

**Intesco
Research
Group**

MILK AND CREAM. RUSSIAN MARKET OF MILK AND CREAM: FORECAST FOR 2013-2016



CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	12
EXTRACTS FROM RESEARCH.....	14
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES.....	18
ABOUT INTESCO RESEARCH GROUP.....	32

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Number of population

The largest cities

Social standards of living dynamics

Economic activity

1.2. Economic situation

Dynamics of economy development

Stability of the state budget

1.3. Position of Russia in the world

The share of RF in the world population

2. SUBJECT OF RESEARCH

2.1. Definition and characteristics of milk

2.2. Industrial processing of milk and milk products

2.3. Classification of milk and milk products

Classification of milk by technology of processing

Classification of milk products by kinds

Classification of milk by ARCP

Classification of milk by ARCPEA

Classification of milk by FEA CN

Classification of milk RNCEA

3. WORLD MARKET OF MILK AND CREAM

3.1. Production

Production of milk

Production structure

3.2. Foreign trade

Import

Export

3.3. Powdered milk

3.4. Consumption of milk products

3.5. Prices for milk products

3.6. Trends..... Ошибка! Закладка не определена.

4. CATTLE LIVESTOCK IN RUSSIA

4.1. Cattle stock (in general)

Dynamics of cattle stock by years

Structure of cattle livestock

4.2. Dairy herd

Dynamics by years

Cattle stock in federal districts

Cattle stock in regions

5. YIELD OF MILK IN RUSSIA

5.1. Productivity of cows in Russia

Average Russian productivity

Productivity by kinds of farms

Productivity in some regions of Russia

5.2. Production of raw milk in Russia

Dynamics by years

Production structure by kinds of farms

Production in federal districts

Production in regions

6. VOLUME OF THE RUSSIAN MARKET OF MILK AND CREAM

6.1. Drinking milk

Dynamics by years

Import content on the market

Per capita consumption of drinking milk

6.2. Cream

Dynamics by years

Import content on the market

Per capita consumption of cream

6.3. Powdered milk and cream

Dynamics by years

Import content on the market

Per capita consumption of powdered milk

6.4. Condensed milk and cream

Dynamics by years

Import content on the market

Per capita consumption of condensed milk and cream

7. CONSUMPTION OF MILK AND MILK PRODUCTS IN RUSSIA

7.1. Overall consumption

Dynamics by years

Consumption structure by federal districts

The largest regions by overall consumption of milk and milk products in Russia

Regions of Russia with the lowest overall consumption of milk and milk products

Regional consumption structure

7.2. Per capita consumption

Dynamics by years

Per capita consumption in regions of RF

8. ANALYSIS OF RETAIL SALES IN RUSSIA

8.1. Drinking milk

Dynamics by years

Dynamics by quarters

Retail sales in federal districts

Retail sales in regions

8.2. Milk drinks

Dynamics by years

Dynamics by quarters

Retail sales in federal districts

Retail sales in regions

8.3. Powdered and condensed milk

Dynamics by years

Dynamics by quarters

Retail sales in federal districts

Retail sales in regions

9. STATE REGULATIONS OF THE MARKET OF MILK

9.1. State regulations

List of GOSTs for milk and milk products

Control of milk products

Powdered milk

9.2. Support of producers and processors of milk

Price regulations

Quality control and adulteration combating

«Shkolnoe moloko» program

9.3. Foreign trade regulation

Custom regulation

WTO

Countries of Customs Union

10. TRENDS ON THE RUSSIAN MARKET OF MILK PRODUCTS

11. RUSSIAN PRODUCTION OF MILK AND CREAM

11.1. Use of production capacities

11.2. Commissioning of new production capacities

11.3. Drinking milk production

Production structure by types

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.4. Production of liquid and pastelike milk products for early age children

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.5. Whole-milk products production (in milk equivalent)

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.6. Drinking milk production for early age children

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.7. Cream production

Production structure by types

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.8. Powdered milk and cream production

Production structure sukhogo moloka by types

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.9. Powdered baby milk production, including sour-milk

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts and regions

11.10. Production of condensed milk products

Production structure by types

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.11. Condensed milk production

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.12. Production of condensed milk products with food products and additives

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts

Production structure by federal districts

Production volumes in regions

Regional production structure

11.13. Condensed cream production

Dynamics of production volumes by years

Dynamics of production volumes by months

Production volumes by federal districts and regions

12. THE LARGEST RUSSIAN PRODUCERS OF MILK AND CREAM

12.1. By volumes of production (up to 2009)

Drinking milk

Cream

Powdered milk and cream

Condensed milk and cream

12.2. By volumes of revenues (up to 2011)

Production of processed liquid milk

Production of solid forms of milk and cream

Production of condensed milk products

13. THE LARGEST PLAYERS ON THE MARKET OF MILK AND CREAM

13.1. «Vimm-Bill-Dann» JSC

Company profile

History of the company development

Range of products, brands

Development strategy

13.2. «Danon Unimilk»

Company profile

Range of products, brands

Development strategy

13.3. «Ehrmann»

Company profile
History of the company development
Range of products, brands
Development strategy

13.4. «Campina»

Company profile
History of the company development
Range of products, brands
Development strategy
Associations and unions

14. DISTRIBUTION CHANNELS ON THE RUSSIAN MARKET OF MILK PRODUCTS

15. ANALYSIS OF THE RUSSIAN EXPORT OF MILK AND CREAM

15.1. Drinking milk and cream

Dynamics by years
Dynamics by months
Export volume by countries of destination
Export structure by countries of destination

15.2. Powdered and condensed milk and cream

Dynamics by years
Dynamics by months
Export volume by countries of destination
Export structure by countries of destination

16. ANALYSIS OF THE RUSSIAN IMPORT OF MILK AND CREAM

16.1. Drinking milk and cream

Dynamics by years
Dynamics by months
Import structure by types
Import volume by countries of origin
Import structure by countries of origin

16.2. Powdered and condensed milk and cream

Dynamics by years
Dynamics by months
Import volume by countries of origin
Import structure by countries of origin

17. PRODUCER PRICES FOR MILK AND CREAM IN RUSSIA

17.1. Milk

*Drinking milk**Liquid and pastelike milk products for early age children*

17.2. Cream

17.3. Powdered milk and cream

*Powdered milk with fatness over 1,5%**Powdered milk not fat**Powdered baby milk*

