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Periodic review of industry

Rating of FMCG retailers in Russia

November 2010

Demo-version

- Statistical data on retail trade in Russia and regions
- Changing the main indicators of retail trade in Russia
- Review of developments in the retail market of Russia, took place in November 2010
- Rating of FMCG retailers by the number of stores, selling area in November 2010 and revenues in 2009

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Introduction

The branch survey **The Rating of FMCG retail chain Of Russia** contains information about the development of the retail trade, as well as the overview of events that took place at the Russian retail market during the period under review (for the present survey this is November 2010), the information related to the results of operating, financial and investment activities of FMCG chains in Russia, as well as **the rating of 70 largest FMCG retail chains of Russia**.

The survey is prepared on the basis of integrated set of data sources:

- Regular monthly polling of more than 100 retail chains of Russia by the experts of INFOLine IA;
- Materials from MSM (printed press, electronic MSM, federal and regional information agencies);
- Information materials of the retail chains and supplying companies (press-releases, Web-site content, yearly and quarterly statements, trade literature regarding the securities issue and investment memorandums);
- Financial statements of the chains according to international standards (audited and managerial);

At the present time a large variety of specialist in Russia require immediate and true-to-life coverage of events at the Russian retail market:

- Top-managers, the specialist of marketing and sale department of companies that produce consumer goods;
- Top-managers, the specialist of marketing and retail chains development departments;
- The specialists of sale departments of companies that produce goods for retail trade and offer services for various trade chains.
- Private and institutional investors, which own or are planning to acquire the assets in Russian retail chain trade.

The principal objective of The Rating of FMCG retail chains in Russia is to satisfy the demand for immediate, statistical and analytical information regarding the Russian retail trade market and FMCG chains for the specialists of the above-mentioned specializations. To be able to receive the forthcoming issues of the survey, please, **forward a request to** INFOLine IA, E-mail: mail@advis.ru or by fax + 7 495 772 76 40 (+7 812 322 68 48) and **conclude a contract for our information services**.

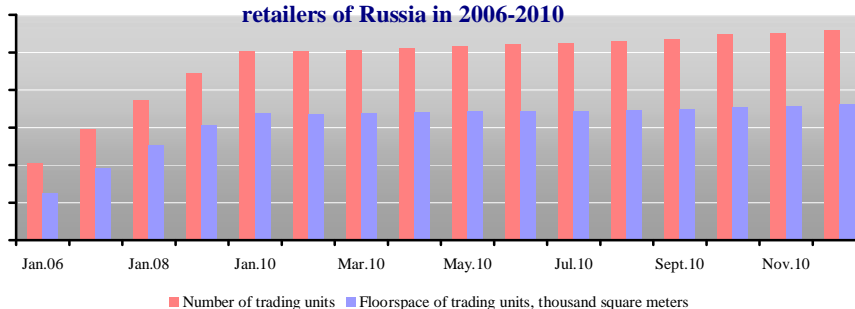
Rating of FMCG retailers in Russia

Performance results of TOP 70 FMCG chains

Performance results of TOP 70 FMCG chains in Russia

In 2009 the development of the trading units of the largest retail chains in Russia demonstrated positive dynamics as compared to 2006-2008.

Dynamics of number of trading units and their floorspace of 70 largest retailers of Russia in 2006-2010



The growth in number of trading units among TOP70 FMCG retailers in November of 2010 was ** units, during January-November 2010 –**units; the growth of total trading floorspace was over ** thousand square meters, and during January-November 2010 – more than ** thousand square meters.

The total number of stores among TOP 70 FMCG retailers as of 01 December 2010 was**, with total trading floorspace of ** thousand square meters.

Development of hypermarket format¹

<...>

The total number of hypermarkets among TOP 70 FMCG retailers as of 01 December 2010 was**, with total trading floorspace of ** thousand square meters.

<...>

Demo-version

The full text of the section contains a description of the operating results of November 2010 by TOP-70 Russian commercial networks, including operating results by format hypermarket, supermarket, discount stores

The rating of FMCG retail chains of Russia in terms of number of stores

*INFOLine IA has been monitoring the dynamics of commissioning of FMCG stores since 2006. At the present time we **monthly** receive the data regarding the number of stores dynamics for 72 largest FMCG retailers of Russia (since January 2010 the number of monitored retailers increased by 20).*

The dynamics of number of trading units among the largest retailers

The dynamics of number of stores of the largest retailers for the period of 2005-2010 is represented in the table below (please, take note, the data from polling and questionnaire surveys conducted in 2009 has been revised).

