

**Intesco
Research
Group**

WORLD MARKET OF TURKEY MEAT. RUSSIAN MARKET OF TURKEY MEAT – 2012



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ABOUT INTESCO RESEARCH GROUP

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Subject of research:

RUSSIAN AND WORLD MARKET OF TURKEY MEAT

Goal of research:

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS DEVELOPMENT FOR 2012-2014

Regions of research:

RUSSIA

REGIONS OF RF

WORLD

Basic units of research:

WORLD MARKET OF TURKEY

RUSSIAN MARKET OF TURKEY

TRENDS ON RUSSIAN MARKET OF TURKEY

FACTORS AFFECTING MARKET OF TURKEY

GOVERNMENT REGULATION OF TURKEY MEAT MARKET

PRODUCTION OF TURKEY MEAT IN RUSSIA

RUSSIAN LARGEST PRODUCERS OF TURKEY MEAT

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ANALYSIS OF RUSSIAN IMPORT OF TURKEY MEAT

PRICES FOR TURKEY MEAT IN RUSSIA

CONSUMERS' PREFERENCES ON THE MARKET OF MEAT

PROFILES OF THE LARGEST PRODUCERS

FORECAST OF MARKET DEVELOPMENT FOR 2012-2015

Russian largest enterprises profiled:

“EVRODON” LLC

«KRASNOBOR» CJSC

“SIBIRSKAYA GUBERNIA”

“BASHKIRIA POULTRY BREEDING COMPLEX NAMED AFTER M. GAFURI”

LLC

«EGORIEVSK POULTRY PLANT», LLC

The largest enterprises are presented by production volume, financials, sheet balances, profit and loss statements, cash-flow statements, subsidiaries and other information.

Information sources used:

Federal State Statistics Service
Ministry of Economic Development of RF
Federal Custom Service
+Federal Tax Service
Evaluation of Experts of the Branch
Retail sales statements
Data of the main players of the branch
Printed and electronic publications of the branch

The research contains 41 Schedules, 22 Diagrams, 23 Tables.

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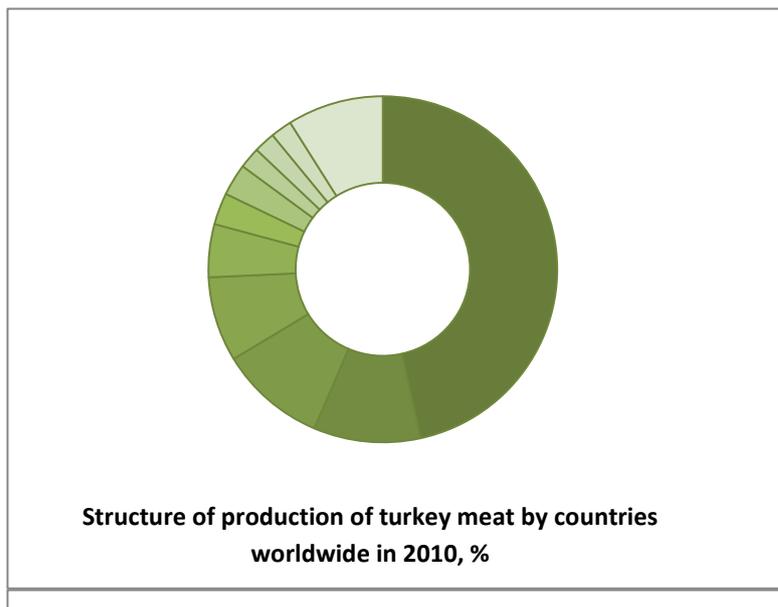
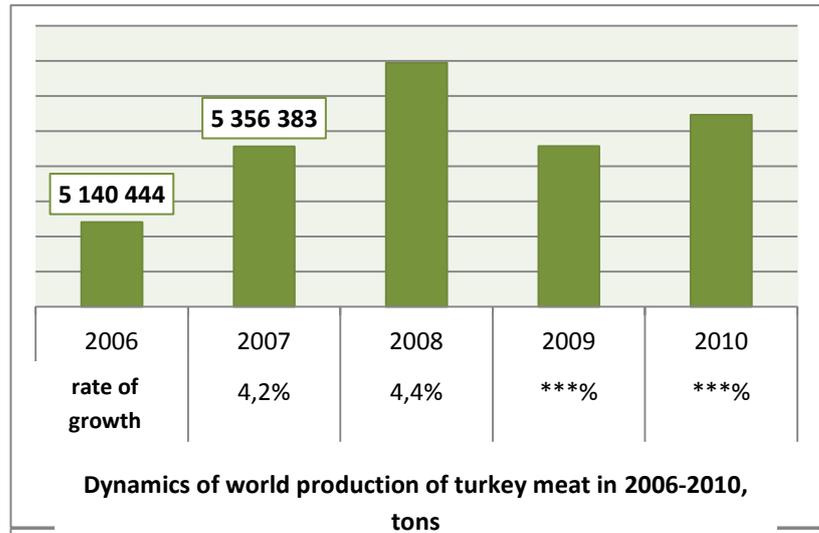
WORLD MARKET OF TURKEY

Within the period of 2006 – 2010 production of turkey meat reached its maximum in 2008 when it was equal to *** mln. tons. In 2009 this rate reduced by ***% or *** ths. tons, but in 2010 it increased by ***% to *** mln. tons.

