Slovakia</i> .....	79
3.3.6	<i>Slovenia</i> .....	80
3.4	GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2008-2013 .....	82
3.4.1	<i>Other Eastern European Countries</i> .....	82
3.4.2	<i>Baltic States</i> .....	83
3.4.3	<i>Bulgaria</i> .....	84
3.4.4	<i>Romania</i> .....	85
3.4.5	<i>Slovakia</i> .....	86
3.4.6	<i>Slovenia</i> .....	87
3.5	GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE, 2008-2013 .....	88
3.5.1	<i>Other Eastern European Countries</i> .....	88
3.5.2	<i>Baltic States</i> .....	89
3.5.3	<i>Bulgaria</i> .....	90
3.5.4	<i>Romania</i> .....	91
3.5.5	<i>Slovakia</i> .....	92
3.5.6	<i>Slovenia</i> .....	93
<b>4.</b>	<b>MARKET INFLUENCES .....</b>	<b>95</b>
4.1	MACROECONOMIC TRENDS .....	95
4.1.1	<i>GDP (Gross Domestic Product)</i> .....	95
4.1.2	<i>Baltic States</i> .....	96
4.1.3	<i>Bulgaria</i> .....	99
4.1.4	<i>Romania</i> .....	100
4.1.5	<i>Slovenia</i> .....	101
4.1.6	<i>Slovakia</i> .....	102
4.2	MATERIAL TRENDS AFFECTING OTHER EASTERN EUROPEAN INSULATION MARKETS..	103
4.2.1	<i>Mineral wool</i> .....	103
4.2.2	<i>Expanded Polystyrene</i> .....	103
4.2.3	<i>Extruded Polystyrene</i> .....	104
4.2.4	<i>PUR/PIR</i> .....	104
4.2.5	<i>Phenolics</i> .....	104
<b>5.</b>	<b>SUPPLIERS AND MANUFACTURERS OF THERMAL INSULATION PRODUCTS .....</b>	<b>105</b>
5.1	MARKET SHARES OF LEADING INSULATION SUPPLIERS .....	105
5.2	PROFILES OF KEY SUPPLIERS .....	110
5.2.1	<i>Armacell</i> .....	110
5.2.2	<i>BASF</i> .....	113
5.2.3	<i>CRH</i> .....	117
5.2.4	<i>Dow Chemical</i> .....	120
5.2.5	<i>Kingspan</i> .....	124
5.2.6	<i>Knauf Insulation</i> .....	129
5.2.7	<i>URSA</i> .....	132
5.2.8	<i>Recticel</i> .....	135
5.2.9	<i>Rockwool</i> .....	139
5.2.10	<i>Saint-Gobain Isover</i> .....	142
5.3	DIRECTORY OF SUPPLIERS .....	145
5.3.1	<i>Bulgaria</i> .....	145
5.3.2	<i>Estonia</i> .....	147
5.3.3	<i>Latvia</i> .....	147
5.3.4	<i>Lithuania</i> .....	148

5.3.5	Romania .....	149
5.3.6	Slovakia .....	151
5.3.7	Slovenia .....	153
<b>6.</b>	<b>SOURCES OF INFORMATION.....</b>	<b>155</b>
6.1	AUSTRIA .....	155
6.2	BELGIUM .....	155
6.3	CZECH REPUBLIC .....	156
6.4	DENMARK .....	156
6.5	FINLAND .....	156
6.6	FRANCE.....	157
6.7	GERMANY .....	157
6.8	IRELAND .....	158
6.9	ITALY.....	158
6.10	NETHERLANDS.....	159
6.11	NORWAY.....	159
6.12	POLAND .....	159
6.13	PORTUGAL .....	159
6.14	ROMANIA.....	160
6.15	SLOVENIA.....	160
6.16	SPAIN .....	160
6.17	SWEDEN .....	161
6.18	SWITZERLAND .....	162
6.19	TURKEY .....	162
6.20	UNITED KINGDOM.....	162
<b>7.</b>	<b>ACKNOWLEDGEMENTS.....</b>	<b>163</b>

---



# TABLE OF TABLES

<b>1.</b>	<b>INTRODUCTION.....</b>	<b>1</b>
1.1	SCOPE OF THE STUDY .....	1
1.2	METHODOLOGY.....	1
1.3	PRODUCTS COVERED .....	1
1.4	END-USE SECTORS .....	4
1.5	PRICES .....	5
	Prices Used, €/m <sup>3</sup> (2008) .....	6
	Prices Used, €/m <sup>3</sup> (2008) .....	7
	Prices Used, €/m <sup>3</sup> (2008) .....	8
	Prices Used, €/m <sup>3</sup> (2008) .....	9
	Prices Used, €/m <sup>3</sup> (2008) .....	10
1.6	UNITS OF VOLUME.....	11
	Densities Used, kg/m <sup>3</sup> (2008) .....	12
	Densities Used, kg/m <sup>3</sup> (2008) .....	13
	Densities Used, kg/m <sup>3</sup> (2008) .....	14
	Densities Used, kg/m <sup>3</sup> (2008) .....	15
	Densities Used, kg/m <sup>3</sup> (2008) .....	16
1.7	FORECASTS .....	17
<b>2.</b>	<b>MARKET SUMMARY AND FORECASTS TO 2013 .....</b>	<b>19</b>
2.1	MARKET REVIEW 2008 .....	19
