

**Intesco
Research
Group**

FOOTWEAR RETAILING AND RUSSIAN MARKET OF FOOTWEAR RETAILING



MOSCOW 2012

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*Lamoda.ru**Sapato.ru*

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RESEARCH METHODOLOGY

Subject of research:

FOOTWEAR MARKET AND FOOTWEAR RETAIL NETWORKS

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2014

Regions of research:

RUSSIA

REGIONS OF RUSSIA

Main blocks of research:

GENERAL ECONOMIC SITUATION IN RUSSIA

SUBJECT OF RESEARCH

RETAIL SALES OF LEATHER FOOTWEAR

THE LARGEST PLAYERS OF FOOTWEAR RETAIL

MARKET OF FOOTWEAR INTERNET TRADE

TRENDS ON THE RUSSIAN MARKET OF FOOTWEAR RETAIL SALES

FORECAST OF FOOTWEAR SALES DEVELOPMENT

The largest Russian companies for which profiles are made:

Joint stock Company «Trading Company «TsentrObuv»»

Limited liability Company «Econica-Obuv»

Group of companies «Obuv Rossii»

Joint stock Company «Footwear Company «Unichel»»

Limited liability Company «Selling house «Spartak»»

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

Ministry of economic development of the Russian Federation

Federal Customs Service

Federal Tax Service

International bases of statistics

Field expert evaluations

Retail sale reports

Materials of the field's main players

Field print and electronic publications

The research contains 20 schedules, 7 diagrams, 26 tables.

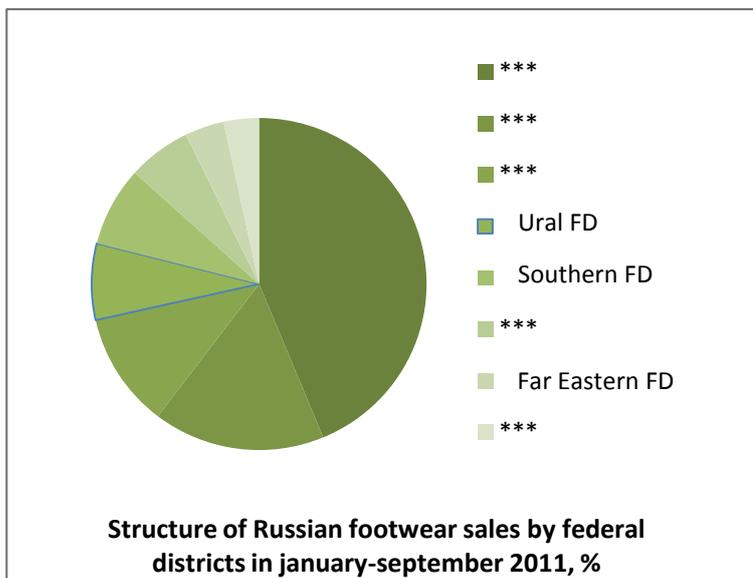
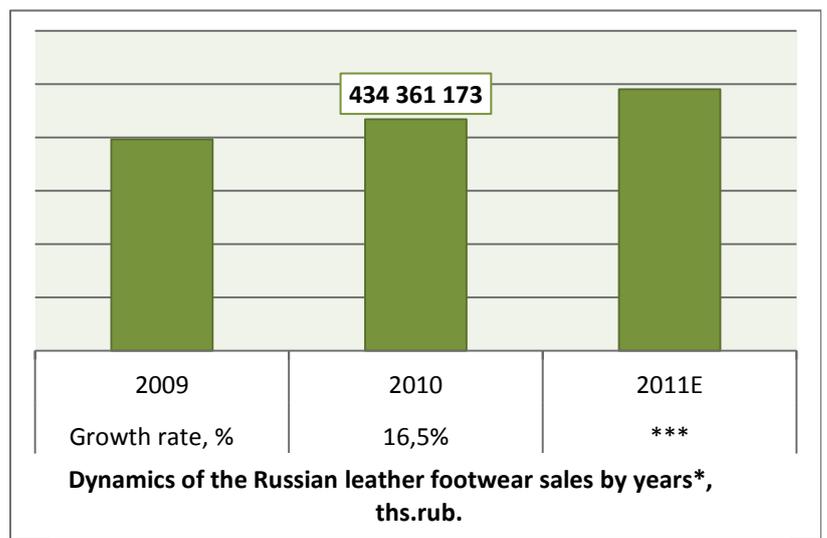
EXTRACTS FROM RESEARCH

CHAPTER 3

RETAIL SALES OF LEATHER FOOTWEAR

In 2011 retail sales of leather footwear were more than *** billion rubles in Russia. It's 10 % more than in 2010. Growth of footwear sales corresponded to the general tendencies of retail increase, caused by *** and ***.

