

**Intesco  
Research  
Group**

# MACARONI PRODUCTS AND RUSSIAN MARKET OF MACARONI PRODUCTS: FORECAST FOR 2013-2015



MOSCOW 2013

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### **ABOUT INTESCO RESEARCH GROUP**

## RESEARCH METHODOLOGY

**Subject of research:**

MARKET OF MACARONI PRODUCTS

**Goal of research:**

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

**Regions of research:**

RUSSIA AND REGIONS OF RUSSIA

**Main blocks of research:**

WORLD MARKET OF MACARONI PRODUCTS  
ANALYSIS OF MACARONI PRODUCTS RETAIL SALES  
VOLUME OF THE RUSSIAN MARKET OF MACARONI PRODUCTS  
SEGMENTATION OF THE RUSSIAN MACARONI PRODUCTS MARKET  
TRENDS ON THE RUSSIAN MARKET OF MACARONI PRODUCTS  
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CONSUMER PREFERENCES OF THE RUSSIANS  
FORECAST OF MACARONI PRODUCTS MARKET FOR 2013-2016

**The market is segmented:**

BY TYPES OF MACARONI PRODUCTS  
BY GROUPS OF MACARONI PRODUCTS  
BY THE SHARE OF IMPORTED/DOMESTIC PRODUCTS  
BY CLASSES OF MACARONI PRODUCTS  
BY METHODS OF MACARONI PRODUCTS PACKING  
BY PRICE RANGES MACARONI PRODUCTS  
BY TECHNOLOGY OF MACARONI PRODUCTS PRODUCTION

**The largest players on the market of macaroni products, researched:**

«MAKFA» JSC  
«INFOLINK» GC («SI GROUP»)  
«1-YA MAKARONNAYA KOMPANIYA» (GC « ECOOFFICE»)  
OBEDINENIE «SOYUZPISHEPROM»

**The largest enterprises with profiles:**

«MAKFA» JSC  
«KKHP AFTER GRIGOROVICH» JSC  
«EXTRA M» JSC  
«MELNIK» JSC  
«LIPETSKKHLEBMACARONPROM» 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

**Research contains 102 schedule, 106 diagrams, 133 tables and 2 schemes.**

## EXTRACTS FROM RESEARCH

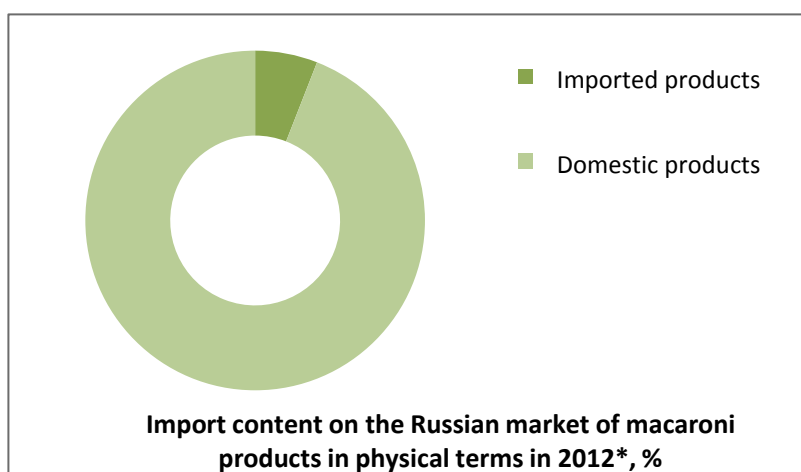
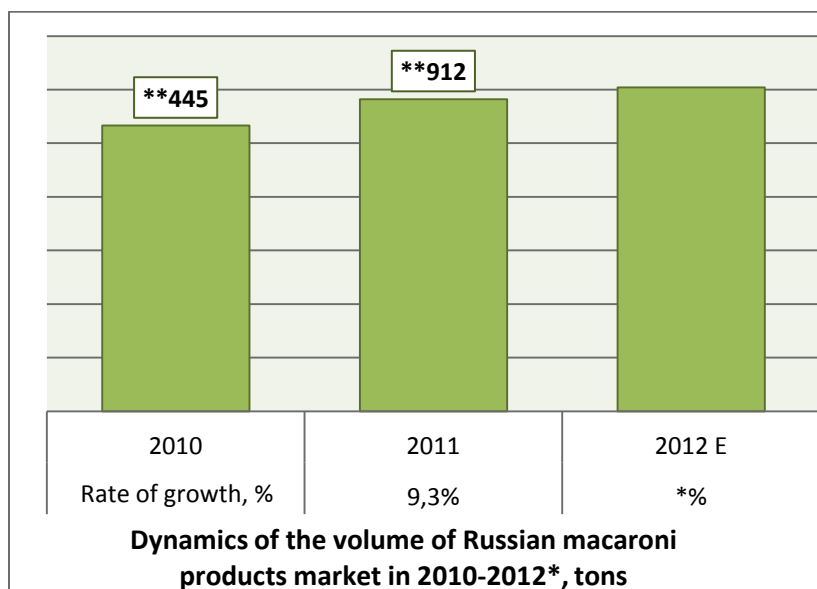
## CHAPTER 5

