Intesco
Research
Group

MINERAL AND DRINKING WATER

МОСКВА 2014

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RESEARCH METHODOLOGY

Subject of research:

MARKET OF MINERAL AND DRINKING WATER

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2015-2016

Regions of research:

WORLD, RUSSIA, RF REGIONS

Main blocks of research:

WORLD MARKET OF MINERAL AND DRINKING WATER

ANALYSIS OF MINERAL AND DRINKING WATER SALES

VOLUME OF THE RUSSIAN MARKET OF MINERAL AND DRINKING WATER

SEGMENTATION OF RUSSIAN MARKET OF MINERAL AND DRINKING WATER

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FACTORS INFLUENCING THE MARKET OF MINERAL AND DRINKING WATER

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PRODUCER PRICES

RETAIL PRICES

CONSUMER PREFERENCES ON MINERAL AND DRINKING WATER MARKET

FORECAST OF THE MARKET DEVELOPMENT FOR 2015-2016

Largest Russian companies with profiles:

«KARACHINSKY ISTOCHNIK» LLC
«KAVMINVODY» JSC
«MERKURIY» LLC
«NARZAN» JSC
«VISMA» JSC

For the main companies the production volumes, financials of activity, balance sheets, profit and loss statements, cash-flow statements, subsidiaries and other data are presented.

Information sources used:

Federal State Statistics Service
Ministry of economic development of RF
RF tax service
Federal Customs Service
Expert evaluations
Materials of field establishments
Field print and electronic, business and specialized publications
Material of producing companies and market players

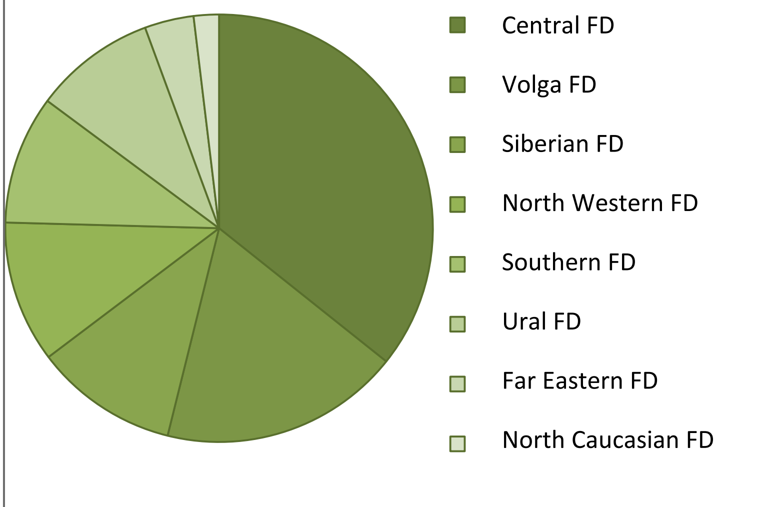
The research presents 60 schedules, 77 diagrams, 85 tables and 1 picture.

EXTRACTS FROM RESEARCH

CHAPTER 4

RETAIL SALES ANALYSIS

The leader by alcohol-free beverages consumption during the surveyed period was Central FD. In 2013 its retail sales enterprises sold the products for the sum of 91,4 billion rubles, that was *,4 billion more than in 2012. Two times less alcohol-free beverages were sold in *** FD. Here sales increased by *,7 billion rubles during a year.



Change of structure of retail sales of alcohol-free beverages by federal districts of RF in cost terms in 2010-2013, %

Retail sales structure of alcohol-free beverages in 2010-2013 was uniform, but some changes in it happened nevertheless. In 2011 the share of Central Federal District increased considerably (by * %), thus the share of Southern Federal District decreased (by 18%) though in 2010 the share of Southern federal district was equal to the share of Central federal district and made *%. Shares of other districts increased by *-* % in 2011 compared to 2010.

In 2012 the trend to growth of the Central federal district share proceeded (+* %). In general essential changes compared to 2011 did not happen.

In 2013 the share of Central FD was equal to **% of gross proceeds from alcohol-free beverages sales. Volga FD provided 18% of retailing. Shares of North Western, Southern and Siberian Fds amounted to 11%, **% and 10% respectively.

CHAPTER 20

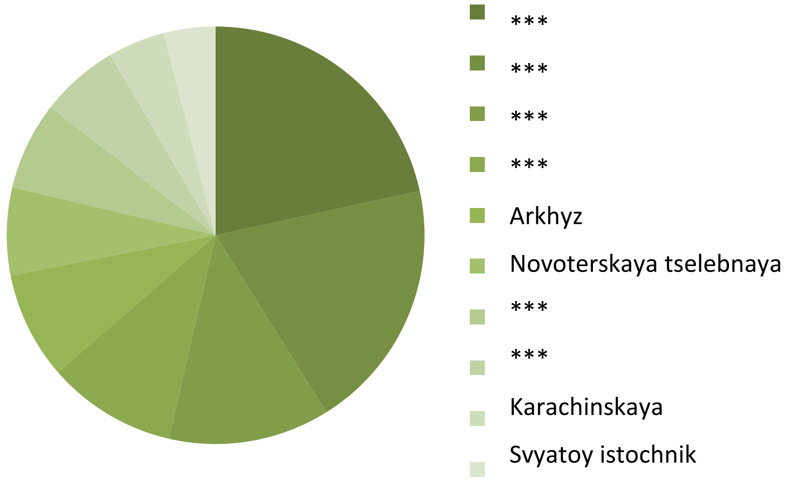
CONSUMER PREFERENCES ON THE MARKET

The most preferred brands of drinking and mineral water among Russians were Aqua ***, ***, «***» and «***». If in 2011 ** water ranked first among other brands (it was chosen by 22% of the respondents), then in 2012 this brand was preferred by **,6% only.

