

Intesco  
Research  
Group

# CAVIAR AND RUSSIAN MARKET OF CAVIAR



MOSCOW 2012

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**INFORMATION ABOUT INTESCO RESEARCH GROUP**

## RESEARCH METHODOLOGY

**Subject of research:**

CAVIAR AND RUSSIAN MARKET OF CAVIAR

**Goal of research:**

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2013-2015

**Regions of research:**

RUSSIA

REGIONS OF RF

**MAIN BLOCKS OF RESEARCH:**

VOLUME OF THE RUSSIAN MARKET OF CAVIAR

WORLD MARKET OF CAVIAR

TENDENCIES IN THE RUSSIAN MARKET OF CAVIAR

STATE REGULATION OF THE RUSSIAN MARKET OF CAVIAR

THE LARGEST PLAYERS IN THE RUSSIAN MARKET OF CAVIAR

RAW MATERIALS BASE

CAVIAR PRODUCTION IN RUSSIA

LARGEST RUSSIAN CAVIAR PRODUCERS

ANALYSIS OF THE RUSSIAN IMPORT OF CAVIAR

ANALYSIS OF THE RUSSIAN EXPORT OF CAVIAR

PRODUCER PRICES FOR CANNED FISH IN RUSSIA

RETAIL PRICES FOR SALMON ROE

PROFILES OF THE LARGEST CAVIAR PRODUCING COMPANIES

DEVELOPMENTAL FORECAST OF THE RUSSIAN MARKET FOR 2013-2015

**TYPES OF CAVIAR, ANALYZED IN RESEARCH:**

SALMON ROE

STURGEON ROE AND ITS SUBSTITUTES

OTHER FISH CAVIAR

**Profiles are made for the following largest Russian enterprises:**

“OKEANRYBFLOT” OJSC



“RUSSKOE MORE” CJSC

HOLDING COMPANY “DALMOREPRODUCT” OJSC

“AKROS” CJSC

“KURILSKY RYBAK” CJSC

Information about the main enterprises’ production volume, financials of activity, balance sheet, profit and loss statements, cash flow statements, subsidiaries and some other information is also presented.

**The sources of information, which are used in the research:**

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Customs Service

Federal Tax Service

Industry experts’ estimates

Reports on retail sales

Data of the main players of the branch

Printed and electronic publications of the branch

**The research contains 31 schedules, 18 diagrams, 53 tables.**

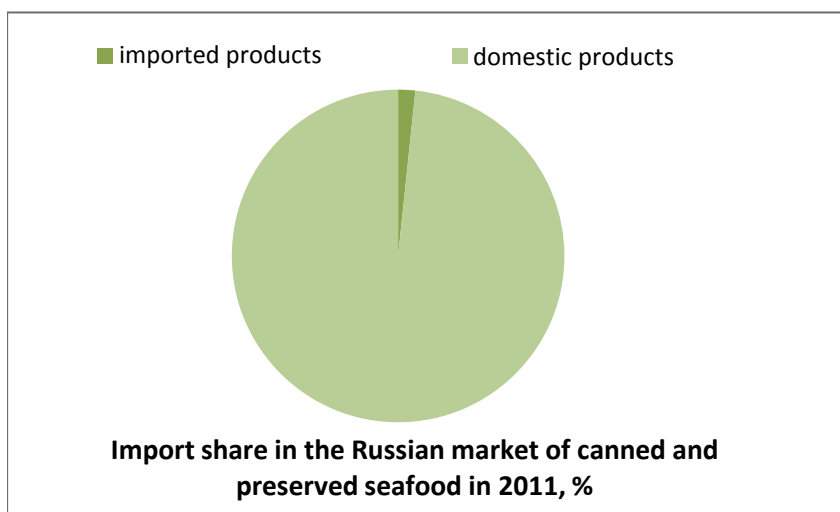
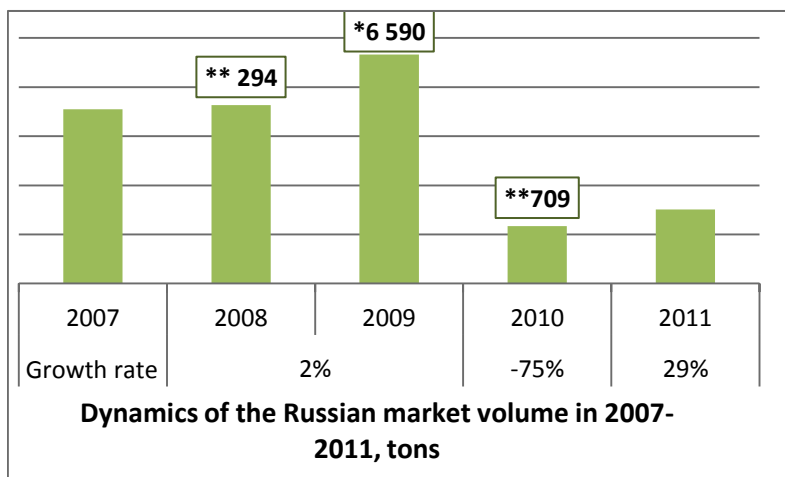
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## VOLUME OF THE RUSSIAN MARKET OF CAVIAR

