



**Intesco
Research
Group**

KITCHEN FURNITURE AND RUSSIAN MARKET OF KITCHEN FURNITURE



MOSCOW 2012

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RESEARCH METHODOLOGY

Subject of research:

MARKET OF KITCHEN FURNITURE

Goal of research:

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS
DEVELOPMENT FOR 2013-2015

Regions of research:

RUSSIA, REGIONS OF RF

Basic units of research:

WORLD MARKET OF KITCHEN FURNITURE
ANALYSIS OF RETAIL SALES OF HOUSEHOLD FURNITURE
VOLUME OF RUSSIAN MARKET OF KITCHEN FURNITURE
TRENDS ON RUSSIAN MARKET OF KITCHEN FURNITURE
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2015

The largest Russian enterprises profiled:

FURNITURE FACTORY MARIA, OJSC
SOK-LOGISTIC, LLC

FOREMA-KUKHNI, CJSC

BOROVICHI-MEBEL, CJSC

PERVAYA MEBELNAYA FABRIKA, CJSC

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 55 Schedules, 37 Diagrams, 68 Tables.

EXTRACTS FROM RESEARCH

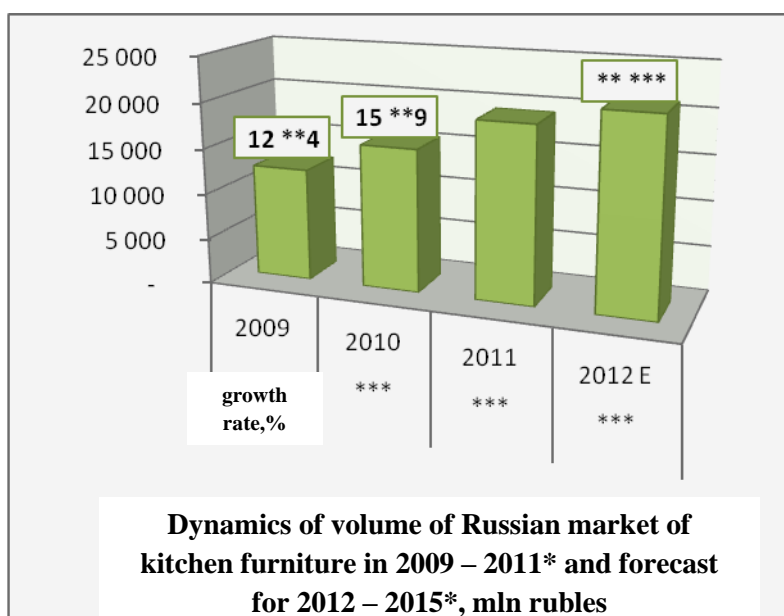
CHAPTER 5

VOLUME OF RUSSIAN MARKET
OF KITCHEN FURNITURE

According to estimations of analysts of Intesco Research Group within 2009 – 2011 Russian market of kitchen furniture was growing at the rate of **-% per annum and amounted to **,3 bln dollars in 2011. As a whole market was growing due to increase of production.

However in the first half of 2012 sharp reduction of rates of Russian production growth was observed. Analysts of Intesco Research Group forecast further increase of market volume approximately by **,5% per annum.

In 2011 share of import on Russian market of kitchen furniture amounted to *** % of the total cost. Due to growth of domestic production, share of import products reduced from ***% in 2009 to ***% in 2011.



