



**Intesco
Research
Group**

FAST FOOD AND FAST FOOD MARKET



MOSCOW 2014

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

FAST FOOD MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2014-2016

Regions of research:

RUSSIA AND LARGEST CITIES, REGIONS OF RF

Main blocks of research:

GENERAL ECONOMIC SITUATION IN RUSSIA
RUSSIAN PUBLIC CATERING MARKET
RUSSIAN FAST FOOD MARKET VOLUME
LARGEST PLAYERS ON FAST FOOD MARKET
TRENDS ON FAST FOOD MARKET
STATE REGULATIONS OF THE MARKET
CONSUMER PREFERENCES
FORECAST OF FAST FOOD MARKET

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

Federal State Statistics Service
The Ministry of Economic Development
The Federal Customs Service
Industry experts' estimates
Reports on retail sales
Data of the main players of the branch
Printed and electronic publications of the branch

The research contains 16 schedules, 9 diagrams, 10 tables and 1 picture.

EXTRACTS FROM RESEARCH

CHAPTER 3

VOLUME OF THE RUSSIAN FAST
FOOD MARKET

As for 2013 public catering market turnover reached ** billion rubles and per capita parameter amounted to ** rub/person. In the closets time a slight slowing down of the growth is expected due to new wave of crisis in Russia. As practice shows in these periods people tend to decrease expenses for entertainment and eating out.

Russian public catering market is characterized by seasonality: the minimum turnover is observed in the first quarter of the year (January), the largest – in the last quarter. In 2009 a considerable decrease in the growth rates was observed in 2009 with the seasonality preserved, but revenues of Russian catering facilities were by 7,5% lower in the second half of the year than in the previous year. In 2010 the parameters were apt to grow.

In the last quarter proceeds of public catering facilities were higher. It was due to high demand for corporate events in café and restaurants. Besides, the growth was also due to pricing on the market of restaurant services during this period, prices in the menu increase by 5-10%.

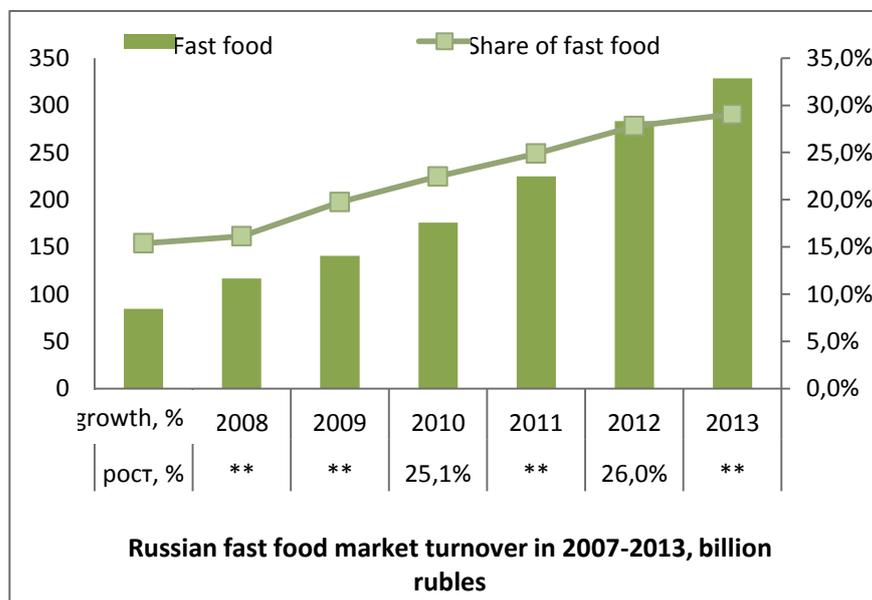
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RUSSIAN PUBLIC CATERING
MARKET VOLUME

During 2008-2012 fast food market increased dynamically and even in the crisis 2009, when the largest part of enterprises were short of the clients flow, fast food continued to grow with relatively high rates: public catering market in general decreased by 1,6%, and fast food segment increased by **,4%.

In 2013 rate of the market growth slowed down to **%. It was due to saturation of large cities markets, on the one hand, and Russian economy slowing down on the other hand. Studies showed that during the pre-crisis period people decrease eating out expenses. In particular, public catering market will not be so affected (judging by 2009) but the growth will slow down.

In 2013 market turnover increased by **%, and reached ** billion rubles. It amounted to



** ,1% of public catering market in general. Compared to 2007 this parameter was equal to **,4%.

The main trend of the market is regional expansion. Fast food networks strengthened their positions in two

capitals and began to develop in regions of Siberia, Ural and Southern Regions. In the closest future their growth will be moderate and systematic.

CHAPTER 5

LARGEST PLAYERS OF FAST
FOOD MARKET

"Teremok" is a Russian fast food network, presented nowadays in Moscow and St. Petersburg. Сейчас Now "Teremok" is represented by 3 formats: street stands, fixed-site restaurants and food courts in the shopping centers.

In the street stands only pancakes are sold, and in fixed-site restaurants cereals and soups added into the range of products.

As of April, 2014 "Teremok" network in Moscow and Moscow Region was represented by ** cafes where the share of street stands made only **objects or 14,7% (all of them are located in the capital). In St. Petersburg **cafes functioned, and about a half of them worked in street stands format.

In 2013 their turnover was estimated by the owner of the company - Mikhail Goncharov at ** billion rubles in Moscow and ** billion rubles in St. Petersburg. Two more sale points were opened on franchise as an experiment: in Tyumen and Surgut. At the end of 2013 "Teremok" opened in Krasnodar. The choice of the city is determined by the fact that Krasnodar is the leader of all business ratings, and also a large number of shopping centers.

LIS OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

INTESCO RESEARCH GROUP is the analytical group, having its principal directions of activity in development of high-quality business plans, feasibility studies and marketing researches of both Russia's and regional markets 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 research and development methods. When conducting marketing researches and developing the business plans the group 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 named 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, high-quality 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", "MAXIM", "Partner: myasopererabotka", "Moe delo. Magazin", "Odnako", "Khlebopekarnoe proizvodstvo", "Producty i Pribyl", "Konditerskaya sfera/khlebopechenie", "Tsenovik", "RBK daily", "Unipack.Ru", etc.

OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
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