

**Intesco
Research
Group**

WORLD RETAIL MARKET. RUSSIAN RETAIL MARKET. LARGEST RETAIL NETWORKS



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“Okey” LTD
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“Sedmoy Continent” JSC
“Gorodskoy supermarket” LTD
“Novy Impuls - 50” LTD
“T & K Products” CJSC
“Enka” trade centre LTD
“Avoska-dva” LTD
“Mosmart” CJSC
“Chain of self-service stores “Aliye Parusa” LTD
“Element-Trade” LTD
“Grinn” corporation
“Holiday” GC
“Maria-Ra” LTD
“Noviye trgovkiye sistemy” JSC
“Wester” GC
“Supermarket “Kirovsky” CJSC

“Sistema RegionMart” LTD
“Sibirsky gigant” LTD
“Intertorg” trade house LTD
“Lyubavushka” LTD
“Evropa” LTD
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“Ritm-2000” LTD
“Tverskoy product” LTD
“ORT “Universam” JSC
“RegionTorg” LTD
“Forward” JSC
“Matritsa-Holding” JSC
“Salut-Torg” LTD
“Behetle-1” LTD
“Optovik” LTD
“Kazansky trgovy dom” JSC
“Intertorg” LTD
“Center restructurizatsii” LTD
“Aikai” LTD
“Duplet” LTD
“Radezh” LTD
“Gulliver” CJSC
“Shad” LTD
“MAN” LTD
“Pallada torg” CJSC
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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

WORLD RETAIL MARKET. RUSSIAN RETAIL MARKET. LARGEST RETAIL NETWORKS.

Goal of research:

ASSESSMENT OF SITUATION ON THE MARKET & FORECAST OF ITS DEVELOPMENT FOR 2012-2014

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

WORLD MARKET OF RETAIL TRADE

DEVELOPMENT OF RETAIL TRADE IN RUSSIA

TURNOVER OF RUSSAIN RETAIL MARKET

COMMODITY STOCK

IMPORT SHARE

SEGMENTS OF RETAIL TRADE

RETAILING ENTERPRISES

LARGEST RETAILERS

MAIN TRADING NETWORKS OF FMCG

HOUSE TARDEMARKS OF TRADING NETWORKS

ONLINE RETAIL

PRICE FORMATION

CONSUMERS` PREFERENCES

STATE REGULATION OF RETAIL TRADE

RETAIL PROPERTY MARKET (INFLUENCING MARKETS)

TRENDS ON RETAIL MARKET

FORECAST OF RETAIL MARKET DEVELOPMENT

Information sources used:

Federal State Statistics Service

Ministry of economic development of RF

Federal Customs Service
Federal Tax Service
Field expert evaluations
Retail sales reports
Materials of the field's main players
Field print and electronic publications

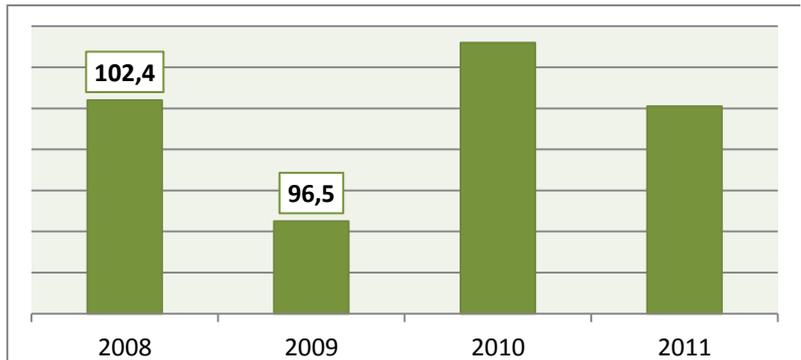
The research contains 52 schedules, 69 diagrams, 14 tables.

