



**Intesco
Research
Group**

SAUSAGES AND SAUSAGE PRODUCTS. RUSSIAN MARKET OF SAUSAGES AND SAUSAGE PRODUCTS – 2012



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RESEARCH METHODOLOGY

Subject of research:

MARKET OF SAUSAGES AND SAUSAGE PRODUCTS

Goal of research:

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

Regions of research:

RUSSIA AND RF REGIONS

Main blocks of research:

VOLUME OF RUSSIAN MARKET OF SAUSAGE PRODUCTS
ANALYSIS OF RETAIL SALES OF MEAT PRODUCTS
PRODUCTION OF SAUSAGE PRODUCTS IN RUSSIA
ANALYSIS OF RUSSIAN IMPORT OF SAUSAGE PRODUCTS
ANALYSIS OF RUSSIAN EXPORT OF SAUSAGE PRODUCTS
PRODUCER PRICES FOR SAUSAGE PRODUCTS IN RUSSIA
RETAIL PRICES FOR SAUSAGE PRODUCTS
STATE REGULATION OF RUSSIAN MARKET OF SAUSAGE PRODUCTS
TRENDS ON RUSSIAN MARKET OF SAUSAGE PRODUCTS
DEVELOPMENT FORECAST FOR RUSSIAN MARKET OF SAUSAGE PRODUCTS FOR 2012-2015

Largest Russian enterprises with profiles drawn up:

“OSTANKINSKY MYASOPERERABATYVAYUSHSCY KOMBINAT” JSC
“MIKOYANOVSKY MYASOKOMBINAT” CJSC
“CHERKIZOVSKY MYASOPERERABATYVAYUSHSCY ZAVOD” JSC
“TSARITSYNO” JSC
“VELIKOLUKSKY MYASOKOMBINAT” JSC

The research includes the main enterprises’ production volumes, financial performance of activities, balance sheets, profit-and-loss reports, cash-flow statements, subsidiary enterprises and other information.

Information sources used:

Federal State Statistics Service
Ministry of Economic Development
Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sales reports
Materials of the field's main players
Field printed and electronic publications

The research presents 81 schedules, 51 diagrams, 87 tables and 1 scheme.

EXTRACTS FROM RESEARCH

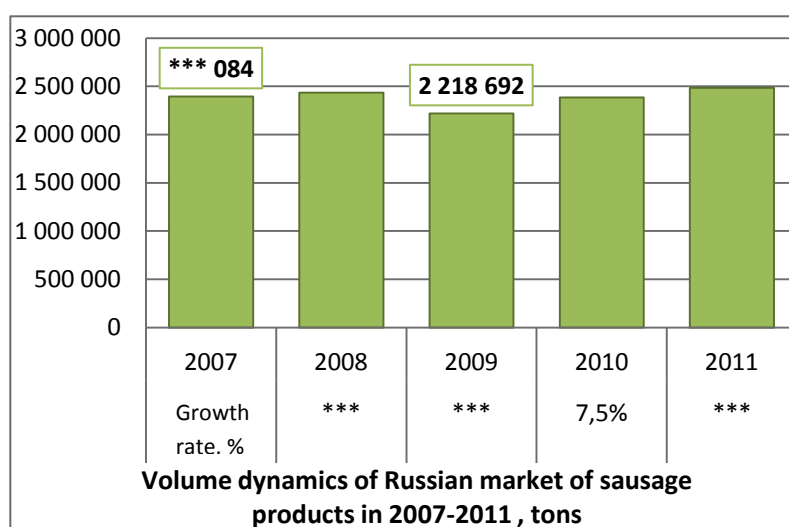
CHAPTER 3

VOLUME OF RUSSIAN MARKET
OF SAUSAGE PRODUCTS

In 2011 the volume of Russian market of sausage products increased by ***% and made up about *** mln tons of products.

In 2009 per capita consumption of sausage products in Russia decreased **,7 kg to **,6, while in 2010 the index started from *** and began to reach ***, and per capita consumption in Russia made up ***,** kg/person.

In 2011 the given index continued *** and reached **,4 kg/person.



Russian market of sausage products is fully *** The share of products produced *** in 2011 did not exceed **,7%.

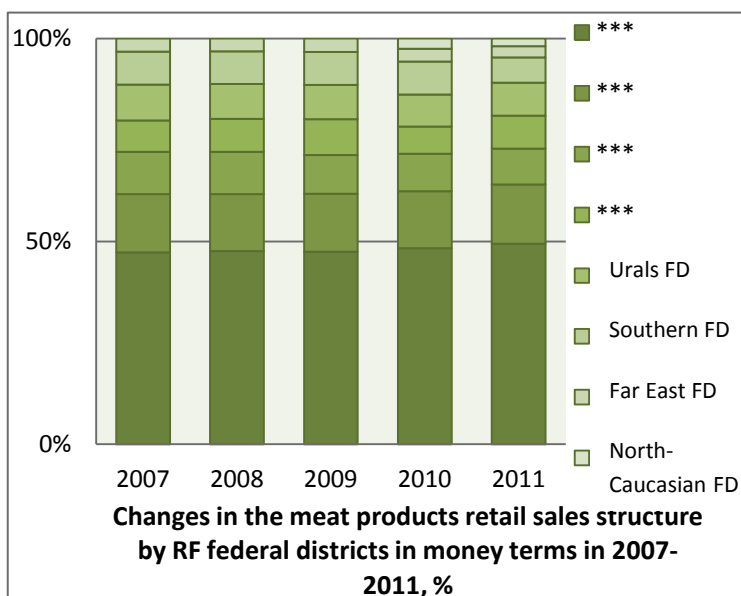
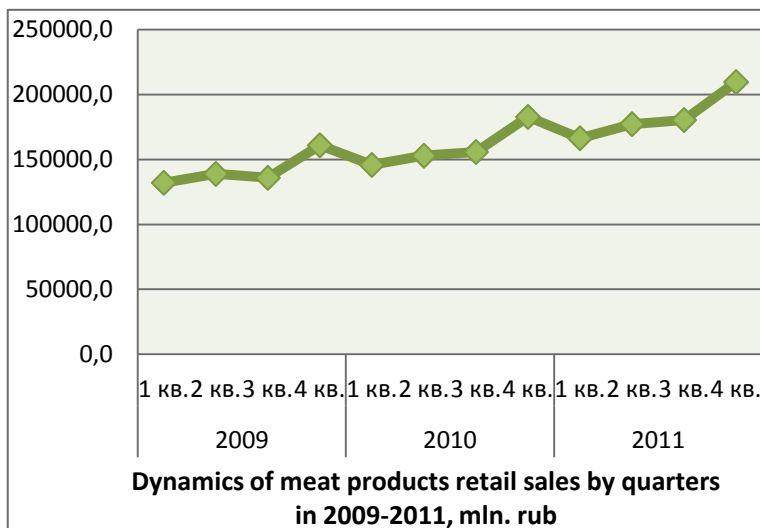