17.4. Condensed milk and cream

18. RETAIL PRICES FOR MILK AND CREAM IN RUSSIA

18.1. Drinking milk

18.2. Powdered milk and cream

*Whole powdered milk**Powdered baby milk*

18.3. Condensed milk and cream

19. STRUCTURE OF RETAIL PRICE FOR MILK**20. CONSUMER PREFERENCES ON THE RUSSIAN MARKET OF MILK**

20.1. Consumption of milk products

20.2. The most popular brands

21. PROFILES OF THE LARGEST ENTERPRISES BY WHOLE MILK PRODUCTION

21.1. «VIMM-BILL-DANN» JSC

*Reference information**Types of activity**Production volumes**Balance sheet**Profit and loss statement**Cash flow statement**Financials*

21.2. «UNIMILK» COMPANY» JSC

*Reference information**Types of activity**Balance sheet**Profit and loss statement**Cash flow statement**Financials*

21.3. «DANONE INDUSTRY» JSC

Reference information

Types of activity

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

21.4. «CAMPINA» LLC

Reference information

Types of activity

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

21.5. «Ehrmann» LLC

Reference information

Types of activity

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

22. FORECAST OF THE RUSSIAN MARKET OF MILK AND CREAM DEVELOPMENT FOR 2013-2016.

22.1. Drinking milk

22.2. Cream

22.3. Powdered milk and cream

22.4. Condensed milk and cream

ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

MARKET OF MILK AND CREAM

Goal of research:

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

Region of research:

WORLD, RUSSIA AND RF REGIONS

Main blocks of research:

GENERAL ECONOMIC SITUATION IN RUSSIA

WORLD MARKET OF MILK AND CREAM

CATTLE LIVESTOCK IN RUSSIA

YIELD OF MILK IN RUSSIA

VOLUME OF THE RUSSIAN MARKET OF MILK AND CREAM

CONSUMPTION OF MILK AND MILK PRODUCTS IN RUSSIA

ANALYSIS OF RETAIL SALES IN RUSSIA

STATE REGULATIONS OF THE MARKET OF MILK

TRENDS ON THE RUSSIAN MARKET OF MILK PRODUCTS

ROSSIYSKOE PRODUCTION OF MILK AND CREAM

THE LARGEST RUSSIAN PRODUCERS OF MILK AND CREAM

THE LARGEST PLAYERS ON THE MARKET OF MILK AND CREAM

DISTRIBUTION CHANNELS ON THE RUSSIAN MARKET OF MILK PRODUCTS

ANALYSIS OF THE RUSSIAN EXPORT OF MILK AND CREAM

ANALYSIS OF THE RUSSIAN IMPORT OF MILK AND CREAM

PRODUCER PRICES FOR MILK AND CREAM IN RUSSIA

RETAIL PRICES FOR MILK AND CREAM IN RUSSIA

STRUCTURE OF RETAIL PRICE FOR MILK

CONSUMER PREFERENCES ON THE RUSSIAN MARKET OF MILK

FORECAST OF THE RUSSIAN MARKET OF MILK AND CREAM DEVELOPMENT FOR 2013-2016

The largest Russian enterprises with profiles:

«VIMM-BILL-DANN» JSC
«UNIMILK» COMPANY» JSC
«DANONE INDUSTRY» JSC
«CAMPINA» LLC
«EHRMANN» LLC

The research includes the main enterprises' production volumes, financial performance of activities, balance sheets, profit-and-loss reports, cash-flow statements, subsidiary enterprises and other information.

Information sources used:

Federal State Statistics Service
Ministry of Agriculture of RF
Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sales reports
Materials of the field's main players
Field printed and electronic publications

The research presents 118 schedules, 99 diagrams, 3 schemes and 90 tables..

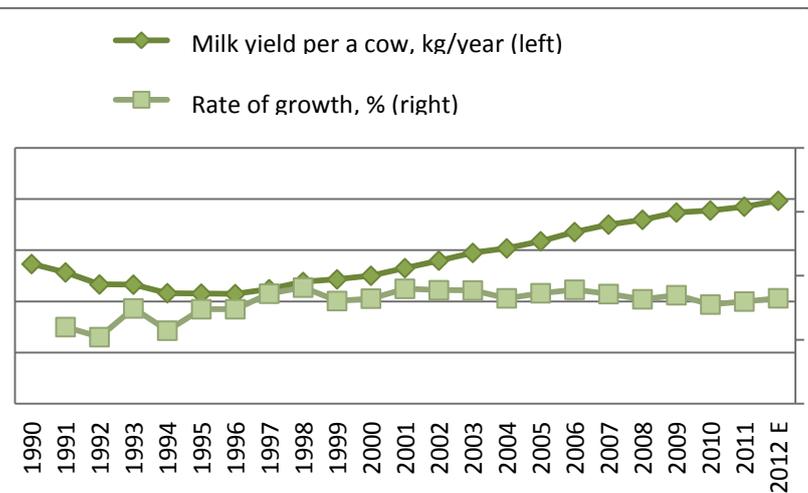
EXTRACTS FROM RESEARCH

CHAPTER 5

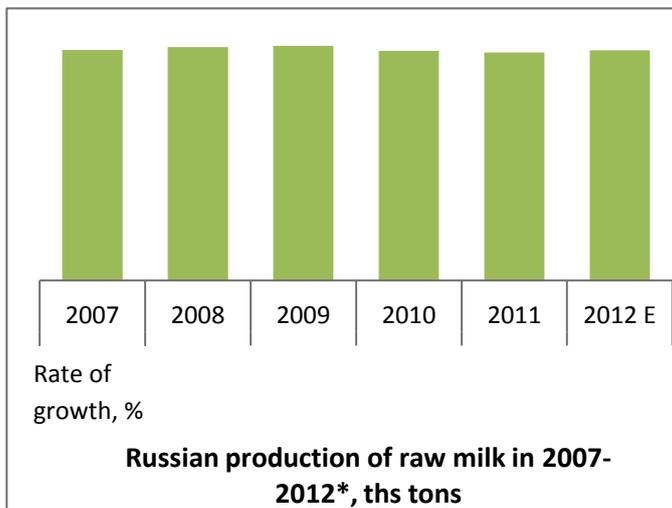
MILK YIELD IN RUSSIA

Productivity of cows in Russia, from the mid-1990-s increases constantly. The maximal rate of growth was marked in 1998-2006. By 2010 productivity reached 3776 kg of milk from one cow a year, 1632 kg more, than in 1996, milk yield was minimal.

According to experts of Intesco Research Group, in 2012 parameter of milk yield per one cow amounted to *** kg/year, that ***% exceeded the parameter of 2011 or by *** kg/year.



