



**Intesco
Research
Group**

TEA AND TEA MARKET



MOSCOW 2014

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	8
EXTRACTS FROM RESEARCH.....	10
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES.....	13
ABOUTINTESCO RESEARCH GROUP	22

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Number of population

Largest cities

Social standards of living dynamics

Economic activity

1.2. Economic situation

Dynamics of economy development

Stability of the state budget

1.3. Position of Russia in the world

Share of RF in the world population

2. SUBJECT OF RESEARCH

2.1. Tea characteristics

2.2. Tea production process

2.3. Methods of tea classification

Tea classification by ARCP

Tea classification by FEA CN

Tea classification by ARCPEA

3. WORLD TEA MARKET

3.1. Tea production in the world

Production dynamics by years

Largest countries producing tea

3.2. Tea export in the world

Dynamics by years

Supplies volumes by countries

3.3. Tea import in the world

Dynamics by years

Supplies volumes by countries

4. ANALYSIS OF TEA RETAIL SALES

4.1. Dynamics of retail sales by years

4.2. Dynamics of retail sales by quarters

4.3. Retail sales by subjects of RF

4.4. Structure of retail sales by federal districts and regions

5. VOLUME OF RUSSIAN TEA MARKET

- 5.1.Dynamics of market volume by years
- 5.2.Dynamics of import content on the market
- 5.3.Market structure by types
- 5.4.Tea in packages weighing over 3 kg

Dynamics of market volume by years

Import content on the market

Dynamics of import content on the market

- 5.5.Volume of weighed tea market
- 5.6.Tea consumption on the market

6. SEGMENTATION OF RUSSIAN TEA MARKET

7. TRENDS ON RUSSIAN TEA MARKET

- 7.1.General trends on food products market and every day demand goods
- 7.2.Trends of tea consumption
- 7.3.Producers activity

8. STATE REGULATIONS OF RUSSIAN TEA MARKET

- 8.1.Regional programs of the industry support
- 8.2.Participation of Russia in WTO

9. LARGEST PLAYERS ON RUSSIAN TEA MARKET

9.1.Orimi Trade

Reference information **Ошибка! Закладка не определена.**

Company development history

Range of products and brands

9.2.Ahmad Tea Ltd

Reference information

Company development history

Range of products and brands

9.3.«May» Company» JSC

Reference information

Company development history

Range of products and brands

9.4.«Sapsan» group of tea companies

Reference information

Company development history

Range of products and brands

9.5.«Unilever Rus» LLC

Reference information

Company development history

Range of products and brands

10. TEA PRODUCTION IN RUSSIA

- 10.1. Production structure by types
- 10.2. Dynamics of production volume by years
- 10.3. Dynamics of production volume by months
- 10.4. Production volumes by federal districts of RF
- 10.5. Production structure by federal districts of RF
- 10.6. Production volumes by regions
- 10.7. Production structure by regions

11. LARGEST RUSSIAN TEA PRODUCERS

- 11.1. By production volumes (up to 2009)
- 11.2. By sale revenues (up to 2012)

12. ANALYSIS OF RUSSIAN TEA EXPORT

- 12.1. Tea in general
 - Dynamics of export volumes by years*
 - Dynamics of export volumes by months*
 - Export structure by categories*
 - Export volume by countries of destination*
 - Export structure by countries of destination*
- 12.2. Black tea in immediate packages with weight over 3 kg
 - Dynamics of export volumes by years*
 - Export volumes by countries of destination*
 - Export structure by countries of destination*
- 12.3. Green tea in immediate packages with weight over 3 kg
 - Dynamics of export volumes by years*
 - Export volumes by countries of destination*
 - Export structure by countries of destination*

13. ANALYSIS OF RUSSIAN TEA IMPORT (IN GENERAL)

- 13.1. Import in general
 - Dynamics of import volumes by years*
 - Dynamics of import volumes by months*
 - Import structure by categories*
- 13.2. Other black tea
 - Dynamics of import volumes by years*
 - Import volumes by supplying countries*
 - Import structure by supplying countries*
 - Import structure by producing companies*
 - Import structure by trademarks*
- 13.3. Black tea in immediate packages with weight over 3 kg
 - Dynamics of import volumes by years*
 - Import volumes by supplying countries*

