

**Intesco
Research
Group**

KITCHEN FURNITURE AND RUSSIAN MARKET OF KITCHEN FURNITURE



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RESEARCH METHODOLOGY

Subject of research:

MARKET OF KITCHEN FURNITURE

Goal of research:

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS
DEVELOPMENT FOR 2013-2015

Regions of research:

RUSSIA, REGIONS OF RF

Basic units of research:

WORLD MARKET OF KITCHEN FURNITURE
ANALYSIS OF RETAIL SALES OF HOUSEHOLD FURNITURE
VOLUME OF RUSSIAN MARKET OF KITCHEN FURNITURE
TRENDS ON RUSSIAN MARKET OF KITCHEN FURNITURE
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2015

The largest Russian enterprises profiled:

FURNITURE FACTORY MARIA, OJSC
SOK-LOGISTIC, LLC

FOREMA-KUKHNI, CJSC
BOROVICHI-MEBEL, CJSC
PERVAYA MEBELNAYA FABRIKA, CJSC

The largest enterprises are presented by production volume, financial activity, sheet balances, profit and loss statements, cash-flow statements, subsidiaries and other information.

Information sources used:

Federal State Statistics Service
Ministry of Economic Development of RF
Federal Custom Service
Federal Tax Service
Evaluation of Experts of the Branch
Retail sales statements
Data of the main players of the branch
Printed and electronic publications of the branch

The research contains 55 Schedules, 37 Diagrams, 68 Tables.

EXTRACTS FROM RESEARCH

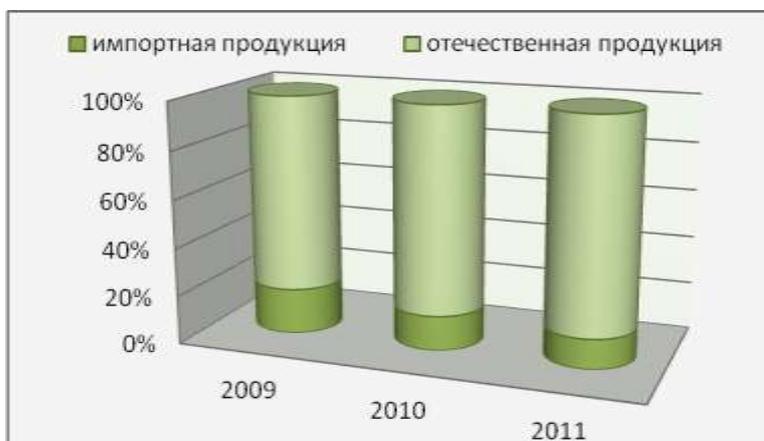
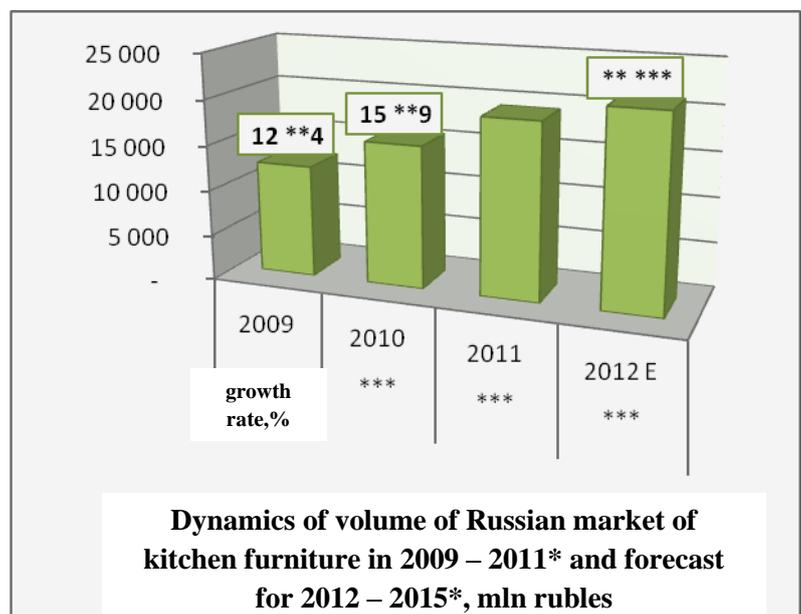
CHAPTER 5

VOLUME OF RUSSIAN MARKET
OF KITCHEN FURNITURE

According to estimations of analysts of Intesco Research Group within 2009 – 2011 Russian market of kitchen furniture was growing at the rate of **-% per annum and amounted to **,3 bln dollars in 2011. As a whole market was growing due to increase of production.