Yield of milk per cow in Russia in 1990-2012*



Rate of growth, %

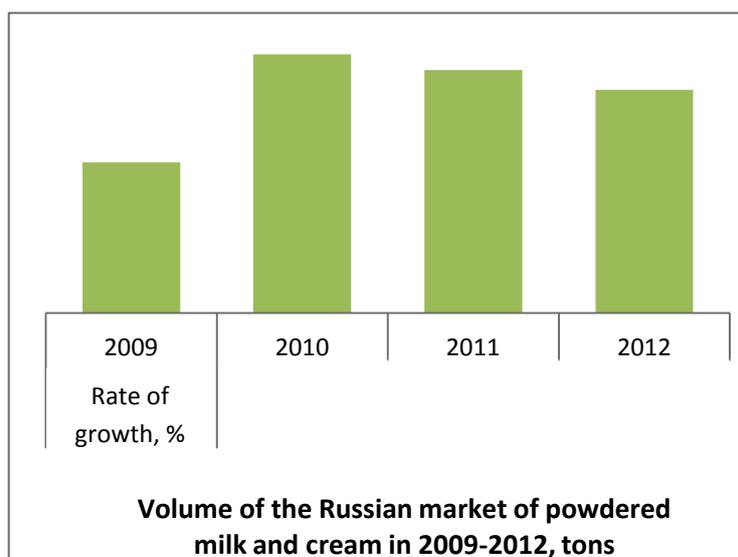
Russian production of raw milk in 2007-2012*, ths tons

For comparison in developed countries of Europe and the world productivity of cows amounted to over *** ths kg a year. In Great Britain and Japan – over *** r ths kg, in Canada – over *** ths kg, in USA – over *** ths kg. That is why, despite a significant growth, Russian milk cattle breeding is behind the developed countries to a great extent.

CHAPTER 6

VOLUME OF THE RUSSIAN
MARKET OF MILK AND CREAM

In 2012 per capita consumption of drinking milk in Russia amounted to *** litres per person (36,8*** kg). It was *** litres more than in the previous year. For comparison: consumption of milk drinks in Russia according to the Federal State Statistics Service in 2011 amounted to *** litres per person and milk yield in 2011 in RF amounted to *** litres per person. Thus, the share of drinking milk in the structure of milk products consumption amounts to ***%.



Russian market of cream in 2009-2012 increased steadily. In 2010 the rate of growth amounted to ***%. The market volume reached *** ths tons. In 2011 the market of cream increased by***%, in 2012– by ***%. In 2012 volume of the Russian market reached *** ths tons.

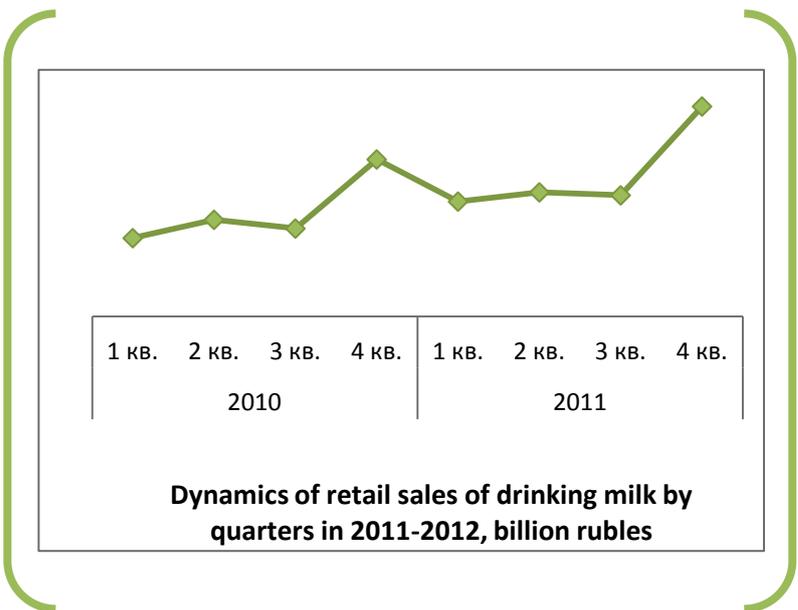
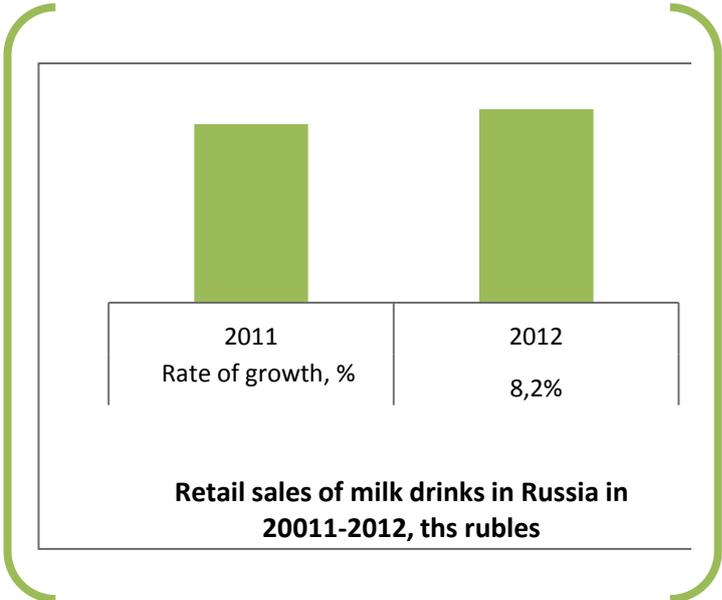
CHAPTER 8

ANALYSIS OF RETAIL SALES OF DRINKING MILK IN RUSSIA

In 2012 volume of retail sales of milk and milk drinks in cost terms increased by **%. Volume of sales amounted to *** billion rubles.

The largest federal district by retail sales turnover is Central FD where in 2012 sales volume amounted to *** billion rubles. *** FD ranked second by milk consumption (**billion rubles), Siberian FD - third (**billion rubles).

The least amount of retail sales of milk turnover among federal districts of RF was marked in North Caucasian FD, which in 2012 sold products for almost *** billion rubles. Such a low parameter was due to the fact that **.



In 2012 volume of retail sales of condensed and powdered milk in cost terms increased by **%, and reached *** billion rubles.