Import structure by supplying countries

Volumes of import by trademarks

13.4. Other green tea

Dynamics of import volumes by years

Import volumes by supplying countries

Import structure by supplying countries

Import volumes by trademarks

13.5. Green tea in immediate packages with weight over 3 kg

Dynamics of import volumes by years

Import volumes by supplying countries

Import volumes by trademarks

14. RUSSIAN PRODUCER PRICES FOR TEA

14.1. Dynamics of prices by years

14.2. Dynamics of prices by months

15. RETAIL PRICES FOR TEA IN RUSSIA

15.1. Pekoe black tea

Dynamics of prices by years

Dynamics of prices by months

15.2. Palletized pekoe black tea

Dynamics of prices by years

Dynamics of prices by months

15.3. Factors influencing the final price

16. CONSUMER PREFERENCES ON RUSSIAN TEA MARKET

16.1. Peculiarities of tea advertising

16.2. Brands rating

17. PROFILES OF LARGEST ENTERPRISES

17.1. «NEVSKIE POROGI» LLC

Reference information

Types of activity

Production volumes (up to 2009)

Balance sheet

Profit and loss statement

Cash flow statement

Financials

17.2. «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC

Reference information

Types of activity

Production volumes (up to 2009)

Balance sheet

Profit and loss statement

Cash flow statement

Financials

17.3.«AKHMAD TEA» FACTORY» LLC

Reference information

Types of activity

Production volumes (up to 2009)

Balance sheet

Profit and loss statement

Cash flow statement

Financials

17.4.«KUBAN TEA» LLC **Ошибка! Закладка не определена.**

Reference information

Types of activity

Balance sheet

Profit and loss statement

Cash flow statement

Financials

17.5.«MAY» COMPANY» JSC

Reference information

Types of activity

Production volumes (up to 2009)

Balance sheet

Profit and loss statement

Cash flow statement

Financials

18. FORECAST OF RUSSIAN TEA MARKET

18.1.Russian tea market (in general)

Dynamics of market volume by years

Forecast of consumption level

18.2.Weighed tea market

18.3.Tea in packages up to 3 kg market

Dynamics of market volume by years

Forecast of physical and cost market volumes

Dynamics of import content

Forecast of consumption level

ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

TEA MARKET

Goal of research:

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

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

SUBJECT OF RESEARCH

WORLD TEA MARKET

ANALYSIS OF TEA RETAIL SALES

VOLUME OF RUSSIAN TEA MARKET

SEGMENTATION OF RUSSIAN TEA MARKET

TRENDS ON RUSSIAN TEA MARKET

STATE REGULATIONS OF RUSSIAN TEA MARKET

LARGEST PLAYERS ON RUSSIAN TEA MARKET

TEA PRODUCTION IN RUSSIA

LARGEST RUSSIAN TEA PRODUCERS

ANALYSIS OF RUSSIAN TEA EXPORT

ANALYSIS OF RUSSIAN TEA IMPORT (IN GENERAL)

RUSSIAN PRODUCER PRICES FOR TEA

RETAIL PRICES FOR TEA IN RUSSIA

CONSUMER PREFERENCES ON RUSSIAN TEA MARKET

FORECAST OF RUSSIAN TEA MARKET

Largest Russian enterprises with profiles:

«NEVSKIE POROGI» LLC

«YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC

«AKHMAD TEA» FACTORY» LLC

«KUBAN TEA» LLC

«MAY» COMPANY» JSC

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

Ministry of Economic Development of RF

Federal Customs 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 59 schedules, 51 diagrams and 78 schemes.

EXTRACTS FROM RESEARCH

CHAPTER 10

TEA PRODUCTION IN RUSSIA

Tea production dynamics in Russia is characterized by growth, besides 2008 and 2009 when volumes of tea production decreased by ** ths tons during two years as a result of the world economy crisis. Since 2010 dynamics stabilized again with rate growth of **% and increase of production to 105 ths tons. In 2011-2013 volume of tea production increased with low, but increasing growth rates, and by the end of 2013 reached *** ths tons.

The main consumed types of tea are *** tea. Black tea is the most popular, and volumes of its production several times exceed volumes of green tea production. According to estimated data for 2013, the share of black pekoe tea in the structure of tea production by types made**%, and the share of green – ** part of total structure. The share of other types of tea made only*%.

