

IAL MARKET GUIDE

SANDWICH PANEL MANUFACTURERS IN WESTERN EUROPE 2010

**© IAL CONSULTANTS
MARCH 2010**

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
Web site: 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

CONTENTS

1. INTRODUCTION.....	1
1.1 SCOPE OF STUDY.....	1
1.2 MATERIAL USAGE.....	2
1.2.1 Inner Core Material.....	2
1.2.2 Outer Skin Material.....	11
2. TECHNICAL BACKGROUND.....	21
2.1 PANEL TYPES AND BACKGROUND.....	21
2.1.1 Introduction.....	21
2.1.2 Production Methods.....	22
3. COMPANY PROFILES.....	27
3.1 AUSTRIA.....	27
3.1.1 Brucha GmbH.....	27
3.1.2 Pflaum & Söhne Bausysteme GmbH.....	29
3.2 BELGIUM.....	31
3.2.1 Baeck Aluminium NV.....	31
3.2.2 Garmat Europe NV.....	33
3.2.3 Isobar NV.....	35
3.2.4 IsocabNV.....	37
3.2.5 Isometall.....	39
3.2.6 NV Joris Ide.....	41
3.2.7 Unilin Systems bvba.....	43
3.3 DENMARK.....	45
3.3.1 DC System Insulation A/S.....	45
3.4 FINLAND.....	47
3.4.1 Huurre Insulation Oy.....	47
3.4.2 Paroc Panel System.....	49
3.4.3 Rautaruukki Oyj.....	51
3.4.4 ThermiSol Oy.....	53
3.5 FRANCE.....	55
3.5.1 ArcelorMittal Construction.....	55
3.5.2 Carlier Plastiques SAS.....	57
3.5.3 Dagard.....	59
3.5.4 FRAPPA SAS.....	61
3.5.5 IPM - Mondia.....	63
3.5.6 Isocab France.....	65
3.5.7 Isocomposites.....	67
3.5.8 Klege Europ - Sainte-Marie Construction Isothermes.....	69
3.5.9 Knauf SNC.....	71
3.5.10 Oxatherm.....	73
3.5.11 Plasteurop -SAS Panelco.....	75
3.5.12 Polyfont SAS.....	77
3.5.13 SAIRP Composites.....	79
3.5.14 Sodistra Fabrication Isothermes Composites.....	81
3.5.15 Stratiforme Industries.....	83
3.5.16 Toutenkamion SA.....	85
3.6 GERMANY.....	87
3.6.1 Aluform System GmbH & Co. KG.....	87
3.6.2 Celltherm Isolierung GmbH.....	89
3.6.3 Fischer Profil GmbH.....	91
3.6.4 Freva Sandwichsysteme GmbH.....	93
3.6.5 Gabler Kühlraum GmbH.....	95

3.6.6	<i>Ilkazell Isoliertechnik GmbH</i>	97
3.6.7	<i>IsoBouw Dämmtechnik GmbH</i>	99
3.6.8	<i>Metecno Bausysteme GmbH</i>	101
3.6.9	<i>Narr Isoliersysteme GmbH</i>	103
3.6.10	<i>Pfeuffer GmbH</i>	105
3.6.11	<i>Roma Dämmsysteme GmbH & Co</i>	107
3.6.12	<i>Salzgitter Bauelemente GmbH</i>	109
3.6.13	<i>Teledoor Melle Isoliertechnik GmbH</i>	111
3.6.14	<i>ThyssenKrupp Bausysteme GmbH</i>	113
3.6.15	<i>Viessmann Kältetechnik AG</i>	115
3.7	GREECE	117
3.7.1	<i>Corus-Kalpinis-Simos S.A.</i>	117
3.7.2	<i>Isobau Hellas S.A.</i>	119
3.7.3	<i>Kamaridis S.A.</i>	121
3.7.4	<i>PANELCO S.A.</i>	123
3.8	IRELAND	125
3.8.1	<i>Kilkenny Cooling Systems Ltd.</i>	125
3.8.2	<i>Modular Panel Systems Ltd.</i>	127
3.8.3	<i>Polycomp Products Ltd.</i>	129
3.9	ITALY	131
3.9.1	<i>A.B. Isolanti SpA</i>	131
3.9.2	<i>Alubel Srl</i>	133
3.9.3	<i>Brianza Plastica SpA</i>	135
3.9.4	<i>DE RIGO Refrigeration Srl</i>	137
3.9.5	<i>Ediltec Srl</i>	139
3.9.6	<i>Elcom System SpA</i>	141
3.9.7	<i>Fratelli Re Srl</i>	143
3.9.8	<i>Incold Spa</i>	145
3.9.9	<i>Isocold Srl</i>	147
3.9.10	<i>Isolpack SpA</i>	149
3.9.11	<i>Isolparma Srl</i>	151
3.9.12	<i>ISO-MAR Sas</i>	153
3.9.13	<i>Isopan SpA</i>	155
3.9.14	<i>Italpannelli Srl</i>	158
3.9.15	<i>Lattonedil s.p.a.</i>	160
3.9.16	<i>Marcegaglia SpA</i>	162
3.9.17	<i>Metalleido Components srl</i>	164
3.9.18	<i>Metecno Spa</i>	166
3.9.19	<i>Misa Sud Refrigerazione SpA</i>	168
3.9.20	<i>P3 Srl</i>	170
3.9.21	<i>Pannelli Isolanti Srl</i>	172
3.9.22	<i>Pannelli Termici Srl</i>	174
3.9.23	<i>Profilcastello Srl</i>	176
3.9.24	<i>Saint Gobain PPC Italia SpA</i>	178
3.9.25	<i>Stiferite Srl</i>	180
3.9.26	<i>STIF SpA</i>	182
3.9.27	<i>Tecnocompositi Snc</i>	184
3.9.28	<i>Tegostil Srl</i>	186
3.10	NETHERLANDS	188
3.10.1	<i>EcoTherm International BV</i>	188
3.10.2	<i>GBP BV</i>	191
3.10.3	<i>Geerlofs Koeltechniek BV</i>	193
3.10.4	<i>Handelsen Constructiebedrijf H. Hardeman BV</i>	195
3.10.5	<i>Hunter Douglas Construction Elements BV</i>	197
3.10.6	<i>IsoBouw Systems BV</i>	199
3.10.7	<i>Jazo Zevenaar BV</i>	201
3.10.8	<i>J.J. Krens BV</i>	203
3.10.9	<i>KCS Clean Room Systems BV</i>	205
3.10.10	<i>Metaflex Isosystems BV</i>	207
3.10.11	<i>Opstalan BV</i>	209

