



**Intesco  
Research  
Group**

# JUICES AND NECTARS. RUSSIAN MARKET OF JUICES AND NECTARS - FORECAST FOR 2013 - 2016



MOSCOW 2013

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### ABOUT INTESCO RESEARCH GROUP

## RESEARCH METHODOLOGY

**Subject of research:**

MARKET OF FRUIT AND VEGETABLE JUICES AND NECTARS

**Goal of research:**

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS  
DEVELOPMENT FOR 2013-2016

**Regions of research:**

RUSSIA AND REGIONS OF RF

**Basic units of research:**

WORLD MARKET OF JUICES AND NECTARS  
ANALYSIS OF RETAIL SALES OF SOFT DRINKS  
ANALYSIS OF WHOLESALSALES OF SOFT DRINKS  
VOLUME OF RUSSIAN MARKET OF JUICES AND NECTARS  
TRENDS ON THE MARKET OF JUICES AND NECTARS  
FACTORS AFFECTING THE MARKET OF JUICES AND NECTARS  
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**The largest Russian enterprises profiled:**

“WIMM-BILL-DANN”, OJSC

“NIDAN-GROSS”, LLC

“LEBEDYANSKIY”, OJSC

“SADY PRIDONIA”, OJSC

“PROGRESS”, OJSC

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 139 Schedules, 117 Diagrams, 159 Tables, 1 Scheme**

## EXTRACTS FROM THE RESEARCH

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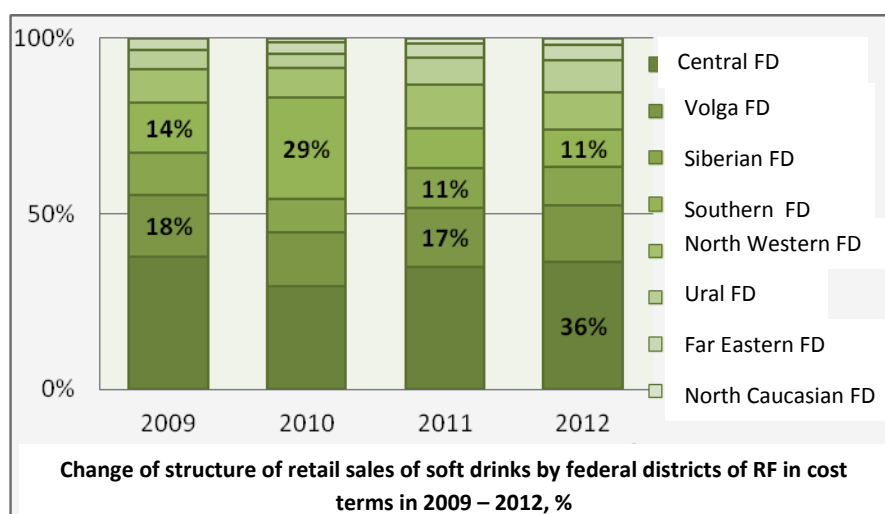
ANALYSIS OF RETAIL SALES OF  
SOFT DRINKS

In 2012 retail sales of soft drinks reached \*\*\*,1 bln. rubles. This is by 1\*,5% more than in the previous year, when sales of products just slightly exceeded the rates of 2010.

In its turn, the post-crisis 2010 was marked by high increase rate by \*5,5%. Sales growth was provided by both growing prices for beverages and increase of volumes of products selling. During the crisis prices for juice concentrates grew significantly, while cost for juices and nectars grew due to rising of costs for raw materials.

According to the results of 2012, share of Central FD in 2012 was equal to 36% of the gross proceeds from retail sales of soft drinks. Volga region provided 16% of retail. Shares of North-Western, Southern and Siberian districts amounted to 11% each.

In 2009 – 2012 structure of retail sales of soft drinks was changing: in 2010 share of Central FD



reduced appreciably (by \*\* p.p.), at that share of Southern FD was equal to share of CFD and amounted to \*\*%. At the same time in 2009 share of Southern FD (together with North-Caucasian) was equal to 1\*%.

