



**Intesco
Research
Group**

WORLD MARKET OF POULTRY MEAT RUSSIAN MARKET OF POULTRY MEAT



MOSCOW 2012

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RESEARCH METHODOLOGY

SUBJECT OF RESEARCH:

WORLD MARKET OF POULTRY MEAT. RUSSIAN MARKET OF POULTRY MEAT.

GOAL OF RESEARCH:

ASSESSMENT OF SITUATION ON THE MARKET & FORECAST OF ITS
DEVELOPMENT FOR 2012-2014

REGIONS OF RESEARCH:

WORLD

RUSSIA AND REGIONS OF RF

MAIN BLOCKS OF RESEARCH:

WORLD MARKET OF POULTRY MEAT

POPULATION OF POULTRY MEAT IN RUSSIA

VOLUME OF RUSSIAN POULTRY MEAT MARKET

ANALYSIS OF RETAIL SALES OF POULTRY MEAT

COMPETITION ON RUSSIAN POULTRY MEAT MARKET

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CONSUMERS' PREFERENCES ON RUSSIAN POULTRY MEAT MARKET

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FORECAST OF POULTRY MEAT MARKET DEVELOPMENT FOR 2012-2014

LARGEST RUSSIAN ENTERPRISES WITH PROFILES COMPOSED:

NOVOSKOLSKY SUBSIDIARY “PRIOSKOLYE”, CJSC

“PETELINSKY PP”, LTD

“POULTRY FACTORY “SEVERNAYA”, JSC

“POULTRY FACTORY “NOVO-YEZDOTSKAYA”, LTD

“CHELNY-BROILER”, LTD

“POULTRY FACTORY “VASILYEVSKAYA”, CJSC

Production volumes, financial activities, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other data about these main companies are presented in the report.

INFORMATION SOURCES USED:

Federal State Statistics Service

Ministry of Agriculture of RF

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sales reports

Materials of the field's main players

Field print and electronic publications

The research contains 68 schedules, 66 diagrams, 54 tables.

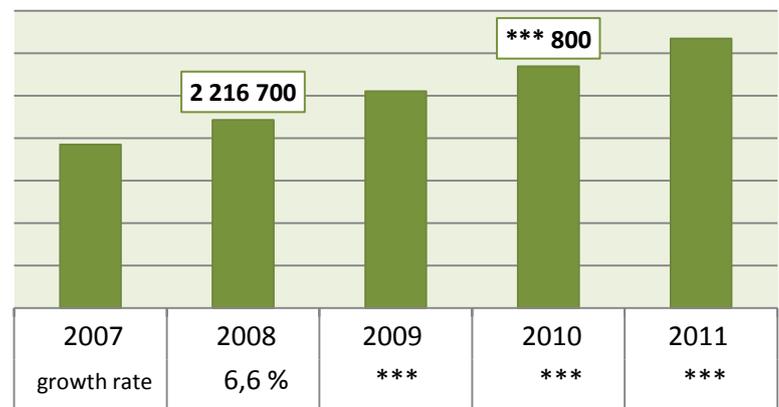
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VOLUME OF RUSSIAN POULTRY
MEAT MARKET

Russian poultry meat market indicates *** during the last three years. At the present time, the main trend is ***.

In 2011, the market volume in physical terms accounted for *** mln. tons. That rate went up by ***% for a year. Despite the increase by ***% in 2011 of domestic poultry meat output, the less growth of rate of the Russian market volume was a result of *** and ***.



Dynamics of Russian poultry meat market in 2007-2011, tons



Comparison of average retail prices for meat by types in 2011, rub/kg

Boneless pork was cheaper than beef by **%, its average price in 2011 amounted to *** rubles per a kg.

Among the meats with bones, mutton was the most expensive one. A kilogram of that kind of meat cost *** rubles on average, so it is by **% more expensive than beef and by **% - than pork.

