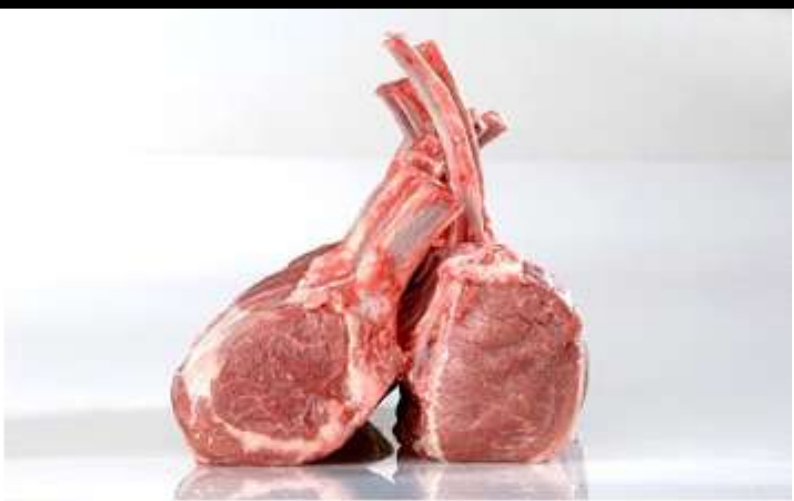




**Intesco
Research
Group**

WORLD MUTTON MARKET. RUSSIAN MUTTON MARKET – 2012



MOSCOW 2012

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RESEARCH METHODOLOGY

Subject of research:

MUTTON MARKET

Goal of research:

EVALUATION OF THE MARKET AND ITS DEVELOPMENT FOR 2013-2015

Regions of research:

RUSSIA AND REGIONS OF RUSSIA

COUNTRIES OF THE WORLD

MAIN BLOCKS OF RESEARCH:

WORLD MUTTON MARKET

SHEEP LIVESTOCK IN RUSSIA

VOLUME OF THE RUSSIAN MUTTON MARKET

ANALYSIS OF RETAIL SALES OF ANIMAL MEAT

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RETAIL PRICES ON THE RUSSIAN MUTTON MARKET

FORECAST OF MUTTON MARKET DEVELOPMENT FOR 2013-2015

Largest Russian companies with profiles:

«MOS-ET» LLC

«PUSHKINSKIY MYASNOY DVOR» LLC

«URYANKHAY» APK LLC

«AGROFIRMA «SOGRATL» SKHK

«MMK» LLC

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 agriculture of Russia

Federal Customs Service

Federal Tax Service

Food and agricultural organization UN

Expert evaluations

Reports on retail sales

Material of market players

Field print and electronic, business and specialized publications

The research contains 60 Schedules, 39 diagrams, 82 tables and 1 picture.

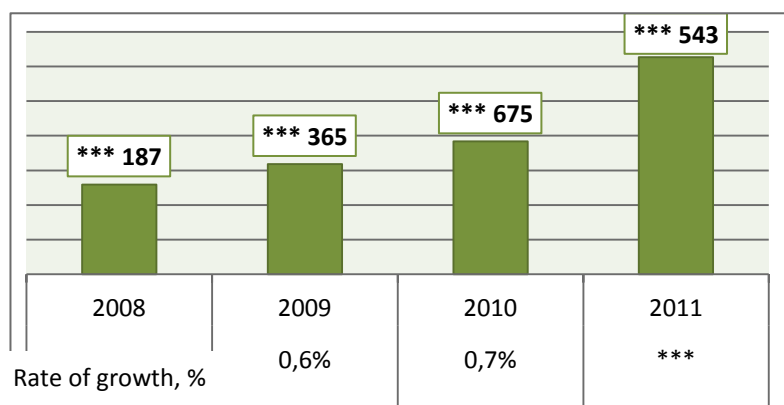
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VOLUME OF THE RUSSIAN
MUTTON MARKET

From 2006 to 2011 dynamics of the Russian mutton market volume was characterized by a growth. The pre-crisis rate of growth in 2007 amounted to 5,7%, in 2008 – **%, however in 2009 rate of growth slowed down, and amounted to 0,6%, in 2010 – 0,7%. In 2011 volume of the Russian mutton market amounted to ***543 tons, that was **% or 4*** tons more than in the previous year.

Market growth was due to an increase of the domestic production in 2011 by *% or 4 *** tons.



Dynamics of the Russian mutton market (in fresh-killed weight) in 2008-2011, tons

In the structure of the Russian mutton market in 2011 domestic production prevailed, which had 9*%. The share of imported products amounted to *%.

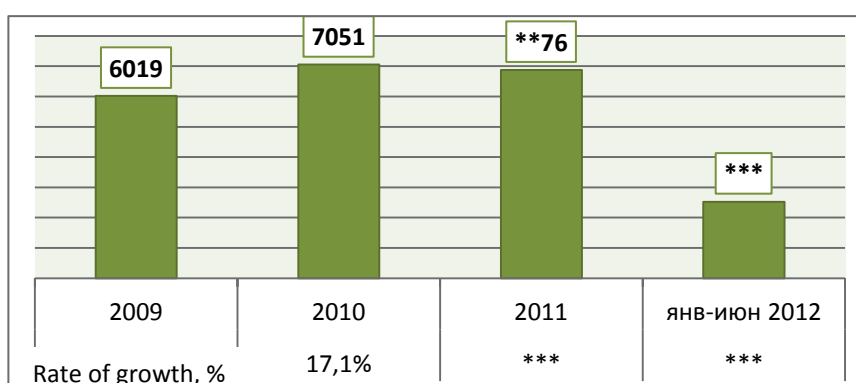


Import content on the Russian market of mutton (in slaughter weight) in physixcal terms in 2011, %

