



**Intesco
Research
Group**

RUSSIAN MARKET OF SUGAR



MOSCOW 2011

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INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY

METHODS OF RESEARCH

Subject of research:

MARKET OF SUGAR

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2011-2013

Regions of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

RAW MATERIALS BASE FOR PRODUCTION OF SUGAR IN RUSSIA
VOLUME OF RUSSIAN MARKET OF SUGAR
SEGMENTATION OF RUSSIAN MARKET OF SUGAR
TRENDS ON THE RUSSIAN MARKET OF SUGAR
STATE REGULATION OF SUGAR MARKET
PRODUCTION OF GRANULATED SUGAR IN RUSSIA
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Largest Russian companies with profiles:

“Dobrinsky sakharny zavod” JSC
“Sugar factory “Nikiforovsky” JSC
“Uspensky sakharnik” JSC
“Sugar and cheese producing factory “Leningradsky” JSC
“Liskisakhar” JSC

For the main companies the production volumes, financials of activity, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other data are presented.

Market segmentation:

By types of sugar

By sugar selling channels

Information sources used:

Federal State Statistics Service

Economic Development Ministry

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sale reports

Materials of the field's main players

Field print and electronic publications

The research presents 46 schedules, 31 diagram, 61 table and 1 scheme.

EXTRACTS FROM RESEARCH

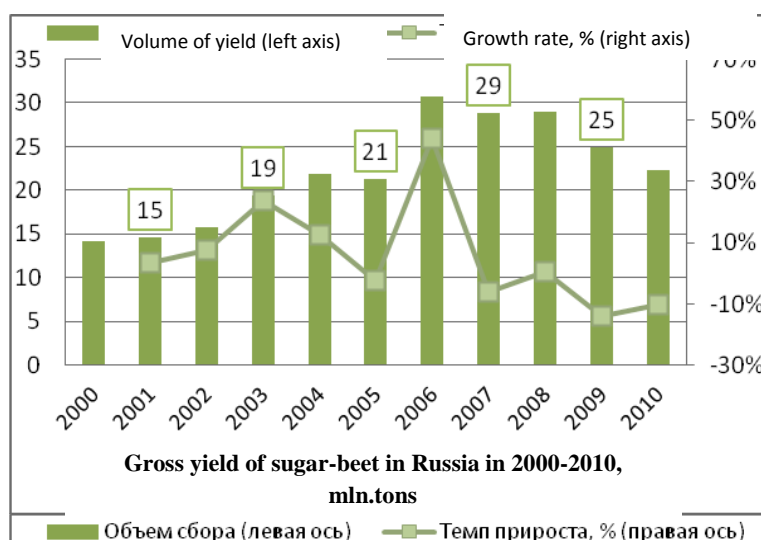
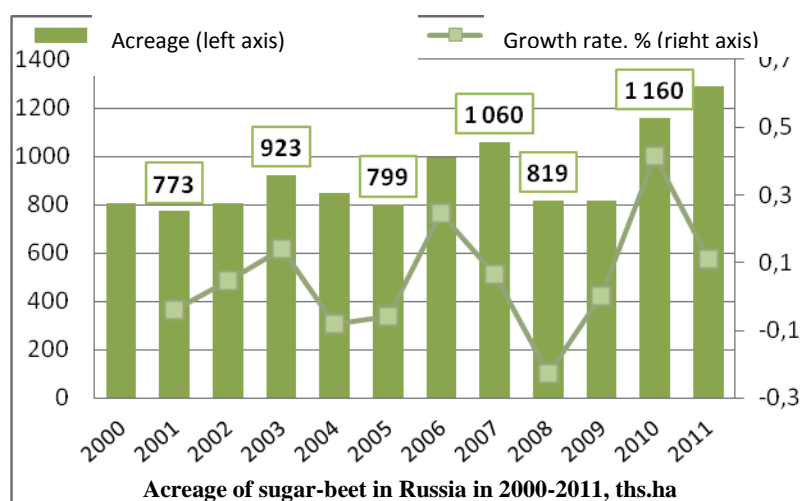
CHAPTER 3

RAW MATERIALS BASE FOR
PRODUCTION OF SUGAR IN
RUSSIA

In 2010 the acreage of sugar-beet increased by 41,6% as compared to 2009. In 2011 the growth continued and the sugar-beet acreage was *** ths. ha, which is by ***% more than a year before.

