



**Intesco
Research
Group**

CONFECTIONERY PRODUCTS AND RUSSIAN MARKET OF CONFECTIONERY PRODUCTS - 2012



MOSCOW 2012

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

CONFECTIONERY GOODS MARKET

Goal of research:

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS
DEVELOPMENT FOR 2012-2015

Regions of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

ANALYSIS OF RETAIL SALES OF CONFECTIONERY GOODS IN RUSSIA
VOLUME OF THE RUSSIAN CONFECTIONERY GOODS MARKET
VOLUME OF THE RUSSIAN FLOUR CONFECTIONERY GOODS MARKET
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FORECAST OF THE CONFECTIONERY GOODS MARKET DEVELOPMENT FOR
2012-2015

Types of flour confectionery goods, researched:

Chocolate and chocolate products

Caramel

Khalva

Marmalade-pastile products

Confectionery goods of sugar, not containing cocoa

Wafers
Gallettes
Crackers
Muffins and rolled cakes
Cookies
Gingerbread and ginger cakes
Cakes and fancy cakes
Ginger cookies

Largest Russian companies with profiles:

«MARS» LLC
«ROSHEN» JSC
«KONTI-RUS» JSC
«KRAFT FOODS RUS» LLC
«ROT FRONT» 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 133 schedules, 121 diagrams and 148 tables

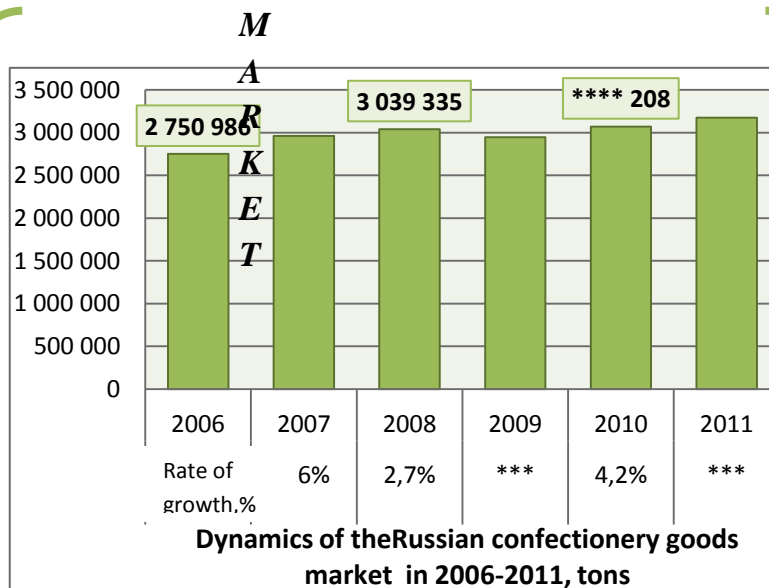
EXTRACTS FROM RESEARCH

CHAPTER 3

VOLUME OF THE RUSSIAN
CONFECTIONERY GOODS

Volume of the Russian confectionery goods market for 2011 reached *** mln tons. Compared to the previous year a growth of the market volume by **,4% or 105,6 ths tons was marked. Primarily, the positive

rate of growth was due to the increase of sugary segment, while the volume of confectionery goods production was stagnated. In 2011 this group showed the decrease by 1,1%, with the growth of sugary group by 4%.



About one tenth of the products on the Russian market was represented by foreign producers. And if on the market of sugary products import content reached one fifth, then in the segment of flour confectionery goods, imported products formed only 3% of the market due to the specifics of transportation and storage.

CHAPTER 10**CONFECTIONERY GOODS
PRODUCTION IN RUSSIA**

The minimum production parameters of confectionery goods were observed in January. The production growth occurred in the remaining period with a slight decline in the mid-year. The peak of confectionery goods production occurred at the end of the year: October-November.

During the Easter confectionery goods producers are also increasing the offer, but during the post, as a rule, the confectionery products consumption is somewhat reduced.

The leaders of flour confectionery goods production among the largest federal districts in 2010 was Central

FD. In 2011 *** ths tons of products were produced on its territory. Two times less was the supply of the enterprises of Volga FD.

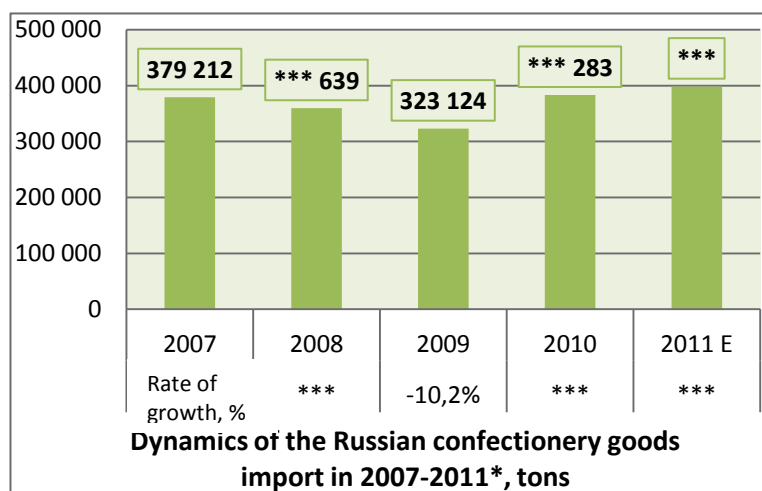
Siberian FD produced *** ths tons of confectionery goods, North-Western FD – 316,9 ths tons. The least amount was produced by North-Caucasian FD – 38,4 ths tons.



CHAPTER 19

ANALYSIS OF THE RUSSIAN
CONFECTIONERY GOODS
IMPORT

In 2008-2009 volume of confectionery goods import in Russia was characterized by a negative dynamics. But in 2010 the growth of foreign supplies of confectionery goods outlined on the territory of RF. Thus, the Russian market consumed *** ths tons of confectionery goods, that **% or *** ths tons exceeded import volume of 2009. According to preliminary data for 2011 the slowdown of rate of growth to 4% occurred, *** ths tons of sweets were imported on the territory of RF.



More than one third of the foreign supplies on the Russian market in 2011 belonged to chocolate products. The share of jam, fruit jelly, marmalades and pastes was slightly more a quarter of the total import volume (26,4%). Confectionery goods of sugar, not containing cocoa, had one fifth of the imported supplies on the

confectionery goods market, one tenth belonged to cookies. The aggregate share of imported wafers and ginger cookies in import structure did not exceed **%.

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