Number of stores of the largest FMCG chains during 2005-2010 as of the end of the period, (units)

Legal name	Brand	Main formats ²	2005	2006	2007	2008	2009	Number of stores 1st quarter 2010	Number of stores 2nd quarter 2010	Number of stores 3rd quarter 2010	Number of stores, November 2010	Dynamics for November
X5 Retail Group N.V.	Pyaterochka	D	326	451	674	848	1039	1063	1135	1232	-	-
	Perekrestok	S	120	168	194	207	275	276	275	289	-	-
	Karusel	H	6	19	22	46	58	60	62	65	-	-
	Perekrestok-Express, Pyaterochka- Express	M	0	0	0	0	0	42	42	44	-	-
...	

Data source: according to the companies' data

¹ Hereinafter the data for X5 Retail Group and Magnit is presented as it was available for the date of this survey's preparation

² Legend: D - discounter, H - hypermarket, S - Supermarket, M – convenience store

The rating of FMCG retail chains of Russia in terms of trading floorspace

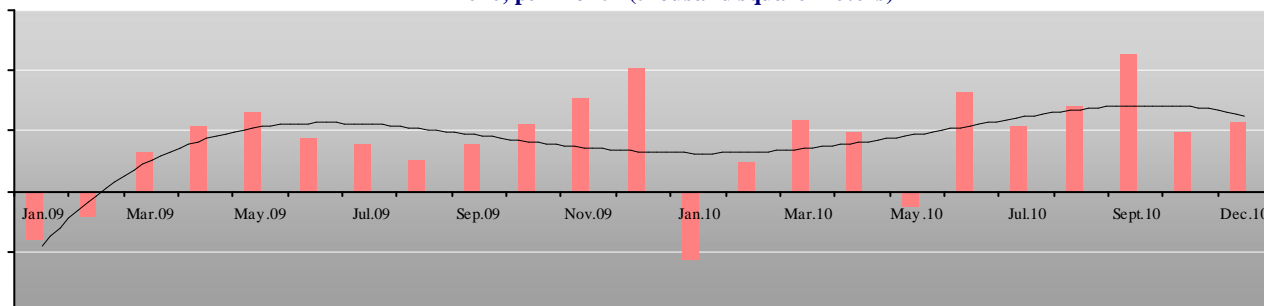
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The results of January-November 2010

An important feature of 2010 was the closing of retail facilities within the business optimization. In spring 2010 was closed all stores of retail chain Carrefour in Russia and the summer of 2010 ended the existence retailers Alpi and Borodino-Agro. Next important trend is the activity in the market M&A: since the September-December was done 3 important transaction - buying trade chain Semeynaya kopilka in Tula region by retailer Victoria, buying X5 Retail Group trading chains Island in Moscow and one of the largest players in the FMCG retail sector in Russia, trading chain Kopeika, allowing to retailer strengthen its market position. The deal X5 Retail Group with Kopeika helped much X5 to get ahead in the fight for the championship with a trading chain Magnit, a growth of retail space which up to 2010 can be more * sq m.

During January-November 2010 the growth of retail space in 70 major chains reached more than 56 thousand sq.m. In November 2010 17 of the largest chains increased their trading floorspace by * thousand sq. m. The floorspace growth was provided by commissioning of hypermarkets of Magnit, Palata, Metro C&C, Lenta, Selgros, Essen, Karusel, as well as supermarkets of O'Key, Victoria, Atac, Vivat, Bahetle, Spar and Azbuka Vkusa. Besides, a number of discounter and convenience store format trading units were opened by Magnit, Diksi, Kopeika, Maria-Ra, Holiday, Narodnaya 7Ya, Kvartal, Monetka, Pyaterochka, Aniks and others. The dynamics of monthly floorspace growth for 70 largest chains is represented in the diagram below³.

Dynamics of net trading floorspace growth of 50 (since 2010 - 70) largest retailers of Russia in 2009-2010, per month (thousand square meters)



<...>

The dynamics of trading floorspace of the largest retailers

The dynamics of trading floorspace of the largest retailers for the period of 2005-2010 are represented in the table below (please, take note, the data from polling and questionnaire surveys conducted in 2009 has been revised).