EXTRACTS FROM RESEARCH

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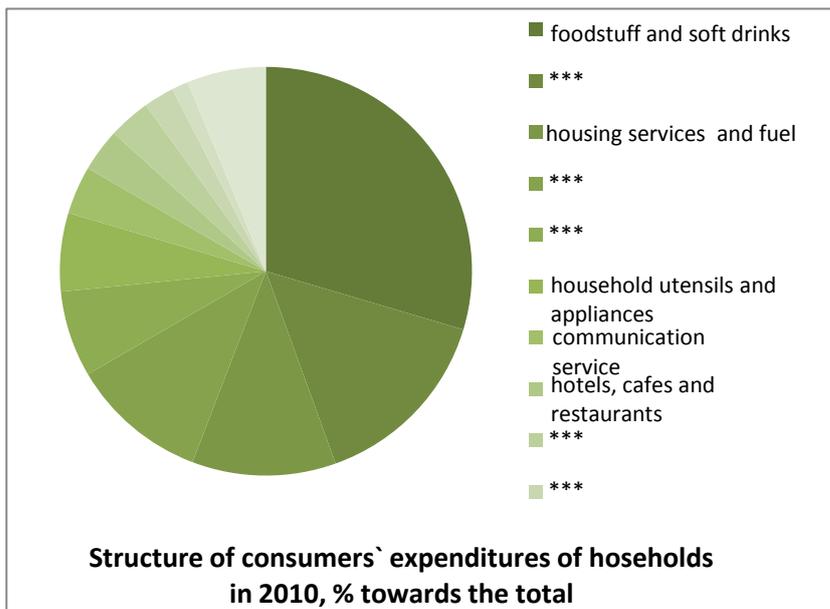
DEVELOPMENT OF RETAIL TRADE IN RUSSIA

The actual salary has been increasing through the period of 2008-2011 slower: the highest increase by ***% was observed in ***. But *** played here a role. In 2011, the growth amounted to ***%. The experts suppose *** the annual increase in actual salary in the nearest future.



Dynamics of actual salary growth in 2008-2011, % towards the previous year

*** is a next cost-based item of expenses with the share of ***% of overall expenses. About by 10% of households was spent on *** and ***.



Structure of consumers' expenditures of households in 2010, % towards the total

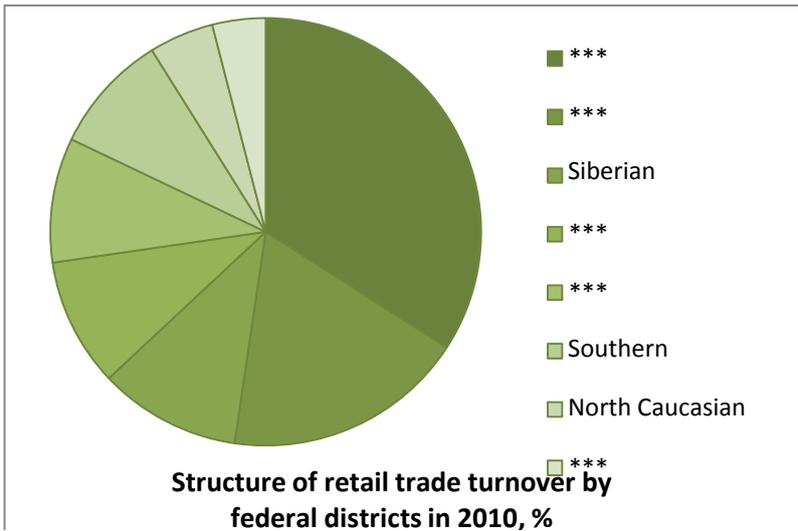
*** (1,3%) and *** (2,4%) had the smallest share in the structure of expenses.

CHAPTER 5

TURNOVER OF RUSSIAN RETAIL MARKET

The result of *** was an increase in retail trade turnover.

In 2011, the turnover of retail trade in Russia reached *** trl. rubles. The surplus per a year accounted for ***%. The turnover of retailing has increased almost in *** times since 2007. The maximal surplus was shown in *** and amounted to 28%.



