

S U R V E Y

NON-FOOD RETAIL AND CONSUMER MARKET OF RUSSIA

Results of 2018 and Trends for 2019
DEMO VERSION

INFO *Line*

информационное агентство

information agency

- RETAIL PERFORMANCE INDICATORS
- RETAIL STATE REGULATION
- NON-FOOD RETAIL MILESTONES
- RATINGS OF NON-FOOD RETAIL COMPANIES

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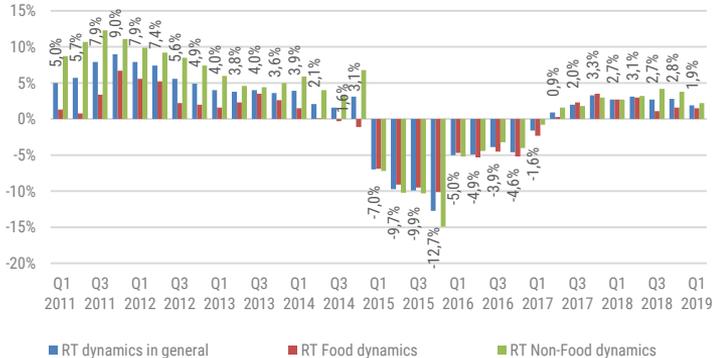
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- **Branch Ministries, Departments and Associations**
- **List of Sources**
- **List of Abbreviations**
- **Information Use Agreement**
- **About the Author: INFOLine Information and Analytical Agency**

1.2. RETAIL TURNOVER

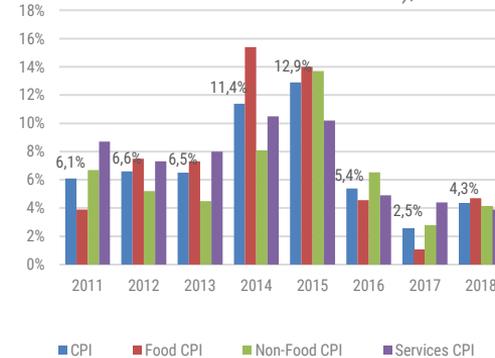
- In 2018, the retail turnover (RT) of Russia continued to show a positive trend, which began in 2017 after two years of decline (-4.8% in 2016 and -10% in 2015). In 2018, retail turnover amounted to **RUB 31.6 trln**, an increase of **2.8%** in physical terms and **6.2%** in monetary terms. According to the MED forecasts of April 2019, it is expected that the retail turnover growth in physical terms will slow down to **1.6%**; it will accelerate to **2.1%** in 2020 and to **2.5%** in 2021.
- In 2018, the downward trend in the share of food products in the retail trade continued: the share of Food retail turnover in 2018 was **47.7%** that is **0.7 pp** lower than in 2017. At the same time, in the Non-Food segment, the largest sales growth was observed in such categories as mobile phones, computers, household appliances, sporting goods and automobiles.
- On average, in 2018 inflation (CPI) was **2.9%**. In Q1 2019, CPI accelerated to **5.2%**, including to **5.8%** for the Food CPI, to **4.6%** for the Non-Food CPI and the **5.1%** for Services CPI. The highest increase in prices was noted in such categories as sugar (**29.5%**) and eggs (**19.3%**) for food products, and in tobacco products (**9.8%**) and motor gasoline (**9.6%**) for non-food products.

Dynamics of Retail Turnover, in % of the Corresponding Period of the Previous Year



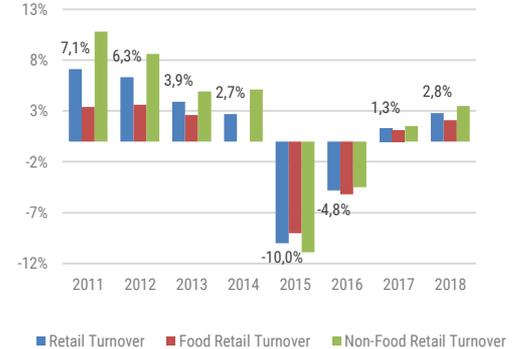
Source: FSSS

Growth Rate of Consumer Prices (December to December of the Previous Year), %



Source: FSSS

Retail Turnover, % YoY

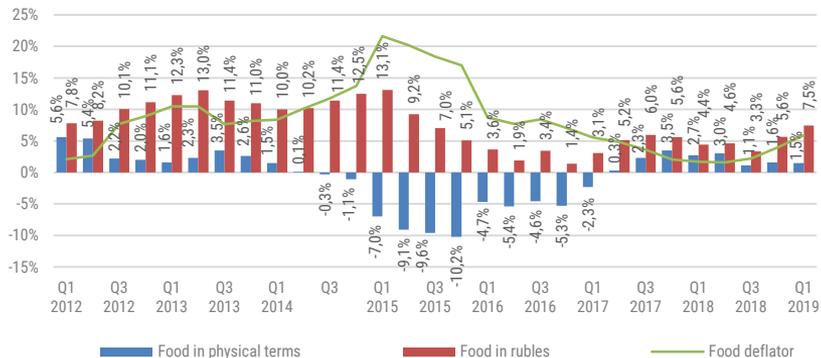


Source: FSSS

1.3. RETAIL TURNOVER BY TYPE OF GOODS

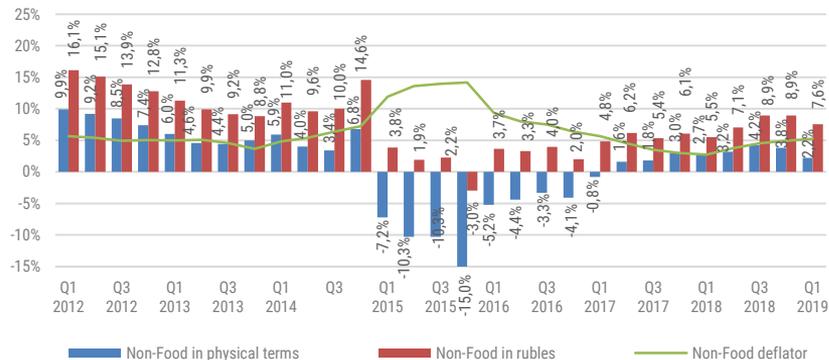
- In 2018, Food retail turnover grew in physical terms by **2.1%** to **RUB 15.06 trln** (by **4.5%** in monetary terms).
- In 2018, Non-Food retail turnover increased by **3.5%** up to **RUB 16.52 trln** (by **7.7%** in monetary terms). In Q4 2018, there was an increase in consumer demand for durable goods and, accordingly, Non-Food turnover in anticipation of a VAT increase from 18% to **20%** from January 1, 2019.
- In 2018, consumer behavior patterns are changing from savings to lean consumption. At the same time, in 2018 there was a record level of promotion activity of the largest FMCG chains, which among the Non-Food categories focus on children's goods, cosmetics and drogerie, pet products, school and office goods, and the share of consumer spending on the purchase of culinary products and visiting food outlets increased.
- Consumers, especially young people, are aimed at convenience and time saving. This stimulates the development of e-Commerce (including purchases from foreign online stores and marketplace) and negatively affects traffic and sales in FMCG supermarkets and Non-Food retail stores.

