



**Intesco
Research
Group**

MARGARINE AND SPREADS. RUSSIAN MARKET OF MARGARINE AND SPREADS



MOSCOW 2011

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ABOUT INTESCO RESEARCH GROUP COMPANY

RESEARCH METHODOLOGY

Subject of research:

MARGARINE AND SPREADS MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2011-2013

Regions of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

RUSSIAN MARGARINE AND SPREADS MARKET VOLUME
MARGARINE AND SPREADS RETAILING IN RUSSIA
RAW-MATERIALS BASE FOR MARGARINE AND SPREADS PRODUCTION
RUSSIAN PRODUCTION OF MARGARINE AND SPREADS
THE LARGEST MARGARINE AND SPREADS PRODUCERS IN RUSSIA
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RETAIL PRICES FOR MARGARINE
FORECAST OF RUSSIAN MARGARINE AND SPREADS MARKET VOLUME FOR
2011-2013

Profiles are made for the following largest Russian enterprises:

«EFCO FOOD INGREDIENTS» LLC
«ZHIROVOY KOMBINAT» OJSC
«UVA-MOLOKO» LLC
«NIZHNY NOVGOROD OIL AND FAT FACTORY» OJSC
«GLUCOSE AND SYRUP PLANT «EFREMOVSKY» OJSC

Information about the main factories' production volume, financials of activity, balance sheet, profit and loss statements, cash flow statements, subsidiaries and some other information is also presented.

The sources of information, which are used in research:

The Federal State Statistics Service

The Agriculture Ministry

The Federal Customs Service

The Federal Tax Service

Industry experts' estimates

Retail sales reports

Data of the main players of the branch

Printed and electronic publications of the branch

The research contains 50 schedules, 29 diagrams, 59 tables and 1 scheme.

EXTRACTS FROM RESEARCH

CHAPTER 3

RUSSIAN MARGARINE AND
SPREADS MARKET VOLUME

In 2009 the Russian margarine and spreads market volume decreased by 6,4%, in 2010 – by **%. As a result, in 2010 the market volume was *** ths. tons.

According to Intesco Research Group preliminary estimates, in 2010 this trend**, dynamics will be substantially stronger – **%, and market volume will reduce to *** ths. tons.

In 2007-2010 the share of spreads on the Russian market **. In 2007 it amounted to **%, in 2010 – to **%.

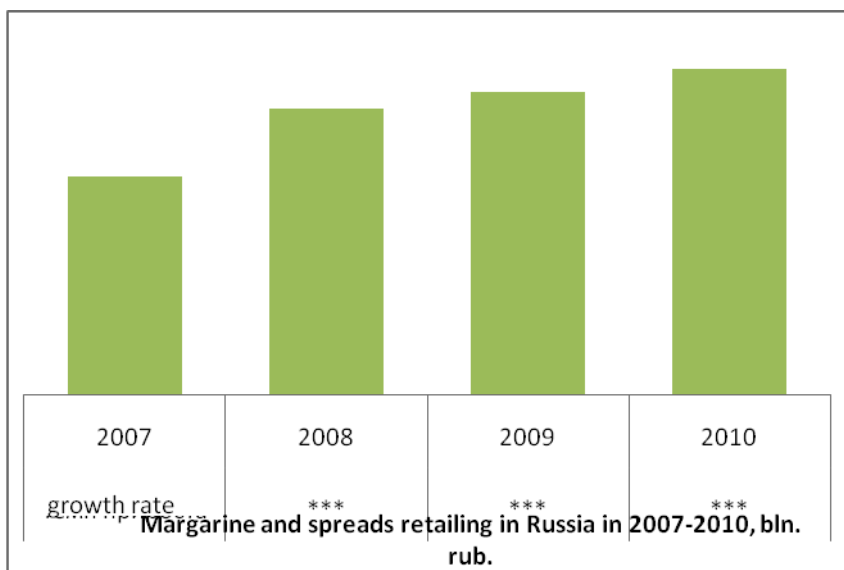


In 2011 though, according to preliminary estimates, ** share of spreads will reduce to **%.