In general, yield of sugar-beet in 2000-s was increasing. However this trend was significantly disturbed by the year 2010, when the yield of sugar-beet reduced by 25%, returning to the level of 2003-

2004. Such sharp reduction is explained by the consequences of abnormal heat in summer 2010 that is why it is expected that in 2011 sugar-beet yield will be restored.



The volume of gross sugar-beet yield in 2010 reduced by *** mln. ton (by ***%). Trend to reduction was also observed in 2008-2009. In 2011, the gross yield of sugar-beet is most likely to be growing again.

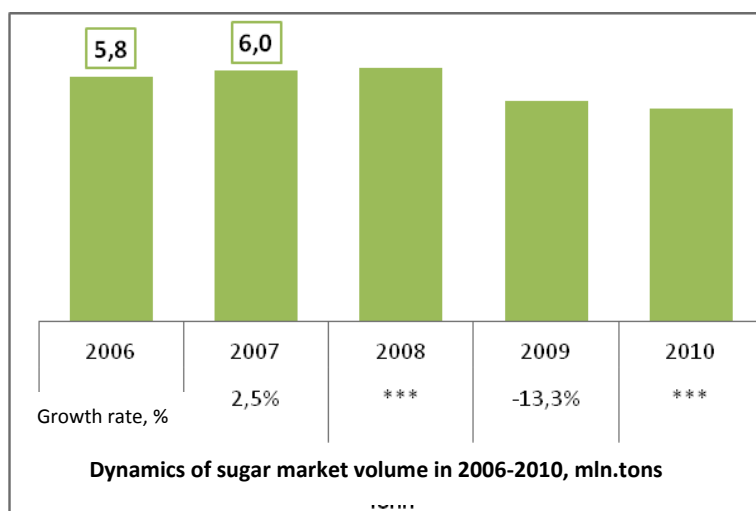
CHAPTER 4

VOLUME OF RUSSIAN SUGAR MARKET

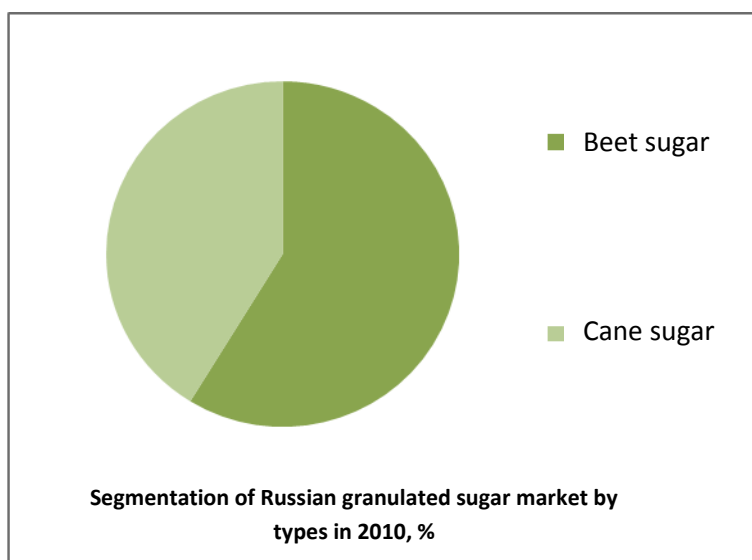
In 2010 the volume of Russian sugar market was*** mln. ton, which was by ***% less than in 2009. The reduction of volumes of sugar consumption in Russia has been observed from 2009.

The structure of Russian sugar market is by ***% presented by the sugar of domestic manufacture.

It should also be taken into account that the considerable part of domestic sugar (almost 2 mln. ton in 2010) is produced from the imported cane raw sugar. If this imported raw material is considered, than the share of domestic products is considerably less. In 2010 it amounted to ***%.



In the structure of the Russian granulated sugar market in 2010 the greater part accounted for beet sugar.



In 2008-2009 the share of cane sugar on the market was reducing. In 2009 it was ***%. However, in 2010 due to considerable reduction of Russian production of beet-root sugar and increase of cane raw sugar import on whose basis the consumer products are produced, the share of beet sugar reduced by 6,5%.

CHAPTER 7

PRODUCTION OF GRANULATED SUGAR IN RUSSIA

In 2007-2010 production of granulated sugar in Russia was reducing. In 2009 there was the maximum reduction of production volume - by 14% (831,8 ths. tons). Production of sugar in 2010 amounted to 4,8 mln. ton, which is almost by 300 ths. tons less than in previous year. Basically the trend didn't change but the rates of the production volume decrease reduced almost twice.

