



**Intesco
Research
Group**

SOFT DRINKS. RUSSIAN MARKET OF SOFT DRINKS



MOSCOW 2012

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	9
EXTRACTS FROM THE RESEARCH	11
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	14
RESEARCH METHODOLOGY.....	14
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	14
ABOUT INTESCO RESEARCH GROUP COMPANY	26

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Dynamics of population

The largest cities

Social standards of living

Economic activity

1.2. Economic situation

Dynamics of economic development

Stability of the state budget

1.3. Position of Russia in the world

Share of RF in the population of the world

2. SUBJECT OF THE RESEARCH

2.1. Description of soft drinks and mineral waters

2.2. Classification of soft drinks and mineral waters

Classification by All-Russian Classification of Products

Classification by All-Russian Classification of Economic Activities and Products

Classification by Commodity Nomenclature of Foreign Economic Activity

Classification of mineral waters

3. VOLUME OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

3.1. Dynamics of market volume by years

3.2. Share of import on the market

3.3. Dynamics of share of import on the market

3.4. Structure of market by types

3.5. Per capita consumption

4. VOLUME OF RUSSIAN MARKET OF SOFT DRINKS IN THE SEGMENTS

4.1. Sugar and flavour-free mineral and drinking water

Dynamics of market volume by years

Share of import on the market

Dynamics of share of import on the market

Per capita consumption

4.2. Sugary soft drinks

Dynamics of market volume by years

Share of import on the market

Dynamics of share of import on the market

Per capita consumption

Dynamics of market volume of mineral water and carbonated water containing additives of sugar by years

Dynamics of market volume of sugary drinks (fruit and vegetable, kvass, cocktail based on milk and cocoa) by years

5. SEGMENTATION OF MARKET OF MINERAL AND FRESH WATER

5.1. Price market segmentation

5.2. Market segmentation by types of packing

6. ANALYSIS OF RETAIL SALES OF SOFT DRINKS

6.1. Structure of retail sales of soft drinks

6.2. Dynamics of retail sales by years

6.3. Dynamics of retail sales by quarters

6.4. Structure of retail sales by federal districts

6.5. Largest regions of RF by retail sales

6.6. Regional structure of retail sales

7. TRENDS ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

7.1 Mineral and drinking waters

Development of production of water under private brands (PB)

Range of products expansion

Change of market structure by price segments

Change of structure of distribution channels

Change of structure of water demand by types of packing

7.2 Refreshment drinks

Increase of the number of consumers and their shares in the population of Russia

Development of refreshment drinks production under the private brands (PB)

Smoothing of seasonality of kvass consumption

7.3 Energy drinks

8. FACTORS AFFECTING THE MARKET OF SOFT DRINKS AND MINERAL WATERS

9. STATE REGULATION OF MARKET OF SOFT DRINKS AND MINERAL WATERS

10. THE LARGEST PLAYERS ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

10.1. Structure of market of soft drinks by the largest players

10.2. The largest companies on soft drinks market

Structure of market of sugary carbonated drinks

Structure of market of kvass drinks

«Pepsico Holdings» LLC

«Coca-Cola HBC Eurasia» LLC

«Ochakovo» CJSC

10.3. The largest companies on the market of mineral and drinking water

«Nestle Waters» GC

«Visma» LLC

Other companies on the market

11. CHANNELS OF DISTRIBUTION ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

11.1. Channels of distribution

11.2. Positioning of kvass drinks

12. PRODUCTION OF SOFT DRINKS AND MINERAL WATERS IN RUSSIA

12.1. Structure of production

12.2. *Dynamics of production volume by years*

12.3. Production of mineral and fresh water

Structure of production

Dynamics of volume of production by years

Dynamics of volume of production by months

Volume of production by federal districts of RF

Structure of production by federal districts of RF

Volume of production in the regions of RF

Regional structure of production

12.4. Production of sugary soft drinks

Structure of production

Dynamics of volume of production by years

Dynamics of volume of production by months

Volume of production in federal districts and regions of RF

Regional structure of Russian production

13. PRODUCTION OF SOFT DRINKS IN SEPARATE SEGMENTS

13.1. Sugar and flavour-free mineral and drinking water

Mineral table -waters

Mineral medical table-waters

Natural drinking waters

Mineralized drinking waters

13.2. Mineral and carbonated water containing additives of sugar

*Structure of production by types**Dynamics of volume of production by years**Carbonated water containing additives of sugar**Mineral water containing additives of sugar*

13.3. Sugary drinks

*Structure of production of sugary drinks**Fruit drinks**Vegetable drinks**Kvass drinks**Cocktails based on milk and cocoa***14. THE LARGEST RUSSIAN PRODUCERS OF SOFT DRINKS AND MINERAL WATERS**

14.1. Soft drinks (except for mineral waters)

14.2. Mineralized waters

*Volume of production of the largest Russian companies**Structure of production by the largest Russian companies***15. ANALYSIS OF RUSSIAN IMPORT OF SOFT DRINKS AND MINERAL WATERS**

15.1 Analysis of Russian import of mineral and drinking water

*Dynamics of volume of import by years**Dynamics of volume of import by months**Volume of import by supplying countries**Structure of import by supplying countries*

15.2. Analysis of Russian import of mineral, carbonated waters and drinks containing additives of sugar (except for juices)

*Dynamics of volume of import by years**Dynamics of volume of import by months**Volume of import by supplying countries**Structure of import by supplying countries***16. ANALYSIS OF RUSSIAN EXPORT OF SOFT DRINKS AND MINERAL WATERS**

16.1. Analysis of Russian export of mineral and drinking water

*Volume of export by years (including Kazakhstan)**Dynamics of volume of export by years**Dynamics of volume of export by months**Volume of export by countries of destination*

