



**Intesco  
Research  
Group**

# RUSSIAN MEAT MARKET



**MOSCOW 2011**

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## **INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY**

## METHODS OF RESEARCH

**Subject of the research:**

RUSSIAN MEAT MARKET.

**Goal of research:**

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

**Region of research:**

RUSSIA AND REGIONS OF RF

**Main blocks of research:**

LIVESTOCK IN RUSSIA

VOLUME OF THE RUSSIAN MEAT MARKET

ANALYSIS OF RETAIL SALE OF MEAT

MEAT PRODUCTION (CARCASS WEIGHT BASIS) IN RUSSIA

MEAT PRODUCTION (SLAUGHTER WEIGHT) IN RUSSIA

LARGEST MEAT PRODUCERS OF RUSSIA

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STRUCTURE OF MEAT RETAIL PRICE

RUSSIAN MEAT MARKET TRENDS

STATE REGULATION OF MEAT MARKET

CONSUMER PREFERENCES ON THE RUSSIAN MEAT MARKET

RUSSIAN MEAT MARKET DEVELOPMENT FORECAST FOR 2011-2013.

**Largest Russian companies with profiles:**

NOVIY OSKOL BRANCH OF "PRIOSKOLYE" JSC

"PETELINSKY PZ" LLC

"SVINOKOMPLEKS KOROCHA" JSC

"MYASOKOMBINAT BOBROVSKY" LLC

"MYASOKOMBINAT KLINSKY" JSC

“MPK “PENZENSKY” JSC

“MOS-ET” LLC

"PUSHKINSKY MYASNOY DVOR" LLC

For the main companies the production volumes, financials of activity, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other information is 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 presents 124 schedules, 96 diagrams and 112 tables.**

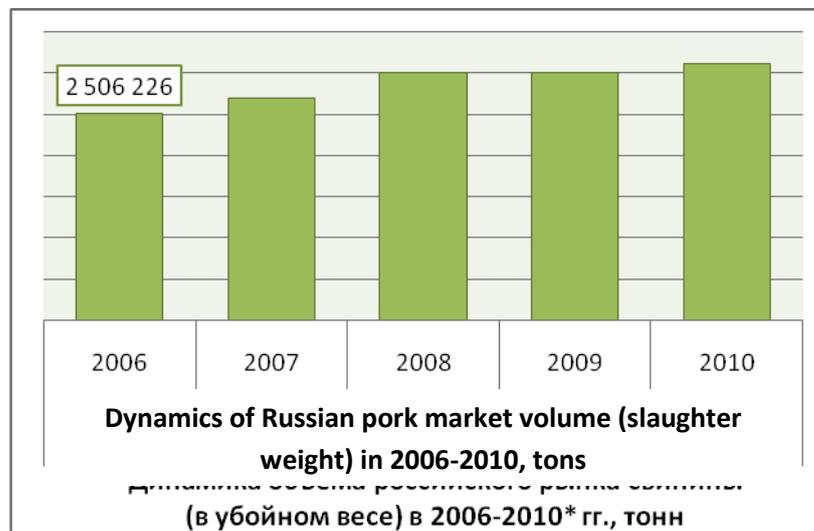
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## VOLUME OF RUSSIAN MEAT MARKET

The Russian market of poultry has been dynamically developing during the last 3 years. Major trend for today is \*\*\*.

Domestic poultry farming is developing rapidly: poultry population and poultry production increase. Rejection of the product in the year 2010 in comparison with 2009, when it held \*\*\*% of the total Russian poultry import, did not have a bad influence on the product offer on the Russian domestic market: domestic production in 2010 satisfies more than \*\*\*% of the Russian



demand. Besides Russia has taken serious steps to the \*\*\* development.



Import content on the Russian mutton market in slaughter weight made up \*\*\*%. Home-made mutton holds \*\*\*% of the Russian market.

In 2010, each beef consuming Russian used in average \*\*\*% of this meat. Since 2006, the consumption rose by \*\*\* kg.

**ПЛАН А 5**

**MEAT RETAIL SALES ANALYSES**

Poultry meat retail sales dynamics in 2009 and 2010 is characterized by the same tendency taken quarterly. The highest income from retail sales of poultry meat each year falls on \*\*\* quarter. Decay is peculiar for the \*\*\* quarter, in the second quarter the retail turnover \*\*\*, by the \*\*\* quarter it decreases again (by 4% in 2010) and sharply increases in the \*\*\* (by 25% in 2010).

In 2010 \*\*\* of income from total poultry sales fall on Volga Federal District (\*\*\* %). \*\*\*% of retail turnover of total sales in monetary equivalent accounts for Central Federal District. \*\*\* Federal District share in the Russian 17%.



Volga Federal District poultry meat in money terms makes up

Central Federal District



The highest proceeds from sales of poultry meat in Russia accounts for \*\*\* district (21 bln. rub.). Second place is after the Republic of Bashkortostan (\*\*\* bln. rub.).

## CHAPTER 9

ANALYSIS OF RUSSIAN MEAT  
IMPORT

The majority of pork, coming from abroad, is frozen. The major categories in import structure by types in 2010 were other frozen pork (\*\*\*, other frozen by-products (\*\*\* and frozen pork gammons, shoulders and cuts of them (8,1 . Frozen liver and frozen carcasses and half-carcasses account for \*\*\*% and 4,3% accordingly.

In 2009 monthly volumes of Russian pork import tended to grow, in January they reached the maximum rate for 2009-2010 – \*\*\* tons. At the beginning of 2010 the foreign supplies were decreased to \*\*\* tons. In the first six months \*\*\* was observed, that was changed by unsteady dynamics in the second half of 2010.



Volumes of Russian mutton import by supplying in 2006-2010, tons  
Объемы российского импорта баранины по странам-поставщикам в 2006-2010 гг., тонн

	2006	2007	2008	2009	2010
All countries of the world	***	***	***	***	***
<b>Australia</b>	11 279	***	***	***	***
<b>New Zealand</b>	***	2 427	***	***	***
<b>Moldova</b>	***	***	243	***	***
<b>Uruguay</b>	262	***	***	***	***
<b>Iceland</b>	***	***	7	***	***
<b>Bulgaria</b>	***	***	***	***	***

Three main countries that import mutton and goat meat into Russia have the following shares in Russian structure: \*\*\*–\*\*\*%, New Zealand –\*\*\*% ...

## CHAPTER 16

## ANALYSIS OF RUSSIAN MEAT EXPORT

In 2009 there was a big increase of pork export by\*\*\*%. As per data of 2010 Russia exported to foreign market \*\*\* tons of products. In comparison to previous year \*\*\* of volume by almost \*\*\* is observed.

Half of Russian production cattle meat offered on the foreign market is presented by \*\*\* beef. About \*\*\*% of the total domestic export makes cattle frozen liver. 3% in the structure of the total supply of Russian beef to other countries makes \*\*\* beef. Other by-products account for almost \*\*\* Russian beef export.

Structure of the Russian poultry meat export by destination countries in money terms in 2010, %

Структура российского экспорта мяса птицы по странам назначения в стоимостном выражении в 2010 году, %



In value terms mutton export volumes in 2010 were equal to \*\*\* ths. USD, that is almost \*\*\* times \*\*\*, than was exported in 2009.

Destination countries of Russian export are \*\*\*, Azerbaijan, until 2009 – Denmark.

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