



**Intesco
Research
Group**

RUSSIAN MARKET OF VODKA, LIQUERS AND SPIRITS



MOSCOW 2011

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METHODS OF RESEARCH

Subject of research:

MARKET OF VODKA, LIQUEURS AND SPIRITS

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2011-2012.

Regions of research:

RUSSIA AND RF REGIONS

Main blocks of research:

ANALYSIS OF VODKA, LIQUEURS AND SPIRITS RETAIL SALES
VOLUME OF STOCKS OF VODKA, LIQUEURS AND SPIRITS AT THE RETAIL SALES OUTLETS OF RUSSIA
PRODUCTION OF VODKA, LIQUEURS AND SPIRITS IN RUSSIA
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STATE REGULATION OF RUSSIAN VODKA, LIQUEURS AND SPIRITS MARKET
FORECAST OF THE RUSSIAN VODKA, LIQUEURS AND SPIRITS MARKET DEVELOPMENT IN 2011-2012.

Largest Russian companies with profiles:

«LIKYEROVODOCHNY ZAVOD «TOPAZ» JSC
«MOSKOVSKY ZAVOD «KRISTALL» JSC
«OMSKVINPROM» LLC
«TATSPIRTPROM» JSC
“BASHSPIRT” JSC

For the main companies the production volumes, financials of activity, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other data are 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 presents 59 schedules, 35 diagrams and 74 tables.

EXTRACTS FROM RESEARCH

CHAPTER 3

ANALYSIS OF RETAIL PRICES
FOR VODKA, LIQUEURS AND
SPIRITS

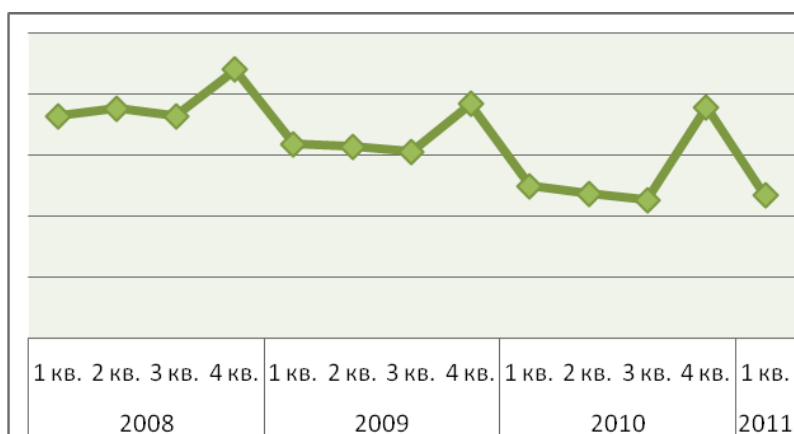
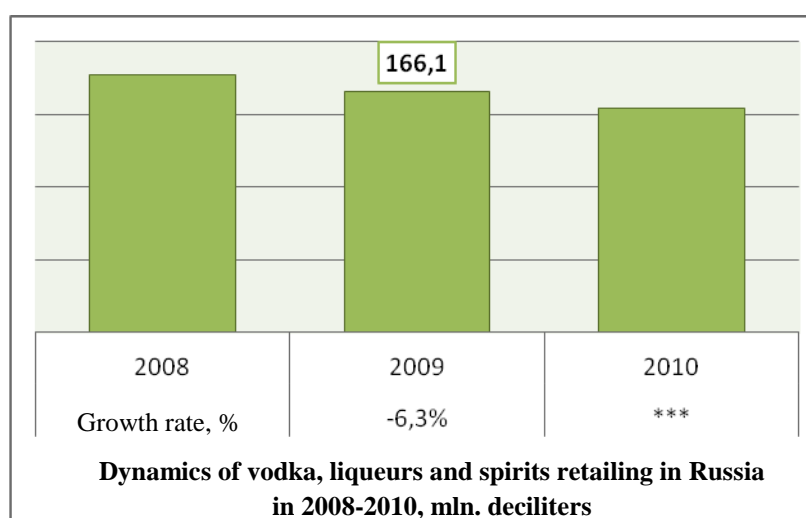
In the last years the volumes of retail sales of vodka, liqueurs and spirits in Russia tend to decrease. In 2009 the demand for the products reduced by *,3%, and the sales volume amounted to *** mln. decaliters.

In 2010 the volume of retail sales reduced by 7% more and reached 154,5 mln. decaliters.

Sales of alcohol in

Russia have seasonal nature. The traditional peak is observed in the forth quarter, when people buy alcohol for the New Year's holidays. In the first quarter the demand for alcohol usually falls off as compared to the last quarter of the previous year. A similar dynamics was observed also in the beginning of 2011.

In 2009-2010 the sales of vodka, liqueurs and spirits reduced almost in all the districts. The only exception was the North-Western Federal District, where in 2010 the sales of these products grew by ***%.