Structure of export by countries of destination

16.2. Analysis of Russian export of mineral, carbonated waters containig additives of sugar and drinks (except for juices)

Dynamics of volume of export by years

Dynamics of volume of export by months

Volume of export by countries of destination

Structure of export by countries of destination

17. PRICES OF PRODUCERS FOR SOFT DRINKS AND MINERAL WATER IN RUSSIA

17.1. Sugar and flavour -free mineral and carbonated waters

Dynamics of prices of producers by years

Dynamics of prices of producers by months

17.2. Other soft drinks

Dynamics of prices of producers by years

Dynamics of prices of producers by months

18. RETAIL PRICES FOR SOFT DRINKS AND MINERAL WATER IN RUSSIA

18.1. Mineral water

Dynamics of retail prices by years

Dynamics of retail prices by months

18.2. Carbinated water (except for mineral water)

Dynamics of retail prices by years

Dynamics of retail prices by months

19. PROFILES OF THE LARGEST PRODUCERS BY THE PRODUCTION OF SOFT DRINKS AND MINERAL WATERS

19.1. Profiles of the largest companies by the production of soft drinks (except for mineral waters)

«PEPSICO HOLDINGS» LLC

«COCA COLA HBC EURASIA» LLC

MBNP «OCHAKOVO» CJSC

«DEKA» JSC

«DENEБ» JSC

19.2. Profiles of the largest companies by the production of mineral and drinking water

«KARACHINKSKIY ISTOCHNIK» LLC

COMPANY «MERKURIY» LLC

«NESTLE WATERCOOLERS SERVICE» LLC

PA UNDOROVSKIY MINERAL WATER PLANT «VOLZHANKA»

«KOMPANIYA CHISTAYA VODA» LLC

20. CONSUMERS' PREFERENCES ON THE MARKET OF SOFT DRINKS AND MINERAL WATERS

20.1. Soft drinks

20.3. Kvass

20.2. Mineral water

Preferences by types of mineral water

Buying reasons of mineral and drinking water

Places of buying of mineral and drinking water

21. FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS FOR 2011-2014

21.1. Forecast of development of Russian market of mineral and drinking water

21.2. Forecast of development of Russian market of mineral, carbonated water containing additives of sugar and drinks (except for juices)

ABOUT INTESCO RESEARCH GROUP COMPANY

RESEARCH METHODOLOGYE

Subject of research:

SOFT DRINKS MARKET

Goal of research:

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

Regions of research:

RUSSIA AND THE REGIONS OF RF

Main blocks of research:

VOLUME OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS
VOLUME OF RUSSIAN MARKET OF SOFT DRINKS IN SEPARATE SEGMENTS
SEGMENTATION OF MARKET OF MINERAL AND FRESH WATER
ANALYSIS OF RETAIL SALES OF SOFT DRINKS
TRENDS ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS
FACTORS AFFECTING THE MARKET OF SOFT DRINKS AND MINERAL WATERS
STATE REGULATION OF MARKET OF SOFT DRINKS AND MINERAL WATERS
THE LARGEST PLAYERS ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS
CHANNELS OF DISTRIBUTION ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS
PRODUCTION OF SOFT DRINKS AND MINERAL WATERS IN RUSSIA
PRODUCTION OF SOFT DRINKS IN SEPARATE SEGMENTS
THE LARGEST RUSSIAN PRODUCERS OF SOFT DRINKS AND MINERAL WATERS
ANALYSIS OF RUSSIAN IMPORT OF SOFT DRINKS AND MINERAL WATERS
ANALYSIS OF RUSSIAN EXPORT OF SOFT DRINKS AND MINERAL WATERS
PRICES OF PRODUCERS FOR SOFT DRINKS AND MINERAL WATER IN RUSSIA
RETAIL PRICES FOR SOFT DRINKS AND MINERAL WATER IN RUSSIA
CONSUMERS' PREFERENCES ON THE MARKET OF SOFT DRINKS AND MINERAL WATERS

FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS FOR 2011-2014

The largest Russian companies surveyed:

«PEPSICO HOLDINGS» LLC

«COCA COLA HBC EURASIA» LLC

MBNP «OCHAKOVO» CJSC

«DEKA» JSC

«DENEБ» JSC

«KARACHINKSKIY ISTOCHNIK» LLC

COMPANY «MERKURIY» LLC

«NESTLE WATERCOOLERS SERVICE» LLC

PA UNDOROVSKIY MINERAL WATER PLANT «VOLZHANKA»

«KOMPANIYA CHISTAYA VODA» LLC

Volume of production, financial rates of activity, balance sheets, profit and loss reports, cash flow statements, subsidiary enterprises and other information are presented by the main companies.

Information sources used in research:

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Custom Service

Federal Tax Service

Evaluations of Experts of the Branch

Reports on retail sales

Data of the main players of the branch

Printed and electronic publications of the branch

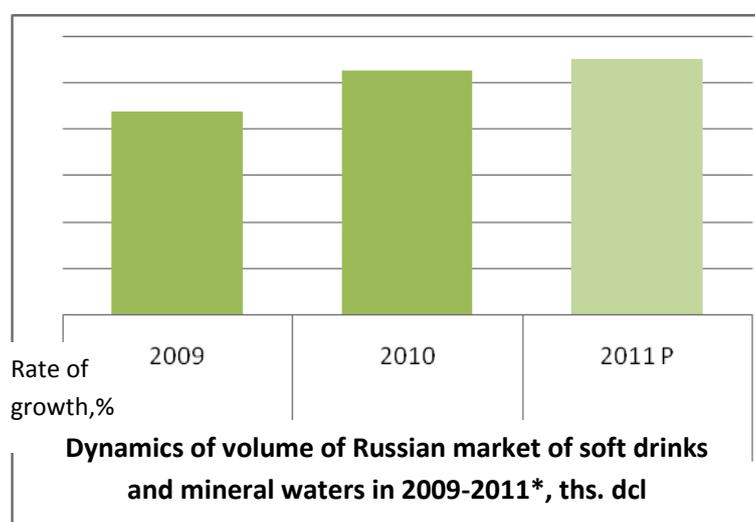
The research contains 89 schedules, 63 diagrams, 121 tables.