Total trading floorspace of the largest FMCG chains of Russia during 2005-2010 as of the end of the period, thousand square meters

Legal name	Brand	Main formats ⁴	2005	2006	2007	2008	2009	Trading floorspace, 1 st quarter 2010	Trading floorspace, 2 nd quarter 2010	Trading floorspace, 3 rd quarter 2010	Trading floorspace, November 2010	Dynamics in November
X5 Retail Group N.V.	Pyaterochka	D	196,3	257,4	357,5	419,2	493,0	497,7	516,5	543,6	-	→
	Perekrestok	S	140,7	208,7	251,7	222,4	284,4	287,8	286,9	300,2	-	→
	Karusel	H	34,4	109,0	126,0	232,5	285,6	299,3	310,9	324,1	-	→
	Perekrestok-Express, Pyaterochka- Express	M	0,0	0,0	0,0	0,0	0,0	8,6	8,6	8,9	-	→
...

Data source INFOLine IA ,according to the companies' data

³ The floorspace growth for Pyaterochka and Perekrestok X5 Retail Group during the first quarter is included into the figures of March 2010, the floorspace growth for Pyaterochka and Perekrestok X5 Retail Group during the second quarter is included into the figures of June 2010 (in connection with the retailer's policy for information disclosure), the floorspace growth during intermediate months does not include commissioning of new trade unit of X5 Retail Group and Magnit Магнит in connection with the retailer's policy for information disclosure.

⁴ Legend: D - discounter, H - hypermarket, S - Supermarket, M - convenience store



The rating of FMCG retail chains of Russia in terms of net sales

The year of 2009 turned out to be extremely complicated for Russian retailers. For instance, the majority of regional chains decreased their sales even in roubles terms and only a comparatively small number of them demonstrated moderate sales growth.

Sales dynamics of the largest retailers

Sales dynamics of in the third quarter, 9 month and 10 month of 2010 are represented in the table below.

Dynamics of net sales (without VAT) of the largest FMCG chains in 2010, billion rubles

Legal name	Brand	Main formats 5	Data	Net sales, 3 rd quarter 2010	3 rd quarter 2010 up 3 rd quarter 2009, %	LFL in 3 rd quarter 2010, %	Net sales, 9 month 2010	9 month 2010 up 9 month 2009, %	LFL6, 9 month 2010, %	Net sales, 10 month 2010	10 month 2010 up 10 month 2009, %
X5 Retail Group N.V.	Pyaterochka	D	IFS	45,11	25	10	132,58	26	12	-	-
	Perekrestok	S	IFS	19,82	20	2	58,2	9	4	-	-
	Karusel	H	IFS	14,14	8	-3	42,97	13	-1	-	-
	Perekrestok-Express, Pyaterochka- Express	M	IFS	0,59	-	-	1,17	-	-	-	-
	Total Company	D,S,H, M	IFS	79,8	21	6	235,33	20	5	-	-
...	

Data source: according to the companies' data

Dynamics of net sales (without VAT) of the largest FMCG chains in 2010, billion rubles

Legal name	Brand	Main formats ⁷	Data	2005	2006	2007	2008	2009
X5 Retail Group N.V.	Pyaterochka	D	IFS	38,32	53,63	75,38	110,95	148,35
	Perekrestok	S	IFS	28,72	40,66	49,75	67,15	73,19
	Karusel	H	IFS	2,39	9,8	31,16	41,71	53,55
	Perekrestok-Express, Pyaterochka-Express	M	IFS	44,53	68,1	94,04	132,4	169,86

Data source INFOline IA data

Demo-version

The full text of the section contains rankings of trading networks of the Russian Federation on the number of shopping centers and largest trade areas (operational data) as well as in terms of revenue (in 2009). In addition, the rating of networks of retail space complemented by a description of the results of 2009, January-November 2010 and forecast for 2010.

⁵ Legend: D - discounter, H - hypermarket, S - Supermarket, M - convenience store

⁶ LFL in rubles

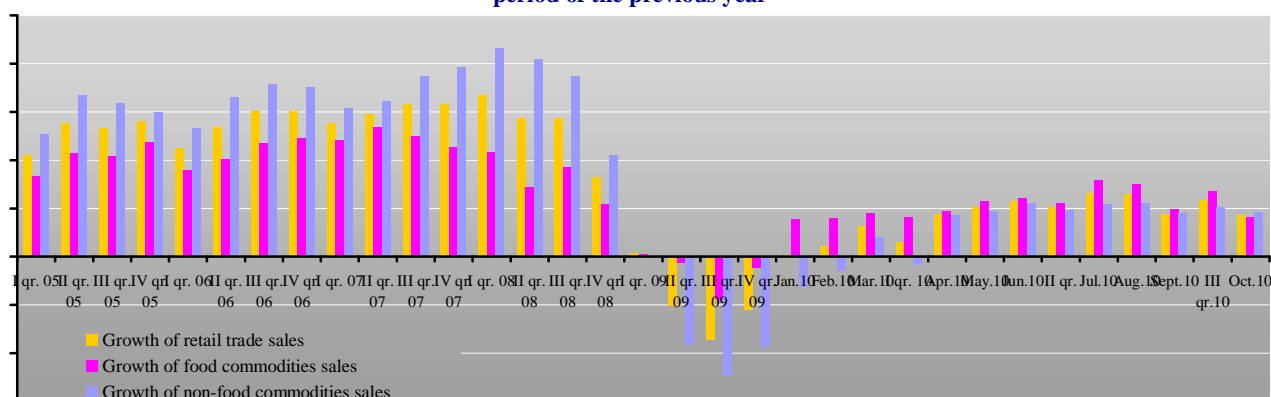
⁷ Legend: D - discounter, H - hypermarket, S - Supermarket, M - convenience store

