



**Intesco
Research
Group**

WORLD MARKET OF MILK AND MILK PRODUCTS. RUSSIAN MARKET OF MILK AND MILK PRODUCTS



MOSCOW 2012

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ABOUT INTESCO RESEARCH GROUP COMPANY

RESEARCH METHODOLOGY

Subject of research:

MARKET OF MILK AND MILK PRODUCTS

Goal of research:

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

Region of research:

RUSSIA AND RF REGIONS

Main blocks of research:

WORLD MARKET OF MILK AND MILK PRODUCTS
YIELD OF MILK IN RUSSIA
VOLUME OF RUSSIAN MARKET OF MILK AND MILK PRODUCTS
RETAIL SALES OF MILK AND MILK PRODUCTS IN RUSSIA
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Largest Russian enterprises profiles of which were drawn up:

«VIMM-BILL-DANN» JSC

«DANON INDUSTRY» LLC
«IVMOLOKOPRODUKT» LLC
«INMARKO» JSC
«YANTAR» CJSC

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 Economic Development
Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sales reports
Materials of the field's main players
Field printed and electronic publications
Data bases of international organizations

The research presents 134 schedules, 82 diagrams and 120 tables.

EXTRACTS FROM RESEARCH

CHAPTER 3

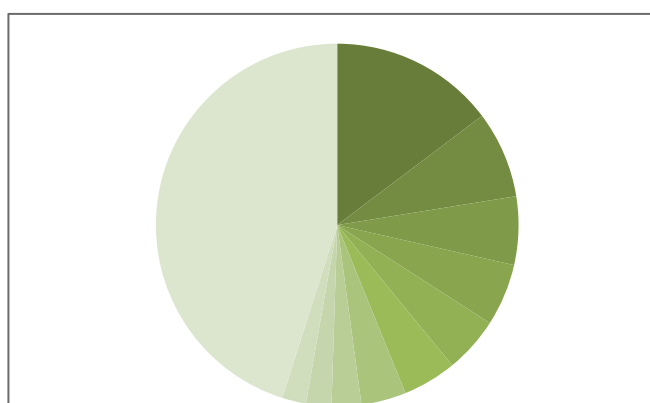
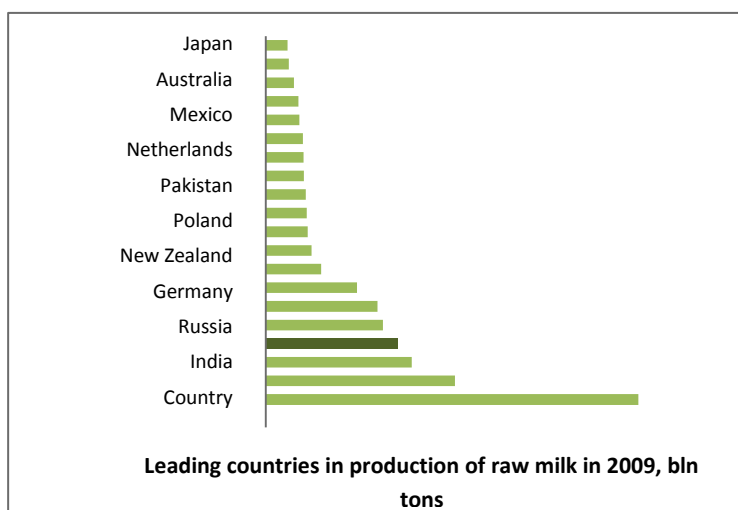
WORLD MARKET

The largest producer of raw milk in the world is ***, where in 2009 the yield volume made up *** mln ton. The second place belonged to India, the index in which made up *** mln ton less (***)).

By results of 2009 the rest five largest producers of raw milk also included *** (** mln ton), Russia(** mln ton) and *** (** mln ton). In total the world yield of milk made up *** mln ton of cow milk.

The share of the ten largest producer countries was about 55% of raw cow's milk in the world. The share of *** was **%, the share of India was twice as low. The share of ***, of Russia and of *** made up from *** to **%.

The largest importers of raw milk in the world are *** and Germany, that in 2009 imported over *** mln ton of the products. The third place belonged to Belgium with its *** ths tons. Over ***



tons of this product were also imported to Spain. The total import of raw milk made up *** mln tons, or *** bln dollars.

