



**Intesco
Research
Group**

SEMI-PRESERVED AND CANNED FISH AND SEAFOOD



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Source: Federal State Statistics Service

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Subject of research:

MARKET OF CANNED AND SEMI-PRESERVED FISH AND SEAFOOD

Goal of research:

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

Regions of research:

RUSSIA

REGIONS OF RF

BASIC UNITS OF RESEARCH:

VOLUME OF RUSSIAN MARKET OF CANNED AND SEMI-PRESERVED FISH AND SEAFOOD

TRENDS ON RUSSIAN MARKET OF CANNED AND SEMI-PRESERVED FISH AND SEAFOOD

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CANNED ANCHOVY

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CULINARY FISH PRODUCTS

Russian largest enterprises profiled:

“ROSKON” LLC

“YUZHNMORSKAYA BAZA RYBFLOTA” OJSC

“DELIKON PRODUKT” LLC

“KREON” LLC

“FISH-WORKS OSTROVNOY” 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 142 Schedules, 93 Diagrams, 151 Tables.

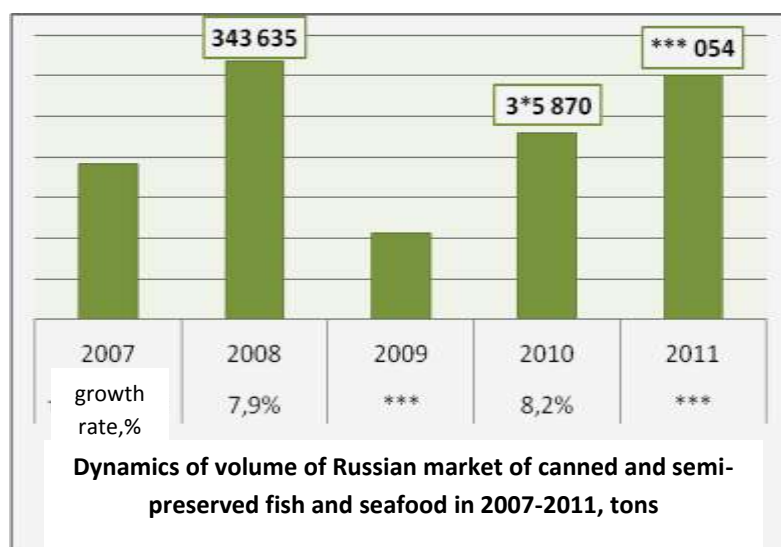
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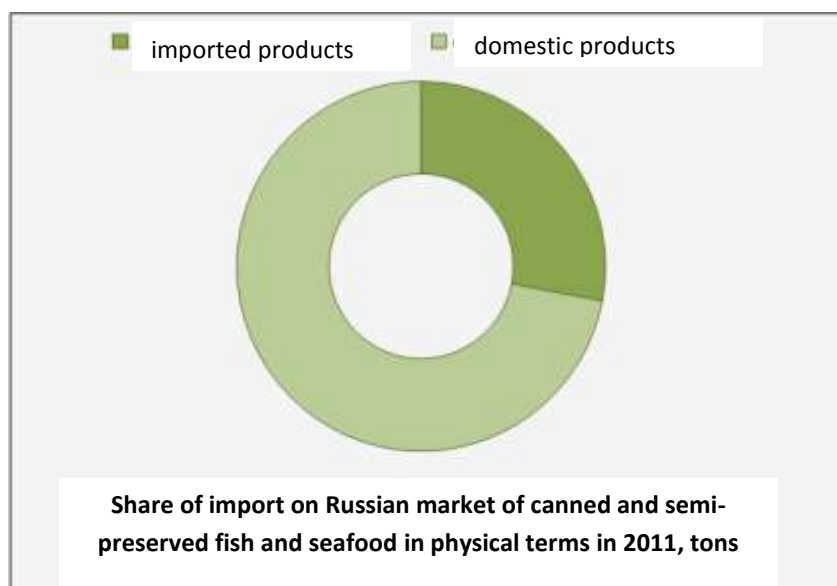
ОБЪЕМ

During crisis 2009 Russian market of canned and semi-preserved fish and seafood was marked by recession on the level of **%, but already in 2010 a positive tendency was outlined. However the pre-depression level of 2008 was not reached.

According to estimation of Intesco Research Group, in 2011 volume of Russian market of canned and semi-preserved foods was equal to *** ths tons, that is by *** ths tons more than in previous year.



On Russian market of canned and semi-preserved fish and seafood the share of import is quite high and amounts to more than one fourth of the total products, presented on the market.