Dynamics of Food Retail Turnover, in % year-on-year



Source: INFOline according to the FSSS data

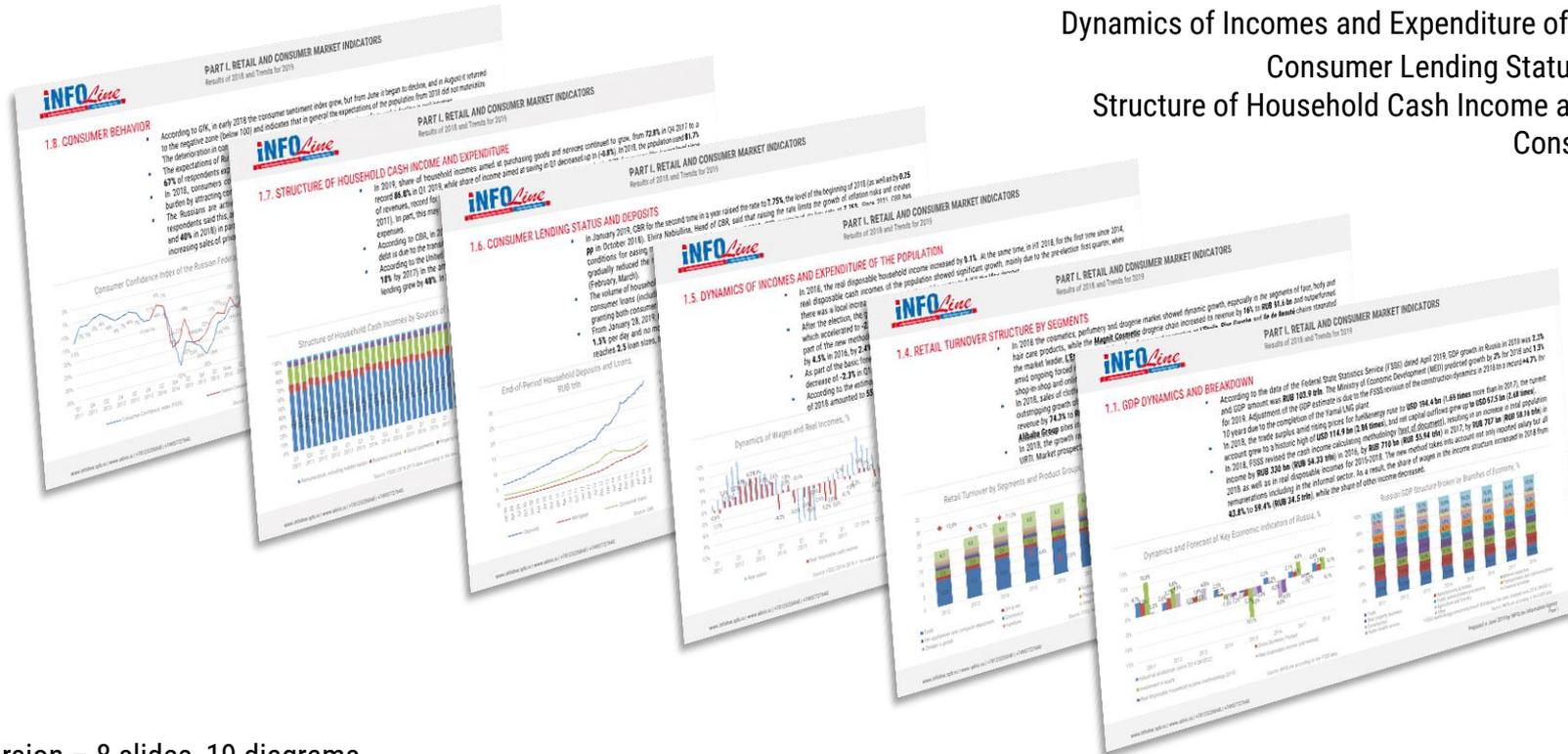
Dynamics of Non-Food Retail Turnover, in % year-on-year



Source: INFOline according to the FSSS data

PART I. RETAIL AND CONSUMER MARKET INDICATORS

GDP dynamics and breakdown
Retail Turnover Structure by Type of Goods and by Segments
Dynamics of Incomes and Expenditure of the Population
Consumer Lending Status and Deposits
Structure of Household Cash Income and Expenditure
Consumer Behavior



