

**Intesco
Research
Group**

SAUSAGES AND SAUSAGE PRODUCTS. MARKET OF SAUSAGES AND SAUSAGE PRODUCTS: FORECAST FOR 2013-2016



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FOR 2014-2016****ABOUT INTESCO RESEARCH GROUP**

RESERCH METHODOLOGY

Subject of research:

MARKET OF SAUSAGES AND SAUSAGE GOODS

Goal of research:

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

Regions of research:

RUSSIA, REGIONS OF RF

Basic units of research:

VOLUME OF RUSSIAN MARKET OF SAUSAGE GOODS
ANALYSIS OF RETAIL SALES OF MEAT PRODUCTS
RAW MATERIALS BASE
PRODUCTION OF SAUSAGE PRODUCTS IN RUSSIA
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FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF SAUSAGE GOODS
FOR 2014-2016
ABOUT INTESCO RESEARCH GROUP

The largest Russian enterprises profiled:

«OSTANKINSKY MEAT-PROCESSING PLANT» OJSC
«MIKOYANOVSKIY MEAT PACKING PLANT», CJSC
«CHERKIZOVSKIY MEAT-PROCESSING PLANT», OJSC
«TSARITSYNO», OJSC
«VELIKOLUKSKIY MEAT-PACKING PLANT», OJSC

The largest enterprises are presented by production volume, financial activity, sheet balances, profit and loss statements, cash-flow statements, subsidiaries and other information.

Information sources used:

Federal State Statistics Service
Ministry of Economic Development of RF
Federal Custom Service
Federal Tax Service
Evaluation of Experts of the Branch
Retail sales statements
Data of the main players of the branch
Printed and electronic publications of the branch

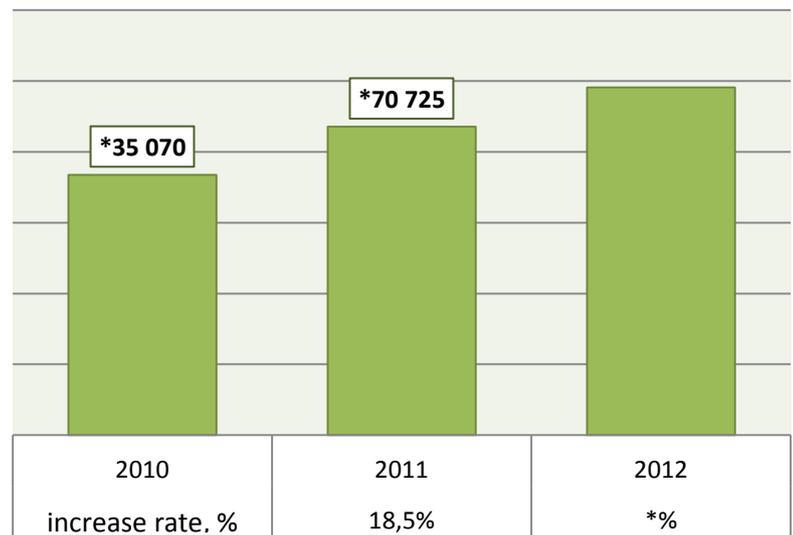
The research contains 83 Schedules, 62 Diagrams, 127 Tables, 1 Schemes

EXTRACTS FROM THE RESEARCH

CHAPTER 5

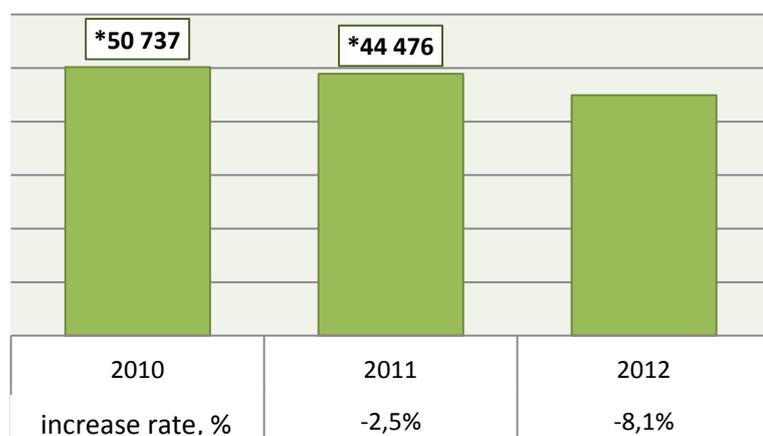
RAW MATERIALS BASE FOR
PRODUCTION OF SAUSAGES
AND SAUSAGE PRODUCTS

In 2010 – 2012 production of pork showed positive dynamics in Russia. Thus, in 2012 output volume of this meat type amounted to almost *** ths. tons, that was by 1*% more than in the previous year.



Dynamics of Russian production of pork in 2009 – 2012*, ths. tons

In 2012 production volumes of beef amounted to *** ths. tons, that was by 26,1 ths. tons less than in the previous year.



