



**Intesco
Research
Group**

BREAD AND BAKERY PRODUCTS. RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS



MOSCOW 2012

CONTENTS

CONTENTS	3
METHODOLOGY OF RESEARCH	10
EXTRACTS FROM RESEARCH	12
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	15
ABOUT INTESCO RESEARCH GROUP COMPANY	30

CONTENTS

METHODOLOGY OF RESEARCH

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Dynamics of population

The largest cities

Social standards of living

Economic activity

1.2. Economic situation

Dynamics of economic development

Stability of the state budget

1.3. Situation of Russia in the world

Share of RF in the population of the world

2. CLASSIFICATION ON THE MARKET OF BREAD AND BAKERY PRODUCTS

2.1. Methods of classification of bread and bakery products

Classification of bread and bakery products by CN FEA

Classification of bread and bakery products by ARCP

Classification of bread and bakery products by ARCPEA

2.2. Rye bread

2.3. Bread made from wheat flour

2.4. Bakery products

2.5. Fancy bun goods

2.6. Dietary bakery

3. VOLUME OF RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

3.1. Dynamics of market volume of bread and bakery products by years

3.2. Import share on Russian market of bread and bakery products

3.3. Dynamics of import share on the market of bread and bakery products

3.4. Segmentation of the market of bread and bakery products by groups

3.5. Per capita consumption of bread and bakery products

4. ANALYSIS OF RETAILING OF BREAD AND BAKERY PRODUCTS

4.1. Dynamics of retail sales by years

4.2. Dynamics of retail sales by quarters

4.3. Structure of retail sales by federal districts of RF

4.4. The largest regions of RF by retail sales

4.5. Regional structure of retail sales

5. TRENDS ON RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

6. THE LARGEST PLAYERS ON THE MARKET OF BREAD AND BAKERY PRODUCTS

6.1. «Khlebniy dom» JSC

6.2. «Sibirskiy agrarniy holding» (SAHO)

6.3. «Stoylenskaya niva»

7. STATE REGULATION ON THE MARKET OF BREAD AND BAKERY PRODUCTS

8. RAW MATERIALS BASE FOR PRODUCTION OF BREAD AND BAKERY PRODUCTS

8.1. Flour

Dynamics of volumes of flour production by months

Dynamics of volumes of flour production by years

Volumes of flour production in federal districts of RF

Structure of flour production by federal districts of RF

Volumes of flour production in regions of RF

Regional structure of flour production

8.2. Yeast for bakery

Production volumes of yeast for bakery by years

Production volumes of yeast for bakery by months

Dynamics of production of yeast for bakery in federal districts of RF

Structure of production of yeast for bakery by federal districts of RF

Dynamics of production of yeast for bakery in regions of RF

Regional structure of yeast for bakery production

9. PRODUCTION OF BREAD AND BAKERY PRODUCTS

9.1. Production volumes of bread and bakery products by years

9.2. Production volumes of bread and bakery products by months

9.3. Dynamics of production of bread and bakery products in federal districts of RF

9.4. Structure of production of bread and bakery products by federal districts of RF

9.5. Dynamics of production of bread and bakery products in regions of RF

9.6. Regional structure of bread and bakery products production

10. STRUCTURE OF PRODUCTION OF BREAD AND BAKERY PRODUCTS

10.1. Segmentation of production of bread and bakery products by groups

10.2. Segmentation of production of bread and bakery products by types

11. PRODUCTION IN SEPARATE SEGMENTS OF BREAD AND BAKERY PRODUCTS

11.1. Bakery products of short-term storage

Bakery products of wheat flour

Bakery products of rye flour

Bakery products of wheat and rye flour mixture

Dietary bakery

Fancybakery products

Pasties, pies and doughnuts

11.2. Bakery products of long-term storage

Packed bakery products

Bakery products of low humidity

Ring-shaped bakery products

Rusk, toasted bread products

Semi-finished bakery products

12. THE LARGEST PRODUCERS OF BREAD AND BAKERY PRODUCTS

12.1. Bread and bakery products (in general)

Production volumes of the largest Russian enterprises

Structure of production by the largest enterprises

12.2. Wheat flour bread of the highest-grade flour

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.3. Wheat flour bread of the 1 grade flour

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.4. Wheat flour bread of the 2 grade flour

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.5. Rye bread

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.6. Diet bread and bakery products

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.7. Fancy bakery products

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.8. Ring-shaped bakery products

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.9. Bakery products of wheat of the highest grade flour

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.10. Bakery products of wheat of the 1 grade flour

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.11. Pasties, pies and doughnuts

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.12. Ruska, toasts and crispbread

Production volumes of the largest enterprises

Structure of production by the largest enterprises

12.13. Enterprises of bread and bakery industry by the main type of activity

Bread and bakery confectionery goods of long-term storage

Bread and bakery confectionery goods of short-term storage

13. ANALYSIS OF EXPORT OF BREAD AND BAKERY PRODUCTS

13.1. Bakery products (in general)

Dynamics of export volume by years

Dynamics of export volume by months

Structure of export by types of bread and bakery products

13.2. Rusks, toasts and similar roasted products

Dynamics of export volume by years

Structure of export by countries of destination in physical terms

Structure of export by countries of destination in cost terms

13.3. Crispbreads

Dynamics of export volume by years

Structure of export by countries of destination in physical terms

Structure of export by countries of destination in cost terms

14. ANALYSIS OF IMPORT OF BREAD AND BAKERY PRODUCTS

14.1. Bakery products (in general)

Dynamics of import volume by years

Dynamics of import volume by months

Structure of import by types of bread and bakery products

14.2. Rusks, toasts and similar roasted products

Dynamics of import volume by years

Structure of import by supplying countries in physical terms

Structure of import by supplying countries in cost terms

14.3. Crispbreads

Dynamics of import volume by years

Structure of import by supplying countries in physical terms

Structure of import by supplying countries in cost terms

15. PRODUCER PRICES FOR BREAD AND BREAD AND BAKERY PRODUCTS

15.1. Wheat flour bread of the highest-grade flour

Dynamics of average producer prices by years

Dynamics of average producer prices for wheat flour bread of the highest-grade flour by months

15.2. Wheat flour bread of the 1 grade flour

Dynamics of average producer prices for wheat flour bread of the 1 grade flour by years

Dynamics of average producer prices for wheat flour bread of the 1 grade flour by months