CHAPTER 11

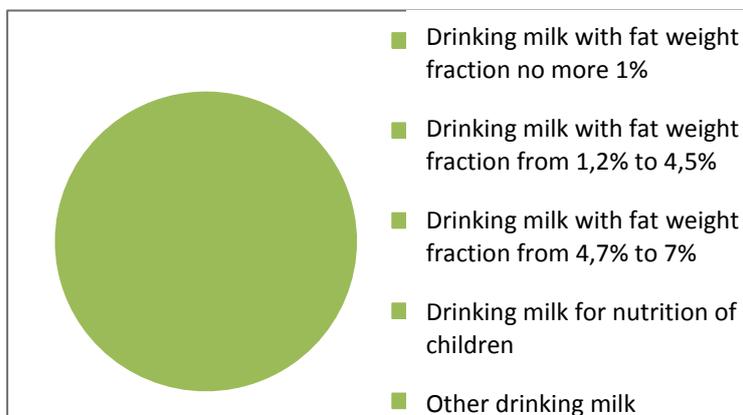
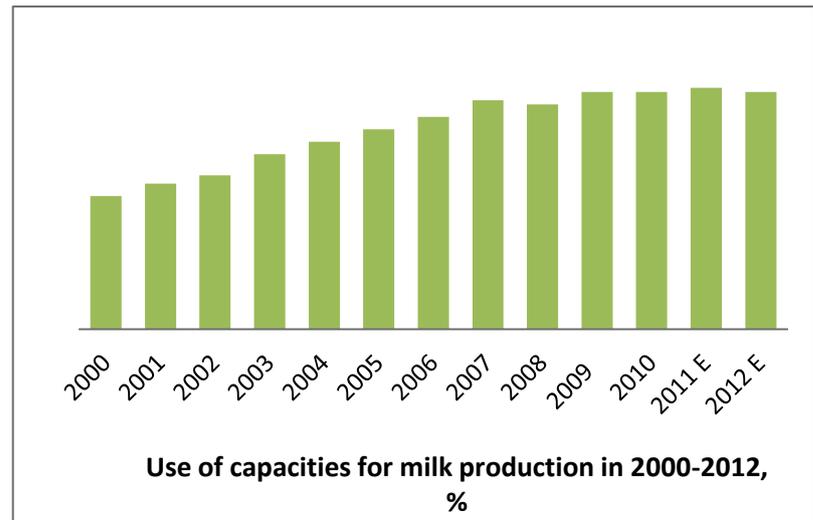
RUSSIAN PRODUCTION OF MILK AND CREAM

In 2010 volume of drinking milk production amounted to *** ths tons that was ****% more, than in 2009. Such an increase of these goods production occurred despite of the ****% decrease of milk yield in 2010.

In 2011 the rate of growth slowed down to ****%. In 2012 *** ths tons were produced that ****% exceeded the same parameter of 2011.

The share of ten largest regions by volumes of

drinking milk production in 2012 had ****% of total production. The share of Krasnodar Territory was equal to ****%, Krasnoyarsk Territory – ****%, Sverdlovsk Region – ****%. The share of Moscow amounted to ****%.



The maximal parameter of whole-milk products production during 2009-2012 was marked in May 2012 – *** ths tons. In December 2012 *** ths tons of goods of this segment were produced that was ****% more than during the same period of 2011.

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Number of population of Russia in 1990, 2000, 2005 and 2008-2012, ths people

Schedule 2. Dynamics of resident population number of Russia in three forecast variants in 2011-2031, ths people

Diagram 1. Structure of the population of Russia in ratio to the working age in RF-2031, % (average variant of the forecast)

Table 1. Number of population of the largest cities of Russia according to the Census of 2002 and 2010 and January 1, 2013, ths people

Schedule 3. Dynamics of actual household disposable income in Russia and annual rate of its growth in 2000-2012, %

Schedule 4. Forecast of the ratio of demographic load dynamics in 2011-2033

Diagram 2. Dynamics of the number of the employed and the unemployed in 2000-2012 and forecast for 2013-2015, mln people

Schedule 5. Dynamics of number of employed and unemployed people in economically active population by federal districts of RF in 2006-2012, %

Schedule 6. Dynamics of GDP of RF in prices of 2008 in 2002-2012 and forecast for 2013-2015, billion rubles

Schedule 7. Investments into the fixed capital of RF in 2002-2012 and forecast for 2013-2015, billion rubles

Schedule 8. Surplus/deficit of consolidated budget of RF in 2006-2010, % to GDP

Schedule 9. Dynamics of total external debt of RF in 2009-2013 (as of 1 January), mln dollars

Diagram 3. Change of structure of the external debt of RF in 2009-2013 (as of January 1), %

Schedule 10. Dynamics of CPI in 2006-2012 and forecast for 2013-2015, % to the corresponding period of the previous year

Schedule 11. Dynamics of the population of Russia and world in 2000-2012 and forecast up to 2100, mln people.

Schedule 12. Share of RF in the world GDP in 2001-2012 and forecast for 2013-2016, %

2. SUBJECT OF RESEARCH

3. WORLD MARKET OF MILK AND CREAM

Schedule 13. Dynamics of the world production of cow milk in 2007-2011, tons

Schedule 14. The largest producers of cow milk in 2011, mln tons

Table 2. Production of cow milk by countries of the world in 2007-2011, tons

Diagram 4. Structure of the world milk production in 2011, %

Схема 1. Производство коровьего молока в мире в 2011 г., тонн

Diagram 5. Structure of the world production of cow milk by countries in 2011, %

Diagram 6. Change of structure of the world production of cow milk by countries in 2007-2011, %

Table 3. Import volumes of cow milk by countries of the world in 2007-2010, tons

Diagram 7. Structure of the world import of cow milk by countries in 2010, %

Diagram 8. Change of structure of the world import of cow milk by countries in 2007-2010, %

Schedule 15. Dynamics of world export of cow milk in 2007-2010, tons

Table 4. Export volumes of cow milk by countries of the world in 2007-2010, tons

Diagram 9. Structure of world export of cow milk by countries in 2010, %

Diagram 10. Change of structure of world export of cow milk by countries in 2007-2010, %

Table 5. Export of powdered milk

Schedule 16. Producer prices for cow milk by countries of the world in 2010, dollars/ton

4. CATTLE LIVESTOCK IN RUSSIA

Schedule 17. Cattle stock in RF in 2006-2012, ths animal units

Diagram 11. Structure of cattle livestock by purpose in federal districts of RF in physical terms in 2012, %

Table 6. The share of dairy herb in the structure of cattle stock in regions of RF in physical terms in 2012, %

Schedule 18. Dynamics of cows stock in RF in 2006-2012, ths animal units

Table 7. Dairy herb stock in federal districts of RF in 2006-2012, ths animal units

Schedule 19. Dairy herb stock in federal districts of RF in 2011-2012, ths animal units

Diagram 12. Structure of cows distribution by federal districts of RF in 2012, %

Table 8. Dairy herb stock in regions of RF in 2011-2012, ths animal units

Schedule 20. Dairy herb stock in the largest regions of RF in 2011-2012, ths animal units

Diagram 13. Regional structure of dairy herb of Russia in physical terms in 2012, %

Diagram 14. Regional structure of dairy herb of Russia in physical terms in 2011-2012, %