	Total Other Eastern European Thermal Insulation Market Volume by Type and End-use, 2008 (m <sup>3</sup> ).....	19
	Total Other Eastern European Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes).....	20
	Total Other Eastern European Thermal Insulation Market Value by Type and End-use, 2008 (Million €).....	21
	Total Baltic States Thermal Insulation Market Volume by Type and End-use, 2008 (m <sup>3</sup> ).....	22
	Total Baltic States Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes).....	23
	Total Baltic States Thermal Insulation Market Value by Type and End-use, 2008 (€Million).....	24
	Total Bulgarian Thermal Insulation Market Volume by Type and End-use, 2008 (m <sup>3</sup> ) .....	25
	Total Bulgarian Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes).....	26
	Total Bulgarian Thermal Insulation Market Value by Type and End-use, 2008 (€Million) .....	27
	Total Romanian Thermal Insulation Market Volume by Type and End-use, 2008 (m <sup>3</sup> ) .....	28
	Total Romanian Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes) .....	29
	Total Romanian Thermal Insulation Market Value by Type and End-use, 2008 (€Million) .....	30
	Total Slovakian Thermal Insulation Market Volume by Type and End-use, 2008 (m <sup>3</sup> ).....	31
	Total Slovakian Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes).....	32
	Total Slovakian Thermal Insulation Market Value by Type and End-use, 2008 (€Million).....	33
	Total Slovenian Thermal Insulation Market Volume by Type and End-use, 2008 (m <sup>3</sup> ).....	34
	Total Slovenian Thermal Insulation Market Volume by Type and End-use, 2008 (Tonnes).....	35
	Total Slovenian Thermal Insulation Market Value by Type and End-use, 2008 (€Million).....	36
2.2	MARKET FORECAST 2013.....	37
	Total Other Eastern European Thermal Insulation Market Volume by Type and End-use, 2013 (m <sup>3</sup> ).....	37
	Total Other Eastern European Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes).....	38
	Total Other Eastern European Thermal Insulation Market Value by Type and End-use, 2013 (€Million).....	39
	Total Baltic States Thermal Insulation Market Volume by Type and End-use, 2013 (m <sup>3</sup> ).....	40
	Total Baltic States Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes).....	41
	Total Baltic States Thermal Insulation Market Value by Type and End-use, 2013 (€Million).....	42
	Total Bulgarian Thermal Insulation Market Volume by Type and End-use, 2013 (m <sup>3</sup> ) .....	43
	Total Bulgarian Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes).....	44
	Total Bulgarian Thermal Insulation Market Value by Type and End-use, 2013 (€Million) .....	45
	Total Romanian Thermal Insulation Market Volume by Type and End-use, 2013 (m <sup>3</sup> ) .....	46
	Total Romanian Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes) .....	47
	Total Romanian Thermal Insulation Market Value by Type and End-use, 2013 (€Million) .....	48
	Total Slovakian Thermal Insulation Market Volume by Type and End-use, 2013 (m <sup>3</sup> ) .....	49
	Total Slovakian Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes).....	50
	Total Slovakian Thermal Insulation Market Value by Type and End-use, 2013 (€Million).....	51
	Total Slovenian Thermal Insulation Market Volume by Type and End-use, 2013 (m <sup>3</sup> ).....	52
	Total Slovenian Thermal Insulation Market Volume by Type and End-use, 2013 (Tonnes).....	53