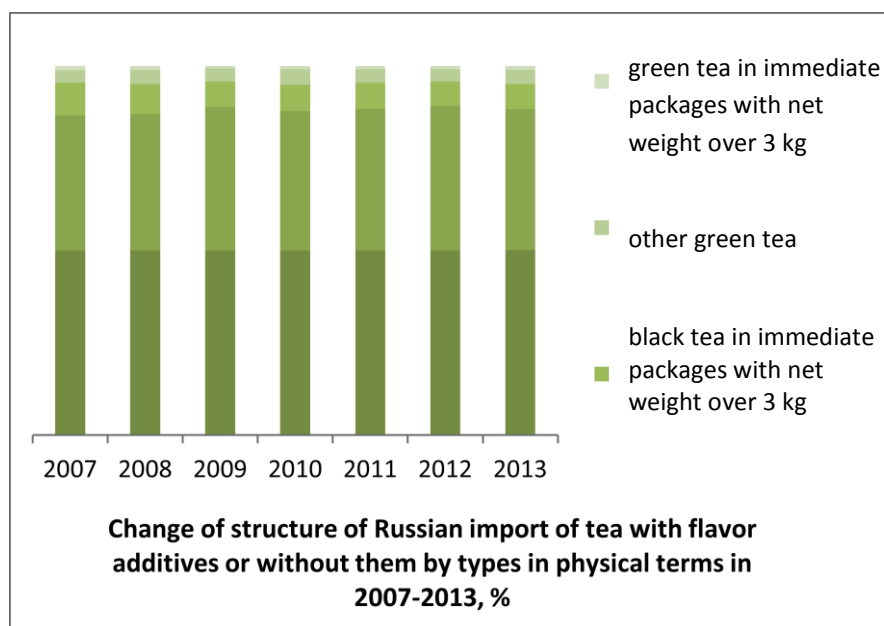
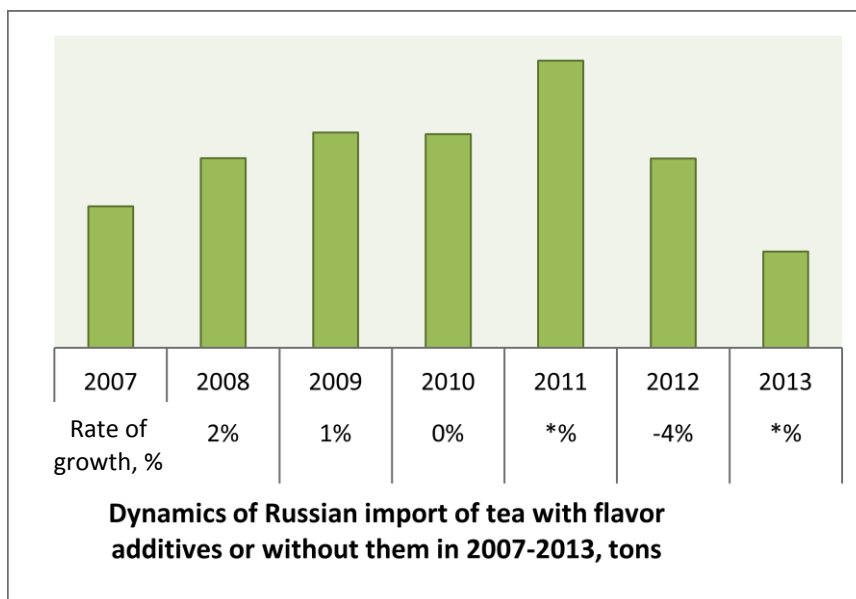
Largest volumes of tea production in Russia in 2013 were provided by enterprises of North Western FD, shares of which in total production structure amounted to 62%



CHAPTER 13

ANALYSIS OF RUSSIAN TEA
IMPORT (IN GENERAL)

During 2009-2013 volume of Russian import remained at the level of about *** ths tons with small growth rates. So, in 2009-2010 annual import volume made 182 ths tons. In 2011 import increased by 3% or 5,6 ths tons, in connection with a lack of own production. Since 2012 tendency of tea import volume lowering was marked. In 2013 import volume decreased by 4%



compared to the previous year – to 172,7 ths tons. The largest category of tea imported by Russia, in 2009-2013 was *** tea which in 2013 made - ** %.

