



**Intesco
Research
Group**

MEAT AND MEAT MARKET



MOSCOW 2014

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

MARKET OF MEAT

Purpose of research:

EVALUATION OF THE MARKET STATE AND FORECAST FOR ITS DEVELOPMENT
FOR 2014-2016

Region of research:

RUSSIA AND REGIONS OF THE RF

Main blocks of research:

THE WORLD MARKET OF MEAT МИРОВОЙ РЫНОК МЯСА
ANALYSIS OF RETAIL SLAES ON THE MARKET OF MEAT
VOLUME OF THE RUSSIAN MARKET OF MEAT
SEGMENTATION OF THE MARKET OF MEAT
TRENDS ON THE RUSSIAN MARKET OF MEAT
FACTORS AFFECTNG THE MARKET OF MEAT
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PROFILES OF THE LARGEST ENTERPRISES ON THE MARKET OF MEAT
FORECAST OF THE MARKET OF MEAT FOR 2014-2016

The largest Russian enterprises profiled:

“PTITSEKOMBINAT”, LLC
“CHELNY-BROILER”, LLC
“MIKOYANOVSKY MEAT PLANT”, CJSC

“VELIKOLUKSKY MEAT PLANT”, OJSC

“INVEST ALIYANS”, LLC

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

The Ministry of agriculture of the USA

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 84 schedules, 62 diagrams, 85 tables, 6 schemes and 1 figure.

EXTRACTS FROM RESEARCH

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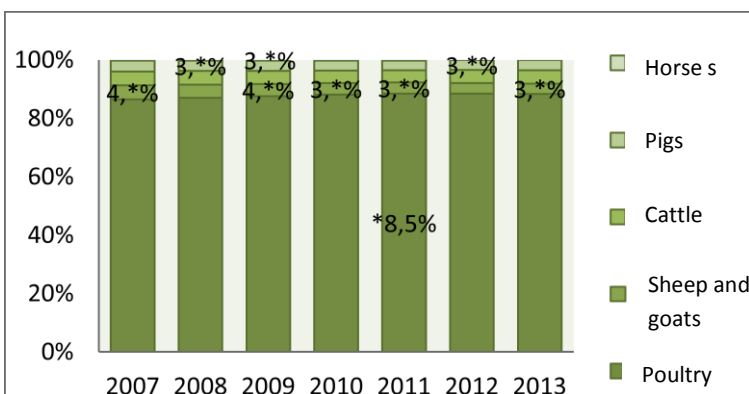
LIVESTOCK

Currently animal breeding in Russia is developing following modern world trends. Products of the branch should be competitive with imported products not only by quality but price as well. It should correspond veterinarian and sanitary requirements.

Cattle breeding and poultry breeding are the main branches of the agriculture of the RF, involved into growing of animals for slaughter.

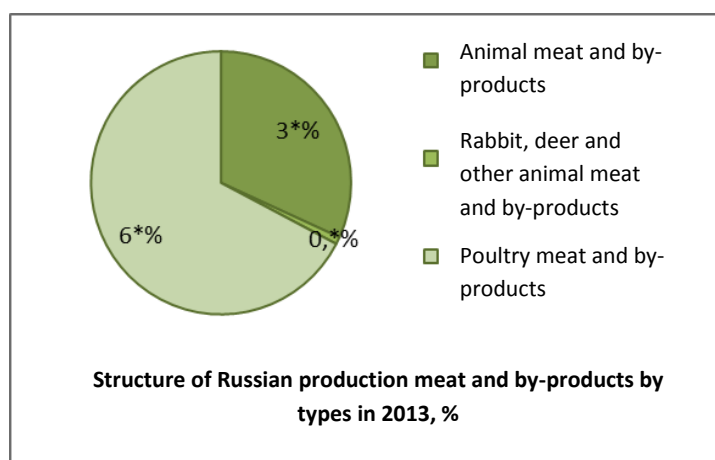
Number of animal heads is by types is distributed unevenly due to difference in periods of fattening.

Since 2007 reduction of share of cattle by all types of animals is caused not only by fluctuations of animals number during a calendar year, but mainly by constant increase of domestic poultry.



Structure of livestock of agricultural animals in RF in 2007-2013, %

The smallest share of horse number in the structure of agricultural animals for slaughter correlates with extreme natural climate conditions of horse breeding. The principle method of fattening of horses for slaughter, not worsening taste qualities of meat is pasture breeding which require large amount of land.