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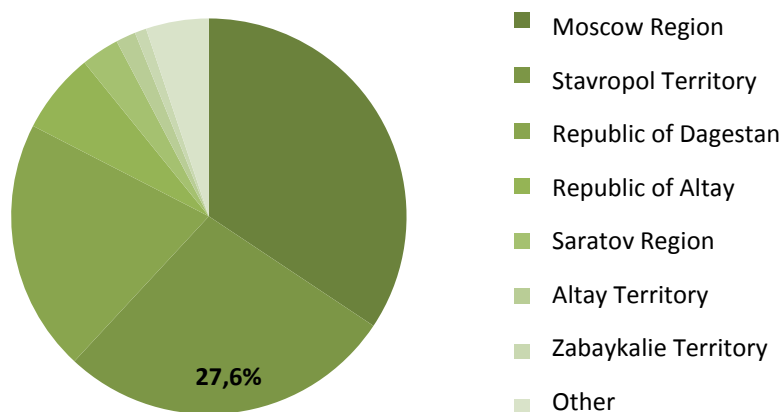
MUTTON PRODUCTION

During 2008-2010 production of fresh, cooled and cold mutton increased by *** тонн (or by **%). In 2009 rate of growth amounted to **%, in 2010 – 17,1%. In 2011 a positive dynamics changed by reversed dynamics and production decreased by *** tons or *%.



Dynamics of the volume of Russian production of fresh, cooled and cold mutton in 2008-June 2012, tons

In the regional structure of the Russian production of fresh, cooled and cold mutton in 2011 production of these goods was concentrated in three regions: Moscow Region (with *%), Stavropol Territory (27,6%) and Republic of Dagestan (*%). The share of other regions was equal to 17,4%.

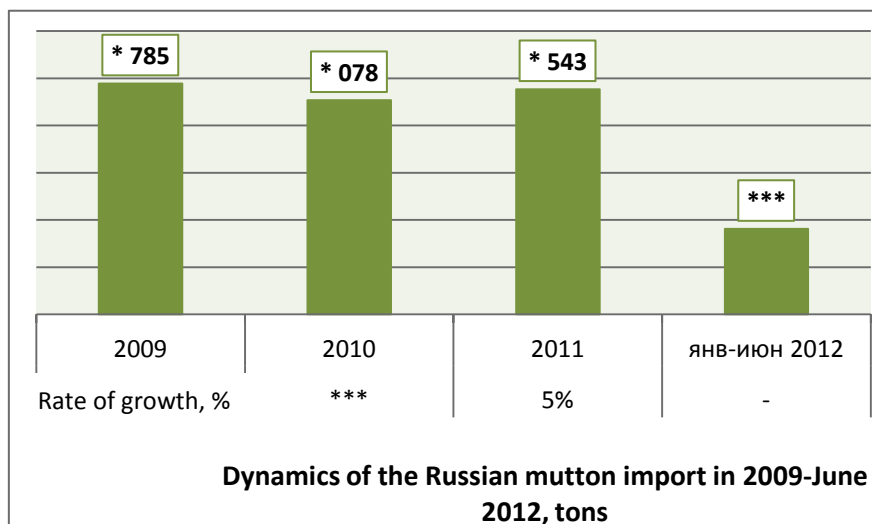


Regional structure of the Russian production of fresh, cooled and cold mutton in 2011, %

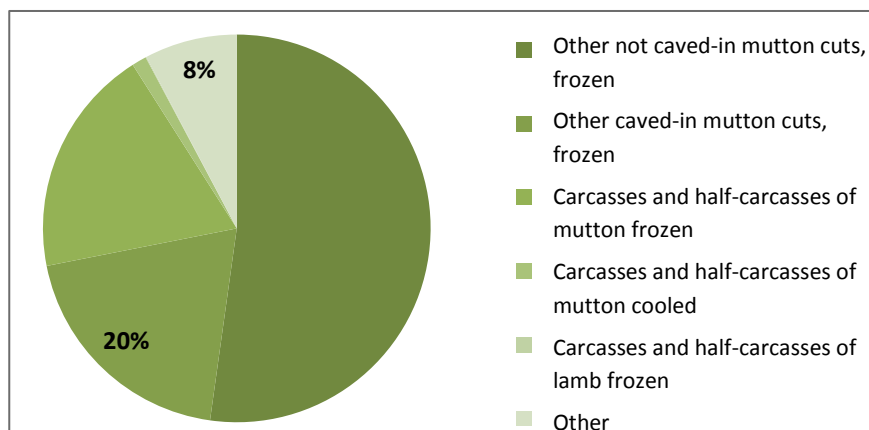
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In 2010 parameters of import volume of this product showed the minimum for the last four years – *** tons. In 2011 dynamics of mutton supplies changed, parameters increased by *% or 465 tons and amounted to *543 tons.



The largest share of mutton supplies in 2011 in cost terms belonged to frozen mutton cuts with bones, which amounted to a half of all Russian mutton import (52,2%). Supplies of



Structure of the Russian import of mutton by types in cost terms in 2011, %

boneless frozen mutton cuts and frozen carcasses and half-carcasses amounted to *% and *% respectively.

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Schedule 59. Dynamics of the Russian mutton market volume in 2009-2011 and forecast for 2012-2015, tons

Schedule 60. Dynamics of import content on mutton market in physical terms in 2009-2011 and forecast for 2012-2015, %

ABOUT INTESCO RESEARCH GROUP

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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**

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