

RUSSIAN CHEESE MARKET

2011

Issue 2 - Demo



GRCC GLOBAL
REACH
CONSULTING



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 cheese market.

The report covers the following key products:

- Fresh cheese and curd;
- Processed cheese;
- Blue-veined cheese;
- Grated and powdered cheese;
- Hard and semi-hard cheese;
- Other cheese.

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1.2. Key Research Areas

Specifically, the research aims to cover:

- World cheese market, including:
 - World cheese production;
 - World cheese trade (imports and exports);
- Russian cheese market, including:
 - Market volume;
 - Market value;
 - Market share of imported products;
 - Key market trends.
- Domestic cheese production, including:
 - Production volume;
 - Production by cheese type;
 - Geographical distribution of cheese production;
 - Largest cheese producers.
- Cheese imports, including:
 - Volume and value of imports;
 - Key products imports:
 - Other cheese;
 - Processed cheese;
 - Fresh cheese and curd;
 - Blue-veined cheese;
 - Grated and powdered cheese;

- Cheese exports, including:
 - Volume and value of exports;
 - Key products exports:
 - Fresh cheese and curd;
 - Processed cheese
 - Other cheese;
- Cheese consumption, including:
 - Per capita cheese consumption;
 - Consumption in rural and urban areas;
 - Consumer preferences.
- Cheese prices, including:
 - Producers' cheese prices;
 - Retail cheese prices.

1.3. Management Summary

World Cheese Market

Global cheese production is estimated at *** million tons.

World cheese production amounts to circa *** million tons. In 2011 cheese production is expected to grow by 1%.

European Union (EU) is the largest cheese producer with a share of ***%. The share of the US accounts for ***%. Russia is ranked the 5th among the largest cheese producers with a share of ***%.

Russian demand for cheese import is expected to maintain and Russia will become key market of European products sales.

Russian Cheese Market

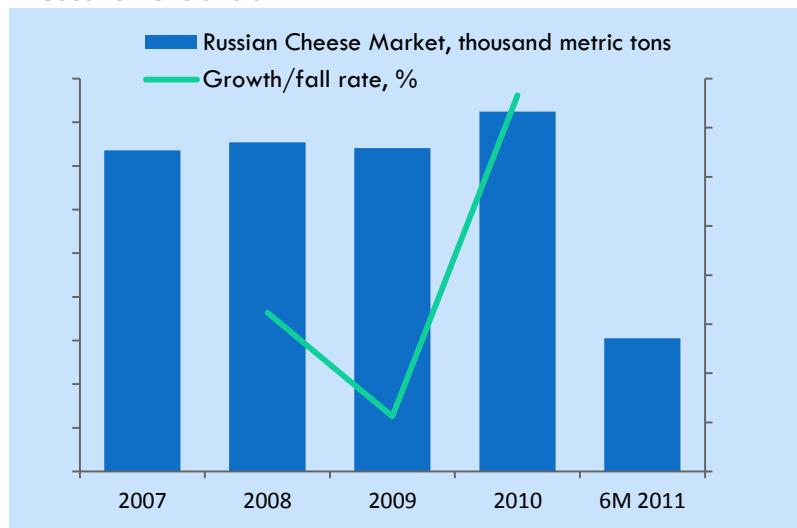
Retail sales of cheese in Russia have been growing rapidly.

Retail sales of cheese in Russia have been growing rapidly. In 2010 retail cheese sales accounted for *** billion RUB up 15.5% from 2009.

According to 2010 totals volume of Russian cheese market accounted for *** thousand metric tons, up 11.3% from the previous year.

The share of imported cheese amounts to 48.9% of the Russian market.

Figure 42. Russian Cheese Market Volume, 2007-6M 2011, Thousand Tons and %



Source: ***

The share of imported products in the Russian market has significantly grown and amounted to 48.9%, according to 2010 totals.

The beginning of 2010 experienced growth in import duties on cheese in the Russian Federation.

Russian Cheese Imports

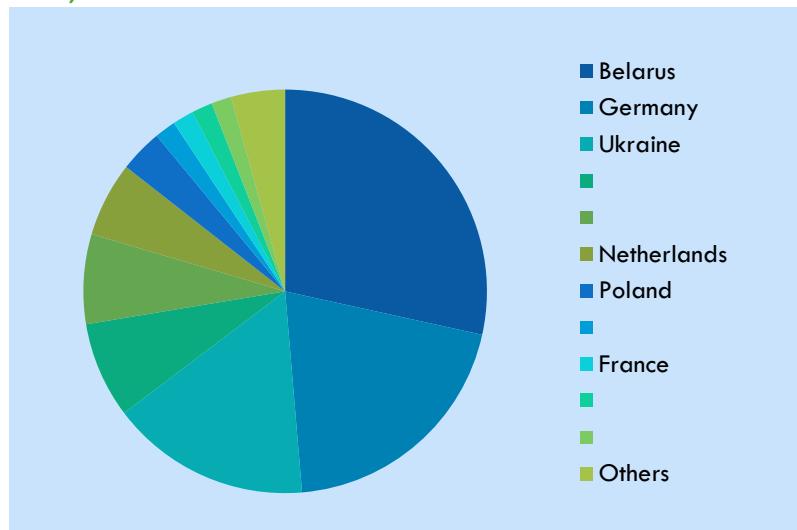
Cheese is the most imported dairy product in Russia.

Cheese is ranked the 1st among dairy commodities supplied to the Russian market. According to 2010 totals cheese supplies reached *** thousand metric tons, 27.1% rise over 2009.

Belarus, Germany and Ukraine are the largest cheese suppliers to Russia.

Belarus is the largest cheese supplier to the Russian market in volume terms. *** Germany is ranked the 2nd among the largest cheese suppliers with a share of ***% in volume.

Figure 54. Cheese and Curd Imports by Country (in Volume), 2010, %



Source: ***

VALIO, LTD is the largest importer in Russia with a share of ***% according to 2010.

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