The Russian market of caviar 2009 showed a stable growth until 2009. However, in 2010 there was a sudden decline in the production of salmon roe in Russia, wherefore the volume of the Russian caviar market decreased by \*5% on the whole and it amounted to \*1,7 ths. tons.

In 2011 a growth rate in the caviar market volumes was recorded (+28,8%).



Domestic production of caviar almost fully meets the needs of the domestic market. That's why the import share is not so large in the Russian market of caviar and it amounts to \*% of all the products in the market.

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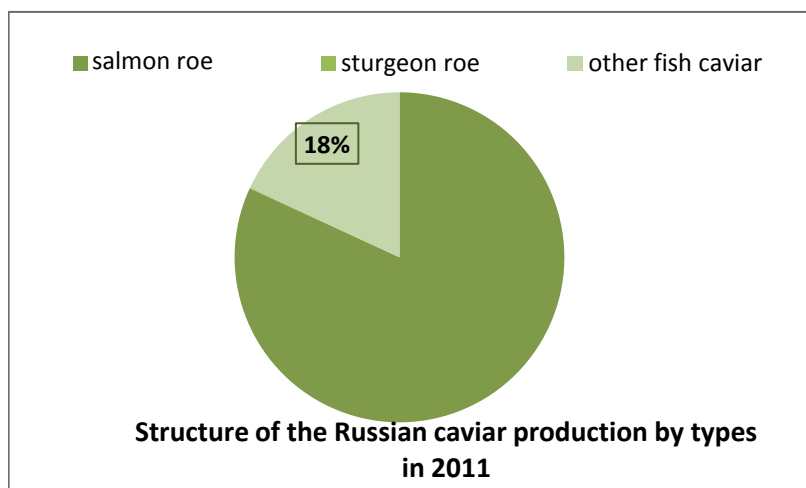
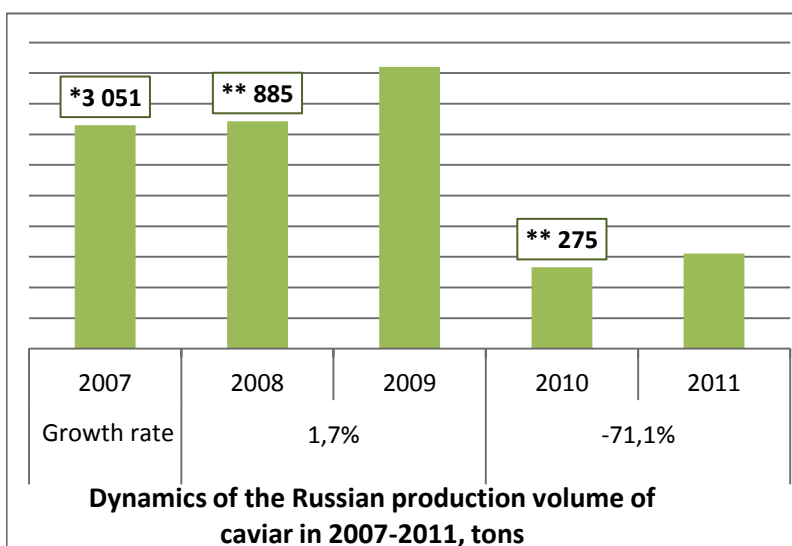
## CAVIAR PRODUCTION IN RUSSIA

In 2011 Russia produced \*\* ths. tons of caviar, that is by \*6,8% more than that of the previous year. Still it is worth noting that in 2010 there was a sudden decrease in the production volumes of caviar – by more than 3,5 times.

