



**Intesco
Research
Group**

RUSSIAN PUBLIC CATERING MARKET



MOSCOW 2014

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RESEARCH METHODOLOGY

Subject of research:

RUSSIAN PUBLIC CATERING MARKET

Goal of research:

EVALUATION OF THE MARKET AND IDENTIFYING OF THE MAIN TRENDS OF ITS DEVELOPMENT FOR 2016

Регион исследования:

RUSSIA, RF REGIONS

Regions of research:

CHARACTERISTICS OF RUSSIAN CONSUMERS
VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET
NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF RF
LARGEST NETWORKS OF RUSSIAN PUBLIC CATERING FACILITIES
TRENDS IN THE RUSSIAN PUBLIC CATERING MARKET
RUSSIAN FAST FOOD MARKET
RUSSIAN PRIVATE CATERING MARKET
FORECAST OF THE RUSSIAN PUBLIC CATERING MARKET DEVELOPMENT FOR 2016

Field players analyzed:

The largest Russian public catering networks
The largest Russian restaurant operators and catering companies in Russia

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 48 schedules, 50 diagrams, 41 tables and 1 scheme.

EXTRACTS FROM RESEARCH

CHAPTER 3

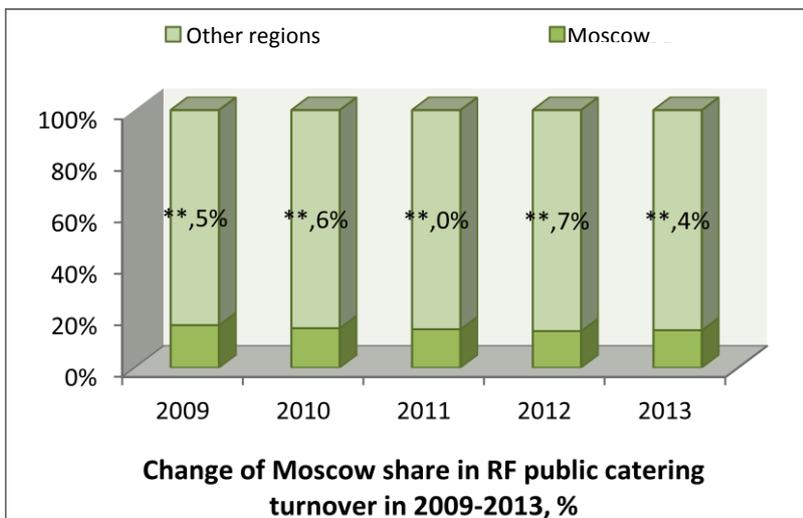
VOLUME OF RUSSIAN PUBLIC CATERING MARKET

Volume of Moscow public catering market in 2009 amounted to 115,8 billion rubles.

During three quarters of 2010 public catering market turnover reached the parameter of **,9 billion rubles, that was 0,* billion rubles more, than the same parameter in January-September 2009.

In 2013 volume of Moscow restaurants, bars and

cafes and canteens market reached *** billion rubles. High rate of growth at the level of 13% allows to talk about a new stage of Moscow public catering market development associated to new players appearance, in particular, in fast-food sector.

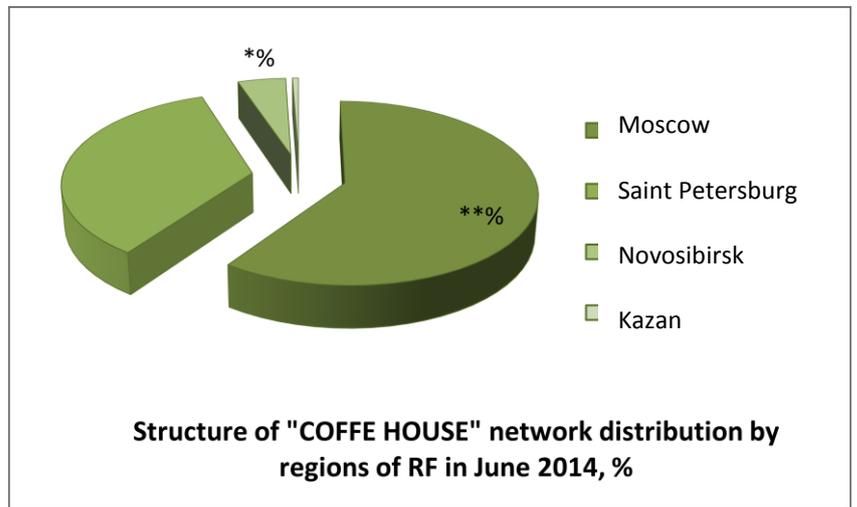


If we consider the share of Moscow in total volume of Russian public catering market in the dynamics, we can mark the trend to decrease of parameters. From 2009 to 2013 it decreased by 1,9 % (from **,5% to **,6%). Total decrease of the aggregate share of Moscow market reflects not the parameters decrease in Moscow but the increase of RF market capacity due to regional development (for example, in Krasnodar Territory).