However in the first half of 2012 sharp reduction of rates of Russian production growth was observed. Analysts of Intesco Research Group forecast further increase of market volume approximately by **,5% per annum.

In 2011 share of import on Russian market of kitchen furniture amounted to *** % of the total cost. Due to growth of domestic production, share of import products reduced from **% in 2009 to **% in 2011.



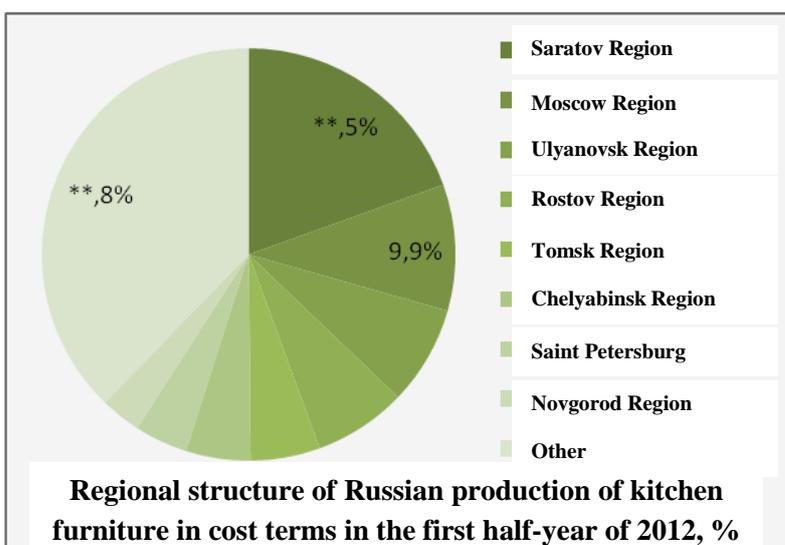
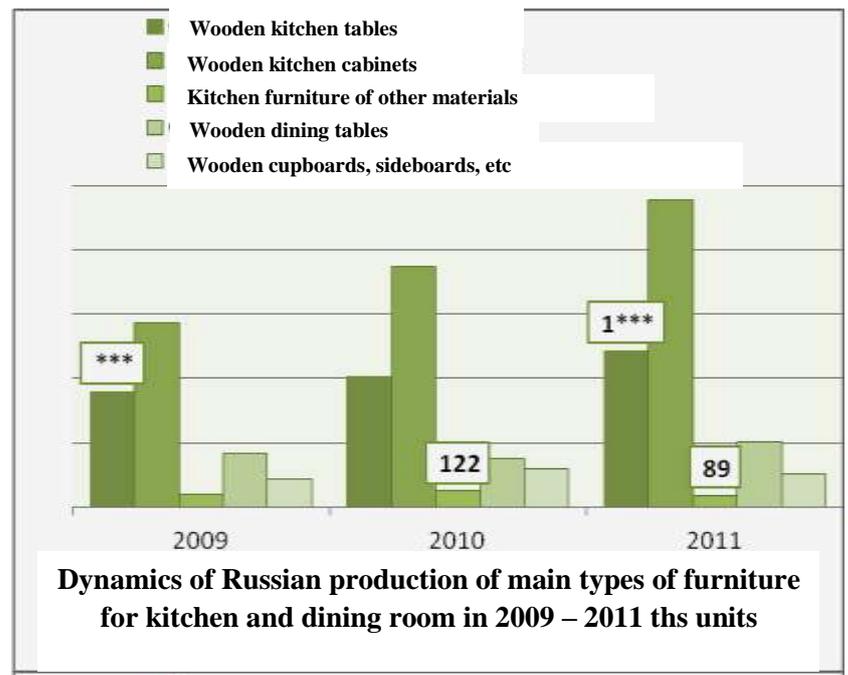
Dynamics of import share on Russian market of kitchen furniture in cost terms in 2009 – 2011, %

Volume of import in physical terms will grow more actively than in cost terms.

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Volumes of production of kitchen cabinets are growing at the most rapid rates: ** mln units were produced in 2009, a bit less - ** mln units were produced in 2010, while already ** mln units were produced in 2011, that is by **% more than the volume of 2010 and by **% - the volume of 2009. Production of kitchen table was also growing at rapid rates within the period specified. ** mln units were produced in 2009, a bit less - ** mln units were produced in 2010, while ** mln units were produced in 2012, that is by **% more than the level of 2010 and by **% - the level of 2009. Growth of manufacture volumes of products belonged to other categories is not steady.



