

**Intesco
Research
Group**

WORLD MARKET OF INSTANT FOOD. RUSSIAN MARKET OF INSTANT FOOD



MOSCOW 2012

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

MARKET OF INSTANT FOOD

Goal of research:

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

Regions of research:

RUSSIA

REGIONS OF RUSSIA

Main blocks of research:

WORLD MARKET OF INSTANT FOOD

VOLUME OF THE RUSSIAN INSTANT FOOD MARKET

INSTANT FOOD PRODUCTION IN RUSSIA

ANALYSIS OF THE RUSSIAN INSTANT PRODUCTS IMPORT

ANALYSIS OF THE RUSSIAN INSTANT PRODUCTS EXPORT

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CHANNELS OF DISTRIBUTION ON THE MARKET OF INSTANT PRODUCTS

FORECAST OF THE RUSSIAN INSTANT FOOD MARKET DEVELOPMENT FOR 2012-2014

The largest Russian companies with profiles:

«Nestle Russia» LLC

«Doshirak Koya» LLC

«Mareven Food Central» LLC

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:

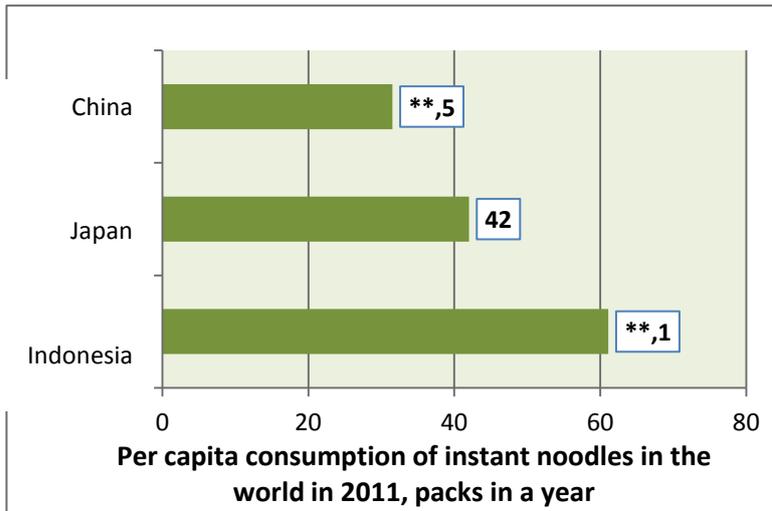
Federal State Statistics Service
Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sale reports
Materials of the field's main players
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The research contains 51 schedules, 22 diagrams, 45 tables

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WORLD MARKET OF INSTANT PRODUCTS



The capacity of the global instant food market exceeds ** billion dollars. The segment of ready-to-eat dishes is actively growing, reflecting the growing value of a healthy lifestyle (including nutrition). In addition, there has been marked an increasing differentiation and product offerings for small groups of consumers: vegetarians, diabetics. The most active

consumers of products of this category in the world are working women from 25 to 34 years.

Instant noodles had become the world's second food by volumes of the industrial production, bread ranked first. In 2011 the world has sold more than более **,2 billion packs of instant noodles. Almost half of this amount was purchased by the Chinese. In 2011 China sold **,47 billion packs of noodles, which was equal to **,2% of the noodles sold in the world.

Residents of Indonesia consumed most of the world instant noodles per capita – **,1 packs per person in a year, Japan ranked second – 42 packs, China – third – ** packs. Over the past two years, consumption in China grew by almost a third, Indonesia also showed strong growth: in 2009, the noodles were consumed by 4,5% of the population, in 2010 this share increased to 10%.

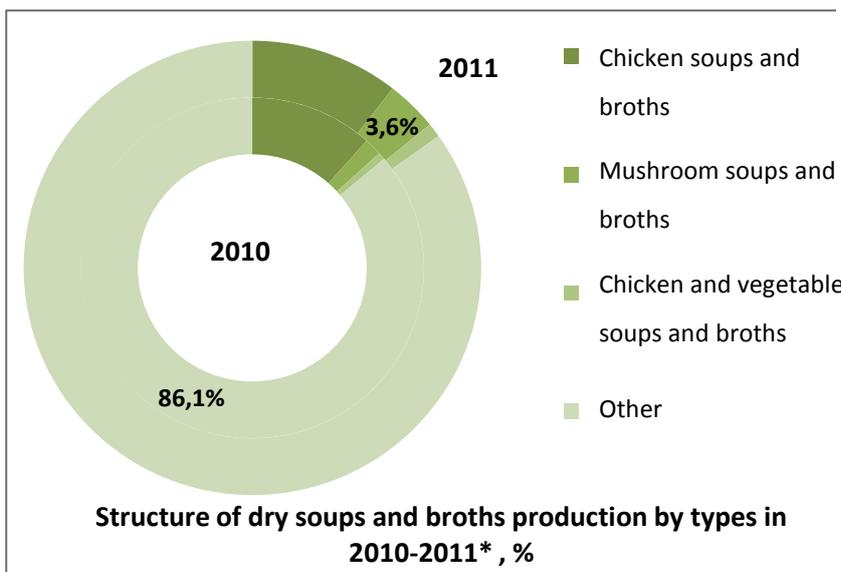
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PRODUCTION OF INSTANT PRODUCTS

Dry soups and broths in 2011 showed the decrease at the level of **20****. All the Russian producers produced 24 772 tons of products, including broth bricks. The greatest competition to dry soups and broths was represented by soup fillings and concentrates.