5. YIELD OF MILK IN RUSSIA

Schedule 21. Yield of milk per cow in Russia in 1990-2012*

Schedule 22. Yield of milk per cow by kinds of farms in Russia v 1990-2012*, kg/year

Table 9. Productivity of cows in regions of RF in 2010-2011, kg/year

Schedule 23. Russian production of raw milk in 2007-2012*, ths tons

Diagram 15. Structure of the Russian production of raw milk by kinds of farms in physical terms in 2007-2012*, %

Table 10. Russian production of raw milk by kinds of farms in 2007-2011, ths tons

Table 11. Russian production of raw milk by federal districts in 2007-2011, ths tons

Diagram 16. Structure of the Russian production of raw milk by federal districts in 2012*, %

Diagram 17. Change of structure of Russian raw milk production by federal districts in 2009-2012*, %

Table 12. Russian production of raw milk by regions in 2007-2011, ths tons

Diagram 18. Regional structure of the Russian production of raw milk in 2012*, %

Diagram 19. Change of regional structure of Russian raw milk production in 2007-2012*, %

6. VOLUME OF THE RUSSIAN MARKET OF MILK AND CREAM

Schedule 24. Dynamics of the volume of the Russian market of drinking milk in 2009-2012, tons

Diagram 20. Import content on the Russian market of drinking milk in physical terms in 2009-2012, %

Schedule 25. Per capita consumption of drinking milk in Russia in 2009-2012, litre/person

Schedule 26. Dynamics of the volume of the Russian market of cream in 2009-2012, tons

Diagram 21. Import content on the Russian market of cream in physical terms in 2009-2012, %

Schedule 27. Per capita consumption of cream in Russia in 2009-2012, kg/person

Schedule 28. Volume of the Russian market of powdered milk and cream in 2009-2012, tons

Diagram 22. Import content on the Russian market of powdered milk and cream in physical terms in 2009-2012, %

Schedule 29. Per capita consumption of powdered milk and cream in Russia in 2009-2012, kg/person

Schedule 30. Volume of the Russian market of condensed milk and cream in 2009-2012, tons

Diagram 23. Import content on the Russian market of condensed milk and cream in physical terms in 2009-2012, %

Schedule 31. Per capita consumption of condensed milk and cream in Russia in 2009-2012, kg/person

7. CONSUMPTION OF MILK AND MILK PRODUCTS IN RUSSIA

Schedule 32. Dynamics of milk and milk products consumption in physical terms in Russia in 2007-2012*, ths tons

Diagram 24. Consumption structure of milk and milk products in physical terms by federal districts of RF, %

Diagram 25. Change of structure of milk and milk products consumption in physical terms by federal districts of RF in 2007-2011, %

Table 13. Consumption of milk and milk products in physical terms in Russia in 2007-2011, ths tons

Schedule 33. The largest regions of milk and milk products consumption in Russia in 2009-2011, ths tons

Schedule 34. Regions of RF with the lowest consumption of milk and milk products in 2009-2011, ths tons

Diagram 26. Consumption structure of milk and milk products in physical terms by regions of RF, %

Diagram 27. Change of structure of milk and milk products consumption in physical terms by regions of RF in 2007-2011, %

Table 14. Consumption of milk and milk products by regions of RF in physical terms in 2007-2011, ths tons

Schedule 35. Per capita consumption of milk and milk products in Russia in physical terms in 2007-2011, kg/person

Table 15. Per capita consumption of milk and milk products by regions of RF in physical terms in 2007-2011, kg/person

8. ANALYSIS OF RETAIL SALES IN RUSSIA

Schedule 36. Retail sales of drinking milk in Russia in 2009-2012, ths rubles

Schedule 37. Dynamics of retail sales of drinking milk by quarters in 2011-2012, billion rubles.

Table 16. Retail sales of drinking milk in federal districts of RF in 2011-2012, ths rubles.

Schedule 38. Retail sales of drinking milk in federal districts of RF in 2011-2012, ths rubles

Diagram 28. Structure of retail sales of drinking milk by federal districts of RF in 2012 in cost terms, %

Table 17. Retail sales of drinking milk in regions of RF in 2011-2012, ths rubles

Diagram 29. Regional structure of retail sales of drinking milk in 2012 in cost terms, %

Schedule 39. Retail sales of milk drinks in Russia in 2011-2012, billion rubles

Schedule 40. Dynamics of retail sales of milk drinks by quarters in 2011-2012, billion rubles

Table 18. Volume of retail sales of milk drinks in federal districts of RF in RF- 2012, ths rubles

Schedule 41. Retail sales of milk drinks in federal districts of RF in RF- 2012, ths rubles

Diagram 30. Structure of retail sales of milk drinks by federal districts of RF in cost terms in 2012, %

Diagram 31. Change of structure of retail sales of milk drinks by federal districts of RF in cost terms in 2011-2012, %

Table 19. Volume of retail sales of milk drinks in regions of RF in 2011-2012, ths rubles

Schedule 42. The largest regions of RF by volumes of retail sales of milk drinks in 2012, billion rubles

Diagram 32. Regional structure of retail sales of milk drinks in 2012 in cost terms, %

Schedule 43. Retail sales of powdered and condensed milk in Russia in 2009-2012, billion rubles

Schedule 44. Dynamics of retail sales of powdered and condensed milk by quarters in 2009-2012, billion rubles

Table 20. Retail sales of powdered and condensed milk in federal districts of RF in 2009-2012, ths rubles

Schedule 45. Retail sales of powdered and condensed milk in federal districts of RF in 2011-2012, ths rubles

Diagram 33. Structure of retail sales of powdered and condensed milk by federal districts of RF in 2012 in cost terms, %

Table 21. Retail sales of powdered and condensed milk in regions of RF in 2009- 2012, ths rubles

Diagram 34. Regional structure of retail sales of powdered and condensed milk in 2012 in cost terms, %

9. STATE REGULATIONS OF THE MARKET OF MILK

10. TRENDS ON THE RUSSIAN MARKET OF MILK PRODUCTS

11. RUSSIAN PRODUCTION OF MILK AND CREAM

Schedule 46. Use of capacities for milk production in 2000-2012, %

Schedule 47. Commissioning of capacities for milk production in RF in 2000-2012, tons/shift

Diagram 35. Structure of the Russian production of drinking milk by types in 2012*, %

Schedule 48. Dynamics of Russian production volumes of drinking milk in 2009-2012, tons

Schedule 49. Dynamics of Russian production volumes of drinking milk by months in 2009-2012, tons

Table 22. Volumes of the Russian production of drinking milk by months in 2009-2012, tons