	Total Slovenian Thermal Insulation Market Value by Type and End-use, 2013 (€Million).....	54

<b>3.</b>	<b>MARKET REVIEW</b>	<b>55</b>
3.1	MARKET REVIEW BY MATERIAL TYPE, 2008-2013	55
	The Other Eastern European Thermal Insulation Market by Type, 2008-2013 (m <sup>3</sup> )	55
	The Other Eastern European Thermal Insulation Market by Type, 2008-2013 (Tonnes)	55
	The Other Eastern European Thermal Insulation Market by Type, 2008-2013 (€Million)	56
	The Baltic States Thermal Insulation Market by Type, 2008-2013 (m <sup>3</sup> )	56
	The Baltic States Thermal Insulation Market by Type, 2008-2013 (Tonnes)	57
	The Baltic States Thermal Insulation Market by Type, 2008-2013 (€Million)	57
	The Bulgarian Thermal Insulation Market by Type, 2008-2013 (m <sup>3</sup> )	58
	The Bulgarian Thermal Insulation Market by Type, 2008-2013 (Tonnes)	58
	The Bulgarian Thermal Insulation Market by Type, 2008-2013 (€Million)	59
	The Romanian Thermal Insulation Market by Type, 2008-2013 (m <sup>3</sup> )	59
	The Romanian Thermal Insulation Market by Type, 2008-2013 (Tonnes)	60
	The Romanian Thermal Insulation Market by Type, 2008-2013 (€Million)	60
	The Slovakian Thermal Insulation Market by Type, 2008-2013 (m <sup>3</sup> )	61
	The Slovakian Thermal Insulation Market by Type, 2008-2013 (Tonnes)	61
	The Slovakian Thermal Insulation Market by Type, 2008-2013 (€Million)	62
	The Slovenian Thermal Insulation Market by Type, 2008-2013 (m <sup>3</sup> )	62
	The Slovenian Thermal Insulation Market by Type, 2008-2013 (Tonnes)	63
	The Slovenian Thermal Insulation Market by Type, 2008-2013 (€Million)	63
3.2	MARKET BY END-USE APPLICATION, 2008-2013	64
	Other Eastern European Thermal Insulation Market by End-use, 2008-2013 (m <sup>3</sup> )	64
	Other Eastern European Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	64
	Other Eastern European Thermal Insulation Market by End-use, 2008-2013 (€Million)	65
	The Baltic States Thermal Insulation Market by End-use, 2008-2013 (m <sup>3</sup> )	65
	The Baltic States Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	66
	The Baltic States Thermal Insulation Market by End-use, 2008-2013 (€Million)	66
	The Bulgarian Thermal Insulation Market by End-use, 2008-2013 (m <sup>3</sup> )	67
	The Bulgarian Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	67
	The Bulgarian Thermal Insulation Market by End-use, 2008-2013 (€Million)	68
	The Romanian Thermal Insulation Market by End-use, 2008-2013 (m <sup>3</sup> )	68
	The Romanian Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	69
	The Romanian Thermal Insulation Market by End-use, 2008-2013 (€Million)	69
	The Slovakian Thermal Insulation Market by End-use, 2008-2013 (m <sup>3</sup> )	70
	The Slovakian Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	70
	The Slovakian Thermal Insulation Market by End-use, 2008-2013 (€Million)	71
	The Slovenian Thermal Insulation Market by End-use, 2008-2013 (m <sup>3</sup> )	71
	The Slovenian Thermal Insulation Market by End-use, 2008-2013 (Tonnes)	72
	The Slovenian Thermal Insulation Market by End-use, 2008-2013 (€Million)	72
3.3	MARKET IN BUILDING & INDUSTRY, 2008	73
	Other Eastern European Market for Thermal Insulation in Building and Industry, 2008 (m <sup>3</sup> )	73
	Other Eastern European Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	73
	Other Eastern European Market for Thermal Insulation in Building and Industry, 2008 (€Million)	74