The maximum production volume for the period was recorded in 2009, when the volume of products amounted to almost \*\* ths. tons of caviar.

The most part of the Russian caviar production was focused on salmon roe production in 2011 (\*\*%). The share of other fish

in the structure amounted to 18%. Such a small volume of sturgeon roe production is due to a complete ban on sturgeon caviar extraction on the Russian territory.

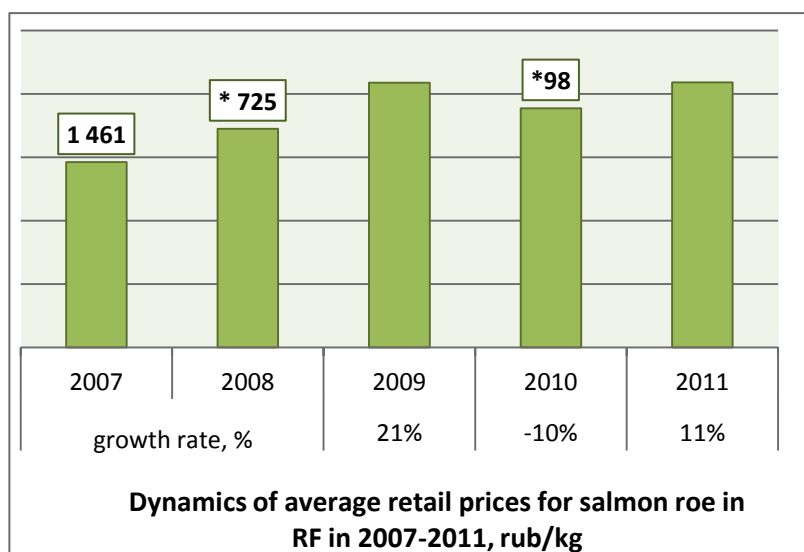


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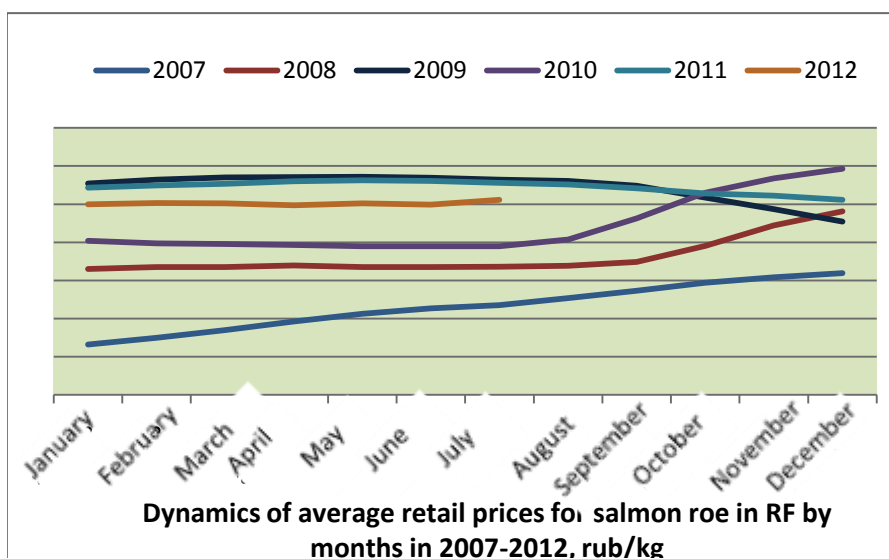
RETAIL PRICES FOR SALMON  
ROE IN RUSSIA

The retail price for red caviar in 2011 amounted to \*\*\* rub/kg, that exceeds the cost of this delicacy by 2 rub/kg in 2009. In 2010 the prices were lower by 10% in comparison with the previous year. Reducing the cost of delicacies is especially associated with a record catch of Atlantic salmon in the Far East district.

The distribution of average monthly prices in 2011 coincided with the curve of 2009. This period is characterized by a stable dynamics. The cost of



products was increasing until May, then there was a decline in prices.



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*Source: Federal State Statistics Service*

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### **ABOUT INTESCO RESEARCH GROUP**

## ABOUT INTESCO RESEARCH GROUP

**INTESCO RESEARCH GROUP** is the analytical group, having its principal directions of activity in development of high-quality business plans, feasibility studies and marketing researches of both Russia's and regional markets of RF. 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 research and development methods. When conducting marketing researches and developing the business plans the group 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.

## OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

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