Market of kitchen furniture in Russia is characterized by high regional concentration. Thus, in 2011 about 64% of the total Russian production of kitchen furniture in cost terms was concentrated in the eight largest regions. In the first half year of 2012 Tomsk region hit the eight largest regions by products of kitchen furniture, while Moscow left the list. At that share of production in Tomsk region amounted to 5,*%.

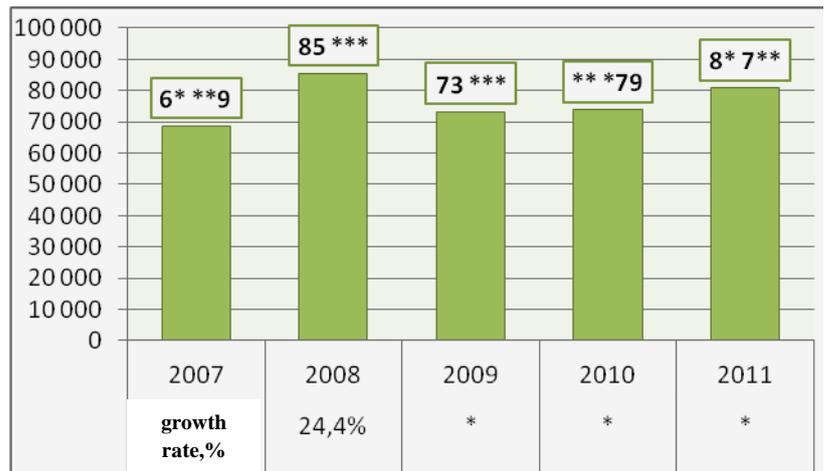
CHAPTER 13

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Volume of import furniture in cost terms grew by *,4% in 2011 compared with 2010 and amounted to 8*,7 mln dollars.

Cost of imports was growing since 2010, when its volume amounted to **, * mln dollars, that is by *,8% more than the rate of 2009. Decline in import volumes was observed in 2009, when its volume reduced by **,2% compared with the previous year. It is explained by a sales slowdown during the crisis year.

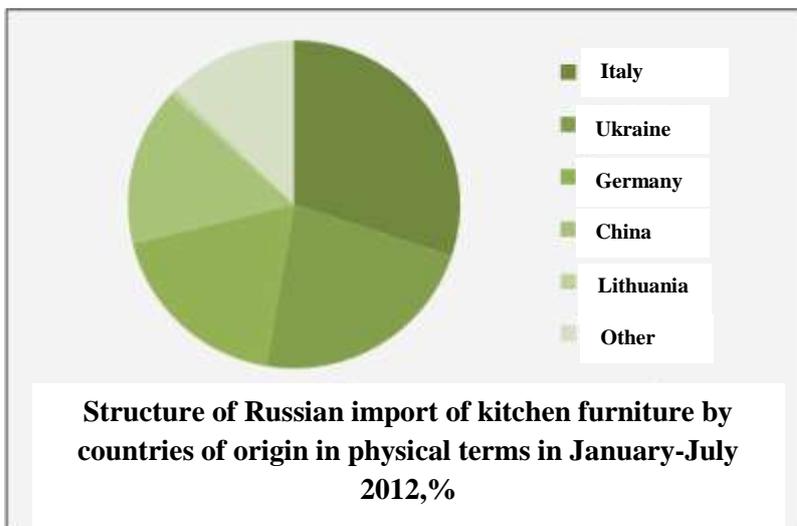
As a whole, import volume both in physical and cost terms exceeds the level of the pre-crisis year of 2007.



Dynamics of Russian import of kitchen furniture in 2007 – 2011 ths dollars

In January – July 2012 import volume of kitchen furniture from Italy amounted to **,1% of the

total Russian import of kitchen furniture. **,6% of products were imported from Ukraine, **,5% - from Germany. While the share of China was equal to **,6% in the structure of import. Import from other countries amounted to less than 1%. As a whole, four largest supplying countries provided Russia with about **% of Russian import of kitchen furniture.



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ths rubles

Table 68. Financials of Pervaya Mebelnaya Fabrika, CJSC

18. FORECAST FOR DEVELOPMENT OF MARKET OF KITCHEN FURNITURE FOR 2012 - 2015

Diagram 36. Dynamics of volume of Russian market of kitchen furniture in 2009- 2011 and forecast for 2011-2015, mln rubles.

Diagram 37. Dynamics of import share on the market of kitchen furniture in cost terms in 2009 - 2015*, %

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.

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OUR CLIENTS



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