Section I. Development of retail trade in Russia

Macroeconomical figures of the retail trade

The retail trade sales volume in 2009 amounted to 14 602.5 billion rubles, which, in terms of commodities mass was 95.1% against the figures of 2008. In October 2010 trade sales volume was * billion rubles, which was **% as compared to October 2009. During January-October 2010 the retail sales volume was * billion rubles, which is by **% more than for similar period of the past. In comparison with September 2010 the September figures demonstrated decrease in consumption of commodities, both food and non-food ones. September sales went up as compared to September by **% (in 2009 the October sales against September increased by **%). At the same time the retail trade sales volumes for food commodities in October 2010 against September 2010 were **%, for non-food commodities – **%.

Dynamics of the main figures of the consumer market in 2005-2010, in % as to the corresponding period of the previous year



<...>

State regulation of retail trade

November 9, 2010 published decision of the Government of the Russian Federation "On approval of rules establishing minimum standards for security of the population area retail facilities". In accordance with the document standards developed by the authorized bodies of executive power of the Russian Federation and considered when developing planning documents, master plans, regional and municipal development programs, trade, and layouts of non-stationary commercial properties.

<...>

More detailed information can be obtained by directing a request to receive **Analytical Report**.

In **December 2010** the specialists of INFOLine IA company released the updated version of **Analytical Report On the Draft of the Act On Principles of State Trade Regulation in RF**, in which they deliver comprehensive information regarding the issues of state regulation of retail trade of RF, including scale analyses of retail trade regulation in Russia and the world, the main provisions of The Federal Act On Principles of State Trade Regulation in RF, its impact on the interactions between suppliers and trading chains, status of readiness of subordinate regulations for The Federal Act On Principles of State Trade Regulation in RF.

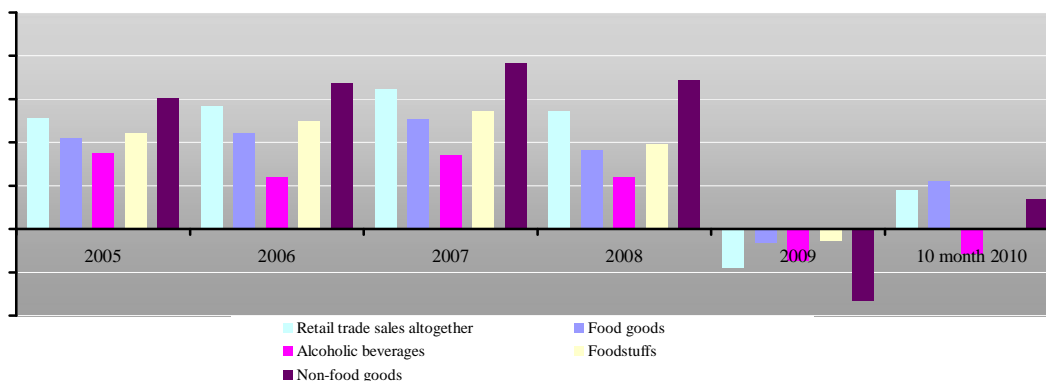
Know the conditions **get** product you can have Feshchenko Darya (mail@infoline.spb.ru), tel/fax 007-812- 322-6848; tel/fax 007-495-772-7640, extension 142.



