

Intesco
Research
Group

MARKET OF FLOUR CONFECTIONERY



LIST OF CONTENT

CONTENT	3
METHODOLOGY OF RESEARCH	9
EXTRACTS FROM RESEARCH.....	11
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	14
ABOUT INTESCO RESEARCH GROUP	25

CONTENT

METHODOLOGY OF RESEARCH

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

- 1.1. Population of Russia
- 1.2. Economic situation
- 1.3. Special economic zones
- 1.4. Entrepreneurship development in Russia
- 1.5. Investment potential
- 1.6. Position of Russia in the world

2. SUBJECT OF RESEARCH

- 2.1. Basic definitions and identification of flour confectionery goods
- 2.2. Classification of flour confectionery

Classification by FEA CN

Classification by ARCP

Classification by ARCPEA

All-Russian Classifier of Types of Economic Activity

3. VOLUME OF RUSSIAN FLOUR CONFECTIONERY GOODS MARKET

- 3.1. Dynamics of flour confectionery goods market volume by years in physical terms
- 3.2. Import share on the Russian flour confectionery market
- 3.3. Dynamics of import share on the Russian flour confectionery market
- 3.4. Consumption of flour confectionery per capita

4. SEGMENTATION OF RUSSIAN FLOUR CONFECTIONERY MARKET

- 4.1. Segmentation by groups of confectionery
- 4.2. Segmentation of products by shelf-life
- 4.3. Segmentation of products by types

5. ANALYSIS OF CONFECTIONERY RETAILS IN RUSSIA

- 5.1. Dynamics by years
- 5.2. Dynamics by quarters
- 5.3. Structure by federal districts of RF
- 5.4. The largest regions of RF by retail sales
- 5.5. Regional structure of retail sales

6. RAW MATERIALS BASE. FLOUR

- 6.1. Dynamics of production volumes by years
- 6.2. Dynamics of production volumes by months
- 6.3. Production volumes in federal districts of Russia
- 6.4. Structure of production by federal districts of RF

6.5. Volumes of production in regions of RF

6.6. Regional structure of production

6.7. Producers' prices

6.8. Retail prices

7. PRODUCTION OF FLOUR CONFECTIONERY IN RUSSIA

7.1. Dynamics by years

7.2. Dynamics by months

7.3. Volumes by federal districts of RF

7.4. Structure by federal districts of the RF

7.5. Volumes by regions of the RF

7.6. Regional structure

8. STRUCTURE OF CONFECTIONERY PRODUCTION

8.1. Segmentation by confectionary types

8.2. Segmentation by flour confectionery types

9. PRODUCTION IN SEPARATE SEGMENTS OF FLOUR CONFECTIONERY

9.1. Long shelf life confectionery

Waffles

Sweet biscuits

Ginger biscuits

Hard biscuits and crackers

Muffins

Rolled cakes

Pryaniki

Ginger cakes

Rum babas

9.2. Flour confectionery of short shelf life

Tortes

Cakes

Eastern confectionery

10. THE LARGEST RUSSIAN PRODUCERS OF FLOUR CONFECTIONERY

10.1. Enterprises of the field by proceeds

10.2. Enterprises rated by profitability

10.3. Structure of enterprise location by regions

11. ANALYSIS OF FLOUR CONFECTIONERY IMPORT

11.1. Flour confectionery (total volume)

Dynamics of volume by years and months

Structure by supplying countries

Structure by types

11.2. Waffles

Dynamics of volume by years
Dynamics of volume by months
Structure by supplying countries

11.3. Biscuits

Dynamics of volume by years
Structure by supplying countries

11.4. Ginger biscuits

Dynamics of volume by years
Dynamics of volume by months
Structure by supplying countries

12. ANALYSIS OF FLOUR CONFECTIONERY EXPORT

12.1. Flour confectionery (in total)

Dynamics of volume by years
Structure by countries of destination
Structure by types

12.2. Waffles

Dynamics of volumes by years
Dynamics of volumes by months
Structure by countries of destination

12.3. Biscuits

Dynamics of volumes by years
Dynamics of volumes by months
Structure by countries of destination

12.4. Ginger biscuits

Dynamics of volumes by years
Dynamics of volumes by months
Structure by countries of destination

13. PRODUCERS' PRICES FOR FLOUR CONFECTIONERY

13.1. Tortes and cakes

Dynamics by years
Dynamics by months

13.2. Waffles

Dynamics by years
Dynamics by months

13.3. Biscuits

Dynamics by years
Dynamics by months

13.4. Pryaniki and ginger cakes

Dynamics by years

Dynamics by months

14. RETAIL PRICES FOR FLOUR CONFECTIONERY IN RUSSIA

14.1. Biscuits

Dynamics by years

Dynamics by months

14.2. Pryaniki

Dynamics by years

Dynamics by months

14.3. Muffins and rolled cakes

Dynamics by years

Dynamics by months

14.4. Tortes

Dynamics by years

Dynamics by months

15. TRENDS ON THE RUSSIAN FLOUR CONFECTIONERY MARKET

15.1. Foreign technologies or unique products

15.2. Confectionery package

15.3. Segment of special products: healthy, kosher, halal

15.4. Confectionery range expansion

15.5. Frozen semi-finished products and confectionery

15.6. Food ingredients in confectionery production

16. DISTRIBUTION CHANNELS ON THE MARKET OF CONFECTIONERY

16.1. Development of new channels formats

16.2. Retail chains

16.3. Producers own retail sale

16.4. Online shops

17. STATE REGULATIONS OF FLOUR CONFECTIONERY MARKET

17.1. Marking and labeling of confectionery products

17.2. Price regulation

17.3. Duties for the confectionery in WTO and Customs Union

17.4. Confectionery industry development strategy

18. CONSUMER PREFERENCES ON FLOUR CONFECTIONERY GOODS MARKET

18.1. Consumer preferences on flour confectionery market

18.2. Small piece confectionery goods

18.3. Preferences on the market of biscuits

19. PROFILES OF THE LARGEST ENTERPRISES BY CONFECTIONERY GOODS PRODUCTION

19.1. «KDV Yashkino» LLC

Reference information

Types of activity

Production volumes

Balance sheet

Profit and loss statement

Cash-flow statement

Financials

19.2. AKKOND, OJSC

Reference information

Types of activity

Production volumes

Balance Sheet

Profit and loss statement

Cash flow statement

Financials

Table 102. Financials of «AKKOND»