EXTRACTS FROM THE RESEARCH

CHAPTER 3

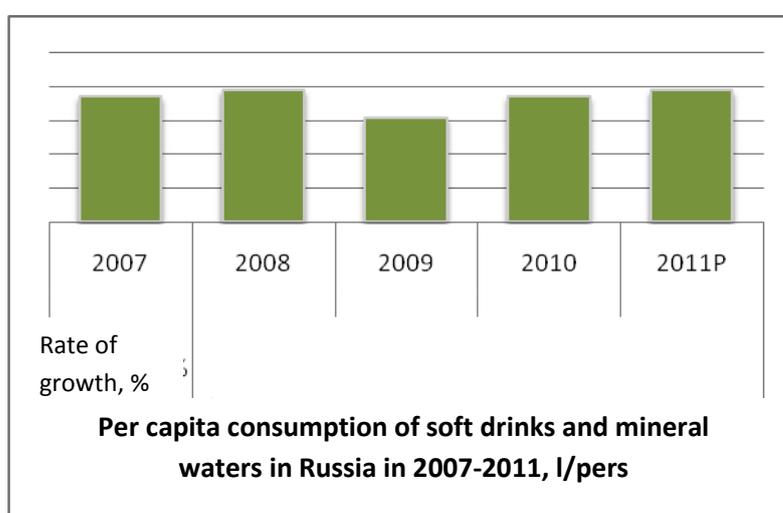
VOLUME OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

Russian market of soft drinks and mineral waters can be divided into two segments: sugary (drinks, cocktails, carbonated water and so on) and sugarless (mineral and drinking water) soft drinks.



For 2010 the share of segment of sugar and flavour-free mineral and drinking water, having been decreased by 2 p. p., amounted to ***% in the structure of Russian market of soft drinks and mineral waters. In 2011 trend has been

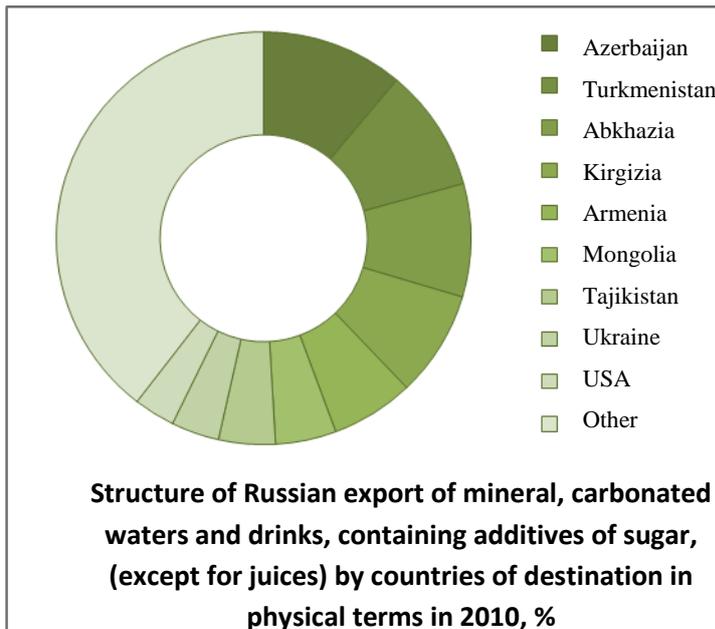
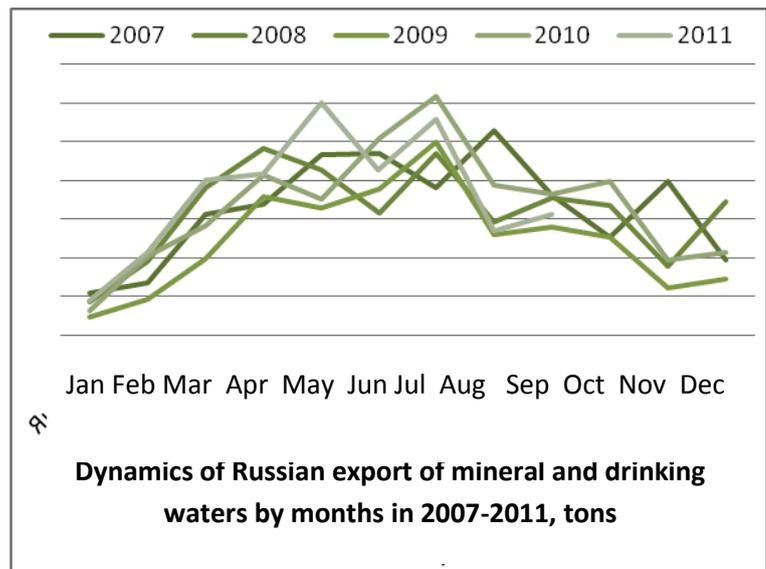
replaced by the opposite, and according to Intesco Research Group, the share of mineral water in the structure would be ***% at the year-end.



CHAPTER 16

ANALYSIS OF RUSSIAN EXPORT

Last year the share of Kazakhstan in the structure of export by countries in physical terms amounted to **%, and in cost terms – **%. Along with substantial volume of export, cost of water, supplied to the neighboring country, was too low.