CHAPTER 5

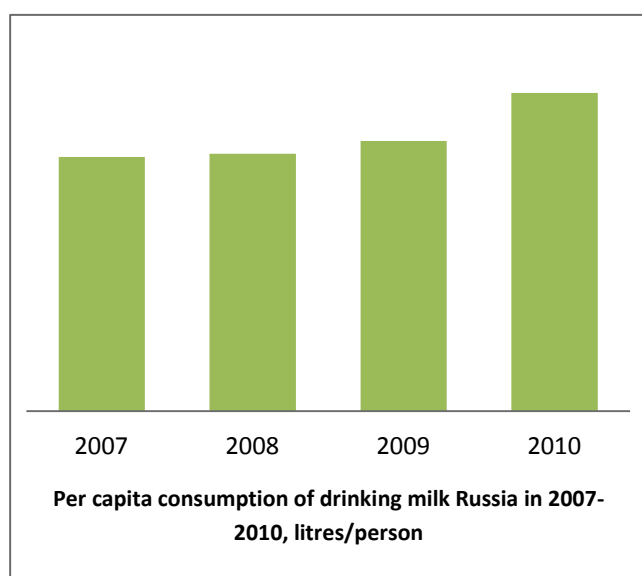
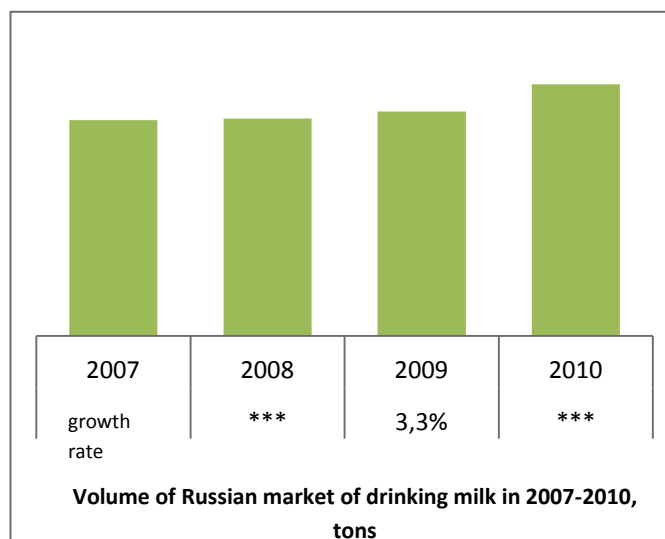
RUSSIAN MARKET VOLUME

The volume of Russian market of drinking milk (industrially-treated) in 2007-2010 steadily increased. During the crisis of 2009 the increase made up 3,3%, while in 2010, when there was a drought and a decrease in the yield, the market volume increased even more – by ***% and made up *** mln tons.

Such a low share is due to the fact that Russia rather largely imports dried and condensed milk from Belarus that is used at Russian enterprise to produce milk. Taking into account the raw materials from Belarus the import share on the market of drinking milk can reach ***%.

In 2010 per capita consumption of drinking milk in Russia made up ***

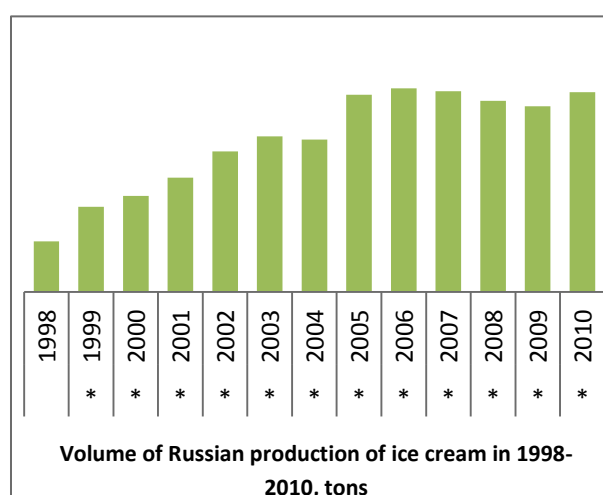
litres (*** kg). This is *** litres more than in the previous year. To compare: consumption of all milk drinks in Russia according to data of Federal State Statistics Service in 2009 made up *** litres per person, while yields of milk in RF in total in 2010 made up *** litres per person. So, the share of drinking milk in the structure of consumption of milk products makes up 14-15%.