19.3. KONTI-RUS, CJSC

Reference information

Types of activity

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

19.4. «Chipita Saint Petersburg» LLC

Reference information

Production volumes

Balance sheet

Profit and loss statement

Cash-flow statement

Financials

19.5. «FILI-BAKER», LLC

Reference

Types of activity

Balance sheet

Profit and loss statement

Financials

**20. FORECAST OF THE MARKET OF FLOUR CONFECTIONERY DEVELOPMENT FOR
2015-2016
ABOUT INTESCO RESEARCH GROUP**

METHODOLOGY OF RESEARCH

Subject of research:

MARKET OF FLOUR CONFECTIONERY

Purpose of reserch:

EVALUATION OF THE MARKET STATE AND FORECAST FOR ITS DEVELOPMENT FOR 2015-2016

Regions of research:

RUSSIA, REGIONS OF THE RF

Main blocks of research:

ANALYSIS OF RETAIL SALES OF CONFECTIONERY IN RUSSIA
VOLUME OF THE RUSSIAN MARKET OF FLOUR CONFECTIONERY
SEGMENTATION OF THE MARKET OF FLOUR CONFECTIONERY
RAW MATERIALS BASE FOR FLOUR CONFECTIONERY PRODUCTION
PRODUCTION OF FLOUR CONFECTIONERY IN RUSSIA
PRODUCTION IN SEPARATE SEGMENTS
THE LARGEST RUSSIAN PRODUCERS OF FLOUR CONFECTIONERY
ANALYSIS OF EXPORT OF FLOUR CONFECTIONERY
ANALYSIS OF IMPORT FLOUR CONFECTIONERY
PRODUCERS' PRICES FOR FLOUR CONFECTIONERY
RETAIL PRICES FOR FLOUR CONFECTIONERY IN RUSSIA
TRENDS ON THE RUSSIAN MARKET OF FLOUR CONFECTIONERY
STATE REGULATION OF THE MARKET OF FLOUR CONFECTIONERY
DISTRIBUTION CHANNELS ON THE MARKET OF FLOUR CONFECTIONERY
CONSUMER PREFERENCES ON THE MARKET OF FLOUR CONFECTIONERY
FORECAST FOR DEVELOPMENT OF THE MARKET OF FLOUR CONFECTIONERY FOR 2015-2016

Types of flour confectionery researched herein:

Waffles
Hard biscuits and crackers
Biscuits (sweet, ginger)

Muffins
Rolled cakes
Pryaniki
Ginger cakes
Tortes
Cakes
Eastern sweets

The largest Russian enterprises profiled:

«KDV YASHKINO», LLC
«AKKOND», OJSC
«KONTI-RUS», CJSC
«CHIPITA SAINT PETERSBURG», LLC
«FILI-BAKERS», LLC

The largest enterprises are presented by production volume, financial activity, 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 98 schedules, 60 diagrams, 120 tables and 1 figure.

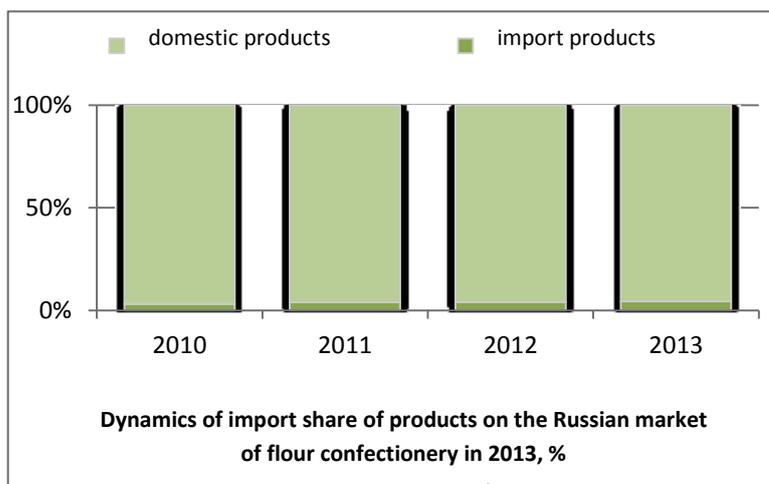
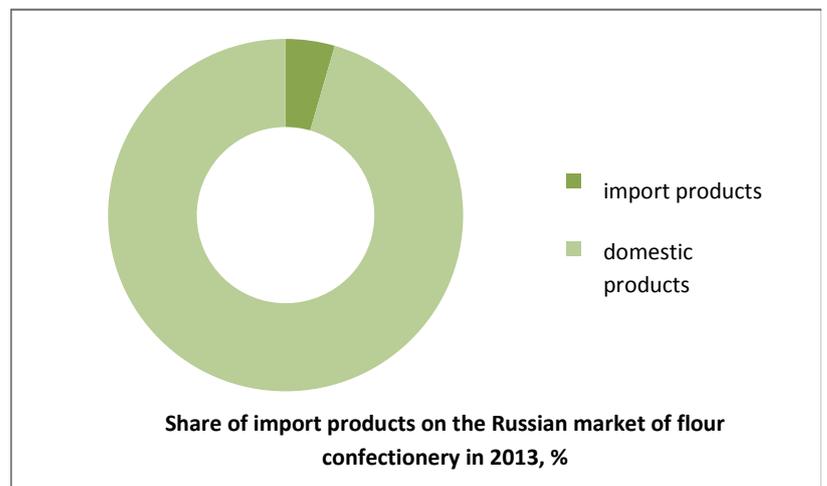
EXTRACTS FROM RESEARCH

CHAPTER 3

VOLUME OF RUSSIAN MARKET OF FLOUR
CONFECTIONERY

A two year crisis decrease (2008 - 2009) in the dynamics of Russian import of flour confectionery followed by growth of import deliveries started in 2010. Amount of products imported in 2011 was by 25.7% larger than in the previous year; in 2012-2013 increase rates were at the level of 8-9%.

