

RUSSIAN SAUSAGE MARKET

2011

Issue 2 – Sample Pages





1. EXECUTIVE SUMMARY

1.1. Background

This report was produced by **GLOBAL REACH CONSULTING (GRC)** and presents the results of market research conducted in August-September 2011.

The aim of this research is to provide a comprehensive overview of the Russian sausage market.

The report covers the following key products:

- Cooked and cooked-smoked sausage products, including stuffed ones;
- Smoked sausages;
- Sausage from heat treated ingredients;
- Blood sausage.

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1.2. Key Research Areas

Specifically, the research aims to cover:

- Domestic sausage production, including:
 - Production of all types of sausages;
 - Production of cooked and cooked-smoked sausage products, including stuffed ones;
 - Production of smoked sausages;
 - Production of sausage from heat treated ingredients;
 - Production of blood sausage;
- Competitor analysis, including:
 - Russian largest sausage producers;
 - Largest producers by major types of sausage products, including:
 - Cooked sausage made without poultry meat;
 - Cooked sausage made from poultry meat;
 - Semi-cooked sausage made without poultry meat;
 - Semi-cooked sausage made from poultry meat;
 - Hard-smoked sausage.
- Sausage imports:
 - Value and volume of imports;
 - Structure of imports by types of products;
 - Geographical distribution of imports;
 - Imports structure by importers;
- Sausage exports:
 - Value and volume of exports;
 - Structure of exports by types of products;
 - Geographical distribution of exports;
 - Exports structure by exporters.

- Sausage market balance:
 - Market Trends;
 - Market structure.

- Domestic retail sales of meat products and canned meat:
 - Sales volume;
 - Geographical distribution of retail sales.

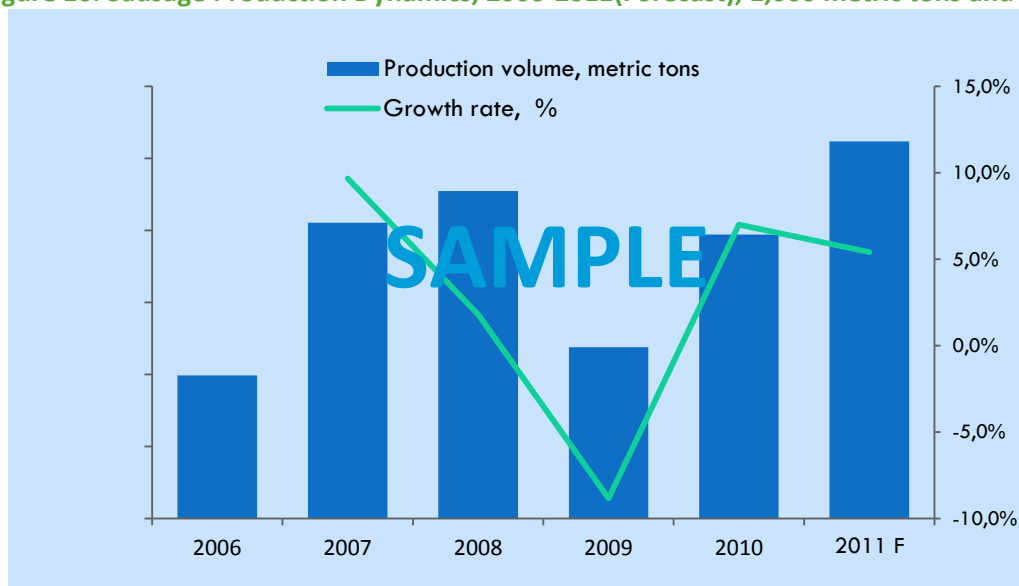
- Consumer preferences.

1.3. Management Summary

Domestic Sausage Production

- In 2010, the production of sausage products in the Russian Federation amounted to nearly *** million tons, 7% rise over the previous year.
- According to GLOBAL REACH CONSULTING forecasts for 2011, the production of sausage products is to increase by.

