

**Intesco  
Research  
Group**

# CATERING AND CATERING MARKET



MOSCOW 2014

## CONTENTS

<b>CONTENTS.....</b>	<b>3</b>
<b>RESEARCH METHODOLOGY.....</b>	<b>5</b>
<b>EXTRACTS FROM RESEARCH.....</b>	<b>6</b>
<b>LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES.....</b>	<b>9</b>
<b>ABOUT INTESCO RESEARCH GROUP .....</b>	<b>14</b>

## CONTENTS

### RESEARCH METHODOLOGY

### LIST OF SCHEDULES, DIAGRAMS AND TABLES

#### 1. CHARACTERISTICS OF RUSSIAN CONSUMERS

##### 1.1. Russia (in general)

*Population dynamics*

*Social standard of living*

*Largest regions of RF*

*Social standards of living dynamics in the largest regions*

*Largest cities*

##### 1.2. Moscow and Moscow Region

##### 1.3. Saint Petersburg

#### 2. SUBJECT OF RESEARCH

##### 2.1. Public catering

##### 2.2. Catering

#### 3. VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

##### 3.1. Public catering market of RF

*Dynamics by years*

*Dynamics by quarters*

*Turnover of Russian public catering market comparing with other countries*

*Eating out costs*

##### 3.2. Largest regions of RF by public catering turnover

*Public catering turnover in federal districts*

*Public catering turnover in constituent entities of RF*

*Volume of public catering market of Moscow*

*Volume of public catering market of Saint Petersburg*

*Public catering turnover in million-strong cities of RF*

*Regional peculiarities*

##### 3.3. Consumer preferences on the Russian public catering market

*Consumer preferences according to formats of public catering facilities*

*Market leaders by attendance in the largest cities*

*Preferences of Moscow residents*

#### 4. NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF RF

##### 4.1. Total number of public catering facilities in Russian million-strong cities

##### 4.2. Number of public catering facilities in Russian million-strong cities

*Moscow*

*Saint Petersburg*

**5. RUSSIAN CATERING MARKET**

5.1. Volume of Russian and Moscow catering market

5.2. Enterprises on Russian catering market

*Regional market structure*

*Segmentation of companies by the main types of provided services*

**6. MARKET OF FIXED-SITE AND EVENTFUL CATERING OF MOSCOW**

6.1. Segmentation of companies by the main types of provided services

6.2. Segmentation of companies by type and scale of the event

6.3. Characteristics of companies activity

**7. MARKET OF FIXED-SITE AND EVENTFUL CATERING OF SAINT PETERSBURG**

7.1. Segmentation of companies by the main types of provided services

7.2. Segmentation of companies by type and scale of the event

7.3. Characteristics of companies activity

**8. FIXED-SITE AND EVENTFUL CATERING IN REGIONS OF RF****9. TRANSPORT CATERING MARKET**

9.1. Catering in trains

9.2. Catering in aircrafts

**10. LARGEST COMPANIES ON RUSSIAN CATERING MARKET**

10.1. Largest companies on Moscow market

10.2. Largest companies on Saint Petersburg market

**11. TRENDS ON RUSSIAN CATERING MARKET****12. FACTORS INFLUENCING CATERING SERVICES MARKET****13. FORECAST OF RUSSIAN CATERING MARKET FOR 2015-2017****ABOUT INTESCO RESEARCH GROUP**

## RESEARCH METHODOLOGY

**Subject of research:**

RUSSIAN CATERING MARKET

**Goal of research:**

EVALUATION OF THE MARKET CONDITION AND IDENTIFYING OF THE MAIN TRENDS OF ITS DEVELOPMENT FOR 2015-2017

**Regions of research:**

RUSSIA, REGIONS OF RF, LARGEST CITIES OF RF

**Main blocks of research:**

CHARACTERISTICS OF RUSSIAN CONSUMERS  
VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET  
NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF RF  
RUSSIAN CATERING MARKET  
MARKET OF FIXED-SITE AND EVENTFUL CATERING MOSCOW  
MARKET OF FIXED-SITE AND EVENTFUL CATERING SAINT PETERSBURG  
FIXED-SITE AND EVENTFUL CATERING IN REGIONS OF RF  
TRANSPORT CATERING MARKET  
LARGEST COMPANIES ON RUSSIAN CATERING MARKET  
TRENDS ON RUSSIAN CATERING MARKET  
FACTORS INFLUENCING CATERING SERVICES MARKET  
FORECAST OF RUSSIAN CATERING MARKET FOR 2015-2017