Against a slowed down increase of production, active growth of import affected share of foreign products on Russian market. According to the experts of Intesco Research Group in 2013 import products reached **% of the market, that is by 1.3 p.p. exceeds values of 2010. Considering an

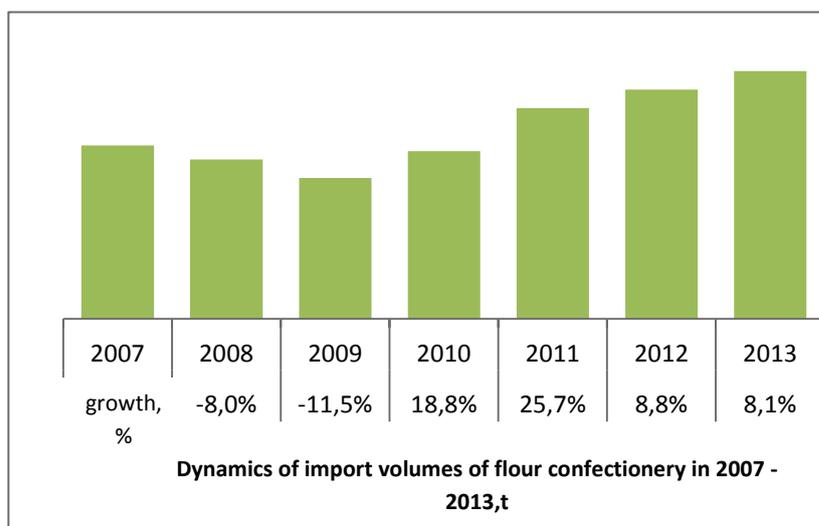


increasing demand for non-traditional flour products among Russian population, foreign companies are able to enlarge their share in Russia.

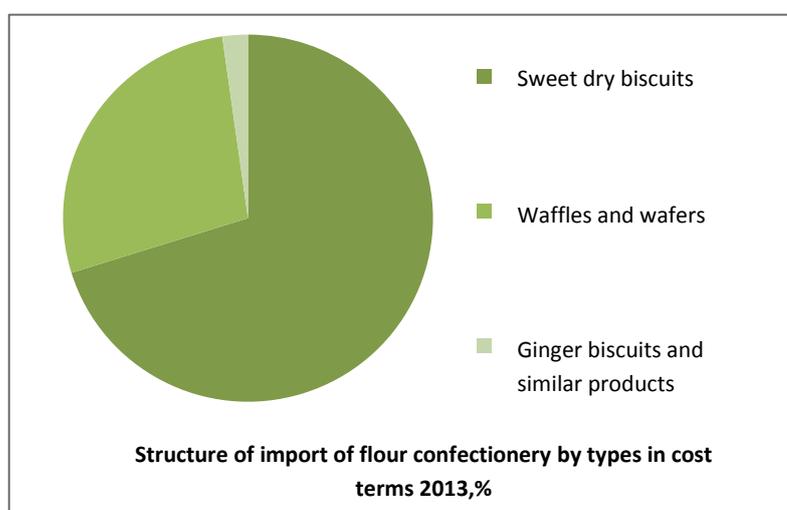
CHAPTER 11

ANALYSIS OF IMPORT OF
FLOUR CONFECTIONERY

In 2007 – 2009 volume of flour confectionery imported to Russia was characterized by *типичные* dynamics. In two years deliveries reduced by 18.6% or ** *тс. т.* However from 2010 volumes started recovering, and already in 2011 they exceeded the values of 2007. It should be noted that the largest increase in volumes of import products (more than by one fourth) was recorded exactly in 2011.



In 2013 ** *тс. т.* of products were delivered to Russian market. It is by 8.1% more than the value of 2012.



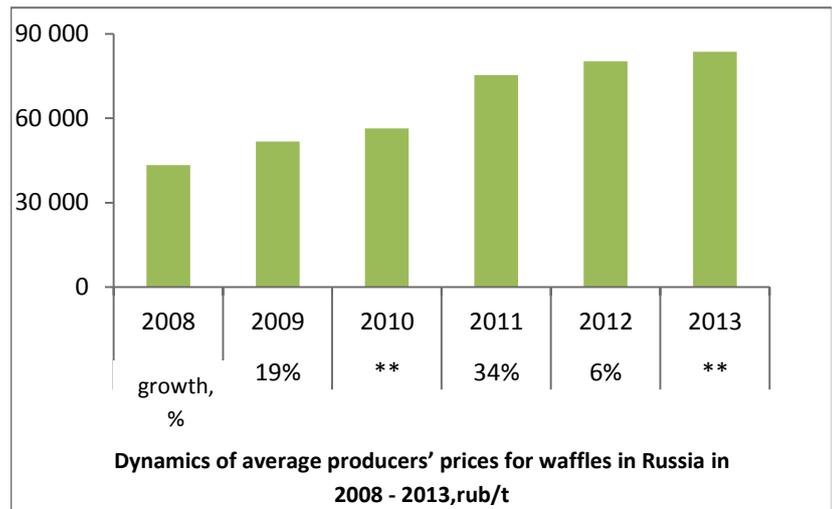
The largest share in the structure of Russian import of flour confectionery in 2013 was constituted by dry sweet biscuits – 73%. One fifth was made up by waffles and wafers (22%) and only 5% belonged to ginger biscuits and similar products.

CHAPTER 13

PRODUCERS' PRICES FOR FLOUR
CONFECTIONERY

During 2008-2013 growth of sale prices for waffles has been observing. In 2013 the price grew almost 2 times in comparison to 2008 and amounted to **7 ths. rub/t. At that it should be noted that during last two years increase rate of prices for waffles was lower than the official inflation rate (*% in 2013).

