



**Intesco
Research
Group**

RETAIL AND RUSSIAN RETAIL MARKET



MOSCOW 2014

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“Hyperglobus” LLC (Globus)

“Zelgross” LLC (REWE Group)

Billa (REWE Group) LLC

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X5 Retail Group

“Magnit” JSC

“O`KEY” LLC

“Lenta” LLC

“DIXI Group” JSC

“Victoria” GC (sold)

“Sedmoy Continent” JSC

“Gorodskoy supermarket” LLC

“Novy Impuls – 50” LLC

“T and K Producty” JSC

Trade center “Enka” LLC

“Avoska-dva” LLC

“Mosmart” JSC

“Chain of self-service stores “Aliye Parusa” LLC

“Element-Trade” LLC

“Grinn” corporation

“Holiday” GC

“Mariya-Ra” LLC

“Noviye torgoviye sistemy” JSC

“Wester” GC

“Supermarket “Kirovsky” JSC

“Sistema regionMart” LLC

“Sibirsky gigant” LLC

“TH «Intertorg” LLC

“Lyubavushka” LLC

“Evropa” LLC

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“ORT “Universam” JSC
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“Matritsa-Holding” JSC
“Salut-Torg” LLC
“Bahetle-1” LLC
“Optovik” LLC
“Kazansky trade house” JSC
“Intertorg” LLC
“Center restrukturizatsii” LLC
“Aikai” LLC
“Duplet” LLC
“Radezh” LLC
“Gulliver” JSC
“Shad” LLC
“MAN” LLC
“Pallada torg” JSC
“TVK” LLC
“Trading network Solnechny krug” LLC
“Ostap” GC
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ABOUT INTESCO RESEARCH GROUP

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

WORLD MARKET OF RETAIL TRADE

DEVELOPMENT OF RETAIL TRADE IN RUSSIA

TURNOVER OF RUSSIAN RETAIL MARKET

COMMODITY STOCK

IMPORT SHARE

SEGMENTS OF RETAIL TRADE

RETAILING ENTERPRISES

LARGEST RETAILERS

MAIN TRADING NETWORKS OF FMCG

HOUSE TRADEMARKS 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

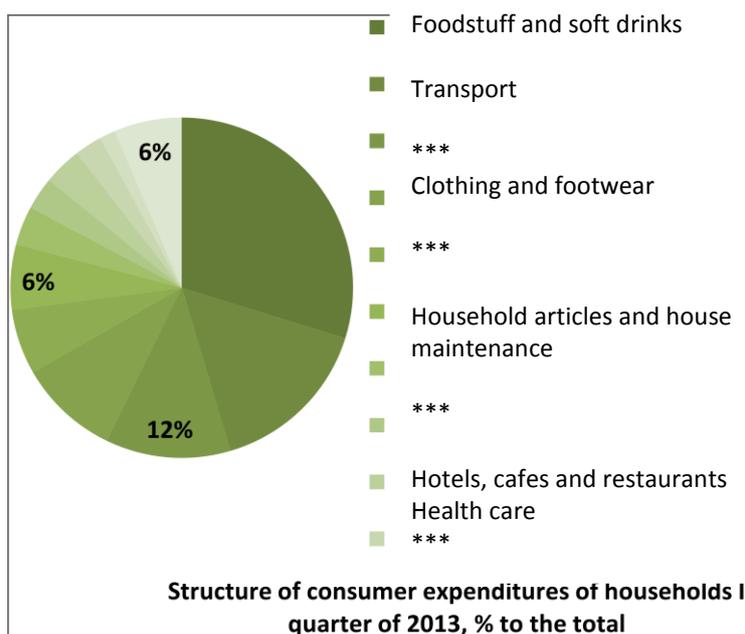
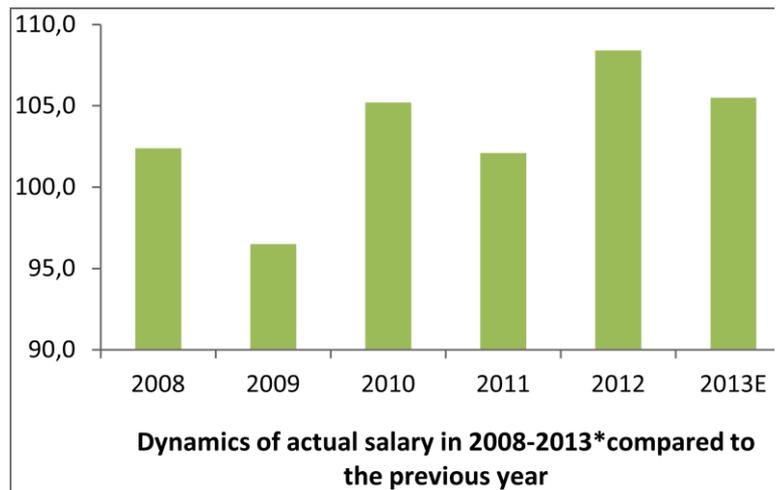
The research contains 69 schedules, 70 diagrams, 16 tables, 1 scheme