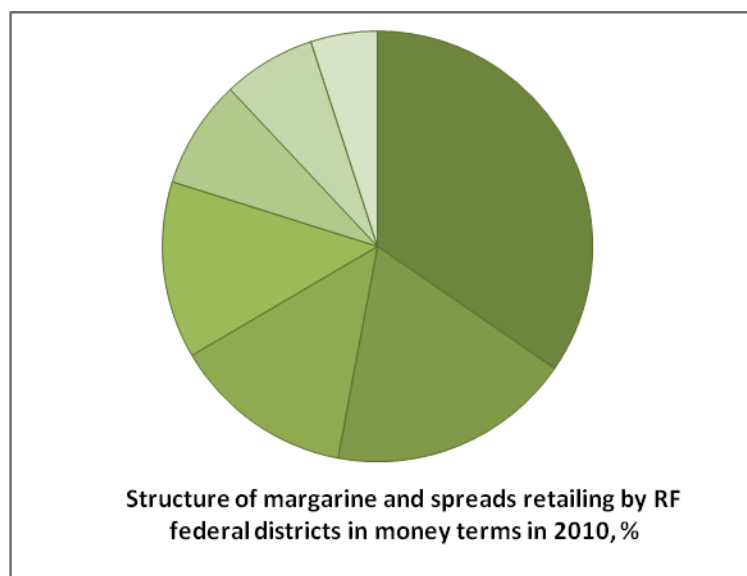
CHAPTER 4

MARGARINE AND SPREADS
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Margarine and spreads retail sales annually increase in money terms in Russia. In 2008 it increased by **%, in 2009 – by **%, in 2010 – by **%. Nevertheless, if keeping back the speed of margarine rise in price it becomes obvious, that in 2008-2009 the actual margarine and spreads consumption decreased. Thus, in 2008 the



average price for margarine rose by **%, so the real retailing dynamics this year is – (-** %). In 2009 average prices increased by **%, that is, the actual volume of retail prices also decreased by **%.



In 2010 an average retail price for margarine products and spreads increased by **%, that is, the actual growth of sales amounted to **%, and not **%, as it is without taking inflation into consideration. Retailing volume in 2010 achieved *** bln. rub.

CHAPTER 5

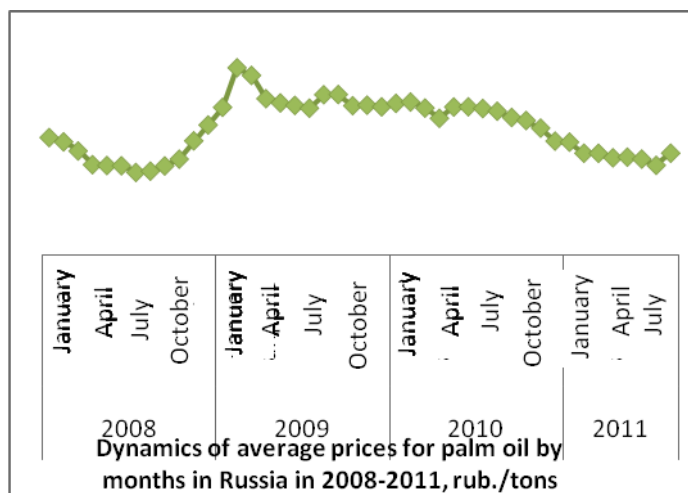
RAW-MATERIALS BASE FOR
MARGARINE AND SPREADS
PRODUCTION

According to official statistics, in 1998-2010 import of palm oil rose***fold. In 2011 according to Intesco Research Group estimates, it will rise by ***% and will reach *** ths. tons.