In full version – 8 slides, 19 diagrams

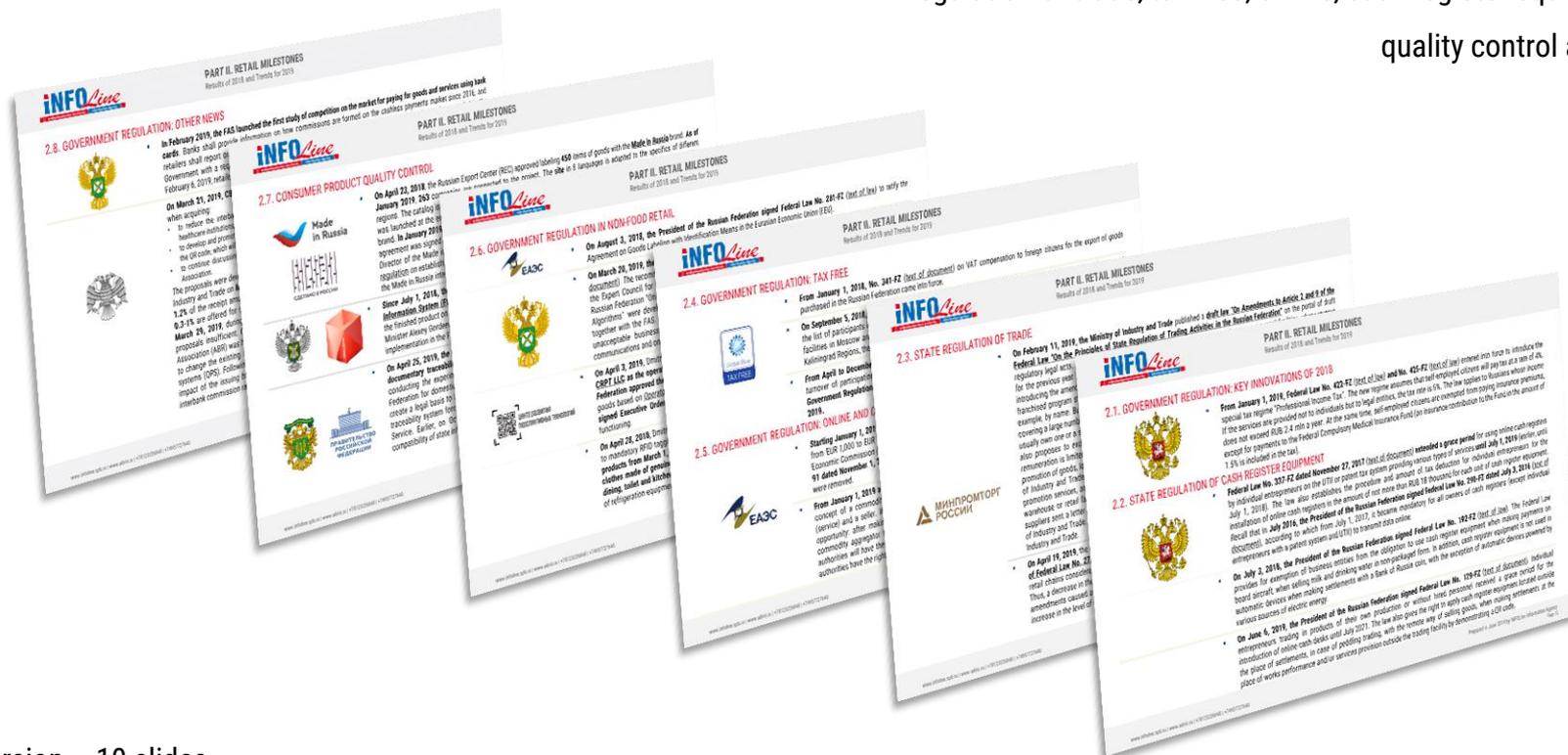
2.1. GOVERNMENT REGULATION: KEY INNOVATIONS OF 2018



- **From January 1, 2019, Federal Law No. 303-FZ dated August 3, 2018 entered into force** ([text of law](#)). The law provides for an increase in VAT from **18 to 20%** from January 1, 2019. The preferential rate on children's and socially significant goods remains at 10%. The increase in VAT did not affect small businesses on the simplified tax system (STS), unified tax on imputed income (UTII) or patent tax system exempt from VAT. In addition, until 2025 there will be a zero VAT rate for air travel to Crimea and Sevastopol. A zero rate is also fixed for air transportation to the regions of the Far Eastern Federal District and the Kaliningrad Region. According to CBR, in general, the effect of VAT increases on consumer price growth in Q1 2019 was moderate, as evidenced by the moderate increase in prices of non-food products and unregulated services that are subject to VAT at a base rate of 20%. The impact of VAT increases on retail prices was limited by the desire of large retail chains to distribute the price increase over time and make it less noticeable for buyers, as well as ruble strengthening in the face of limited consumer demand due to accelerated decline in real disposable incomes and increased repayment and loan servicing costs. Thus, the transfer of VAT increases to retail prices turned out to be longer than CBR and MED assumed, and the contribution to inflation will be near the lower limit of the previously announced range of 0.6-1.5%. With this in mind, the Bank of Russia lowered its annual inflation forecast for the end of 2019 from 5.0-5.5% to 4.7-5.2% and expects that the quarterly growth rate of consumer prices in annual terms will slow down to 4% already in H2 2019, and annual inflation will return to 4% in H1 2020.
- **From January 1, 2019, Federal Law No. 350-FZ dated October 3, 2018** ([text of law](#)) entered into force to introduce a phased (from January 1, 2019) increase in the retirement age to 65 and 60 years (men and women, respectively (with features depending on place of residence, seniority, position, etc.)), a new procedure for indexing insurance pensions (it is assumed that the size of pensions will be indexed above the inflation level), preserving the current procedure for assigning a funded pension, an urgent pension payment and a lump-sum payment, establishing a new procedure unemployment benefits (it is assumed that the minimum benefit will increase from RUB 850 to RUB 1,500 per month, and the maximum will rise from RUB 4,900 to RUB 8,000 per month), preserving the right to early retirement benefits for citizens recognized as unemployed (for two years before the age giving the right to receive such a pension including ahead of schedule), etc.

PART II. RETAIL STATE REGULATION

State regulation in Non-Food retail: key innovations of 2018, state regulation of trade, tax free, online, cash register equipment, product quality control and other news