CHAPTER 9

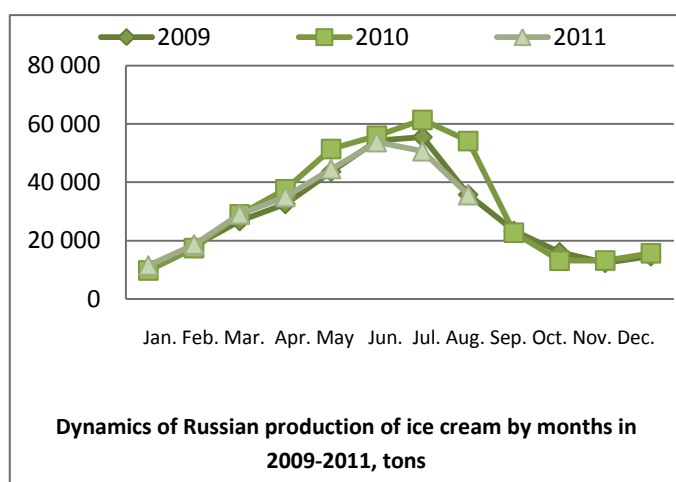
RUSSIAN PRODUCTION

Russian production of ice cream in 2010 made up *** tons, that was ***% more than in 2009. However, we can say that in total, starting from 2005, the production of these products in Russia stays almost on the same level and fluctuates insignificantly by years, probably, due to weather conditions. Specifically, the summer of 2011 was not hot (comparing to 2010), that is why ice cream consumption was rather lower than in the previous year. According to Intesco Research Group, the production volume of these products, by results of 2011, will make up *** ths tons, that is ***% less than in 2010.



After the crisis of 1998 up to 2005 the growth rates of Russian production of ice cream were greatly higher than in the second half of 2000s. The latest great growth of production was in 2005, when the increase made up 29%, while the production volume reached about *** ths tons. Since then the Russian production of ice cream, as it has been already said, has been slightly increasing or decreasing.

Russian production of ice cream is seasonal. It reaches its maximum in spring and summer.



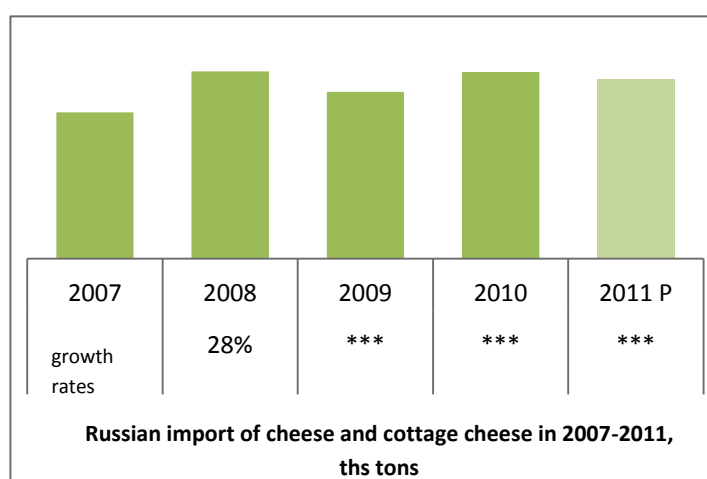
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RUSSIAN IMPORT

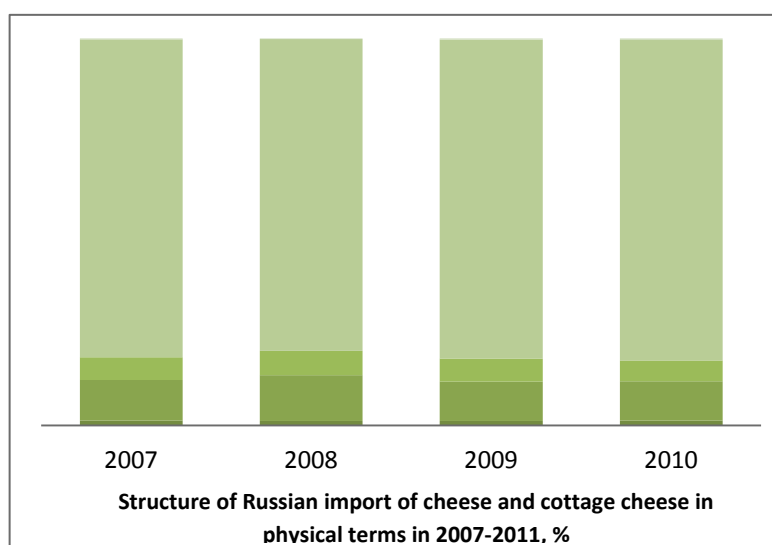
In 2010 the Russian import of cheese and cottage cheese increased by ***% and made up *** ths tons. During the crisis of 2009, on the opposite, the index decreased by ***.

In 2011, according to the forecast of Intesco Research Group, the import of cheese and cottage cheese to Russia will again decrease— by ***% – and make up *** ths tons.

The volume of supplies of milk products from Belarus to Russia are annually discussed on the ministerial level of two countries, that is why increase or decrease of import of cheese and cottage cheese from Belarus occurs not steadily (as it does as a result of market regulation), but by leaps and bounds.



After the decrease in 2009 by ***% Russian import of cheese and cottage cheese in money terms



in 2010 increased by *** and made up *** bln dollars. In 2011, according to forecast of Intesco Research Group, despite the decrease of import of the products in physical terms, due to price rises, the cost of import of cheese and cottage cheese will increase by ***% and exceed *** bln dollars.

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