Table 23. Volumes of the Russian production of drinking milk by federal districts in 2009-2012, tons

Diagram 36. Structure of the Russian production of drinking milk by federal districts in 2012, %

Diagram 37. Change of structure of the Russian production of drinking milk by federal districts in 2009-2012, %

Table 24. Volumes of the Russian production of drinking milk by regions in 2009- 2012, tons

Diagram 38. Regional structure of the Russian production of drinking milk in 2012, %

Diagram 39. Change of regional structure of the Russian production of drinking milk in 2009-2012, %

Schedule 50. Dynamics of Russian production volumes of liquid and paste-like milk products for early age children in 2009-2012, tons

Schedule 51. Dynamics of Russian production volumes of liquid and paste-like milk products for early age children by months in 2009-2012, tons

Table 25. Volumes of the Russian production of liquid and paste-like milk products for early age children by months in 2009-2012, tons

Table 26. Volumes of the Russian production of liquid and paste-like milk products for early age children by federal districts in 2009-2012, tons

Diagram 40. Structure of the Russian production of liquid and paste-like milk products for early age children by federal districts in 2012, %

Diagram 41. Change of structure of the Russian production of liquid and paste-like milk products for early age children by federal districts in 2009-2012, %

Table 27. Volumes of the Russian production of liquid and paste-like milk products for early age children by regions in 2009-2012, tons

Diagram 42. Regional structure of the Russian production of liquid and paste-like milk products for early age children in 2012, %

Diagram 43. Change of regional structure of the Russian production of liquid and paste-like milk products for early age children in 2009-2012, %

Schedule 52. Dynamics of Russian production volumes of whole-milk products (in milk equivalent) in 2007-2012, tons

Schedule 53. Dynamics of Russian production volumes of whole-milk products (in milk equivalent) by months in 2007-2012, tons

Table 28. Volumes of the Russian production of whole-milk products (in milk equivalent) by months in 2007-2012, tons

Table 29. Volumes of the Russian production of whole-milk products (in milk equivalent) by federal districts in 2007-2012, tons

Diagram 44. Structure of the Russian production of whole-milk products (in milk equivalent) by federal districts in 2012, %

Diagram 45. Change of structure of the Russian production of whole-milk products (in milk equivalent) by federal districts in 2007-2012, %

Table 30. Volumes of the Russian production of whole-milk products (in milk equivalent) by regions in 2007-2012, tons

Diagram 46. Regional structure of the Russian production of whole-milk products (in milk equivalent) in 2012, %

Diagram 47. Change of regional structure of the Russian production of whole-milk products (in milk equivalent) in 2007-2012, %

Schedule 54. Dynamics of Russian production volumes of drinking milk for early age children in 2009-2012, tons

Schedule 55. Dynamics of Russian production volumes of drinking milk for early age children by months in 2009-2012, tons

Table 31. Volumes of the Russian production of drinking milk for early age children by months in 2009-2012, tons

Table 32. Volumes of the Russian production of drinking milk for early age children by federal districts in 2009-2012, tons

Diagram 48. Structure of the Russian production of drinking milk for early age children by federal districts in 2012, %

Diagram 49. Change of structure of the Russian production of drinking milk for early age children by federal districts in 2009-2012, %

Table 33. Volumes of the Russian production of drinking milk for early age children by regions in 2009-2012, tons

Diagram 50. Regional structure of the Russian production of drinking milk for early age children in 2012, %

Diagram 51. Change of regional structure of the Russian production of drinking milk for early age children in 2009-2012, %

Diagram 52. Structure of the Russian production of cream by types in 2012*, %

Schedule 56. Dynamics of Russian production volumes of cream in 2009-2012, tons

Schedule 57. Dynamics of Russian production volumes of cream by months in 2009-2012, tons

Table 34. Volumes of the Russian production of cream by months in 2009-2012, tons

Table 35. Volumes of the Russian production of cream by federal districts in 2009-2012, tons

Diagram 53. Structure of the Russian production of cream by federal districts in 2012, %

Diagram 54. Change of structure of the Russian production of cream by federal districts in 2009-2012, %

Table 36. Volumes of the Russian production of cream by regions in 2009-2012, tons

Diagram 55. Regional structure of the Russian production of cream in 2012, %

Diagram 56. Change of regional structure of the Russian production of cream in 2009-2012, %

Diagram 57. Structure of the Russian production of powdered milk by types in 2012*, %

Schedule 58. Dynamics of Russian production volumes of powdered milk and cream in 2009-2012, tons

Schedule 59. Dynamics of Russian production volumes of powdered milk and cream by months in 2009-2012, tons

Table 37. Volumes of the Russian production of powdered milk and cream by months in 2009-2012, tons

Table 38. Volumes of the Russian production of powdered milk and cream by federal districts in 2009-2012, tons

Diagram 58. Structure of the Russian production of powdered milk and cream by federal districts in 2012, %

Diagram 59. Change of structure of the Russian production of powdered milk and cream by federal districts in 2009-2012, %

Table 39. Volumes of the Russian production of powdered milk and cream by regions in 2009-2012, tons

Diagram 60. Regional structure of the Russian production of powdered milk and cream in 2012, %

Diagram 61. Change of regional structure of the Russian production of powdered milk and cream in 2009-2012, %

Schedule 60. Dynamics of Russian production volumes of powdered baby milk mixtures, including sour-milk in 2007-2012, tons

Schedule 61. Dynamics of Russian production volumes of powdered baby milk mixtures, including sour-milk by months in 2007-2012, tons

Table 40. Volumes of the Russian production of powdered baby milk mixtures, including sour-milk by months in 2009-2012, tons

Table 41. Volumes of the Russian production of powdered baby milk mixtures, including sour-milk by federal districts and regions in 2009-2012, tons

Diagram 62. Structure of the Russian production of condensed milk products by types in 2012,%

Schedule 62. Dynamics of Russian production volumes of condensed milk products in 2007-2012, tons

Schedule 63. Dynamics of Russian production volumes of condensed milk products by months in 2007-2012, tons

Table 42. Volumes of the Russian production of condensed milk products by months in 2007-2012, tons

Table 43. Volumes of the Russian production of condensed milk products by federal districts in 2007-2012, tons

Diagram 63. Structure of the Russian production of condensed milk products by federal districts in 2012, %

Diagram 64. Change of structure of the Russian production of condensed milk products by federal districts in 2007-2012, %

Table 44. Volumes of the Russian production of condensed milk products by regions in 2007-2012, tons

Diagram 65. Regional structure of the Russian production of condensed milk products in 2012, %

Diagram 66. Change of regional structure of the Russian production of condensed milk products in 2007-2012, %

Schedule 64. Dynamics of Russian production volumes of condensed milk in 2009-2012, tons