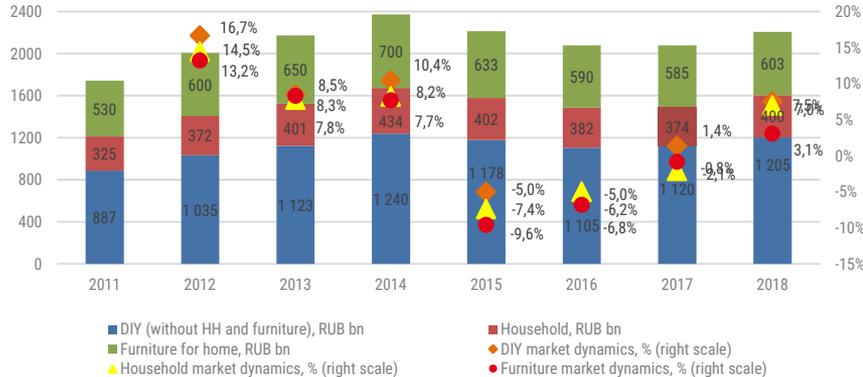


In full version – 10 slides

3.3.1. DIY&HOUSEHOLD AND FURNITURE RETAIL SALES

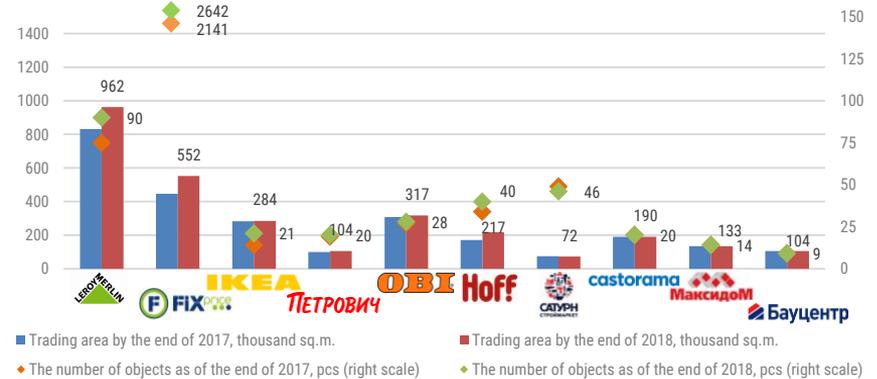
- In 2018, the DIY&Household trade market in Russia grew by **7.4%** to **RUB 1.6 trln** in monetary terms that is close to the record level in 2014 (**9.8%**), and home furniture sales increased by **3.1%**. Pent-up demand realized by consumers and the activity of the real estate market amid a record number of mortgages and consumer loans were growth drivers. The growth trend in sales of finished apartments has intensified, which contributes to an increase in interest in the development of the B2B channel.
- According to the results of 2018, Leroy Merlin already occupies more than **21%** of the DIY market, which intensifies the competition that even large international chains cannot withstand: in mid-2018 the K-Rauta chain left the Russian market, and at the end of 2018, Kingfisher Group developing the Castorama chain in Russia announced its exit.
- In 2018, chains slowed down the rate of organic growth and limited the opening of new retail facilities, but stepped up investments in the reconstruction of existing facilities providing customers with options for ready-made interior solutions, developing an online channel and omnichannel model and experimenting with small formats.

DIY&Household and Furniture Retail Sales in Russia



Source: INFOLine Russian DIY Market

Operational Indicators of Russian TOP-10 DIY&Household and Furniture Chains



Source: corporate data, INFOLine estimates

3.9. LARGEST M&A DEALS

Participants	Asset	Cost, RUB bn	Closing date	Deal format and description	
 Leroy Merlin	 K-Rauta	12 hypermarkets	12.0	March 2018	<p>In February 2018, Kesko Corporation announced the termination of its trading activities in Russia. 12 K-Rauta hypermarkets with a total area of 95.1 thousand sq.m were sold for RUB 12 bn to Leroy Merlin, which during 2018-2019 reconstructs and opens them under its own brand (as of April, 10 retail outlets have already been opened). Two K-Rauta hypermarkets in Tula and Yaroslavl were not included in the deal and were closed in May 2018. The K-Rauta chain revenue in 2017 amounted to RUB 12.1 bn; in 2018, as a result of the sale of balances, according to INFOLine estimates, it did not exceed RUB 3.8 bn.</p>
 Safmar Group	 Eldorado LLC	100% of Eldorado LLC	45.5	April 2018	<p>In April 2018, M.Video acquired Eldorado retail chain (the main beneficiary of both chains is the Safmar Group). A loan of about RUB 40 bn was attracted to pay for the asset and its own free funds were used. The combined business was headed by Alexander Tynkovan and Enrique Fernandez. The legal merger process was completed in Q1 2019, with the company retaining and continuing to develop both retail brands.</p>
 Safmar Group	 MediaMarktSaturn	42 facilities of MediaMarkt 15% stake in M.Video PJSC	32.0*	August 2018	<p>In August 2018, the Safmar Group and MediaMarktSaturn announced the conclusion of an agreement according to which the Safmar Group acquired 42 MediaMarkt hypermarkets in 22 cities of the Russian Federation and sold a 15% stake M.Video PJSC to MediaMarktSaturn. The total deal amount is USD 470 mln, part of which was paid as 100% of MediaMarkt Russia shares (for the deal, the asset was valued at approximately USD 170 mln). After the closure of the deal, MediaMarktSaturn took the positions of director and observer in the Board of Directors of M.Video PJSC, and M.Video got MediaMarkt stores that were rebranded in M.Video and Eldorado in H2 2018. At the same time, the small-format MediaMarkt facilities at Metro Cash & Carry shopping centers were closed.</p>

* INFOLine calculations at the rate of 68.0821 RUB/USD as of August 31, 2018

3.10. REBRANDING AND NEW FORMATS IN NON-FOOD RETAIL CHAINS



- **In March 2018, the Leroy Merlin DIY chain launched a test facility in the new Leroy Merlin Kwartira format in a detached pavilion of 125 sq.m in the territory of the Skolkovsky residential complex in the city of Odintsovo (Moscow Region). The interiors presented at Leroy Merlin Apartment are adapted to the layouts of the complex's apartments: 21 ready-made interior solutions and the possibility to order comprehensive decoration of the apartment at a fixed price. In 2019, the development of the format was completed.**
- **In 2018, the Leroy Merlin Order Fulfillment Center was opened at the site of the former K-Rauta hypermarket in St. Petersburg.** On its territory there are a warehouse, an open building yard, a client area and parking. At the center, customers can receive an online order, make an order and receive it after 30 minutes, or order home delivery.
- In April 2019, the first small format Leroy Merlin store (Leroy Merlin Gorodskoy) was opened with an area of 1.2 thousand sq.m. The range includes about 4.5 thousand goods, more than 30 thousand goods from the chain range can be ordered with delivery to the store or home. In 2019, it is planned to open 2 more such facilities with an area of **1.5-2** thousand sq.m located in the Moscow Ring Road near the metro and in areas with high residential development.
- **By the end of 2019, Leroy Merlin plans to reorganize 50 of its previously opened 70 stores.** Within the new concept, the hypermarket will be divided into several functional zones, each of which is responsible for different moments of life. In the project sales area, it will be possible to create a layout of the kitchen or dressing room. Self-service areas (with a range of about **4** thousand products), inspiration area, and a zone of ordering and the issuance of customer orders will also be presented.
- **In 2017, the OBI DIY chain launched a project to upgrade all hypermarkets in Russia.** The changes are related to the global range update entailing a radical change in the presentation of goods, location of a number of sections and categories, as well as price offer optimization. In March 2018, the first hypermarket built in accordance with the new concept was opened in the city of Volzhsky (Volgograd Region). As of April 2019, remodeling affected 8 trading outlets of the OBI chain including all Moscow facilities. Until the end of 2019, it will be complete in 2 more hypermarkets (OBI Pulkovo and OBI Kosmonavtov). In 2020, a full update will be carried out in OBI Dybenko and OBI Parnas, i.e. it will affect all facilities in St. Petersburg.