VOLUME OF THE RUSSIAN  
MACARONI MARKET

Volume of the Russian market of macaroni products in 2012 amounted to \*,\* mln tons. Compared to the previous year the growth of 44,3 ths tons or \*,8% was marked.

The main volume of the Russian market of macaroni products in 2012 according to analysts of Intesco Research Group, belonged to domestic products (\*%). Import

content on the domestic market in 2012 was equal to about \*%.

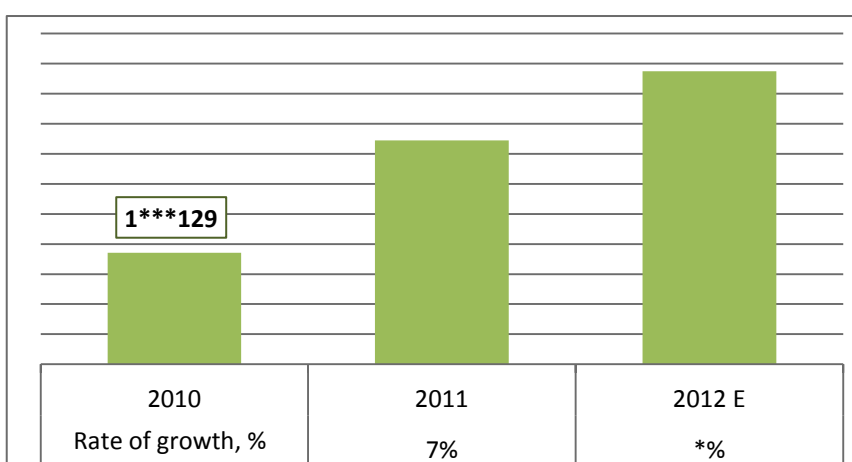


## CHAPTER 11

MACARONI PRODUCTION IN  
GENERAL

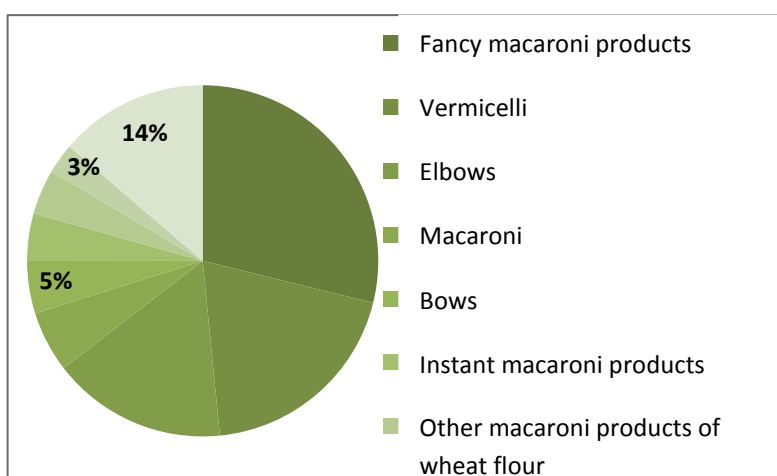
In 2010-2012 Russian production of macaroni products increased by \*1%, or \*20,8 ths tons in physical terms. Thus, by 2012 volume of these goods production amounted to \*,\* ths tons, that was \*% more, than in the previous year.

