

**Intesco
Research
Group**

CEREAL FLAKES AND RUSSIAN MARKET OF CEREAL FLAKES



MOSCOW 2012

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	6
EXTRACTS FROM RESEARCH.....	8
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	10
ABOUT INTESCO RESEARCH GROUP	14

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Number of population

The largest cities

Social standards of living dynamics

Economic activity

1.2. Economic situation

Dynamics of economic development

Stability of the state budget

1.3. Position of RF in the world

Share of RF in the world population

2. SUBJECT OF RESEARCH

2.1. Characteristics, description of products made of cereals

2.2. Methods of cereal flakes classification

Classification of cereal flakes by ARCP

Classification of cereal flakes by ARCPEA

Classification of cereal flakes by FEA CN

3. VOLUME OF THE RUSSIAN WAFERS MARKET

3.1. Volume dynamics of the Russian cereal flakes market

3.2. Import content on the Russian cereal flakes market

3.3. Dynamics of import content on the Russian cereal flakes market

3.4. Per capita consumption of cereal flakes

4. CEREAL FLAKES PRODUCTION IN RUSSIA

4.1. Dynamics of the Russian cereal flakes production volume by years

4.2. Dynamics of the Russian cereal flakes production volume by months

4.3. Structure of cereal flakes production by federal districts of RF

4.4. Regional structure of the Russian cereal flakes production

5. ANALYSIS OF THE RUSSIAN CEREAL FLAKES IMPORT

5.1. Dynamics of cereal flakes import by years

5.2. Dynamics of cereal flakes import by months

5.3. Volumes of cereal flakes import by supplying countries

5.4. Structure of cereal flakes import by supplying countries

6. ANALYSIS OF THE RUSSIAN CEREAL FLAKES EXPORT

6.1. Dynamics of cereal flakes export by years

6.2. Dynamics of cereal flakes export by months

6.3. Dynamics of cereal flakes export by countries of destination

6.4. Structure of cereal flakes export by countries of destination

7. PRODUCER PRICES FOR CEREAL FLAKES IN RUSSIA

7.1. Dynamics of producer prices for cereal flakes by years

7.2. Dynamics of the average producer prices for cereal flakes by months

8. RETAIL PRICES FOR CEREAL FLAKES IN RUSSIA

8.1. Dynamics of retail prices for cereal flakes by years

8.2. Dynamics of the average retail prices for cereal flakes by months

9. THE LARGEST RUSSIAN PRODUCERS OF CEREAL FLAKES

9.1. The largest Russian producers of cereal flakes

9.2. Profiles of five largest companies producing cereal flakes

«Archeda-product» LLC

«Korotoyakskiy elevator» JSC

«Hercules» JSC

«Kostromskoy kombinat khleboproduktov» JSC

«Peterburgskiy melnichniy kombinat» JSC

10. TRENDS ON THE RUSSIAN MARKET OF CEREAL FLAKES

11. STATE REGULATIONS OF THE CEREAL FLAKES MARKET

12. FORECAST OF THE RUSSIAN CEREAL FLAKES MARKET DEVELOPMENT FOR 2012-2015

ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

CEREAL FLAKES MARKET

Goal of research:

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2015

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

VOLUME OF THE RUSSIAN CEREAL FLAKES MARKET

CEREAL FLAKES PRODUCTION IN RUSSIA

ANALYSIS OF THE RUSSIAN CEREAL FLAKES IMPORT

ANALYSIS OF THE RUSSIAN CEREAL FLAKES EXPORT

PRODUCER PRICES FOR CEREAL FLAKES IN RUSSIA

RETAIL PRICES FOR CEREAL FLAKES IN RUSSIA

THE LARGEST RUSSIAN PRODUCERS OF CEREAL FLAKES

TRENDS ON THE RUSSIAN MARKET OF CEREAL FLAKES

FORECAST OF THE RUSSIAN CEREAL FLAKES MARKET DEVELOPMENT FOR 2012-2015

The largest companies with profiles:

«ARCHEDA-PRODUCT» LLC

«KOROTOYAKSKIY ELEVATOR» JSC

«HERCULES» JSC

«KOSTROMSKOY KOMBINAT KHLEBOPRODUKTOV» JSC

«PETERBURGSKIY MELNICHNIY KOMBINAT» 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

Ministry of Economic development of RF

Federal Customs Service

Federal Tax Service

Field expert evaluations

Reports on retailing

Materials of the field's main players

Field print and electronic publications

The research contains 30 schedules, 8 diagrams and 48 tables.

