

**Intesco  
Research  
Group**

# MINERAL AND DRINKING WATER



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## RESEARCH METHODOLOGY

**Subject of research:**

MARKET OF MINERAL AND DRINKING WATER

**Goal of research:**

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR  
2015-2016

**Regions of research:**

WORLD, RUSSIA, RF REGIONS

**Main blocks of research:**

WORLD MARKET OF MINERAL AND DRINKING WATER  
ANALYSIS OF MINERAL AND DRINKING WATER SALES  
VOLUME OF THE RUSSIAN MARKET OF MINERAL AND DRINKING WATER  
SEGMENTATION OF RUSSIAN MARKET OF MINERAL AND DRINKING  
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CONSUMER PREFERENCES ON MINERAL AND DRINKING WATER MARKET  
FORECAST OF THE MARKET DEVELOPMENT FOR 2015-2016

**Largest Russian companies with profiles:**

«KARACHINSKY ISTOCHNIK» LLC

«KAVMINVODY» JSC

«MERKURIY» LLC

«NARZAN» JSC

«VISMA» JSC

For the main companies the production volumes, financials of activity, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other data are presented.

**Information sources used:**

Federal State Statistics Service

Ministry of economic development of RF

RF tax service

Federal Customs Service

Expert evaluations

Materials of field establishments

Field print and electronic, business and specialized publications

Material of producing companies and market players

**The research presents 60 schedules, 77 diagrams, 85 tables and 1 picture.**

## EXTRACTS FROM RESEARCH

## CHAPTER 4

## RETAIL SALES ANALYSIS

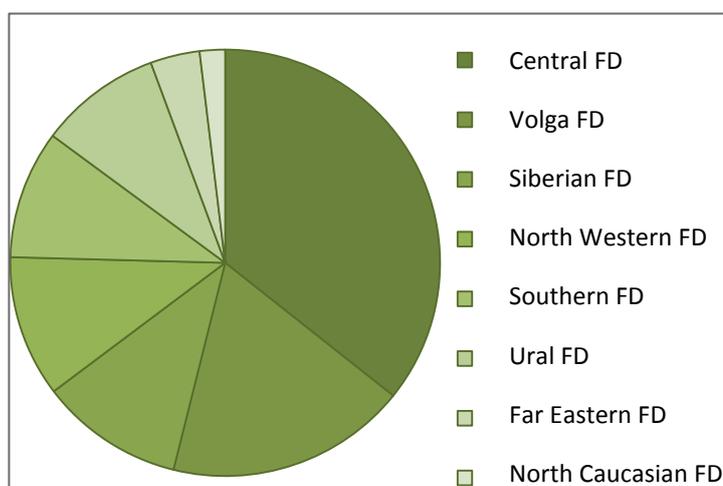
The leader by alcohol-free beverages consumption during the surveyed period was Central FD. In 2013 its retail sales enterprises sold the products for the sum of 91,4 billion rubles, that was \*,4 billion more than in 2012. Two times less alcohol-free beverages were sold in \*\*\* FD. Here sales increased by \*,7 billion rubles during a year.

Retail sales structure of alcohol-free beverages in 2010-2013 was uniform, but some changes in it happened nevertheless. In 2011 the share of Central Federal District increased considerably (by \*

%), thus the share of Southern Federal District decreased (by 18%) though in 2010 the share of Southern federal district was equal to the share of Central federal district and made \*%. Shares of other districts increased by \*-\* % in 2011 compared to 2010.

In 2012 the trend to growth of the Central federal district share proceeded (+\* %). In general essential changes compared to 2011 did not happen.

In 2013 the share of Central FD was equal to \*\*% of gross proceeds from alcohol-free beverages sales. Volga FD provided 18% of retailing. Shares of North Western, Southern and Siberian Fds amounted to 11%, \*\*% and 10% respectively.



Change of structure of retail sales of alcohol-free beverages by federal districts of RF in cost terms in 2010-2013, %