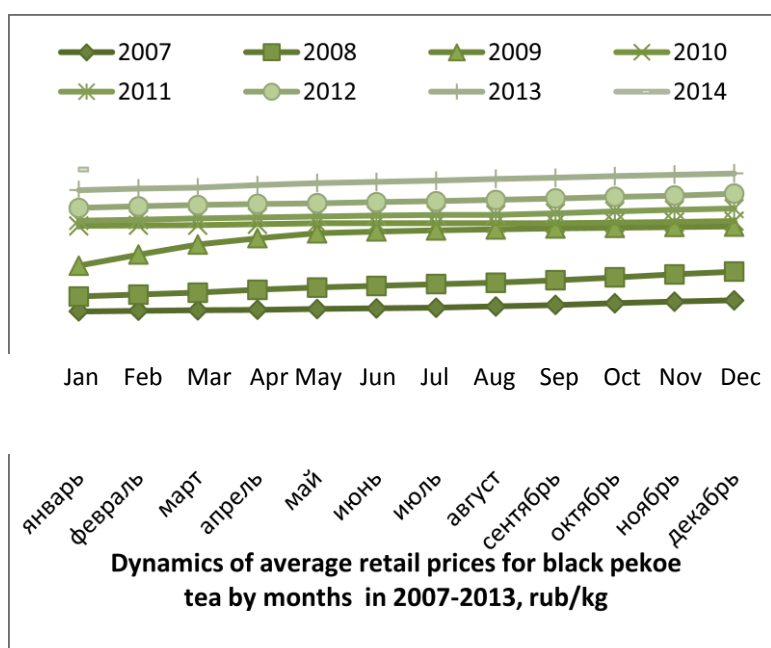
CHAPTER 15

RETAIL PRICES FOR TEA IN
RUSSIA

Average retail prices for black pekoe tea in 2007-2013 increased steadily. In general during the period prices increased almost two times – from **,2 rub/kg to *10 rub/kg in 2013.

In January 2014 average retail prices for black pekoe tea amounted to **,9 rub/kg, that was 8% more than in the same month of the previous year. It should be marked that it was the maximum for the surveyed period.

The pacing factor influencing the price for tea lies in macroeconomic situation. It is connected to a high import dependence of raw materials from domestic tea production: in Russia tea is grown only in Krasnodar Territory and makes less than 1% of raw materials for production of end products.



LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Dynamics of resident population number of Russia in 1990, 2000, 2005 and 2008-2012, ths people

Schedule 2. Dynamics of population of Russia in three forecast variants in 2011-2031, ths people

Diagram 1. Structure of population of Russia by working age in 2011-2031, % (average forecast variant)

Table 1. Population number of the largest cities of Russia according to All-Russian census of 2002 and 2010 and as for January 1, 2013, ths people

Schedule 3. Dynamics of actual household disposable income of population and annual rate of growth in 2000-2012, %

Schedule 4. Dynamics of demographic load coefficient in three forecast variants in 2011-2031

Diagram 2. Dynamics of the number of employed and unemployed people in Russia in 2000-2012 and forecast for 2013-2015, mln people

Schedule 5. Dynamics of share of the unemployed in economically active population by federal districts of RF in 2006-2012, %

Schedule 6. Dynamics of GDP of Russia in prices of 2008 in 2002-2012 and forecast for 2013-2015, billion rubles

Schedule 7. Investments into the fixed capital of RF in 2002-2012 and forecast for 2013-2015, billion rubles

Schedule 8. Dynamics of surplus/deficit of consolidated budget of RF in 2006-2012, % of GDP

Schedule 9. Dynamics of total external debt of RF and its share in GDP in 2009-2013 (as for 1 January), mln dollars

Diagram 3. Change of structure of external debt of RF in 2009-2013 (as for 1 January), %

Schedule 10. Dynamics of CPI in 2006-2012 and forecast for 2013-2015, % to the corresponding period of the previous year

Schedule 11. Dynamics of population of Russia and world in 2000-2012 and forecast up to 2100, mln people

Schedule 12. Share of RF in the world GDP in 2001-2012 and forecast for 2013-2016, %

2. SUBJECT OF RESEARCH

3. WORLD TEA MARKET

Schedule 13. Dynamics of world tea production in 2007-2013, tons

Table 2. Rating of countries by tea production volumes in 2009-2012, tons

Diagram 4. Structure of world tea production by countries in 2013*, %

Schedule 14. Dynamics of world tea export volumes in physical and cost terms in 2007-2013*