In dynamics of footwear sales by quarters the general tendency is traced: the sales were minimal in *** quarter. It was caused both by *** and *** influencing cost retail sales. Then sales increased within a year. Ultimate sales were achieved in *** quarter when there was demand on ***.



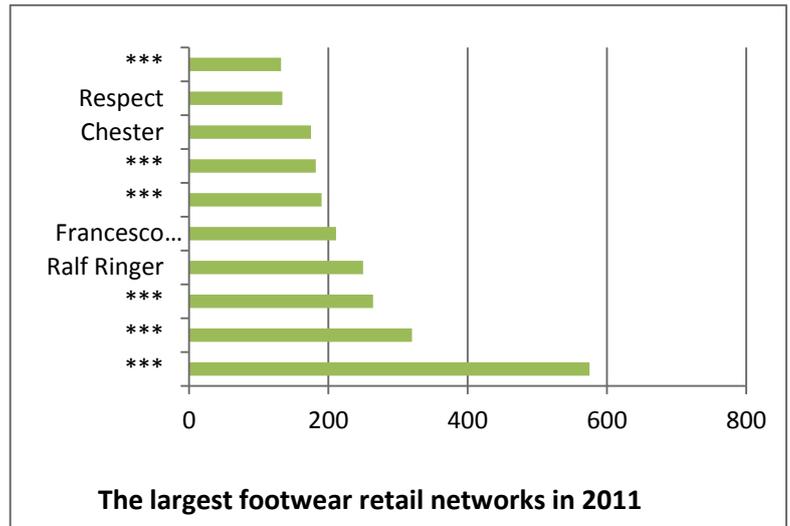
In the first three quarters of 2011 *** federal district concentrated nearly a half of whole retail sales. Dominance of one district can be explained by ***. In the Central district main part of retail sales (*** %) is provided by Moscow. The second place was occupied by *** district where sales made *** % of total amount.

CHAPTER 4

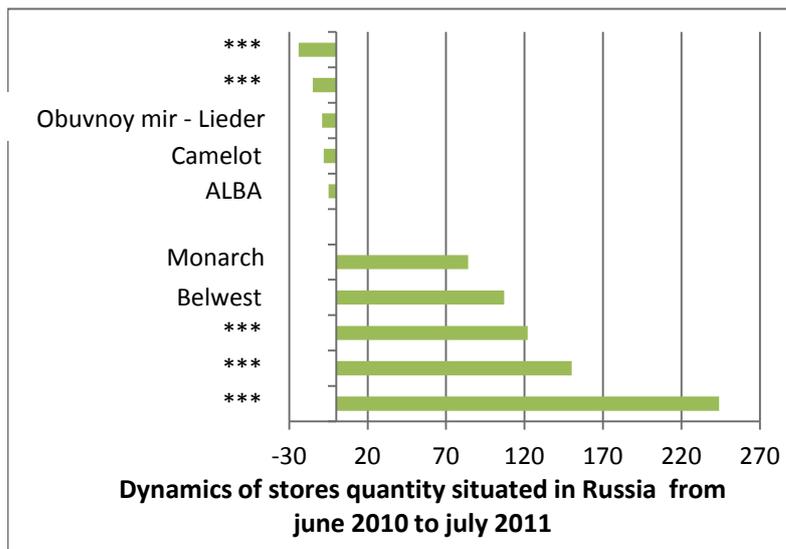
THE LARGEST PLAYERS OF RETAIL FOOTWEAR

Following the results of 2011 the Tsentrobuv company had the widest retail network - 575 outlets. It is followed by «Unichel» - 320 shops. The third place was taken by «Ecco» - 264 stores.

Last year «***» was the fastest growing - *** new stores were opened during this period. It is followed by «***» company – they opened *** stores. Third place is taken by «***» with *** stores opened in 2011.