EXTRACTS FROM RESEARCH

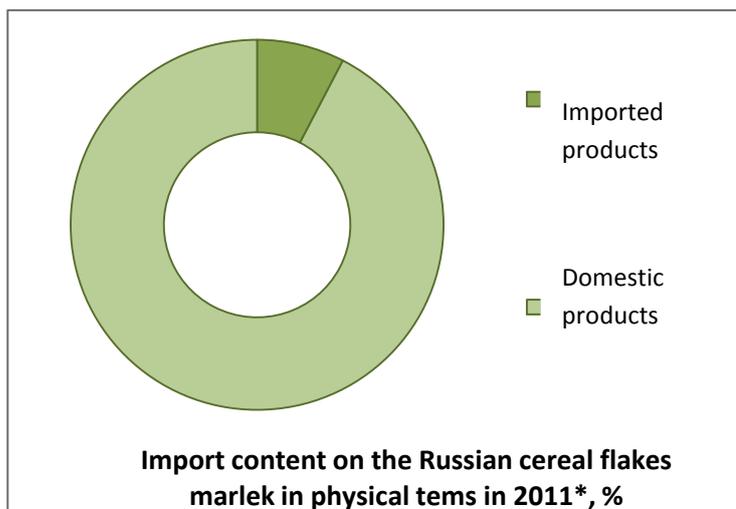
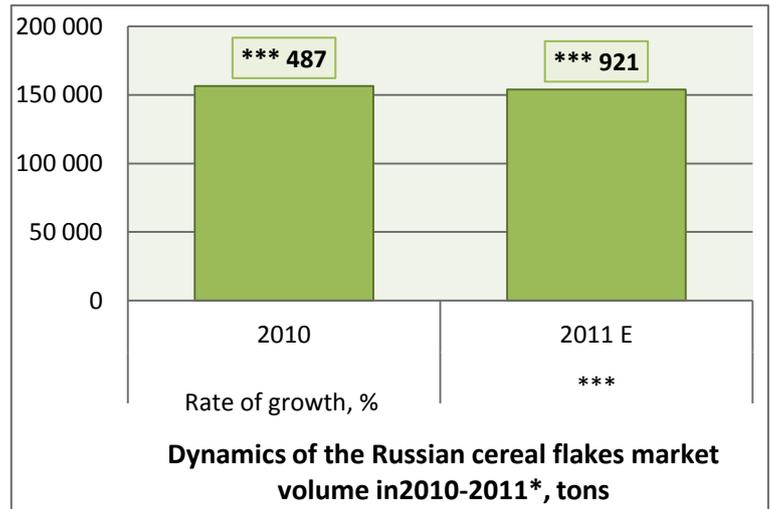
CHAPTER 3

VOLUME OF THE RUSSIAN CEREAL FLAKES MARKET

In 2011 volume of the Russian cereal flakes market decreased by **% to *** 921 tons, according to Intesco Research Group, due to the increase of export supplies on the territory of Ukraine.

The most part of the cereals on the Russian market is represented by oats, about one third of oats is accounted for flakes. Oat flakes Hercules form about 7,8% of total cereals sales.

In 2011, every citizen of Russia accounted for slightly more than 1 kg of cereal flakes.



According to Intesco Research Group, in 2011 import content of the cereal flakes market amounted to **%. The most part of the products is imported from Finland, less – from Lithuania.

