

**Intesco
Research
Group**

RUSSIAN MARKET OF FROZEN SEMI-FINISHED PRODUCTS: CURRENT SITUATION AND FORECAST FOR 2013-2015



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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

MARKET OF FROZEN SEMI-FINISHED PRODUCTS

Goal of research:

ASSESSMENT OF SITUATION ON THE MARKET & FORECAST OF ITS DEVELOPMENT FOR 2012-2014

Region of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

VOLUME OF RUSSIAN MARKET OF FROZEN SEMI-FINISHED PRODUCTS
SEGMENTATION OF RUSSIAN MARKET OF FROZEN SEMI-FINISHED PRODUCTS
TRENDS ON RUSSIAN MARKET OF FROZEN SEMI-FINISHED PRODUCTS
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The segments of frozen semi-finished product market considered in the research:

MEAT SEMI-FINISHED PRODUCTS

SEMI-FINISHED PRODUCTS OUT OF FISH AND SEAFOOD

FROZEN FRUIT AND BERRIES

FROZEN VEGETABLES, MUSHROOMS AND POTATO

Largest Russian enterprises with the profiles made up:

“INVEST ALIANCE” LTD

“OSTANKINSKY MEAT PROCESSING FACTORY” JSC

“PRODUCTY PITANIYA FACTORY” LTD

“VICHUNAI-RUS” LTD

“AIS-PRODUCT” LTD

“FISH PROCESSING FACTORY” JSC

“LINA” JSC

“RAVIOLI” LTD

“ELIKA” LTD

Production volumes, financials, balance sheets, profit and loss statements, cash flow statements, subsidiary companies and other information about main enterprises are represented.

Information sources used:

Federal State Statistics Service

Ministry of economic development

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sales reports

Materials of the field's main players

Field print and electronic publications

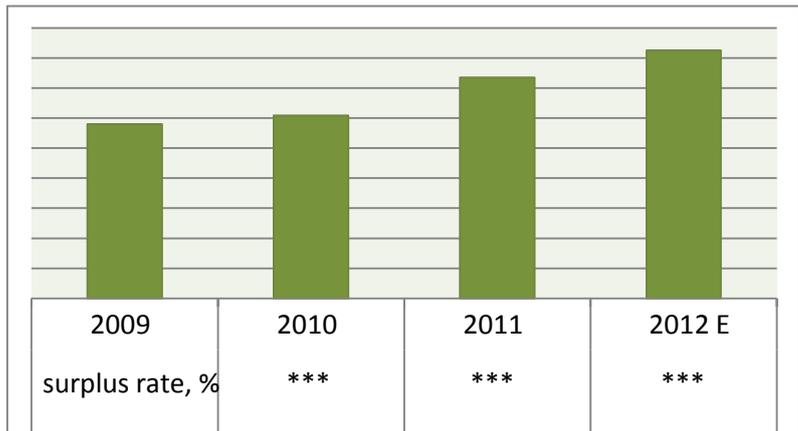
The research contains 144 schedules, 108 diagrams, 159 tables and 2 schemes.

EXTRACTS FROM RESEARCH

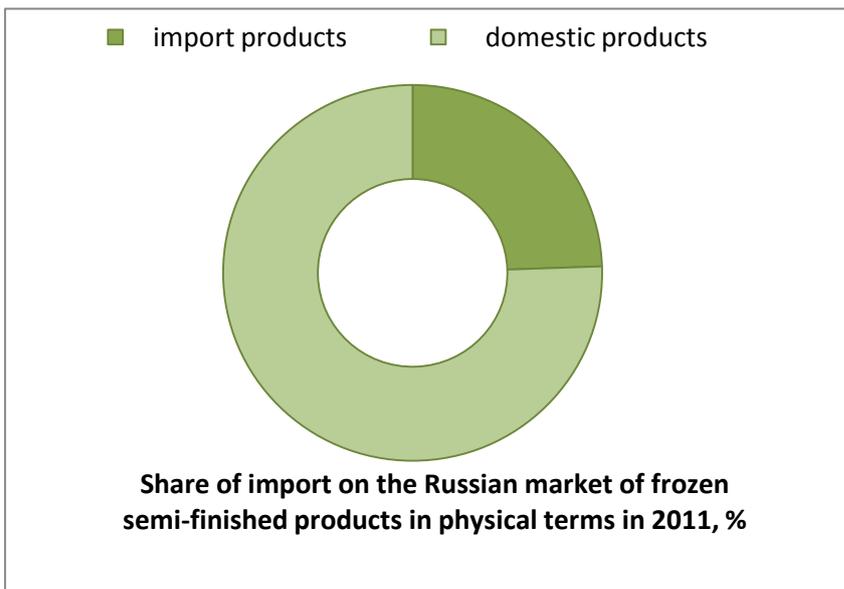
CHAPTER 3

VOLUME OF RUSSIAN MARKET OF FROZEN SEMI-FINISHED PRODUCTS

As per Intesco Research Group, the volume of domestic market of frozen semi-finished products in physical terms was *** t in 2011 having increased by *** 326 t or **, 6% in comparison with 2010. The predicted value of this index amounts to *** t in 2012 that is by **% more than market volume in accordance with the results of 2011.