PART III. SITUATION IN CERTAIN SEGMENTS

Retail sales by segments (DIY&Household and Furniture, Household Appliances, Computer Equipment and Mobile Devices, Fashion, Children's Goods, Pharmacy, Cosmetics and Drogerie), TOP-10 retailers by segments, M&A deals, rebranding and new formats

In full version – 34 slides, 30 diagrams

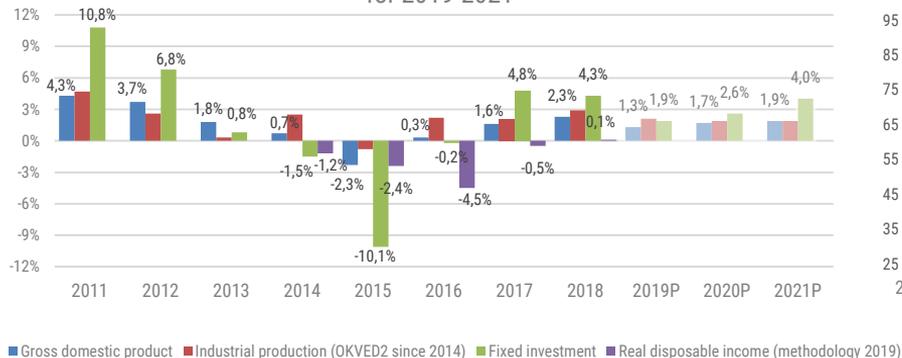
4.1. DYNAMICS OF RUSSIAN MACROECONOMIC INDICATORS

- In mid-2019, analysts and government agencies began to deteriorate forecasts for the Russian main macroeconomic indicators for 2019-2021. So, in June, CBR lowered its GDP growth forecast from **1.2-1.7%** to **1.0-1.5%** in 2019. In July, the IMF downgraded its forecast for GDP growth by 0.2 pp to **1.2%** in 2019.
- According to INFOLine, the reasons for worsening Russian economic growth expectations are less related to the risks of a slowdown in the global economy, and it is primarily affected by internal factors.
- The INFOLine forecast was confirmed: the effect of ruble devaluation almost completely exhausted itself in 2018-2019.
- A survey of leading manufacturers conducted by INFOLine in H1 2019 shows that the main factor hindering the development of companies is the rising production cost, as stated by more than **70%** of respondents.
- Amid the stagnating real incomes of the population, domestic market saturation, tightening of state regulation and other factors, Russian companies are reducing profitability. The development of companies is increasingly based on the strategy of vertically integrated holdings (from production to marketing of finished products).



March 6, 2019. State Duma of the Russian Federation. Minister of Economic Development M. Oreshkin. Report entitled "On the Priorities of the Medium-term Social and Economic Development of the Russian Federation."

Dynamics of Main Russian Macroeconomic Indicators in 2011-2018 and Forecast for 2019-2021



Source: MED, FSSS, INFOLine calculations (baseline scenario)

Dynamics of CBR Foreign Exchange Rates in 2011-2018 and Forecast for 2019-2021



Source: CBR, INFOLine calculations (baseline scenario)

PART IV. FORECAST FOR NON-FOOD RETAIL TRADE

Scenario conditions of development of Russia

Scenarios of Non-Food retail trade development up to 2021

Forecasts of revenues and expenditures of the population up to 2021

Forecast of Non-Food retail trade development, including sales channels

3 scenarios of industry development

Full version – 7 slides, 8 diagrams

COMPREHENSIVE RANGE OF RESEARCHES AND REVIEWS OF RUSSIAN RETAIL TRADE

INFOline Retail Russia TOP-100

Foodtech: online trade and delivery services. INFOline Russia TOP online food retail Rating (results of 2018 and quarterly review)

Food and Non-Food retail and consumer market of Russia. Results of 2018. Trends of 2019. Forecast up to 2021

Russian consumer market and FMCG retail chains rating (results of 2018 and monthly review)

Analytical Database: 700 FMCG Chains of Russia (standard and extended versions)

Russian DIY market. Results of 2018. Trends of 2019. Forecast up to 2021 (standard and extended versions)



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To find more about individual research you may contact us by e-mail retail@advis.ru or by phones +7(812)322-68-48 or +7(495)772-76-40

RESEARCH NON-FOOD RETAIL AND CONSUMER MARKET OF RUSSIA. RESULTS OF 2018 AND TRENDS FOR 2019



Release date: **March 2019**

Number of pages: **120 (Number of diagrams: 90)**

Language: **Russian / English**

Format: **Presentation (PDF)**

Price: RUB **150 000**

Structure:

PART I. Retail and Consumer Market Indicators (8 slides) GDP Dynamics and Breakdown. Retail Turnover. Retail Turnover by Type of Goods. Retail Turnover Structure by Segments. Dynamics of Incomes and Expenditure of the Population. Consumer Lending Status and Deposits. Structure of Household Cash Income and Expenditure. Consumer Behavior.

PART II. Retail state regulation (10 slides) State regulation of non-food retail trade (including key innovations of 2018, regulation of cash register equipment, cross-border trade, online, etc.).

PART III. Situation in Certain Segments (34 slides) Market dynamics and capacity, development trends and forecasts, forecasts for market segments (DIY&Household and furniture, household appliances, computer equipment and mobile devices, fashion and children's products, cosmetics and drogerie, pharmacy segment, online trading). For each segment, chain ratings (by revenue, number of stores and selling space) and development prospects of the largest retailers are also presented. Characteristics of key industry events: development of the logistics system and distribution centers, M&A deals, rebranding and development of new formats.

PART IV. Forecast for Non-Food retail trade (7 slides) Scenario conditions and indicators of Russian economic development in 2019-2021, INFO Line Non-Food retail development scenarios, forecast of population income and expenditure dynamics, retail turnover forecast, Non-Food retail turnover forecast by segments: DIY&Household and furniture, household, computer equipment and mobile devices, fashion and children's goods, cosmetics and drogerie, pharmacy segment, online-trade. **Updated in October 2019.**

RESEARCH FOOD RETAIL AND CONSUMER MARKET OF RUSSIA. RESULTS OF 2018 AND TRENDS FOR 2019. FORECAST UP TO 2021



Release date: **March 2019**
Number of pages: **67 (Number of diagrams: 114)**
Language: **Russian / English**
Format: **Presentation (PDF)**
Price: RUB **150 000**

Structure:

PART I. Retail and Consumer Market Indicators (8 slides) GDP Dynamics and Breakdown. Retail Turnover. Retail Turnover by Type of Goods. Retail Turnover Structure by Segments. Dynamics of Incomes and Expenditure of the Population. Consumer Lending Status and Deposits. Structure of Household Cash Income and Expenditure. Consumer Behavior.