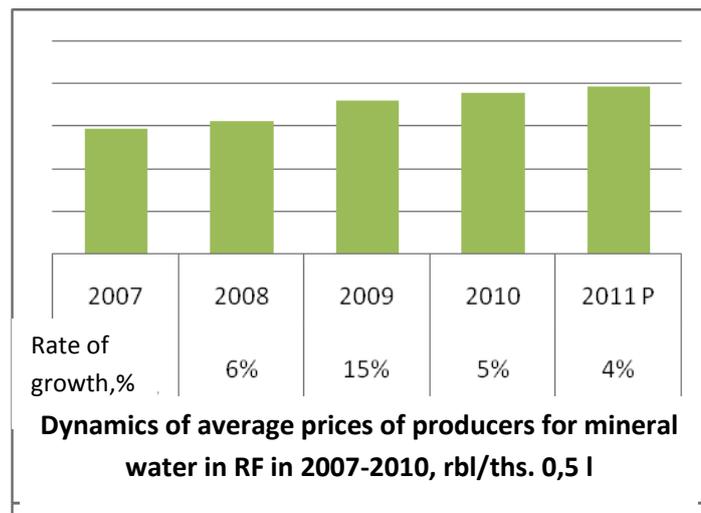


In 2009 supplies of mineral and drinking water from Russia to foreign market decreased from **% to ** ths. tons. In 2010 ** ths. tons of water were exported from Russia, which exceeded the rate of the previous year by **. According to the analysts of Intesco Research Group, in 2011 volume of Russian export of mineral and drinking water without additives will amount to **ths. tons

CHAPTER 17

PRICES OF PRODUCERS

In 2010 producers sold soft drinks (except for mineral waters) for *** rbs/dcl. In comparison with 2009 price of products increased by *** rbs/dcl or ***%. In 2011 annual average price for sugary and carbonated soft drinks will be at the level of ***rbs/dcl.



Prices of Russian producers for mineral water in 2010 in comparison with the last year on average increased by ***% and amounted to ***ths. rbs/th. *** l.

In 2011 growth was continued, however rate of growth decreased to ***%.

Hereinafter there are data about price of producers for mineral water by months in 2007-2011. In general, the January price for a liter of mineral water by producers increased by ***% for this period.

	2007	2008	2009	2010	2011
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

2. SUBJECT OF RESEARCH

3. VOLUME OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

Schedule 12. Dynamics of volume of Russian market of soft drinks and mineral waters in 2009-2011*, ths. dcl

Diagram 1. The share of import on Russian market of mineral and drinking water in physical terms in 2010, %

Diagram 2. Dynamics of import share on Russian market of soft drinks and mineral waters in physical terms in 2009-2010, %

Diagram 3. Structure of Russian market of soft drinks and mineral waters by types in physical terms in 2010, %

Schedule 13. Per capita consumption of soft drinks and mineral waters in Russia in 2007-2011*, liter per person

4. VOLUME OF RUSSIAN MARKET OF SOFT DRINKS IN SEPARATE SEGMENTS

Schedule 14. Dynamics of volume of Russian market of mineral and drinking water in 2007-2010, ths. dcl

Diagram 4. Share of import on Russian market of mineral and drinking water in physical terms in 2010, %

Diagram 5. Dynamics of import share on Russian market of mineral and drinking water in physical terms in 2007-2010, %

Schedule 15. Per capita consumption of mineral and drinking water in Russia in 2007-2010, liter per person

Schedule 16. Dynamics of volume of Russian market of sugary soft drinks in 2009-2010, ths. dcl

Diagram 6. Share of import on Russian market of sugary soft drinks in physical terms in 2010, %

Diagram 7. Dynamics of import share on Russian market of sugary soft drinks in physical terms in 2009-2010, %

Schedule 17. Per capita consumption of sugary drinks in Russia in 2009-2010, liter per person

Schedule 18. Dynamics of volume of Russian market of mineral and carbonated water containing additives of sugar in 2009-2011*, ths. dcl

Schedule 19. Dynamics of volume of Russian market of sugary drinks (fruit and vegetable, kvass, cocktails based on milk and cocoa) in 2009-2011*, ths. dcl

5. SEGMENTATION OF MARKET OF MINERAL AND DRINKING WATER

Diagram 8. Price segmentation of market of mineral and drinking water in cost terms in 2010, %

Diagram 9. Segmentation of market of mineral and drinking water by types of packing in cost terms in 2010, %

6. ANALYSIS OF RETAIL SALES OF SOFT DRINKS

Diagram 10. Share of mineral and drinking water in the structure of retail sales of soft drinks in cost terms in 2010, %

Schedule 20. Dynamics of retail sales of soft drinks in Russia in 2009-2010, bln rbs

Schedule 21. Dynamics of retail sales of soft drinks by quarters in 2009-2011, bln rbs

Schedule 2. Volume of retail sales of soft drinks in federal districts of RF in 2009-2010, ths. rbs

Diagram 11. Structure of retail sales of soft drinks by federal districts of RF in cost terms in 2010, %

Schedule 22. The largest regions of RF by volume of retail sales of soft drinks in 2010, bln rbs

Table 3. Volume of retail sales of soft drinks in the regions of RF in 2009-2010, ths. rbs

Diagram 12. Regional structure of retail sales of soft drinks in 2010 in cost terms, %

Diagram 13. Change of regional structure of retail sales of soft drinks in RF in cost terms in 2009-2010, %

7. TRENDS ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

Table 4. The number of consumers of soft drinks and their share in the population of Russia in 2006-2010 and forecast for 2011-2015

Diagram 14. Structure of market of soft drinks by the largest producers in physical terms in 2011, %

Table 5. The number of consumers of mineral and drinking water in 2006-2010 and forecast for 2011-2015

Schedule 23. Dynamics of annual consumption of bottled water in 2007-2011*, liter per person

Table 6. The number of consumers of soft drinks and their share in the population of Russia in 2006-2010 and forecast for 2011-2015