About one tenth of dry soups and broths belonged to category of chicken soups: **20,6%** - in 2010, and **20,5%** - in 2011. Mushrooms broths and soups had respectively **3,6%** and **3,6%**. At the same time it should be marked that production of these goods did not grow much and the growth was due to total decrease of total production.

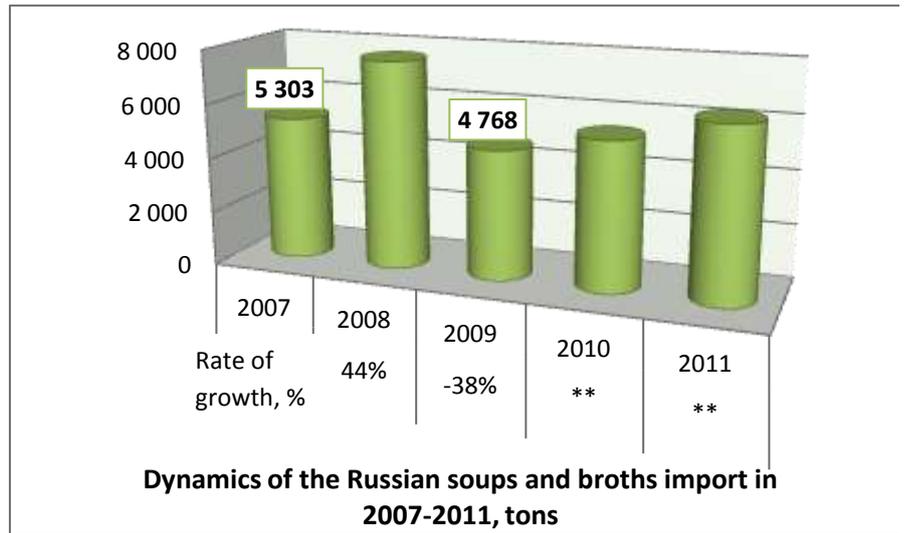


Chicken soups and broths with vegetables in 2010 formed about **20,6%** of the production, in 2011 – **20,5%**. The most part of dry soups was produced by Nizhniy Novgorod Region – over 95%.

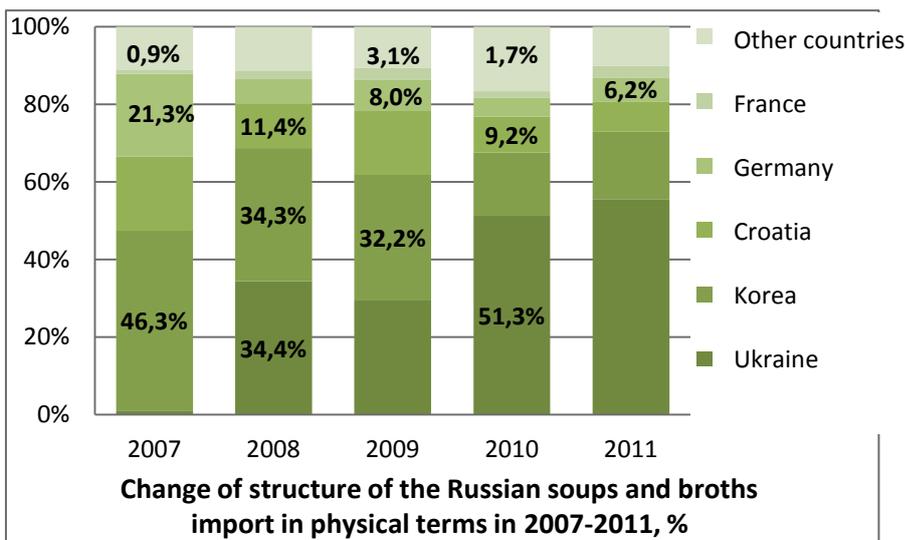
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In 2011 Russian import of ready-to-eat soups and broths amounted to *** tons. In recent two years the growing dynamics of foreign supplies was marked: by **% - in 2010 and by **% - in 2011.



More than half of the Russian import of soups and broths belonged to Ukraine. In 2011 this country had **,6% of the supplies in physical terms. Republic of Korea formed **,4% of the Russian import, Croatia – **,8%, Germany – 6,2%, France – **%.



Since 2007 the share of Korea (-29 %), Croatia (-11,4 %) and Germany (-15,1%), decreased and the share of Ukraine strengthened (+54,5%).

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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

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