15.3. Rye bread

Dynamics of average producer prices for rye bread by years

Dynamics of average producer prices for rye bread by months

15.4. Fancybakery products

Dynamics of average producer prices for fancy bakery products by years

Dynamics of average producer prices for fancy bakery products by months

15.5. Crispbreads

Dynamics of average producer prices by years

Dynamics of average producer prices by months

15.6. Ring-shaped bakery products

Dynamics of average producer prices for ring-shaped bakery products by months

15.7. Rusk products

Dynamics of average producer prices by months

16. RETAIL PRICES FOR BREAD AND BAKERY PRODUCTS

16.1. Bread and bakery products of the highest grade wheat flour

Dynamics of average retail prices for bread and bakery products of the highest grade wheat flour by years

Dynamics of average retail prices for bread and bakery products of the highest grade wheat flour by months

16.2. Bread and bakery products of wheat flour of 1 and 2 grade

Dynamics of average retail prices for bread and bakery products of the 1 and 2 grade wheat flour by years

Dynamics of average retail prices for bread and bakery products of the 1 and 2 grade wheat flour by months

16.3. Mixed wheat-rye bread

Dynamics of average retail prices for mixed wheat-rye bread by years

Dynamics of average retail prices for mixed wheat-rye bread by months

16.4. Ring-shaped bakery products

Dynamics of average retail prices for ring-shaped bakery products, by years

Dynamics of average retail prices for ring-shaped bakery products by months

16.5. Fancy bun goods of the highest-grade flour (single-piece)

Dynamics of average retail prices for fancy bun goods of the highest-grade flour (single-piece), by years

Dynamics of average retail prices for fancy bun goods of the highest-grade flour (single-piece) by months

16.6. Breakfast cereals (flocks of cereals)

Dynamics of average retail prices for breakfast cereals (flocks of cereals) by years

Dynamics of average retail prices for breakfast cereals (flocks of cereals) by months

17. STRUCTURE OF RETAIL PRICES FOR BREAD

17.1. Bread of the highest grade wheat flour

17.2. Bread of the 1 and 2 grade wheat flour

17.3. Bread of rye and rye-wheat flour

18. FACTORS INFLUENCING THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

19. CONSUMER PREFERENCES ON THE MARKET OF BREAD AND BAKERY PRODUCTS

20. PROFILES OF THE LARGEST ENTERPRISES OF BREAD AND BAKERY PRODUCTS PRODUCTION

20.1. «KHLEBNIY DOM» JSC

Reference information

Activities

Production volumes

Balance sheet

Profit and loss statement

Cash-flow statement

Financials

20.2. «KARAVAY» JSC

*Reference information**Activities**Production volumes**Balance sheet**Profit and loss statement**Cash-flow statement**Financials*

20.3. «LIPETSKHLEBMAKARONPROM» JSC

*Reference information**Activities**Production volumes**Balance sheet**Profit and loss statement**Cash-flow statement**Financials*

20.4. «KHLEBOZAVOD №22» JSC

*Reference information**Activities**Production volumes**Balance sheet**Profit and loss statement**Cash-flow statement**Financials*

20.5. «PERVIY KHLEBOKOMBINAT» JSC

*Reference information**Activities**Production volumes**Balance sheet**Profit and loss statement**Cash-flow statement**Financials***21. FORECAST OF THE MARKET OF BREAD AND BAKERY PRODUCTS DEVELOPMENT FOR 2011-2014****ABOUT INTESCO RESEARCH GROUP COMPANY**

METHODOLOGY OF RESEARCH

Subject of research:

MARKET OF BREAD AND BAKERY PRODUCTS

Goal of research:

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2011-2014

Regions of research:

RUSSIA

AND REGIONS OF RF

Main blocks of research:

VOLUME OF THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

ANALYSIS OF RETAILING OF BREAD AND BAKERY PRODUCTS

TRENDS ON RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

STATE REGULATION ON THE MARKET OF BREAD AND BAKERY PRODUCTS

THE LARGEST PLAYERS ON THE MARKET OF BREAD AND BAKERY PRODUCTS

PRODUCTION OF BREAD AND BAKERY PRODUCTS

STRUCTURE OF PRODUCTION OF BREAD AND BAKERY PRODUCTS

THE LARGEST PRODUCERS OF BREAD AND BAKERY PRODUCTS

ANALYSIS OF EXPORT OF BREAD AND BAKERY PRODUCTS

ANALYSIS OF IMPORT OF BREAD AND BAKERY PRODUCTS

PRODUCER PRICES FOR BREAD AND BAKERY PRODUCTS

RETAIL PRICES FOR BREAD AND BAKERY PRODUCTS

FACTORS INFLUENCING THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

STRUCTURE OF RETAIL PRICES FOR BREAD

FORECAST OF DEVELOPMENT OF THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS FOR 2010-2014

The market is segmented:

By types of bread and bakery products

By groups of bread and bakery products

Largest Russian companies with profiles:

«KHLEBNIY DOM» JSC

«KARAVAY» JSC

«LIPETSKHLEBMAKARONPROM» JSC

« KHLEBOZAVOD № 22» JSC

«PERVIY KHLEBOKOMBINAT» JSC

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

Information sources used:

Federal State Statistics Service

Economic Development Ministry

Federal Customs Service

Federal Tax Service

Field expert evaluations

Materials of the field's main players

Field print and electronic publications

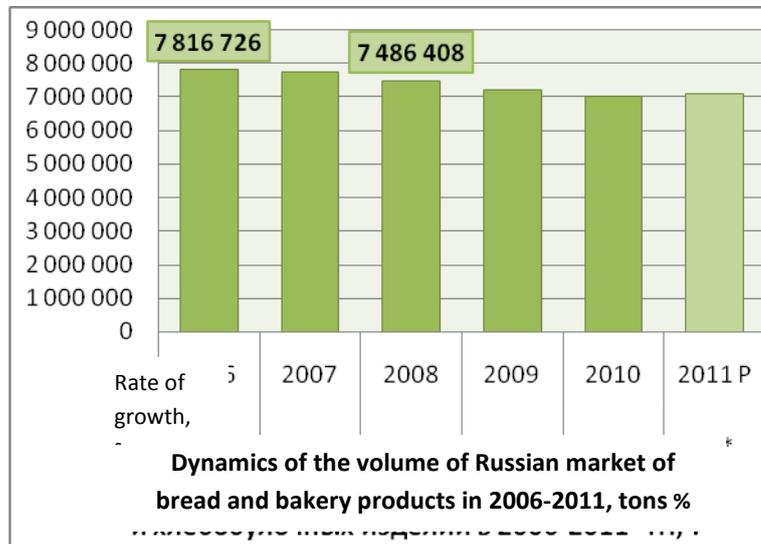
The research contains 98 schedules, 78 diagrams, 117 tables and 3 schemes.

