



**Intesco
Research
Group**

WORLD MARKET OF COMPOUND AND SUPPLEMENT FEED FOR POULTRY. RUSSIAN MARKET OF COMPOUND AND SUPPLEMENT FEED FOR POULTRY



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INFORMATION ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

RUSSIAN MARKET OF COMPOUND AND SUPPLEMENT FEED FOR POULTRY.
WORLD MARKET OF COMPOUND AND SUPPLEMENT FEED FOR POULTRY

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2012-2015

Regions of research:

RUSSIA

REGIONS OF RF

WORLD

Main blocks of research:

WORLD MARKET OF COMPOUND FEED

POULTRY POPULATION IN RUSSIA

VOLUME OF RUSSIAN MARKET OF COMPOUND AND SUPPLEMENT FEED

PRODUCTION SPECIFICS OF COMPOUND FEED AND SUPPLEMENT FEED IN
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ANALYSIS OF THE RUSSIAN EXPORT OF COMPOUND FEED

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TRENDS IN THE RUSSIAN MARKET OF COMPOUND AND SUPPLEMENT FEED

STATE REGULATION OF THE MARKET OF COMPOUND AND SUPPLEMENT
FEED

DEVELOPMENTAL FORECAST OF THE RUSSIAN MARKET OF COMPOUND
AND SUPPLEMENT FEED FOR 2012-2015

Profiles are made for the following largest Russian enterprises:

«BELGOROD PILOT PLANT OF FISH COMPOUND FEED» OJSC

«NOVOOSKOLSKY FEED MILL» CJSC

«LABAZ» LLC

«BELGOROD BAKERY PLANT» LLC

«NOVOOSKOLSKY FEED MILL» BRANCH CJSC

Information about the main enterprises' 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 the research:

Federal State Statistics Service

The Ministry of Economic Development of RF

The Ministry of Agriculture of RF

The Federal Customs Service

The Federal Tax Service

Industry experts' estimates

Reports on retail sales

Data of the main players of the branch

Printed and electronic publications of the branch

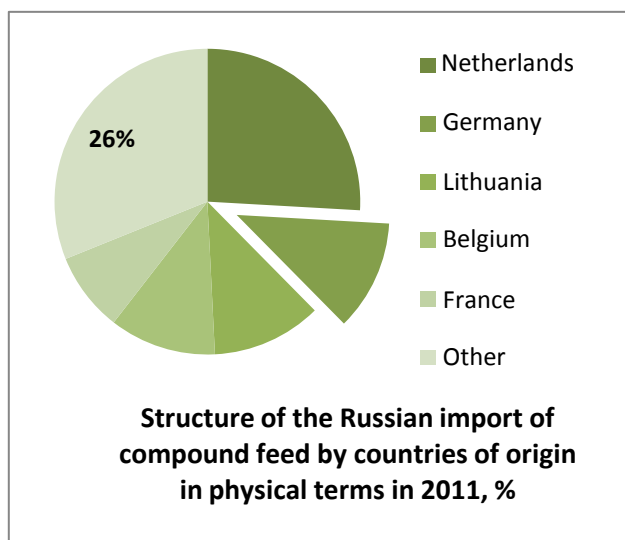
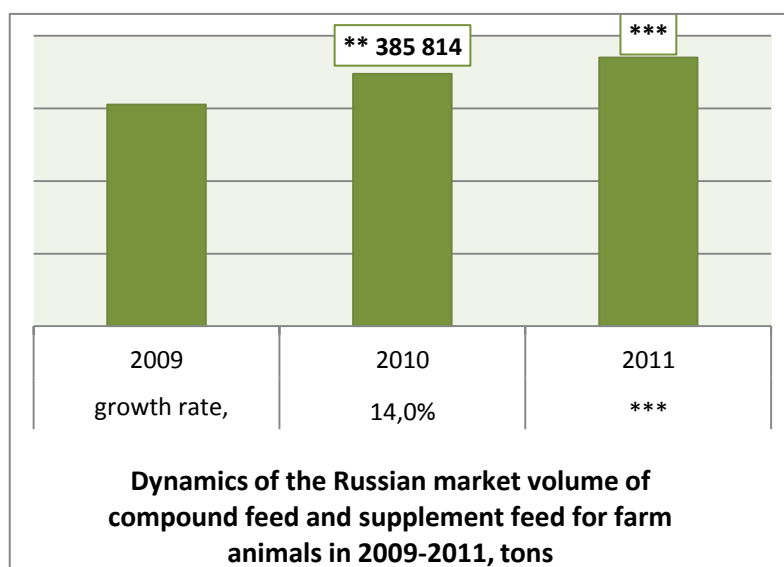
The research contains 68 schedules, 53 diagrams, 56 tables and 2 schemes.

