

**Intesco  
Research  
Group**

# WORLD MARKET OF BEEF. RUSSIAN MARKET OF BEEF.



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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

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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;

«Myasozagotovitelnyy zavod “Cherepanovskiy” 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

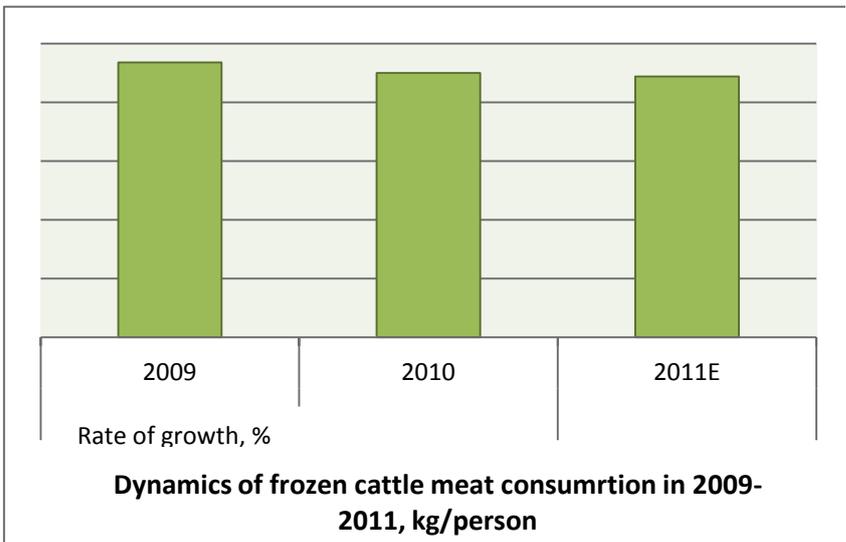
**The research contains 76 schedules, 39 diagrams, 81 tables.**

## EXTRACTS FROM RESEARCH

### CHAPTER 5

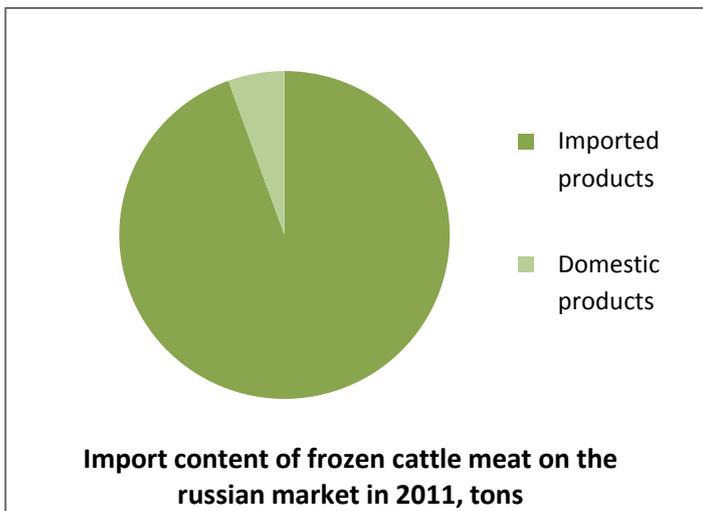
#### VOLUME OF THE RUSSIAN CATTLE MEAT MARKET

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 \*\*\*.



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.

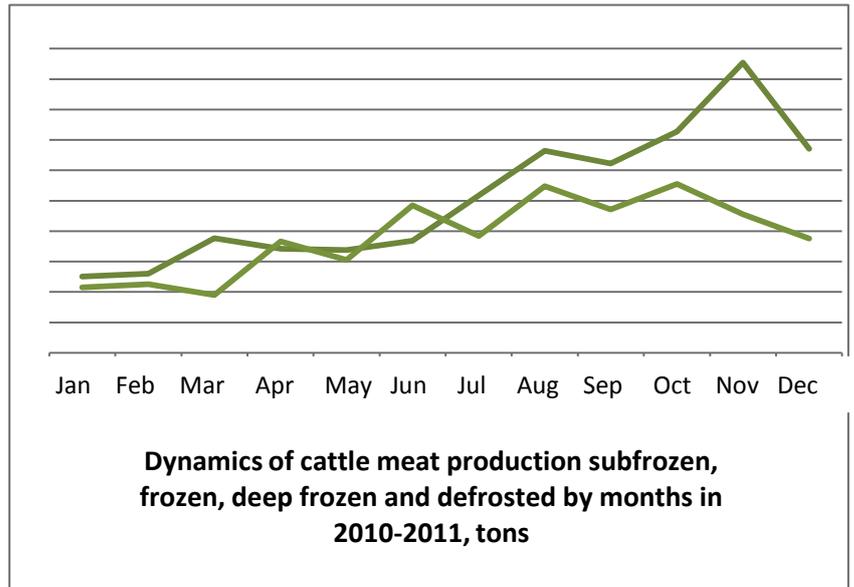


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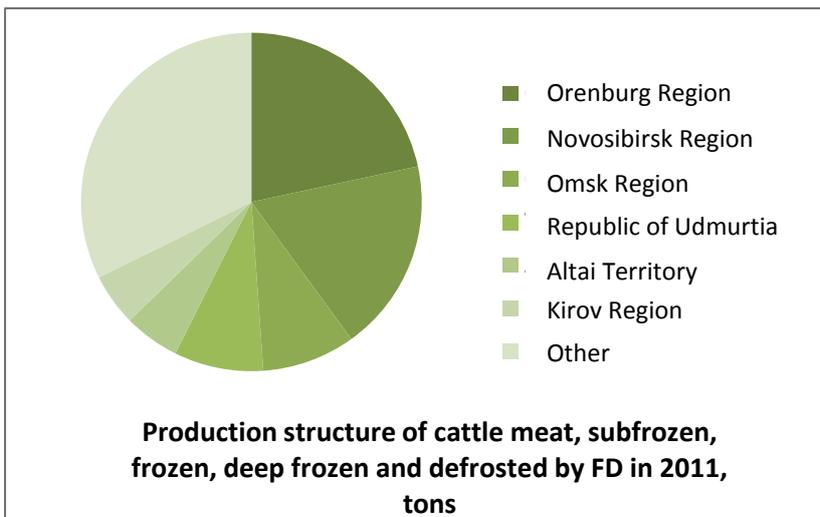
CATTLE MEAT PRODUCTION

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 4% less the level of 1999 and 10% less the maximum of 2005. Dynamics of the decrease was determined by many factors, the main of which was – 10%.

10% of total frozen cattle meat production in 2011 were produced in two federal districts: 10% and 10%. Their total share in 2011 amounted to 20%. 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 10% FD decreased by 10%, and the share of Volga FD increased by 10%.



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### **ABOUT INTESCO RESEARCH GROUP**

## 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.

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