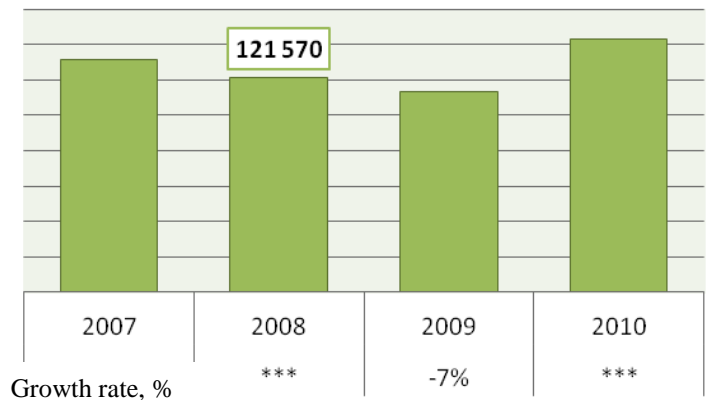
CHAPTER 7

PRODUCTION OF VODKA, LIQUEURS AND SPIRITS

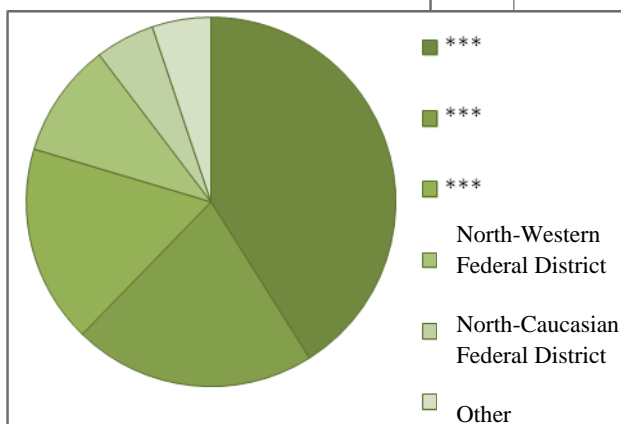
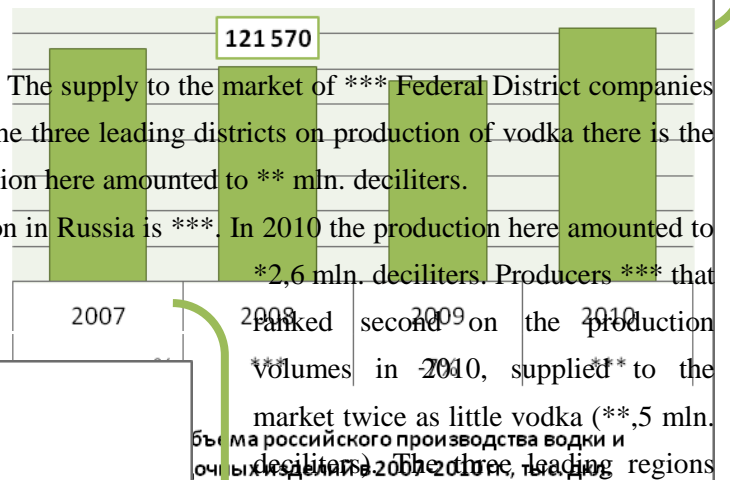
In 2007-2009 the production of vodka, liqueurs and spirits reduced. In 2008 this reduction amounted to **%, and in 2009 – 6,9%. In 2010, the dynamics shifted to a positive one and the production of these goods increased by *** as compared to 2009 and by **% as compared to the year 2007 before crisis.

The majority of all the vodka in Russia is produced in *** Federal District. In 2010 the production of this district amounted to *0,2 mln. deciliters of products. The supply to the market of *** Federal District companies almost halved (** mln. deciliters). Among the three leading districts on production of vodka there is the Siberian Federal District: in 2010 the production here amounted to ** mln. deciliters.

The largest region on vodka production in Russia is ***. In 2010 the production here amounted to *2,6 mln. deciliters. Producers *** that



Dynamics of the Russian vodka, liqueurs and spirits production volumes in 2007-2010, ths. deciliters