The structure of retail sales by the categories of goods

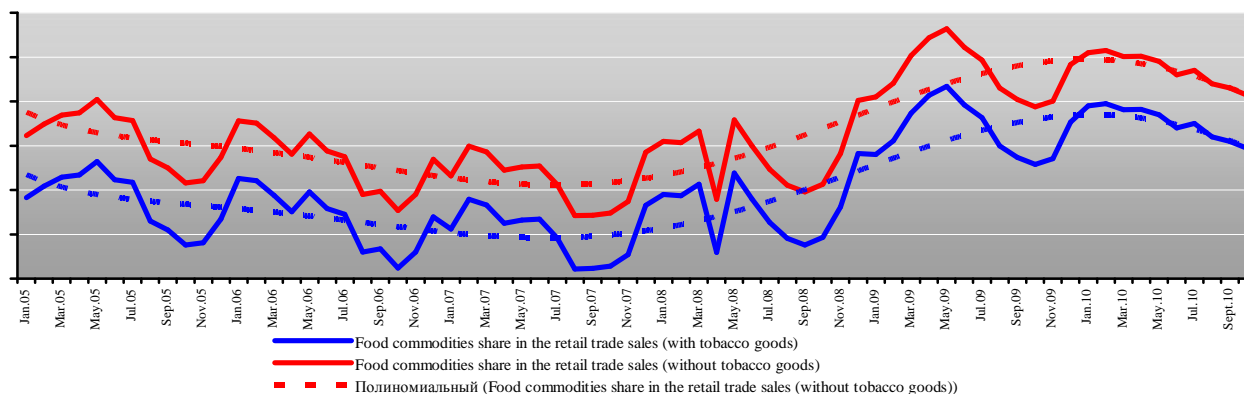
The long-term dynamics and structure of retail sales by the categories of goods is represented in the diagram below.

Dynamics of retail trade sales according to the categories of goods in 2005-2010, %



The graph represents the dynamics of food commodities share (with and without tobacco goods).

Dynamics of food commodities share in the retail trade sales in 2005-2010, %



For the 9 months of 2010 the highest growth of retail sales was demonstrated by the following goods: vegetable oils, fruit, and eggs. The sales of sugar grew lower.

<...>

The structure of retail sales by the categories of trading units

In October 2010 *% of the retail sales were shaped by trading organizations and individual entrepreneurs, which were operating outside the marketplaces. The share of retail marketplaces and fairs was *% (in October 2009 –*% and *% respectively).

The sales of trading organizations and marketplaces in 2002-2010, billion rubles

Category	2002	2003	2004	2005	2006	2007	2008	2009	Jan. 2010	Feb. 2010	March 2010	Apr. 2010	May 2010	June 2010	July 2010	Aug. 2010	Sept. 2010	Oct. 2010
Retail sales	3765	4529	5642	7038	8690	10866,2	13853,2	14602,5	1192,2	1162,5	1266,4	1277,8	1314	1333,1	1378,4	1410	1402,6	1457,3
The sales of trading organizations	2838,8	3451,1	4420,5	5558,2	6987	9214,5	12015,9	12610,3	1031,3	1005,6	1106,8	1118,1	1151,1	1167,8	1208,9	1232,3	1220,3	1268,6
Sales at marketplaces	926,2	1077,9	1254,1	1479,8	1703	1651,7	1837,3	1992,2	139,2	135,8	139,5	139,8	142,7	144,8	148,7	155,3	182,3	188,7
Share of trading organizations, %	75,4	76,2	77,9	79,0	80,4	84,8	86,7	86,4	86,5	86,5	87,4	87,5	87,6	87,6	87,7	87,4	87,0	87,1
Share of marketplaces, %	24,6	23,8	22,1	21,0	19,6	15,2	13,3	13,6	13,5	13,5	12,6	12,5	12,4	12,4	12,3	12,6	13,0	12,9

Data source FSGS data

<...>

Demo-version

The full text of the section include: macroeconomic indicators of retail trade (turnover in general, food and nonfood items), describes the structure of retail trade turnover (by product category, by type of trade organizations, by region), analysis of revenues and expenses, as well as consumer expectations and confidence of the population, the case of inflation at the food commodities

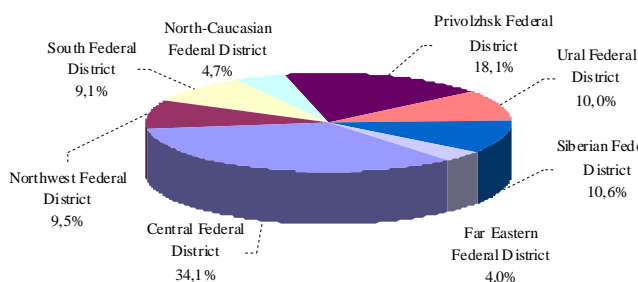
market. The "State regulation of retail" contains timely information on the "Trade Act" (by-laws, the results of working group meetings, etc.).

Sample of the full text of one of the sections below.