By production of turkey meat the absolute leader is ***, where in 2010 *** mln. tons were produced. It was followed with almost fivefold gap by ***, where *** ths. tons were produced. The third position was occupied by *** with the production of *** ths. tons.

In 2010 production of turkey meat was highly concentrated: ten countries produced ***% of the total

output. ***% of the world turkey meat production was concentrated in ***. The shares of *** and *** were equal to ***% each. The shares of other countries amounted to ***% and less.

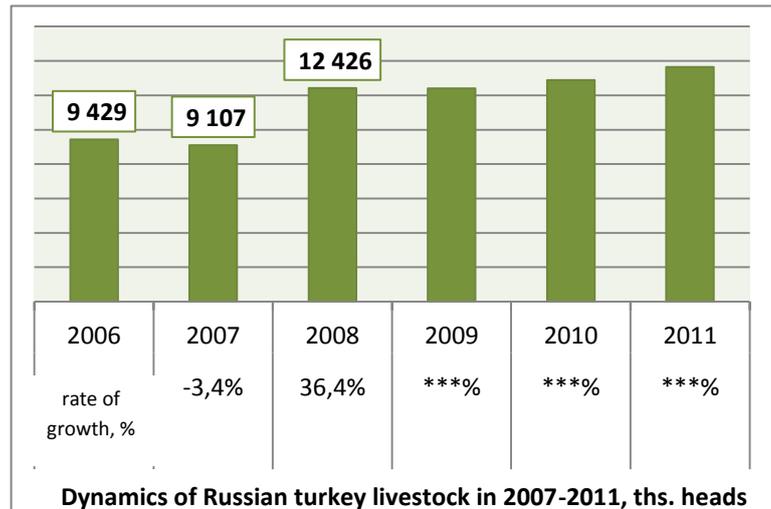


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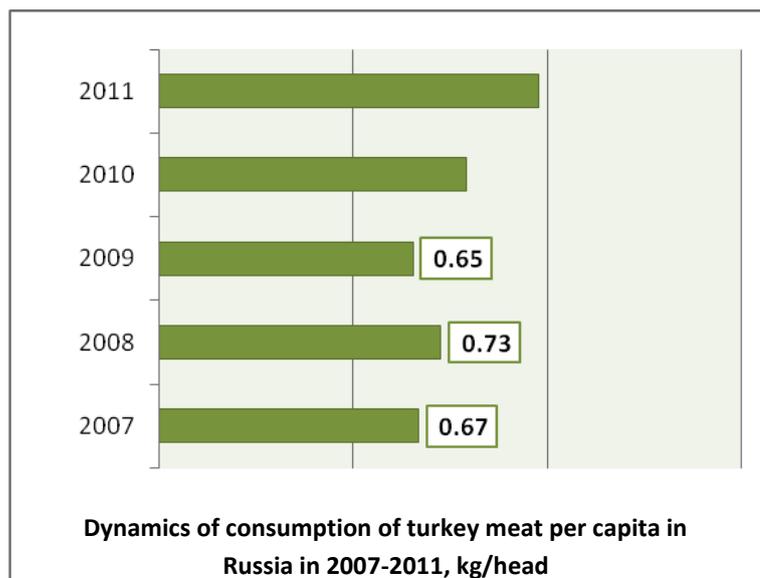
RUSSIAN MARKET OF TURKEY

According to the estimation of Intesco Research Group in 2011 turkey stock grew by ***% and reached *** mln. heads. Heretofore a significant growth of livestock was noticed in 2008 – by 36% or 3,3 mln. heads.

In the structure of poultry livestock the share of turkeys still remains modest: In 2011 it was equal to about ***%.



In 2011 consumption of turkey amounted to *** kg per capita. Compared with the previous year growth of consumption was due to ***. Population of the Far East, ***, *** was least provided with turkey meat.



In 2011 *** ths. tons of turkey were available on Russian market. With a potential level of consumption of *** kg per capita potential capacity of Russian market was equal to *** ths. tons, while deficit - *** ths. tons.

