

# RUSSIAN CHEESE MARKET

2011

Issue 2 - **Demo**





## 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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**The Report includes:** 58 Tables, 92 Figures (Graphics, Diagrams)

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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 5<sup>th</sup> 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.*

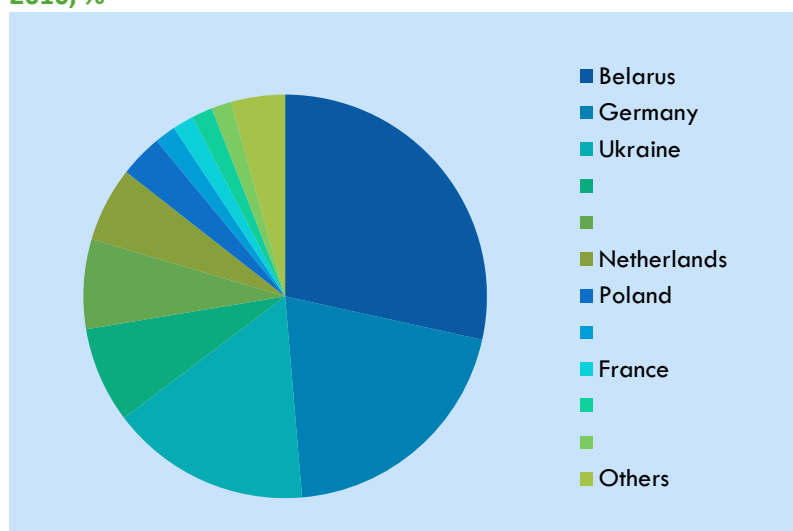
Cheese is ranked the 1<sup>st</sup> among dairy commodities supplied to the Russian market. According to 2010 totals cheese supplies reached \*\*\* thousand metric tons, 27.1% rise over 2009.

\*\*\*

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

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

**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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