

**Intesco
Research
Group**

FEED SUPPLEMENTS AND RUSSIAN MARKET OF FEED SUPPLEMENTS



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Subject of research:

MARKET OF FEED SUPPLEMENTS

Goal of research:

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

Regions of research:

RUSSIA

REGIONS OF RF

WORLD

Main blocks of research:

WORLD MARKET OF COMPOUND FEED

CATTLE STOCK OF AGRICULTURAL ANIMALS IN RUSSIA

VOLUME OF THE RUSSIAN MARKET OF FEED SUPPLEMENTS

FACTORS INFLUENCING THE MARKET OF FEED SUPPLEMENTS

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STATE REGULATION OF THE MARKET OF COMPOUND FEED AND FEED SUPPLEMENTS

FOR AGRICULTURAL ANIMALS AND POULTRY

DEVELOPMENTAL FORECAST OF THE RUSSIAN MARKET OF FEED SUPPLEMENTS FOR

AGRICULTURAL ANIMALS AND POULTRY FOR 2013-2016

Profiles are made for the following largest Russian enterprises:

«Novooskolskiy kombikormoviy zavod» JSC

«TK «Agros» LLC

«Zavod Premiksov N1» JSC

«VETFARM» LLC

«CELTIK RUS» JSC

Information about the main enterprises' production volume, financials of activity, balance sheet, profit and loss statements, cash flow statements, subsidiaries and some other information is also presented.

The sources of information, which are used in the research:

Federal State Statistics Service
The Ministry of Economic Development of RF
Ministry of Agriculture of RF
The Federal Customs Service
The Federal Tax Service
Industry experts' estimates
Reports on retail sales
Data of the main players of the branch
Printed and electronic publications of the branch

The research contains 57 schedules, 43 diagrams and 33 tables.

EXTRACTS FROM RESEARCH

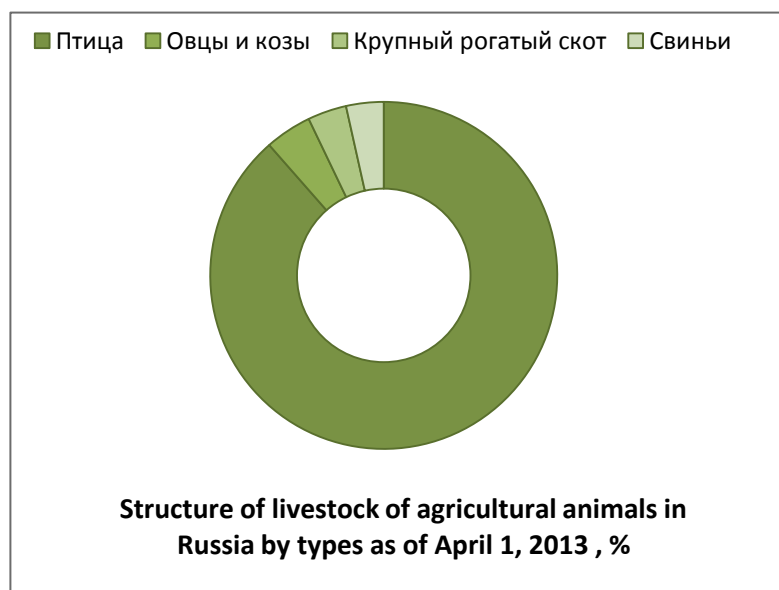
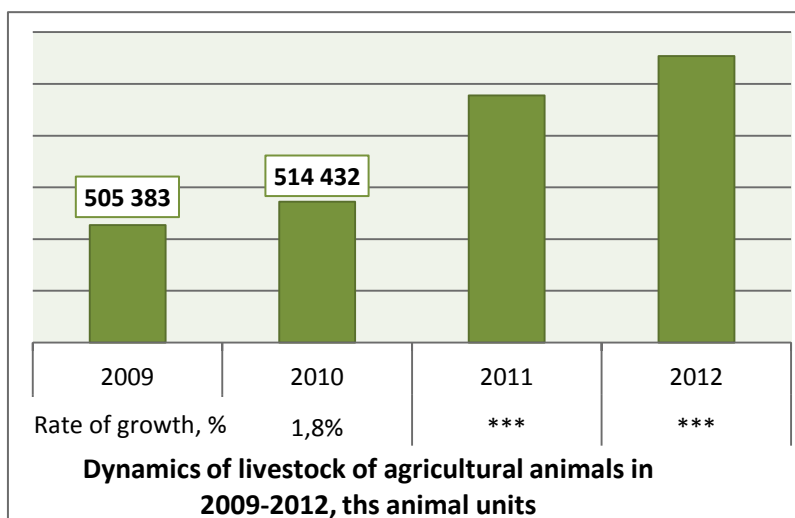
CHAPTER 4

