



**Intesco  
Research  
Group**

# MILK AND CREAM. RUSSIAN MARKET OF MILK AND CREAM: FORECAST FOR 2013-2016



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ABOUT INTESCO RESEARCH GROUP

## RESEARCH METHODOLOGY

**Subject of research:**

MARKET OF MILK AND CREAM

**Goal of research:**

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

**Region of research:**

WORLD, RUSSIA AND RF REGIONS

**Main blocks of research:**

GENERAL ECONOMIC SITUATION IN RUSSIA

WORLD MARKET OF MILK AND CREAM

CATTLE LIVESTOCK IN RUSSIA

YIELD OF MILK IN RUSSIA

VOLUME OF THE RUSSIAN MARKET OF MILK AND CREAM

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THE LARGEST PLAYERS ON THE MARKET OF MILK AND CREAM

DISTRIBUTION CHANNELS ON THE RUSSIAN MARKET OF MILK PRODUCTS

ANALYSIS OF THE RUSSIAN EXPORT OF MILK AND CREAM

ANALYSIS OF THE RUSSIAN IMPORT OF MILK AND CREAM

PRODUCER PRICES FOR MILK AND CREAM IN RUSSIA

RETAIL PRICES FOR MILK AND CREAM IN RUSSIA

STRUCTURE OF RETAIL PRICE FOR MILK

CONSUMER PREFERENCES ON THE RUSSIAN MARKET OF MILK

FORECAST OF THE RUSSIAN MARKET OF MILK AND CREAM DEVELOPMENT FOR 2013-2016

**The largest Russian enterprises with profiles:**

«VIMM-BILL-DANN» JSC

«UNIMILK» COMPANY» JSC

«DANONE INDUSTRY» JSC

«CAMPINA» LLC

«EHRMANN» LLC

The research includes the main enterprises' production volumes, financial performance of activities, balance sheets, profit-and-loss reports, cash-flow statements, subsidiary enterprises and other information.

**Information sources used:**

Federal State Statistics Service

Ministry of Agriculture of RF

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sales reports

Materials of the field's main players

Field printed and electronic publications

**The research presents 118 schedules, 99 diagrams, 3 schemes and 90 tables..**

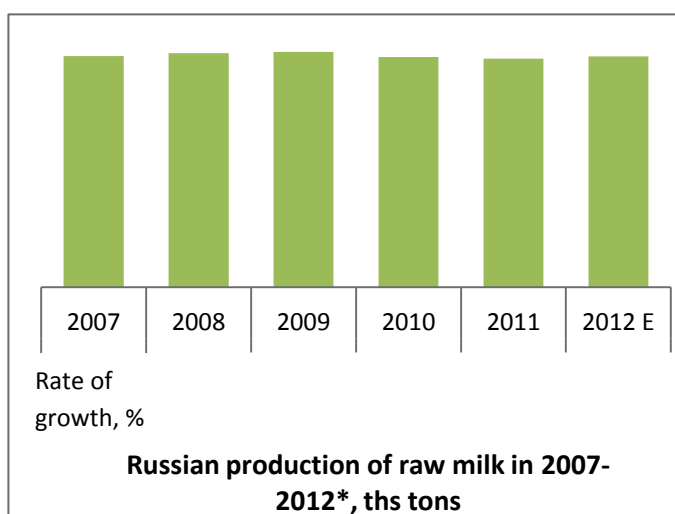
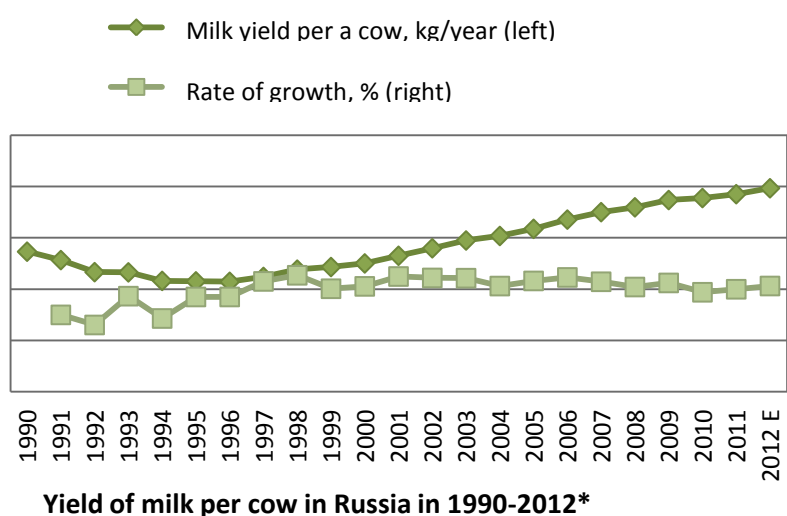
## EXTRACTS FROM RESEARCH