## CHAPTER 20

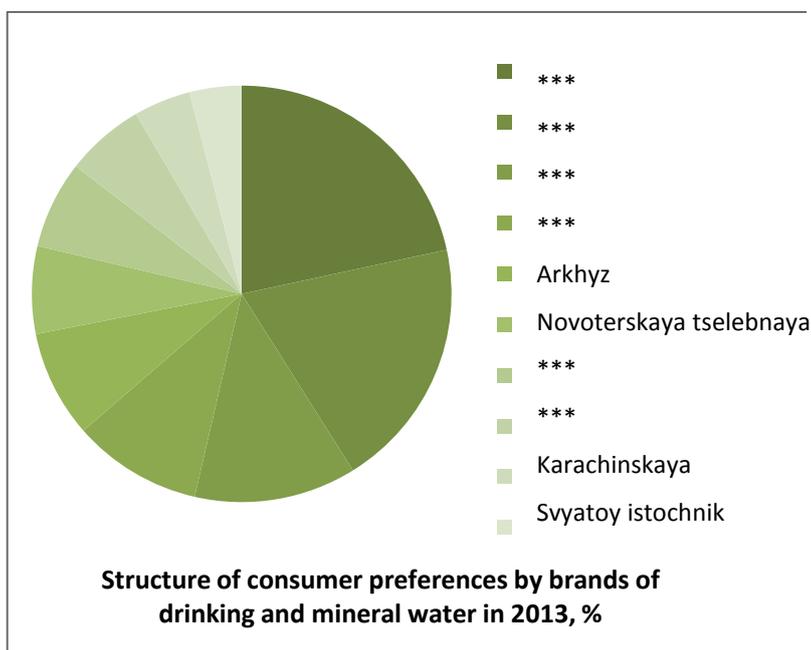
CONSUMER PREFERENCES ON  
THE MARKET

The most preferred brands of drinking and mineral water among Russians were Aqua \*\*\*, \*\*\*, «\*\*\*» and «\*\*\*». If in 2011 \*\* water ranked first among other brands (it was chosen by 22% of the respondents), then in 2012 this brand was preferred by \*\*,6% only.

\*\*\* water in 2012 ranked first, as it was preferred by 26% of the respondents although in 2011 value of the parameter was equal to 21%.

10-11% in 2011 belonged to «Arkhyz» and «\*\*\*» water, in 2012 the share of «Essentuki» water in drinking water consumer preferences structure increased to 10,8%, the share of «Arkhyz» water, on the contrary, decreased to \*,9%.

As for consumer preferences in 2013, their structure changed. Four leading brands included «\*\*\*» drinking water, the share of which increased to 10%, although in 2011 it did not exceed \*\*,5%. So Aqua Minerale brand water ranked first which was preferred by \*1,6% of the respondents. In its turn BonAqua water share decreased from \*\*\*\*% to \*\*\*5%.

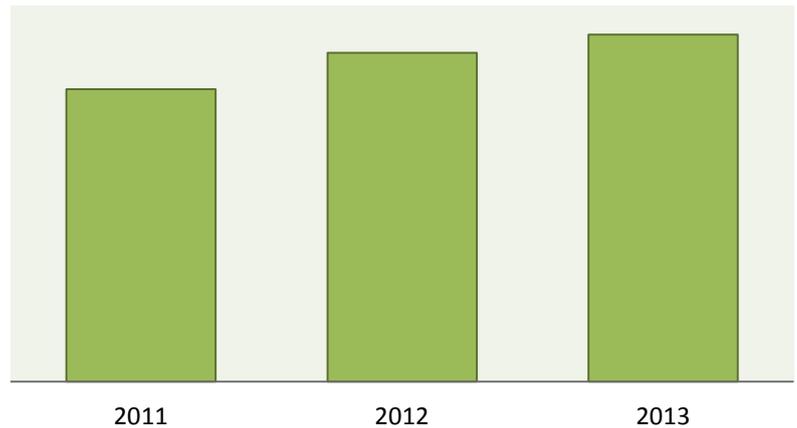


**CHAPTER 11**

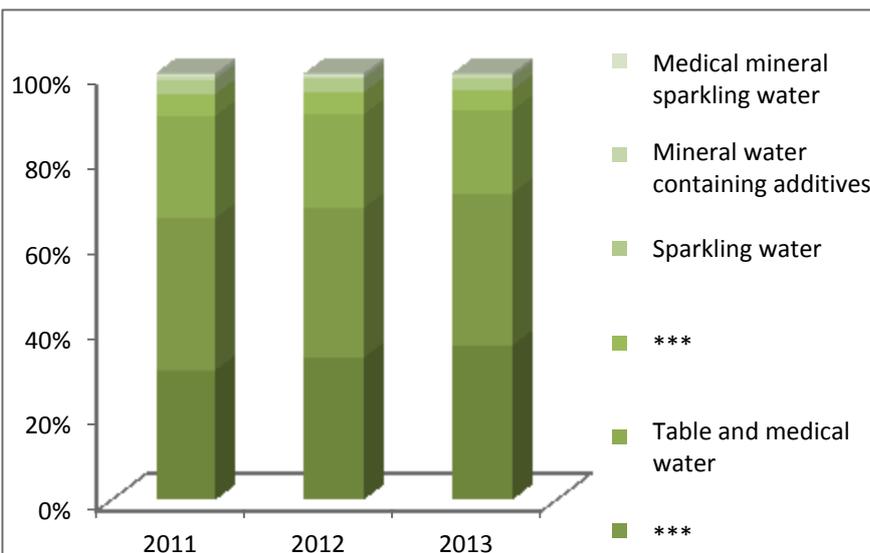
**MINERAL AND DRINKING WATER PRODUCTION**

Dynamics of mineral and drinking water production in Russia in 2011-2013 was characterized by a positive trend: during the surveyed three years production volume increased by over 10% and by the end of 2013 amounted to over 15 billion half-litres.

Structure of mineral and drinking water production in Russia is



**Dynamics of Russia mineral and drinking water production in 2011-2013, thousand half-litres**



**Dynamics of mineral and drinking water production in 2011-2013, %**

diverse enough today. However the greatest volume of goods production in 2011-2013 was provided by production of three types of water total share of which exceeded 60%.

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## **ABOUT INTESCO RESEARCH GROUP**

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