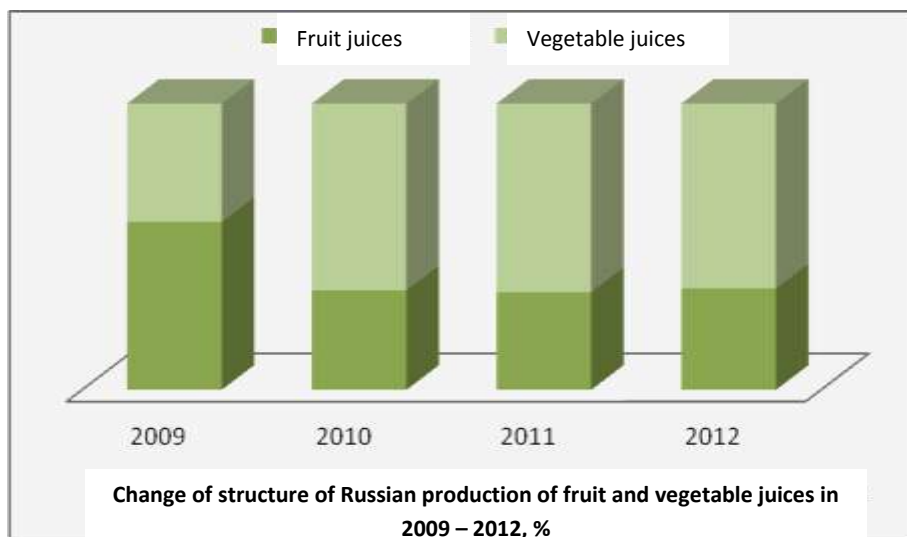
Shares of other districts in 2010 reduced by 1-3 p.p. in 2011 retail sales in Southern FD decreased; its share reduced by \*\*\*.

**CHAPTER 14*****PRODUCTION OF FRUIT AND  
VEGETABLE JUICES***

During 2007 – 2009 production of fruit and vegetable juices (baby juices not included) reduced significantly in Russia. If in 2006 \*\*\*,4 mln. nominal packs of products were manufactured, by 2009 this rate was twice less. Domestic production of juices depends much on import of foreign concentrated juice products. In 2008 – 2009 import volumes were characterized by negative dynamics; at that increase rates themselves were decreasing gradually.

Within the period researched the minimum was marked in 2011 – 2 668 mln. nominal packs of fruit and vegetables juices, that is by 12,3% less than production in the previous year. Positive trend was outlined only in the past 2012, when Russian manufacturers supplied the market with 2 989,6 mln. nominal packs of the product.

In 2009 more than \*\*% of juice production, baby juices and nectars excluding, was focused on fruit juices output. For 2010-2011 share of vegetable juices started increasing and reached \*\*,2%, however in 2012 due to higher increase rates in the segment of fruit juices, their presence consolidated again by 0,3 p.p. in comparison with 2011.





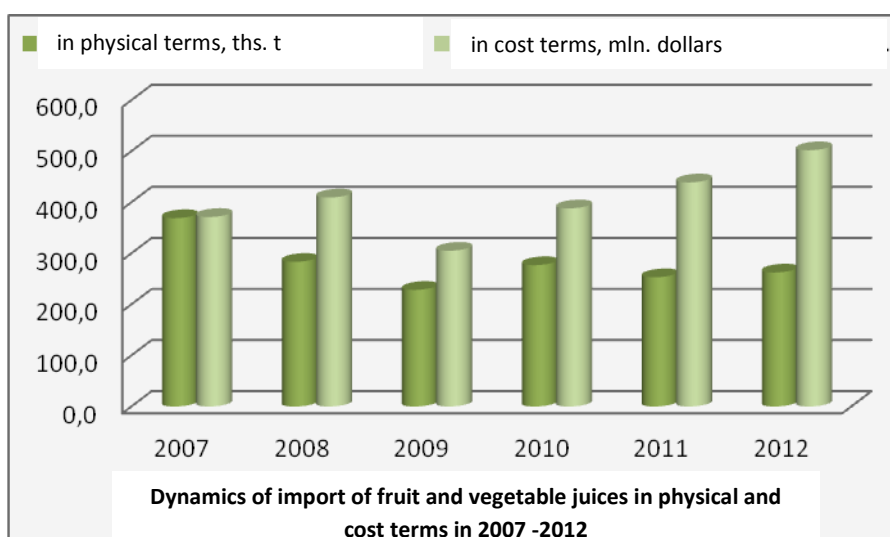
**CHAPTER 17****ANALYSIS OF RUSSIAN IMPORT  
OF JUICES**