Schedule 24. Dynamics of annual consumption of carbonated drinks in 2007-2011*, liter per person

Table 7. The number of consumers of energy drinks and their share in the population of Russia in 2006-2010 and forecast for 2011-2015

8. FACTORS AFFECTING THE MARKET OF SOFT DRINKS AND MINERAL WATERS

9. STATE REGULATION OF MARKET OF SOFT DRINKS AND MINERAL WATERS

10. THE LARGEST PLAYERS ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

Diagram 15. Structure of market of soft drinks by the largest players in 2011, %

Diagram 16. Segmentation of market of sugary carbonated drinks (lemonades) by the largest producers in cost terms in 2010, %

Diagram 17. Segmentation of market of kvass drinks by the largest producers in physical terms in 2010, %

Diagram 18. Structure of retail sales of the largest producers of mineral and drinking water in physical terms in 2010, %

11. CHANNELS OF DISTRIBUTION ON RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS

Diagram 19. Structure of sales of mineral and drinking water by channels of distribution in 2010, %

12. PRODUCTION OF SOFT DRINKS AND MINERAL WATERS IN RUSSIA

Diagram 20. Structure of Russian production of soft drinks and mineral waters by types in physical terms in 2010, %

Schedule 25. Dynamics of volume of Russian production of soft drinks and mineral waters in 2009-2011*, ths. dcl

Diagram 21. Structure of Russian production of mineral and drinking water by categories in physical terms in 2010, %

Diagram 22. Structure of Russian production of mineral and drinking water by types in physical terms in 2010, %

Schedule 26. Dynamics of volume of Russian production of mineral and drinking water in 2007-2011*, ths. dcl

Schedule 27. Dynamics of volume of Russian production of mineral and drinking water by months in 2007-2011, ths. dcl

Table 8. Volume of production of mineral water in federal districts of RF in 2007-2010, ths. dcl

Schedule 28. Dynamics of production of mineral and drinking water in the largest federal districts of RF in 2007-2010, ths. dcl

Diagram 23. Structure of Russian production of mineral and drinking water by federal districts in 2010, %

Diagram 24. Change of structure of Russian production of mineral and drinking water by federal districts in 2007-2010, %

Table 9. Volume of production of mineral and drinking water in the regions of RF in 2007-2010, ths. dcl

Schedule 29. Dynamics of production of mineral and drinking water in main regions of RF in 2007-2010, ths. dcl

Diagram 25. Regional structure of Russian production of mineral and drinking water in 2010, %

Diagram 26. Change of regional structure of Russian production of mineral and drinking water in 2007-2010, %

Diagram 27. Structure of Russian production of sugary soft drinks by types in physical terms in 2010, %

Schedule 30. Dynamics of volume of Russian production of soft drinks in 2009-2011*, ths. dcl

Schedule 31. Dynamics of volume of Russian production of sugary soft drinks by months in 2010-2011, ths. dcl

Table 10. Volume of Russian production of sugary soft drinks in 2010, ths. dcl

Diagram 28. Regional structure of Russian production of sugary soft drinks in 2010, %

13. PRODUCTION OF SOFT DRINKS IN SEPARATE SEGMENTS

Table 11. Volume of Russian production of mineral table water in 2010, ths. dcl

Diagram 29. Regional structure of Russian production of mineral table-water in 2010, %

Table 12. Volume of Russian production of mineral medical table-water in 2010, ths. dcl

Diagram 30. Regional structure of Russian production of mineral medical table-waters in 2010, %

Table 13. Volume of Russian production of natural drinking waters in 2010, ths. dcl

Diagram 31. Regional structure of Russian production of natural drinking waters in 2010, %

Table 14. Volume of Russian production of mineralized waters in 2010, ths. dcl

Diagram 32. Regional structure of Russian production of mineralized waters in 2010, %

Schedule 32. Dynamics of volume of Russian production of mineral and carbonated water containing additives of sugar in 2009-2011*, ths. dcl

Schedule 33. Dynamics of volume of Russian production of carbonated water containing additives of sugar in 2009-2010, ths. dcl

Schedule 34. Dynamics of volume of Russian production of carbonated water containing additives of sugar by months in 2010-2011, ths. dcl

Schedule 15. Volume of production of carbonated water containing additives of sugar in federal districts in 2009-2010, tons

Schedule 35. Dynamics of volume of production of carbonated water containing additives of sugar in the largest federal districts of RF in 2009-2010, ths. dcl

Diagram 35. Structure of Russian production of carbonated water containing additives of sugar by federal districts in 2010, %

Diagram 36. Change of structure of Russian production of carbonated water containing additives of sugar by federal districts in 2009-2010, %

Table 16. Volume of production of carbonated water containing additives of sugar in the regions of RF in 2009-2010, ths. dcl

Schedule 36. Dynamics of production of carbonated water containing additives of sugar in the largest regions of RF in 2009-2010, ths. dcl

Diagram 37. Regional structure of Russian production of carbonated water containing additives of sugar in 2010, %

Diagram 38. Change of regional structure of Russian production of carbonated water containing additives of sugar in 2009-2010, %

Schedule 37. Dynamics of volume of Russian production of mineral water containing additives of sugar in 2009-2010, ths dcl

Table 17. Volume of production of mineral water containing additives of sugar in the regions of RF in 2010, ths. half a liter

Diagram 39. Structure of Russian production of sugary drinks by types in physical terms in 2010, %

Diagram 40. Change of structure of Russian production of sugary drinks by types in physical terms in 2009-2010, %

Schedule 38. Dynamics of volume of Russian production of sugary drinks in 2009-2010, ths. dcl

Schedule 39. Dynamics of volume of Russian production of fruit drinks in 2009-2010, ths. std. cans