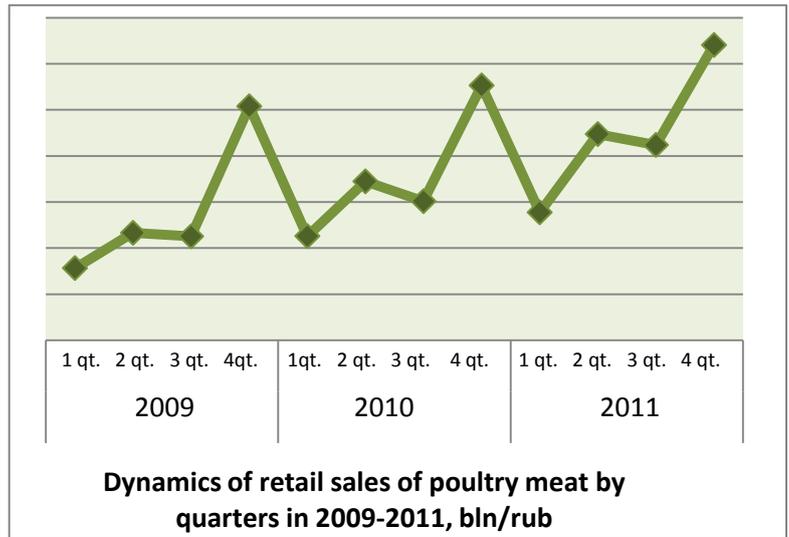
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ANALYSIS OF RETAIL SALES OF POULTRY MEAT

In 2009-2011 the general tendency of retail sales of poultry meat was observed: the peak of sales was during *** and changed in *** in a first quarter of the following year.

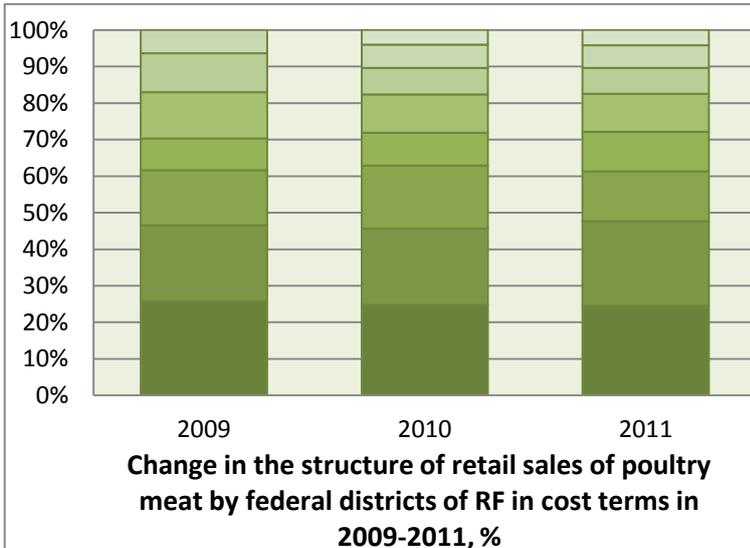
The biggest revenue from retail sales in 2011 was in *** of 2011 and amounted to *** bln. rubles that is by ***% more than during the same period of 2010 and by ***% higher than in 2011.

The drop of retail sales in *** of 2010 - *** was ***% that is by *** p.p. less than in the same period of 2009-2010.



Dynamics of retail sales of poultry meat by quarters in 2009-2011, bln/rub

Besides, *** was shown in a second and *** in a third quarters: by ***% and ***% respectively. In 2010, these indices were ***% and ***% respectively.



Change in the structure of retail sales of poultry meat by federal districts of RF in cost terms in 2009-2011, %

During 2011 the share *** of FD in the structure of retail prices of poultry did not changed. The share of Central FD increased by *** p.p., as the share of ** district. The share of Ural district reduced on the contrary by *** p.p.