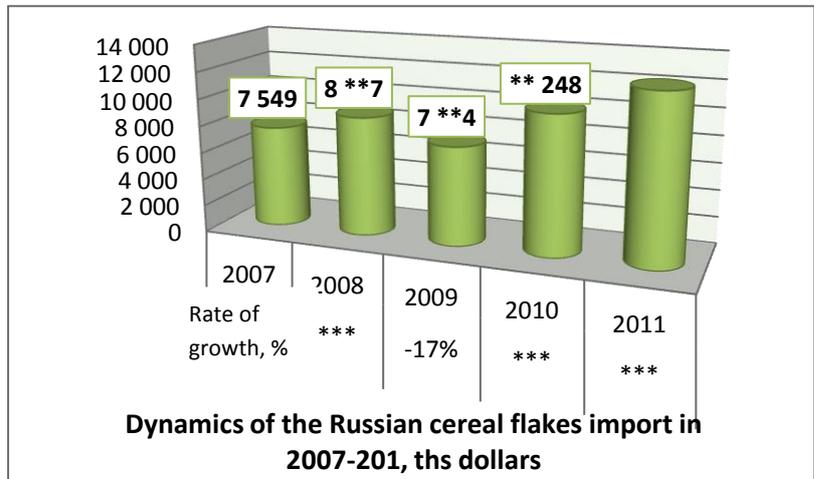
CHAPTER 5

ANALYSIS OF THE RUSSIAN CEREAL FLAKES IMPORT

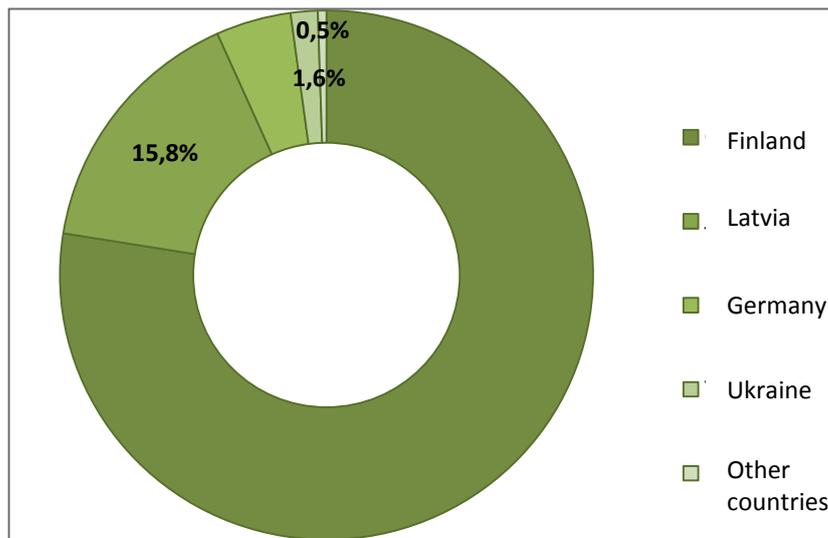
In 2009 import decline in cost terms amounted to about **%. Products for ** mln dollars were imported on the territory of Russia. It should be mentioned that in 2008 when supplies volumes decreased by more than 10%, their price increased by 17% *7%.

During the last two years cereal flakes import volume increased by 68%: from 7,3 mln dollars in 2009 to ** mln dollars in 2011.

In 2011 the leader by cereal flakes import in cost terms was Finland.



Compared to 2010 the growth amounted to 20%. At the same time import volume from Latvia decreased by 12%. German producers gained *** ths dollars from sales of their products to Russian consumers.



LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

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. Forecast of the ratio of demographic load dynamics in 2011-2031

Table 1. Number of population of the largest Russian cities according to all-Russian census of 2010, ths people

Schedule 4. Dynamics of number of employed and unemployed people in RF in 2006-2010, ths people

Schedule 5. Dynamics of share of the unemployed in economically active population by FD of RF in 2006-2010, %

Schedule 6. Dynamics of GDP of RF in prices of 2008 in 2001-2011, billion rubles

Schedule 7. Investments into the fixed capital of RF in 2001-2010

Schedule 8. Surplus/deficit of consolidated budget of RF in 2006-2010, %

Schedule 9. Dynamics of total external debt of RF 2001-2010

Schedule 10. Dynamics of total external debt structure of RF by the main sectors in 2001-2010, %

Schedule 11. Consumer prices index in RF in 2001-2010, %

Schedule 12. Share of RF in the population of the world in 2000-2010 and forecast until 2100

Schedule 13. Share of RF in the world GDP in 2001-2010 and forecast for 2011-2016, %

2. SUBJECT OF RESEARCH

3. VOLUME OF THE RUSSIAN CEREAL FLAKES MARKET

Schedule 14. Dynamics of the Russian cereal flakes market volume in 2010-2011*, tons

Diagram 1. Import content on the Russian cereal flakes market in physical terms in 2011*, %

Diagram 2. Dynamics of import content on the Russian cereal flakes market in physical terms in 2010-2011*, %

Schedule 15. Per capita consumption of cereal flakes in Russia in 2010-2011, kg/person

4. CEREAL FLAKES PRODUCTION IN RUSSIA

Schedule 16. Dynamics of the Russian cereal flakes production volume in 2010-2011*, tons

Schedule 17. Dynamics of the Russian cereal flakes production volume by months in 2010-2011, ths tons

Table 2. Dynamics of cereal flakes production in the largest federal districts of 2010-2011, tons

Diagram 3. Structure of Russian cereal flakes production by federal districts of RF in 2011*, %

Table 3. Volumes of cereal flakes production in regions of RF in 2010-2011, tons

Diagram 4. Regional structure of the Russian cereal flakes production in 2011*, %

5. ANALYSIS OF THE RUSSIAN CEREAL FLAKES IMPORT

Schedule 18. Dynamics of the Russian cereal flakes import in 2007-2011, tons

Schedule 19. Dynamics of the Russian cereal flakes import in 2007-2011, ths dollars

Schedule 20. Dynamics of the Russian cereal flakes import by months in 2007-2011, tons

Table 4. Volumes of Russian cereal flakes import by months in 2007-2011, tons

Schedule 21. Dynamics of the Russian cereal flakes import by months in 2007-2011, ths dollars

Table 5. Volumes of Russian cereal flakes import by months in 2007-2011, ths dollars

Table 6. Volumes of Russian cereal flakes import by supplying countries in 2007-2011, tons

Table 7. Volumes of Russian cereal flakes import by supplying countries in 2007-2010, ths dollars

Diagram 5. Structure of Russian cereal flakes import by countries of origin in physical terms in 2011, %

Diagram 6. Structure of Russian cereal flakes import by countries of origin in cost terms in 2011, %

6. ANALYSIS OF THE RUSSIAN CEREAL FLAKES EXPORT

Schedule 22. Dynamics of the Russian cereal flakes export in 2007-2011, tons

Schedule 23. Dynamics of the Russian cereal flakes export in 2007-2011*, ths dollars

Schedule 24. Dynamics of the Russian cereal flakes export by months in 2007-2011, tons

Table 8. Volumes of Russian cereal flakes export by months in 2007-2011, tons

Schedule 25. Dynamics of the Russian cereal flakes export by months in 2007-2011, ths dollars

Table 9. Volumes of Russian cereal flakes export by months in 2007-2011, ths dollars

Table 10. Volumes of Russian cereal flakes export by countries of destination in 2007-2011, tons

Table 11. Volumes of Russian cereal flakes export by countries of destination in 2007-2011, ths dollars

Diagram 7. Structure of Russian cereal flakes export by countries of destination in physical terms in 2011, %

Diagram 8. Structure of Russian cereal flakes export by countries of destination in cost terms in 2011, %

7. PRODUCER PRICES FOR CEREAL FLAKES IN RUSSIA

Schedule 26. Dynamics of the average producer prices for cereal flakes in RF in 2010-2011, rub/ton

Schedule 27. Dynamics of the average producer prices for cereal flakes in RF by months in 2010-2012, rub/ton