Schedule 40. Dynamics of volume of Russian production of fruit drinks by months in 2010-2011, ths. std. cans

Table 18. Volume of production of fruit drinks in federal districts of RF in 2009-2010, ths. std. cans

Schedule 41. Dynamics of production of fruit drinks in the largest federal districts of RF in 2009-2010, ths. std. cans

Diagram 41. Structure of Russian production of fruit drinks by federal districts in 2010, %

Diagram 42. Change of structure of Russian production of fruit drinks by federal districts in 2009-2010, %

Table 19. Volume of production of fruit drinks in the regions of RF in 2009-2010, ths. std. cans

Schedule 42. Dynamics of production of fruit drinks in the largest regions of RF in 2009-2010, ths. std. cans

Diagram 43. Regional structure of Russian production of fruit drinks in 2010, %

Diagram 44. Change of regional structure of Russian production of fruit drinks in 2009-2010, %

Schedule 43. Dynamics of volume of Russian production of vegetable drinks in 2007-2010, ths. std. cans

Schedule 44. Dynamics of volume of Russian production of vegetable drinks by months in 2010-2011, ths. std. cans

Table 20. Volume of production of vegetable drinks in the regions of RF in 2007-2010, ths. std. cans

Diagram 45. Regional structure of Russian production of vegetable drinks in 2010, %

Schedule 45. Dynamics of volume of Russian production of kvass drinks in 2009-2010, ths. dcl

Schedule 46. Dynamics of volume of Russian production of kvass drinks by months in 2010-2011, ths. dcl

Table 21. Volume of production of kvass drinks in the federal districts of RF in 2009-2010, ths. dcl

Schedule 47. Dynamics of production of kvass drinks in the largest federal districts of RF in 2009-2010, ths. dcl

Diagram 46. Structure of Russian production of kvass drinks by federal districts in 2010, %

Diagram 47. Change of structure of Russian production of kvass drinks by federal districts in 2009-2010, %

Table 22. Volume of production of kvass drinks in the regions of RF in 2009-2010, ths. dcl

Schedule 48. Dynamics of production of kvass drinks in the largest regions of RF in 2009-2010, ths. dcl

Diagram 48. Regional structure of Russian production of kvass drinks in 2010, %

Diagram 49. Change of regional structure of Russian production of kvass drinks in 2009-2010, %

Schedule 49. Dynamics of volume of Russian production of cocktails based on milk and cocoa in 2009-2010, tons

Schedule 50. Dynamics of volume of Russian production of cocktails based on milk and cocoa by months in 2010-2011, tons

Table 23. Volume of production of cocktails based on milk and cocoa in federal districts of RF in 2009-2010, tons

Diagram 50. Structure of Russian production of cocktails based on milk and cocoa by federal districts in 2010, %

Table 24. Volume of production of cocktails based on milk and cocoa in the regions of RF in 2009-2010, tons

Diagram 51. Regional structure of Russian production of cocktails based on milk and cocoa in 2010, %

14. THE LARGEST RUSSIAN PRODUCERS OF SOFT DRINKS AND MINERAL WATERS

Table 25. The largest companies, whose main activity by All-Russian Classification of Types of Economic Activities is «production of soft drinks except for mineral waters» as of the 1st of October 2011

Schedule 51. The largest companies by total volume of income with the main activity by All-Russian Classification of Types of Economic Activities «production of soft drinks except for mineral waters» in RF in 2010, ths. rbs

Diagram 52. Regional structure of distribution of producers of soft drinks (except for mineral waters) in B 2011, %

Table 26. Volume of production of mineral water by the largest Russian producers in 2007-2009, ths. dcl

Diagram 53. Shares of the largest companies in the structure of all-Russian production of mineral water in 2009, %

15. ANALYSIS OF RUSSIAN IMPORT OF SOFT DRINKS AND MINERAL WATERS

Schedule 52. Dynamics of Russian import of mineral and drinking waters in 2007-2011*, tons

Schedule 53. Dynamics of Russian import of mineral and drinking waters in 2007-2011*, ths dlrs

Schedule 54. Dynamics of Russian import of mineral and drinking waters by months in 2007-2011, tons

Schedule 55. Dynamics of Russian import of mineral and drinking waters by months in 2007-2011, ths. dlrs

Table 27. Volume of Russian import of mineral and drinking waters by supplying countries in 2007-2011, tons

Schedule 56. Volume of Russian import of mineral and drinking waters by the largest countries of origin in 2010, tons

Table 28. Volume of Russian import of mineral and drinking waters without additives of sugar by supplying countries in 2007-2010, ths. dlrs

Schedule 57. Volume of Russian import of mineral and drinking waters by the largest countries of origin in 2010, ths. dlrs

Diagram 54. Structure of Russian import of mineral and drinking waters by the countries of origin in physical terms in 2010, %

Diagram 55. Structure of Russian import of mineral and drinking waters by the countries of origin in cost terms in 2010, %

Schedule 58. Dynamics of Russian import of mineral, carbonated waters and drinks, containing additives of sugar, (except for juices) in 2007-2011*, tons

Schedule 59. Dynamics of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) in 2007-2011*, ths. dlrs

Schedule 60. Dynamics of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by months in 2007-2011, tons

Schedule 61. Dynamics of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by months in 2007-2011, ths. dlrs

Table 29. Volume of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by supplying countries in 2007-2011, tons

Schedule 62. Volume of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by the largest countries of origin in 2010, tons

Table 30. Volume of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by supplying countries in 2007-2011, ths. dcl

Schedule 63. Volume of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by the largest countries of origin in 2010, ths. dcl

Diagram 56. Structure of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by countries of origin in physical terms in 2010, %

Diagram 57. Structure of Russian import of mineral, carbonated waters and drinks, containing additives of sugar (except for juices) by countries of origin in cost terms in 2010, %