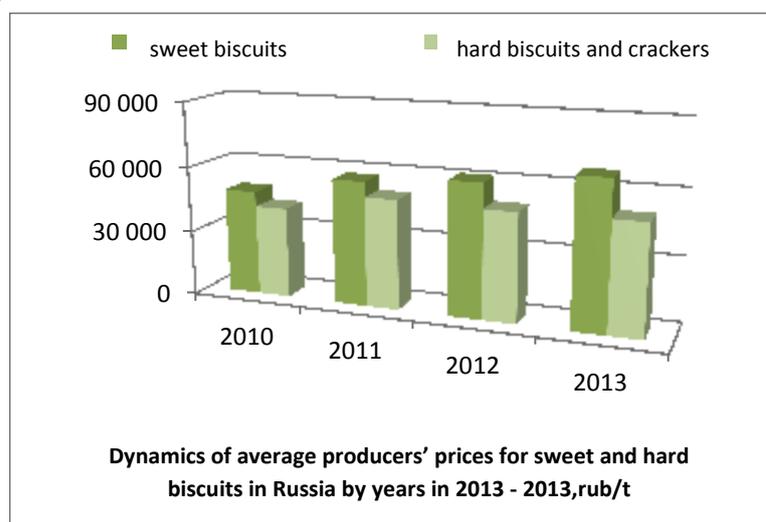
Throughout the period analyzed average producers' prices for biscuits demonstrated a steady growth. The largest increase in prices was recorded in 2009 and 2011 – +**% each year. In 2013 an analogous value amounted to **%. Therefore in 2013 producers' sale prices for biscuits in Russia increased almost two



times in comparison to 2008 and reached **.5 ths. rub/t.

In 2010 due to amendments to All-Russian Classification of Products producers' prices for biscuits have been considered including two more items: sweet biscuits and dry biscuits (hard biscuits and crackers).

Average price for sweet biscuits amounted to *7.4 ths. rub/t in 2013. This value exceeds



price for hard biscuits and crackers by 16.9 ths. rub/t, which were sold at a price of *0,4 ths. rub/t.

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

METHODOLOGY OF RESEARCH

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Population of Russia in 1990, 2000, 2005 and 2008-2013 and forecast for 2014-2016, mln. people

Schedule 2. Dynamics of population of Russia in three different variants of the forecast in 2014-2031, ths. people.

Diagram 1. Structure of population of Russia to working age in 2014- 2031, % (middle variant of the forecast)

Table 1. Population of the largest cities of Russia according to the Census of 2002 and 2010 as for January, 1, 2013, ths. people.

Schedule 3. Dynamics of real household disposable income of population and its annual rate of growth in 2000-2013* and a forecast for 2014-2016, %

Schedule 4. Dynamics of dependency ratio in three variants of the forecast in 2014 – 2031

Schedule 5. Dynamics of employed and unemployed in Russia in 2000 –2013 and forecast until 2014-2015, %

Schedule 6. Dynamics of unemployment share in economically active population by federal districts of RF in 2007-2013, %

Schedule 7. Dynamics of GDP in money terms of 2008 in 2004-2013 and forecast for 2014-2016 bln. rubles

Schedule 8. Dynamics of the GDP of Russia in the current prices in 2004-2013 , and forecast for 2014-2016 , bln rub

Schedule 9. Dynamics of investments into the stock capital of the RF in 2004-2013 and forecast for 2014-2016 , bln. rub

Schedule 10. Dynamics of surplus/deficit of the consolidated budget of the RF in 2006 – 2013 and forecast for 2014-2016, % to GDP

Diagram 2. Change of structure of incomes of the federal budget in 2009-2013, %

Schedule 11. Dynamics of total external debt of RF and its share in GDP in 2010-2014 (as of January, 1) and forecast for 2015-2017 , mln dollars

Diagram 3. Change of structure of external debt of RF in 2009-2014 (as of January 1), %

Schedule 12. Dynamics of CPI in 2006-2013 and forecast for 2014-2016, % to the corresponding period of the previous year

Schedule 13. Dynamics of investments into special economic zones in 2006-2013 (as of 01.10.2013), mln. rub.

Schedule 14. Number of residents of special economic zones in Russia in 2006- 2013 (June 2013) , units

Table 2. Number of small enterprises (without micro enterprises) by the branches in Russia in 2009 – September 2013.

Figure 1. Distribution of volumes of financing of small and medium business support projects from federal and regional budgets by regions on the map of Russia in 2011-2013 , mln. rub

Table 3. Values for 2012-2013 of the countries gained the largest success in the branches studied for the «Doing Business 2014» rating

Table 4. Distribution of Russian regions by the rating of investment climate in 2012-2013 гг.

Schedule 15. Dynamics of volume of cumulative foreign investments in 2005-2013, bln. dollars.

Diagram 4. Foreign investments accumulated by investing countries in 2013, %

Table 5. Dynamics of volume of accumulated foreign investments in TOP-15 of regions in 2005-2013 , mln. dollars

Schedule 16. Dynamics of population of Russia and the world in 2000-2013 and forecast until 2100, mln. people

Schedule 17. Share of RF in the world GDP in 2001-2013 and forecast for 2014-2016, %

2. SUBJECT OF RESEARCH

3. VOLUME OF RUSSIAN FLOUR CONFECTIONERY GOODS MARKET

Schedule 18. Dynamics of flour confectionery goods market volume in 2010-2013, ths.t

Diagram 5. Import share on the Russian flour confectionery market in 2013, %

Diagram 6. Dynamics of import share on the Russian flour confectionery market in 2010-2013, %

Schedule 19. Consumption of flour confectionery per capita in Russia in 2010-2013, kg per capita.