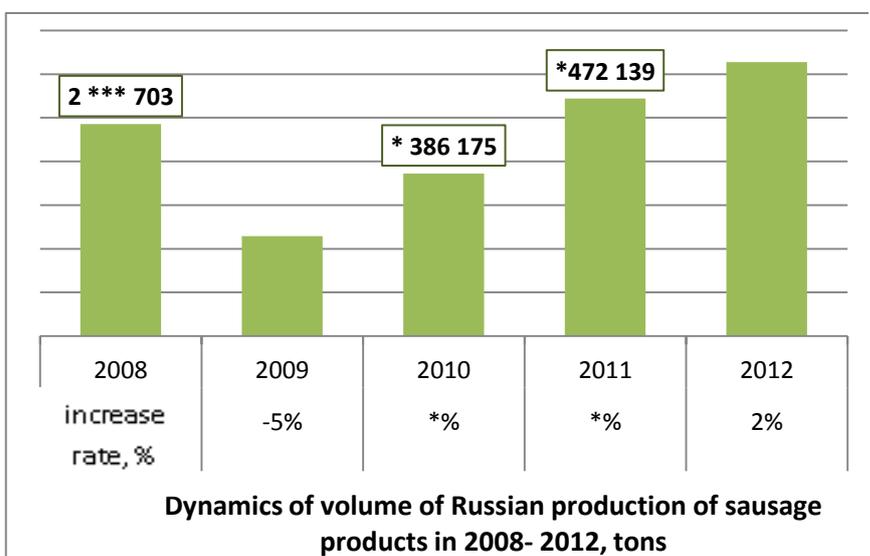
Dynamics of Russian production of beef in 2009 – 2012*, ths. t

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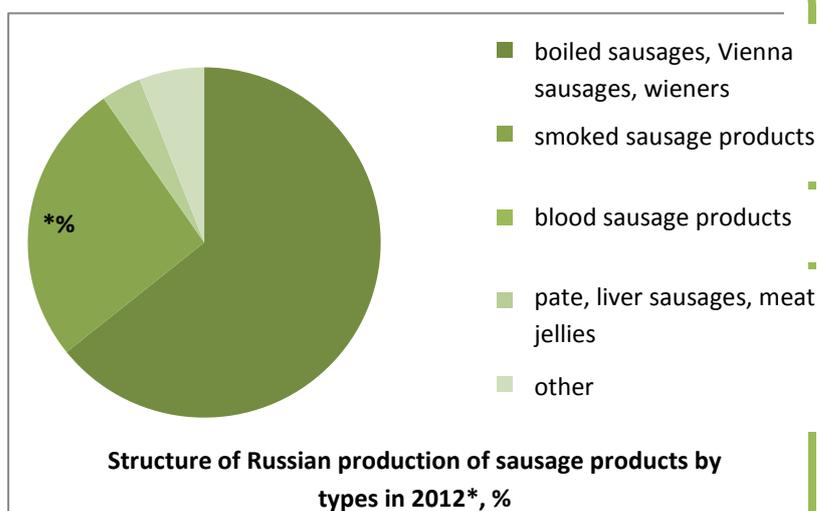
PRODUCTION OF SAUSAGE PRODUCTS IN RUSSIA

In general meat-processing branch in Russia has been showing positive dynamics since 2010. Herewith in 2010 – 2011 output of sausage goods was increasing by *% - *% per year, then, however, growth rates slowed down. Thus, according to the results of 2012 Russian production of sausage goods exceeded **, * mln. tons, that was by *, *% more than in the previous year.

About **, *% of Russian production of sausage goods is presented by boiled sausages, sausages and small sausages. Smoked sausage goods also belong



to the most important categories in the structure of supply of domestic products on the market: more than one forth of the total output (**,1%) in RF is amounted to this segment. Share of



paste, liver sausages, meat jellies in the structure of Russian production is equal to *,6%.

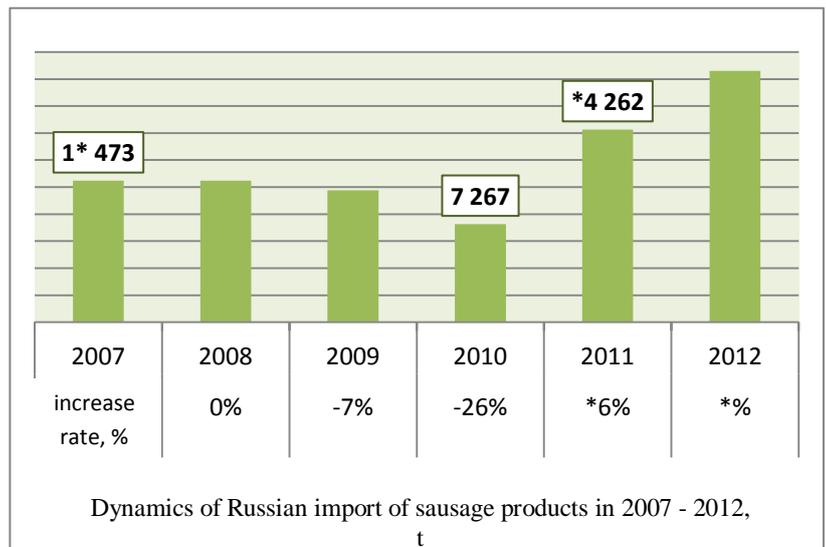
CHAPTER 14

ANALYSIS OF RUSSIAN IMPORT OF SAUSAGE PRODUCTS

During 2007 – 2010 import of sausages and sausage goods in physical terms to the territory of RF showed negative dynamics. Thus, in 2010 volume of Russian import of sausages and sausage goods amounted to 7,3 ths. tons.

In 2011 the rate sharply grew by *6% due to increase of demand for the products, import volume amounted to *4,3 ths. tons.

By the end of the period researched volumes of foreign deliveries grew by **% more to **, * ths. tons.



In 2012 products from the USA constituted one fifth of the total Russian import of sausage goods. Presence of ***, Latvia and ** constituted **%, 13% and 1*% correspondingly.



Aggregate presence of Spain and the Ukraine - *% and 6% correspondingly - made up a share proportional to them.

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