**The sources of information, which are used in the research:**

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 42 schedules, 23 diagrams, 21 tables.**

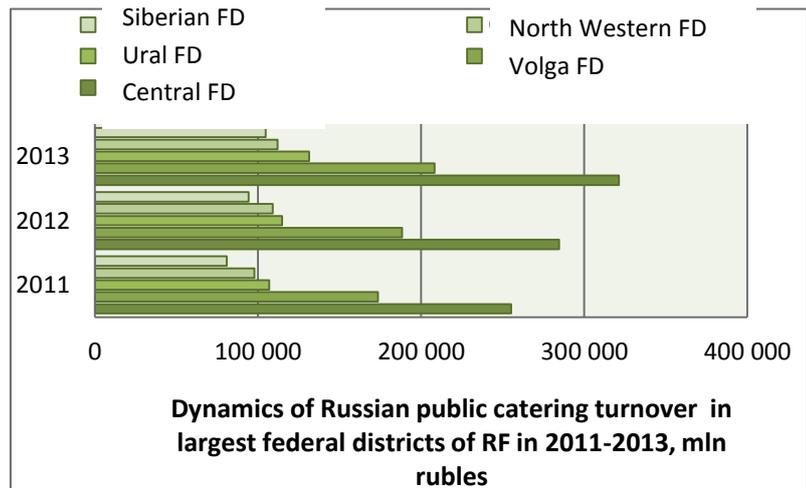
## EXTRACTS FROM RESEARCH

### CHAPTER 3

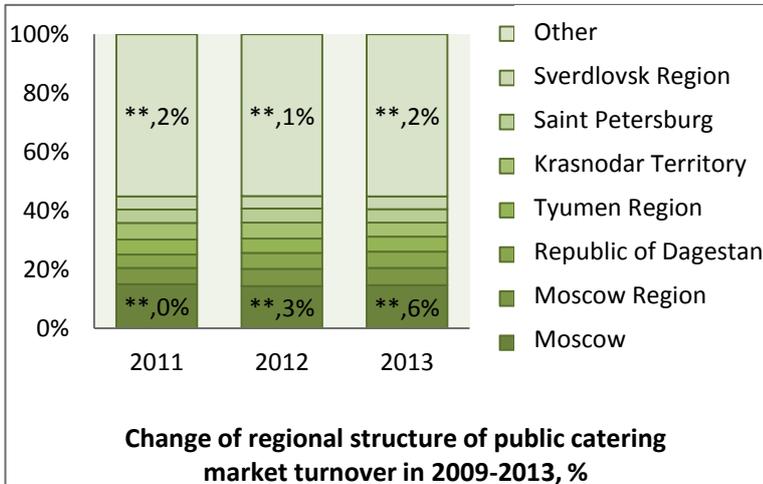
#### VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

The largest federal district by the public catering turnover is Central FD. In 2013 the volume of services of this branch amounted to **\*\*\*,1** billion rubles, Moscow accounted for **\*\*%** out of them. Volga FD ranked second (**\*\*,3** billion rubles), Ural FD – third (**\*\*\*,2** billion rubles).

The greatest relative growth of the parameter in 2013 was marked in North Caucasian federal district (**\*\*%** compared to 2011) that speaks about fast rates of the market development in regions of this district, in particular in Republic of Dagestan.



The share of Moscow in regional public catering market turnover structure in 2013 amounted to **\*\*%**. During the surveyed period of (2009-2013) parameters decreased by 2%.



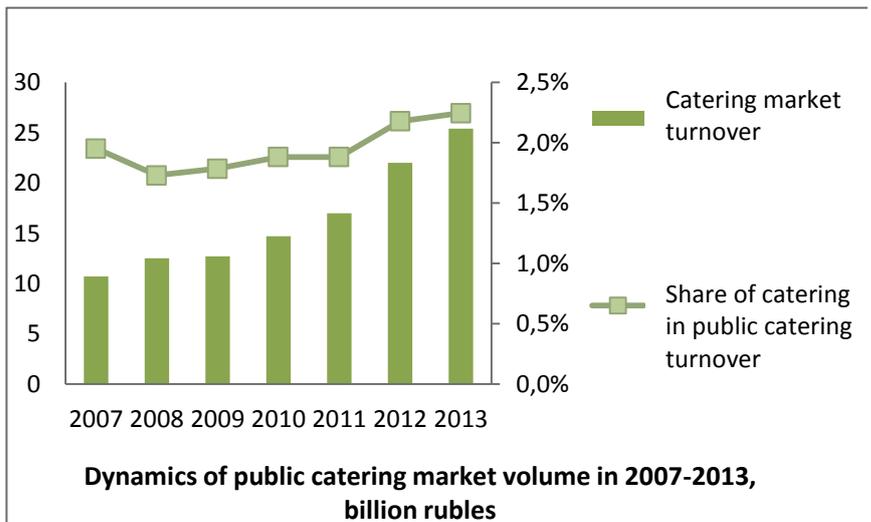
Significant changes since 2009 were marked in Tyumen Region (the decrease by **\*** %) and Republic of Dagestan (growth by **\*** %). An increase of the aggregate share of Krasnodar Territory by **\*** % (to **\*\*%**) was caused by the expansion of the service sphere during the preparation to the Olympics of 2014.