3.10.12	<i>Panelen Holland BV</i>	211
3.10.13	<i>Pecocar Holland BV</i>	213
3.10.14	<i>Prins Panelen BV</i>	215
3.10.15	<i>Roma Nederland BV</i>	217
3.10.16	<i>SAB-profiel bv</i>	219
3.10.17	<i>SBC Holland BV</i>	221
3.10.18	<i>SBZ (Speciaal Bouw Zierikzee) BV</i>	223
3.10.19	<i>Smeva Products BV</i>	225
3.10.20	<i>Unidek Bouwelementen BV</i>	227
3.10.21	<i>Wolvega Panelen en Composites</i>	229
3.11	NORWAY.....	231
3.11.1	<i>Bussbygg AS</i>	231
3.11.2	<i>Fresvik Produkt AS</i>	233
3.11.3	<i>Hurre Norway AS</i>	235
3.11.4	<i>Lett Tak Systemer A/S</i>	237
3.11.5	<i>Selco Tek AS</i>	239
3.12	PORTUGAL.....	241
3.12.1	<i>Coldkit</i>	241
3.13	SPAIN.....	243
3.13.1	<i>Conformados Metalicos Galicia SA (COMEGASA)</i>	243
3.13.2	<i>DC System Iberica</i>	245
3.13.3	<i>Europafil</i>	247
3.13.4	<i>Grupo Tezno</i>	249
3.13.5	<i>Hurre Iberica SA</i>	251
3.13.6	<i>Isocold España SA</i>	253
3.13.7	<i>Isoiberica SA</i>	255
3.13.8	<i>Kide S Coop</i>	257
3.13.9	<i>Paneles Aislantes Peninsulares S.L.</i>	259
3.13.10	<i>Paneles Frigorificos SA</i>	261
3.13.11	<i>Paneles Y Cerramientos S.A.</i>	263
3.13.12	<i>Poliuretanos S.A.</i>	265
3.13.13	<i>Taver Instaclack</i>	267
3.13.14	<i>Vizute SL</i>	269
3.14	SWEDEN.....	271
3.14.1	<i>Isolamin AB</i>	271
3.14.2	<i>Plannja AB</i>	273
3.15	UNITED KINGDOM.....	275
3.15.1	<i>AIM Composites Ltd</i>	275
3.15.2	<i>Ame-Facades Ltd</i>	277
3.15.3	<i>Arm Building Ltd</i>	279
3.15.4	<i>A. Steadman & Son Ltd</i>	281
3.15.5	<i>Carter Retail Equipment Ltd</i>	283
3.15.6	<i>Cellbond Composites Ltd</i>	285
3.15.7	<i>Colsec Ltd</i>	287
3.15.8	<i>Corus Panels and Profiles</i>	289
3.15.9	<i>EcoTherm Insulation (UK) Ltd</i>	291
3.15.10	<i>EDM Spanwall Limited</i>	293
3.15.11	<i>Eurobond Laminates Ltd</i>	295
3.15.12	<i>Foster Refrigerator</i>	297
3.15.13	<i>Hemsec Manufacturing Ltd</i>	299
3.15.14	<i>Hunter Douglas</i>	301
3.15.15	<i>IAC</i>	303
3.15.16	<i>ISD Cold Stores Ltd</i>	305
3.15.17	<i>Isoclad Ltd</i>	307
3.15.18	<i>Kingspan Ltd</i>	309
3.15.19	<i>Laminated Supplies Ltd</i>	311
3.15.20	<i>Panel Systems Ltd</i>	313
3.15.21	<i>Polysec Coldrooms Ltd</i>	315
3.15.22	<i>RCS (Manufacturing) Ltd</i>	317
3.15.23	<i>Smyth Plastics Ltd</i>	319

3.15.24	<i>Stancold Plc Panel Projects Ltd</i>	321
3.15.25	<i>The Master Panel Company Ltd</i>	324
4.	SOURCES OF INFORMATION	327
4.1	ASSOCIATIONS.....	327