### CHAPTER 5

#### MILK YIELD IN RUSSIA

Productivity of cows in Russia, from the mid-1990-s increases constantly. The maximal rate of growth was marked in 1998-2006. By 2010 productivity reached 3776 kg of milk from one cow a year, 1632 kg more, than in 1996, milk yield was minimal.

According to experts of Intesco Research Group, in 2012 parameter of milk yield per one cow amounted to \*\*\* kg/year, that \*\*\*% exceeded the parameter of 2011 or by \*\*\* kg/year.



For comparison in developed countries of Europe and the world productivity of cows amounted to over \*\*\* ths kg a year. In Great Britain and Japan – over \*\*\* r ths kg, in Canada – over \*\*\* ths kg, in USA – over \*\*\* ths kg. That is why, despite a significant growth, Russian milk cattle breeding is behind the developed countries to a great extent.

## CHAPTER 6

**VOLUME OF THE RUSSIAN  
MARKET OF MILK AND CREAM**

In 2012 per capita consumption of drinking milk in Russia amounted to \*\*\* litres per person (36,8\*\*\* kg). It was \*\*\* litres more than in the previous year. For comparison: consumption of milk drinks in Russia according to the Federal State Statistics Service in 2011 amounted to \*\*\* litres per person and milk yield in 2011 in RF amounted to \*\*\* litres per person. Thus, the share of drinking milk in the structure of milk products consumption amounts to \*\*\*%.



Russian market of cream in 2009-2012 increased steadily. In 2010 the rate of growth amounted to \*\*\*%. The market volume reached \*\*\* ths tons. In 2011 the market of cream increased by\*\*\*%, in 2012– by \*\*\*%. In 2012 volume of the Russian market reached \*\*\* ths tons.

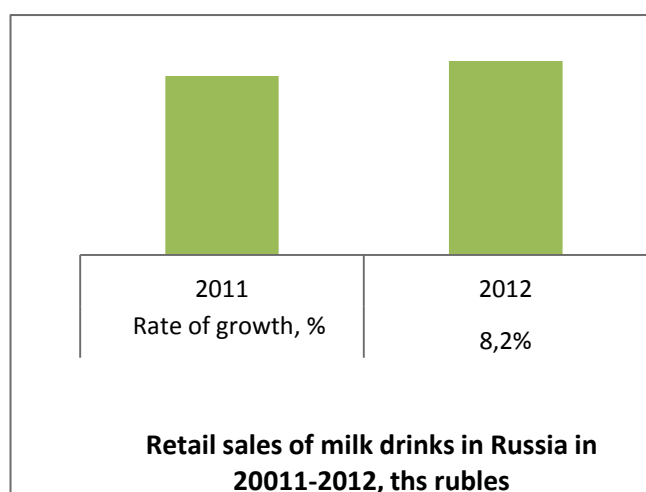
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ANALYSIS OF RETAIL SALES OF  
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In 2012 volume of retail sales of milk and milk drinks in cost terms increased by \*\*%. Volume of sales amounted to \*\*\* billion rubles.

The largest federal district by retail sales turnover is Central FD where in 2012 sales volume amounted to \*\*\* billion rubles. \*\*\* FD ranked second by milk consumption (\*\*\*billion rubles), Siberian FD - third (\*\*\*billion rubles).

The least amount of retail sales of milk turnover among federal districts of RF was marked in North Caucasian FD, which in 2012 sold products for almost \*\*\* billion rubles. Such a low parameter was due to the fact that \*\*\*.