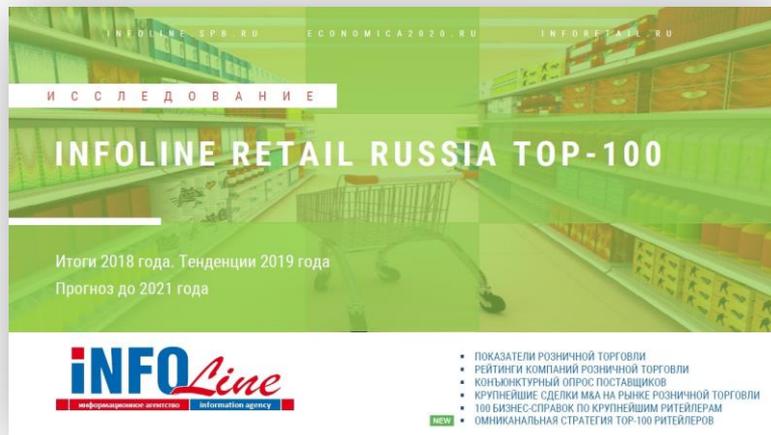
PART II. Retail milestones (13 slides) Key innovations of 2018 and changes in excise duties. Government regulation of retail. Return prohibition law. Cash register equipment. Tax Free. Online and cross-border trade. Consumer product quality control. Relationship with EU, USA and Turkey: regulation of sanctional products.

PART III. FMCG Retail Performance (37 slides) Dynamics and structure of market, shares of largest players, number and area of retailers (based on data from TOP-200 FMCG chains, dynamics and forecast of investment activity, trends and development forecasts. Ratings of chains by revenue, retail space, by formats. Online trade development by FMCG and Foodtech chains. Wholesale trade development. Launch of FMCG chain distribution centers. Largest M&A deals.

PART IV. Market survey of leading FMCG suppliers (8 slides). Sales results of leading FMCG suppliers in 2016-2018 and forecast for 2019. Factors impeding suppliers development and criteria of successful retail chain operation. Government regulation. Interaction of leading suppliers with FMCG chains, share of leading suppliers sales through FMCG chains. Promo sales and special range for FMCG chains. Online sales and exports in sales structure in 2018 and forecast for 2019. **Updated in May 2019.**

PART V. Forecast for Food retail trade (11 slides). Scenario conditions and indicators of Russia's economic development in 2018-2020, scenarios of Food retail development, elaborated by INFO Line, the forecast of the dynamics of the population's income and expenditures, the forecast of retail trade turnover, the forecast of Food retail turnover by sales channels, forecast of the number and sales spaces of FMCG outlets by sales channels. **Updated in October 2019.**

RESEARCH INFOLINE RETAIL RUSSIA TOP 100. RESULTS OF 2018. TENDENCIES OF 2019. FORECAST UNTIL 2021



Release date: **June 2019**

Number of pages: **360 (Number of diagrams: 300)**

Language: **Russian**

Format: **Presentation (PDF)**

Price: RUB **100 000**

Structure:

PART I. Indicators of retail trade in Russia Dynamics of GDP, investments and industrial production, GDP structure by economic activity types, retail trade turnover, financial condition of households, distribution of population by per capita income, state of consumer lending and deposits, market structure and level of consolidation of retail trade

PART II. Рейтинг крупнейших ритейлеров INFOLine Retail Russia TOP-100 Russian retail market structure and forecast for 2021. Indicators of INFOLine Retail Russia TOP-100 rating: dynamics of profit and revenue per 1 sq. m by rating segments, net increase of retail space of TOP-100 retail chains. INFOLine Retail Russia TOP-100 Rating by revenue, rank rating, ratings by number of stores and retail space, net revenue, sales density, the fastest growing and fastest-falling chains

PART III. Market survey of DIY and FMCG suppliers Sales dynamics of the largest FMCG and DIY suppliers, the share of sales of the largest suppliers through chains segment, sales of the largest suppliers through the Internet, the interaction of the largest suppliers with retail chains, development of companies and state regulation, barriers to suppliers development, etc.

PART IV. Largest M&A deals at the retail market Analysis of consolidation processes and description of M&A deals by segments, realized in 2018-2019.

PART V. Appointments and resignations at the retail market Appointments and resignations of key executive managers in retail companies by segments, as well as in regulative bodies

PART VI. Development of online trade rating of chains by online sales, key events in the development of online trade in 2018-2019, which can have an impact on the development of offline networks, state regulation of online trade

PART VII. TOP-100 largest chains in Russia business profiles include a standardized structured description of operational indicators (number of objects, retail space), financial indicators and performance indicators, key events of the chain, the main formats of trade, investment activity, regional representation, development of logistics and private labels, information about TOP management and beneficiaries, as well as plans and development prospects, descriptions of online shops of chains.

DIY Market in Russia. Results of 2018. Tendencies of 2019. Forecast until 2021

Extended version**Standard version**

Release date: **August 2019**
Number of pages: **300/650**
Versions: **Standard / Extended**
Language: **Russian / English (upon request)**
Format: **PDF**
Price: RUB **90 000**

Content

- Analysis and forecast of DIY retail market of Russia. Key development trends
- **Results of the market survey of the largest suppliers of DIY market**
- Rating of largest universal retail chains - DIY Retail Russia TOP
- **Rating of largest specialized DIY chains**
- Regional development of largest DIY trading companies
- **Business profiles of TOP-30 operators of Russian DIY market**

Advantages of the Research

- Dynamics of macroeconomic indicators
- **Operational and financial results of the largest 800 DIY chains**
- Forecast and trends of DIY retail market development in Russia
- **Analysis of chain trade by all range of construction and finishing materials (Hard and Soft DIY), household goods and garden equipment**
- Coverage of small-scale wholesale goods

ANALYTICAL DATABASES: 300 UNIVERSAL AND 300 SPECIALIZED DIY CHAINS

Universal DIY chains



Release date: **July/September 2019**

Number of pages: **314/135**

Language: **Russian / English (upon request)**

Format: **PDF**

Price: RUB **35 000**

Specialized DIY chains



Content

- Rating DIY Retail Russia TOP-30 (50 for the database of specialized chains)
- **Results of the market survey of the largest suppliers of DIY market**
- Rating of specialized chains – TOP-50 by activity areas (for the database of specialized chains)
- **Database of 300 universal/ 300 specialized DIY chains**
- Business profiles of TOP-10 DIY retailers (for the database of universal chains)