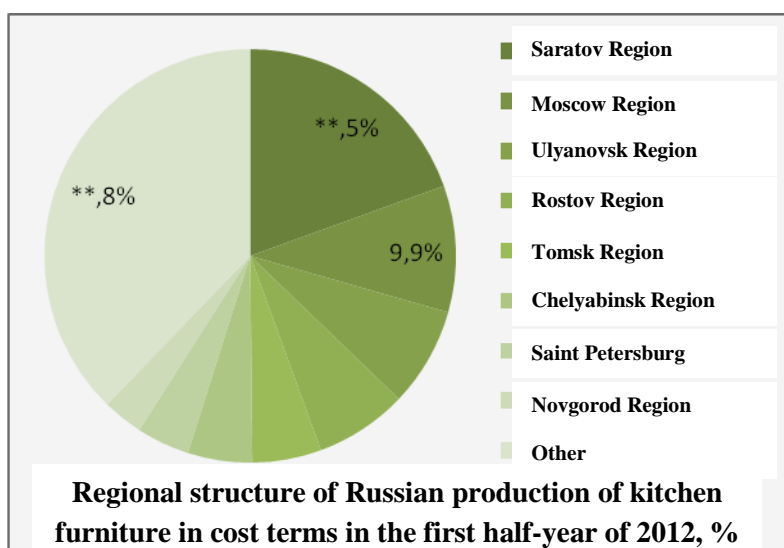
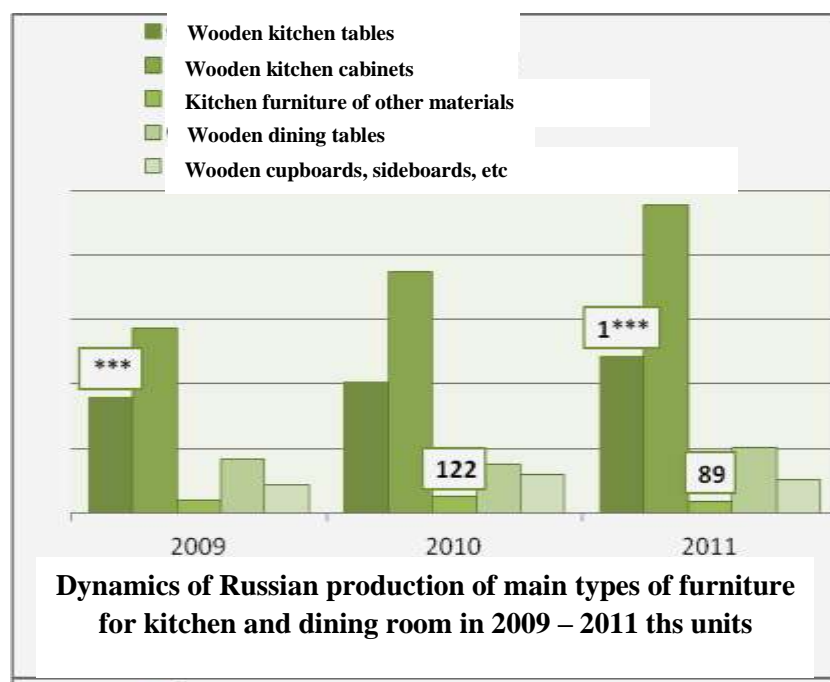
Volume of import in physical terms will grow more actively than in cost terms.

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Volumes of production of kitchen cabinets are growing at the most rapid rates: ** mln units were produced in 2009, a bit less - ** mln units were produced in 2010, while already ** mln units were produced in 2011, that is by ***% more than the volume of 2010 and by ***% - the volume of 2009. Production of kitchen table was also growing at rapid rates within the period specified. ** mln units were produced in 2009, a bit less - ** mln units were produced in 2010, while ** mln units were produced in 2012, that is by ***% more than the level of 2010 and by ***% - the level

of 2009. Growth of manufacture volumes of products belonged to other categories is not steady.



Market of kitchen furniture in Russia is characterized by high regional concentration. Thus, in 2011 about 64% of the total Russian production of kitchen furniture in cost terms was concentrated in the eight largest regions. In the first half year of 2012 Tomsk region hit the eight largest regions by products of kitchen furniture, while Moscow left the list. At that share of production in Tomsk region amounted to 5,*%.

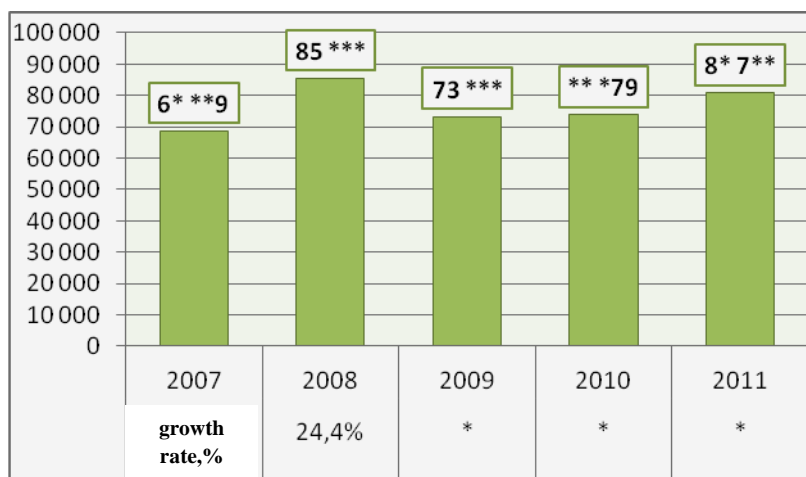
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Volume of import furniture in cost terms grew by *,4% in 2011 compared with 2010 and amounted to 8*,7 mln dollars. Cost of imports was growing since 2010, when its volume amounted to **, mln dollars, that is by *,8% more than the rate of 2009. Decline in import volumes was observed in 2009, when its volume reduced by **,2% compared with the previous year. It is explained by a sales slowdown during the crisis year.

As a whole, import volume both in physical and

cost terms exceeds the level of the pre-crisis year of 2007.



**Dynamics of Russian import of kitchen furniture in
2007 – 2011 ths dollars**

In January – July 2012 import volume of kitchen furniture from Italy amounted to **,1% of the



total Russian import of kitchen furniture. **,6% of products were imported from Ukraine, **,5% - from Germany. While the share of China was equal to **,6% in the structure of import. Import from other countries amounted to less than 1%. As a whole, four largest supplying countries provided Russia with about **% of Russian import of kitchen furniture.

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ABOUT INTESCO RESEARCH GROUP

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
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

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