



**Intesco
Research
Group**

WORLD MARKET OF PORK RUSSIAN MARKET OF PORK



MOSCOW 2012

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RESEARCH METHODOLOGY

Subject of research:

PORK MARKET

Goal of research:

ASSESSMENT OF SITUATION ON THE MARKET & FORECAST OF ITS DEVELOPMENT FOR 2012-2015

Region of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

WORLD MARKET OF PORK
POPULATION OF PIGS IN RUSSIA
VOLUME OF RUSSIAN PORK MARKET
PRODUCTION OF PORK (IN SLAUGHTER WEIGHT)
PRODUCTION OF PORK (IN FRESH-KILLED WEIGHT) BY CATEGORIES OF PRODUCTS
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TRENDS ON RUSSIAN PORK MARKET
STATE REGULATION OF PORK MARKET
PROFILES OF THE LARGEST PORK PRODUCING ENTERPRISES
FORECAST OF PORK MARKET DEVELOPMENT FOR 2012-2015

Largest Russian enterprises with profiles composed:

“PIG COMPLEX KOROCHA” CJSC
“MEAT PLANT BOBROVSKY” LTD.
“VOSTOCHNY” JSC
“AGRARIAN GROUP MP” CJSC

“AGRIFIRM ARIANT” JSC

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

Information sources used:

Federal State Statistics Service

Ministry of Agriculture of RF

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sales reports

Materials of the field's main players

Field print and electronic publications

Personal base of Intesco Research Group

The research contains 56 schedules, 43 diagrams, 75 tables and 3 schemes.

EXTRACTS FROM RESEARCH

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WORLD MARKET

Export by countries of origin

Volume of pork export in 2001-2011 had been constantly increasing with the average annual rate of ***%. The export volume during that period increased in two times and, as per preliminary estimation, exceeded in 2012 *** mln. tons.

The largest exporters of pork were the USA, Germany and Denmark, which had more than thirds of all export with their share grown up by 2011 due to increase in export from the USA. The ten largest exporting countries through all the period had more than ***% of export and by the end of decade this share grew as well.

Increase of export from the USA (*** mln. tons) and Germany (*** mln. tons) provided the overall growth of

export during the period by***%. It is important to mention that all the ten largest exporters have increased their export volume during the last five years.