In 2012 structure of the Russian macaroni production products by types about one third belonged to fancy macaroni products (\*\*%). Almost one fifth of total Russian macaroni production products was formed by vermicelli production (\*\*%). 3% less belonged to elbows in this



Dynamics of the Russian production of macaroni products  
in 2010-2012\*, tons

structure. Production of macaroni and bows in 2012 had the shares of \*% and \*5% respectively.



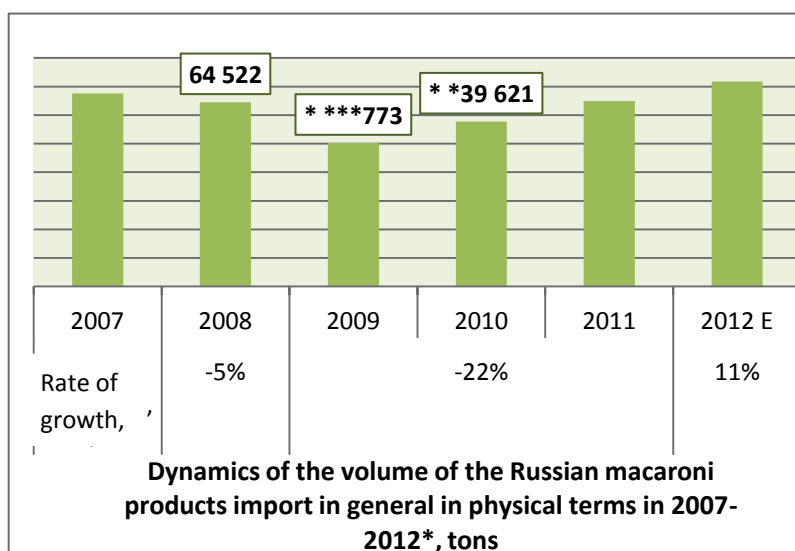
Structure of the Russian production of macaroni  
products by types of in 2012\*, %



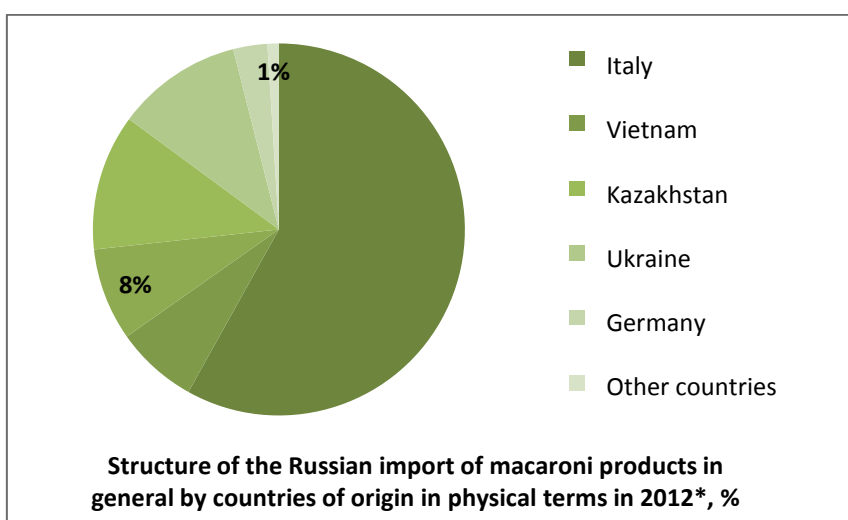
## CHAPTER 18

ANALYSIS OF MACARONI  
PRODUCTS IMPORT

Dynamics of the volume of the Russian macaroni products import since 2009 showed a growth. Thus, in 2011 import of these products to Russia amounted to \*\* ths tons, that was 1\*% more, than in the previous year and was 2,7 ths tons more than the maximal one in the pre-crisis period (2007). In 2012 according to analysts of Intesco Research Group, Russia consumed \*\* ths tons of foreign macaroni products 11% more, than in 2011.



In 2012, according to analysts of Intesco Research Group, the largest share of imported supplies of macaroni products was represented by goods of Italian production \*\*%. About \*2% belonged to Vietnam in the structure of macaroni products import by countries. 1% less belonged to Korean products.



In 2012 shares of import supplies from China and Ukraine differed with 1%: \*% and \*% respectively.

## LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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#### LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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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.

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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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