



## ***The 2006-2015 Outlook for the Ice Cream Market in Russia***

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## Summary

In 2010, demand for ice cream in Russia increased by 9%, compared to 2009, and amounted to 392 thousand tons. The surge in demand can be regarded as market recovery after unprofitable seasons of 2007-2009. In the previous years, due to the price hike for raw materials, manufacturers had to raise the price for products dramatically, which amid the economic crisis led to the decline in the sales volume.

In Russia 10 different kinds of ice cream are on sale. Ice cream cups account for the major share of the sales in volume terms (127 thousand tons) and sandwich account for the minor share (2 thousand tons).

The most expensive kind of ice cream in the Russian market is sandwich ice cream, the average price for which equals 303 rubles per kilogram. The cheapest kinds of ice cream are fruit ice (120.03 rubles per kg) and ice cream cups (128.7 rubles per kg). In 2010, the average price for 1 kilogram of ice cream amounted to 185.7 rubles.

In Russia 55.5% of the population consume ice cream. The average consumption level equals 4.8 kilograms per consumer unit annually. The average expenditures on ice cream amount to 887.3 rubles per consumer unit annually.

**The 2006-2015 Outlook for the Ice Cream Market in Russia** contains the essential data, necessary to comprehend the current market opportunities and conditions and to assess the future prospects, covering such points as:

- The overall assessment of the economic environment in Russia
- Volume of sales of ice cream
- Balance of demand for and supply of ice cream
- Number of the population and per capita consumption of ice cream
- Economic output, total export and import, the volume of merchandise in storage
- Cost price, import and export cost, retail price for ice cream
- Ratings of the industry in terms of economic output and sales revenue
- Financial and economic profiles of leading enterprises

This report includes information about the sales of 10 kinds of ice cream: ice cream cup, stick ice cream, ice cream waffle bar, ice cream container, ice cream corn, ice cream roll cake, fruit ice, ice cream bar, sandwich ice cream and other kinds of ice cream. In the report the prices, actual and cost sales volumes of all kinds of ice cream are presented

Particular emphasis in the report is put on the price brackets of the ice cream market, including the ice cream of premium, middle, and lower price categories.

The report presents data on the retail volume and the sales in the catering sector. Separate chapters of the report are focused on the description of ice cream sales in the catering and retail sectors.

**The report presents an account of top ice cream producers, including:**

Inmarko, Vologda Ice Cream, Talosto-3000, Naberezhnye Chelny Cold Storage Facility Chelny Holod, Laguna Koil, Belgorod Cold Storage Facility, Altaiholod, Fabrika Grez, Sam-Po, Cold Storage Facility №3, Petroholod, Sakhalin – H, Inmarko in Tula, Altervest the XXI century, RosFrost, Novosibirsk Cold Storage Facility, Novokuzneck Cold Storage Facility, Penzaholod, Cold Storage Facility, Lipeck Cold Storage Facility.

**The survey is based on the official statistics, obtained from:**

- Federal State Statistics Service of the Russian Federation
- Ministry of the Economic Development of the Russian Federation
- Ministry of Agriculture of the Russian Federation
- Federal Customs Service of the Russian Federation
- Federal Tax Service of the Russian Federation

**Apart from the official statistics, the survey also contains the results of the research done by **BusinesStat**:**

- Survey of consumers of dairy products in Russia
- Audit of dairy product retailing in Russia
- Survey of experts of the dairy product market

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## Classification of Ice Cream

Ice cream is a frozen sweet dessert. It is a beaten (aerated) frozen pasteurized mixture of milk, cream or fruit and berry products with sugar, stabilizers, and food flavouring.

Ice cream is the product of high biological and nutritional quality, it is tender and has delectable flavor. It is good for secretory and motor functions of the digestive organs, and is actively used to treat gastrorrhagia and for post-surgery care of the digestive tract.

Ice cream contains many products in the proportions according to the recipe. As the solids content of ice cream increases to 30-40%, small ice crystals appear while freezing.

All kinds of ice cream can be relatively classified into 2 groups: main and exclusive.

The main group includes ice cream kinds, produced on the milk base (milk, creamy, and full-cream ice) and ice cream, produced on sucrose syrup with fruit and berry, aromatic and other fillers (fruit and berry and aromatic).

Exclusive kinds of ice cream are produced in small amounts, there are about 50 items in assortment. Some distinctive kinds of this group are being produced:

- Citrus ice cream is an ice cream kind of higher biological quality (with the white of hen eggs and natural citrus extract)
- Honey ice cream is an ice cream kind, containing natural honey
- Penguin is a chocolate covered kind of ice cream on fruit and berry base

There is also purpose-made ice cream, called Bodrost, which is enriched with oxygen.

Manufacturing technique of ice cream is a two-step process: mixture preparation and making ice cream out of this mixture. The whole process consists of the following steps: receiving raw materials, quality control of the raw materials, raw material preparation stage, mixture preparation, pasteurization of the mixture, filtering, homogenization (excluding fruit and berry and aromatic mixtures), cooling and maturation of mixture, freezing of mixture in the ice-cream apparatus, packaging, hardening and storage of ice cream.