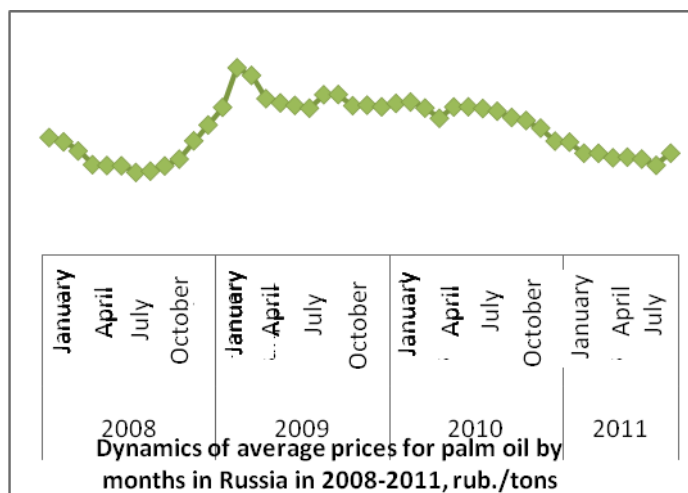
The actual volumes of these products import to Russia are evidently higher, as many factories would rather conceal the fact of using palm oil in food production (which they use more often instead of prescribed dairy butter).As a

result, most of palm oil is delivered to Russian factories from so-called «grey markets», by passing the official statistics.

In pre-crisis 2008 one ton of palm oil cost about *** ths. rub. During the crisis, when supply amounts of this product decreased, one ton of it was much more expensive – *** ths. rub./tons, that is by ***% higher. In 2010 its price reduced a little bit, but still was rather high - *** ths. rub./tons.



In 2011 the level of prices was similar to that in the pre-crisis period. In January-September one ton of palm oil cost on average *** ths. rub.



CHAPTER 9

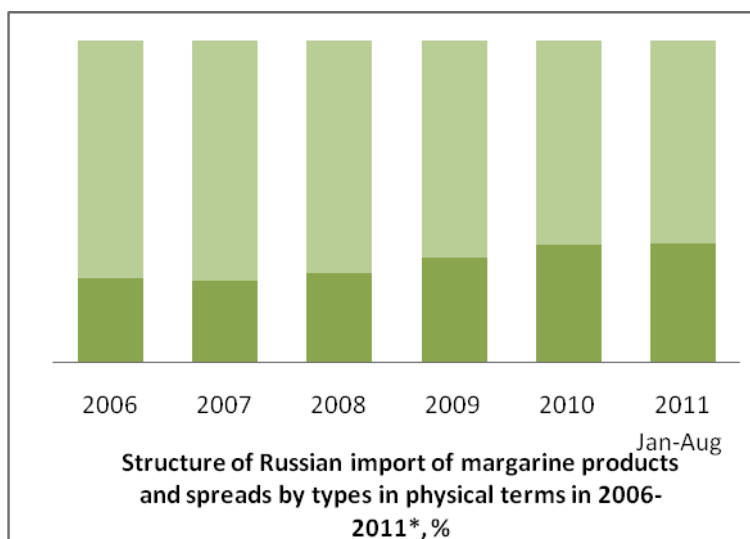
RUSSIAN IMPORT OF
MARGARINE AND SPREADS

In 2008 and 2009 the Russian import of margarine products and spreads was declining. And in 2008 its reduction amounted to **%, and in 2009 – already **%. As opposed to it, in 2010 a sudden positive trend was observed: the Russian import volume of the mentioned products rose by **times and achieved ** ths. tons.

According to Intesco Research Group estimates, in

2011 the Russian import of margarine and spreads will be slightly lower than in 2010. This is connected with the fact that in the second half of the previous year, starting September, there was a sudden import growth, typical for most countries. In fact, such an autumn/winter growth is observed every year, but still in 2010 it was much higher than in previous years. In 2011 the perspective of such a growth is low, that's why the import volume of margarine and spreads will achieve ** ths. tons, which is by **% less than in 2010.

** occupy the large share in the structure of the Russian import of these products. In 2010 they accounted for **% in physical terms.



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ABOUT INTESCO RESEARCH GROUP COMPANY

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**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**