Table 3. TOP-20 countries by tea export volumes in physical terms in 2007-2012, tons

Table 4. TOP-20 countries by tea export volumes in cost terms in 2007-2012, ths dollars

Schedule 15. Dynamics of world tea import volumes in physical and cost terms in 2007-2013*

Table 5. TOP-20 countries by tea import volumes in physical terms in 2007-2012, tons

Table 6. TOP-20 countries by tea import volumes in cost terms in 2007-2012, ths dollars

4. ANALYSIS OF TEA RETAIL SALES

Schedule 16. Dynamics of tea retail sales by years in 2009-2013, ths rubles

Schedule 17. Dynamics of tea retail sales by quarters in 2009-2013, ths rubles

Table 7. Volume of tea retail sales by quarters in 2009-2013, ths rubles

Table 8. Volumes of tea retail sales by subjects in 2009-2013, ths rubles

Diagram 5. Change of structure of tea retail sales by federal district in 2009-2013, %

Diagram 6. Change of structure of tea retail sales by regions in 2009-2013, %

5. VOLUME OF RUSSIAN TEA MARKET

Schedule 18. Dynamics of Russian tea market in physical terms by years in 2007-2013, tons

Diagram 7. Dynamics of import content on Russian tea market in physical terms in 2007-2013, %

Diagram 8. Structure of Russian tea market in 2007-2013, %

Schedule 19. Dynamics Russian packed tea market volume in 2007-2013, tons

Schedule 20. Dynamics Russian packed tea market volume in cost terms in 2007-2013, ths dollars

Diagram 9. Import content on Russian market of packed tea in physical terms in 2013, %

Diagram 10. Dynamics of import content on Russian market of packed tea in physical terms in 2010-2013*, %

Schedule 21. Volume of weighed tea market in Russia in 2007-2013, tons

Schedule 22. Dynamics of tea consumption level in 2007-2013, kg/person

6. SEGMENTATION OF RUSSIAN TEA MARKET

Diagram 11. Segmentation of Russian tea market in physical terms in 2010-2013*, %

Table 9. Segmentation of Russian tea market in physical terms in 2010-2013*, tons

7. TRENDS ON RUSSIAN TEA MARKET

8. STATE REGULATIONS OF RUSSIAN TEA MARKET

Table 10. Change of customs duties for wine import in 2012 – 2016, %

9. LARGEST PLAYERS ON RUSSIAN TEA MARKET

10. TEA PRODUCTION IN RUSSIA

Diagram 12. Tea production structure by types in 2013, %

Diagram 13. Change of tea production structure by types in 2010-2012, %

Schedule 23. Dynamics of Russian tea production volume by years in 2007-2013, tons

Schedule 24. Dynamics of Russian tea production volume by months in 2009-2013, tons

Table 11. Volumes of tea production by federal district in 2010-2013, tons

Diagram 14. Dynamics of tea production volume by federal district in 2007-2013, tons

Diagram 15. Tea production structure by federal district in 2013, %

Diagram 16. Change of tea production structure by federal district in 2010-2012, %

Table 12. Volumes of tea production by regions in 2007-2013, tons

Diagram 17. Change of tea production structure by regions in 2007-2013, %

Diagram 18. Tea production structure by regions in 2013, %

11. LARGEST RUSSIAN TEA PRODUCERS

Table 13. Volumes of green tea production (non-fermented), black tea (fermented) and partially fermented tea, in packages with weight over 3 kg by the largest Russian producers in 2007-2009, tons

Diagram 19. Shares of the largest enterprises in the structure of all-Russian pekoe tea production in 2009, %

Diagram 20. Shares of the largest enterprises in the structure of all-Russian green pekoe tea production in 2009, %

Table 14. Largest enterprises by sales volume by the main type of activity «tea and coffee production» (15.86) in 2009-2012, ths rubles

Diagram 21. Change of structure of proceeds from sales from «tea and coffee production» activity (15.86) by largest enterprises in 2009-2012, %

Diagram 22. Structure of proceeds from sales from «tea and coffee production» activity (15.86) by largest enterprises in 2012, %