In 2012 \*\*\*,5 ths. tons of fruit and vegetable juices, worth a total of \*\*\* mln. dollars, were delivered to Russian market. It should be noted, if in 2011 in physical terms deliveries volume reduced by 17%, in cost terms rates kept growing (+13%) in the same year.

Mainly concentrated juice products are imported on Russian market. Despite Russian production of apple juice is mainly based on domestic raw materials, a part of concentrates are also to be bought in other countries.

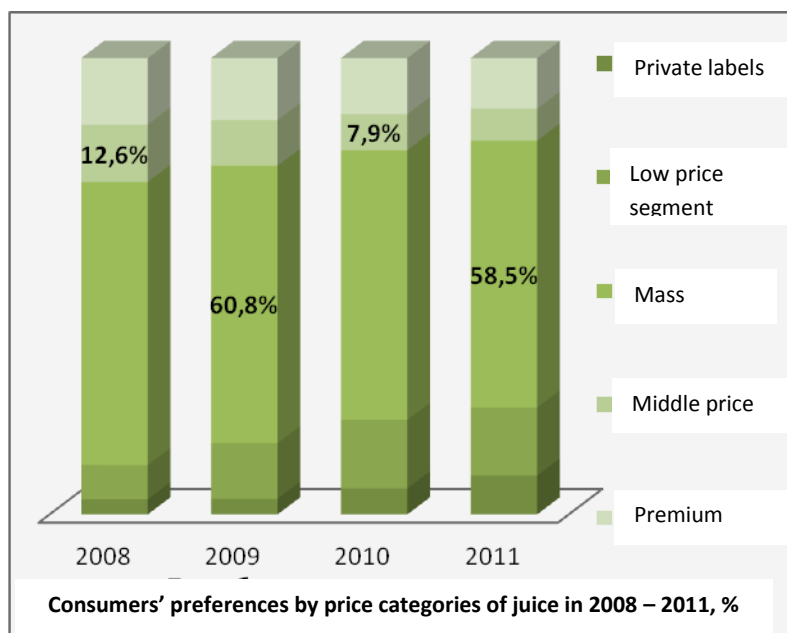
The largest categories of products imported by Russia are apple and orange juices. The sections below contain information volumes of fruit and berries juices with different degree Brix reflecting product's concentration degree.

As for fruit juices with Brix lower than 20 (lower than 30 – for grape juice), grapefruit and other citrus juices (except for orange) are imported in almost equal volumes. In 2012 1 \*\*\* and 1 \*\*\*\* tons were imported correspondingly. 6 301 tons and 6 629 tons of apple and orange juices were imported correspondingly. Two last categories were marked by increase of deliveries volumes by 20,4% and 14,1%.



## CHAPTER 22

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During the last two years a trend to reduction of premium juices is observed, while consumption of low-budget products is on the contrary growing.

In 2011 the mass and the lowest price segments constituted \*0% of the market. Buying juices of these segments makes those Russia citizens who could not afford juices due to

financial reasons a part of juices consumers.

In 2011 in the structure of preferences share of premium products took only 1\*,1%, while private trade marks - \*,5%. Brands Private label becomes more and more popular due to low price (27,5 rub/l at an average) and also growing number of stores of "discounter" type and neighboring stores, where PLs constitute a significant part of assortment. According to the experts' estimations, share of Private labelled products grew from \*,9% in 2011 to \*,3% in 2012 on the market of juices.

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## ABOUT INTESCO RESEARCH GROUP



## ABOUT INTESCO RESEARCH GROUP COMPANY

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