EXTRACTS FROM RESEARCH

CHAPTER 3

VOLUME OF THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

In recent years the trend to decrease of the volume of the Russian market of bread and bakery products was recorded. In 2010 the market volume decreased to 7 mln tons. However, according to experts of Intesco Research Group, in 2011 parameters of the market will show a positive dynamics, will increase about 1% compared to 2010. As for 2010 the share of the products of long-term storage amounted to **%, and the supply of products of short-term storage formed **% of the



market. In 2011 the **% increase of the products of long-term storage share is expected **%. The growth was provided by the appearance of new products on the market (snacks, cakes of long-term storage) and active growth of frozen products segment.

Segmentation of the Russian market of bread and bakery products by groups in physical terms in 2009-2011. %

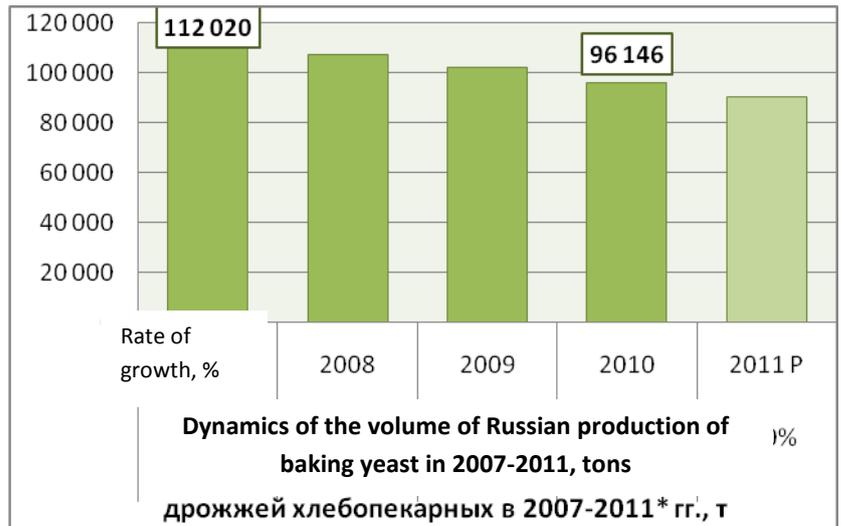
CHAPTER 8

RAW MATERIAL BASE FOR BREAD AND BAKERY PRODUCTS PRODUCTION

In recent years production volume of bread-baking yeast has had the trend to decrease. In 2009 Russia produced ** ths tons of products, that is 5,3 ths tons less than in the previous year. In 2010 production decreased also by 5,7%.

In 2011 the decrease of production volumes to ** ths tons is expected.

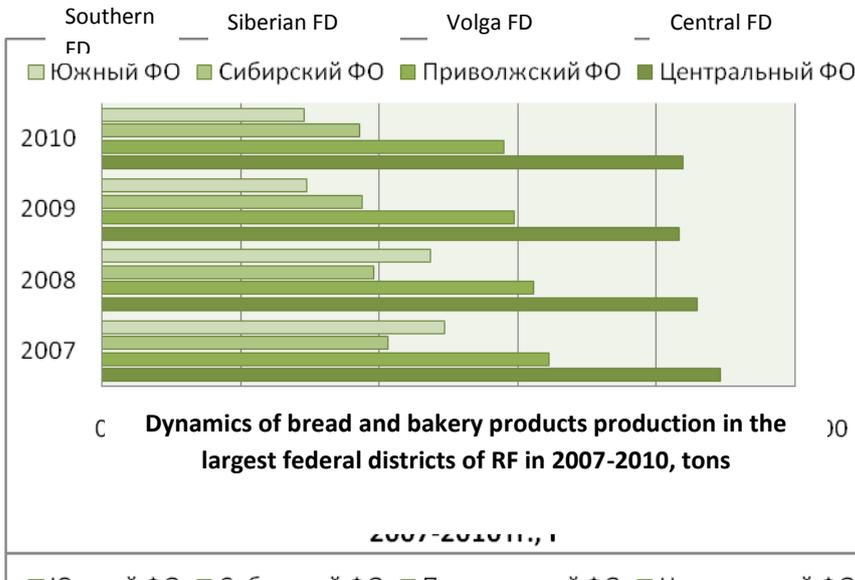
In January 2010 production volume of bread-baking yeast was equal *** tons, after a year this parameter increased by 195 tons and amounted *** tons.



If we talk about parameters of the last month, then in September 2011 volume of production output amounted ***tons, that is 11% less than in the same month of 2010.

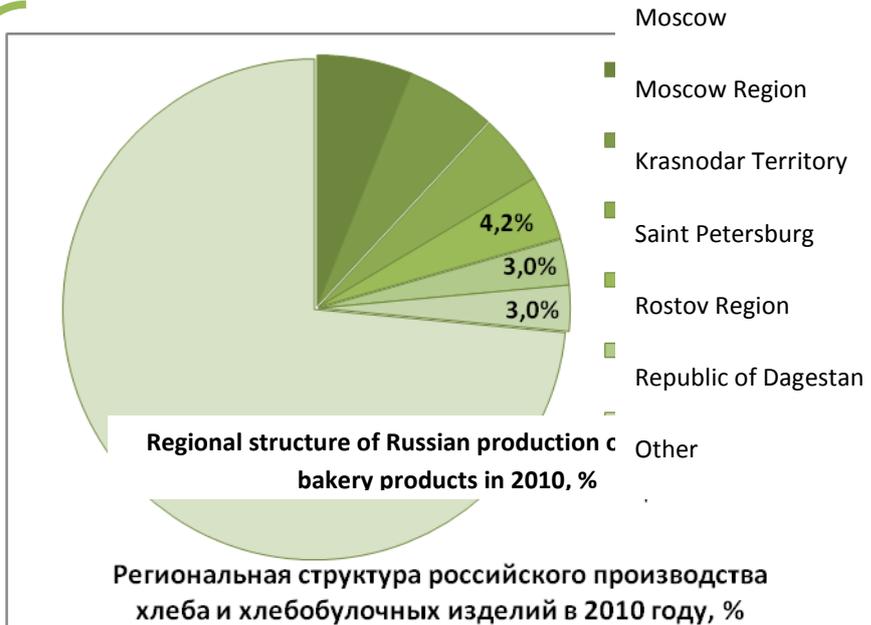
CHAPTER 9

PRODUCTION OF BREAD AND BAKERY PRODUCTS



During 4 years production of bakery products in Central FD decreased by 134,9 ths tons, in Volga FD – by 164,5 ths tons. Production output of these products decreased most of all in Southern FD – by 506,8 ths tons.