EXTRACTS FROM RESEARCH

CHAPTER 4

DEVELOPMENT OF RETAILING IN RUSSIA

Actual salary has been increasing through the period of 2008-2013 at slower rates. The minimal growth for the surveyed period was marked in 2009, when the actual salary decreased by **%. On the background of low base parameter of the following year was high enough – **%. The maximal increase of **% was marked in 2012. In the nearest time experts expect an increase of actual salary of **-%.



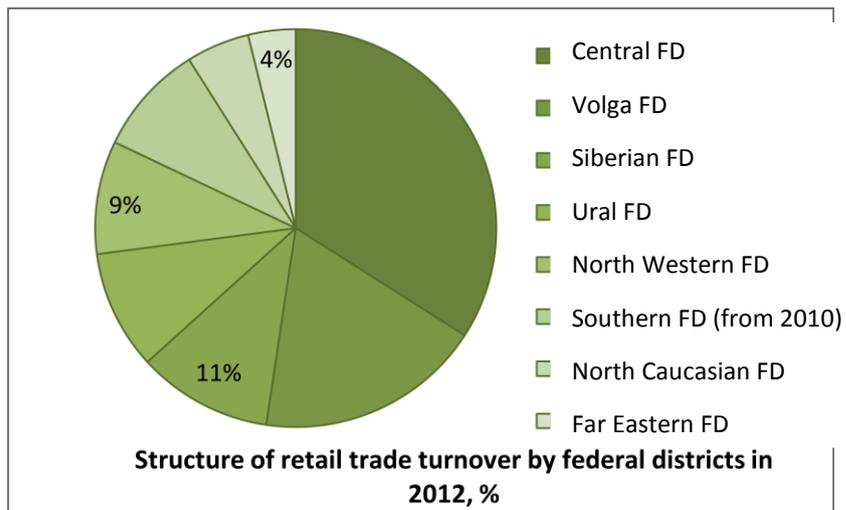
Almost one third (**%) of household consumption expenditures in the first quarter of 2013 belonged to food and soft drinks.. The next expenditure category was transport, which had **% of total expenditures. Household housing services had 11,5%, ,6% - clothes and footwear.

CHAPTER 5

TURNOVER OF RUSSIAN RETAIL MARKET

The consequence of the gradual recovery of consumer demand was an increase of retail trade.

Since 2007 retailing turnover increased almost two times (from *** trl rubles to *** trl rubles). The maximal rate of growth was marked in 2008 and amounted to **%. In retail trade turnover in Russia reached almost ** trl rubles. In 2012 rate of growth slowed down to **%, the turnover reached ** trl rubles. During January-July 2013 retail trade turnover amounted to ** trl rubles.