16. ANALYSIS OF RUSSIAN EXPORT OF SOFT DRINKS AND MINERAL WATERS

Table 31. Volume of export of mineral and drinking water by years including Kazakhstan in 2007-2010, tons

Table 32. Volume of export of mineral and drinking water by years including Kazakhstan in 2007-2010, ths. dlrs

Schedule 64. Dynamics of Russian export of mineral and drinking waters in 2007-2011*, tons

Schedule 65. Dynamics of Russian export of mineral and drinking waters in 2007-2011*, ths. dlrs

Schedule 66. Dynamics of Russian export of mineral and drinking waters by months in 2007-2011, tons

Schedule 67. Dynamics of Russian export of mineral and drinking waters by months in 2007-2011, ths. dlrs

Table 33. Dynamics of Russian export of mineral and drinking waters by countries of destination in 2007-2011, tons

Schedule 68. Volume of Russian export of mineral and drinking waters by the largest countries of destination in 2010, tons

Table 34. Volume of Russian export of mineral and drinking waters by countries of destination in 2007-2011, ths. dlrs

Schedule 69. Volume of Russian export of mineral and drinking waters by the largest countries of destination in 2010, ths. dlrs

Diagram 58. Structure of Russian export of mineral and drinking waters by countries of destination in physical terms in 2010, %

Diagram 59. Structure of Russian export of mineral and drinking waters by countries of destination in cost terms in 2010, %

Schedule 70. Dynamics of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) in 2007-2011*, tons

Schedule 71. Dynamics of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) in 2007-2011*, ths. dlrs

Schedule 72. Dynamics of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) in 2007-2011, tons

Schedule 73. Dynamics of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) by months in 2007-2011, ths. dlrs

Table 35. Volume of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) by countries of destination in 2007-2011, tons

Schedule 74. Volume of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) by the largest countries of destination in 2010, tons

Schedule 75. Volume of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) by the largest countries of destination in 2010, ths. dlrs

Diagram 60. Structure of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) by countries of destination in physical terms in 2010, %

Diagram 61. Structure of Russian export of mineral, carbonated waters and drinks containing additives of sugar (except for juices) by countries of destination in cost terms in 2010, %

17. PRICES OF PRODUCERS FOR SOFT DRINKS AND MINERAL WATER IN RUSSIA

Schedule 76. Dynamics of average prices of producers for mineral water in RF in 2007-2011*, rbl/ths. 0,5 l

Schedule 77. Dynamics of average prices of producers for mineral water in RF by months in 2007-2011*, rbl/ths. 0,5 l

Schedule 37. Average prices of producers for mineral water in RF by months in 2007-2011, rbl/ths. 0,5 l

Schedule 78. Dynamics of average prices of producers for soft drinks (except for mineral waters) in RF in 2007-2011*, rbl/dcl

Schedule 79. Dynamics of average prices of producers for soft drinks (except for mineral waters) in RF by months in 2007-2011, rbl/dcl

Table 38. Average prices of producers for soft drinks (except for mineral waters) in RF by months in 2007-2011, rbl/dcl

18. RETAIL PRICES FOR SOFT DRINKS AND MINERAL WATER IN RUSSIA

Schedule 80. Dynamics of average retail prices for mineral water in RF in 2007-2011*, rbl/dcl

Schedule 81. Dynamics of average retail prices for mineral water in RF by months in 2007-2011, rbl/dcl

Schedule 39. Average retail prices for mineral water in RF by months in 2007-2011, rbl/dcl

Schedule 82. Dynamics of average retail prices for carbonated water (except for mineral) in RF in 2007-2011*, rbl/dcl

Schedule 83. Dynamics of average retail prices for carbonated water (except for mineral) in RF by months in 2007-2011, rbl/dcl

Table 40. Average retail prices for carbonated water (except for mineral) in RF by months in 2007-2011, rbl/dcl

19. PROFILES OF THE LARGEST COMPANIES BY PRODUCTION OF SOFT DRINKS AND MINERAL WATERS

Table 41. Shareholders /founders «PEPSICO HOLDINGS» LLC

Table 42. Subsidiary enterprises «PEPSICO HOLDINGS» LLC

Table 43. Balance sheet «PEPSICO HOLDINGS» LLC *ths. rbs*

Table 44. Profit and loss report «PEPSICO HOLDINGS» LLC *ths. rbs*

Table 45. Cash flow statement «PEPSICO HOLDINGS» LLC *ths. rbs*

Table 46. Dynamics of activity «PEPSICO HOLDINGS» LLC

Table 47. Shareholders /founders «COCA COLA HBC EURASIA» LLC

Table 48. Subsidiary enterprises «COCA COLA HBC EURASIA» LLC

Table 49. Balance sheet «COCA COLA HBC EURASIA» LLC *ths. rbs*

Table 50. Profit and loss report «COCA COLA HBC EURASIA» LLC *ths. rbs*

Table 51. Cash flow statement «COCA COLA HBC EURASIA» LLC *ths. rbs*

Table 52. Dynamics of activity «COCA COLA HBC EURASIA» LLC

Table 53. Shareholders /founders Moscow beer and nonalcoholic plant «OCHAKOVO» CJSC

Table 54. Subsidiary enterprises Moscow beer and nonalcoholic plant «OCHAKOVO» CJSC

Table 55. Balance sheet Moscow beer and nonalcoholic plant «OCHAKOVO» CJSC *ths. rbs*

Table 56. Profit and loss report Moscow beer and nonalcoholic plant «OCHAKOVO» CJSC *ths. rbs*

Table 57. Cash flow statement Moscow beer and nonalcoholic plant «OCHAKOVO» CJSC *ths. rbs*

Table 58. Dynamics of activity Moscow beer and nonalcoholic plant «OCHAKOVO» CJSC

