



**Intesco
Research
Group**

WORLD MARKET OF BEEF. RUSSIAN MARKET OF BEEF.



MOSCOW 2012

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Subject of the research:

RUSSIAN AND WORLD MEAT MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2012-2014

Region of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

VOLUME OF THE RUSSIAN CATTLE MEAT MARKET

ANALYSIS OF MEAT RETAIL SALES

STATE REGULATION OF BEEF MARKET

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RETAIL PRICES

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FORECAST OF THE RUSSIAN BEEF MARKET DEVELOPMENT FOR 2012-2014

Largest Russian companies with profiles:

«Myasokombinat «Klinskiy» JSC;

«Myasoptitsekombinat «Penzenskiy» JSC;

«Myasokombinat Uluanovski» JSC;

«Myasozagotovitelny zavod “Cherepanovskiy” LLC;

«Labinskiy» JSC;

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

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

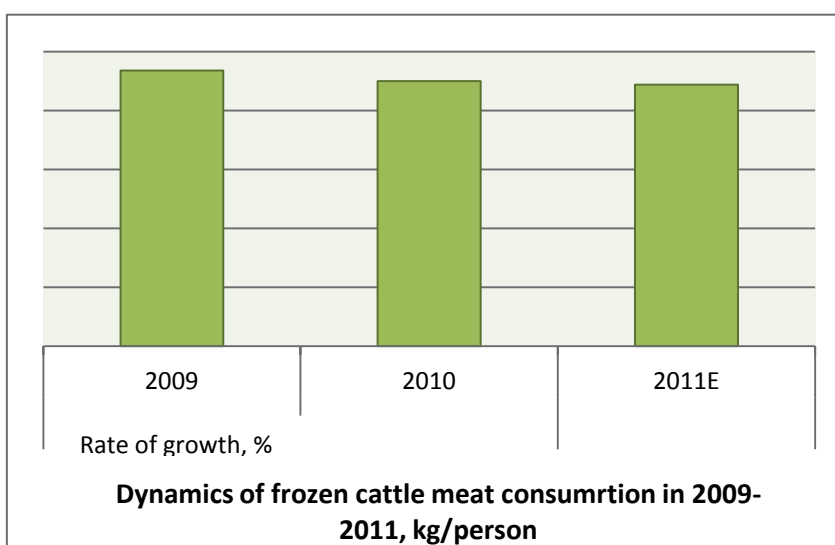
The research contains 76 schedules, 39 diagrams, 81 tables.

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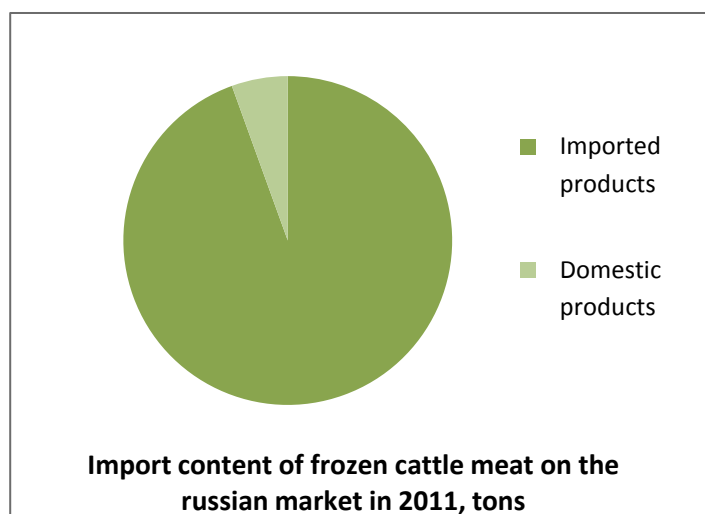
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VOLUME OF THE RUSSIAN
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In the period from 2009 till 2011 the cattle meat market *** by ***,5%. In 2011 its volume was equal to *** tons. ***ease amounted to ***%. Compared to 2010 The negative dynamics of the cattle meat market volume was primarily due to the decrease of production volumes in the country and ***.