Schedule 65. Dynamics of Russian production volumes of condensed milk by months in 2009-2012, tons

Table 45. Volumes of the Russian production of condensed milk by months in 2009-2012, tons

Table 46. Volumes of the Russian production of condensed milk by federal districts in 2009-2012, tons

Diagram 67. Structure of the Russian production of condensed milk by federal districts in 2012, %

Diagram 68. Change of structure of the Russian production of condensed milk by federal districts in 2009-2012, %

Table 47. Volumes of the Russian production of condensed milk by regions in 2009-2012, tons

Diagram 69. Regional structure of the Russian production of condensed milk in 2012, %

Diagram 70. Change of regional structure of the Russian production of condensed milk in 2009-2012, %

Schedule 66. Dynamics of Russian production volumes of condensed milk products with food products and additives in 2009-2012, tons

Schedule 67. Dynamics of Russian production volumes of condensed milk products with food products and additives by months in 2009-2012, tons

Table 48. Volumes of the Russian production of condensed milk products with food products and additives by months in 2009-2012, tons

Table 49. Volumes of the Russian production of condensed milk products with food products and additives by federal districts in 2009-2012, tons

Diagram 71. Structure of the Russian production of condensed milk products with food products and additives by federal districts in 2012, %

Diagram 72. Change of structure of the Russian production of condensed milk products with food products and additives by federal districts in 2009-2012, %

Table 50. Volumes of the Russian production of condensed milk products with food products and additives by regions in 2009-2012, tons

Diagram 73. Regional structure of the Russian production of condensed milk products with food products and additives in 2012, %

Diagram 74. Change of regional structure of the Russian production of condensed milk products with food products and additives in 2009-2012, %

Schedule 68. Dynamics of Russian production volumes of condensed cream in 2009-2012, tons

Schedule 69. Dynamics of Russian production volumes of condensed cream by months in 2009-2012, tons

Table 51. Volumes of the Russian production of condensed cream by months in 2009-2012, tons

Table 52. Volumes of the Russian production of condensed cream by federal districts and regions in 2009-2012, tons

12. THE LARGEST RUSSIAN PRODUCERS OF MILK AND CREAM

Table 53. Drinking milk production on the largest Russian enterprises in 2006-2009, tons

Diagram 75. Shares of the largest enterprises in the structure of all-Russian production of drinking milk in 2009, %

Table 54. Cream production on the largest Russian enterprises in 2006-2009, tons

Diagram 76. Shares of the largest enterprises in the structure of all-Russian production of cream in 2009, %

Table 55. Production of powdered milk and cream on the largest Russian enterprises in 2006-2009, tons

Diagram 77. Shares of the largest enterprises in the structure of all-Russian production of powdered milk and cream in 2009, %

Table 56. Condensed milk production and cream on the largest Russian enterprises in 2006-2009, tons

Diagram 78. Shares of the largest enterprises in the structure of all-Russian production of condensed milk and cream in 2009, %

Table 57. Volumes of the revenues of the largest companies by production of processed liquid milk in RF in 2011, ths rubles

Diagram 79. Structure enterprises distribution by production of processed liquid milk by federal districts of RF in February 2013, %

Table 58. Volumes of the revenues of the largest companies by production of solid forms of cream, milk and other milk products in RF in 2011, ths rubles

Table 59. Volumes of the revenues of the largest companies by production of condensed milk products in RF in 2011, ths rubles

13. THE LARGEST PLAYERS ON THE MARKET OF MILK AND CREAM

Scheme 2. Production geography of «Vimm-Bill-Dann» company

Table 60. Range of products of milk and sour-milk products VBD

Table 61. Range of products of «Danone-unimilk» company

Table 62. Range of products of «Ehrmann»

Table 63. Range of products of «Campina» company

14. DISTRIBUTION CHANNELS ON THE RUSSIAN MARKET OF MILK PRODUCTS

Scheme 3. Wholesale distribution channels

Schedule 70. The most popular categories of products bought online, % of the orders at home

15. ANALYSIS OF THE RUSSIAN EXPORT OF MILK AND CREAM

Schedule 71. Dynamics of drinking milk and cream export in 2007-2012, tons

Schedule 72. Dynamics of drinking milk and cream export in 2007-2012, ths dollars

Schedule 73. Dynamics of drinking milk and cream export by months in 2007-2012, tons

Table 64. Volumes of drinking milk and cream export by months in 2007-2012, tons

Schedule 74. Dynamics of powdered and condensed milk and cream export in 2007-2012, tons/th\$ dollars.

Table 65. Volumes of drinking milk and cream export by months in 2007-2012, th\$ dollars.

Table 66. Volumes of drinking milk and cream export by countries of destination in 2007-2012, tons

Table 67. Volumes of drinking milk and cream export by countries of destination in 2007-2012, th\$ dollars

Diagram 80. Export structure of drinking milk and cream in physical terms in 2012, %

Diagram 81. Change of structure of drinking milk and cream export in physical terms in 2010-2012, %

Diagram 82. Export structure of drinking milk and cream in cost terms in 2012, %

Diagram 83. Change of structure of drinking milk and cream export in cost terms in 2010-2012, %

Schedule 74. Dynamics of powdered and condensed milk and cream export in 2007-2012, tons/th\$ dollars

Schedule 75. Dynamics of powdered and condensed milk and cream export in 2007-2012, th\$ dollars

Schedule 76. Dynamics of powdered and condensed milk and cream export by months in 2007-2012, tons

Table 68. Volumes of powdered and condensed milk and cream export by months in 2007-2012, tons

Schedule 77. Dynamics of powdered and condensed milk and cream export by months in 2007-2012, th\$ dollars

Table 69. Volumes of powdered and condensed milk and cream export by months in 2007-2012, th\$ dollars

Table 70. Volumes of powdered and condensed milk and cream export by countries of destination in 2007-2012, tons

Table 71. Volumes of powdered and condensed milk and cream export by countries of destination in 2007-2012, th\$ dollars

Diagram 84. Export structure of powdered and condensed milk and cream in physical terms in 2012, %

Diagram 85. Change of structure of powdered and condensed milk and cream export in physical terms in 2010-2012, %

Diagram 86. Export structure of powdered and condensed milk and cream in cost terms in 2012, %

Diagram 87. Change of structure of powdered and condensed milk and cream export in cost terms in 2010-2012, %