More than a quarter of Russian bread and bakery products production was concentrate in 6 regions. The largest of them is Moscow, its share in 2010 amounted to 42%. Rate of growth amounted to 0,2%. Moscow Region produced 5% of products, Krasnodar Territory – 4,2%. 4,2% were produced on the territory of Saint Petersburg. Shares of Rostov Region and Republic of Dagestan had 1,2% less – 3% each region in the regional structure.



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. Dynamics of resident population number of Russia in 2000, 2005, 2010 and forecast for 2015 and 2020, ths people

Schedule 2. Dynamics of actual household disposable income in Russia in 2000-2010, %

Schedule 3. Dynamics of number of employed and unemployed people in RF in 2006-2010, ths people

Schedule 4. Dynamics of share of the unemployed in economically active population by FD of RF in 2006-2010, %

Schedule 5. Dynamics of GDP in prices of 2003 in 2002-2010, billion dollars

Schedule 6. Investments into the fixed capital of RF in 2001-2010

Schedule 7. Surplus/deficit of consolidated budget of RF in 2006-2010, %

Schedule 8. Dynamics of total external debt of RF 2001-2010

Schedule 9. Consumer prices index in RF 2001-2010, %

Schedule 10. Share of RF in the population of the world in 2000-2010 and forecast until 2100

Schedule 11. Share of RF in the world GDP in 2000-2010 and forecast for 2011-2016, %

2. CLASSIFICATION ON THE MARKET OF BREAD AND BAKERY PRODUCTS

Scheme 1. Classification of bread and bakery products depending on the type of the flour

Scheme 2. Classification of bread and bakery products depending on the type of the recipe

Scheme 3. Classification of bread and bakery products depending on the type of the way of baking

Table 2. Range of products of bread of wheat flour

Table 3. Range of products of bakery products

3. VOLUME OF RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

Schedule 12. Dynamics of volume of the Russian market of bread and bakery products in 2006-2011, tons

Diagram 1. Import share on Russian market of bread and bakery products in physical terms in 2010, %

Diagram 2. Dynamics of import share on the Russian market of bread and bakery products in physical terms in 2006-2010, %

Diagram 3. Segmentation of the Russian market of bread and bakery products by groups in physical terms in 2009-2011*, %

Schedule 13. Per capita consumption of bread and bakery products in Russia in 2006-2011, kg/person

4. ANALYSIS OF RETAILING OF BREAD AND BAKERY PRODUCTS

Schedule 14. Dynamics of retail sales of bread and bakery products in Russia in 2006-2010, mln rubles

Schedule 15. Dynamics of retail sales of bread and bakery products by quarters in 2008-2010, billion rubles

Table 4. Volumes of retail sales of bread and bakery products in federal districts of RF in 2009-2011, ths rubles

Diagram 4. Structure of retail sales of bread and bakery products by federal districts of RF in cost terms in 2010, %

Schedule 16. The largest regions of RF by volumes of retail sales of bread and bakery products in 2010, billion rubles

Table 5. Volumes of retail sales of bread and bakery products in regions of RF in 2009-2011, ths rubles

Diagram 5. Change of regional structure of retail sales of bread and bakery products in RF in cost terms in 2009-2010, %

5. TRENDS ON RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

Diagram 6. Share of packed dry bakery products on the Russian market in 2007-2009, %

6. THE LARGEST PLAYERS ON THE MARKET OF BREAD AND BAKERY PRODUCTS

7. STATE REGULATION ON THE MARKET OF BREAD AND BAKERY PRODUCTS

8. RAW MATERIALS BASE FOR PRODUCTION OF BREAD AND BAKERY PRODUCTS

Schedule 17. Dynamics of volume of Russian flour production in 2007-2011, tons

Schedule 18. Dynamics of volume of Russian flour production by years in 2009-2011, tons

Table 6. Volumes of flour production in federal districts of RF in 2007-2010, tons

Schedule 19. Dynamics of flour production in federal districts of RF in 2007-2010, tons

Diagram 7. Structure of flour production by federal districts of RF in 2010, %

Table 7. Volumes of flour production in regions of RF in 2007-2010, tons

Schedule 20. The largest regions of RF by flour production in 2010, tons

Diagram 8. . Regional structure of Russian flour production in 2010, %

Schedule 21. Dynamics of volume of Russian yeast for bakery production in 2007-2011*, tons

Schedule 22. Dynamics of volume of Russian yeast for bakery production by months in 2009-2011, tons

Table 8. Production volumes of yeast for bakery in federal districts of RF in 2007-2010, tons

Schedule 23. Dynamics of yeast for bakery production in the largest federal districts of RF in 2007-2010, tons

Diagram 9. Structure of Russian yeast for bakery production by federal districts in 2010, %

Diagram 10. Change of structure of Russian yeast for bakery production by federal districts in 2007-2010, %

Table 9. Production volumes of yeast for bakery in regions of RF in 2007-2010, tons

Schedule 24. Dynamics of yeast for bakery production in the main regions of RF in 2007-2010, tons

Diagram 11. Regional structure of Russian yeast for bakery production in 2010, %

Diagram 12. Change of regional structure of Russian yeast for bakery production in 2007-2010, %

9. PRODUCTION OF BREAD AND BAKERY PRODUCTS

Schedule 25. Dynamics of volume of Russian bread and bakery products production in 2007-2011*, tons

Schedule 26. Dynamics of volume of Russian bread and bakery products production by months in 2009-2011, tons

Table 10. Production volumes of bread and bakery products in federal districts of RF in 2007-2010, tons

Schedule 27. Dynamics of production of bread and bakery products in the largest federal districts of RF in 2007-2010, tons