CHAPTER 4

ANALYSIS OF RETAIL SALES OF MEAT PRODUCTS

In 2011 the volume of meat products retail sales increased by **,1% and made up *** bln rub.

The largest sales volume in money terms was observed in *** federal district (FD). For the period of 3 quarters of 2011 they sold products for the sum of 259,3 bln rub. Like in 2010, in 2011 the second place occupied by *** FD. Here they sold sausage products for the sum that was **,4 times as small and that made up *** bln rub. The Siberian FD is the third largest region by the retail sales volume that made up 4** bln rub, that was ***% (** ths. rub) more than in 2010.



On the whole, the situation with retail sales of sausage products changes with the flow of times ***

*** the largest share of consumption of sausage products was recorded in *** (***%). Correspondingly, the largest share of sausage products sales was recorded in ***. According to Intesco Research Group experts, retail sales volume of sausage products in money terms in 2012 will make up ***.

CHAPTER 8

ANALYSIS OF RUSSIAN MARKET
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During the period from 2008 to 2010 import of sausages and sausage products to RF territory in physical terms *** and in three years *** by ***%.

Import dynamics in 2011 *** import dynamics in 200*. This year was characterized by *** import volume during the period from *** to May, then there was a sharp fall *** by **4%. It was followed by a steady **8 of the index to 8**. In November there was a low fall by **%.



Leaders of sausage products supply to Russia *** are USA, Spain, Hungary, Netherlands, Latvia.

Russian sausage products import volumes by supplying countries in 2007-2011, tons

	2007	2008	2009	2010	2011
All world countries	29***	***	***91	****9	***
Spain	***	***	***	***	***
Hungary	***	***	***	***	***
USA	***	***	***	***	***
Netherlands	***	***	***	***	***
Latvia	***	***	***	***	***
Italy	***	***	***	***	***
Lithuania	***	***	***	****	***
Austria	***	***	***	***	***

CHAPTER 9

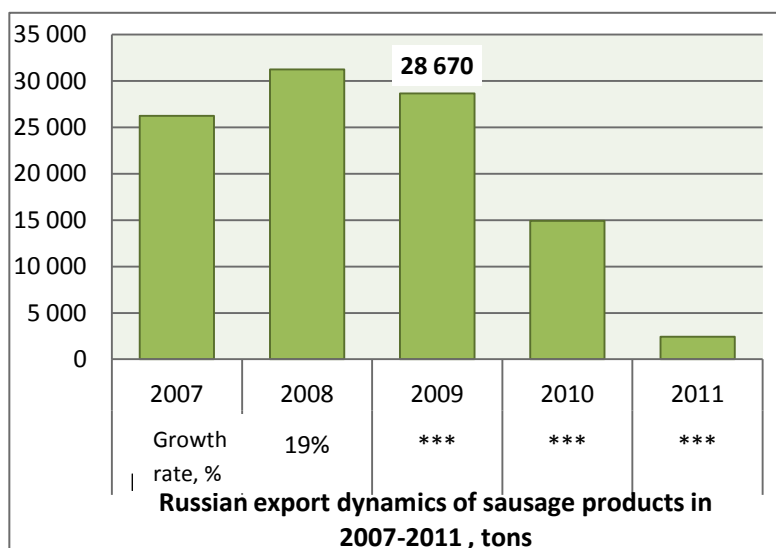
ANALYSIS OF RUSSIAN EXPORT
OF SAUSAGE PRODUCTS

Export of the products was carried out in accordance with Code ***:

- ***100 Sausages and similar meat, meat by-products and blood products; ready-to-eat products cooked with them

Export duty: ***

Export license: ***



In July of 20** there was a sharp decrease *** of export volume. The index *** from **,8 ths. tons to **,3 ths. tons. During the second *** of 2010 and during 20** export volume *** about the level of **,2 ths. tons, having made up **,2 ths. tons in December of 2011.

In 2011 there was *** of the index by **%, export volume made up **,4 ths. tons.

Main countries of Russian sausage products supply in 2011 were ***, Azerbaijan. In money terms in 2011 export of Russian sausage products in *** made up **,9 mln. dollars, while *** of RF of the imported products to the second largest exporter country, ***, made up **,8 mln. dollars.

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