Dynamics of Russian market volume of frozen semi-finished products in 2009-2012*, t



Share of import on the Russian market of frozen semi-finished products in physical terms in 2011, %

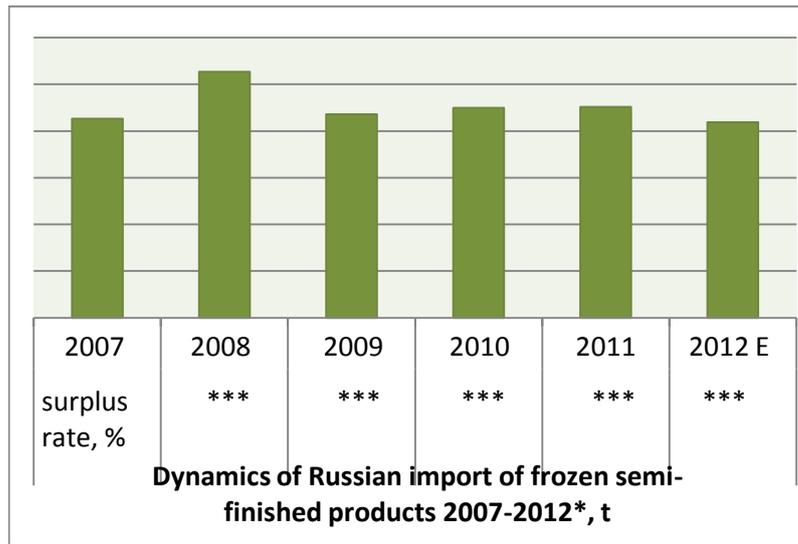
*** t of frozen semi-finished products were imported to Russia in 2011 accounting for **,5% of domestic market volume in physical terms. Thereafter the Russian products had **,5% of market.

CHAPTER 10

IMPORT OF FROZEN SEMI-FINISHED PRODUCTS

In 2010 there was an increase in delivery of products of this segment to Russia by **% or by ** t. In 2011 ** t of frozen semi-finished products were delivered to Russia.

According to Intesco Research Group estimations, the volume of domestic import of frozen semi-finished products dropped in 2012 (by **%) compared to 2011 and amounted to *** t.



As per the results of January-July, 2012, frozen vegetables, mushrooms and potato occupied ***% in the structure of Russian import of frozen semi-finished products in physical terms. Frozen semi-finished products out of fish and seafood made up fourths of deliveries (**%). **% had frozen fruit and berries. And frozen meat

semi-finished products had the smallest share at **%.

CHAPTER 11

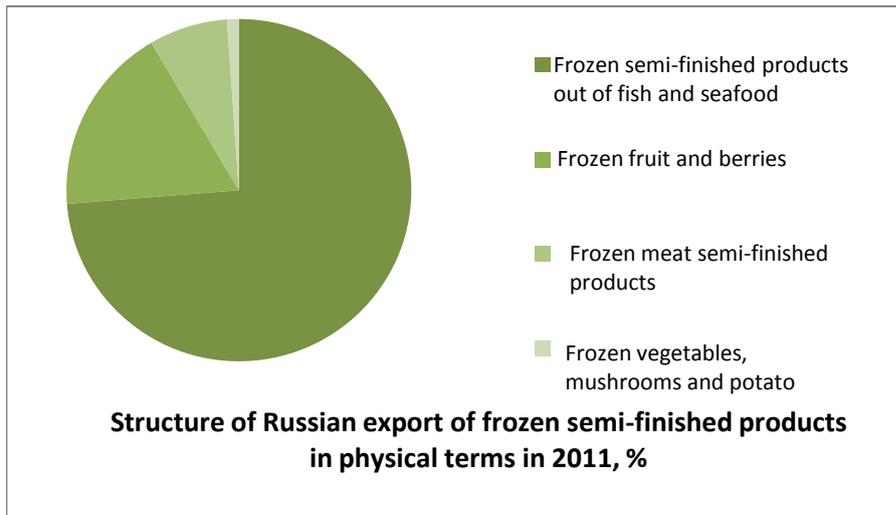
EXPORT OF FROZEN SEMI-FINISHED PRODUCTS

As per the results of 2011, 2.5 t of products were exported from Russia, that is 35% more than a year before.

As per Intesco Research Group estimations, the export volume of this product will reduce by 10% up to 2.2 t in physical terms in 2012.



Frozen semi-finished products out of fish and seafood occupied 55% in the structure of domestic export of frozen semi-finished products in physical terms in January-July of 2012. Frozen fruit and vegetables had fifths of all frozen semi-finished products exported to other countries. The share of meat semi-finished products occupied 15% in the structure of export, 10% - of frozen vegetables, mushrooms and potato.



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Schedule 139. Preferences of consumers in Moscow by types of frozen vegetables and fruit, %

Schedule 140. Frequency of purchases of frozen vegetables made by Moscow consumers, %

Schedule 141. Preferences of Moscow consumers by the places where frozen vegetables and fruit are bought, %

Schedule 142. Seasonality of consumption of frozen vegetables in Moscow, %

16. FORECAST OF RUSSIAN MARKET DEVELOPMENT OF FROZEN SEMI-FINISHED PRODUCTS FOR 2013-2015

Schedule 143. Dynamics of volume of Russian market of frozen semi-finished products in 2009-2011 and forecast for 2012-2015, t

Schedule 144. Dynamics of import share on the market of frozen semi-finished products in physical terms in 2009-2015*, %

ABOUT INTESCO RESEARCH GROUP

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INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches both on federal and regional levels 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 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 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.

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E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

Tel.: +7 (495) 645-97-22