Table 59. Shareholders /founders «DEKA» JSC

Table 60. Subsidiary enterprises «DEKA» JSC

Table 61. Balance sheet «DEKA» JSC *ths. rbs*

Table 62. Profit and loss report «DEKA» JSC *ths. rbs*

Table 63. Cash flow statement «DEKA» JSC *ths. rbs*

Table 64. Dynamics of activity «DEKA» JSC

Table 65. Shareholders /founders «DENEБ» JSC

Table 66. Subsidiary enterprises «DENEБ» JSC

- Table 67. Balance sheet «DENEБ» JSC ths. rbs
- Table 68. Profit and loss report «DENEБ» JSC ths. rbs
- Table 69. Cash flow statement «DENEБ» JSC ths. rbs
- Table 70. Dynamics of activity «DENEБ» JSC
- Table 71. The number of staff «KARACHINKSKIY ISTOCHNIK» LLC, ppl
- Table 72. Shareholders /founders «KARACHINKSKIY ISTOCHNIK» LLC
- Table 73. Subsidiary enterprises «KARACHINKSKIY ISTOCHNIK» LLC
- Table 74. Volume of production «KARACHINKSKIY ISTOCHNIK» LLC
- Table 75. Balance sheet «KARACHINKSKIY ISTOCHNIK» LLC ths. rbs
- Table 76. Profit and loss report «KARACHINKSKIY ISTOCHNIK» LLC ths. rbs
- Table 77. Cash flow statement «KARACHINKSKIY ISTOCHNIK» LLC ths. rbs
- Table 78. Dynamics of activity «KARACHINKSKIY ISTOCHNIK» LLC
- Table 79. The number of staff COMPANY «MERKURIY» LLC, ppl.
- Table 90. Shareholders /founders COMPANY «MERKURIY» LLC
- Table 91. Subsidiary enterprises COMPANY «MERKURIY» LLC»
- Table 92. Volume of production COMPANY «MERKURIY» LLC
- Table 93. Balance sheet COMPANY «MERKURIY» LLC ths. rbs
- Table 94. Profit and loss report COMPANY «MERKURIY» LLC ths. rbs
- Table 95. Cash flow statement COMPANY «MERKURIY» LLC ths. rbs
- Table 96. Dynamics of activity COMPANY «MERKURIY» LLC
- Table 97. The number of staff «NESTLE WATERCOOLERS SERVICE» LLC, ppl.
- Table 98. Subsidiary enterprises «NESTLE WATERCOOLERS SERVICE» LLC
- Table 100. Volume of production «NESTLE WATERCOOLERS SERVICE» LLC
- Table 101. Balance sheet «NESTLE WATERCOOLERS SERVICE» LLC ths. rbs
- Table 102. Profit and loss report «NESTLE WATERCOOLERS SERVICE» LLC ths. rbs
- Table 103. Cash flow statement «NESTLE WATERCOOLERS SERVICE» LLC ths. rbs
- Table 104. Dynamics of activity «NESTLE WATERCOOLERS SERVICE» LLC ths. rbs
- Table 105. The number of staff PA UMWP «VOLZHANKA», ppl.
- Table 106. Shareholders /founders PA UMWP «VOLZHANKA»
- Table 107. Subsidiary enterprises PA UMWP «VOLZHANKA»
- Table 108. Volume of production PA UMWP «VOLZHANKA»
- Table 109. Balance sheet PA UMWP «VOLZHANKA» ths. rbs
- Table 110. Profit and loss report PA UMWP «VOLZHANKA» ths. rbs
- Table 111. Cash flow statement PA UMWP «VOLZHANKA» ths. rbs
- Table 112. The number of staff «KOMPANIYA CHISTAYA VODA» LLC, ppl

Table 113. Shareholders /founders «KOMPANIYA CHISTAYA VODA» LLC

Table 114. Subsidiary enterprises «KOMPANIYA CHISTAYA VODA» LLC

Table 115. Volume of production «KOMPANIYA CHISTAYA VODA» LLC

Table 116. Balance sheet «KOMPANIYA CHISTAYA VODA» LLC, ths. rbs

Table 117. Profit and loss report «KOMPANIYA CHISTAYA VODA» LLC, ths. rbs.

Table 118. Cash flow statement «KOMPANIYA CHISTAYA VODA» LLC, ths. rbs

Table 119. Dynamics of activity «KOMPANIYA CHISTAYA VODA» LLC

20. CONSUMERS' PREFERENCE ON THE MARKET OF SOFT DRINKS AND MINERAL WATERS

Table 120. Rating of brands of sugary carbonated drinks by share of respondents who like them, %

Diagram 62. Change of structure of consumption of soft drinks in Russia in 2007, 2008, 2010, %

Diagram 63. Change of structure of buying soft drinks in Russia in 2007, 2008, 2010, %

Schedule 84. Share of families buying kvass at least 1 time a month in Moscow and in the largest regions of Russia, %

Schedule 85. Brands of kvass, which were consumed mostly in Russia in 2010, % of the number of respondents

Table 121. Rating of brands of mineral and drinking waters by share of respondents who like them, %

21. FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF SOFT DRINKS AND MINERAL WATERS FOR 2011-2014

Schedule 86. Dynamics of volume of Russian market of mineral and drinking water in 2007-2010 and forecast for 2011-2014, ths. dcl

Schedule 87. Dynamics of share of import on the market of mineral and drinking water in physical terms in 2007-2014*, %

Schedule 88. Dynamics of volume of Russian market of sugary soft drinks and forecast for 2011-2014, ths. dcl

Schedule 89. Dynamics of share of import on the market of sugary soft drinks in physical terms in 2009-2014*, %

ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP COMPANY

INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

OUR CLIENTS



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