In 2012 volume of retail sales of condensed and powdered milk in cost terms increased by \*\*%, and reached \*\*\* billion rubles.



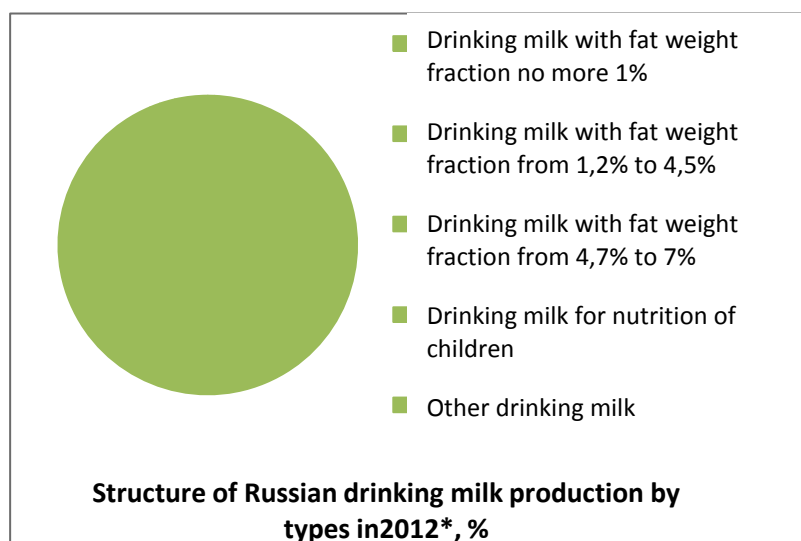
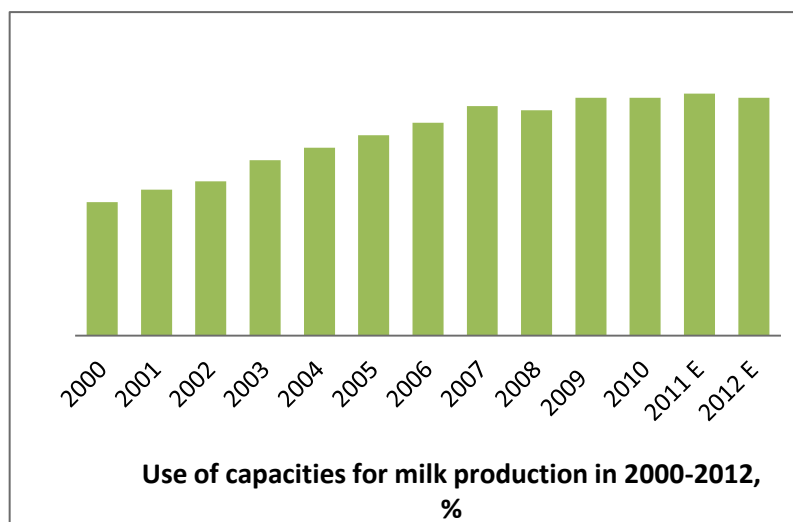
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In 2010 volume of drinking milk production amounted to \*\*\* ths tons that was \*\*\*\*% more, than in 2009. Such an increase of these goods production occurred despite of the \*\*\*\*% decrease of milk yield in 2010.

In 2011 the rate of growth slowed down to \*\*\*\*%. In 2012 \*\*\* ths tons were produced that \*\*\*\*% exceeded the same parameter of 2011.

The share of ten largest regions by volumes of drinking milk production in 2012 had \*\*\*\*% of total production. The share of Krasnodar Territory was equal to \*\*\*\*%, Krasnoyarsk Territory – \*\*\*\*%, Sverdlovsk Region – \*\*\*\*%. The share of Moscow amounted to \*\*\*\*%.



The maximal parameter of whole-milk products production during 2009-2012 was marked in May 2012 – \*\*\* ths tons. In December 2012 \*\*\* ths tons of goods of this segment were produced that was \*\*\*\*% more than during the same period of 2011.

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### ABOUT INTESCO RESEARCH GROUP



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**E-mail:** [info@i-plan.ru](mailto:info@i-plan.ru)

**Web-site:** [www.i-plan.ru](http://www.i-plan.ru)

**Tel.: +7 (495) 645-97-22**