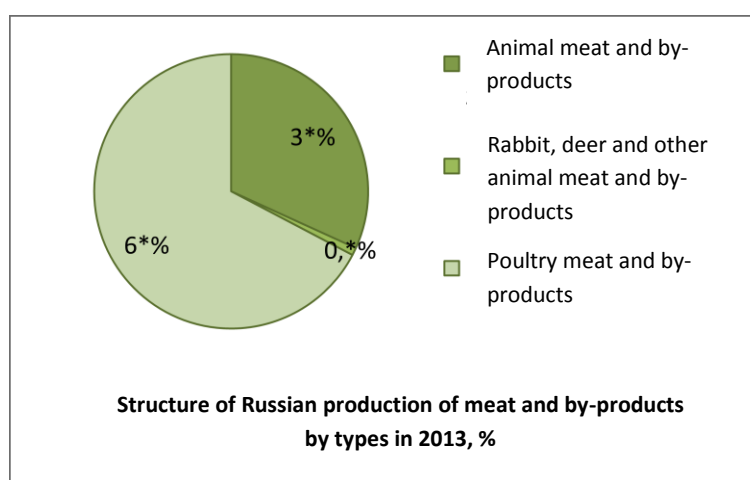
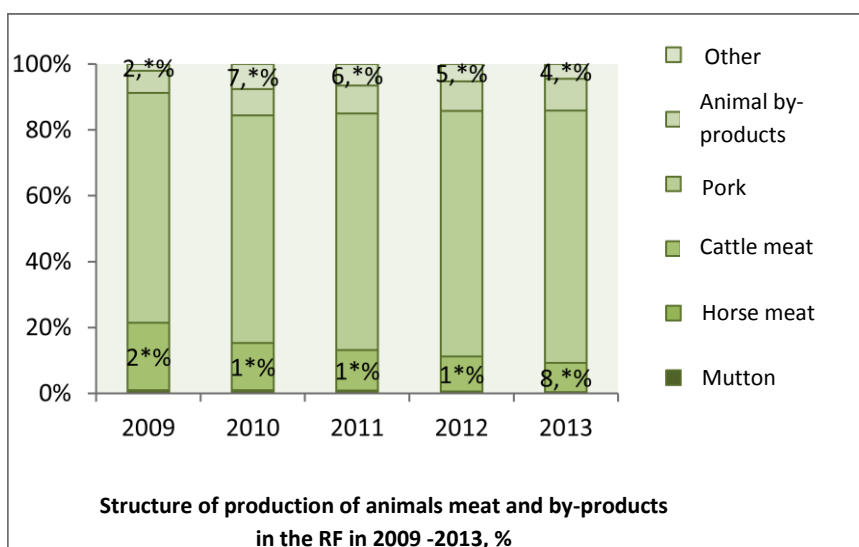
Structure of Russian production meat and by-products by types in 2013, %

CHAPTER 13

PRODUCTION OF MEAT

Products of Russian animals poultry breeding are fully sold on domestic market. By 2013 volume of national production of all types of meat in the RD did not satisfy national demand. Share of Russia amounted to 3.1% of world consumption of beef and veal, 1% of pork and 1% poultry meat. Due to own sector of animal and poultry breeding population's needs in cattle meat were satisfied by 100%, in pork - by 100%, in poultry meat - by 100%. Another part of products was filled up with import from Brazil, the USA, Argentina and other countries.

In 2013 the structure of Russian production of meat and offal was constituted by two thirds with products of poultry meat (66%), one third - by cattle and small cattle and pork (33%). Meat and offal of rabbits, hare, North deer, marmots and other animals.



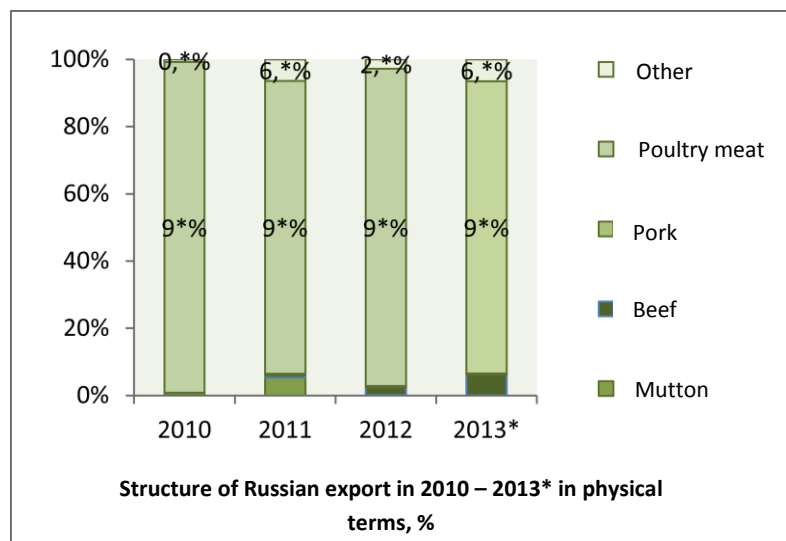
CHAPTER 15

EXPORT OF MEAT

Geography of Russian export is rather wide. The following are countries importing Russian products: Gabon, UAE, Republic of Korea, Laos, Spitzbergen, Panama, Republic of South Korea.

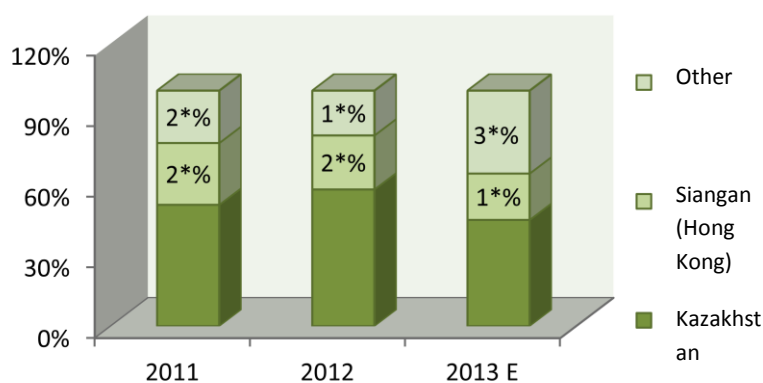
In 2010-2013* the following were exported from Russia to domestic markets of other countries: mutton, beef, animal offal, pork, animals by products, poultry meat and by-products. Share of mutton was insignificant, maximum deliveries of this meat were recorded in 2011 - *% of export

volume of the RF. Specific weight of beef grew by 2013* from * to * p.p. Pork meat was almost not exported from the country, it was consumed on the domestic market. By products of animals and also meat and by products of rabbits, deer and other animals are exported from the country in accordance to herd turnover, i.e. it fluctuates from * to * p.p. annually.



In 2013 the structure of Russian export (in physical terms) underwent re-allocation (against 2011),

shares of Kazakhstan and Hong Kong reduced (by * and * p.p. correspondingly), while share of other countries increased (by ** p.p.). These changes show the expansion of international trade geography of the RF.



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