12. ANALYSIS OF RUSSIAN TEA EXPORT

Schedule 25. Dynamics of tea export volume in physical terms by years in 2007-2013*, tons

Schedule 26. Dynamics of tea export volume in cost terms by years in 2007-2013, ths dollars

Schedule 27. Dynamics of Russian tea export by months in physical terms in 2007-2013, tons

Table 15. Volumes of Russian tea export by months in physical terms in 2007-2013, tons

Schedule 28. Dynamics of Russian tea export by months in cost terms in 2007-2013, ths dollars

Table 16. Volumes of Russian tea export by months in cost terms in 2007-2013, ths dollars

Table 17. Volumes of tea export in physical terms in 2007-2013, tons

Diagram 23. Tea export structure by types in physical terms in 2013, %

Table 18. Volumes of tea export in cost terms in 2007-2013, ths dollars

Diagram 24. Tea export structure by types in cost terms in 2013, %

Table 19. Dynamics of tea export volume by countries of destination in physical terms in 2007-2013, tons

Table 20. Dynamics of tea export volume by countries of destination in cost terms in 2007-2013, ths dollars

Diagram 25. Change of structure of Russian tea export by countries of destination in physical terms in 2007-2013, %

Diagram 26. Structure of Russian tea export by countries of destination in physical terms in 2013, %

Diagram 27. Change of structure of Russian tea export by countries of destination in cost terms in 2007-2013, %

Diagram 28. Structure of Russian tea export by countries of destination in cost terms in 2013, %

Schedule 29. Dynamics of Russian export of black tea with flavor additives or without them, in immediate packages with net weight over 3 kg in physical terms in 2007-2013, tons

Schedule 30. Dynamics of Russian export of black tea with flavor additives or without them, in immediate packages with net weight over 3 kg in cost terms in 2007-2013, ths dollars

Table 21. Volumes of black tea export in physical terms by countries of destination in 2007-2013, tons

Table 22. Volumes of black tea export in cost terms by countries of destination in 2007-2013, ths dollars

Diagram 29. Change of structure of Russian export of black tea with flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in physical terms in 2007-2013, %

Diagram 30. Export structure of black tea with taste and flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in physical terms in 2013, %

Diagram 31. Change of structure of Russian export of black tea with flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in cost terms in 2007-2013, %

Diagram 32. Export structure of black tea with taste and flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in cost terms in 2013, %

Schedule 31. Dynamics of Russian export of green tea with flavor additives or without them, in immediate packages with net weight over 3 kg in physical terms in 2007-2013, tons

Schedule 32. Dynamics of Russian export of green tea with flavor additives or without them, in immediate packages with net weight over 3 kg in cost terms in 2007-2013, ths dollars

Table 23. Volumes of green tea export in physical terms by countries of destination in 2007-2013, tons

Table 24. Volumes of green tea export in cost terms by countries of destination in 2007-2013, ths dollars

Diagram 33. Change of structure of Russian export of green tea with flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in physical terms in 2007-2013, %

Diagram 34. Structure of Russian export of green tea with flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in physical terms in 2013, %

Diagram 35. Change of structure of Russian export of green tea with flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in cost terms in 2007-2013, %

Diagram 36. Structure of Russian export of green tea with flavor additives or without them, in immediate packages with net weight over 3 kg by countries of destination in cost terms in 2013, %

13. ANALYSIS OF RUSSIAN TEA IMPORT (IN GENERAL)

Schedule 33. Dynamics of Russian import of tea with flavor additives or without them in 2007-2013, tons

Schedule 34. Dynamics of Russian import of tea with flavor additives or without them in 2007-2013, ths dollars

Schedule 35. Dynamics of Russian tea import in physical terms by months in 2007-2013, tons

Table 25. Volumes of Russian tea import in physical terms by months in 2007-2013, tons

Schedule 36. Dynamics of tea import volume in cost terms by months in 2007-2013, ths dollars

Table 26. Volumes of Russian tea import in cost terms by months in 2007-2013, ths dollars

Table 27. Volumes of tea import in physical terms in 2007-2013, tons

Diagram 37. Change of structure of Russian import of tea with flavor additives or without them by types in physical terms in 2007-2013, %

Table 28. Volumes of tea import in cost terms in 2007-2013, ths dollars

Diagram 38. Change of structure of Russian import of tea with flavor additives or without them by types in cost terms in 2007-2013, %