*** water in 2012 ranked first, as it was preferred by 26% of the respondents although in 2011 value of the parameter was equal to 21%.

10-11% in 2011 belonged to «Arkhyz» and «***» water, in 2012 the share of «Essentuki» water in drinking water consumer preferences structure increased to 10,8%, the share of «Arkhyz» water, on the contrary, decreased to *,9%.

As for consumer preferences in 2013, their structure changed. Four leading brands included «***» drinking water, the share of which increased to 10%, although in 2011 it did not exceed **,5%. So Aqua Minerale brand water ranked first which was preferred by *1,6% of the respondents. In its turn BonAqua water share decreased from ***% to ***5%.

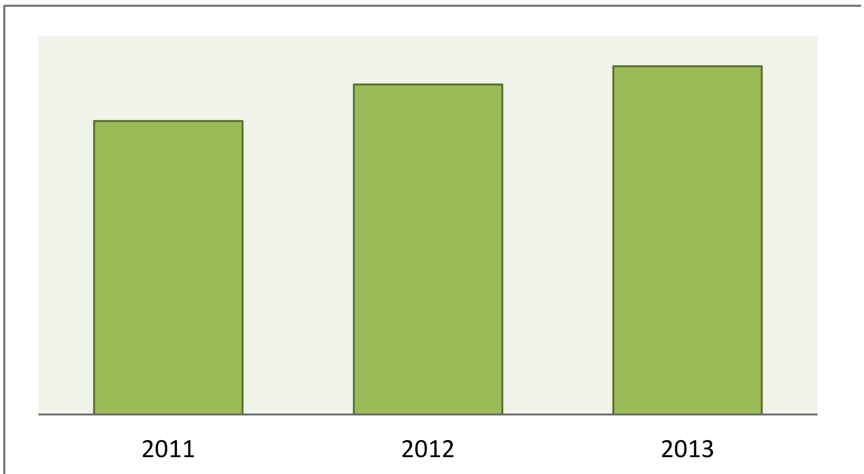


Structure of consumer preferences by brands of drinking and mineral water in 2013, %

CHAPTER 11

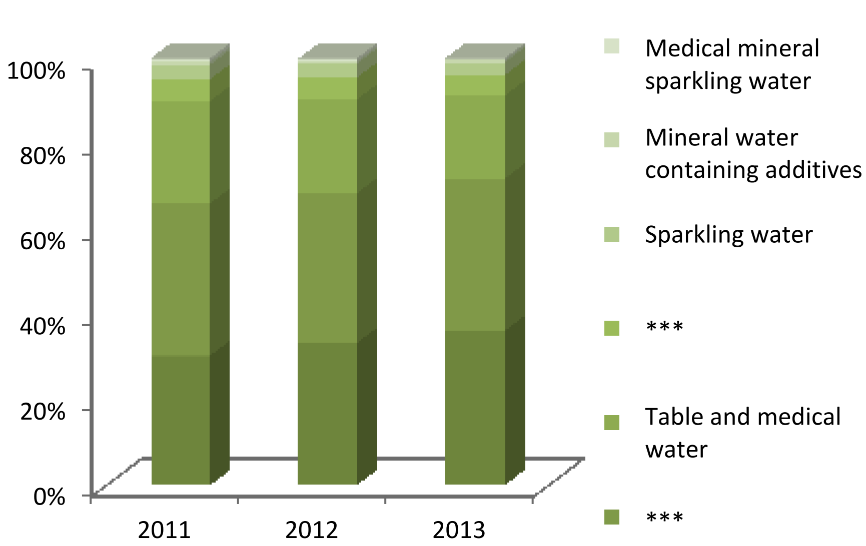
MINERAL AND DRINKING WATER PRODUCTION

Dynamics of mineral and drinking water production in Russia in 2011-2013 was characterized by a positive trend: during the surveyed three years production volume increased by over **% and by the end of 2013 amounted top over ** billion half-litres.



Dynamics of Russia mineral and drinking water production in 2011-2013 , ths half-litres

Structure of mineral and drinking water production in Russia is diverse enough today. However the greatest volume of goods production in 2011-2013 was provided by production of three types of water total share of which exceeded **%.



Dynamics of mineral and drinking water production in 2011-2013 ,%

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

ABOUT INTESCO RESEARCH GROUP

INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and Regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

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.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

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