The main food raw materials, used in the ice cream production are: cow milk (unskimmed, skim, desiccated or reconstituted), cream, butter, canned milk. Such sweeteners as beet sugar, honey, treacle, fruit sugar, and others are also used in the process of ice cream production. Sugar makes ice cream not only sweet, but also tender, it makes the point of congelation of ice cream lower. The recipes of ice cream may also contain egg products (fresh chicken eggs, frozen egg products, and egg powder).

In the ice cream production such food flavorings as nuts, tee, coffee, cocoa solids, cocoa butter, aromatic oils, fruit and berry essences, vanilla, vanillin, are used. Organic acids (tartaric, citric, malic, and lactic) are added in the process of production of fruit and berry and aromatic ice cream.

Stabilizers (jelling agents) are very important in the ice cream production. In this process such stabilizers as gelatin, agar, agaroid, and sodium alginate, rarer – pectin, edible starch, sodium casein ate, wheat flour, are used. Stabilizers make ice cream smooth, small crystals appear in the texture of the product while freezing, which makes ice cream resistant to melting.

Fruit and berry raw materials improve the flavor properties and nutritional qualities of ice cream greatly (apricots, plums, cranberry, black current, apples, etc).

Ice cream texture and consistency are mostly evaluated by ice cream overrun. Ice cream overrun is estimated using the weight or volume methods and is stated in percentage term. Overrun of high-quality cream ice and ice milk should be equal to 75%, of full cream ice to 100%, of fruit and berry and aromatic

ice cream to 40%. If overrun is insufficient, ice cream consistency is hard and the texture is rough. While freezing almost 50% of water turns into ice.

As only 50 % of water ices up during the freezing process, the method of hardening is used. During hardening 90% of water turns into ice. The process of hardening is done in special fast freezers or in the hardening cabinets, where the temperature is from -25 to -36 °C. If hardening is fast, water in ice cream turns into small crystals, which make the consistency and texture of ice cream better.

Ice cream is packed in nonreturnable consumption packages and in transport package. Large package (for mass nutrition) refers to metal cases (tins), weighting 10 kilograms. Small packages include ice cream cones, wafer rolls, ice cream cornets, ice cream bars without covering, chocolate-coated waffle bars, chocolate, ice cream cakes and rolls. Packing must have low water, gas and aroma permeability, and its properties must not change at the temperature to – 40 °C.

The procedure of quality examination of ice cream is held in accordance with all-Union-State-Standard and technical conditions by the following organoleptic indicators:

- Flavor and aroma should be fresh and typical for this kind of ice cream with the hint of fillers
- Consistency should be tender, homogeneous, without ice crystals, lumps of fat and stabilizers
- Colour should be flat, typical for this kind of ice cream

## Consumption of Ice Cream

In the current chapter the market is analyzed in terms of consumption patterns. It concerns all the consumers, including foreigners living in Russia, as they can also turn out to be consumers of ice cream.

In the chapter the indices of the market consumption are calculated, i.e. the consumption volume of ice cream, bought retail, but not cooked at home.

In order to gather data about consumption of ice cream, BusinesStat carries out annual surveys of dairy products consumers with the sample of 1,800 respondents.

It should be noted that BusinesStat distinguishes between purchasers and consumers of ice cream. According to the classification by BusinesStat, a purchaser is not only the person who buys the product, but also any other person who uses the purchased products.

## Number of Consumers

**Table 61. Number of consumers of ice cream, Russia, 2006-2010 (million people)**

	2006	2007	2008	2009	2010
Number of consumers (million people)	80.2	80.7	81.4	81.1	80.6
Dynamics (% of the previous year)	2.6	0.5	0.9	-0.4	-0.6

Source: *BusinesStat, Standardized Survey of Consumers of Dairy Products, All-Russian regular survey, sample of 1,800 respondents.*

**Table 62. Forecast of the number of consumers of ice cream, Russia, 2011-2015 (million people)**

	2011	2012	2013	2014	2015
Number of consumers (million people)	80.3	80.7	81.1	81.2	81.3
Dynamics (% of the previous year)	-0.3	0.4	0.5	0.2	0.1

Source: *BusinesStat, Standardized Survey of Consumers of Dairy Products, All-Russian regular survey, sample of 1,800 respondents.*

## Number of Consumers in Relation to the Size of Population

**Table 63. Number of consumers in relation to the size of population, Russia, 2006-2010 (%)**

	2006	2007	2008	2009	2010
Population of Russia, including foreigners (million people)	146.1	145.9	145.7	145.3	145.2
Number of consumers of ice cream (million people)	80.2	80.7	81.4	81.1	80.6
Share of the consumers in the population (%)	54.9	55.3	55.9	55.8	55.5

Source: Federal State Statistics Service, *BusinessStat*

**Table 64. Forecast of the number of consumers in relation to the size of population, Russia, 2011-2015 (%)**

	2011	2012	2013	2014	2015
Population of Russia, including foreigners (million people)	145.3	145.3	145.3	145.3	145.3
Number of consumers of ... (million people)	79.5	81.2	82.5	83.9	85.0
Share of the consumers in the population (%)	54.7	55.9	56.8	57.7	58.5

Source: Federal State Statistics Service, *BusinessStat*

Share of the ice cream consumers (people, who consume ice cream not rarer than once in half a year) in Russia equaled 55. 5% of the population size of the country, i.e. 80. 6 million people.