Diagram 13. Structure of production of bread and bakery products by federal districts of RF in 2007-2010, %

Table 11. Production volumes of bread and bakery products in regions of RF in 2007-2010, tons

Schedule 28. Dynamics of production of bread and bakery products in the main regions of RF in 2007-2010, tons

Diagram 14. Regional structure of Russian production of bread and bakery products in 2007-2010, %

10. STRUCTURE OF PRODUCTION OF BREAD AND BAKERY PRODUCTS

Diagram 15. Structure of Russian production of bread and bakery products by groups in physical terms in 2009-2010, %

Diagram 16. Structure of Russian production of bread and bakery products by types in physical terms in 2010, %

11. PRODUCTION IN SEPARATE SEGMENTS OF BREAD AND BAKERY PRODUCTS

Schedule 29. Dynamics of volume of Russian bread and bakery products of long-term storage production in 2009-2011*, tons

Schedule 30. Dynamics of volume of Russian bread and bakery products of long-term storage production by months in 2009-2011, tons

Table 12. Production volumes of bakery products of long-term storage by federal districts of RF in 2009-2010, tons

Diagram 17. Change of structure of Russian bread and bakery products of long-term storage by federal districts in 2009-2010, %

Table 13. Production volumes of bakery products of long-term storage by regions of RF in 2009-2010, tons

Diagram 18. Change of regional structure of Russian bread and bakery products of long-term storage in 2009-2010, %

Diagram 19. Structure of Russian production of bread and bakery products of wheat flour by types in 2010, %

Table 14. Production volumes of bread and bakery products of wheat flour by types in 2010, tons

Diagram 20. Structure of Russian production of bread and bakery products of wheat flour by the package in 2010, %

Table 15. Production volumes of bread and bakery products of wheat flour by federal districts of RF in 2010, tons

Diagram 21. Structure of Russian production of bread and bakery products of wheat flour by federal districts in 2010, %

Table 16. Production volumes of bread and bakery products of wheat flour by regions of RF in 2010, tons

Diagram 22. Regional structure of Russian production of bread and bakery products of wheat flour in 2010, %

Table 17. Production volumes of bread and bakery products of rye flour by federal districts of RF in 2010, tons

Diagram 23. Structure of Russian production of bread and bakery products of rye flour by federal districts in 2010, %

Table 18. Production volumes of bread and bakery products of rye flour by regions of RF in 2010, tons

Diagram 24. Regional structure of Russian production of bread and bakery products of rye flour in 2010, %

Table 19. Production volumes of bread made of wheat flour of the 2 grade by federal districts of RF in 2010, tons

Diagram 25. Structure of Russian production of bread and bakery products of wheat and rye flour mixture by federal districts in 2010, %

Table 20. Production volumes of bread and bakery products of wheat and rye flour mixture by regions of RF in 2010, tons

Diagram 26. Regional structure of Russian production of bread and bakery products of wheat and rye flour mixture in 2010, %

Diagram 27. Structure of Russian diet bread and bakery products production by types in 2010, %

Table 21. Production volumes of diet bakery products by types in 2010, tons

Schedule 31. Dynamics of volume of Russian diet bread and bakery products production in 2007-2010, tons

Table 22. Production volumes of diet bakery products by federal districts of RF in 2007-2010, tons

Diagram 28. Change of structure of Russian diet bread and bakery products production by federal districts in 2007-2010, %

Table 23. Production volumes of diet bakery products by regional of RF in 2007-2010, tons

Diagram 29. Regional structure of Russian diet bread and bakery products production in 2010, %

Diagram 30. Structure of Russian production of fancy bakery products by types in 2010, %

Table 24. Production volumes of fancy bakery products by federal districts of RF in 2010, tons

Diagram 31. Structure of Russian production of fancy bakery products by federal districts in 2010, %

Table 25. Production volumes of fancy bakery products by regions of RF in 2010, tons

Diagram 32. Regional structure of Russian production of fancy bakery products in 2010, %

Table 26. Production volumes of pasties, pies and doughnuts by federal districts of RF in 2010, tons

Diagram 33. Structure of Russian production of pasties, pies and doughnuts by federal districts in 2010, %

Table 27. Production volumes of pasties, pies and doughnuts by regional of RF in 2010, tons

Diagram 34. Regional structure of Russian production of pasties, pies and doughnuts in 2010, %

Schedule 32. Dynamics of volume of Russian bread and bakery products of long-term storage production in 2009-2011*, tons

Schedule 33. Dynamics of volume of Russian bread and bakery products of long-term storage production by months in 2009-2011, tons

Table 28. Production volumes of bakery products of long-term storage by federal districts of RF in 2009-2010, tons

Diagram 35. Change of structure of Russian bread and bakery products of long-term storage production by federal districts in 2009-2010, %

Table 29. Production volumes of bakery products of long-term storage by regions of RF in 2009-2010, tons

Diagram 36. Change of regional structure of Russian bread and bakery products of long-term storage production in 2009-2010, %

Diagram 37. Structure of Russian packed bread and bakery products of long-term storage production by types in 2010, %

Schedule 34. Dynamics of volume of Russian packed bread and bakery products of long-term storage production in 2009-2010, tons

Table 30. Production volumes of packed bakery products of long-term storage by federal districts of RF in 2009-2010, tons

Diagram 38. Structure of Russian packed bread and bakery products of long-term storage production by federal districts in 2009-2010, %

Table 31. Production volumes of packed bakery products of long-term storage by regions of RF in 2009-2010, tons

Diagram 39. Change of regional structure of Russian packed bread and bakery products of long-term storage production in 2009-2010, %

Diagram 40. Structure of Russian bread and bakery products of low humidity production by types in 2010, %

Table 32. Production volumes of bakery products of low humidity by types in 2010, tons

Schedule 35. Dynamics of volume of Russian bread and bakery products of low humidity production in 2009-2010, tons

Table 33. Production volumes of bakery products of low humidity by federal districts of RF in 2009-2010, tons

Diagram 41. Change of structure of Russian bread and bakery products of low humidity production by federal districts in 2009-2010, %

Table 34. Production volumes of bakery products of low humidity by regions of RF in 2009-2010, tons

Diagram 42. Change of regional structure of Russian bread and bakery products of low humidity production in 2009-2010, %

Table 35. Production volumes of ring-shaped products by federal districts of RF in 2010, tons

Diagram 43. Structure of Russian production of ring-shaped products by federal districts in 2010, %