LIVESTOCK OF
AGRICULTURAL ANIMALS
IN RUSSIA

In recent years livestock of agricultural animals increased. Since 2010 cattle stock increased by ***% or *** mln animal units. In 2011-2012 livestock increased by ***% or *** mln animal units. In 2012-2013 rate of growth amounted to ***% or *** mln animal units.

The greatest contribution to growth of a livestock was

made by poultry which possesses the greatest share in the total number of agricultural animals. In 2011-2012 the stock of poultry increased by **% and stock of sheep and goats increased by ***%. In 2012-



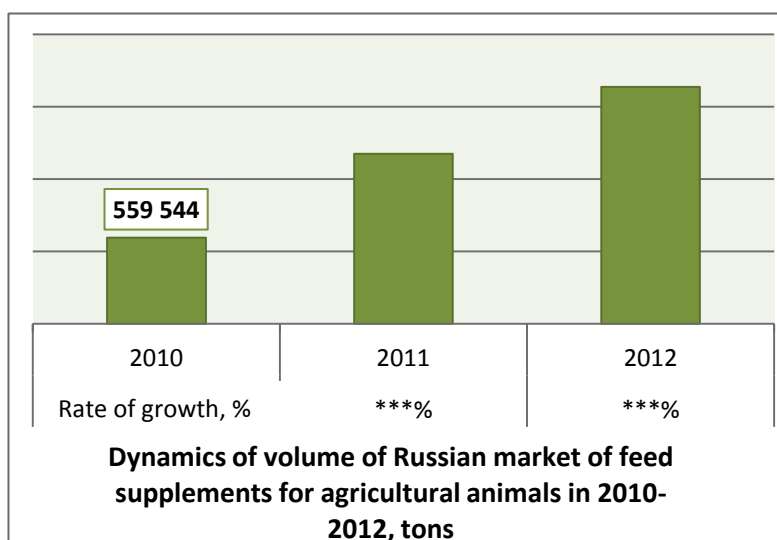
2013 the maximum growth was shown by stock of pigs which increased by 10%. Cattle stock, on the contrary, in 2010-2011 decreased (-***%) and in 2012-2013 (-***%).

As of April 1, 2013 the share of poultry was equal to ***% of total number of agricultural animals. ***% were provided by sheep, goats and cattle, the share of pigs was equal to *** %.

CHAPTER 5

VOLUME OF THE RUSSIAN
MARKET OF FEED
SUPPLEMENTS

According to Intesco Research Group, volume of the Russian market of feed supplements during 2010-2012 increased by **%, that amounts to *** ths tons of products in physical terms. At the same time in 2011 rate of growth amounted to ***% compared to the previous year, in 2012 – ***% or *** ths tons.



Imported products had about *** of the Russian market in 2012. However according to some estimates, the share of the market was lower – about ***%.