Structure of the Russian vodka production by federal districts in 2010, %

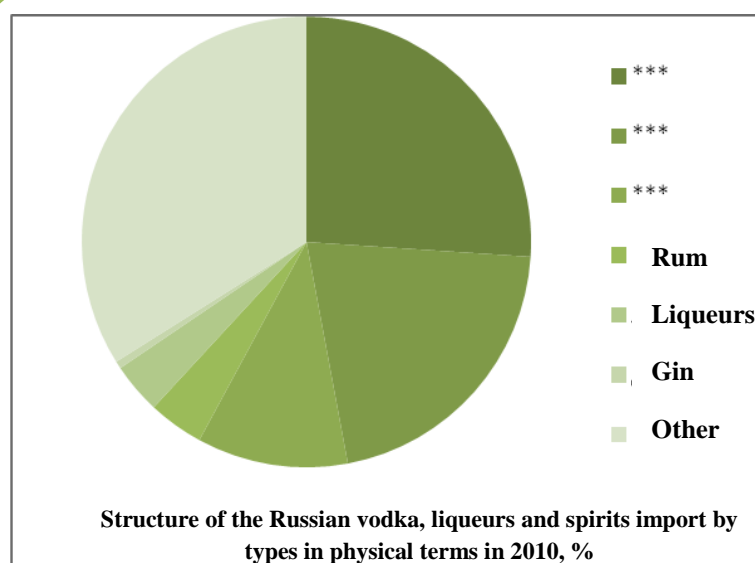
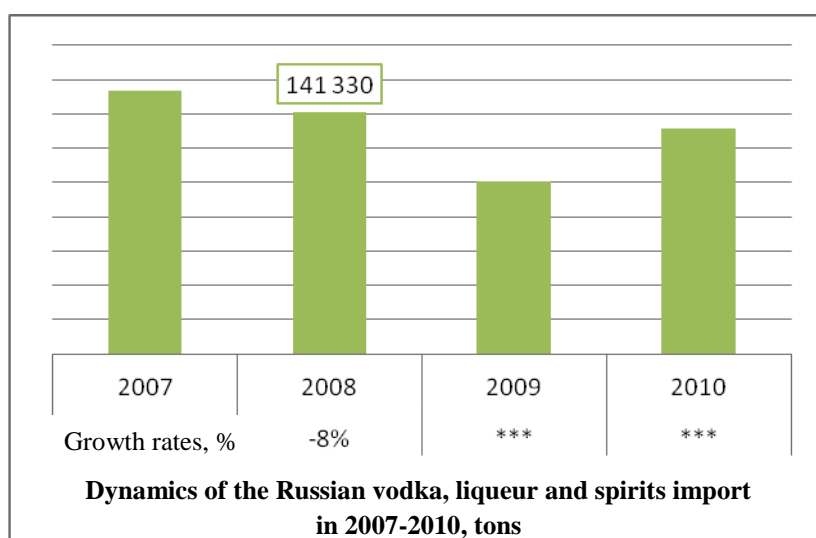
included also Omsk Region, where the production amounted to ** mln. deciliters. The list of the largest vodka producing regions in 2010 included also Tatarstan and St. Petersburg, where the production was equal to ** mln. decalimeters of products.

CHAPTER 9

ANALYSIS OF RUSSIAN IMPORT
OF VODKA, LIQUEURS AND
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Volume of vodka, liqueurs and spirits import to the territory of the Russian Federation reduced by *** during 2009, however, in 2010 the volumes of these products import restored, having expressed the growth of ***%. Total in 2010 the import of vodka, liqueurs and spirits to Russia from other countries amounted to *** ths. tons.

Aggregate cost of vodka, liqueurs and spirits imported to Russia in 2010 amounted to *** mln. USD.



***% of total alcoholic products import to Russia in 2010 accounted for ***. The share of *** amounted to ***%, *** – 11%. Rum and liqueurs held about 4% each in the structure of the Russian import of alcohol in physical terms. The content of imported gin was relatively small (0,5%).

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SEGMENTATION OF VODKA,
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Cheap vodka puts pressure on the popular brands with price from 120 to 150 rubles per bottle. The reason is not only in the decrease of the population's income, but also in excessively strong competition

in the mid-price segment, which misleads the customers. Under the conditions of decreasing sales only the most "historically deserved" brands have the best chances for the new popularity lift.

Mid-price segment for vodka from 120 to 150 rubles in many regions gives way to the cheapest vodka at a price of 89 rubles for 0,5 liter.

During the first quarter of this year the production in the cheapest segment

Rating of the most popular trade marks of vodka in Russia in 2010

Vodka mark	2010	Vodka mark	2009
***	***	***	***
***	14,3	***	12,9
***	11,6	***	12,2
Nemiroff	11,4	Absolut	10,6
***	10,9	***	9,6
Juravli	9,6	Russian Standard	9,4
Finlandia	8,2	Cristall	8,1
***	8	***	7,8
Khortytza	5,5	Pyat Ozer	7,3
Putinka	5,2	Myagkov	5,3

increased by ***%. At that, vodka costing more than 150 rubles holds today maximum ***% of the legal market volume, and vodka costing more than 200 rubles - *,7% of the legal market volume in 2009.

In 2010 the most popular brand of vodka was «***», in 2009 – «***». In general, the positions of brands are not marked by permanence, which means the preferences of population may change and the success of the companies' promotion policies too.

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18. FORECAST OF THE RUSSIAN VODKA, LIQUEURS AND SPIRITS MARKET DEVELOPMENT IN 2011-2013.

Schedule 59. Dynamics of the Russian vodka, liqueurs and spirits market volume development in 2007-2010 and forecast for 2011-2013, ths. deciliters.

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