Schedule 37. Dynamics of other Russian black tea import in 2007-2013, tons

Schedule 38. Dynamics of other Russian black tea import in 2007-2013, ths dollars

Table 29. Volumes of other black tea import in physical terms by supplying countries in 2009-2012, tons

Table 30. Volumes of other black tea import in cost terms by supplying countries in 2009-2012, ths dollars

Diagram 39. Change of structure of other Russian black tea import by countries of origin in physical terms in 2007-2013, %

Diagram 40. Structure of other Russian black tea import by countries of origin in physical terms in 2013, %

Diagram 41. Change of structure of other Russian black tea import by countries of origin in cost terms in 2007-2013, %

Diagram 42. Structure of other Russian black tea import by countries of origin in cost terms in 2013, %

Table 31. Volumes of Russian import of other black tea by the largest producing companies in 2012, tons

Diagram 43. Structure of Russian import of other black tea by the largest producing companies in 2012, %

Table 32. TOP-20 of largest imported brands of other black tea in 2013

Diagram 44. Import structure of other tea by largest brands in 2013, %

Schedule 39. Dynamics of Russian black tea import in immediate packages with net weight over 3 kg in 2007-2013, tons

Schedule 40. Dynamics of Russian black tea import in immediate packages with net weight over 3 kg in 2007-2013, ths dollars

Table 33. Import volumes black tea in immediate packages with weight over 3 kg in physical terms by supplying countries in 2007-2013, tons

Table 34. Import volumes black tea in packages with weight over 3 kg in cost terms by supplying countries in 2007-2013, ths dollars

Diagram 45. Change of structure of Russian black tea import in immediate packages with net weight over 3 kg by countries of origin in physical terms in 2007-2013, %

Diagram 46. Change of structure of Russian black tea import in immediate packages with net weight over 3 kg by countries of origin in cost terms in 2007-2013, %

Table 35. TOP-20 of largest imported brands black tea in immediate packages with net weight over 3 kg in 2013

Diagram 47. Structure of Russian black tea import in immediate packages with net weight over 3 kg by brands in 2013, %

Schedule 41. Dynamics of Russian other green tea import in 2007-2013, tons

Schedule 42. Dynamics of Russian other green tea import in 2007-2013, ths dollars

Table 36. Volumes of other green tea import in physical terms by supplying countries in 2007-2013, tons

Table 37. Volumes of other green tea import in cost terms by supplying countries in 2009-2012, ths dollars

Diagram 48. Change of structure of Russian other green tea import by countries of origin in physical terms in 2007-2013, %

Diagram 49. Change of structure of Russian other green tea import by countries of origin in cost terms in 2007-2013, %

Table 38. TOP-20 of largest imported brands of other green tea in 2013

Diagram 50. Structure of Russian other green tea import by brands in 2013, %

Schedule 43. Dynamics of Russian green tea import in immediate packages with net weight over 3 kg in 2007-2013, tons

Schedule 44. Dynamics of Russian green tea import in immediate packages with net weight over 3 kg in 2007-2013, ths dollars

Table 39. Volumes of green tea import in packages with weight over 3 kg in physical terms by supplying countries in 2009-2012, tons

Table 40. Volumes of green tea import in packages with weight over 3 kg in cost terms by supplying countries in 2007-2014, ths dollars

Table 41. TOP-20 of largest imported green tea brands in packages with weight over 3 kg in 2013

Diagram 51. Structure of Russian green tea import in immediate packages with net weight over 3 kg by brands in 2013, %

14. RUSSIAN PRODUCER PRICES FOR TEA

Schedule 45. Dynamics of average producer price for genuine tea - (grade) prepacked, by years in 2007-2013, rub/ton

Schedule 46. Dynamics of average producer price for genuine tea - (grade) prepacked, by months in 2007-February 2014, rub/ton

Table 42. Average producer prices for genuine tea (graded) packeted, by months in 2007-February 2014, rub/ton

15. RETAIL PRICES FOR TEA IN RUSSIA

Schedule 47. Dynamics of average retail prices for black pekoe tea by years in 2007-2013, rub/kg

Schedule 48. Dynamics of average retail prices for black pekoe tea by months in 2007-2013, rub/kg

Table 43. Average retail prices for black pekoe tea by months in 2007-January 2014, rub/kg

Schedule 49. Dynamics of average retail prices for black pekoe packeted tea by years in 2009-2013, rub/25 packs

Schedule 50. Dynamics of average retail prices for black pekoe packeted tea by months in 2009-2013, rub/25 packs

Table 44. Average retail prices for black pekoe packeted tea by months in 2009-January 2014, rub/25 packs

16. CONSUMER PREFERENCES ON RUSSIAN TEA MARKET

Schedule 51. Monthly tea advertizing distribution in catalogues in the first half of 2013

Table 45. Rating of «favorite» tea brands of Russians in 2011-2013

17. PROFILES OF LARGEST ENTERPRISES

Table 46. Shareholders/founders of «Nevskie porogi» LLC

Table 47. Subsidiaries of «Nevskie porogi» LLC

Table 48. Financials of «Nevskie porogi» LLC

Table 49. Balance sheet of «NEVSKIE POROGI» LLC, ths rubles

Table 50. Profit and loss statement of «NEVSKIE POROGI» LLC, ths rubles

Table 51. Cash flow statement of «NEVSKIE POROGI» LLC, ths rubles

Table 52. Dynamics of financials of «NEVSKIE POROGI» LLC

Table 53. Shareholders/founders of «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC

Table 54. Financials of «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC

Table 55. Balance sheet of «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC, ths rubles

Table 56. Profit and loss statement of «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC, ths rubles

Table 57. Cash flow statement of «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC, ths rubles

Table 58. Dynamics of financials of «YAKOVLEVSKAYA CHAERAZVESOCHNAYA FABRIKA» LLC

Table 59. Shareholders/founders of «AKHMAD TEA» FACTORY» LLC

Table 60. Subsidiaries of «AKHMAD TEA» FACTORY» LLC

Table 61. Production volumes of «AKHMAD TEA» FACTORY» LLC

Table 62. Balance sheet of «AKHMAD TEA» FACTORY» LLC, ths rubles

Table 63. Profit and loss statement of «AKHMAD TEA» FACTORY» LLC, ths rubles

Table 64. Cash flow statement of «AKHMAD TEA» FACTORY» LLC, ths rubles

Table 65. Dynamics of financials of «AKHMAD TEA» FACTORY» LLC

Table 66. Shareholders of «KUBAN TEA» LLC

Table 67. Subsidiaries of «KUBAN TEA» LLC

Table 68. Balance sheet of «KUBAN TEA» LLC, ths rubles

Table 69. Profit and loss statement of «KUBAN TEA» LLC, ths rubles

Table 70. Cash flow statement of «KUBAN TEA» LLC, ths rubles

Table 71. Dynamics of financials of «KUBAN TEA» LLC

Table 72. Shareholders of «MAY» COMPANY» JSC

Table 73. Subsidiaries of «MAY» COMPANY» JSC

Table 74. Production volumes of «MAY» COMPANY» JSC

Table 75. Balance sheet of «MAY» COMPANY» JSC, ths rubles

Table 76. Profit and loss statement of «MAY» COMPANY» JSC, ths rubles

Table 77. Cash flow statement of «MAY» COMPANY» JSC, ths rubles

Table 78. Dynamics of financials of «MAY» COMPANY» JSC

18. FORECAST OF RUSSIAN TEA MARKET

Schedule 52. Dynamics of Russian tea market volume in general in 2007-2014* and forecast for 2015-2016, tons

Schedule 53. Dynamics of tea consumption level in 2007-2014* and forecast for 2015-2016, kg/person

Schedule 54. Volume of weighed tea market in Russia in 2007-2014* and forecast for 2014-2016, tons

Schedule 55. Dynamics Russian packed tea market volume in 2007-2014* and forecast for 2015-2016, tons

Schedule 56. Dynamics Russian packed tea market volume in 2007-2014* in cost terms and forecast for 2015-2016, mln dollars

Schedule 57. Ratio of Russian markets of packed tea volumes in physical and in cost terms in 2007-2014* and forecast in 2015-2016

Schedule 58. Dynamics of import content on the market of packed tea in physical terms in 2007-2016*, %

Schedule 59. Dynamics of packed tea consumption level in 2007-2013 and forecast for 2014-2016, kg/person

ABOUT INTESCO RESEARCH GROUP

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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.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
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