4. SEGMENTATION OF RUSSIAN FLOUR CONFECTIONERY MARKET

Diagram 7. Change of structure of the Russian market of confectionery by categories in 2010-2013*, %

Diagram 8. Change of structure of the Russian market of flour confectionery by shelf-life of products in 2010-2013*, %

Diagram 9. Change of structure of the Russian market of flour confectionery by types in 2010-2013*, %

5. ANALYSIS OF CONFECTIONERY RETAILS IN RUSSIA

Schedule 20. Dynamics of retail sales of confectionery in Russia in 2009-2013, bln. rub.

Schedule 21. Dynamics of retail sales of confectionery in Russia by quarters in 2009-2013, bln. rub.

Table 6. Volumes of retail sales of confectionery by quarters in 2009-March 2013, bln. rub..

Table 7. Volumes of retail sales of confectionery in federal districts of RF in 2009-2013, ths. rub

Diagram 10. Structure of retail sales of confectionery in Russia by federal districts in 2013, %

Diagram 11. Change of structure of retail sales of confectionery in Russia by federal districts in 2009-2013, %

Schedule 22. The largest regions of Russia by retail sales volumes of confectionery in 2013, bln. rub

Table 8. Volumes of retail sales of confectionery by regions of RF in 2009-2013, ths. rub.

Diagram 12. Regional structure of retail sales of confectionery in Russia in 2013, %

Diagram 13. Change of regional structure of retail sales of confectionery in Russia in 2009-2013, %

6. RAW MATERIALS BASE. FLOUR

Schedule 23. Dynamics of volumes of Russian production of flour in 2010-2013, ths. tons

Schedule 24. Dynamics of volumes of Russian production of flour by months in 2010 – February 2014, tons

Table 9. Dynamics of volume of Russian production of flour by months in 2010-February 2014, tons

Table 10. Volumes of production of flour in federal districts of Russia in 2010-2013, tons

Schedule 25. Dynamics of production of flour in federal districts in Russia in 2010-2013, tons

Diagram 14. Change of structure of Russian production of flour by federal districts in 2010-2013, %

Table 10. Volumes of production of flour in regions of RF in 2010-2013, tons

Diagram 15. Change of regional structure of Russian production of flour in 2010-2013, %

Schedule 26. Dynamics of average producers' prices for flour in Russia in 2007-April 2013, rub/t

Table 11. Dynamics of average producers' prices for flour in RF by months in 2007-February 2014, rub/t

Schedule 27. Dynamics of average retail prices for wheat flour in RF in 2009-2013, rub/kg

Table 12. Dynamics of average retail prices for wheat flour by months in 2009-February 2014, rub/kg

7. PRODUCTION OF FLOUR CONFECTIONERY IN RUSSIA

Schedule 28. Dynamics of volume of Russian production of flour confectionery and galletes in 2010-2013, t

Schedule 29 Dynamics of volume of Russian production of flour confectionery by months in 2010-February 2014, t

Table 13 Volume of Russian production of flour confectionery by months in 2010-February 2014, t

Table 14 Volume of Russian production of flour confectionery by federal districts in 2010-February 2014, t

Schedule 30 Dynamics of volume of Russian production of flour confectionery by federal districts in 2010-2013, t

Diagram 16. Change of structure of Russian production of flour confectionery by federal districts in 2010 - 2013, %

Table 15. Volume of Russian production of flour confectionery by regions in 2010 - February 2014, t

Diagram 17. Change of structure of Russian production of flour confectionery by regions in 2010 – 2013, %

8. STRUCTURE OF CONFECTIONERY PRODUCTION

Diagram 18. Structure of Russian production of confectionery by types in 2013*, %

Diagram 19. Change of structure of Russian production of confectionery and hard biscuits by types in 2010 - 2013*, %

Diagram 20. Change of structure of Russian production of confectionery and hard biscuits by types in 2010 – 2013*, %

Diagram 21. Change of structure of Russian production of flour confectionery by shelf life in 2010 - 2013, %

Diagram 22. Change of structure of Russian production of flour confectionery and hard biscuits by types in 2010 – 2013*, %

9. PRODUCTION IN SEPARATE SEGMENTS OF FLOUR CONFECTIONERY

Schedule 31. Dynamics of Russian production of flour confectionery of long shelf life in 2010 – 2013, t

Table 16. Volume of Russian production of flour confectionery of long shelf life by federal districts in 2010 – February 2014, t

Schedule 32. Dynamics of Russian production of flour confectionery of long shelf life by federal districts in 2010 – 2013, t

Diagram 23. Change of the structure of Russian production of long shelf life flour confectionery by federal districts in 2010 - 2013, %

Table 17. Volume of Russian production of long shelf life flour confectionery by regions in 2010-February 2014, t

Schedule 33. Volume of Russian production of long shelf life flour confectionery by the largest regions in 2010 – 2013, t

Diagram 24. Change of structure of Russian long shelf life production by regions in 2010-2013, %

Schedule 34. Dynamics of volume of Russian production of waffles in 2010-2012, t

Table 18. Volume of Russian production of waffles by federal districts in 2010-2012, t

Diagram 25. Change of structure of Russian production of waffles by federal districts in 2010-2012,

Table 19. Volume of Russian production of waffles by regions in 2010-2012, t

Schedule 35. Dynamics of volume of Russian production of sweet biscuits in 2010-2012, t

Table 20. Volume of Russian production of sweet biscuits by federal districts in 2010-2012, t

Diagram 26. Change of structure of Russian production of sweet biscuits by federal districts in 2010-2012, %

Table 21. Volume of Russian production of sweet biscuits by regions in 2010-2012, t

Table 22. Volume of Russian production of ginger biscuits by federal districts in 2010-2012, t

Diagram 27 Change of structure of Russian production of ginger biscuits by federal districts in 2010-2012, %

Schedule 36 Dynamics of volume of Russian production of galletes and crackers in 2010-2012, t

Table 23 Volume of Russian production of galletes and crackers by federal districts in 2010-2012, t

Diagram 28 Change of structure of Russian production of galletes and crackers by federal districts in 2012, %