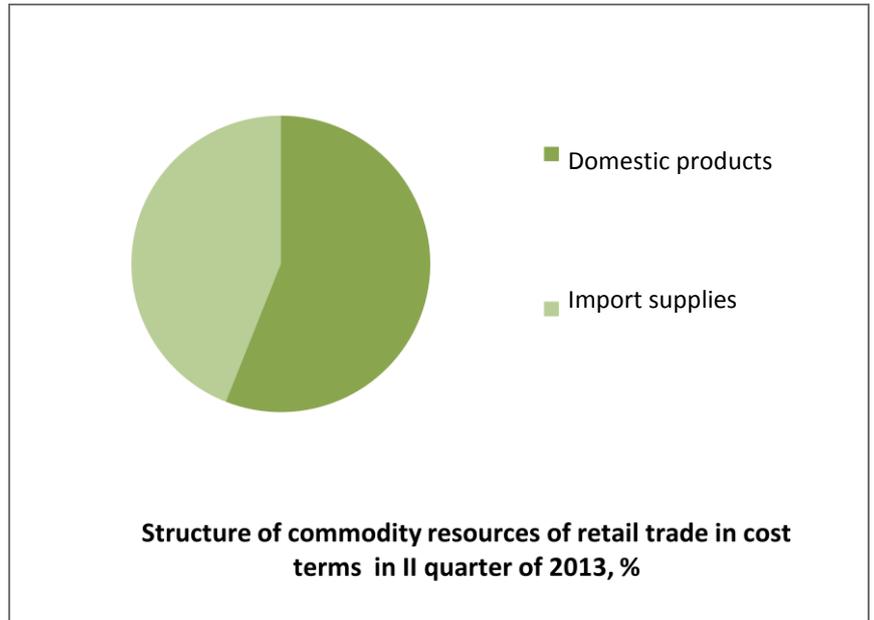
In 2011 Central FD had **% of retail trade turnover. Volga FD ranked second with two times less share – 18%. The share of Far Eastern FD was the least – 4%.

CHAPTER 7

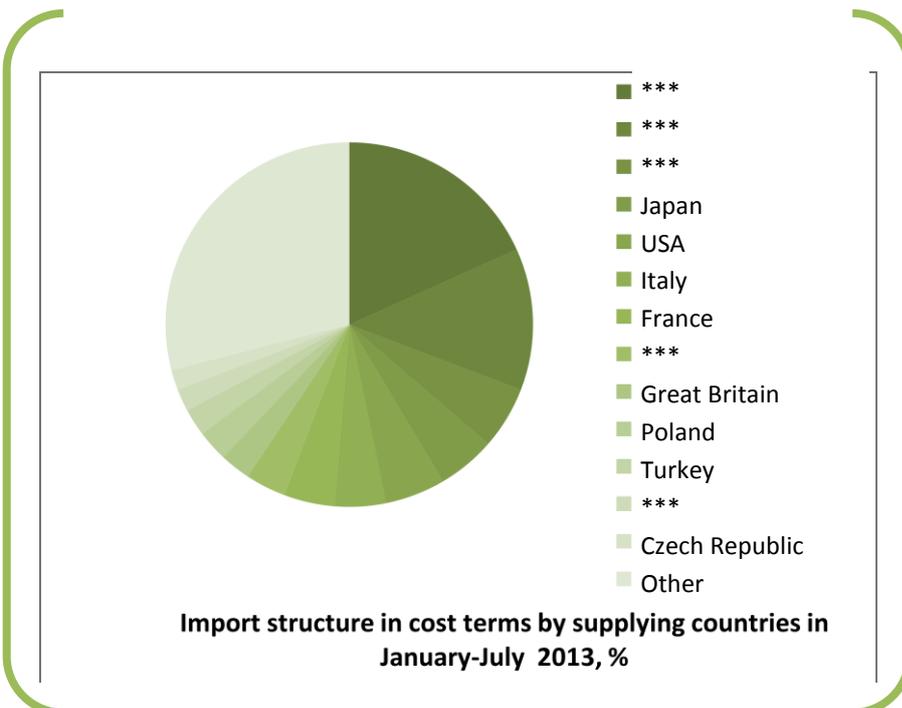
SHARE OF IMPORT

Russian retail trade in II quarter of 2013 was provided with ***% of domestic products.

The largest share of imported products in 2012 was marked in the following commodity groups: *** (47,8%), milk and dry cream (**%), animal oil (**%), a and poultry and meat (**%). We should mark that the share of imported meat during last two years decreases.



In January-July 2013 the share of ** was equal to 18% of imported products in cost terms. 13% were imported by **, shares of other countries amounted to less.



LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

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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 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.

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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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