	The Baltic States Market for Thermal Insulation in Building and Industry, 2008 (m <sup>3</sup> )	74
	The Baltic States Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	75
	The Baltic States Market for Thermal Insulation in Building and Industry, 2008 (€Million)	75
	The Bulgarian Market for Thermal Insulation in Building and Industry, 2008 (m <sup>3</sup> )	76
	The Bulgarian Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	76
	The Bulgarian Market for Thermal Insulation in Building and Industry, 2008 (€Million)	77
	The Romanian Market for Thermal Insulation in Building and Industry, 2008 (m <sup>3</sup> )	77
	The Romanian Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	78
	The Romanian Market for Thermal Insulation in Building and Industry, 2008 (€Million)	78
	The Slovakian Market for Thermal Insulation in Building and Industry, 2008 (m <sup>3</sup> )	79
	The Slovakian Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	79
	The Slovakian Market for Thermal Insulation in Building and Industry, 2008 (€Million)	80
	The Slovenian Market for Thermal Insulation in Building and Industry, 2008 (m <sup>3</sup> )	80
	The Slovenian Market for Thermal Insulation in Building and Industry, 2008 (Tonnes)	81
	The Slovenian Market for Thermal Insulation in Building and Industry, 2008 (€Million)	81
3.4	GROWTH IN THERMAL INSULATION CONSUMPTION BY MATERIAL TYPE, 2008-2013	82
	% Growth Rates for Thermal Insulation by Material Type in Other Eastern Countries, 2008-2013 (m <sup>3</sup> )	82
	% Growth Rates for Thermal Insulation by Material Type in Other Eastern Countries, 2008-2013 (Tonnes)	82
	% Growth Rates for Thermal Insulation by Material Type in the Baltic States, 2008-2013 (m <sup>3</sup> )	83
	% Growth Rates for Thermal Insulation by Material Type in the Baltic States, 2008-2013 (Tonnes)	83
	% Growth Rates for Thermal Insulation by Material Type in Bulgaria, 2008-2013 (m <sup>3</sup> )	84
	% Growth Rates for Thermal Insulation by Material Type in Bulgaria, 2008-2013 (Tonnes)	84

	% Growth Rates for Thermal Insulation by Material Type in Romania, 2008-2013 (m <sup>3</sup> ).....	85
	% Growth Rates for Thermal Insulation by Material Type in Romania, 2008-2013 (Tonnes).....	85
	% Growth Rates for Thermal Insulation by Material Type in Slovakia, 2008-2013 (m <sup>3</sup> ).....	86
	% Growth Rates for Thermal Insulation by Material Type in Slovakia, 2008-2013 (Tonnes).....	86
	% Growth Rates for Thermal Insulation by Material Type in Slovenia, 2008-2013 (m <sup>3</sup> ).....	87
	% Growth Rates for Thermal Insulation by Material Type in Slovenia, 2008-2013 (Tonnes).....	87
3.5	<b>GROWTH IN THERMAL INSULATION CONSUMPTION BY END-USE, 2008-2013</b> .....	88
	% Growth Rates for Thermal Insulation by End-use in Other Eastern Countries, 2008-2013 (m <sup>3</sup> ).....	88
	% Growth Rates for Thermal Insulation by End-use in Other Eastern Countries, 2008-2013 (Tonnes).....	88
	% Growth Rates for Thermal Insulation by End-use in the Baltic States, 2008-2013 (m <sup>3</sup> ).....	89
	% Growth Rates for Thermal Insulation by End-use in the Baltic States, 2008-2013 (Tonnes).....	89
	% Growth Rates for Thermal Insulation by End-use in Bulgaria, 2008-2013 (m <sup>3</sup> ).....	90
	% Growth Rates for Thermal Insulation by End-use in Bulgaria, 2008-2013 (Tonnes).....	90
	% Growth Rates for Thermal Insulation by End-use in Romania, 2008-2013 (m <sup>3</sup> ).....	91