From 2009 till 2011 the share of the foreign producers of the cattle meat on the Russian market increased. . According to Intesco Research Group specialists, in 2011 import content was equal to ***% of the Russian market, that was the maximal parameter for 3 years.



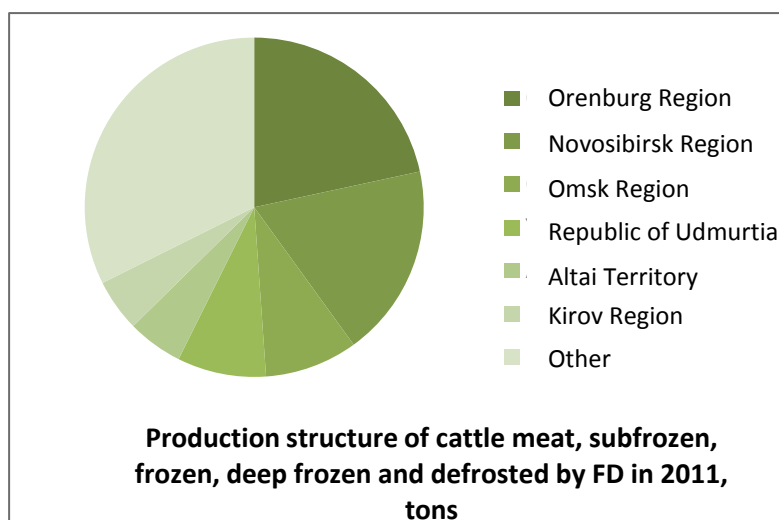
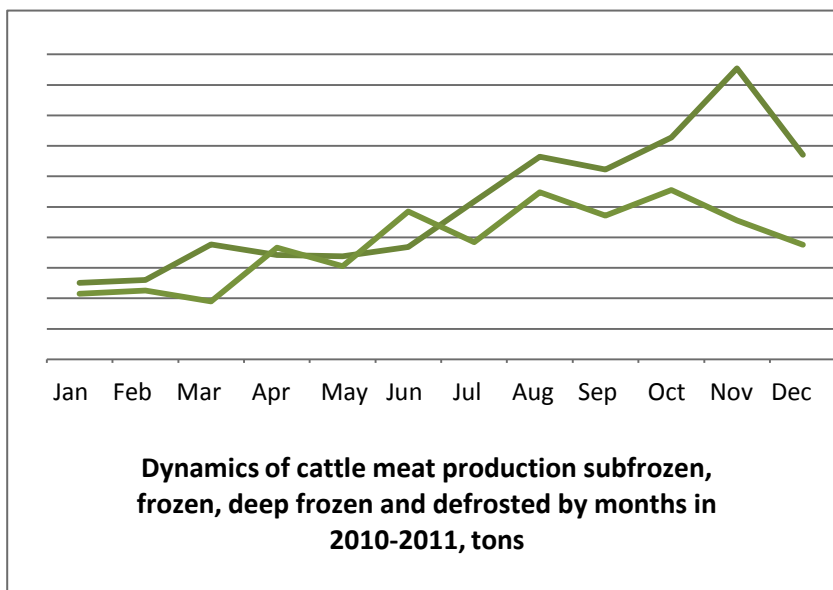
CHAPTER 11

CATTLE MEAT PRODUCTION

In 2005 there was a decrease of production volumes of cattle meat, fresh-killed, cooled and cold. In 2011 the trend continued, the decrease amounted to ***,2%. It was ***% less the level of 1999 and ***% less the maximum of 2005. Dynamics of the decrease was determined by many factors, the main of which was — ***.

*** of total frozen cattle meat production in 2011 were produced in two federal districts: *** and ***. Their total share in 2011

amounted to ***,7%. At the same time there was a redistribution of their shares in total structure of the



Russian sub-frozen, frozen, deep frozen and defrosted cattle meat production. Thus, since 2009 the share of *** FD decreased by ***, and the share of Volga FD increased by ***,7%.

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21. FORECAST OF THE RUSSIAN BEEF MARKET DEVELOPMENT FOR 2012-2014

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