Table 24 Volume of Russian production of galletes and crackers by regions in 2010-2012, t

Schedule 37 Dynamics of volume of Russian production of muffins in 2010-2012, t

Table 25 Volume of Russian production of muffins by federal districts in 2010-2012, t

Diagram 29 Change of structure of Russian production of muffins by federal districts in 2010-2012, %

Table 26 Volume of Russian production of muffins by regions in 2010-2012, t

Schedule 38 Dynamics of volume of Russian production of rolled cakes in 2010-2012, t

Table 27 Volume of Russian production of rolled cakes by federal districts in 2010-2012, t

Diagram 30 Change of structure of Russian production of rolled cakes by federal districts in 2010-2012, %

Table 28 Volume of Russian production of rolled cakes by regions in 2010-2012, t

Schedule 39 Dynamics of volume of Russian production of pryaniki in 2010-2012, t

Table 29 Volume of Russian production of pryaniki by federal districts in 2010-2012, t

Diagram 31 Change of structure of Russian production of pryaniki by federal districts in 2010-2012, %

Table 30 Volume of Russian production of pryaniki by regions in 2010-2012, t

Schedule 40 Dynamics of volume of Russian production of ginger cakes in 2010-2012, t

Table 31 Volume of Russian production of ginger cakes by federal districts in 2010-2012, t

Diagram 32 Change of structure of Russian production of ginger cakes by federal districts in 2010-2012, %

Table 32 Volume of Russian production of ginger cakes by regions in 2010-2012, t

Schedule 41 Dynamics of volume of Russian production of rum babas in 2010-2012, t

Table 33 Volume of Russian production of rum babas by federal districts in 2010-2012, t

Diagram 33 Change of structure of Russian production of rum babas by federal districts in 2010-2012, %

Table 34 Volume of Russian production of rum babas by regions in 2010-2012, t

Schedule 42 Dynamics of volume of Russian production of flour confectionery of short shelf life in 2010-2013, t

Table 35 Volume of Russian production of flour confectionery of short shelf life by federal districts in 2010-February 2014, t

Schedule 43 Dynamics of Russian production of flour confectionery of short shelf life by federal districts in 2010-2013, t

Diagram 34 Change of structure of Russian production of flour confectionery of short shelf life by federal districts in 2010-2013, %

Table 36 Volume of Russian production of flour confectionery of short shelf life by regions in 2010-February 2014, t

Schedule 44 Dynamics of volume of Russian production of tortes in 2010-2012, t

Table 37 Volume of Russian production of tortes by federal districts in 2010-2012, t

Diagram 35 Change of structure of Russian production of tortes by federal districts in 2010-2012, %

Table 38 Volume of Russian production of tortes by regions in 2010-2012, t

Schedule 45 Dynamics of volume of Russian production of cakes in 2010-2012, t

Table 39 Volume of Russian production of cakes by federal districts in 2010-2012, t

Diagram 36 Change of structure of Russian production of cakes by federal districts in 2010-2012, %

Table 40 Volume of Russian production of cakes by regions in 2010-2012, t

Schedule 46 Dynamics of volume of Russian production of Eastern confectionery in 2010-2012, t

Table 41 Volume of Russian production of Eastern confections by federal districts in 2010-2012, t

Diagram 37. Change of structure of Russian production of Eastern confections by federal districts in 2010-2012, %

Table 42. Volume of Russian production of Eastern confections by regions in 2010-2012, t

10. THE LARGEST RUSSIAN PRODUCERS OF FLOUR CONFECTIONERY

Schedule 47. The largest enterprises with the main type of activity by Russian National Classifier of Economic Activity “Production of dry bread and bakery products and flour confectionery of long shelf life” by proceeds in 2012, mln. rub..

Table 43. Rating of the largest enterprises with the main type of activity by Russian National Classifier of Economic Activity “Production of dry bread and bakery products and flour confectionery of long shelf life” by proceeds in 2007-2012, mln. rub.

Table 44. Rating of the largest enterprises with the main type of activity according to All-Russian Classifier of Types of Economic Activity “Production of dry bread and flour confectionery products” by profitability in 2007-2012, %

Diagram 38. Regional structure of enterprises location with the main type of activity by All-Russian Classifier of Types of Economic Activity “Production of long shelf life dry bread and flour confectionery products” in April, 2014, %

11. ANALYSIS OF FLOUR CONFECTIONERY IMPORT

Schedule 48. Dynamics of volumes of flour confectionery import in 2007-2013, t

Schedule 49. Dynamics of volumes flour confectionery import in 2007-2013, ths. dollars

Schedule 50. Dynamics of volumes of flour confectionery by months in 2009 - March 2014, t

Table 45. Volumes of flour confectionery import by months in 2009-March 2014, t

Schedule 51. Dynamics of volumes of flour confectionery import by months in 2009-March 2014, ths. dollars.

Table 46. Volumes of flour confectionery import by months in 2009-March 2014 , ths. dollars.

Diagram 39. Structure of confectionery import in physical terms in 2013, %

Table 47. Volumes of flour confectionery import by supplying countries in 2007-2013, t

Diagram 40. Structure of flour confectionery import in cost terms in 2013, %

Table 48. Volumes of flour confectionery import by supplying countries in 2007-2013, ths. dollars.

Diagram 41. Structure of flour confectionery import by types in physical terms in 2013, %

Table 49. Flour confectionery import volumes by types in 2007 - 2013, t

Diagram 42. Structure of flour confectionery import by types in cost terms in 2013, %

Table 50. Flour confectionery import volumes by types in 2007-2013, ths. dollars

Schedule 52. Dynamics of import of waffles and wafers in 2007-2013, tons

Schedule 53. Dynamics of import of waffles and wafers in 2007-2013*, ths. dollars

Schedule 54. Dynamics of import of waffles and wafers by months in 2009-March 2014, tons

Table 51. Volumes of import of waffles and wafers by months in 2009-March 2014, tons

Schedule 55. Dynamics of import of waffles and wafers by months in 2007-March 2013, ths. dollars

Table 52. Volumes of import of waffles and wafers by months in 2007-March 2014, ths. dollars

Diagram 43. Structure of import of waffles and wafers in physical terms in 2013, %

Table 53. Volumes of Russian import of waffles and wafers by supplying countries in 2007-2013, tons

Diagram 44. Structure of import of waffles and wafers in cost terms in 2013, %

Table 54. Volumes of Russian import of waffles and wafers by supplying countries in 2007-2013, ths. dollars.