## Level of Consumption and Average Customer Expenditures

The consumption level of ice cream in Russia is much lower than in European countries. For example, an average American consumes 11 kilograms of ice cream per year, an average European – 6-8 kilograms. In Russia this figure equals 2.5 kilograms per year.

The consumption level of ice cream in Russia is affected by 3 factors:

- Russia is a northern country, where the winter season in most of the regions is very long. The consumption level of ice cream in winter rapidly decreases. In summer the consumption level of ice cream rises, people began to consume it outdoors.
- Low level of development of the HoReCa sector, absence of the culture of ice cream consumption in cafes
- Relatively high price for high-quality ice cream in time of income stagnation of the population. Ice cream is not a product of prime necessity that is why it is the first item to be excluded from the consumer basket when the income decreases.

**Table 65. Level of consumption of ice cream and average customer expenditures, Russia, 2006-2010 (kg per annum; rubles per annum)**

	2006	2007	2008	2009	2010
Level of consumption of ice cream per capita (kg per annum)	2.6	2.6	2.5	2.4	2.7
Level of consumption of ice cream per consumer (kg per annum)	4.8	4.7	4.4	4.3	4.8
Average customer expenditures on ice cream per year (rubles per annum)	520.8	564.8	657.5	734.3	887.3

Source: *BusinesStat, Complex Analysis of Marketing Data*

**Table 66. Forecast of the level of consumption of ice cream and average customer expenditures, Russia, 2011-2015 (kg per annum; rubles per annum)**

	2011	2012	2013	2014	2015
Level of consumption of ice cream per capita (kg per annum)	2.8	2.9	3.0	3.1	3.1
Level of consumption of ice cream per consumer (kg per annum)	5.1	5.2	5.4	5.5	5.6
Average customer expenditures on ice cream per year (rubles per annum)	1,014.9	1,123.9	1,234.8	1,343.3	1,476.3

Source: *BusinesStat, Complex Analysis of Marketing*

In 2010, the consumption level of ice cream in Russia reached its ceiling. It equaled 2.65 kilograms per capita, and 4.78 kilograms per consumer unit.

In 2007-2009, all the parameters of the ice cream consumption reduced.

- Consumers began to eat less ice cream.
- Some consumers stopped buying ice cream at all.
- The population size in Russia decreased, and the number of consumers of ice cream reduced as well.

In 2010, all the parameters of ice cream consumption in Russia went up.

**Table 88. Actual volume of import of ice cream into Russia by country, 2006-2010 (tons)**

	2006	2007	2008	2009	2010
Armenia	5.9	-	-	-	-
Belgium	165.8	192.8	368.0	247.8	327.2
China	276.2	317.1	210.6	108.5	149.9
Estonia	-	-	62.6	75.3	-
Finland	91.0	318.2	575.9	196.3	90.9
France	1,604.2	1,605.6	1,280.9	700.7	827.1
Germany	1,411.5	2,492.0	2,297.1	1,356.9	1,906.1
Greece	-	199.4	16.9	5.7	14.2
Hungary	61.2	-	-	-	-
Italy	96.6	115.0	241.5	480.2	616.9
Japan	0.1	-	-	-	-
Kazakhstan	-	-	-	30.2	-
Korea, Republic	17.6	-	-	-	-
Latvia	0.0	1.7	1.6	-	-
Lithuania	175.6	342.2	264.0	176.6	56.7
New Zealand	-	-	-	11.8	-
Norway	76.6	123.8	107.6	86.6	99.3
Poland	-	-	143.8	60.8	-
Portugal	-	-	-	-	27.8
Serbia	-	-	-	-	22.6
South Africa	-	-	-	-	28.3
Spain	285.2	653.1	824.5	401.7	528.6
Sweden	0.7	-	-	-	-
Switzerland	547.8	758.9	912.6	678.2	1 125.7
Ukraine	454.3	510.7	460.4	627.0	560.2
United Kingdom, the	-	0.8	-	-	-
United States of America, the	18.7	44.0	55.8	38.9	38.9
<b>All countries</b>	<b>5,288.9</b>	<b>7,675.3</b>	<b>7,823.9</b>	<b>5,283.2</b>	<b>6,420.6</b>

Source: Federal Customs Service of the Russian Federation, Customs declaration / Transit Declaration for participants of the foreign economic activity "Record of Goods and Fund Transit across the Border".

Index "Import of Ice Cream" reflects the net amount of the goods, carried across the Russian border during the year. The measurement unit "Net cargo - tons" is obtained from weighing the cargo at the border, exclusive of the vehicle and package weight. Unit of account: all enterprises engaged in foreign economic activities in Russia.