EXTRACTS FROM RESEARCH

CHAPTER 5

VOLUME OF RUSSIAN MARKET OF COMPOUND AND SUPPLEMENT FEED FOR FARM ANIMALS AND POULTRY IN RUSSIA

According to Intesco Research Group estimates, the volume of the Russian market of compound feed increased by **%, for the period of 2009-2011, that amounts to *** mln. tons of products in physical terms. At the same time in 2010 the growth rate amounted to 14,0% in comparison with the previous year, in 2011 – ***% in comparison with 2010 or *** mln. tons of compound feed. The market volume of compound feed and supplement feed amounted to *** mln. tons in 2011.



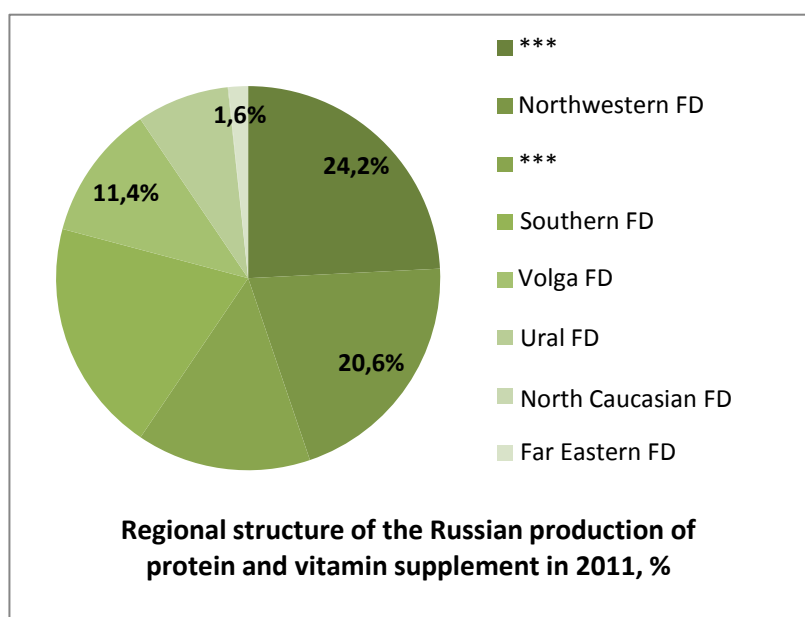
In 2011 one fourth of the products that were produced in other countries and imported to the Russian market were those of the Netherlands, the products that were imported from Germany accounted for ***% of all Russian import, Lithuanian suppliers – ***% – for a smaller share, ***% of the import were the products from Belgium. France imported about ***% of the total volume of compound feed products of foreign origin which was delivered to the Russian market.

CHAPTER 7***PRODUCTION OF COMPOUND FEED AND SUPPLEMENT FEED FOR FARM ANIMALS AND POULTRY IN RUSSIA***

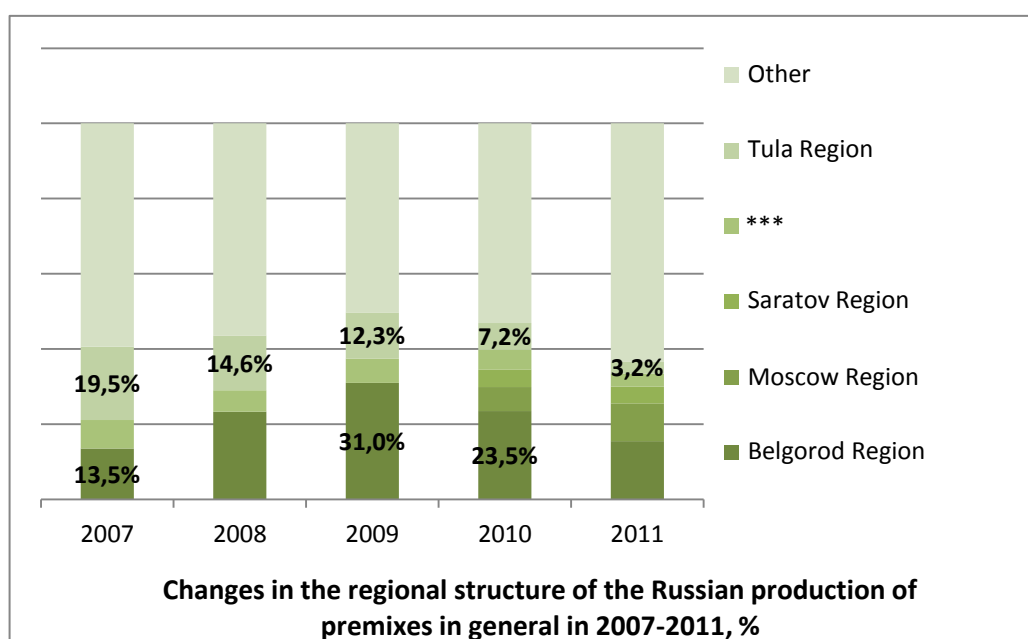
The Central federal district produced more than one fourth of the total volume of production of protein and vitamin supplement in 2011 (28,3%), the Northwestern federal district produced almost one fifth of the products (19,8%), at the same time the difference with the Siberian federal district amounted to 1,4 percentage points. The share of the Southern federal district amounted to 15%. The Volga federal district accounted for about 10%. The shares of each of other districts were less than 4%.