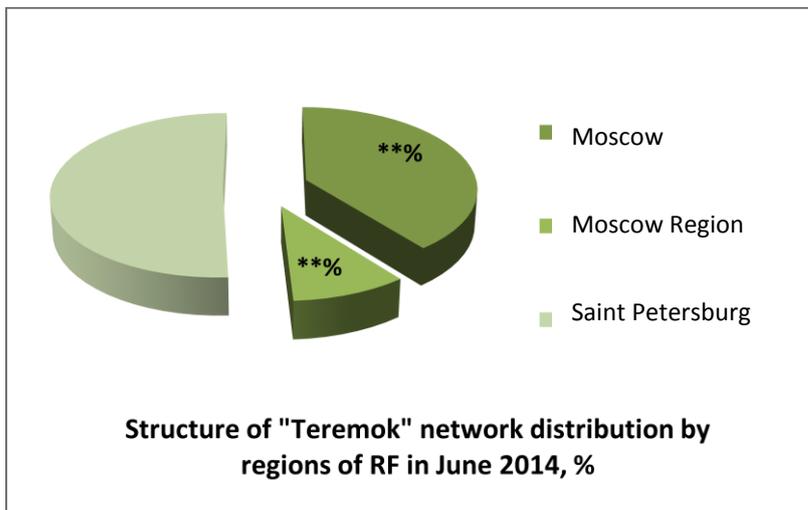
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LARGEST PUBLIC CATERING NETWORKS

Today “SHOKOLADNITSA” coffee houses network is one of the most dynamically developing companies in restaurants business sphere in Moscow, regions of Russia and CIS countries and is one of the main competitors of «COFFEE HOUSE» network. In structure of the network distribution in June 2014 more than half of outlets operated on the territory of Moscow (**%), slightly less one tenth – in Saint Petersburg (**%). In Moscow Region *,9% of total number of «SHOKOLADNITSA» coffee houses located. *,4 % of enterprises were located in Yekaterinburg and Nizhny Novgorod.



In June 2014 share of Moscow in regional structure of “TEREMOK” network distribution on the territory of RF reached **%, Moscow Region (**%). In Saint Petersburg more than half of all network outlets are located. Today «TEREMOK» is represented in three formats: street stands, fixed-side cafes and trade centers food courts.



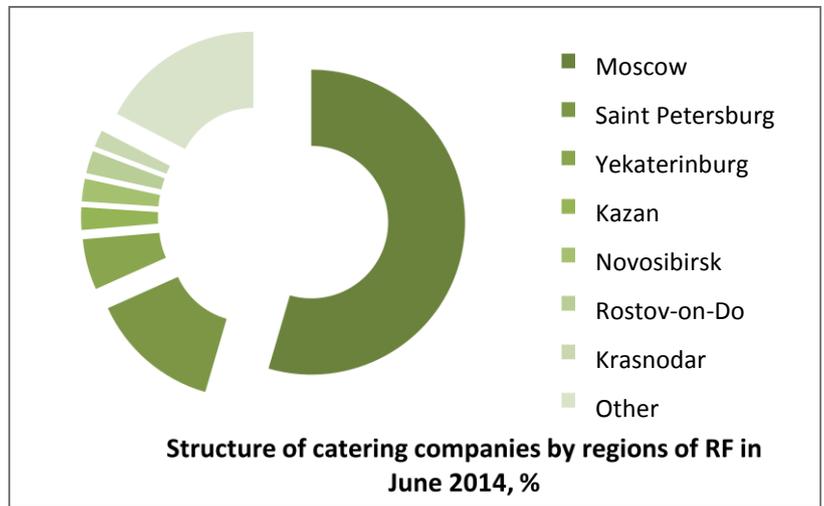
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RUSSIAN CATERING MARKET

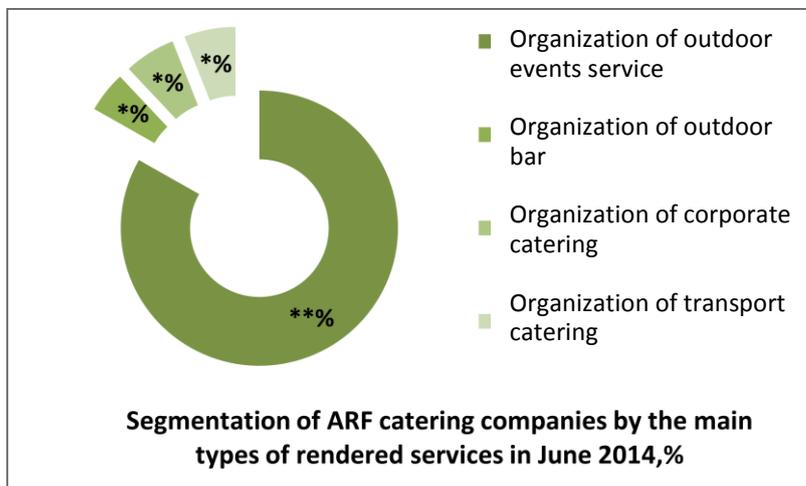
Geography of catering market of the Russian Federation is rather wide, where number of regions with enterprises in the declared segment of public catering market function, include: Moscow and Saint Petersburg (with shares in total number of companies - ** and **% respectively), Distribution is influenced, certainly, by number of consumers, as at present, and possible in the long term. What is also important, how often large cultural, sporting or political events demanding a large number of the service personnel and individually developed holding plan takes place in the city (menu, registration, entertainment program). For example, Summer University games of 2013 in Kazan, Winter Olympic Games in Sochi in 2014, etc.

By 2014 the main specialization of catering companies functioning on the Russian public catering market and service is organization of

events (buffet receptions, banquets, buffets, barbecue, etc.) or event catering. This type of activity is carried out by **% of the companies working in the catering segment in the Russian Federation reflects



how narrowly this business is developed in the country.



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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.

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