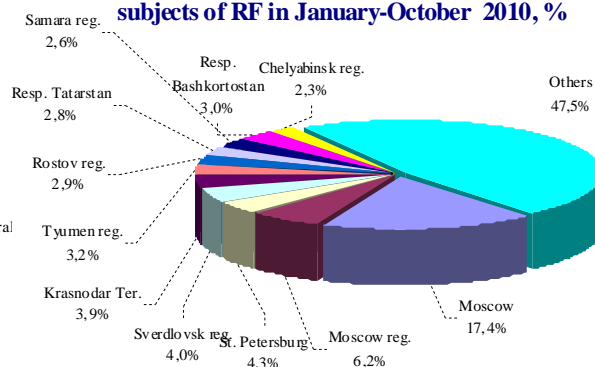
Regional structure of retail sales

Regional structure of retail sales features irregularity: 52.46% of the retail sales in October 2010 fall on 11 territorial subjects of Russian Federation.

Structure of retail sales according to federal districts of RF in January-October 2010, %

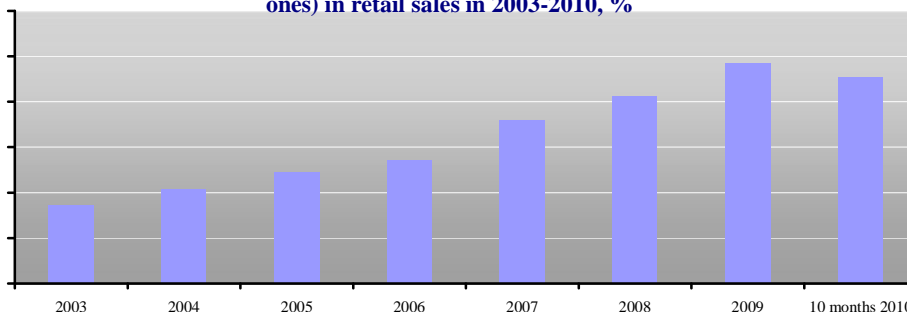


Structure of retail sales according to territorial subjects of RF in January-October 2010, %



The share of other regional areas (except the 11 largest) was constantly growing during 2003-2009 and only as recently as with the beginning of recession, in the first-third quarters of 2010 for the first time during last 10 years it demonstrated decrease, determined by faster than at the average over the territory of Russia restoration of consumer demand in Moscow, Sverdlovsk region and republics of Bashkortostan and Tatarstan.

Dynamics of the share of 69 regional areas of Russia (without 11 largest ones) in retail sales in 2003-2010, %



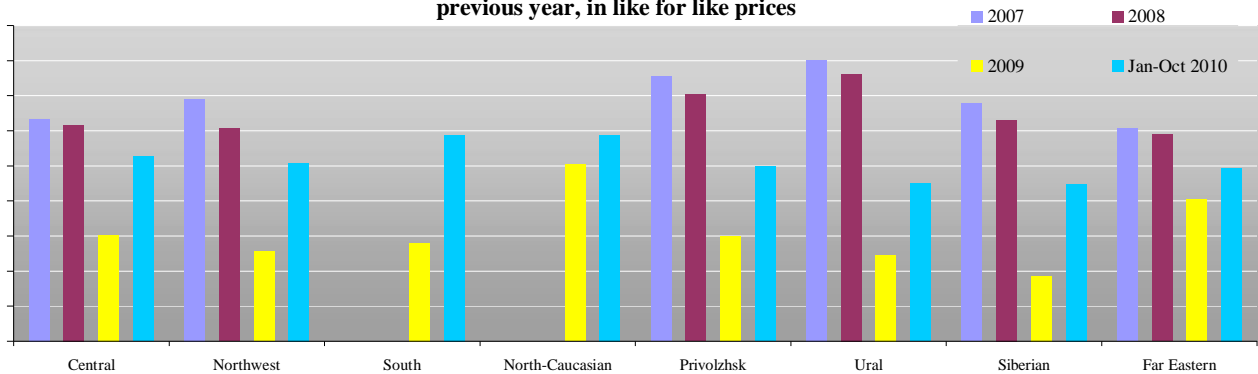
Regional structure of retail sales of Russian Federation in 2003-2010, %