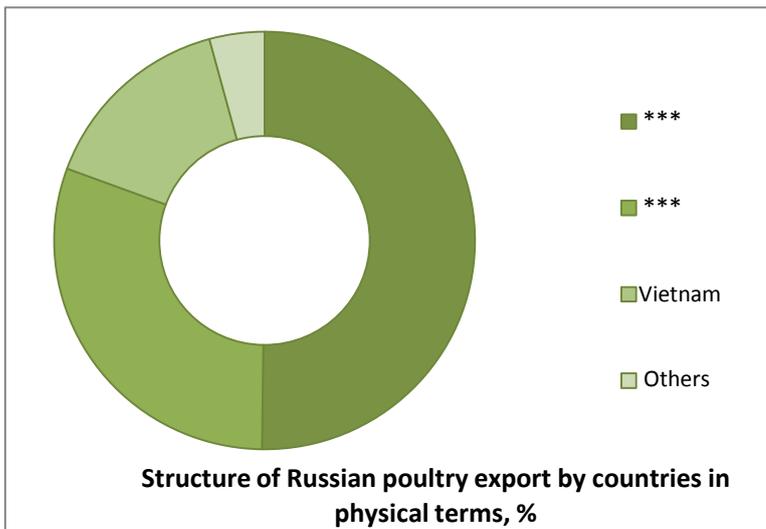
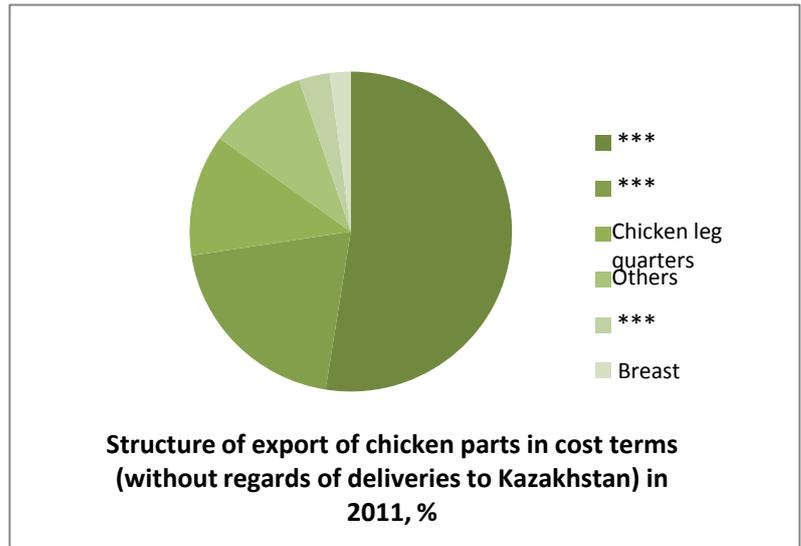
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Structure of meat export by types made in Russia is almost fully formed of poultry meat. The export of pork, mutton and cattle from Russia in 2011 was very low both in physical and cost terms and amounted to about ***%.

Major exporting products to far abroad were variety meats or frozen parts of carcasses, mostly whole legs (***% of volume in money terms) and *** (***% of volume in money terms).

The main part in physical terms is assigned to *** - they occupy ***% of export volume.



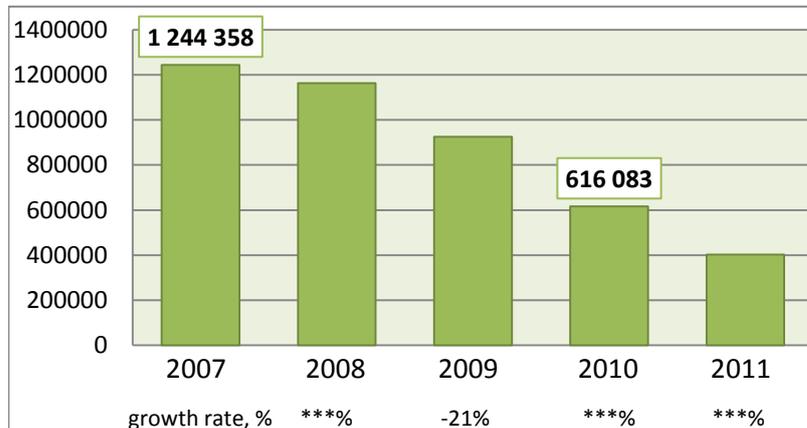
Half of all exporting products in 2011 was reserved for *** market. 30% more consumed ***, and Vietnam had the share of ***%.

CHAPTER 12

ANALYSIS OF RUSSIAN POULTRY
MEAT IMPORT

As of 2007 the volume of importing products of that category was rapidly falling down. The volume of imported poultry meat during this period dropped by *** ths. tons and in 2011 was *** ths. tons. In the last two years the reduction rate of deliveries was more than ***% a year.

Quota on import in 2011 was *** compared to the previous year. The reasons were *** and ***.



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

In 2012, the import of poultry is planned *** by ***%. The expected *** is connected with *** and ***.

The import volume in money terms for 2007-2011 changed in ***: in 2011, there were imported the products at the sum by

*** times lower than in 2007 (*** ths. dollars and *** ths. dollars respectively). The rate of decrease of importing products in 2011 amounted to ***%.

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