



**Intesco
Research
Group**

WORLD MARKET OF MINERAL AND DRINKING WATER. RUSSIAN MARKET OF MINERAL AND DRINKING WATER– 2012



MOSCOW 2012

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	8
EXTRACTS FROM RESEARCH.....	10
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	14
ABOUT INTESCO RESEARCH GROUP	28

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS AND TABLES AND SCHEME

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Number of population

The 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 world population

2. SUBJECT OF RESEARCH

2.1. Definition

2.2. Classification

Classification by ARCP

Classification by ARCPEA

Classification by FEA CN

Other classifications

3. WORLD MARKET OF MINERAL AND DRINKING WATER

Europe

Regulations of the market of bottled water in EU

USA

Great Britain

4. ANALYSIS OF RETAIL SALES OF ALCOHOL-FREE BEVERAGES

4.1. Structure of retail sales by types of beverages

4.2. Dynamics of retail sales by years

4.3. Dynamics of retail sales by quarters

4.4. Structure of retail sales by federal districts

4.5. Largest regions of RF by retail sales

5. VOLUME OF THE RUSSIAN MARKET OF DRINKING AND MINERAL WATER

5.1. Dynamics of the market volume

5.2. Import content on the market

- 5.3. Dynamics of import content on the market
- 5.4. Product consumption on the market
- 5.5. Segmentation of the market of drinking and mineral water
 - Segmentation by price*
 - Segmentation by packing*
 - Segmentation by types*
 - Segment of HOD*
- 6. TRENDS ON THE RUSSIAN MARKET OF DRINKING AND MINERAL WATER**
- 7. FACTORS INFLUENCING THE MARKET OF DRINKING AND MINERAL WATER**
- 8. STATE REGULATIONS ON THE MARKET**
- 9. THE LARGEST PLAYERS ON THE MARKET OF DRINKING AND MINERAL WATER**
 - 9.1. Structure of the market by the largest companies
 - 9.2. PepsiCo Holdings
 - 9.3. «The Coca-Cola Company»
 - 9.4. «Nestle Waters» SC
 - 9.5. Other companies on the market
 - «Visma» LLC*
 - «Progress» JSC*
 - «Chistaya voda» Company» LLC*
- 10. DISTRIBUTION CHANNELS ON THE MARKET**
 - Trading networks*
 - Home&office delivery (HOD)*
 - Trading machines*
- 11. RAW MATERIAL BASE**
 - 11.1. Mineral water
 - 11.2. Drinking water
- 12. MINERAL AND DRINKING WATER PRODUCTION**
 - 12.1. Structure of production
 - 12.2. Mineral and drinking water production
 - Dynamics of production volumes by years*
 - Dynamics of production volumes by months*
 - Production volumes by federal districts of RF*
 - Structure of production by federal districts of RF*
 - Production volumes in regions of RF*
 - 12.3. Production of mineral water in separate segments

- 12.3.1. *Natural mineral table water*
- 12.3.2. *Mineral medicinal table water*
- 12.3.3. *Natural mineral medicinal sparkling water*
- 12.3.4. *Artificially mineralized water*

- 12.4. Sparkling water production
- 12.5. Drinking water production
- 12.6. Production of mineral and sparkling water with flavors

13. THE LARGEST RUSSIAN PRODUCERS

- 13.1. The largest Russian producers of mineral water
- 13.2. The largest Russian producers of mineral medicinal water
- 13.3. The largest Russian producers of mineral medicinal table water
- 13.4. The largest Russian producers of mineral drinking table water
- 13.5. The largest Russian producers mineralized drinking water
- 13.6. The largest Russian producers by the volume of proceeds

14. EXPORT

Structure of the Russian export

- 14.1. Export of mineral and sparkling water
 - Dynamics of export volumes by years*
 - Dynamics of export volume by months*
 - Export volumes by countries of destination*
 - Export structure by countries of destination*
- 14.2. Export of other water including natural and artificially mineralized, sparkling
 - Dynamics of export volumes by years*
 - Dynamics of export volume by months*
 - Export volumes by countries of destination*
 - Export structure by countries of destination*
- 14.3. Export of mineral and sparkling water with flavors
 - Dynamics of export volumes by years*
 - Dynamics of export volume by months*
 - Export volumes by countries of destination*
 - Export structure by countries of destination*

15. IMPORT

- 15.1. Import of mineral and sparkling water
- 15.2. Import other water including natural and artificially mineralized, sparkling
- 15.3. Import water including mineral and sparkling, containing flavors

16. PRODUCER PRICES FOR MINERAL WATER

- 16.1. Dynamics of producer prices by years
- 16.2. Dynamics of producer prices by months

17. RETAIL PRICES FOR MINERAL WATER

- 17.1. Dynamics of retail prices by years
- 17.2. Dynamics of retail prices by months

18. CONSUMER PREFERENCES ON THE MARKET**19. PROFILES OF THE LARGEST ENTERPRISES**

- 19.1. «KARACHINSKIY ISTOCHNIK» LLC

Reference information

Activities

Subsidiaries of «KARACHINSKIY ISTOCHNIK» LLC

Production volumes

Balance sheet

Cash flow statement

Financials

- 19.2. «Merkuriy» LLC

Reference information

Activities

Subsidiaries

Production volumes

Balance sheet

Cash flow statement

Financials

- 19.3. «Nestle WaterCoolers Service» LLC

Reference information

Activities

Subsidiaries

Production volumes

Balance sheet

Cash flow statement

Financials

- 19.4. «Undory plant of mineral water «Volzhanka» consumer union

Reference information

Activities

Subsidiaries

Production volumes

Balance sheet

Cash flow statement

Financials

19.5. «Chistaya voda» Company» LLC

Reference information

Activities

Subsidiaries

Balance sheet

Cash flow statement

Financials

**20. FORECAST OF THE MARKET DEVELOPMENT FOR 2012-2015
ABOUT INTESCO RESEARCH GROUP**

RESEARCH METHODOLOGY

Subject of research:

RUSSIAN AND WORLD MARKET OF MINERAL AND DRINKING WATER

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2015

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

WORLD MARKET OF DRINKING AND MINERAL WATER

RETAIL SALES OF ALCOHOL-FREE BEVERAGES ANALYSIS

VOLUME OF THE RUSSIAN MARKET OF DRINKING AND MINERAL WATER

TRENDS ON THE RUSSIAN MARKET OF DRINKING AND MINERAL WATER

FACTORS INFLUENCING THE MARKET OF DRINKING AND MINERAL WATER

STATE REGULATIONS OF THE MARKET

THE LARGEST PLAYERS ON THE MARKET OF DRINKING AND MINERAL WATER

DISTRIBUTION CHANNELS OF THE RUSSIAN MARKET

RAW MATERIAL BASE

MINERAL AND DRINKING WATER PRODUCTION

THE LARGEST RUSSIAN PRODUCERS

EXPORT

IMPORT

PRODUCER PRICES FOR MINERAL WATER

RETAIL PRICES FOR MINERAL WATER

CONSUMER PREFERENCES ON THE MARKET

PROFILES OF THE LARGEST ENTERPRISES

FORECAST OF THE MARKET DEVELOPMENT FOR 2012-2015

The largest Russian producers with profiles:

«KARACHINSKIY ISTOCHNIK» LLC

«Merkuriy» LLC

«Nestle WaterCoolers Service» LLC

«Undory plant of mineral water «Volzhanka» consumer union

«Chistaya voda» Company» LLC

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

Ministry of economic development of RF

RF tax service

Federal Customs Service

Expert evaluations

Materials of field establishments

Field print and electronic, business and specialized publications

Material of producing companies and market players

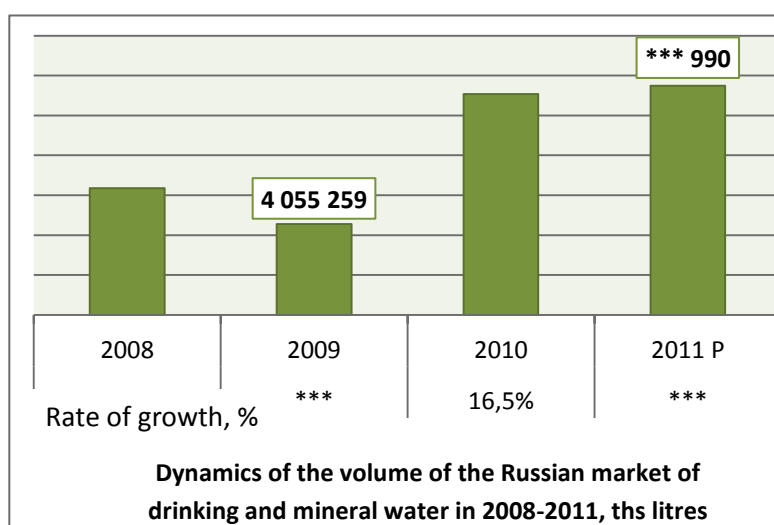
The research contains 94 schedules, 78 diagrams, 59 tables.

EXTRACTS FROM RESEARCH

CHAPTER 5

VOLUME OF THE RUSSIAN MARKET
OF DRINKING AND MINERAL WATER

Volume of the Russian market in 2011 increased slightly – by***%. The reason of a small rate of growth was in ***. Imported products had an insignificant part of the Russian market, so small rate of import growth (by***%) did not affect the volume. At the same time market volume in 2011 ***% exceeded the parameter of 2009. (The leap



of the demand in 2010 made a high hurdle, influencing the rate of growth of the Russian market.

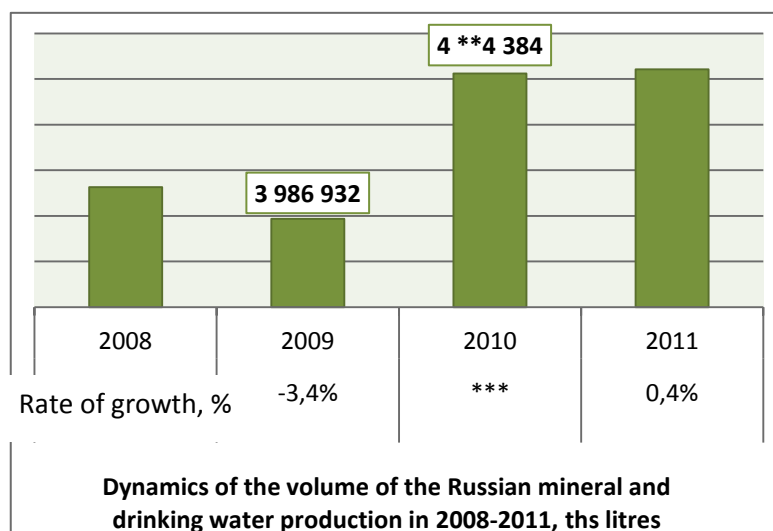


Import content on the market of drinking and mineral water amounted to ***% in 2011. These products belonged mainly to the premium segment, coming from France and Italy. The largest import content was marked in the segment of ***.

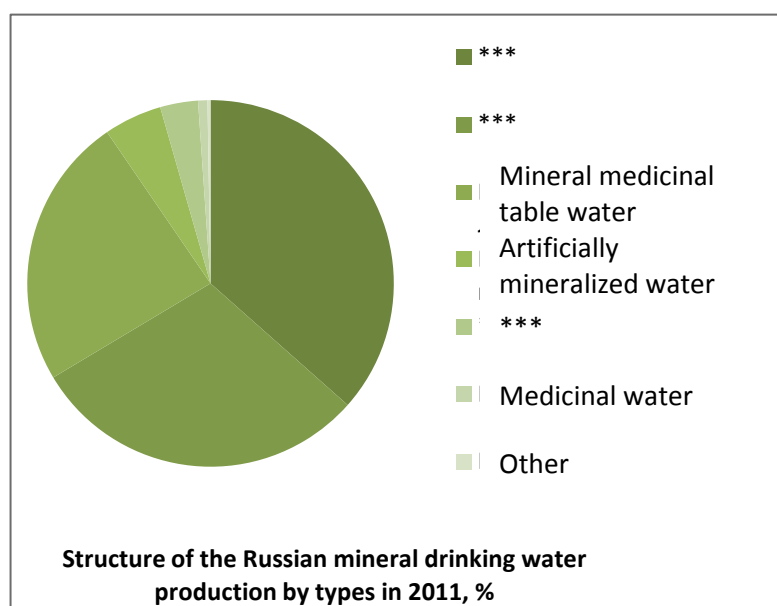
CHAPTER 12

PRODUCTION OF DRINKING AND MINERAL WATER

In 2011 Russian production of drinking and mineral water reached the level of *** billion litres. Compared to 2010 an increase was insignificant, but compared to 2008 the rate of growth amounted to ***%. Summer 2010 was abnormally hot, and made producers increase volumes of production in 2010 by ***% compared to the previous year. The reason of low production increase in 2011 in ***.



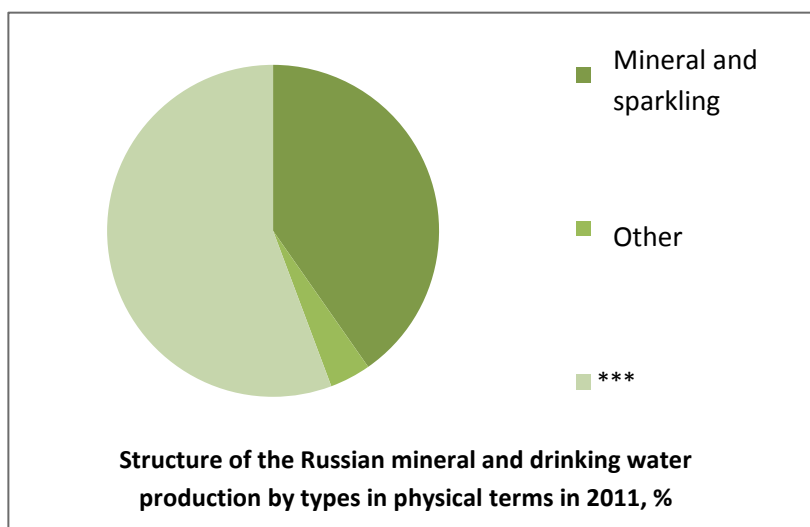
In the structure of the Russian mineral and drinking water production in 2011*** prevailed (37%). It was followed by *** (30%) –the share of mineral medical table water was equal to ***% of production.



CHAPTER 14

ANALYSIS OF THE RUSSIAN
EXPORT OF DRINKING AND
MINERAL WATER

In the structure of the Russian export besides Kazakhstan *** prevailed, its share in 2011 was equal to ***% of export in physical terms. It should be mentioned that the share of *** in export structure during the period from 2008 till 2011 decreased due to the increase of the share of ***. Taking into account export to Kazakhstan the share of



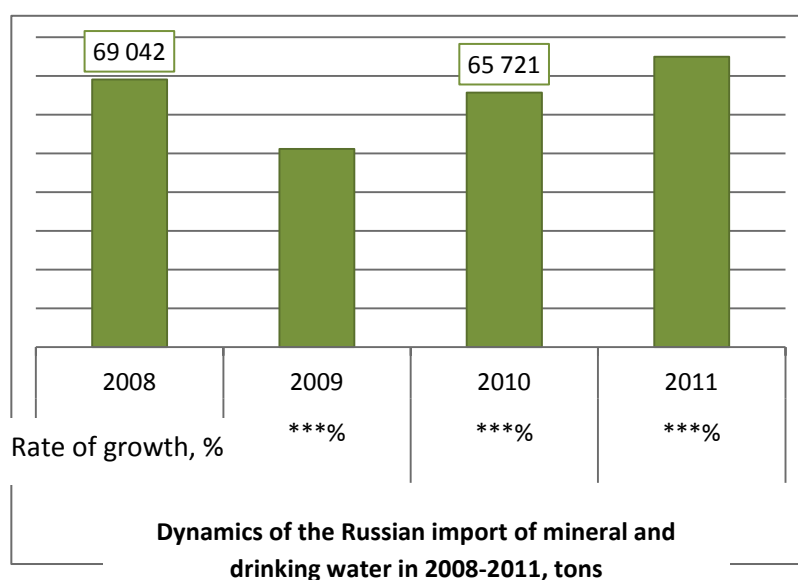
*** would amount to about 20-25%, and more than half would belong to ***.

In the structure of the Russian export in physical terms in 2011 *** ranked first which consumed one third of the volume. *** ranked second where 23% of the Russian export of mineral and drinking water was sold.

CHAPTER 15

**ANALYSIS OF THE RUSSIAN
IMPORT OF DRINKING AND
MINERAL WATER**

Volume of the Russian import of drinking and mineral water was insignificant compared to the volume of domestic production and consumption. Mineral water of premium-class is supplied mainly from France and Italy, mineral water from Caucasus. In particular, famous water «Borzhomi».



Volume of the Russian import in physical terms in 2011 was almost equally divided between mineral sparkling water and other water.

Import volume of mineral and sparkling water in 2011 amounted to *** ths tons, that was **% (or *** ths tons) more than in 2010. During the surveyed period the minimal import

was registered in 2009. In 2011 it was the first time when import exceeded the parameter of 2008.

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Dynamics of resident population number of Russia in 2000, 2005, 2010 and forecast for 2015 and 2020, ths people.

Table 1. Number of the largest cities of Russia according to all-Russian Census of 2010, ths people

Schedule 2. Dynamics of actual household disposable income in Russia in 2000-2010, %

Schedule 3. Forecast of the ratio of demographic load dynamics in 2011-2033

Schedule 4. Dynamics of number of employed and unemployed people in RF in 2006-2010, ths people

Schedule 5. Dynamics of share of the unemployed in economically active population by FD of RF in 2006-2010, %

Schedule 6. Dynamics of GDP of RF in prices of 2008 in 2001-2011, billion rubles

Schedule 7. Investments into the fixed capital of RF in 2001-2010

Schedule 8. Surplus/deficit of consolidated budget of RF in 2006-2010, %

Schedule 9. Dynamics of total external debt of RF 2001-2010

Schedule 10. Dynamics of the Russian external debt structure by the main sectors in 2001-2010, %

Schedule 11. Consumer prices index in RF 2001-2010, %

Schedule 12. Share of RF in the population of the world in 2000-2010 and forecast until 2100

Schedule 13. Share of RF in the world GDP in 2000-2010 and forecast for 2011-2016

2. SUBJECT OF RESEARCH

3. WORLD MARKET OF MINERAL AND DRINKING WATER

Schedule 14. The largest countries by the volume of drinking water sales in 2009, billion litres

Table 2. The largest countries by the volume of drinking water sales in 2009, billion litres

Schedule 15. The largest countries by the volume of per capita drinking water consumption in 2009, billion litres

Table 3. The largest countries by the volume of per capita drinking water consumption in 2009, billion litres

Diagram 1. Structure of alcohol-free beverages consumption in Europe by categories in 2009 , %

Schedule 16. The largest countries by the volume of per capita water consumption in Europe in 2009, litres

Table 4. Per capita consumption of drinking water in European countries in 2009, litres

Diagram 2. Structure of water sales in Europe by categories in 2009 , %

Diagram 3. Structure of water sales in Europe by sparkliness in 2009 , %

Schedule 17. Dynamics of the volume of bottled water sales in USA in 2008-2011, billion litres

Schedule 18. Dynamics of the volume of bottled water sales in USA in 2008-2011, million dollars

Diagram 4. Structure of bottled water sales in USA by types in 2011 , %

Diagram 5. Structure of water sales in Great Britain by sparkliness in 2011 , %

Diagram 6. Structure of water sales in Great Britain by categories in 2011 , %

Diagram 7. Structure of water sales in Great Britain by types of packing in 2011 , %

Diagram 8. Channels of water sales in Great Britain in 2011 , %

4. ANALYSIS OF RETAIL SALES OF ALCOHOL-FREE BEVERAGES

Diagram 9. Structure of alcohol-free beverages consumption in 2011, %

Schedule 19. Dynamics of retail sales alcohol-free beverages in Russia in 2009-2011, billion dollars

Schedule 20. Dynamics of retail sales alcohol-free beverages by quarters in 2009 – 1 qtr 2012, billion dollars

Table 5. Volumes of retail sales of alcohol-free beverages in federal districts of RF in 2009-2011, billion dollars

Diagram 10. Structure of retail sales of alcohol-free beverages by federal districts of RF in cost terms in 2011, %

Diagram 11. Change of retail sales structure of alcohol-free beverages by federal districts of RF in cost terms in 2009-2011, %

Schedule 21. Largest regions of RF by the volumes of retail sales alcohol-free beverages in 2011, billion rubles

Table 6. Retail sales volumes of alcohol-free beverages in regions of RF in 2009-2011, ths rubles.

Diagram 12. Regional structure of retail sales alcohol-free beverages in 2011 in cost terms, %

Diagram 13. Change of regional structure of retail sales of alcohol-free beverages in RF in cost terms in 2009-2011, %

5. VOLUME OF THE RUSSIAN MARKET OF DRINKING AND MINERAL WATER

Schedule 22. Dynamics of the volume of the Russian market of mineral and drinking water in 2008-2011, ths litres

Diagram 14. Import content on the Russian market of mineral and drinking water in physical terms in 2011, %

Diagram 15. Dynamics of import content on the Russian market of mineral and drinking water in physical terms in 2008-2011, %

Schedule 23. Per capita consumption of mineral and drinking water in Russia in 2008-2011, litres/person

6. TRENDS ON THE RUSSIAN MARKET OF DRINKING AND MINERAL WATER

7. FACTORS INFLUENCING THE MARKET OF DRINKING AND MINERAL WATER

8. STATE REGULATIONS ON THE MARKET

9. THE LARGEST PLAYERS ON THE MARKET OF DRINKING AND MINERAL WATER

Diagram 16. Structure of the largest producers retail sales of mineral and drinking water in physical terms in 2010, %

10. DISTRIBUTION CHANNELS ON THE MARKET

11. RAW MATERIAL BASE

12. MINERAL AND DRINKING WATER PRODUCTION

Diagram 17. Structure of the Russian production of mineral and drinking water by types in 2011, %

Schedule 24. Dynamics of the volume of the Russian production of mineral and drinking water in 2008-2011, ths litres

Schedule 25. Dynamics of the volume of the Russian production of mineral and drinking water by months in 2008-2011, ths litres

Table 7. Volume of the Russian production mineral and drinking water in 2008-2011, ths litres

Schedule 26. Dynamics of mineral and drinking water production in the largest federal districts of RF in 2008-2011, ths litres

Diagram 18. Structure of the Russian production of mineral and drinking water by federal districts in 2011, %

Diagram 19. Change of structure of the Russian production of mineral and drinking water by federal districts in 2008-2011, %

Table 8. Production volumes of drinking and mineral water by regions of Russia in 2008-2011, ths litres

Schedule 27. Dynamics of mineral and drinking water production in main regions of RF in 2008-2011, ths litres

Diagram 20. Change of regional structure of the Russian production of mineral and drinking water in 2008-2011, %

Schedule 28. Dynamics of the volume of the Russian mineral table water production in 2010-2011, ths litres

Table 9. Volumes of the Russian mineral table water production in federal districts in 2010-2011, ths litres

Schedule 29. Dynamics of the Russian mineral table water production in the largest federal districts of RF in 2010-2011, ths litres

Diagram 21. Structure of the Russian mineral table water production by federal districts in 2011, %

Diagram 22. Change of structure of the Russian mineral table water production by federal districts in 2010-2011, %

Table 10 Volumes of the Russian mineral table water production in regions in 2010-2011, ths litres

Schedule 30. Dynamics of the Russian mineral table water production in main regions of RF in 2010-2011, ths litres

Diagram 23. Regional structure of the Russian mineral table water production in 2011, %

Diagram 24. Change of regional structure of the Russian mineral table water production in 2010-2011, %

Rate of growth, %

Schedule 31. Dynamics of the Russian mineral medicinal table water production volume in 2010-2011, ths litres

Table 11. Volumes of the Russian mineral medicinal and table water production by federal districts in 2010-2011, ths litres

Schedule 32. Dynamics of mineral medicinal table water production in the largest federal districts of RF in 2010-2011, ths litres

Diagram 25. Structure of the Russian mineral medicinal table water production by federal districts in 2011, %

Diagram 26. Change of structure of the Russian mineral medicinal table water production by federal districts in 2010-2011, %

Table 12. Volumes of the Russian mineral medicinal and table water production by regions in 2010-2011, ths litres

Schedule 33. Dynamics of mineral medicinal table water production in main regions of RF in 2010-2011, ths litres

Diagram 27. Regional structure of the Russian mineral medicinal table water production in 2011, %

Diagram 28. Change of regional structure of the Russian mineral medicinal table water production in 2010-2011, %

Schedule 34. Dynamics of the volume of the Russian mineral medicinal water production in 2010-2011, ths litres

Table 13. Volumes of the Russian mineral medicinal water production by federal districts in 2010-2011, ths litres

Schedule 35. Dynamics of mineral medicinal water production in the largest federal districts of RF in 2010-2011, ths litres

Diagram 29. Structure of the Russian mineral medicinal water production by federal districts in 2011, %

Diagram 30. Change of structure of the Russian mineral medicinal water production by federal districts in 2010-2011, %

Table 14. Volumes of the Russian mineral medicinal water production by regions in 2010-2011, ths litres

Schedule 36. Dynamics of mineral medicinal water production in main regions of RF in 2010-2011, ths litres

Diagram 31. Regional structure of the Russian mineral medicinal water production in 2011, %

Diagram 32. Change of regional structure of the Russian mineral medicinal water production in 2010-2011, %

Schedule 37. Dynamics of the volume of the Russian artificially mineralized water production in 2010-2011, ths litres

Table 15. Volumes of the Russian production artificially mineralized water by federal districts in 2010-2011, ths litres

Schedule 38. Dynamics of the Russian artificially mineralized water production in the largest federal districts of RF in 2010-2011, ths litres

Diagram 33. Structure of the Russian artificially mineralized water production by federal districts in 2011, %

Diagram 34. Change of structure of the Russian artificially mineralized water production by federal districts in 2010-2011, %

Table 16. Volumes of the Russian production artificially mineralized water by regions in 2010-2011, ths litres

Schedule 39. Dynamics of the Russian artificially mineralized water production in main regions of RF in 2010-2011, ths litres

Diagram 35. Regional structure of the Russian artificially mineralized water production in 2011, %

Diagram 36. Change of regional structure of the Russian artificially mineralized water production in 2010-2011, %

Schedule 40. Dynamics of the volume of the Russian sparkling water production in 2010-2011, ths litres

Table 17. Volumes of the Russian sparkling water production by federal districts in 2010-2011, ths litres

Schedule 41. Dynamics of sparkling water production in the largest federal districts of RF in 2010-2011, ths litres

Diagram 37. Structure of the Russian sparkling water production by federal districts in 2011, %

Diagram 38. Change of structure of the Russian sparkling water production by federal districts in 2010-2011, %

Table 18. Volumes of the Russian sparkling water production by regions in 2010-2011, ths litres

Schedule 42. Dynamics of sparkling water production in main regions of RF in 2010-2011, ths litres

Diagram 39. Regional structure of the Russian sparkling water production in 2011 , %

Diagram 40. Change of regional structure of the Russian sparkling water production in 2010-2011, %

Schedule 43. Dynamics of the volume of the Russian drinking water production in 2010-2011, ths litres

Table 19. Volumes of the Russian drinking water production by federal districts in 2010-2011, ths litres

Schedule 44. Dynamics of drinking water production in the largest federal districts of RF in 2010-2011, ths litres

Diagram 41. Structure of the Russian natural drinking water production by federal districts in 2011 , %

Diagram 42. Change of structure of the Russian natural drinking water production by federal districts in 2010-2011, %

Table 20. Volumes of the Russian drinking water production by regions in 2010-2011, ths litres

Schedule 45. Dynamics of drinking water production in main regions of RF in 2010-2011, ths litres

Diagram 43. Regional structure of the Russian natural drinking water production in 2011 , %

Diagram 44. Change of regional structure of the Russian natural drinking water production in 2010-2011, %

Diagram 45. Structure of the Russian production of mineral and sparkling water with addition of sugar and other flavors by types in 2011 , %

Diagram 46. Change of structure of the Russian production by types in 2009 - 2011, %

Schedule 46. The largest regions by mineral water production (natural and artificial) with addition of sugar and other flavors in 2011, ths litres

Schedule 47. The largest regions by sparkling water production with addition of sugar and other flavors in 2011, ths litres

Schedule 48. Dynamics of the volume of the Russian production of mineral and sparkling water with addition of sugar and other flavors in 2009-2011, ths litres

Table 21. Production volumes of sparkling and mineral water with flavors by federal districts in 2009-2011, ths litres

Schedule 49. Dynamics of mineral and sparkling water production with addition of sugar and other flavors in the largest federal districts of RF in 2009-2011, ths litres

Diagram 47. Structure of the Russian production of mineral and sparkling water with addition of sugar and other flavors by federal districts in 2011, %

Diagram 48. Change of structure of the Russian production of mineral and sparkling water with addition of sugar and other flavors by federal districts in 2009-2011, %

Table 22. Production volumes of sparkling and mineral water with flavors by federal districts in 2009-2011, ths litres

Schedule 50. Dynamics of mineral and sparkling water production with addition of sugar and other flavors in main regions of RF in 2009-2011, ths litres

Diagram 49. Regional structure of the Russian production of mineral and sparkling water with addition of sugar and other flavors in 2011, %

Diagram 50. Change of regional structure of the Russian production of mineral and sparkling water with addition of sugar and other flavors in 2009-2011, %

13. THE LARGEST RUSSIAN PRODUCERS

Table 23. Production volumes mineral and sparkling water production by the largest Russian producers in 2006-2009, ths litres

Schedule 51. Dynamics of mineral and sparkling water production by the largest companies in 2006-2009, %

Diagram 51. Structure of production of mineral and sparkling water by the largest companies in 2009, %

Table 24. Production volumes of mineral medicinal water by the largest Russian producers in 2006, ths litres

Diagram 52. Structure of mineral medicinal water production by the largest companies in 2006, %

Table 25. Production volumes of mineral medicinal table water by the largest Russian producers in 2007-2009, ths litres

Schedule 52. Dynamics of mineral medicinal table water production by the largest companies in 2007-2009, ths litres

Diagram 53. Structure of mineral medicinal and table water production by the largest companies in 2009, %

Table 26. Production volumes of mineral table water by the largest Russian producers in 2007-2009, ths litres

Schedule 53. Dynamics of mineral drinking table water production by the largest companies in 2007-2009, ths litres

Diagram 54. Structure of drinking and table water production by the largest companies in 2009 , %

Table 27. Production volumes of mineralized drinking water by the largest Russian producers in 2007-2009, ths litres

Schedule 54. Dynamics of mineralized drinking water production by the largest companies in 2007-2009, ths litres

Diagram 55. Structure of mineralized drinking water production by the largest companies in 2009 , %

Table 28. Volumes of proceeds from sales of mineral and drinking water by the largest Russian producers in 2008-2010, ths rubles.

Schedule 55. Dynamics of proceeds from sales of mineral and drinking water by the largest companies in 2008-2010, ths litres

14. EXPORT

Diagram 56. Structure of the Russian export by types of products in physical terms in 2011 , % (besides Kazakhstan)

Diagram 57. Structure of the Russian export by types of products in cost terms in 2011 , % (besides Kazakhstan)

Diagram 58. Structure of the Russian export to Kazakhstan by types of products in physical terms in 2010 , %

Diagram 59. Structure of the Russian export to Kazakhstan by types of products in cost terms in 2010 , %

Schedule 56. Russian export dynamics of mineral and sparkling water in 2008-2011, tons

Schedule 57. Russian export dynamics of mineral and sparkling water in 2008-2011, ths dollars

Schedule 58. Russian export dynamics of mineral and sparkling water by months in 2008 - April 2012, tons (besides Kazakhstan)

Schedule 59. Russian export dynamics of mineral and sparkling water by months in 2008 - April 2012, ths dollars (besides Kazakhstan)

Schedule 60. Russian export dynamics of mineral and sparkling water by months in Kazakhstan in 2008 - June 2010, tons

Schedule 61. Russian export dynamics of mineral and sparkling water by months in Kazakhstan in 2008 - June 2010, ths dollars

Table 29. Volumes of Russian export of mineral and sparkling water by countries of destination in 2008-2011, tons

Table 30. Volumes of Russian export of mineral and sparkling water by countries of destination in 2008-2011, ths dollars

Diagram 60. Structure of the Russian export of mineral and sparkling water by countries of destination in physical terms in 2011 , %

Diagram 61. Structure of the Russian export of mineral and drinking water by countries of destination in cost terms in 2011 , %

Schedule 62. Russian export dynamics of other water in 2008-2011, tons (besides Kazakhstan)

Schedule 63. Russian export dynamics of other water in Kazakhstan in 2008-2010*, ths tons

Schedule 64. Russian export dynamics of other water in 2008-2011, ths dollars (besides Kazakhstan)

Schedule 65. Russian export dynamics of other water in Kazakhstan in 2008-2010*, ths dollars

Schedule 66. Russian export dynamics of other water by months in 2008 - April 2012, tons (besides Kazakhstan)

Schedule 67. Russian export dynamics of other water by months in 2008 - April 2012, ths dollars (besides Kazakhstan)

Table 31. Volumes of Russian export of other water by countries of destination in 2008-2011, tons

Table 32. Volumes of Russian export of other water by countries of destination in 2008-2011, ths dollars

Diagram 62. Structure of the Russian export of other water by countries of destination in physical terms in 2011 , % (besides Kazakhstan)

Diagram 63. Structure of the Russian export of other water by countries of destination in cost terms in 2011 , % (besides Kazakhstan)

Schedule 68. Russian export dynamics of water containing flavors in 2008-2011, tons (besides Kazakhstan)

Schedule 69. Russian export dynamics of water containing flavors in 2008-2011, ths dollars (besides Kazakhstan)

Schedule 70. Russian export dynamics of water containing flavors, by months in 2008 - April 2012, tons (besides Kazakhstan)

Schedule 71. Russian export dynamics of water containing flavors, by months in 2008 - April 2012, ths dollars (besides Kazakhstan)

Table 33. Volumes of Russian export of water containing flavors, by countries of destination in 2008-2011, tons

Table 34. Volumes of Russian export of water containing flavors, by countries of destination in 2008-2011, ths dollars

Diagram 64. Structure of the Russian export of water containing flavors, by countries of destination in physical terms in 2011, % (besides Kazakhstan)

Diagram 65. Structure of the Russian export of water containing flavors, by countries of destination in cost terms in 2011, % (besides Kazakhstan)

15. IMPORT

Diagram 66. Structure of the Russian export by types of products in physical terms in 2011, %

Diagram 67. Structure of the Russian export by types of products in physical terms in 2011, %

Schedule 72. Dynamics of the Russian import of mineral and sparkling water in 2008-2011, tons

Schedule 73. Dynamics of the Russian import of mineral and sparkling water in 2008-2011, ths dollars

Schedule 74. Dynamics of the Russian import of mineral and sparkling water by months in 2008 - April 2012, tons

Schedule 75. Dynamics of the Russian import of mineral and sparkling water by months in 2008 - April 2012, ths dollars

Table 35. Volumes of the Russian import of mineral and sparkling water by countries of origin in 2008-2011, tons

Table 36. Volumes of the Russian import of mineral and sparkling water by countries of origin in 2008-2011, ths dollars

Diagram 68. Structure of the Russian import of mineral and sparkling water by countries of origin in physical terms in 2011, %

Diagram 69. Structure of the Russian import of mineral and sparkling water by countries of origin in cost terms in 2011, %

Schedule 76. Dynamics of the Russian import of other water in 2008-2011, tons

Schedule 77. Dynamics of the Russian import of other water in 2008-2011, ths dollars

Schedule 78. Dynamics of the Russian import of other water by months in 2008 - April 2012, tons

Schedule 79. Dynamics of the Russian import of other water by months in 2008 - April 2012, ths dollars

Table 37. Volumes of the Russian import of other water by countries of destination in 2008-2011, tons

Table 38. Volumes of the Russian import of other water by countries of destination in 2008-2011, ths dollars

Diagram 70. Structure of the Russian import of other water by countries of origin in physical terms in 2011, %

Diagram 71. Structure of the Russian import of other water by countries of origin in cost terms in 2011, %

Schedule 80. Dynamics of the Russian import of mineral and drinking water in 2008-2011, tons

Schedule 81. Dynamics of the Russian import of water containing flavors in 2008-2011, ths dollars

Schedule 82. Dynamics of the Russian import of water containing flavors, by months in 2008 - April 2012, tons

Schedule 83. Dynamics of the Russian import of water containing flavors, by months in 2008 - April 2012, ths dollars

Table 39. Volumes of the Russian import of water containing flavors, by countries of destination in 2008-2011, tons

Table 40. Volumes of the Russian import of water containing flavors, by countries of destination in 2008-2011, ths dollars

Diagram 72. Structure of the Russian import of water containing flavors, by countries of origin in physical terms in 2011, %

Diagram 73. Structure of the Russian import of water containing flavors, by countries of origin in cost terms in 2011, %

16. PRODUCER PRICES FOR MINERAL WATER

Schedule 84. Dynamics of average producer prices for mineral water in RF in 2008 - 2011, rub/thl litres

Schedule 85. Dynamics of average producer prices for mineral water in RF by months in 2008 - April 2012, rub/thl litres

Schedule 86. Dynamics of average producer prices for mineral water in 2010 - May 2012, rub/thr litres

17. RETAIL PRICES FOR MINERAL WATER

Schedule 87. Dynamics of average retail prices for mineral water in RF in 2008-2011, rub/litres

Schedule 88. Dynamics of average retail prices for mineral water in RF by months in 2008 - April 2012, rub/litres

Schedule 89. Dynamics of average retail price for mineral water in 2010 - May 2012, rub/litres

18. CONSUMER PREFERENCES ON THE MARKET

Schedule 90. Structure of buying of alcohol-free beverages by types in 2011, % of the number of responses

Diagram 74. Structure of consumer preferences by brands of drinking and mineral water in 2011, %

Diagram 75. Consumer preferences on drinking water by types of packing in 2012, %

Diagram 76. Consumer preferences on medicinal/medicinal-table water by types of packing 2011, %

Schedule 91. Consumer preferences on drinking water by volumes of packing in 2011, %

Schedule 92. Consumer preferences on medicinal/medicinal-table water by volumes of packing in 2011, %

Diagram 77. Importance of the type of packing in drinking water buying in 2011, %

Diagram 78. Importance of the type of packing in medicinal/medicinal-table water buying in 2011, %

19. PROFILES OF THE LARGEST ENTERPRISES

Table 41. Production volumes of «Karachinskiy Istochnik»

Table 42. Balance sheet of «Karachinskiy Istochnik» Company

Table 43. Cash flow statement of «Karachinskiy Istochnik» Company

Table 44. Financials of «Karachinskiy Istochnik» Company

Table 45. Production volumes of «Merkuriy» Company

Table 46. Balance sheet of «Merkuriy» Company

Table 47. Cash flow statement of «Merkuriy» Company

Table 48. Financials of «Merkuriy» Company

Table 49. Production volumes of «Nestle WaterCooler Service» Company

Table 50. Balance sheet of «Nestle WaterCooler Service» Company

Table 51. Cash flow statement of «Nestle WaterCooler Service» Company

Table 52. Financials of «Nestle WaterCooler Service» Company

Table 53. Production volumes of «Volzhanka» Company

Table 54. Balance sheet of «Volzhanka» Company

Table 55. Cash flow statement of «Volzhanka» Company

Table 56. Financials of «Volzhanka» Company

Table 57. Balance sheet of «Chistaya voda» Company

Table 58. Cash flow statement of «Chistaya voda» Company

Table 59. Financials of «Chistaya voda» Company

20. FORECAST OF THE MARKET DEVELOPMENT FOR 2012-2015

Schedule 93. Dynamics of the volume of the Russian market of mineral and drinking water in 2008-2011 and forecast for 2012-2015*, ths litres

Schedule 94. Dynamics of import content on the market of mineral and drinking water in physical terms in 2008-2015*, %

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