Schedule 56. Dynamics of import of sweet dry biscuits in 2007-2013, tons

Schedule 57. Dynamics of import of sweet dry biscuits in 2007-2013, ths. dollars.

Schedule 58. Dynamics of import of sweet dry biscuits by months in 2009-March 2014, tons

Table 55. Volumes of import of sweet dry biscuits by months in 2009-March 2014, tons

Schedule 59. Dynamics of import of sweet dry biscuits by months in 2009-March 2014, ths. dollars.

Table 56. Volumes of import of sweet dry biscuits by months in 2009-March 2014, ths. dollars.

Diagram 45. Structure of import of sweet dry biscuits in physical terms in 2013, %

Table 57. Volumes of Russian import of sweet biscuits by supplying countries in 2007-2013, tons

Diagram 46. Structure of import of sweet dry biscuits in cost terms in 2013, %

Table 58. Volumes of Russian import of sweet biscuits by supplying countries in 2007-2013, ths. dollars

Schedule 60. Dynamics of import of ginger biscuits and similar products in 2007-2013, tons

Schedule 61. Dynamics of import of ginger biscuits and similar products in 2007-2013, ths. dollars

Schedule 62. Dynamics of import of ginger biscuits and similar products by months in 2009-March 2014, tons

Table 59. Volumes of import of ginger biscuits and similar products by months in 2009-March 2014, tons

Schedule 63. Dynamics of import of ginger biscuits and similar products by months in 2009-March 2014, ths. dollars

Table 60. Volumes of import of ginger biscuits and similar products by months in 2009-March 2014, ths. dollars

Diagram 47. Structure of import of ginger biscuits and similar products in physical terms in 2013, %

Table 61. Volumes of Russian import of ginger biscuits by supplying countries in 2007-2013, tons

Diagram 48. Structure of import of ginger biscuits and similar products in cost terms in 2013, %

Table 62. Volumes of Russian import of ginger biscuits by supplying countries in 2007-2013, ths. dollars.

12. ANALYSIS OF FLOUR CONFECTIONERY EXPORT

Schedule 64. Dynamics of flour confectionery export in 2007-2013, tons

Schedule 65. Dynamics of flour confectionery export in 2007-2013, ths. dollars.

Table 63. Export volumes of flour confectionery by countries of destination in 2007-2013, tons

Table 64. Export volumes of flour confectionery by countries of destination in 2007-2013, ths. dollars.

Diagram 49. Structure of flour confectionery export by types in physical terms in 2013, %

Table 65. Export volumes of flour confectionery by types in 2007-2013, t

Diagram 50. Structure of flour confectionery export by types in cost terms in 2012, %

Table 66. Export volumes of flour confectionery by types in 2007-2013, ths. dollars

Schedule 66. Dynamics of export of waffles and wafers in 2007-2013, t

Schedule 67. Dynamics of export of waffles and wafers in 2007-2013, ths. dollars

Schedule 68. Dynamics of export of waffles and wafers by months in 2009-March 2014, t

Table 67. Export volumes of waffles and wafers by months in 2009-March 2014, t

Table 68. Export volumes of waffles and wafers by months in 2009-March 2014, ths. dollars

Table 69. Volumes of Russian export of waffles by countries of destination in 2007-2013, t

Table 70. Volumes of Russian export of waffles by countries of destination in 2007-2012, ths. dollars.

Schedule 71. Dynamics of export of sweet dry biscuits in 2007-2013, t

Schedule 69. Dynamics of export of sweet dry biscuits in 2007-2013*, ths. dollars.

Schedule 70. Dynamics of export of sweet dry biscuits by months in 2009-March 2014, t

Table 71. Export volumes of sweet dry biscuits by months in 2007-March 2013, t

Schedule 71. Dynamics of export of sweet dry biscuits by months in 2009- March 2014, ths. dollars.

Table 72. Export volumes of sweet dry biscuits by months in 2009-March 2014, ths. dollars

Table 73. Volumes of Russian export of sweet biscuits by countries of destination in 2007-2013, t

Table 74. Volumes of Russian export of sweet biscuits by countries of destination in 2007-2012, ths. dollars

Schedule 72. Dynamics of export of ginger biscuits and similar products in 2007-2013, t

Schedule 73. Dynamics of export of ginger biscuits and similar products in 2007-2013, ths. dollars.

Schedule 74. Dynamics of export of ginger biscuits and similar products by months in 2009-March 2014, t

Table 75. Export volumes of ginger biscuits and similar products by months in 2009-March 2014, t

Schedule 75. Dynamics of export of ginger biscuits and similar products by months in 2009-March 2014, ths. dollars

Table 76. Export volumes of ginger biscuits and similar products by months in 2009-March 2013, ths. dollars

Table 77. Volumes of Russian export of ginger biscuits by countries of destination in 2007-2013, t

Table 78. Volumes of Russian export of ginger biscuits by countries of destination in 2007-2013, ths. dollar

13. PRODUCERS' PRICES FOR FLOUR CONFECTIONERY

Schedule 76. Dynamics of average producers' prices for tortes and cakes in Russia by years in 2008-2013, rub/t

Schedule 77. Dynamics of average producers' prices for tortes and cakes in Russia by months in 2008-February 2014, rub/t

Table 79. Average producers' prices for tortes and cakes in Russia by months in 2008-February 2014, rub/t

Schedule 78. Dynamics of average producers' prices for waffles in Russia by years in 2008-2013, rub/t

