Intesco Research Group

WORLD MARKET OF BEEF. RUSSIAN MARKET OF BEEF.

MOSCOW 2012

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RESEARCH METHODOLOGY

Subject of the research:

RUSSIAN AND WORLD MEAT MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2014

Region of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

VOLUME OF THE RUSSIAN CATTLE MEAT MARKET
ANALYSIS OF MEAT RETAIL SALES
STATE REGULATION OF BEEF MARKET
TRENDS ON THE RUSSIAN BEEF MARKET RAW MATERIAL BASE
BEEF PRODUCTION (FRESH-KILLED WEIGHT)
CATTLE PRODUCTION FOR SLAUGHTER (LIVE WEIGHT)
THE LARGEST PLAYERS ON THE RUSSIAN BEEF MARKET
THE LARGEST RUSSIAN PRODUCERS BY THE REVENUES VOLUME
THE LARGEST RUSSIAN PRODUCERS BY THE PRODUCTION VOLUME
ANALYSIS OF RUSSIAN CATTLE MEAT EXPORT
ANALYSIS OF RUSSIAN CATTLE MEAT IMPORT
PRODUCER PRICES
RETAIL PRICES
STRUCTURE OF RETAIL PRICE FOR BEEF
FORECAST OF THE RUSSIAN BEEF MARKET DEVELOPMENT FOR 2012-2014

Largest Russian companies with profiles:

«Myasokombinat «Klinskiy» JSC;
«Myasoptitsekombinat «Penzenskiy» JSC;
«Myasokombinat Uluanovskiy» JSC;
«Myasozagotovitelniy zavod “Cherepanovsliy” LLC;
«Labinskiy» JSC;

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, 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

Retail sale reports

Materials of the field's main players

Field print and electronic publications

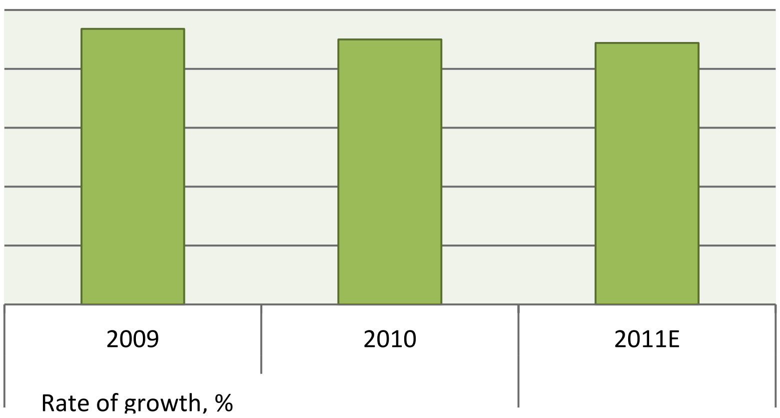
The research contains 76 schedules, 39 diagrams, 81 tables.

EXTRACTS FROM RESEARCH

CHAPTER 5

VOLUME OF THE RUSSIAN CATTLE MEAT MARKET

In the period from 2009 till 2011 the cattle meat market *** by ***,5%. In 2011 its volume was equal to *** tons. ***ease amounted to ***%. Compared to 2010 The negative dynamics of the cattle meat market volume was primarily due to the decrease of production volumes in the country and ***.



Dynamics of frozen cattle meat consumrtion in 2009-2011, kg/person

From 2009 till 2011 the share of the foreign producers of the cattle meat on the Russian market increased. . According to Intesco Research Group specialists, in 2011 import content was equal to ***% of the Russian market, that was the maximal parameter for 3 years.

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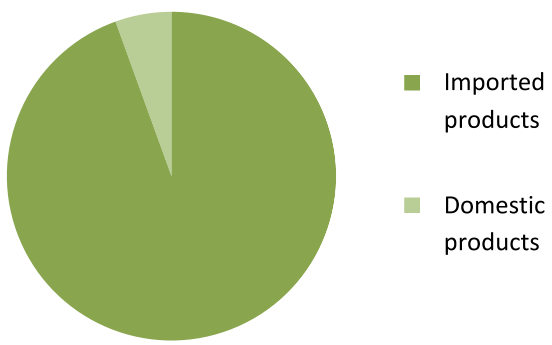
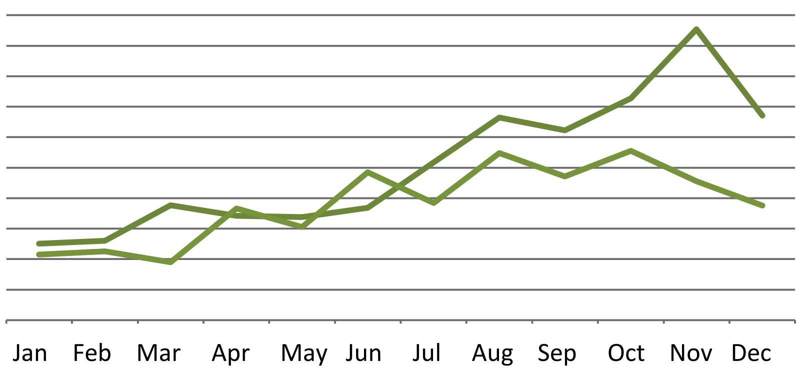


Import content of frozen cattle meat on the russian market in 2011, tons

CHAPTER 11

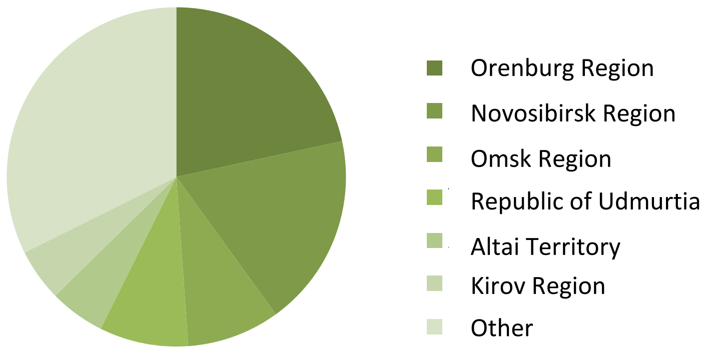
CATTLE MEAT PRODUCTION

In 2005 there was a decrease of production volumes of cattle meat, fresh-killed, cooled and cold. In 2011 the trend continued, the decrease amounted to ***,2%. It was ***% less the level of 1999 and ***% less the maximum of 2005. Dynamics of the decrease was determined by many factors, the main of which was – ***.



Dynamics of cattle meat production subfrozen, frozen, deep frozen and defrosted by months in 2010-2011, tons

*** of total frozen cattle meat production in 2011 were produced in two federal districts: *** and ***. Their total share in 2011 amounted to ***,7%. At the same time there was a redistribution of their shares in total structure of the Russian sub-frozen, frozen, deep frozen and defrosted cattle meat production. Thus, since 2009 the share of *** FD decreased by ***%, and the share of Volga FD increased by ***%.



Production structure of cattle meat, subfrozen, frozen, deep frozen and defrosted by FD in 2011, tons

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17. PRODUCER PRICES

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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

и многие другие

PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS