



**Intesco  
Research  
Group**

# **BREAD AND BAKERY PRODUCTS. RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS**



**MOSCOW 2012**

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## METHODOLOGY OF RESEARCH

**Subject of research:**

MARKET OF BREAD AND BAKERY PRODUCTS

**Goal of research:**

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS DEVELOPMENT  
FOR 2011-2014

**Regions of research:**

RUSSIA

AND REGIONS OF RF

**Main blocks of research:**

VOLUME OF THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

ANALYSIS OF RETAILING OF BREAD AND BAKERY PRODUCTS

TRENDS ON RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

STATE REGULATION ON THE MARKET OF BREAD AND BAKERY PRODUCTS

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STRUCTURE OF RETAIL PRICES FOR BREAD

FORECAST OF DEVELOPMENT OF THE RUSSIAN MARKET OF BREAD AND  
BAKERY PRODUCTS FOR 2010-2014

**The market is segmented:**

By types of bread and bakery products

By groups of bread and bakery products

**Largest Russian companies with profiles:**

«KHLEBNIY DOM» JSC

«KARAVAY» JSC

«LIPETSKHLEBMAKARONPROM» JSC

« KHLEBOZAVOD № 22» JSC

«PERVIY KHLEBOKOMBINAT» JSC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statement, the subsidiaries and other data about these main companies were presented.

**Information sources used:**

Federal State Statistics Service

Economic Development Ministry

Federal Customs Service

Federal Tax Service

Field expert evaluations

Materials of the field's main players

Field print and electronic publications

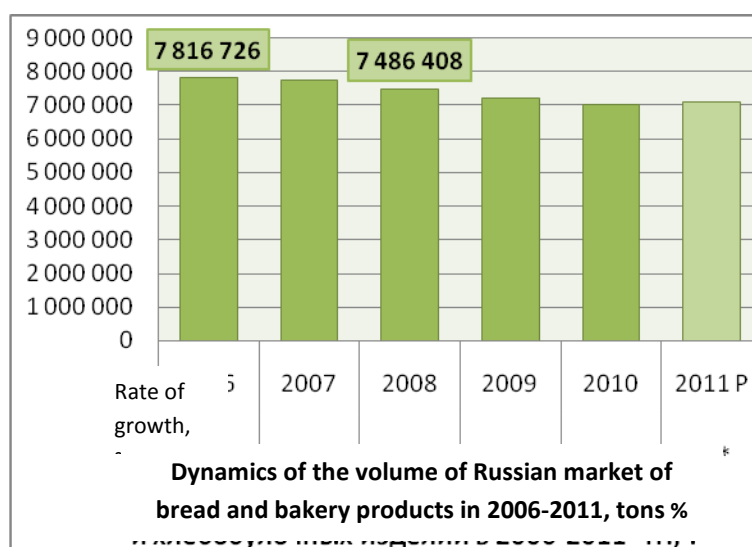
**The research contains 98 schedules, 78 diagrams, 117 tables and 3 schemes.**

## EXTRACTS FROM RESEARCH

## CHAPTER 3

## VOLUME OF THE RUSSIAN MARKET OF BREAD AND BAKERY PRODUCTS

In recent years the trend to decrease of the volume of the russian market of bread and bakery products was recorded. In 2010 the market volume decreased to 7 mln tons. However, according to experts of Intesco Research Group, in 2011 parameters of the market will show a positive dynamics, will increase about 1% compared to 2010. As for 2010 the share of the products of long-term storage amounted to \*\*%, and the supply of products of short-term storage formed \*\*% of the



Segmentation of the Russian market of bread and bakery products by groups in physical terms in 2009-2011. %

market. In 2011 the \*\*% increase of the products of long-term storage share is expected \*\*%. The growth was provided by the appearance of new products on the market (snacks, cakes of long-term storage) and active growth of frozen products segment.

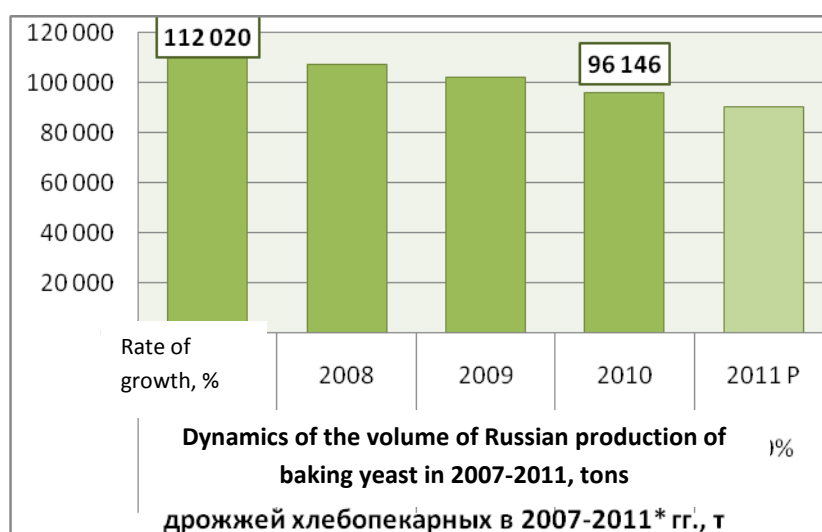
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RAW MATERIAL BASE FOR BREAD  
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In recent years production volume of bread-baking yeast has had the trend to decrease. In 2009 Russia produced \*\* ths tons of products, that is 5,3 ths tons less than in the previous year. In 2010 production decreased also by 5,7%.

In 2011 the decrease of production volumes to \*\* ths tons is expected.

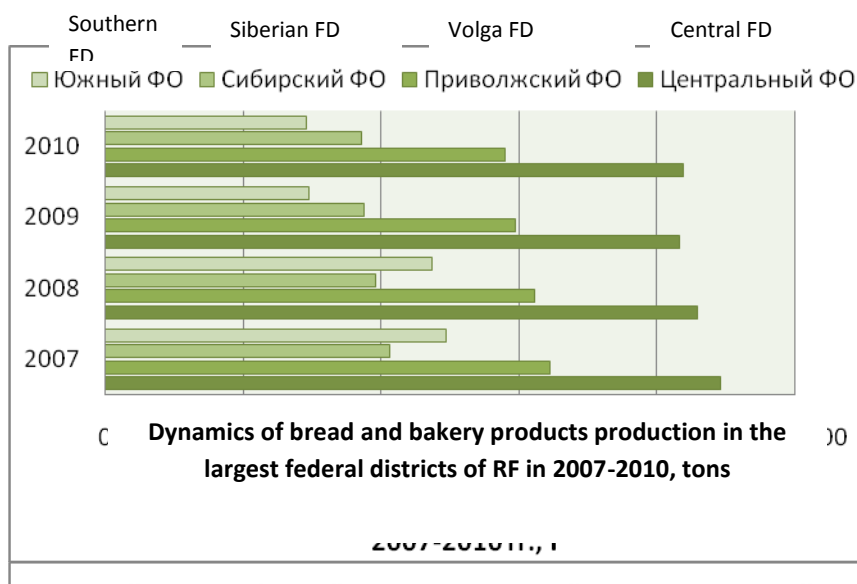
In January 2010 production volume of bread-baking yeast was equal \*\*\* tons, after a year this parameter increased by 195 tons and amounted \*\*\* tons.



If we talk about parameters of the last month, then in September 2011 volume of production output amounted \*\*\*tons, that is 11% less than in the same month of 2010.

## CHAPTER 9

## PRODUCTION OF BREAD AND BAKERY PRODUCTS



During 4 years production of bakery products in Central FD decreased by 134,9 ths tons, in Volga FD – by 164,5 ths tons. Production output of these products decreased most of all in Southern FD – by 506,8 ths tons.

More than a quarter of Russian bread and bakery products production was concentrated in 6 regions. The largest of them is Moscow, its share in 2010 amounted to 25.5%. Rate of growth amounted to 0,2%. Moscow Region produced 5.2% of products, Krasnodar Territory – 4,2%. 4,2% were produced on the territory of Saint Petersburg. Shares of Rostov Region and Republic of Dagestan had 1,2% less – 3% each region in the regional structure.





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