	% Growth Rates for Thermal Insulation by End-use in Romania, 2008-2013 (Tonnes).....	91
	% Growth Rates for Thermal Insulation by End-use in Slovakia, 2008-2013 (m <sup>3</sup> ).....	92
	% Growth Rates for Thermal Insulation by End-use in Slovakia, 2008-2013 (Tonnes).....	92
	% Growth Rates for Thermal Insulation by End-use in Slovenia, 2008-2013 (m <sup>3</sup> ).....	93
	% Growth Rates for Thermal Insulation by End-use in Slovenia, 2008-2013 (Tonnes).....	93
<b>4.</b>	<b>MARKET INFLUENCES</b> .....	<b>95</b>
4.1	<b>MACROECONOMIC TRENDS</b> .....	95
	GDP for Other European Countries, 2005 – 2009(E).....	95
	Estonian Expenditure in Construction, 2004 – 2007 (Million Kroons).....	96
	Latvian Expenditure in Construction, 2005 – 2008 (Thousand Lats).....	97
	Construction Investment in Lithuania, 200-2007 (M LTL).....	98
	New Building Construction in Bulgaria, 2004-2008 (units).....	99
	Construction Activity, by Ownership, in Romania, 2003 - 2006.....	100
	New Buildings Completed in Slovenia, 2003 – 2007 (Number of Units).....	101
	Construction Volume in Slovakia by Type, 2008-2011 (€Million/Annual % change).....	102
4.2	<b>MATERIAL TRENDS AFFECTING OTHER EASTERN EUROPEAN INSULATION MARKETS..</b>	103
<b>5.</b>	<b>SUPPLIERS AND MANUFACTURERS OF THERMAL INSULATION PRODUCTS</b> .....	<b>105</b>
5.1	<b>MARKET SHARES OF LEADING INSULATION SUPPLIERS</b> .....	105
	Leading Suppliers of Thermal Insulation in the Baltic States.....	105
	Leading Suppliers of Thermal Insulation in Bulgaria.....	106
	Leading Suppliers of Thermal Insulation in Romania.....	107
	Leading Suppliers of Thermal Insulation in Slovakia.....	108
	Leading Suppliers of Thermal Insulation in Slovenia.....	109
5.2	<b>PROFILES OF KEY SUPPLIERS</b> .....	110
	BASF Group Sales by Business Segment, 2007 & 2008 (€Million).....	113
	BASF Group Sales by Location of Customer, 2007 & 2008 (€Million).....	114
	BASF Plastics Division Sales, 2008 (€Million).....	114
	CRH Group Sales by Region, 2007-2008 (€Million).....	118
	CRH Group: Sales by Business Segment, 2007-2008 (€Million).....	118
	The Dow Chemical Company: Group Sales by Region, 2006-2008 (US\$ Million).....	121
	The Dow Chemical Company Group: Sales by Business Segment, 2006-2008 (US\$ Million).....	121
	Dow's European Manufacturing Sites for Styrofoam and Polyurethanes.....	123
	Table of Materials, Brand Names and Applications Available from Knauf.....	130
	Table of Knauf Production Sites in Europe for the Production of Insulation.....	131
	Uralita's Financial Results by Business Group, 2008 (%).....	133
	Recticel International: Net Sales by Business Segment, 2007-2008 (€Million).....	136
	Recticel Insulation: Net Sales by Business Segment, 2006-2007 (€Million).....	136
	Rockwool Group Sales by Region, 2008 (%).....	140
5.3	<b>DIRECTORY OF SUPPLIERS</b> .....	145
<b>6.</b>	<b>SOURCES OF INFORMATION</b> .....	<b>155</b>
6.1	<b>AUSTRIA</b> .....	155
6.2	<b>BELGIUM</b> .....	155
6.3	<b>CZECH REPUBLIC</b> .....	156
6.4	<b>DENMARK</b> .....	156
6.5	<b>FINLAND</b> .....	156
6.6	<b>FRANCE</b> .....	157
6.7	<b>GERMANY</b> .....	157

6.8	IRELAND .....	158
6.9	ITALY.....	158
6.10	NETHERLANDS.....	159
6.11	NORWAY.....	159
6.12	POLAND .....	159
6.13	PORTUGAL .....	159
6.14	ROMANIA.....	160
6.15	SLOVENIA.....	160
6.16	SPAIN .....	160
6.17	SWEDEN .....	161
6.18	SWITZERLAND .....	162
6.19	TURKEY .....	162
6.20	UNITED KINGDOM.....	162
<b>7.</b>	<b>ACKNOWLEDGEMENTS.....</b>	<b>163</b>