Figure 10. Sausage Production Dynamics, 2006-2011(Forecast), 1,000 metric tons and %



Source: ***

- In the first half of 2011 cheaper sausages - cooked and cooked-smoked sausages, including stuffed - still dominate in the Russian production structure.
- ***
- The Central Federal District is the largest sausage producer with a share of ***%. According to 2010 totals, the sausage production here reached *** thousand tons. During the first half of 2011 the production growth totaled ***% compared to the same period of 2010.
- In 2010, Moscow was ranked the 1st among Russian sausage producing regions with a share of ***%. In the first half of 2011 the production here grew by ***%, compared to the same period in 2010.

Sausage Imports

- In 2010 imports of sausage products totaled *** thousand metric tons. According to 2010 totals, the volume of imports dropped by ***%.
- The share of Frankfurt and Vienna sausages accounts for ***% of total sausage imports. The share of liver sausages and liver puree reaches ***% of Russian sausage imports.
- The United States of America is a leading supplier of sausage products to the Russian Federation with a share of ***% of imports in volume and ***% in value terms.

Table 21. Sausage Imports Dynamics by Country of Origin, Volume, 2009-6M 2011, Metric Tons

Country of Origin	2009	2010	6M 2011
U.S.	***	***	***
***	***	***	***
Poland	***	***	***
***	***	***	***
France	***	***	***
Italy	***	***	***
***	***	***	***
Spain	***	***	***
***	***	***	***
Slovenia	***	***	***
Finland	***	***	***
Austria	***	***	***
Serbia	***	***	***
Netherlands	***	***	***
***	***	***	***
***	***	***	***
Latvia	***	***	***
Lithuania	***	***	***
Total	***	***	***

Source: ***

- *** LTD is the largest sausage importer to the Russian market with a share of ***% in volume and ***% in value.
- In 2010 *** LTD was the largest producer of imported sausages with a share of ***% in volume and 34% in value.

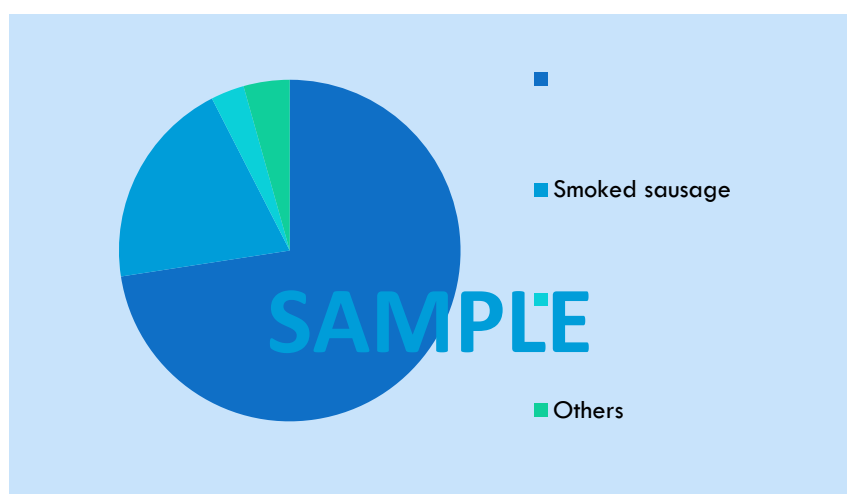
Sausage Exports

- In 2010 Russian sausage exports accounted for *** thousand tons, a ***% decline.
- The share of cooked and cooked-smoked sausages (except for Frankfurt and Vienna sausages) accounts for ***% of total sausage exports.
- In 2010 *** was the major destination country in the Russian sausage exports structure with a share of ***% in volume and ***% in value terms.
- *** is the largest producers of exported sausages with a share of ***% in volume and ***% in value terms.
- *** LTD is the leading sausage exporter with a share of ***% in volume and ***% in value terms.

Sausage Market Balance

- ***.
- According to **GLOBAL REACH CONSULTING** forecasts, in 2011 Russian sausage market might grow by ***% to *** million tons due to domestic production growth.
- ***
- In 2010 the share of cooked and cooked-smoked sausages in the Russian market accounted for ***, the share of smoked sausage is ***, the share of sausages made of heat treated ingredients figured up to ***, the share of other sausage products accounted for ***%.

Figure 48. Russian Sausage Market Structure by Type of Sausage, 2010, %



Source: ***

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