Table 36. Production volumes of ring-shaped products by regions of RF in 2010, tons

Diagram 44. Regional structure of Russian production of ring-shaped products in 2010, %

Table 37. Production volumes of rusk products and toasts by federal districts of RF in 2010, tons

Diagram 45. Structure of Russian production of rusk products, toasts by federal districts in 2010, %

Table 38. Production volumes of rusk products and toasts by regions of RF in 2010, tons

Diagram 46. Regional structure Russian production of rusk products, toasts in 2010, %

Schedule 36. Dynamics of volume of Russian bread and bakery semi-finished products in 2009-2010, tons

Table 39. Production volumes of bread and bakery semi-finished products by federal districts of RF in 2009-2010, tons

Diagram 47. Change of structure of Russian bread and bakery semi-finished products by federal districts in 2009-2010, %

Table 40. Production volumes of bread and bakery semi-finished products by regional of RF in 2009-2010, tons

Diagram 48. Change of regional structure of Russian bread and bakery semi-finished products in 2009-2010, %

12. THE LARGEST PRODUCERS OF BREAD AND BAKERY PRODUCTS

Table 41. Production volumes of bread and bakery products by the largest Russian producers in 2006-2008, tons

Schedule 37. Production volumes of the largest Russian enterprises by the output of bread and bakery products in 2008, tons

Diagram 49. Structure of Russian production of bread and bakery products by the largest enterprises in 2008, %

Table 42. Production volumes of wheat bread of the highest-grade flour by the largest Russian producers in 2006-2008, tons

Schedule 38. Production volumes of the largest Russian enterprises by the output of wheat bread and bakery products of the highest-grade flour in 2008, tons

Diagram 50. Structure of Russian production of wheat bread of the highest-grade flour by the largest enterprises in 2008, %

Table 43. Production volumes of wheat bread of the 1 grade flour by the largest Russian producers in 2006-2008, tons

Schedule 39. Production volumes of the largest Russian enterprises by the output of wheat bread and bakery products of the 1 grade flour in 2008, tons

Diagram 51. Structure of Russian production of wheat bread of the 1 grade flour by the largest enterprises in 2008, %

Table 44. Production volumes of wheat bread of the 2 grade flour by the largest Russian producers in 2006-2008, tons

Schedule 40. Production volumes of the largest Russian enterprises by the output of wheat bread and bakery products of the 2 grade flour in 2008, tons

Diagram 52. Structure of Russian production of wheat bread of the 2 grade flour by the largest enterprises in 2008, %

Table 45. Production volumes of rye bread by the largest Russian producers in 2006-2008, tons

Schedule 41. Production volumes of the largest Russian enterprises by the output of rye bread and bakery products in 2008, tons

Diagram 53. Structure of Russian production of rye bread by the largest enterprises in 2008, %

Table 46. Production volumes of diet bread and bakery products by the largest Russian producers in 2006-2008, tons

Schedule 42. Production volumes of the largest Russian enterprises by the output of diet bread and bakery products in 2008, tons

Diagram 54. Structure of Russian production of diet bread and bakery products by the largest enterprises in 2008, %

Table 47. Production volumes of fancy bakery products by the largest Russian producers in 2006-2008, tons

Schedule 43. Production volumes of the largest Russian enterprises by the output of fancy bread and bakery products in 2008, tons

Diagram 55. Structure of Russian production of fancy bakery products by the largest enterprises in 2008, %

Table 48. Production volumes of ring-shaped products by the largest Russian producers in 2006-2008, tons

Schedule 44. Production volumes of the largest Russian enterprises by the output of ring-shaped products in 2008, tons

Diagram 56. Structure of Russian production of ring-shaped products by the largest enterprises in 2008, %

Table 49. Production volumes of bakery products of the highest grade wheat flour by the largest Russian producers in 2006-2008, tons

Schedule 45. Production volumes of the largest Russian enterprises by the output of bakery products of the highest grade wheat flour in 2008, tons

Diagram 57. Structure of Russian production of bakery products of the highest grade wheat flour by the largest enterprises in 2008, %

Table 50. Production volumes of bakery products of the 1 grade wheat flour by the largest Russian producers in 2006-2008, tons

Schedule 46. Production volumes of the largest Russian enterprises by the output of bakery products of the 1 grade wheat flour in 2008, tons

Diagram 58. Structure of Russian production of bakery products of the 1 grade wheat flour by the largest enterprises in 2008, %

Table 51. Production volumes of pasties, pies and doughnuts by the largest Russian producers in 2006-2008, tons

Schedule 47. Production volumes of the largest Russian enterprises by the output of pasties, pies and doughnuts in 2008, tons

Diagram 59. Structure of Russian production of pasties, pies and doughnuts by the largest enterprises in 2008, %

Table 52. Production volumes of rusks, toasts and crisp breads by the largest Russian producers in 2006-2008, tons

Schedule 48. Production volumes of the largest Russian enterprises by the output of rusks, toasts and crisp breads in 2008, tons

Diagram 60. Structure of Russian production of rusks, toasts and crisp breads by the largest enterprises in 2008, %

Table 53. The largest enterprises with the main type of activity: production of bread and bakery and flour confectionery goods of long-term storage (by the volume of outputs in 2010)

Table 54. The largest enterprises with the main type of activity: production of bread and bakery and flour confectionery goods of short-term storage (by the volume of outputs in 2010)

13. ANALYSIS OF EXPORT OF BREAD AND BAKERY PRODUCTS

Schedule 49. Dynamics of Russian export volume of bakery products in 2007-2011*, tons

Schedule 50. Dynamics of Russian export volume of bakery products in 2007-2011*, ths dollars

Schedule 51. Dynamics of Russian export volume of bakery products by months in 2009-2011, tons

Schedule 52. Dynamics of Russian export volume of bakery products by months in 2009-2011, ths dollars

Diagram 61. Structure of Russian export of bakery products by types in physical terms in 2007-2011*, %

Diagram 62. Change of structure of Russian export of bakery products by countries of destination in cost terms in 2007-2011*, %

Schedule 53. Dynamics of Russian export volume of rusks, toasts and similar roasted products in 2007-2011*, tons

Schedule 54. Dynamics of Russian export volume of rusks, toasts and similar roasted products in 2007-2011*, ths dollars

Table 55. Volumes of Russian export of rusks, toasts and similar roasted products by countries of destination in 2007-2010, tons