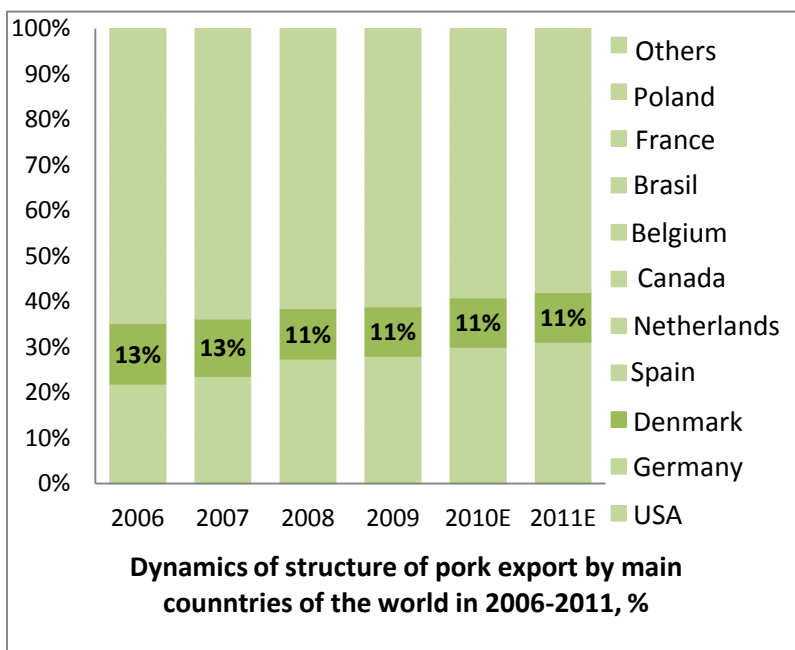


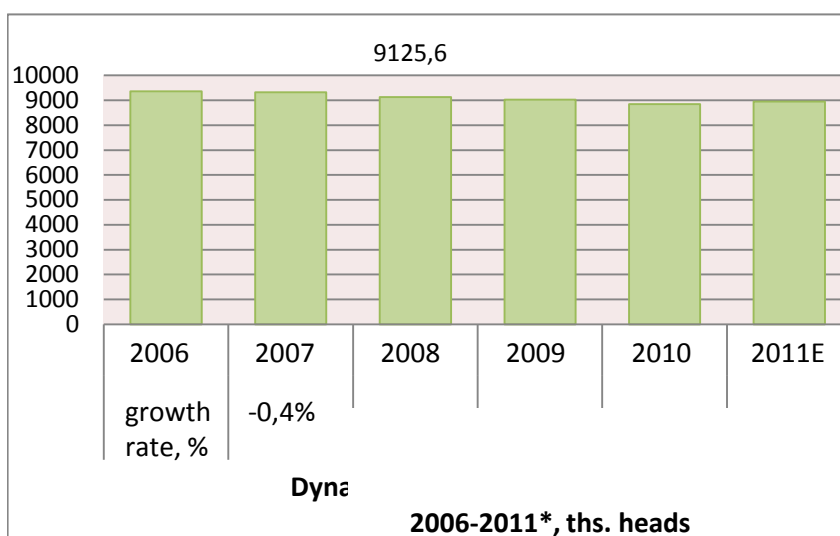
Table 3. Largest pork exporting countries in 2006-2011, tons

	2006	2007	2008	2009	2010	2011
World			12 327 273			
USA			1 689 247			
Germany						
Denmark	1 389 751					
Spain						
Netherlands			1 051 917			
Canada						
Belgium						
Brazil						
France		561 232				
Poland					282 236	
Others				1 946 126		

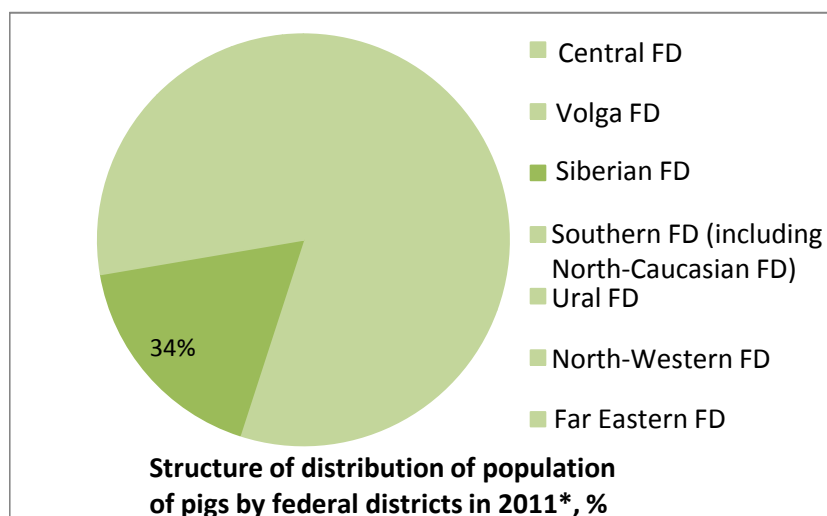
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During 2006-2010 the population of pigs in Russia had been reducing permanently and fell down to *** ths. heads through the period, up to *** mln. The average annual rate of decrease amounted to ***% or a little more than *** ths. heads. As per preliminary data, with the harvest being heavy and the government actively subsidizing agriculture, the amount of heads did not just cease reducing but go up by the very *** ths. heads by 2011.



Central and Volga FD had the highest amount of pigs through all the period. By the way, the share of Central FD has been only increasing for the last five years, first of all, due to less decrease of the amount of heads and its greater increase later on.



Central FD had about *** of overall amount of heads. Volga, Siberian and Southern FD had also significant shares. Almost 90% of total population of pigs was focused on the four districts.