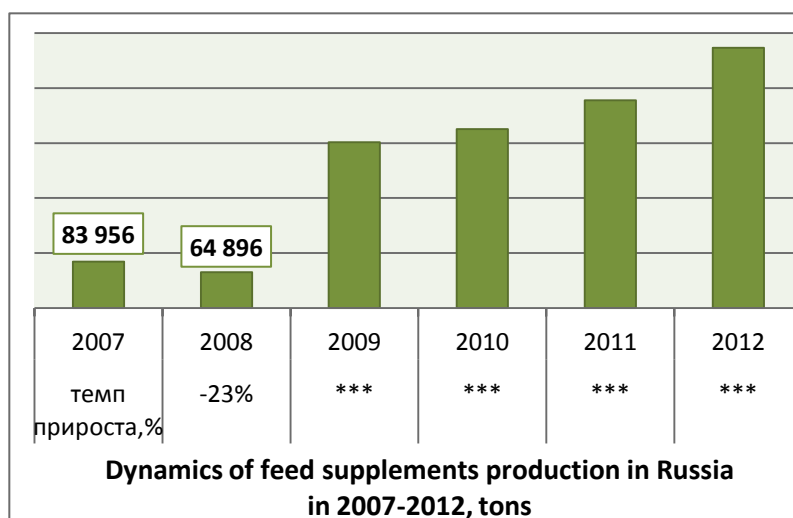
In different categories of feed supplements import content was different. For example, in the segment of antibiotics import content amounted to about ***%. The largest suppliers of medications to our country are CEVA Group, Invesa Group, KRKA D.D., Pfizer Animal Health, Zhejiang Shenghua Biok Biology, Biovet (Bulgaria) and G. Amphray Laboratories.

Import content on the Russian market feed supplements for agricultural animals in physical terms in 2012, %

CHAPTER 7

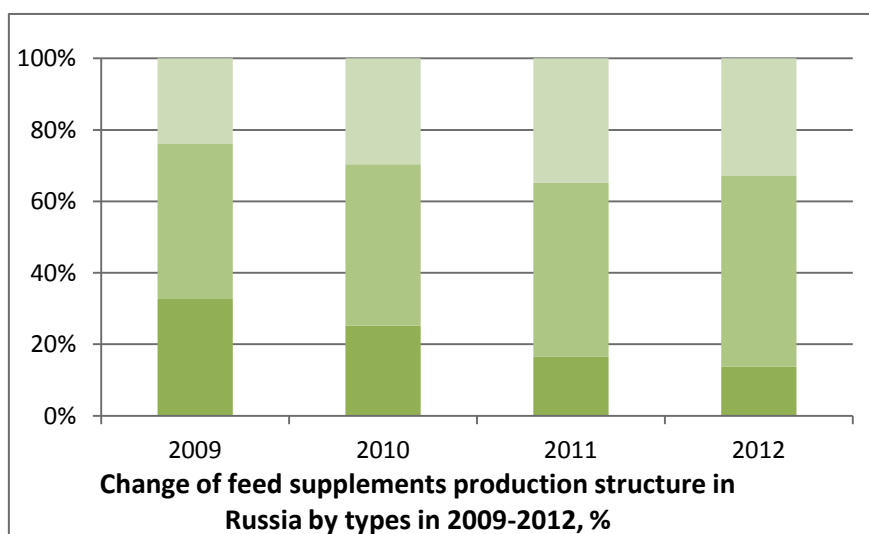
**PRODUCTION OF FEED
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Russian production of feed supplements was growing during almost all the surveyed period up to 2008, when production decreased by 23%. But in 2009 production volumes increased faster than four times. In 2012 production increased by a quarter or 25% to 83,956 tons. Compared to 2007 parameters increased by 23%.



One of the main type of additives produced in Russia during 2009-2012 was protein and vitamin supplements, the share of which increased from 22% to 33%.

The share of premixes in the structure of production increased from 22% to 33% in 2009-2011 from 22% to 33%, but in 2012 decreased by 2% to 31%. The share of feed protein in the structure of production decreased from 22% to 20%. Feed antibiotics had 20% of total volume.



CHAPTER 11

**ANALYSIS OF RUSSIAN
FODDERS IMPORT**

From 2007 up to 2009 import of fodders to Russia decreased. During three years it decreased by **% or *** thousand tons. Next two years the decrease turned into growth of import volumes: in 2010 parameters increased by 6%, and in 2011 – by ***% and reached *** thousand tons. In 2012 import volume decreased slightly: by **% or *** ths tons.



Rate of growth, %

Import of supplements in 2012 decreased by ***% to *** ths tons, it was proceeded by an insignificant growth of ***% in 2011.

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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

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.

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E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

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