Diagram 63. Structure of Russian export of rusks, toasts and similar roasted products by countries of destination in physical terms in 2010, %

Table 56. Volumes of Russian export of rusks, toasts and similar roasted products by countries of destination in 2007-2010, ths dollars

Diagram 64. Structure of Russian export of rusks, toasts and similar roasted products by countries of destination in cost terms in 2010, %

Schedule 55. Dynamics of Russian export volume of crisp breads in 2007-2011*, tons

Schedule 56. Dynamics of Russian export volume of crisp breads in 2007-2011*, ths dollars

Table 57. Volumes of Russian export of crisp breads by countries of destination in 2007-2010, tons

Diagram 65. Structure of Russian export of crisp breads by countries of destination in physical terms in 2010, %

Table 58. Volumes of Russian export of crisp breads by countries of destination in 2007-2010, ths dollars

Diagram 66. Structure of Russian export of crisp breads in cost terms by countries of destination in 2010, %

14. ANALYSIS OF IMPORT OF BREAD AND BAKERY PRODUCTS

Schedule 57. Dynamics of Russian import volume of bakery products in 2007-2011*, tons

Schedule 58. Dynamics of Russian import volume of bakery products in 2007-2011*, ths dollars

Schedule 59. Dynamics of Russian import volume of bakery products by months in 2009-2011, tons

Schedule 60. Dynamics of Russian import volume of bakery products in 2007-2011*, ths dollars

Diagram 67. Structure of Russian import of bakery products by types in physical terms in 2007-2011*, %

Diagram 68. Structure of Russian import of bakery products by types in cost terms in 2007-2011*, %

Schedule 61. Dynamics of Russian import volume of rusks, toasts and similar roasted products in 2007-2011*, tons

Schedule 62. Dynamics of Russian import volume of rusks, toasts and similar roasted products in 2007-2011*, ths dollars

Table 59. Volumes of Russian import of rusks, toasts and similar roasted products by the importing countries in 2007-2010, tons

Diagram 69. Structure of Russian import of rusks, toasts and similar roasted products by countries of origin in physical terms in 2010, %

Table 60. Volumes of Russian import of rusks, toasts and similar roasted products by the importing countries in 2007-2010, ths dollars

Diagram 70. Structure of Russian import of rusks, toasts and similar roasted products by countries of origin in cost terms in 2010, %

Schedule 63. Dynamics of Russian import volume of crisp breads in 2007-2011*, tons

Schedule 64. Dynamics of Russian import volume of crisp breads in 2007-2011*, ths dollars

Table 61. Volumes of Russian import of crisp breads by the importing countries in 2007-2010, tons

Diagram 71. Structure of Russian import of crisp breads by countries of origin in physical terms in 2010, %

Table 62. Volumes of Russian import of crisp breads by the importing countries in 2007-2010, ths dollars

Diagram 72. Structure of Russian import of crisp breads by countries of origin in cost terms in 2010, %

15. PRODUCER PRICES FOR BREAD AND BREAD AND BAKERY PRODUCTS

Schedule 65. Dynamics of average producer prices for wheat flour bread of the highest-grade flour in RF in 2007-2011*, rub/ton

Schedule 66. Dynamics of average producer prices for wheat flour bread of the highest-grade flour in RF by months in 2007-2011, rub/ton

Table 63. Dynamics of average producer price for wheat flour bread of the highest-grade flour in RF by months in 2007-2011, rub/ton

Schedule 67. Dynamics of average producer prices for wheat flour bread of the 1 grade flour in RF in 2007-2011*, rub/ton

Schedule 68. Dynamics of average producer prices for wheat flour bread of the 1 grade flour in RF by months in 2007-2011, rub/ton

Table 64. Dynamics of average producer prices for wheat flour bread of the 1 grade flour in RF by months in 2007-2011, rub/ton

Schedule 69. Dynamics of average producer prices for rye bread and rye-wheat bread in RF in 2007-2011*, rub/ton

Schedule 70. Dynamics of average producer prices for rye bread and rye-wheat bread in RF by months in 2007-2011, rub/ton

Table 65. Dynamics of average producer prices for rye bread in RF by months in 2007-2011, rub/ton

Schedule 71. Dynamics of average producer prices for fancy bakery products in RF in 2007-2011*, rub/ton

Schedule 72. Dynamics of average producer prices for fancy bakery products in RF by months in 2007-2011, rub/ton

Table 66. Dynamics of average producer prices for fancy bakery products in RF by months in 2007-2011, rub/ton

Schedule 73. Dynamics of average producer prices for crisp breads in RF in 2009-2011*, rub/ton

Schedule 74. Dynamics of average producer prices for crisp breads in RF by months in 2009-2011, rub/ton

Table 67. Dynamics of average producer prices for crisp breads in RF by months in 2009-2011, rub/ton

Schedule 75. Dynamics of average producer prices for ring-shaped bakery products in RF in 2009-2011*, rub/ton

Schedule 76. Dynamics of average producer prices for ring-shaped bakery products in RF by months in 2009-2011, rub/ton

Table 68. Dynamics of average producer for ring-shaped bakery products in RF by months in 2009-2011, rub/ton

Schedule 77. Dynamics of average producer prices for rusk products in RF by months in 2010-2011, rub/ton

Table 69. Dynamics of average producer prices for rusk products in RF by months in 2010-2011, rub/ton

16. RETAIL PRICES FOR BREAD AND BAKERY PRODUCTS

Schedule 78. Dynamics of average retail prices for bread and bakery products of the highest grade wheat flour in RF in 2007-2011*, rub/kg

Schedule 79. Dynamics of average retail prices for bread and bakery products of the highest grade wheat flour in RF by months in 2007-2011, rub/kg

Table 70. Dynamics of average retail prices for bread and bakery products of the highest grade wheat flour by months in 2007-2011, rub/kg

Schedule 80. Dynamics of average retail prices for bread and bakery products of the 1 and 2 grade wheat flour in RF in 2007-2011*, rub/kg

Schedule 81. Dynamics of average retail prices for bread and bakery products of the 1 and 2 grade wheat flour in RF by months in 2007-2011, rub/kg

Table 71. Dynamics of average retail prices for bread and bakery products of wheat flour 1 and 2 grades by months in 2007-2011, rub/kg

Schedule 82. Dynamics of average retail prices for mixed wheat-rye bread in RF in 2007-2011*, rub/kg