The period from 2007 to 2009 was characterized by positive dynamics of the growth in the share of Belgorod Region in the regional structure. Thus, in 2009 its number amounted to ***%. At the same time the share of other considerable region – Tula Region – was declining: at year-end results of 2009 the share decrease in the total structure was recorded by 1,7 percentage points.

Altai Territory in 2007-2009 was also among the largest premix producing regions.



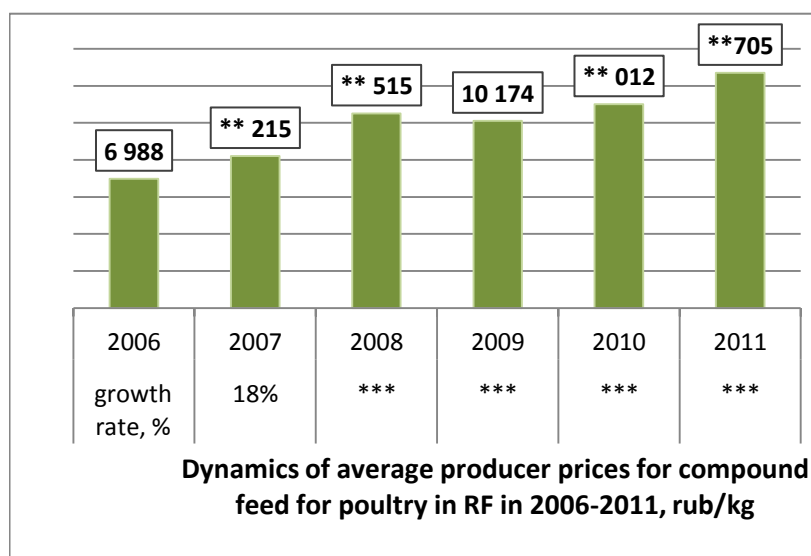
Two new premix producing regions appeared in 2010: Moscow and Saratov Regions, which accounted for **% and 4,7%, and this fact changed the regional structure quite considerably. The shares of other large regions declined in Belgorod Region by *** percentage points in comparison with the previous year, and it amounted to 23,5%, the share of Altai Territory decreased by 1,3 percentage points, Tula Region – by 5,1 percentage points.



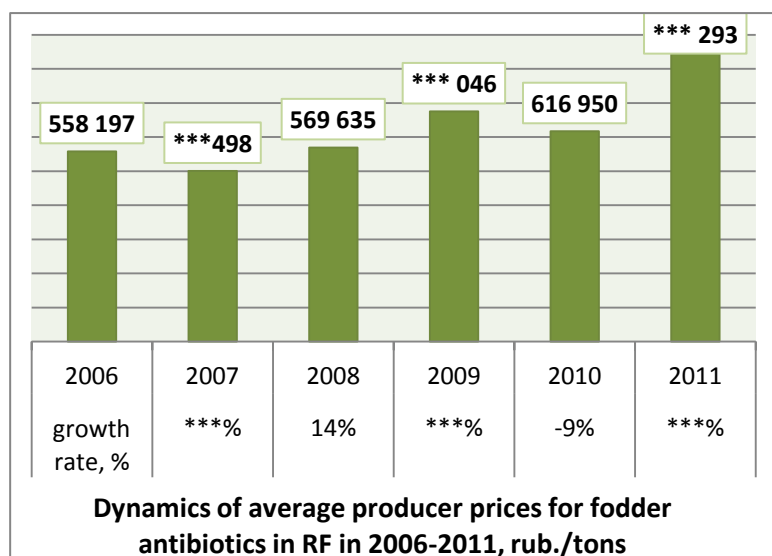
CHAPTER 13

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For the period of 2006–2011 producer prices for compound feed increased almost twice. At the same time there was a positive dynamics during the period excluding 2009, when there was a decrease in prices in comparison with the previous year by ***%. In 2011 the growth rate of price indexes amounted to **%, that affected the price, which was *** ths. rub/tons.



In 2007 the price for fodder antibiotics declined by 10% and amounted to *** ths. rub/tons in comparison with the previous year. The increase in prices has continued since 2008 and in 2009 it amounted to ***% or **5 ths. rub/tons.



But in 2010 there was a decrease in prices by 8,6% in comparison with the previous year, that was compensated in 2011 by a sudden growth rate (36%).

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