Schedule 79. Dynamics of average producers' prices for waffles in Russia by months in 2008-February 2014, rub/t

Table 80. Average producers' prices for waffles in Russia by months in 2008-February 2014, rub/t

Schedule 80. Dynamics of average producers' prices for biscuits in Russia by years in 2008-2013, rub/t

Schedule 81. Dynamics of average producers' prices for biscuits in Russia by months in 2008-February 2014, rub/t

Table 81. Average producers' prices for biscuits in Russia by months in 2008-February 2014, rub/t

Schedule 82. Average producers' prices for sweet biscuits and galletes, crackers in Russia by years in 2010-2013, rub/t

Schedule 83. Dynamics of average producers' prices for pryaniki and ginger cakes by years in Russia in 2008-2013, rub/t

Schedule 84. Dynamics of average producers' prices for pryaniki and ginger cakes in Russia by months in 2008-February 2014, rub/t

Table 82. Average producers' prices for pryaniki and ginger cakes in Russia by months in 2008-February 2014, rub/t

14. RETAIL PRICES FOR FLOUR CONFECTIONERY IN RUSSIA

Schedule 85. Dynamics of average retail prices for biscuits in Russia by years in 2008-2013, rub/kg

Schedule 86. Dynamics of average retail prices for biscuits in Russia by months in 2008-February 2014, rub/kg

Table 83. Average retail prices for biscuits in Russia by months in 2008-February 2014, rub/kg

Schedule 87. Dynamics of average retail prices for pryaniki in Russia by years in 2008-2013, rub/kg

Schedule 88. Dynamics of average retail prices for pryaniki in Russia by months in 2008-February 2014, rub/kg

Table 84. Average retail prices for pryaniki in Russia by months in 2008-February 2014, rub/kg

Schedule 89. Dynamics of average retail prices for muffins and rolled cakes in Russia by years in 2008-2013, rub/kg

Schedule 90. Dynamics of average retail prices for muffins and rolled cakes in Russia by months in 2008-February 2014, rub/kg

Table 85. Average retail prices for muffins and rolled cakes in Russia by months in 2008-February 2014, rub/kg

Schedule 91. Dynamics of average retail prices for tortes in Russia by years in 2008-2013, rub/kg

Schedule 92. Dynamics of average retail prices for tortes in Russia by months in 2008-February 2014, rub/kg

Table 86. Average retail prices for tortes in Russia by months in 2007-February 2014, rub/kg r

15. TRENDS ON THE RUSSIAN FLOUR CONFECTIONERY MARKET

16. DISTRIBUTION CHANNELS ON THE MARKET OF CONFECTIONERY

17. STATE REGULATIONS OF FLOUR CONFECTIONERY MARKET

18. CONSUMER PREFERENCES ON FLOUR CONFECTIONERY GOODS MARKET

Schedule 93. Small piece confectionery products consumption volume in Moscow in 2013 (N=348), people

Diagram 51. Lump-sum expenses for small piece confectionery products in 2013, %

Diagram 60. Consumption of different types of Eastern sweets by groups of population in 2013 году, % from number of respondents

19. PROFILES OF THE LARGEST ENTERPRISES BY CONFECTIONERY GOODS

Table 89. Shareholders of «KDV Yashkino» LLC

Table 90. Subsidiaries of «KDV Yashkino» LLC

Table 91. Production volumes of «KDV Yashkino» LLC

Table 92. Balance sheet of «KDV Yashkino» LLC, ths rubles

- Table 93. Profit and loss statement of «KDV Yashkino» LLC, ths rubles
- Table 94. Cash-flow statement of «KDV Yashkino» LLC, ths rubles
- Table 95. Financials of «KDV Yashkino» LLC
- Table 96. Shareholders of “AKKOND” OJSC
- Table 97. Subsidiaries of “AKKOND” OJSC
- Table 98. Production volumes of “AKKOND” OJSC
- Table 99. Balance sheet of «AKKOND », OJSC, ths. rub
- Table 100. Profit and loss statement of «AKKOND», OJSC, ths. rub
- Table 101. Cash flow statement of «AKKOND», OJSC, ths. rub
- Table 102. Financials of «AKKOND»
- Table 103. Share holders/founders of “KONTI-RUS” CJSC
- Table 104. Subsidiaries of “KONTI-RUS” CJSC
- Table 105. Production volumes of “KONTI-RUS”, CJSC ths. rub
- Table 106. Balance sheet of “KONTI-RUS”, CJSC ths. rub
- Table 107. Profit and loss statement of “KONTI-RUS”, CJSC ths. rub
- Table 108. Cash flow statement of “KONTI-RUS”, CJSC , ths. rub
- Table 109. Financials of “KONTI-RUS”, CJSC
- Table 110. Shareholders/founders of «Chipita Saint Petersburg» LLC
- Table 111. Subsidiaries of «Chipita Saint Petersburg» LLC
- Table 112. Production volumes of «Chipita Saint Petersburg» LLC
- Table 113. Balance sheet «Chipita Saint Petersburg» LLC, ths rubles
- Table 114. Profit and loss statement «Chipita Saint Petersburg» LLC, ths rubles
- Table 115. Cash-flow statement «Chipita Saint Petersburg» LLC, ths rubles
- Table 116. Financials of «Chipita Saint Petersburg» LLC
- Table 117. Shareholders of “FILI-BAKER”, LLC
- Table 118. Balance sheet of «FILI-BACKER», ths. rub
- Table 119. Profit and loss statement of «FILI-BACKER», LLC, ths. rub
- Table 120. Financials of «FILI-BACKER», LLC

20. FORECAST OF THE MARKET OF FLOUR CONFECTIONERY DEVELOPMENT FOR 2014-2016

- Schedule 94. Dynamics of volume of the Russian market of flour confectionery in 2010-2013 and forecast for 2014-2016, ths. t
- Schedule 95. Dynamics of import share on the Russian market of flour confectionery in 2010-2016*, %

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.

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**

E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

Tel.: +7 (495) 212-91-91