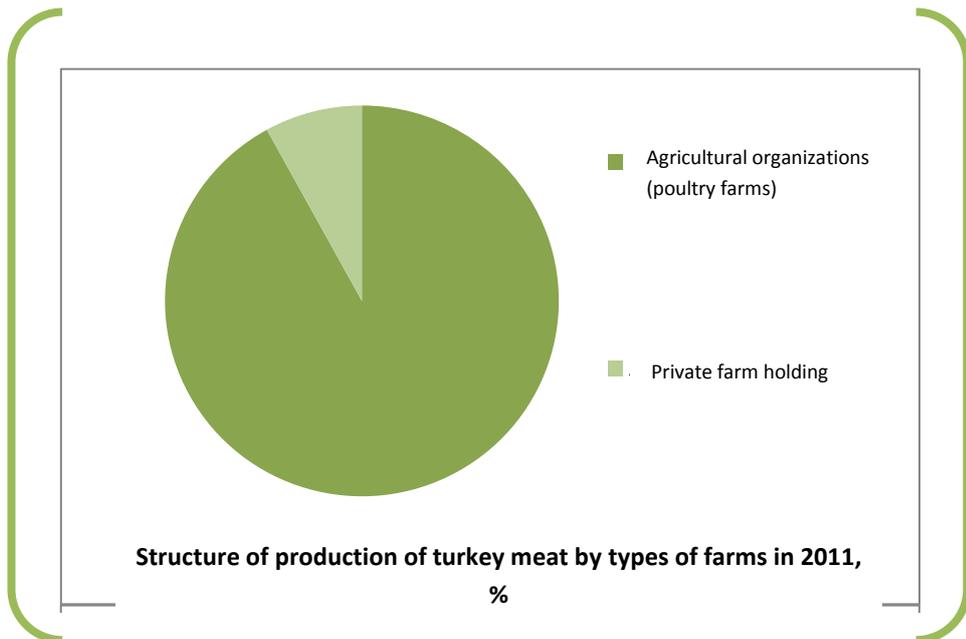
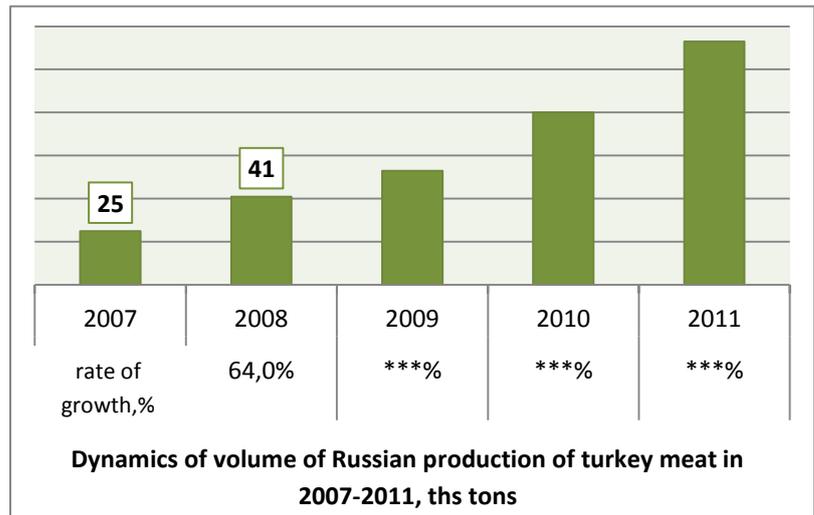
CHAPTER 8

**PRODUCTION OF TURKEY MEAT
IN RUSSIA**

In 2011 production of turkey in Russia continued growing and reached the level of *** ths. tons. Since 2007 the production volume increased more than four times.

Usually, according to the world practice, turkeys are bred on family farms with a small number of head, while production

process is divided between different companies. In Russia large agricultural enterprises provide the major part of production, dealing with incubation, farming and killing.

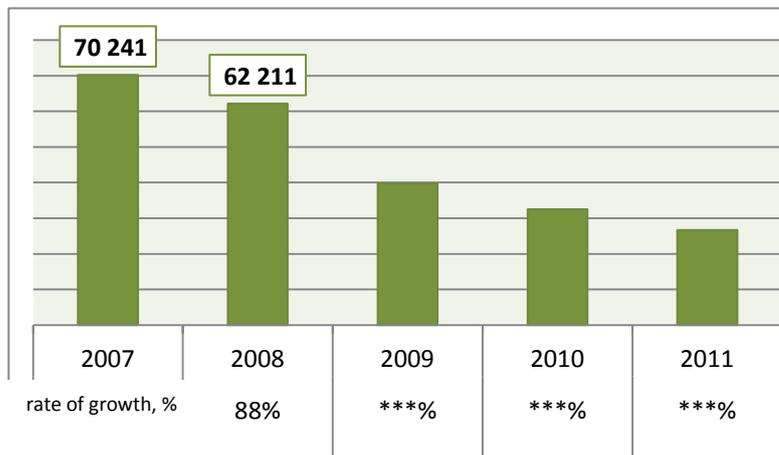


In 2011 the major part of meat was produced by poultry factories, and the share of production by the private sector made up only about ***%.

CHAPTER 11**ANALYSIS OF RUSSIAN IMPORT
OF TURKEY MEAT**

From 2008 till 2011 import of turkey meat reduced more than two times. In 2011 Russia imported products amounting to *** mln. dollars, that is by ***% less than in 2010. In *** import reached its maximum equal to *** mln. dollars.

In physical terms import also continued reducing. In 2011 *** ths. tons of turkey meat were delivered to Russia, that is by ***% less the rate of 2010. In total since 2007 export reduced by***% or *** ths. tons.



Dynamics of Russian import of turkey meat in 2007-2011, tons

In 2011 almost all products imported were constituted by ***, the share of carcasses was only ***%.

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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

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.

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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.

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