Regional area	2003	2004	2005	2006	2007	2008	2009	10 month 2010
Central Federal District	39,2	38,4	36,9	35,8	34,7	33,5	33,7	34,1
Moscow region	4,3	5,1	5,3	5,7	6,1	6,4	6,1	6,2
г. Moscow	26,0	24,3	22,5	20,9	19,0	17,1	17,3	17,4
Northwest Federal District	9,1	9,3	9,5	9,4	9,4	9,2	9,4	9,5
St. Petersburg	3,6	3,8	4,0	4,1	4,1	4,1	4,2	4,3
South Federal District	7,7	7,8	7,9	8,0	8,5	8,8	8,7	9,1
North-Caucasian Federal District	3,0	3,4	3,7	3,6	3,8	4,0	4,6	4,7
Privolzhsk Federal District	16,7	16,7	16,9	17,5	17,9	18,4	18,3	18,1
Ural Federal District	8,4	8,7	9,3	10,0	10,4	10,8	10,3	10,0
Siberian Federal District	11,7	11,6	11,7	11,7	11,5	11,6	10,9	10,6
Far Eastern Federal District	4,2	4,1	4,1	4,1	3,9	3,7	4,1	4,0

During January-October 2010 the steepest drop (over 5%) in volumes of retail sales as to the similar period of 2009 among the largest regional areas (with retail trade share in RF over 1%) was demonstrated by one territorial subject - Khanty-Mansi Autonomous (8.3%), the decrease within 5% limits was observed in Tyumen region- by 4.6%, Irkutsk region - by 3.0%, in Perm Territory - by 3.1%, in Chelyabinsk region - by 0.5%. The highest growth during the same period was demonstrated by Volgograd region

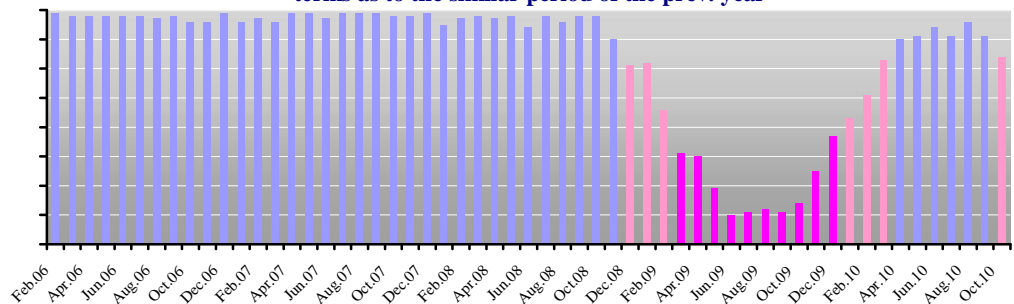
(by 12%), Sverdlovsk region (by 11.2%), Rostov region (by 10.7%) and Stavropol Territory (11.2%).

Growth of retail sales according to districts in 2007-2010, in % to the corresponding period of the previous year, in like for like prices



In the period 2001-2008, in most regions have seen a dramatic growth in retail turnover in physical terms, but within 10 months from March to December 2009, the dynamics in most of the region turned out to be negative. In this case, since November 2009, the number of regions in which the retail trade turnover is growing once again began to increase, reaching a peak August 2010 (76). However, since September, this index decreased and in October 2010 was 64 (dropping to the level of March 2010, in a period of crisis in the economy). Thus, we can conclude that the negative dynamics of the situation in retail trade in Russia at the regional level, despite the preservation of positive dynamics in comparison with 2009 in Russia as a whole.

Number of regional areas with positive dynamics of retail sales in physical terms as to the similar period of the prev. year



During January-October 2010 reduction in turnover compared to the same period in 2009 occurred in 13 regions. In the analysis took into account 80 Russian regions (excluding the Khanty-Mansiysk, Yamal-Nenets and Nenets Autonomous District), existing as of November 1, 2010 (data for earlier years restated for the consolidation, merger of regions, as well as name changes).

Section II. Events and development plans of FMCG retail chains

X5 Retail Group N.V. / Pyaterochka, Perekrestok, Karusel and Perekrestok-express trading chain



Company name: X5 Retail Group N.V. V. Address: 28, str.4, Srednyaya Kalitnikovskaya, Moscow, 109029. Phones: +7 495 6628888 +7 495 7899595 Fax: +7 495 6628888, +7 495 7899595 E-Mail: info@x5.ru Web: www.x5.ru. Chief executive: Lev Hasis, CEO of X5 Retail Group.