Advantages of the Research

- **Operational and financial results of 800 largest DIY chains**
- Forecast and development trends of Russian DIY retail market

RUSSIAN HOUSEHOLD MARKET. RESULTS OF 2018. TRENDS OF 2019. FORECAST UP TO 2021



Release date: **October 2019**

Number of pages: **250**

Language: **Russian / English (upon request)**

Format: **PDF**

Price: RUB **70 000**

Content

- Analysis and dynamics forecast of Russian Household and DIY markets
- Development of online trade on Russian Household and DIY markets
- Rating INFOLine Retail Household TOP-30
- Ratings of largest DIY and FMCG hypermarkets chains by revenue, number, retail space
- Business profiles by 7 largest Russian Household retailers

Advantages of the Research

- Dynamics of macroeconomic indicators including results of H1 2018
- Forecast of Russian Household retail market development
- Development and key peculiarities of Household formats and hypermarket format in DIY and FMCG segments
- Analytical database 100 Household chains with operational and financial indicators (including contact data, management, regional presence)

ANALYTICAL DATABASES: 200 HOUSEHOLD AND FURNITURE RETAIL CHAINS AND 100 HOUSEHOLD RETAIL CHAINS

200 Household



100 Household chains

Release date: **October 2019**Number of pages: **150/130**Language: **Russian / English (upon request)**Format: **PDF**Price: RUB **60 000** / RUB **40 000**

Content

- Rating INFOLine Retail Household TOP-30
- Rating of TOP-20 DIY hypermarkets chains with Household goods by revenue, number, retail space
- Rating of TOP-20 FMCG hypermarkets chains by revenue, number, retail space
- 200 Household chains also including Rating of TOP-10 furniture chains
- Business profiles on 7 largest Household retailers

Advantages of the Research

- Analytical database 100 Household chains with operational and financial indicators (including contact details, management, regional presence)
- 200 Household and furniture chains also includes analytical database of 100 furniture chains

ANALYTICAL DATABASE: 700 FMCG CHAINS OF RUSSIA. 2019

Extended version

Standard version

Release date: **May 2018 (Update: May 2019)**Number of pages: **530**Versions: **Standard/ Extended**Language: **Russian/ English (upon request)**Format: **PDF**Price: RUB **80 000**

Content

- Current state of FMCG retail market
- TOP-50 Rating (TOP-100 in extended version) of the largest FMCG retailers (extended version also includes TOP-10 chains of stores at filling stations and TOP-20 specialized chains)
- Description of main formats of FMCG chain retail
- Database 700 chains and 600 warehouses of Russian FMCG chains

Advantages of the Research

- Dynamics of macroeconomic indicators since 2007
- Operational and financial results of the largest FMCG chains
- Forecast and trends of FMCG retail market development in Russia
- Analytical database containing operational and financial indicators of Russian 700 FMCG chains split by Federal districts, highlighting specialized chains and the "store at filling station" format.

MONTHLY INDUSTRY REPORT: RUSSIAN CONSUMER MARKET AND FMCG RETAIL CHAINS RATING

Russian version



English version



Update: **every month**

Language: **Russian/English**

Number of pages: from **290/** from **130**

Format: **PDF**

Price (month): RUB **20 000** / RUB **25 000**

Annual subscription (12 months): RUB **120 000** / RUB **180 000**

Project description

- Description of retail trade development in Russia (macroeconomics, state regulation etc.)
- Description of most important events in the Russian FMCG retail trade (including a Case on most topic issues)
- Main events and development plans of over 200 Russian FMCG retail chains (operational, financial indicators, plans and development forecasts, M&A deals etc.)

Advantages of the Review

- Dynamics from 2014
- Monthly monitoring of activities of over 200 largest FMCG retail chains
- Monthly analysis of consumer market and influence of key events on Russian FMCG retail trade
- **Verified contact details**
- Table and /or graphic materials on:
 - operational and financial indicators of chains;
 - investment activity
 - regional presence;
 - openings/closings of objects.
- **Over 5 000 analyzed sources**

NEW! FOODTECH: ONLINE TRADING & DELIVERY SERVICES. INFOLINE RUSSIA TOP ONLINE FOOD RETAIL RATING



Release date: **every quarter**

Number of pages: **100**

Language: **Russian**

Format: **PDF**

Price (month): RUB **50 000**

Annual subscription: RUB **100 000 (50% discount)**

Content

- **Рейтинг INFOLine Russia TOP online food retail**
- **State regulation in online trade**
- **Events and trends in online trade industry**
- **Cases about online trade development**
- **Indicators and events of delivery services**
- **Indicators and events of online shops of FMCG chains**
- **Largest online retailers and marketplaces on Food market**
- **Projects of Yandex and Mail.ru Group**

Advantages of the Research

- **Quarterly analysis and structured description of milestone events of Food online trade, state regulation**
- **Quarterly monitoring of activities of largest online shops, delivery services, marketplaces, including: milestone events, description of operational, financial and investment activities, characteristics of company's business (regions of presence, number of website visitors, partnerships etc.)**

INDUSTRY SURVEY RUSSIAN CONSUMER MARKET AND FMCG RETAIL CHAINS RATING. RESULTS OF 2018



Release date: **March 2019**
Number of pages: **370**
Language: **Russian**
Format: **PDF**
Price: RUB **80 000**

Structure

FMCG retail chains rating

Operational results of TOP-200 FMCG Retail chains by formats (number and retail space of hypermarkets, supermarkets, discounters, convenience stores)
Ratings (number, retail space, revenue) of **TOP-50 by 2018 results**
Financial performance of public retailers
Investment activity of the TOP 200 largest FMCG chains in Russia

Section I. Development of retail trade in Russia

Macroeconomic retail trade indicators
The structure of retail turnover by types of products, organizations, regions
Government regulation of retail trade
Inflation
Income and expenses of the population, loans and deposits
Consumer expectations

Section II. Major developments in the FMCG retail trade

Sanctions of the EU, USA and other countries, and their impact on the retail trade of Russia The most Important events that can have an impact on retail trade
Marking of products
Activity of INFOLine

Section III. Cases on the Russian retail development

Cases on consumer behavior and expectations, state of households, key trends in retail market development, trends and technologies of market development, etc.)