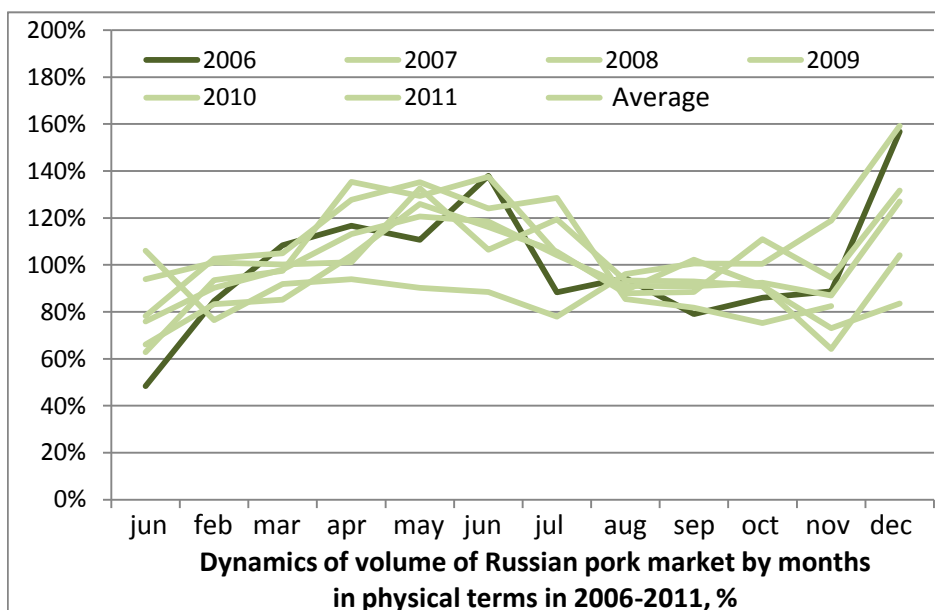
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After the trend removed and adjusted, the average monthly seasonality of import remained comparatively stable (except for extremely prominent year of 2007, however, it was marked by a general oversaturation of the market and followed by a rapid growth of pork production that

resulted in decrease of import). The increase in the second and third quarters as well as the peak in December is distinctly represented in the seasonal dynamics.



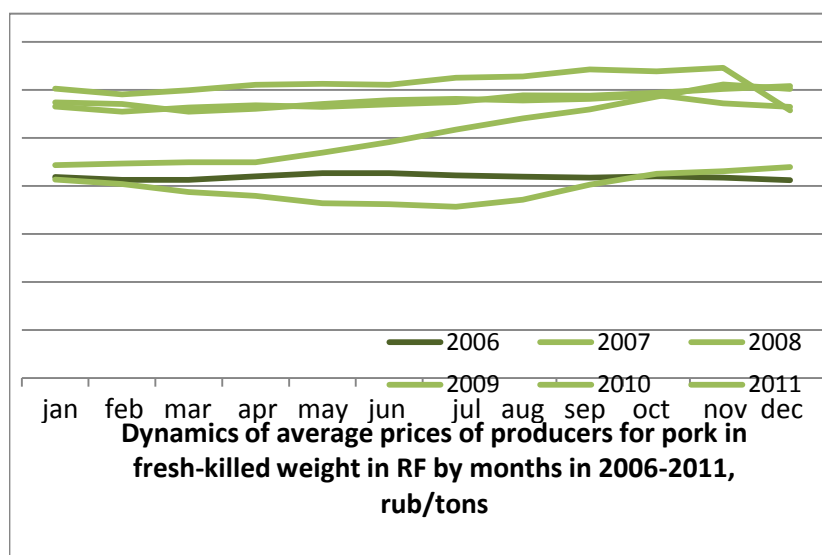
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There were no any seasonal changes in the monthly dynamics of sales prices for pork – through all the period changes were extremely smooth and caused, mainly, by microeconomic factors.

After a little decrease of average sales price in the first quarter of 2011, the price for pork had been

gradually going up, however, in December, 2011, it dropped right by *** ths. rub/tons (by ***%). Since there were no sharp drops in the previous years, possibly, such adown fall is only a mistake of the statistics or an accident fluctuation, caused by local politic events.



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18. FORECAST OF PORK MARKET DEVELOPMENT FOR 2012-2015

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Schedule 55. Dynamics of the Russian pork market (in slaughter weight) in 2006-2011 and forecast for 2012-2015, mln. rub.

Schedule 56. Dynamics of import share on the pork market (in slaughter weight) in physical terms in 2008-2011 and forecast for 2012-2015, %

ABOUT INTESCO RESEARCH GROUP

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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.

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