**CHAPTER 5**

**RUSSIAN CATERING MARKET**

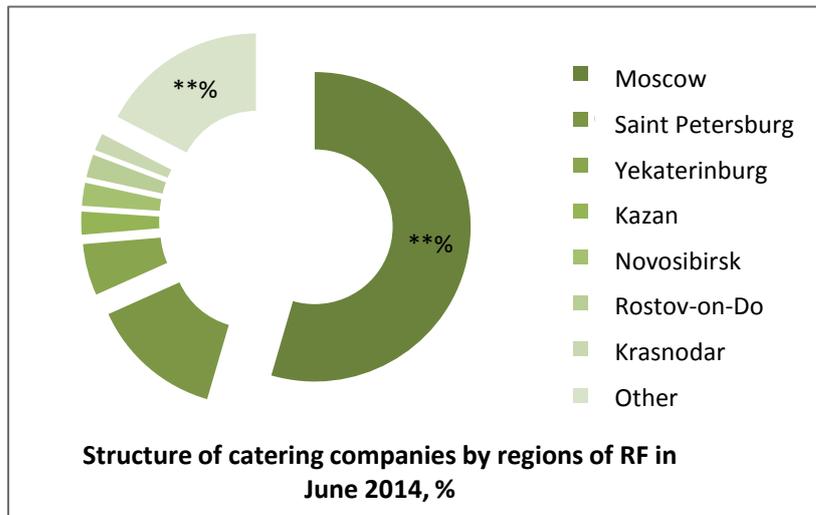
The main markets of outdoor service are concentrated in Moscow and to a lesser extent in Saint Petersburg. More than one half of office segment volume in Moscow is concentrated, thus \*\*% of the industrial market are concentrated in regions where the quantity eating on one industrial facility can make some tens of thousands of people that is comparable with several office centers in Moscow

Geography of catering market of the Russian Federation is rather wide, where number of regions with enterprises in the declared segment of public catering market function, include: Moscow and Saint Petersburg. Distribution is influenced, certainly, by number of consumers, as at present, and possible in the long term. That is also important, how often large



**Dynamics of public catering market volume in 2007-2013, billion rubles**

cultural, sporting or political events demanding a large number of the service personnel and individually developed holding plan takes place in the city.