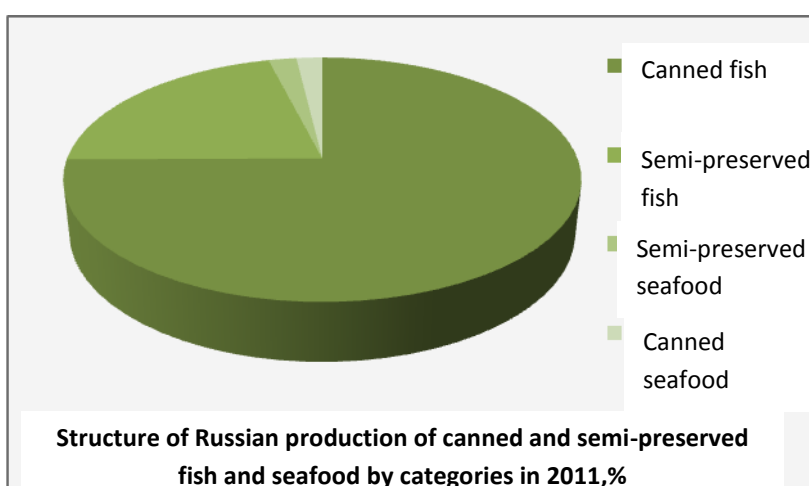
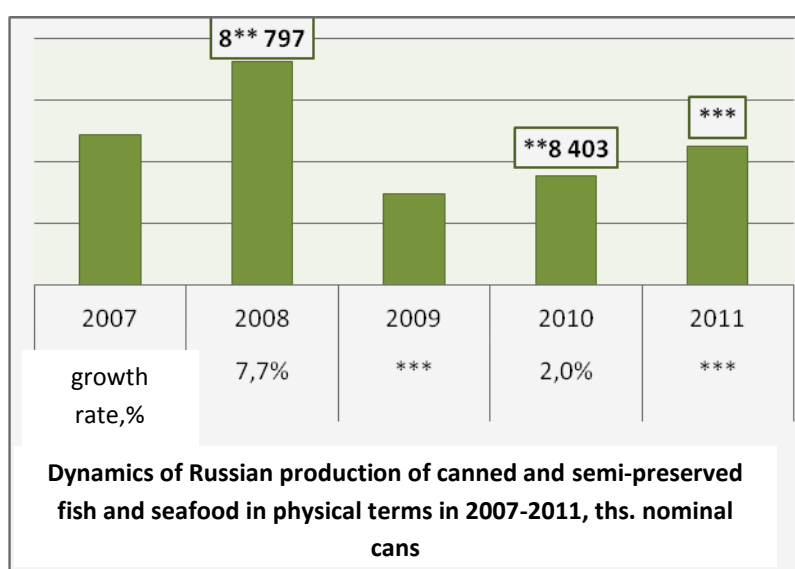
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PRODUCTION OF CANNED AND SEMI-PRESERVED FISH AND SEAFOOD IN RUSSIA

In 2009 Russian production of canned and semi-preserved fish and seafood is characterized

by negative growth (-***%). Since 2010 positive dynamics of growth established, the rate of which amounted to ***,3% in 2011. Thus volume of commercial production of canned and semi-reserved foods reached *** mln nominal cans.

In the structure of production the major part is constituted by canned fish. Its share was equal to *** %. Semi-preserved fish forms slightly more than one fifth of the volume of commercial production. Semi-finished and canned seafood constituted almost equal shares.

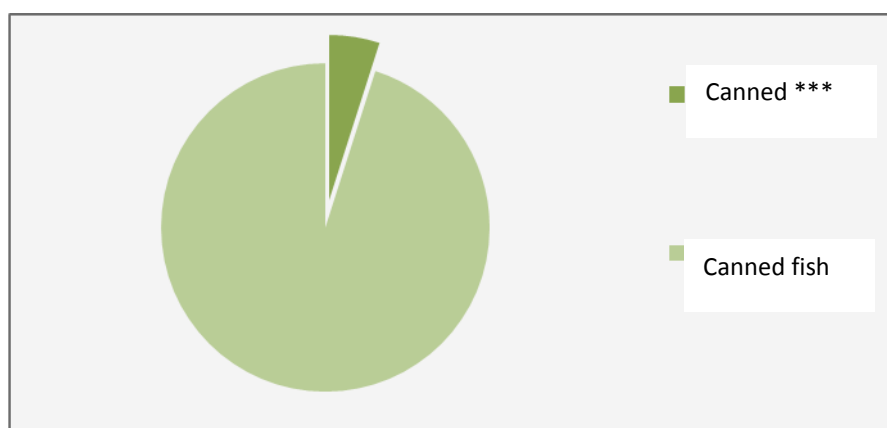
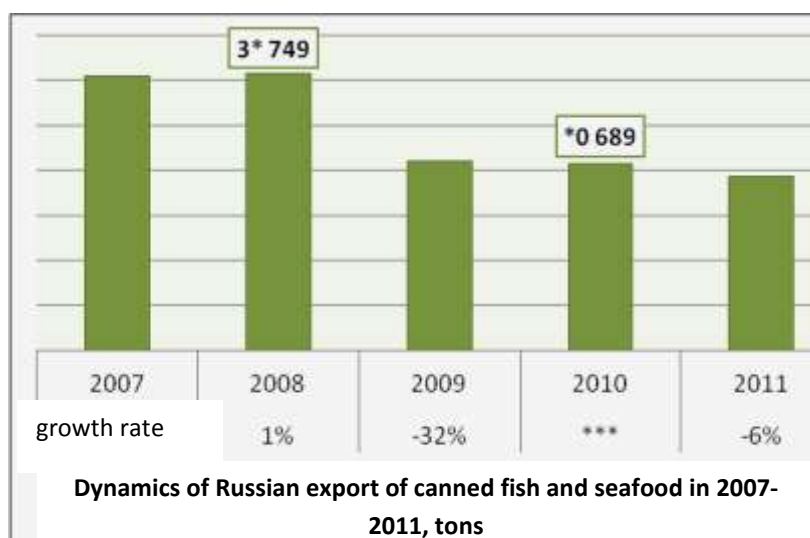


CHAPTER 17

ANALYSIS OF RUSSIAN EXPORT
OF CANNED AND SEMI-
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During last three years it is observed a reduction of deliveries of Russian canned fish and seafood on the foreign market. In 2009 volume of Russian export was reduced by ***% compared with the same rates of 2008.

According to the results of 2011 the amount of products of this type delivered to the foreign market for selling was by *% less in the previous year.



Structure of Russian export of canned fish and seafood in physical terms by categories in 2011,%

In 2011 canned *** was forming **% of Russian export. The major part of deliveries was constituted by canned fish.

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