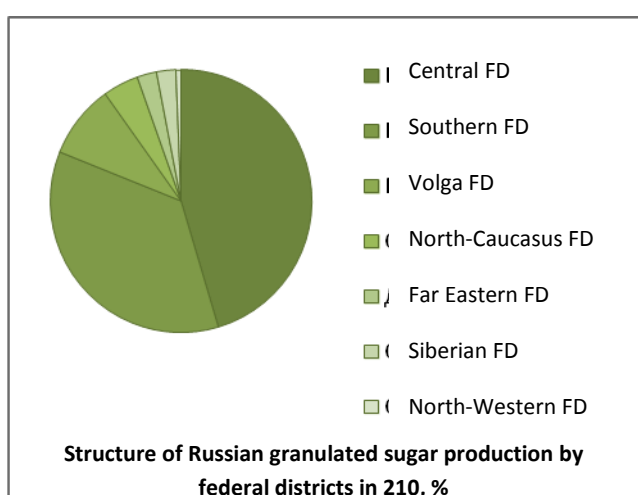
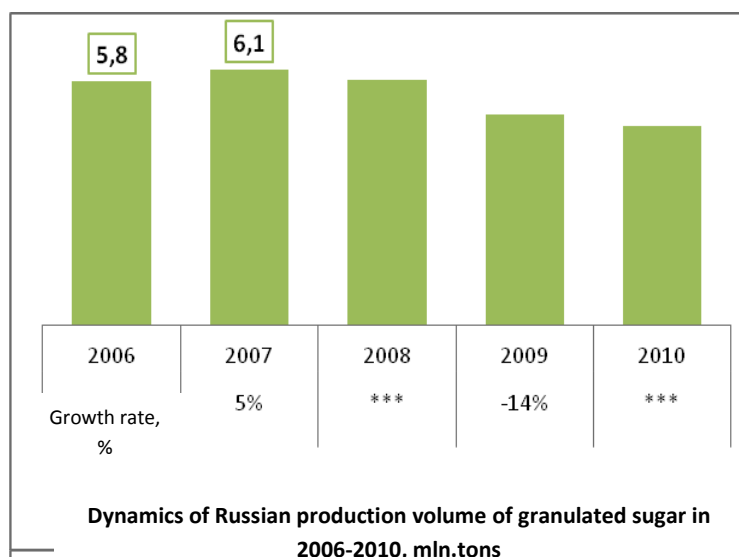
In the period from January to May, 2011 on the territory of the Russian Federation there were 513 ths. tons of granulated sugar produced, in the same period

of 2010 the production amounted to 562 ths. tons, which means the reduction amounted to 8,8%.

The largest federal district of Russia on sugar production is the Central FD. In 2010 *** mln. tons of these products were produced there. The Southern Federal District ranks second (*** mln. ton), the Volga FD – third (*** ths. tons).

The least amount of granulated sugar is produced in North-Western Federal District (*** ths. tons). Until 2008 there was no sugar production in this district at all.

In 2010 the Central Federal District accounted for ***% of total sugar production in Russia. The Southern FD – by 10% less. The share of Volga Federal District amounted to 9%.



ANALYSIS OF RUSSIAN SUGAR
EXPORT

Dynamics of Russian sugar export in 2010 was radically negative: export of these products reduced by ***%. The same sharp reduction was characteristic of 2008. In general, we may note that dynamics of Russian sugar export is not steady.

In 2010 the supplies to the external market amounted to *** ths. tons of domestic sugar.

In money terms the dynamics of Russian sugar export was also not steady. In 2010 the export of domestic sugar reduced by ***, as compared to 2007 – by ***%. Cost of domestic products on the external market in 2010 amounted to *** mln. USD.



The major part of Russian export as per the results of 2010 (*** ths. tons) accounted for Kazakhstan. Tajikistan ranked second – *** ths. tons. The volume of sugar supplies to Turkmenistan amounted to *** ths. tons. Also small volumes of products were imported by Mongolia and Uzbekistan in 2010.

Among other relatively large importers of Russian sugar in 2010 one should also mention Abkhazia, USA and Azerbaijan.

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INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY

INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY

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All works of **INTESCO RESEARCH GROUP** are based on the proven research and development methods. When conducting marketing researches and developing the business plans the group applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

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Russian market of sugar. Current situation and forecast

Our clients:



Russian market of sugar. Current situation and forecast



Russian market of sugar. Current situation and forecast



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**