**Structure of catering companies by regions of RF in June 2014, %**

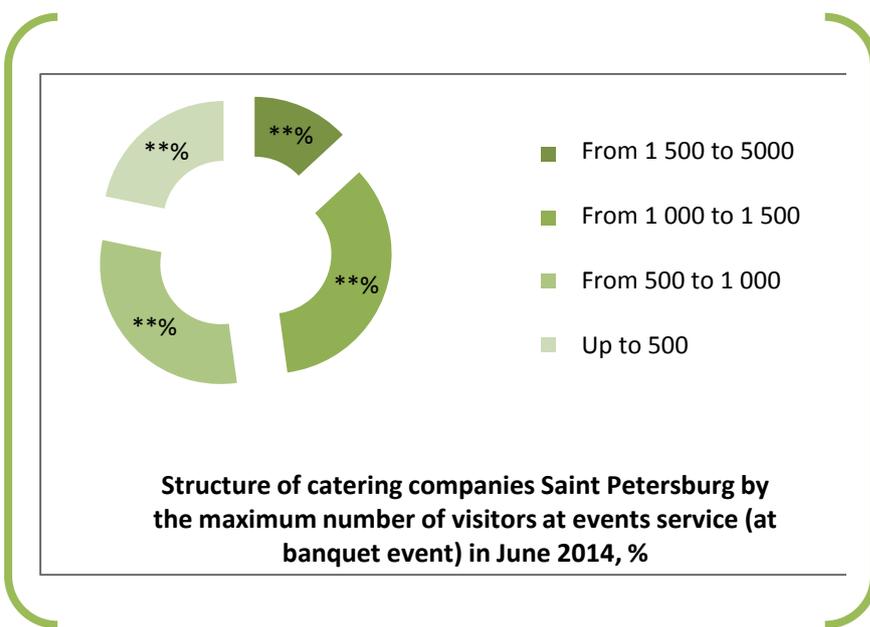
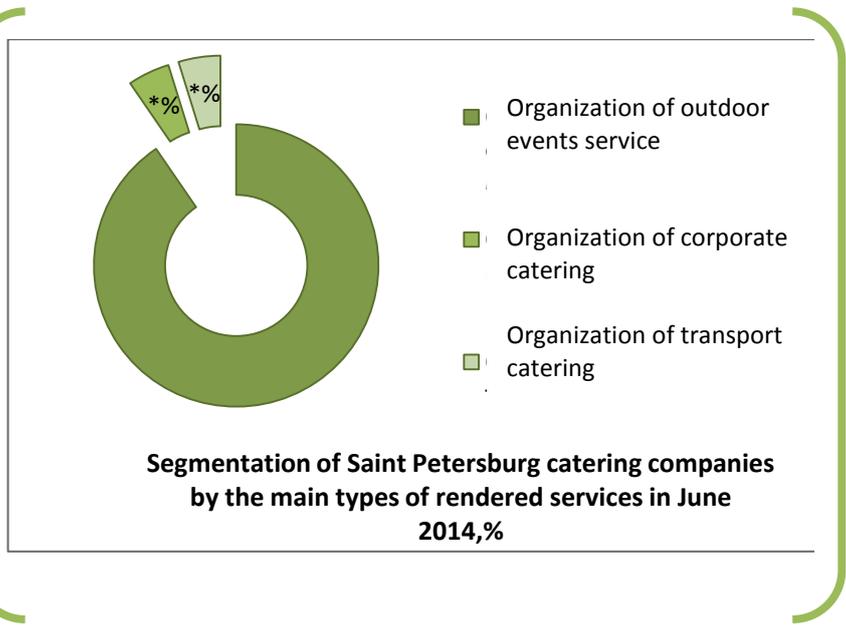
**CHAPTER 7**

**MARKET OF FIXED SITE AND EVENTFUL CATERING OF SAINT PETERSBURG**

Characterizing catering industry of Saint Petersburg which has developed by June, 2014, it should be marked that those companies which form 90% of the offer, are engaged in event catering. The popular direction in the city and region is organization of banquets and buffet receptions on the territory of farmstead and palace complexes, with immersion in the old times atmosphere, with providing the menu made in style of traditional Russian cuisine. Specific weight of the companies organizing as corporate food at offices, and transport, makes \*\*% (at each type of service).

Peculiarity of the Petersburg market is that any of the presented companies is not accredited according to the specialized program: "CATERING PROFESSIONAL". One third

of organizations belonged to banquet service format type which could serve number of guests ranging from 500 to 1 thousand. More than one fifth of the offer (\*\*%) is the share of companies working for smaller target audience (up to 500 persons).



## LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

### RESEARCH METHODOLOGY

#### LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

##### 1. CHARACTERISTICS OF RUSSIAN CONSUMERS

- Schedule 1. Population of Russia dynamics in three forecast variants in 2011-2031, ths people
- Schedule 2. Dynamics of actual disposable money income of the population and annual rate of their growth in 2000-2013, %
- Table 1. Number of the largest RF regions population in 2000-2010 and forecast for 2010-2020
- Table 2. Average money incomes in regions of RF in 2011-2012, rubles
- Table 3. Number of population of the largest Russian cities according to the Census of 2010 and January 1, 2013, ths people
- Schedule 3. Dynamics of constant Moscow population number in 2000-2014\* (as of 01.11.2013), mln people
- Diagram 1. Structure of the population distribution in administrative districts of Moscow Region as of January, 1 in 2000-2013, mln people
- Schedule 4. Dynamics of average monthly salary of the resident of Moscow by years in 2003-2013\*, ths rubles
- Table 4. Average monthly salary of Moscow resident in general and in cafes and restaurants by years in 2003-2013\*, rubles
- Schedule 5. Average money incomes of Moscow population in 2009-2013, ths rubles
- Table 5. Average money incomes of Moscow population by months in 2009-2013, rubles
- Schedule 6. Share of expenses of Moscow residents for eating out in 2000-2013\*, %
- Schedule 7. Dynamics of the number of constant Saint Petersburg population in 2011-2014\* (as of 01.01.2014), mln people
- Diagram 2. Structure of Saint Petersburg population distribution by districts in 2013, %
- Schedule 8. Dynamics of the number of constant residents of Leningrad Region in 2000-2014\* (as of 01.01.2014), mln people
- Schedule 9. Dynamics of average monthly salary of the resident Saint Petersburg by years in 2002-2013, ths rubles
- Table 6. Average monthly salary of Saint Petersburg resident in general and in cafes and restaurants by years in 2002-2013, rubles
- Schedule 10. Average money incomes of Saint Petersburg population in 2007-2012, ths rubles
- Schedule 11. Share of expenses for catering services in total volume of expenses for services in 2004-2012\*, %

##### 2. SUBJECT OF RESEARCH

##### 3. VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

- Schedule 12. Dynamics of Russian public catering market turnover in RF and per capita in 2003-2013
- Schedule 13. Dynamics of Russian public catering market by quarters in 2007-2013, billion rubles
- Schedule 14. Food products retailing turnover in some countries of Europe in 2012, billion dollars
- Schedule 15. Share of public catering expenses by rating of several countries of Europe in 2012, %
- Table 7. Rating of several European countries by families expenses for food, alcohol and tobacco, restaurants and cafes, hotels, leisure and culture in 2012, %
- Diagram 3. Relation of Russian residents to eating-out, as to an expensive event, in 2012, %
- Table 8. Eating-out expenses by regions of RF in 2009-2011 rub
- Table 9. Public catering turnover in federal districts in 2009-2013, mln rubles
- Schedule 16. Dynamics of Russian public catering turnover in largest federal districts of RF in 2011-2013, mln rubles
- Diagram 4. Change of structure of Russian public catering turnover by federal districts in 2011-2013, %
- Table 10. Volumes of public catering market turnover in regions of RF in 2009-2013, mln rubles
- Schedule 17. Dynamics of Russian public catering turnover in main regions of RF in 2011-2013, mln rubles
- Diagram 5. Change of regional structure of public catering market turnover in 2009-2013, %
- Schedule 18. Dynamics of Moscow public catering market turnover in 2009-2013, billion rubles
- Diagram 6. Изменение доли Москвы в обороте общественного питания России в 2009-2013 гг., %
- Table 11. Dynamics of restaurants, canteens and bars proceeds (besides taxes, excises etc.) in Moscow in 2009-2013, mln rubles.
- Schedule 19. Dynamics of Saint Petersburg public catering market turnover in 2009-2013, billion rubles
- Schedule 20. Change of Saint Petersburg share in RF public catering turnover in 2009-2013, %
- Schedule 21. Public catering turnover in million-strong cities of RF in 2011, billion rubles
- Schedule 22. Per capita public catering turnover in million-strong cities of RF in 2011, the rubles/person
- Table 12. Shares of million-strong cities in total RF population and in total RF public catering enterprises turnover in 2011, %
- Schedule 23. Residents visiting fast food facilities, street food and canteens in 2011, % respondents visiting public catering facilities during the past half of the year
- Schedule 24. Residents visiting public catering facilities of different formats in 2011, % respondents visiting public catering facilities during the past half of the year
- Schedule 25. Average expenses in public catering facilities in different regions of the world in 2007, 2012 and forecast for 2017, dollar/person
- Diagram 7. Structure of working Russian population nutrition organization while working day, %

Schedule 26. Rating of changes, which Russians want to see in restaurants, cafes and bars in 2013, %

Schedule 27. Most attended public catering networks in cities of Russia in 2012, %

Schedule 28. Most attended democratic restaurants networks in Moscow and Moscow Region in 2012, %

#### **4. NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF RF**

Table 13. Availability of public catering objects by RF districts and regions as of beginning of 2012

Table 14. Number of cafe and restaurants in largest RF cities as of February 2013

Schedule 29. Dynamics of public catering enterprises number of Moscow in 2009-2013, the facilities

Table 15. Dynamics of public catering enterprises number of Moscow in 2011-2013, objects

Diagram 9. Structure of Moscow public catering market by types of facilities in 2013, %