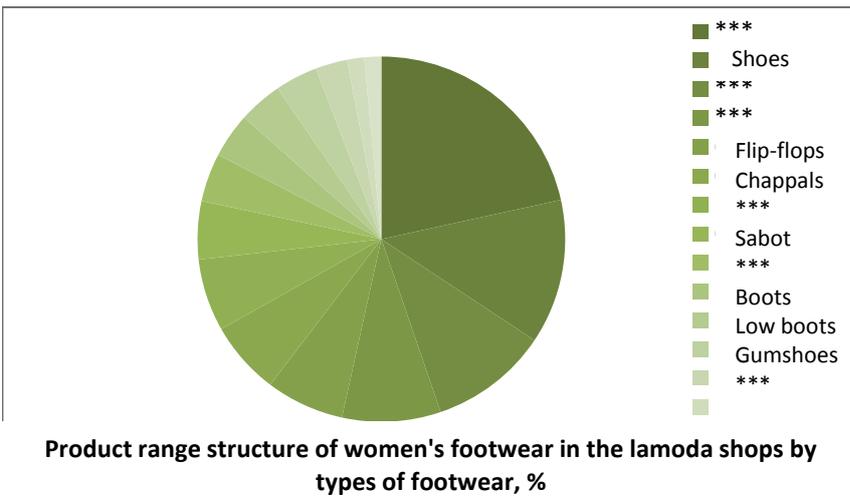
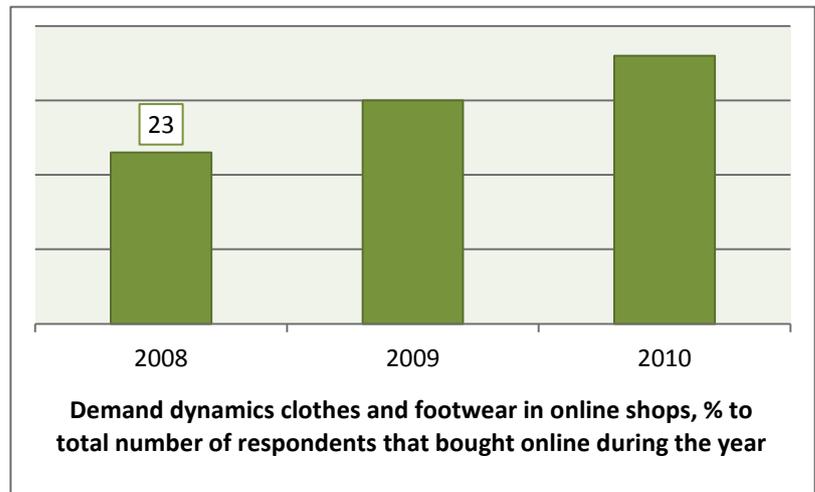
At the same time «***» network diminished: *** shops were closed in 2011 – almost one fifth of total number. «***» shut down 15 stores. «Obuvnoy mir-Lieder» closed *** stores.



CHAPTER 5

MARKET OF FOOTWEAR
INTERNET TRADE

Clothes and footwear – one of the most demanded categories of online sales, their customers *** % of all Internet users. And this segment has a high growth potential because online sales remain unusual for Russian customers, however every year more and more users start to explore this service.



Now in stock of one of the largest online footwear sellers prevail *** - *** % and shoes - *** %.

As for summer shoes 9% is for *** and *** compose ***%.

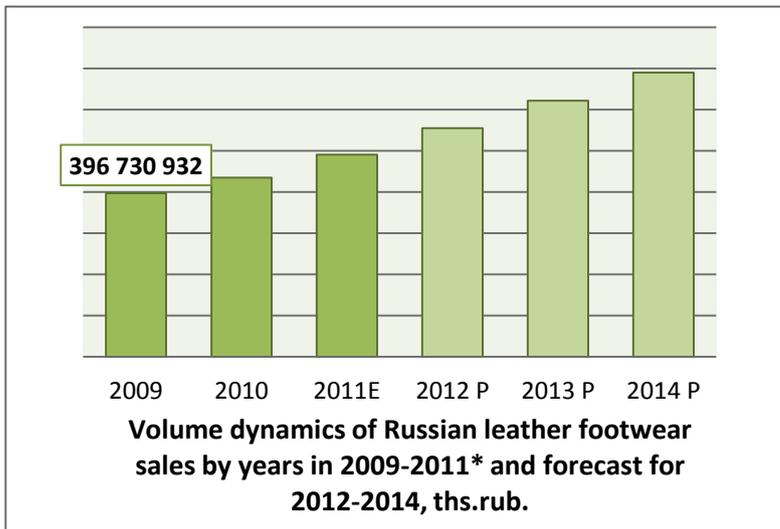
Large Internet shops peculiarity is that, despite obvious seasonality of the goods,

it is possible to find off-seasonal footwear (both of last season and some new models)

CHAPTER 7

**FORECAST OF FOOTWEAR
RETAIL DEVELOPMENT IN
RUSSIA**

Demand on footwear retail depends, first of all, on *** and secondly on ***. Reduction of the first figure influences demand structure: *** decreases, their customers switch to ***. In addition, the number of spontaneous purchases and total amount of sales in physical terms decreases. Decrease of *** reduces number of potential consumers and, therefore, sales.



In 2012-2014 experts predict real income increase to the level of *** % that will favorably affect footwear retail.

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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 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
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