16. ANALYSIS OF THE RUSSIAN IMPORT OF MILK AND CREAM

- Schedule 79. Dynamics of drinking milk and cream import in 2007-2012, ths dollars
- Schedule 80. Dynamics of drinking milk and cream import by months in 2007-2012, tons
- Table 72. Volumes of drinking milk and cream import by months in 2007-2012, tons
- Schedule 81. Dynamics of drinking milk and cream import by months in 2007-2012, ths dollars
- Table 73. Volumes of drinking milk and cream import by months in 2007-2012, ths dollars
- Diagram 88. Structure of the Russian drinking milk and cream import by types in 2012, %
- Table 74. Volumes of drinking milk and cream import by countries of origin in 2007-2012, tons
- Table 75. Volumes of drinking milk and cream import by countries of origin in 2007- 2012, ths dollars
- Diagram 89. Import structure of drinking milk and cream in physical terms in 2012, %
- Diagram 90. Change of structure of drinking milk and cream import in physical terms in 2007-2012, %
- Diagram 91. Import structure of drinking milk and cream in cost terms in 2012, %
- Schedule 82. Dynamics of powdered and condensed milk and cream import in 2007-2012, tons
- Schedule 83. Dynamics of powdered and condensed milk and cream import in 2007-2012, ths dollars
- Schedule 84. Dynamics of powdered and condensed milk and cream import by months in 2007-2012, tons
- Table 76. Volumes of powdered and condensed milk and cream import by months in 2007-2012, tons
- Schedule 85. Dynamics of powdered and condensed milk and cream import by months in 2007-2012, ths dollars
- Table 77. Volumes of powdered and condensed milk and cream import by months in 2007-2012, ths dollars.
- Table 78. Volumes of powdered and condensed milk and cream import by countries of origin in 2007-2012, tons
- Table 79. Volumes of powdered and condensed milk and cream import by countries of origin in 2007-2012, ths dollars
- Diagram 93. Import structure of powdered and condensed milk and cream in physical terms in 2012, %
- Diagram 94. Change of structure of powdered and condensed milk and cream import in physical terms in 2007-2012, %
- Diagram 95. Import structure of powdered and condensed milk and cream in cost terms in 2012, %
- Diagram 96. Change of structure of powdered and condensed milk and cream import in cost terms in 2007-2012, %

17. PRODUCER PRICES FOR MILK AND CREAM IN RUSSIA

Schedule 86. Average producer prices for milk in Russia in 2010 - January 2013, rubles/ton

Schedule 87. Comparison of average producer prices for milk in Russia in 2010 i 2012, the rubles/ton

Table 80. Average producer prices for milk in Russia in 2010 - January 2013, rubles/ton

Schedule 88. Average producer prices for liquid and paste-like milk products for early age children in Russia in 2010-2013, rubles/ton

Schedule 89. Dynamics average producer prices for liquid and paste-like milk products for early age children by months in Russia in 2010 - January 2013, rubles/ton

Table 81. Average producer prices for liquid and paste-like milk products for early age children in Russia in 2010 – January 2013, rubles/ton

Schedule 90. Average producer prices for cream in Russia in 2010-2013, rubles/ton

Schedule 91. Dynamics average producer prices for cream by months in Russia in 2010 - January 2013, rubles/ton

Table 82. Average producer prices for cream in Russia in 2010 - January 2013, rubles/ton

Schedule 92. Average producer prices for powdered milk with fatness over 1,5% in Russia in 2010-2013, rubles/ton

Schedule 93. Dynamics average producer prices for powdered milk with fatness over 1,5% by months in Russia in 2010 - January 2013, rubles/ton

Table 83. Average producer prices for powdered milk with fatness over 1,5% in Russia in 2010 – January 2013, rubles/ton

Schedule 94. Average producer prices for powdered milk with fatness less 1,5% in Russia in 2010-2013, rubles/ton

Schedule 95. Dynamics average producer prices for powdered milk with fatness less 1,5% by months in Russia in 2010 - January 2013, rubles/ton

Table 84. Average producer prices for powdered milk with fatness less 1,5% in Russia in 2010-January 2013, rubles/ton

Schedule 96. Average producer prices for powdered baby milk mixtures for early age children in Russia in 2010-2013, rubles/ton

Schedule 97. Dynamics average producer prices for powdered baby milk mixtures for early age children by months in Russia in 2010 - January 2013, rubles/ton

Table 85. Average producer prices for powdered milk mixes for early age children in Russia in 2010 – January 2013, rubles/ton

Schedule 98. Average producer prices for condensed milk products in Russia in 2010-2013, rubles/ton

Schedule 99. Dynamics average producer prices for condensed milk products by months in Russia in 2010 - January 2013, rubles/ton

Table 86. Average producer prices for condensed milk products in Russia in 2010-January 2013, rubles/ton

18. RETAIL PRICES FOR MILK AND CREAM IN RUSSIA

Schedule 100. Average retail prices for milk and milk drinks in 2009 – January 2013, rubles/litre

Schedule 101. Average retail prices for milk and milk drinks in 2009-2012, rubles/litre

Table 87. Average retail prices for milk and milk drinks in 2011-2012, rubles/litre

Schedule 102. Average retail prices for powdered whole milk in Russia in 2009-2012, rubles/kg

Schedule 103. Dynamics of average retail prices for powdered whole milk by months in Russia in 2009-2012, rubles/kg

Table 88. Average retail prices for powdered whole milk in Russia in 2009-2012, rubles/kg

Schedule 104. Average retail prices for powdered milk baby mixtures in Russia in 2007-2012, rubles/kg

Schedule 105. Dynamics of average retail prices for powdered milk baby mixtures by months in Russia in 2007-2012, rubles/kg

Table 89. Average retail prices for powdered baby milk in Russia in 2007-2012, rubles/kg

Schedule 106. Average retail prices for condensed milk with sugar in Russia in 2007-2012, rubles/400 g

Schedule 107. Dynamics of average retail prices for condensed milk with sugar by months in Russia in 2007-2012, rubles/400 g

Table 90. Average retail prices for condensed milk with sugar in Russia in 2007-2012, rubles/400 g

19. STRUCTURE OF RETAIL PRICE FOR MILK

Diagram 97. Structure of retail price for whole pasteurized milk in 2012*, %

20. CONSUMER PREFERENCES ON THE RUSSIAN MARKET OF MILK

Schedule 108. Dynamics of the share of household expenses for milk products in 2003-2012E, %

Diagram 98. Consumption structure of milk products in 2011

Diagram 99. Structure of milk products by types on the Russian market in 2012, %

Schedule 109. The most popular brands of milk products in 2012

Schedule 110. Change of the rating of favorite brands in 2010-2012

21. PROFILES OF THE LARGEST ENTERPRISES BY WHOLE MILK PRODUCTION

22. FORECAST OF THE RUSSIAN MARKET OF MILK AND CREAM DEVELOPMENT

FOR 2013-2016.

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