Diagram 10. Detailed structure of public catering facilities by types of facilities in Moscow in the beginning of 2014, %

Schedule 30. Dynamics of seats number on public catering facilities of Moscow in 2007-2013 (as of 01.10.2013) as per 1 thousand residents

Table 16. Dynamics of seats number on public catering facilities of Moscow by administrative districts in 2010-2013 as per 1 thousand residents

Schedule 31. Seats number on public catering facilities Moscow by AD in 2013 as per 1 thousand residents

Schedule 32. Rating of Moscow districts by seats number in 2013 (as of 01.10.2013) per 1 thousand residents

Diagram 11. Structure of restaurants and cafes Moscow by average bill size in June 2014, %

Schedule 33. Structure of public catering facilities of Moscow by type of cuisine in the beginning of 2014, units

Diagram 12. Structure of public catering structure by districts by number of enterprises in 2011, %

Diagram 13. Structure of catering companies by regions of RF in June 2014, %

Schedule 34. Dynamics of public catering enterprises number in Saint Petersburg in 2009-2013, units

Schedule 35. Seats number on public catering facilities Saint Petersburg by districts in 2013 as per 1 thousand residents

Schedule 36. Satisfaction of the population with public catering facilities number in districts of Saint Petersburg in 2011-2013, %

Schedule 37. Rating of provision with public catering facilities of different types (share of positive responds on the question of this of that type shortage) in 2011-2013, %

Schedule 38. Detailed structure of public catering facilities by types of facilities in Saint Petersburg in June 2014, %

Schedule 39. Structure of public catering facilities of Saint Petersburg by type of cuisine in June 2014, units

Schedule 40. Structure of restaurants and cafes of Saint Petersburg by average bill size in June 2014, %

## **5. RUSSIAN CATERING MARKET**

Schedule 41. Dynamics of public catering market volume in 2007-2013, billion rubles

Diagram 14. Share of accredited companies on «CATERING PROFESSIONAL» program in total number of catering companies of RF in June 2014, %

Table 17. Number of largest catering companies in RF cities in June 2014

Diagram 15. Segmentation of RF catering companies by the main types of provided services in June 2014,%

Diagram 16. Share of accredited companies on «CATERING PROFESSIONAL» program in total number of Moscow catering companies in June 2014, %

## **6. MARKET OF FIXED-SITE AND EVENTFUL CATERING OF MOSCOW**

Diagram 17. Segmentation of Moscow catering companies by the main types of provided services in June 2014,%

Diagram 18. Structure of Moscow catering companies by the maximum number of visitors at events service (at banquet event) in June 2014, %

Diagram 19. Structure of catering companies Moscow by the maximum number of visitors at events service (at cocktail dinner event) in June 2014, %

Diagram 20. Segmentation of Saint Petersburg catering companies by the main types of provided services in June 2014,%

Table 18. Moscow catering companies in June 2014

## **7. MARKET OF FIXED-SITE AND EVENTFUL CATERING OF SAINT PETERSBURG**

Diagram 21. Structure of catering companies Saint Petersburg by the maximum number of visitors at events service (at banquet event) in June 2014, %

Diagram 22. Structure of catering companies Saint Petersburg by the maximum number of visitors at events service (at cocktail dinner event) in June 2014, %

Diagram 23. Segmentation of RF regions catering companies (without Moscow and Saint Petersburg) by the main types of provided services in June 2014,%

Table 19. Saint Petersburg catering companies in June 2014

## **8. FIXED-SITE AND EVENTFUL CATERING IN REGIONS OF RF**

Diagram 24. Сегментация кейтеринговых компаний в регионах РФ (без учета Москвы и СПб) по основным видам оказываемых услуг в июне 2014 г.,%

Table 20. Catering companies in several regions of RF in June 2014

## **9. TRANSPORT CATERING MARKET**

## **10. LARGEST COMPANIES ON RUSSIAN CATERING MARKET**

## **11. TRENDS ON RUSSIAN CATERING MARKET**

## **12. FACTORS INFLUENCING CATERING SERVICES MARKET**

**13. FORECAST OF RUSSIAN CATERING MARKET FOR 2014-2017**

Schedule 42. Catering market volume in 2010-2013 and forecast for 2014-2016, billion rubles

**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 on federal and Regional levels. 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 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  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

**E-mail: [info@i-plan.ru](mailto:info@i-plan.ru)**

**Web-site: [www.i-plan.ru](http://www.i-plan.ru)**

**Tel.: +7 (495) 212-91-91**