Chain development

As of 01 October 2010 X5 Retail Group is represented in 45 cities and towns of European Russia and Ural, as well as in Ukraine, and controls 1630 stores, with trading floorspace of 1176.72 thousand square meters. The chain includes 1232 Pyaterochka discounters, 44 Perekrestok-express convenience stores, 289 Perekrestok supermarkets and 65 Karusel hypermarkets. During the third quarter of 2010 X5 Retail Group increased its trading floorspace by 53.9 thousand square meters and the number of stores by 116, including 97 Pyaterochka discounters, 2 Perekrestok-express convenience stores, 14 Perekrestok supermarkets and 3 Karusel hypermarkets. As of 01 October 2010 the number of its franchising stores in Russia reached 632 units, including 593 Pyaterochka discounters, 20 Perekrestok-Express mini-markets and 19 Paterson supermarkets. <...>

The performance results and expectations

During the third quarter of 2010, according to unaudited records, the consolidated net profit of X5 Retail Group reached 79.8 billion rubles or 2.61 billion US dollars, increasing by 21% in rubles and by 24% in US dollars in comparison with similar period of 2009. During the 9 months of 2010 the gross profit of X5 Retail Group was 235.332 billion rubles or 7.78 billion US dollars, increasing by 20% in rubles and by 29% in US dollars in comparison with similar period of 2009. <...>

M&A

<...>

On 22 July 2010 X5 Retail Group filed a petition with FAS (Federal Antimonopoly Service) of Russia for purchase of 99.9% of shares of OAO Torgoviy Dom Kopeika and its subsidiaries. In September 2010 FAS adopted a resolution to satisfy the petition about the purchase of 99.99% voting shares of OAO Torgoviy Dom Kopeika by OOO Agrotorg (member of in X5 Retail Group). <...>

03 December 2010 the agreement for the purchase of Kopeika trading chain by X5 Retail Group was signed in London. As was reported by one of the parties of the deal, the sum of the purchase was about 1.65 billion US dollars (51.5 billion rubles). The sum includes the debts of Kopeika, which equal 400 million US dollars.

<...>

Auchan / Auchan and Atac trading chain

Auchan Ltd. / Auchan trading chain



Company name: Auchan, LTD. (Auchan trading chain) Address: 3 A, ul.Verhnyaya Krasnoselskaya, 107140, Moscow. Phones: +7 495 7212090, 7212099 Fax: +7 495 7211753 E-Mail: reception@auchan.ru Web: www.auchan.ru. Chief executive: Jean-Pier Jermen, CEO.

Chain development

As of 01 December 2010 Auchan Company controls 43 trading units in Russia. 27 Auchan hypermarkets operate in 11 regional areas (15 in Moscow and Moscow region, 3 in St. Petersburg, 2 in Rostov-on-Don, one in Adygeya, Samara, Krasnodar, Yekaterinburg, Nizhniy Novgorod, Novosibirsk, Omsk, and Voronezh). Besides, Auchan manages 12 Auchan-City mini-hypermarkets (they were launched as a result of Ramstor chain hypermarkets rebranding) in Moscow (7 stores), Yekaterinburg (1), Moscow region (2) and St. Petersburg (1). The chain also includes 2 stores of a new Raduga format in Kaluga and Penza, which were commissioned in December 2009. As of 01 November 2010 the total



trading floorspace of the stores in the chain amounts to about 442.55 thousand square meters. <...>

The performance results and expectations

In 2009 the Auchan sales in Russia according to RSBU (Russian Accounting Standards) increased by 23.6% and amounted to 158.36 billion roubles. <...>

Commissioning of the stores

On 14 December of 2010 in St. Petersburg it is planned to open a TRC LETO shopping and recreation center at the intersection of Pulkovo highway and KAD (ring road). The Auchan hypermarket will occupy 11.6 thousand square meters at the first floor of the center (trading floorspace is 9 thousand square meters).

<...>

Atac-Rossiya, Ltd. / Atac retail chain



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Chain development

As of 01 December 2010 Atac chain includes 45 supermarkets in 5 regional areas of RF: Moscow (17), Moscow region (20), Tver region (2), Ryazan region (2), Vladimir region (2), and Tula region (2). The summarized trading floorspace of the stores in the chain is about 43.2 thousand square meters. The number of employees exceeds 1 700 people. In September 2010 three Atac supermarkets were commissioned in Moscow and Moscow region. In October 2010 commissioned 3 supermarkets Atac in Moscow and Yula regions. <...>

Commissioning of the stores

On 03 November 2010 an Atac supermarket was opened in Voskresensk, Moscow region at 17, str. Kagana, at TC Atrium shopping center with trading floorspace of 850 square meters.

<...>

Demo-version

The full text of the section for each of the top-10 commercial networks of the Russian Federation contains a description of key events during the reporting period, as well as plans for the development of retailers in the short and long term. Information on each network are grouped into: development of a network, the results of operations and forecasts, investment, opening / closing stores, new formats, logistics, private label, corporate events.