Table 12. Average producer prices for cereal flakes in RF by months in 2010-2012, rub/ton

Table 13. Average producer prices for oat-flakes by federal districts of RF in 2010-2012, rub/ton

8. RETAIL PRICES FOR CEREAL FLAKES IN RUSSIA

Schedule 28. Dynamics of the average retail prices for cereal flakes in RF in 2009-2011, rub/kg

Schedule 29. Dynamics of the average retail prices for cereal flakes in RF by months in 2009-2012, rub/kg

Table 14. Average retail prices for cereal flakes in RF by months in 2009-2012, rub/kg

Table 15. Average retail prices for oat-flakes Hercules in RF by regions and federal districts of RF in 2008-2011, rub/kg

9. THE LARGEST RUSSIAN PRODUCERS OF CEREAL FLAKES

Table 16. The largest producers of flattened grain and cereal flakes in 2010

Table 17. The largest producers of oat-flakes Hercules in 2009, tons

Table 18. Shareholders/founders of «Archeda-product» LLC

Table 19. Production volumes of «Archeda-product» LLC

Table 20. Balance sheet of «Archeda-product» LLC, ths rubles

Table 21. Profit and loss statement of «Archeda-product» LLC, ths rubles

Table 22. Cash flow statement of «Archeda-product» LLC, ths rubles

Table 23. Financials of «Archeda-product» LLC

Table 24. Shareholders/founders of «Korotoyakskiy elevator» JSC

Table 25. Production volumes of «Korotoyakskiy elevator» JSC

Table 26. Balance sheet of «Korotoyakskiy elevator» JSC, ths rubles

Table 27. Profit and loss statement of «Korotoyakskiy elevator» JSC, ths rubles

Table 28. Cash flow statement of «Korotoyakskiy elevator» JSC, ths rubles

Table 29. Financials of «Korotoyakskiy elevator» JSC

Table 30. Shareholders/founders of «Hercules» JSC

Table 31. Production volumes of «Hercules» JSC

Table 32. Balance sheet of «Hercules» JSC, ths rubles

Table 33. Profit and loss statement of «Hercules» JSC, ths rubles

Table 34. Cash flow statement of «Hercules» JSC, ths rubles

Table 35. Financials of «Hercules» JSC

Table 36. Shareholders/founders of «Kostromskoy kombinat khleboproduktov» JSC

Table 37. Production volumes of «Kostromskoy kombinat khleboproduktov» JSC

Table 38. Balance sheet of «Kostromskoy kombinat khleboproduktov» JSC, ths rubles

Table 39. Profit and loss statement of «Kostromskoy kombinat khleboproduktov» JSC, ths rubles

Table 40. Cash flow statement of «Kostromskoy kombinat khleboproduktov» JSC, ths rubles

Table 41. Financials of «Kostromskoy kombinat khleboproduktov» JSC

Table 42. Shareholders/founders of «Peterburgskiy melnichniy kombinat» JSC

Table 43. Subsidiaries of «Peterburgskiy melnichniy kombinat» JSC

Table 44. Production volumes of «Peterburgskiy melnichniy kombinat» JSC

Table 45. Balance sheet of «Peterburgskiy melnichniy kombinat» JSC, ths rubles

Table 46. Profit and loss statement of «Peterburgskiy melnichniy kombinat» JSC, ths rubles

Table 47. Cash flow statement of «Peterburgskiy melnichniy kombinat» JSC, ths rubles

Table 48. Financials of «Peterburgskiy melnichniy kombinat» JSC

10. TRENDS ON THE RUSSIAN MARKET OF CEREAL FLAKES

11. STATE REGULATIONS OF THE CEREAL FLAKES MARKET

12. FORECAST OF THE RUSSIAN CEREAL FLAKES MARKET DEVELOPMENT FOR 2012-2015

Schedule 30. Dynamics of the Russian cereal flakes market in 2010-2011 and forecast for 2012-2015, tons

ABOUT INTESCO RESEARCH GROUP

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**