



**Intesco
Research
Group**

FLOUR CONFECTIONERY GOODS. RUSSIAN MARKET OF FLOUR CONFECTIONERY GOODS – 2011



MOSCOW 2011

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of the research:

MARKET OF FLOUR CONFECTIONERY GOODS

Goal of research:

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS DEVELOPMENT
FOR 2011-2014

Regions of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

ANALYSIS OF RETAIL SALE OF CONFECTIONERY GOODS IN RUSSIA
VOLUME OF THE RUSSIAN MARKET OF FLOUR CONFECTIONERY GOODS
SEGMENTATION OF RUSSIAN MARKET OF FLOUR CONFECTIONERY GOODS
TRENDS ON RUSSIAN MARKET OF CONFECTIONERY GOODS
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CONSUMER PREFERENCES ON THE MARKET OF FLOUR CONFECTIONERY GOODS

FORECAST OF THE MARKET OF FLOUR CONFECTIONERY GOODS DEVELOPMENT
FOR 2011-2014**Types of flour confectionery goods, researched:**

Waffles

Galettes and crackers

Cookies (sweet, ginger)

Muffins

Rolled cakes

Gingerbread

Ginger cakes

Cakes

Fancy cakes

Eastern sweets

Largest Russian companies with profiles:

«KDV YASHKINO» OJSC

«CHIPITA SAINT PETERSBURG» OJSC

«BRYANKONFI» OJSC

«SLADONEZH» OJSC

«CRACKER» OJSC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

Federal State Statistics Service

Economic Development Ministry

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sale reports

Materials of the field's main players

Field print and electronic publications

The research contains 95 schedules, 70 diagrams and 116 tables.

EXTRACTS FROM RESEARCH

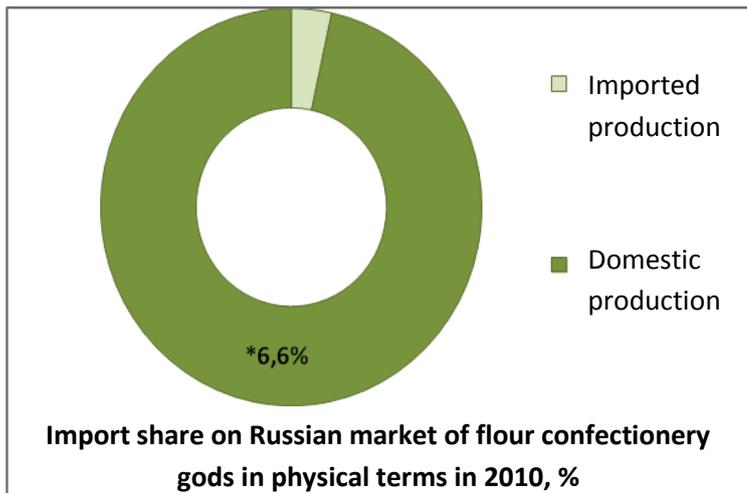
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VOLUME OF RUSSIAN MARKET OF CONFECTIONERY GOODS

In 2008 a positive dynamics of volume of Russian flour confectionery goods market was marked, the rate of growth was equal to 2,6%. In the past two years volume of flour confectionery products decreased by**8 ths tons, in 2010 – by ** ths tons. Thus the amount of flour confectionery products on Russian market in 2010 totaled to *** ths tons.



If domestic dried biscuits and gingerbread have almost 100% market coverage, then cookies and waffles share the market with foreign counterparts. However only **% of Russian market of flour confectionery goods consists of imported products.



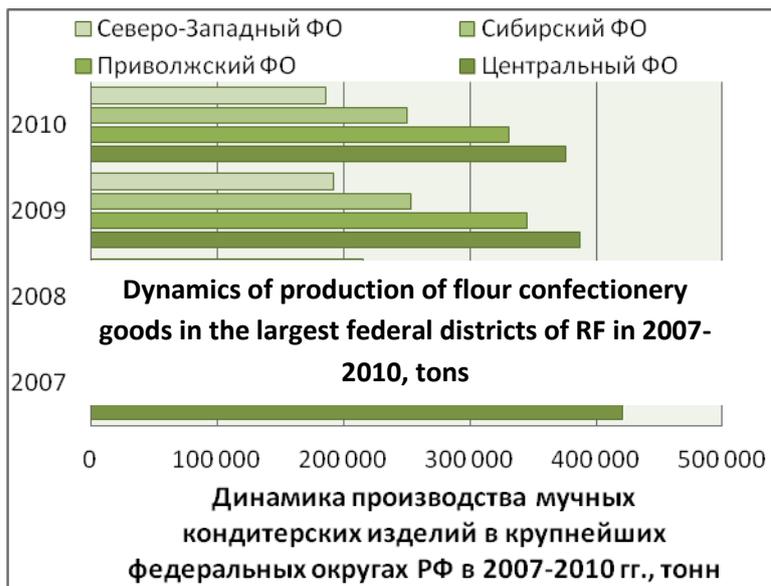
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PRODUCTION OF FLOUR CONFECTIONERY CONFECTIONERY GOODS IN RUSSIA

In January 2010 production of flour confectionery goods decreased to ** ths tons, that was the minimum parameter in 2009-2011. In the same month of 2009 in Russia ** ths tons of products were produced, in January 2011 - ** ths tons.

Despite of the low yield of grain, output volumes in September 2010 amounted to ** ths tons. This parameter was ** ths tons higher, than in the same period of 2009. It was September and October when production volumes of flour confectionery goods reached the maximum level.

In 2008, production in Volga FD increased by **%, after that in 2009 there was a trend to decline of volumes.



It should be noted that due to the reduction of production volumes of flour confectionery goods in Volga FD in 2008 the gap between the districts decreased significantly.

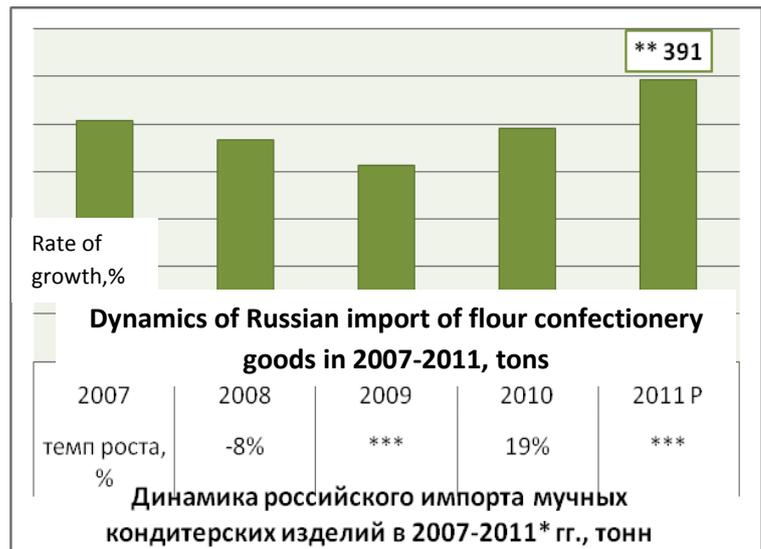
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During 2008-2009 import volume of flour confectionery goods in Russia was decreasing. In 2009, 3,3 ths tons of goods were imported on the territory of Russia. This parameter was almost by 2 ths tons less than in 2007 and by 5,4 ths tons less than in 2008.

As per the results of 2010, import of flour confectionery goods increased by 19% and amounted to 33 ths tons.

The largest part of import of flour confectionery goods belonged to 33%. They



had 33% in the structure of Russian import. The share of waffles amounted to one fifth.



Waffles

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