Schedule 83. Dynamics of average retail prices for mixed wheat-rye bread in RF by months in 2007-2011, rub/kg

Table 72. Dynamics of average retail prices for mixed wheat-rye bread by months in 2007-2011, rub/kg

Schedule 84. Dynamics of average retail prices for ring-shaped bakery products in RF in 2007-2011*, rub/kg

Schedule 85. Dynamics of average retail prices for ring-shaped bakery products in RF by months in 2007-2011, rub/kg

Table 73. Dynamics of average retail prices for ring-shaped bakery products by months in 2007-2011, rub/kg

Schedule 86. Dynamics of average retail prices for fancy bun goods of the highest-grade flour (single-piece) in RF in 2007-2011*, rub/kg

Schedule 87. Dynamics of average retail prices for fancy bun goods of the highest-grade flour (single-piece) in RF by months in 2007-2011, rub/kg

Table 74. Dynamics of average retail prices for fancy bun goods of the highest-grade flour (single-piece) by months in 2007-2011, rub/kg

Schedule 88. Dynamics of average retail prices for breakfast cereals (flocks of cereals) in RF in 2009-2011*, rub/kg

Schedule 89. Dynamics of average retail prices for breakfast cereals (flocks of cereals) in RF by months in 2009-2011, rub/kg

Table 75. Dynamics of average retail prices for breakfast cereals (flocks of cereals) by months in 2009-2011, rub/kg

17. STRUCTURE OF RETAIL PRICES FOR BREAD

Table 76. Structure of the retail price for wheat flour bread of the highest-grade flour, long loaf, in RF in 2010

Diagram 73. Structure of retail prices for bread of the highest grade wheat flour, long loaf, in RF in 2010, rub as per kg

Diagram 74. Structure of retail prices for bread of the highest grade wheat flour, long loaf, in RF in 2010, % to the retail price

Table 77. Structure of retail prices for bread made of wheat flour of the 1 and 2 grade, long loaf, in RF in 2010

Diagram 75. Structure of retail prices for bread made of wheat flour of the 1 and 2 grades, long loaf, in RF in 2010, rub as per kg

Diagram 76. Structure of retail prices for bread made of wheat flour of the 1 and 2 grade, long loaf, in RF in 2010, % to the retail price

Table 78. Structure of the retail price for bread of rye and rye-wheat flour in RF in 2010

Diagram 77. Structure of the retail price for bread of rye and rye-wheat flour in RF in 2010, rub as per kg

Diagram 78. Structure of the retail price for bread of rye and rye-wheat flour in RF in 2010, % to the retail price

18. FACTORS, INFLUENCING THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

19. CONSUMER PREFERENCES ON THE MARKET OF BREAD AND BAKERY PRODUCTS

Schedule 90. Criteria of the choice of bread products by Russian consumers

20. PROFILES OF THE LARGEST ENTERPRISES OF BREAD AND BAKERY PRODUCTS PRODUCTION

Table 79. Number of personnel of «Khlebniy dom» JSC, people

Table 80. Shareholders of «Khlebniy dom» JSC

Table 81. Subsidiaries of «Khlebniy dom» JSC

Table 82. Production volumes of «Khlebniy dom» JSC

Table 83. Balance sheet of «Khlebniy dom» JSC, ths rubles

- Table 84. Profit and loss statement of «Khlebniy dom» JSC, ths rubles
- Table 85. Cash-flow statement of «Khlebniy dom» JSC, ths rubles
- Table 86. Financials of «Khlebniy dom» JSC
- Table 87. Number of personnel of «Karavay» JSC, people
- Table 88. Shareholders of «Karavay» JSC
- Table 89. Subsidiaries of «Karavay» JSC
- Table 90. Production volumes of «Karavay» JSC
- Table 91. Balance sheet of «Karavay» JSC, ths rubles
- Table 92. Profit and loss statement of «Karavay» JSC, ths rubles
- Table 93. Cash-flow statement of «Karavay» JSC, ths rubles
- Table 94. Financials of «Karavay» JSC
- Table 95. Number of personnel of «Lipetskhlebmakaronprom» JSC, people
- Table 96. Shareholders of «Lipetskhlebmakaronprom» JSC
- Table 97. Production volumes of «lipetskhlebmakaronprom» JSC
- Table 98. Balance sheet of «Lipetskhlebmakaronprom» JSC, ths rubles
- Table 99. Profit and loss statement of «Lipetskhlebmakaronprom» JSC, ths rubles
- Table 100. Cash-flow statement of «Lipetskhlebmakaronprom» JSC, ths rubles
- Table 101. Financials of «Lipetskhlebmakaronprom» JSC
- Table 102. Number of personnel of «Khlebozavod №22» JSC, people
- Table 103. Shareholders of «Khlebozavod №22» JSC
- Table 104. Subsidiaries of «Khlebozavod №22» JSC
- Table 105. Production volumes of «Khlebozavod №22» JSC
- Table 106. Balance sheet of «Khlebozavod №22» JSC, ths rubles
- Table 107. Profit and loss statement of «Khlebozavod №22» JSC, ths rubles
- Table 108. Cash-flow statement of «Khlebozavod №22» JSC, ths rubles
- Table 109. Financials of «Khlebozavod №22» JSC
- Table 110. Number of personnel of «Perviy khlebokombinat» JSC, people
- Table 111. Shareholders of «Perviy khlebokombinat» JSC
- Table 112. Shareholders of «Perviy khlebokombinat» JSC
- Table 113. Production volumes of «Perviy khlebokombinat» JSC
- Table 114. Balance sheet of «Perviy khlebokombinat» JSC, ths rubles
- Table 115. Profit and loss statement of «Perviy khlebokombinat» JSC, ths rubles
- Table 116. Cash-flow statement of «Perviy khlebokombinat» JSC, ths rubles
- Table 117. Financials of «Perviy khlebokombinat» JSC

21. FORECAST OF THE MARKET OF BREAD AND BAKERY PRODUCTS DEVELOPMENT FOR 2011-2014

Schedule 91. Dynamics of volume of the Russian market of bread and bakery products in 2009-2010 and forecast for 2011-2014*, tons

Schedule 92. Dynamics of import share on the market of bread and bakery products in physical terms in 2009-2014*, %

ABOUT INTESCO RESEARCH GROUP COMPANY

ABOUT INTESCO RESEARCH GROUP COMPANY

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**