*** had most of retail trade turnover in 2010 (***%). It was followed by *** federal district lagging behind in almost two times with the share of ***%. There were realized by about 10% of retail trade turnover in Siberian, ***, *** and Southern districts.

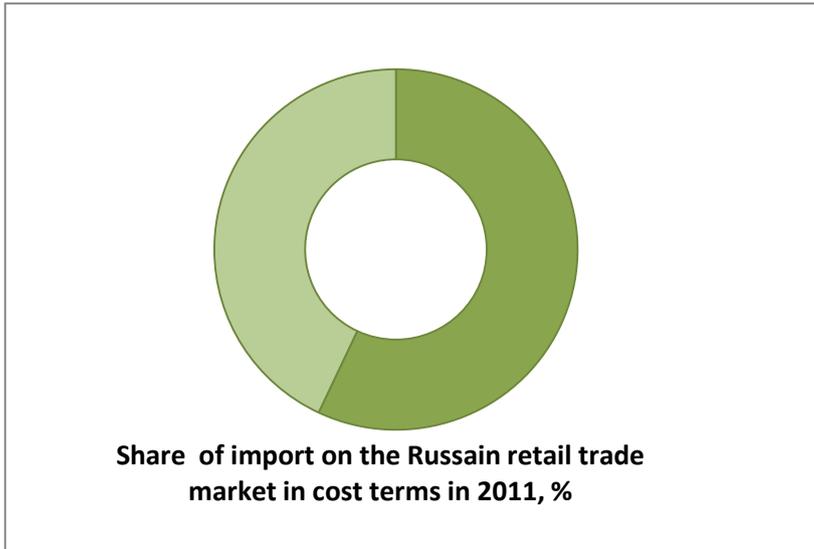
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IMPORT SHARE

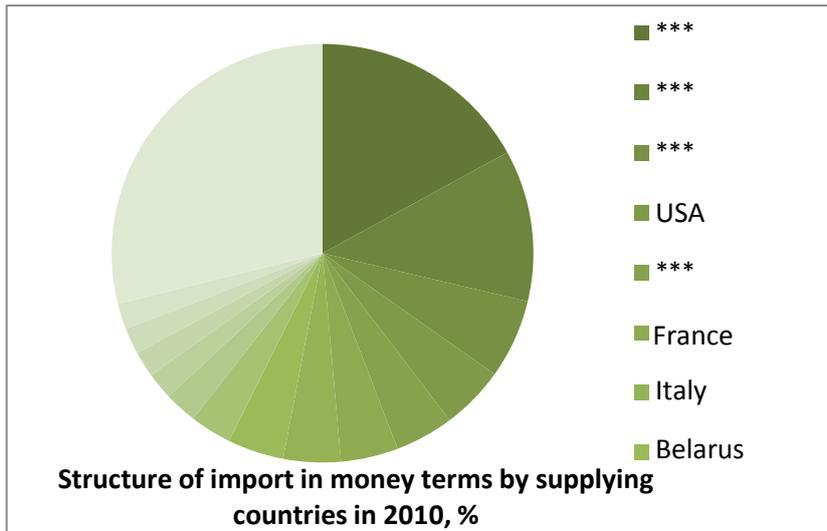
Russian retail trade in 2011 was by ***% supplied with domestic production..

The greatest share of foreign products in 2010 was recorded for *** as well as dry milk and creams – about ***%.

In 2010, the import share for *** (by 10 p.p.), pork (by *** p.p.) dropped considerably.



*** is a major trade partner of Russia in 2010. The import volume from it was *** bln. dollars. In 2010, the goods to the sum of 26 bln. dollars were imported from ***. *** had substantially lower share of imported products – to the sum of *** bln. dollars.



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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches both on federal and regional levels of RF. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans, the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian Academy of Economics after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, highly-qualified specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “RBK daily”, “Tsenovick”, “Moe delo. Magazin”, “MAXIM”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Unipack.Ru”, and etc.

OUR CLIENTS



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