Section IV. Events and development plans of the TOP 200 FMCG chains in Russia

Operational information on more than 200 companies, including:
Results and prospects of the chain development
Operational and financial performance
M&A deals, investment activities, corporate events
Logistics, interaction with suppliers and consumers
NEW! Regional presence of retail chains (presented as a table)
NEW! Opening and closing of retail chains (presented as a table)

RESEARCH RUSSIAN MARKET OF ADVERTISING MATERIALS IN POINTS OF SALE (POSМ). THE RESULTS OF 2018



Release date: **April 2019**
Number of pages: **120**
Language: **Russian / English**
Format: **Presentation (PDF)**
Price: RUB **50 000**

Structure

PART I. Characteristics and size of POSМ market

Dynamics and forecast of Russian POSМ market, POSМ production in Russia, POSМ external turnover

PART II. POSМ market boundaries and segmentation

POSМ market segmentation in basic consumer categories: brand owners and retailers

PART III. Methods of choosing a supplier

Frequency of application, impact of certificates and industry associations on choice of supplier, rating of POSМ supplier evaluation criteria, main difficulties in ordering POSМ

PART IV. POSМ efficiency

Evaluation of the popularity of various types of POSМ, evaluation of the effectiveness of various types of POSМ, evaluation of the effectiveness of joint projects of brand owners and retailers, strategic partnership of brand owners and retailers

PART V. Analysis of POSМ market trends

Development trends of POSМ market, technological tendencies and innovations

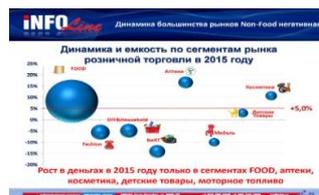
PART VI. Consumer market trends

Description of key trends in the consumer market and their impact on the development of the POSМ market

PART VII. Retail trade state and forecast

Retail trade turnover, structure of retail trade turnover, development forecast of Russian retail trade

INDIVIDUAL ANALYTIC PRESENTATION



CONTAINS ANALYSIS AND FORECAST

- Macroeconomic indicators of retail trade
- State regulation of retail trade
- Incomes and expenditures of population, credits and deposits
- Consumer expectations and population confidence
- Development of Russian largest FMCG chains

Format: Presentation (Power Point)

Language: Russian / English

Number of slides: from 60

Update: every quarter

Price: from RUB 100 000

INDUSTRY SURVEYS

INDUSTRIAL ANALYTICAL SURVEYS

2018 Results and Trends of 2019
Forecast up to 2021

iINFO *Line*

информационное агентство

information agency

SURVEYS OF INDUSTRIES IN 2011-2018 AND FORECAST UP TO 2021

- Construction industry of Russia
- Transport industry of Russia
- Agro-industrial complex of Russia and Production of food in Russia
- Fuel and energy complex of Russia
- Retail and the consumer market of Russia

REVIEWS OF ECONOMY AND KEY INDUSTRIES



INDUSTRY REVIEWS:

- Construction industry of Russia
- Transport industry of Russia
- Agro-industrial complex of Russia and Production of food
- Fuel and energy complex of Russia
- Retail and the consumer market of Russia

- **New!** in 2017 INFOLine presented a series of industry reviews that, in addition to a detailed analysis of the development of the industry, include: ratings, analysis of foreign economic activity, description of the largest M&A transactions, analysis of changes in state regulation, the dynamics of development of industries in the last 5 years and forecast for development of industries in 2018-2020 and some more elements necessary for understanding the current situation and prospects.
- **New!** The studies are published in a convenient electronic presentation format: the optimal combination of key findings and thesis, graphic materials (more than 1000 figures, diagrams, tables), as well as hyperlinks to the most important regulatory documents and company websites. Materials are available in English.
- **New!** A consolidated (by method and structure) set of 7 (!) researches covers all key sectors and markets of the Russian economy. The reviews include scenario forecast and development prospects for the next three years.

Special offer: **You can get a short version of any research of the area you are interested in FOR FREE**, just send your request at mail@infoline.spb.ru or contact us by phones: (812) 322-68-48, (495) 772-7640.

BRANCH MINISTRIES, DEPARTMENTS AND ASSOCIATIONS



- Federal Service for Supervision of Consumer Rights Protection and Human Welfare (Rospotrebnadzor)



- Ministry of Industry and Trade of the Russian Federation (Minpromtorg)



- State Duma Committee on Economic Policy, Industry, Innovative Development and Entrepreneurship



- Federal Agency for Technical Regulation and Metrology of the Russian Federation (Rosstandart)



- Ministry of Finance of the Russian Federation (Minfin)



- Federal Customs Service of the Russian Federation (FCS)



- Ministry of Health of the Russian Federation (Minzdrav)



- Federal Service for Supervision of Healthcare of the Russian Federation (Roszdravnadzor)



- Chamber of Commerce and Industry of the Russian Federation (TPP)



- Retail Companies Association (ACORT)



- Association of Internet Trade Companies (AITC)



- Association of trading companies and manufacturers of electrical household and computer equipment



- Union of Professional Pharmaceutical Organizations

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LIST OF ABBREVIATIONS

AO	Autonomous area	pp	Percentage point
JSC	Joint-stock company	RAPC	Russian Association of Pharmacy Chains
AITC	Association of Internet Trade Companies	RTO	Retail turnover
BCPI	Base consumer price index	DC	Distribution center (warehouse) of the retail chain
GDP	Gross domestic product	REC	Russian Export Center
VEB	Vnesheconombank	CIS	Commonwealth of Independent States
GK	Group of companies	JV	Joint venture
EEU	Eurasian Economic Union	PL	Private label
USAIS	Unified State Automated Information System	MC	Management Company
EU	European Union	AC	Authorized capital
VED	Vital and essential drugs	FAS	Federal Antimonopoly Service
CJSC	Closed joint-stock company	MICEX	Moscow Interbank Currency Exchange
IE	Individual entrepreneur	FSI	Federal State-Funded Institution
CPI	Consumer price index	FG	Financial group
IT	Information technology	PG	Pharmaceutical group
CRE	Cash register equipment	FTS	Federal Tax Service
DP	Drug products	FD	Federal district
MPI	Medical preventive institution		Formats of shopping facilities: hypermarket - a facility with a selling space of 2,500 sq.m.; supermarket - a facility with a selling space of 500 to 2500 sq.m.; discounter - a facility with a selling space of 200 sq.m focused on providing customers with low prices; convenience store (minimarket) - a facility with a selling space up to 500 sq.m.
PP	Pharmaceutical products	FSSS	Federal State Statistics Service
Minkomsvyaz	Ministry of Telecom and Mass Communications of the Russian Federation	FCS	Federal Customs Service
Minpromtorg	Ministry of Industry and Trade of the Russian Federation	CBR	Central Bank of the Russian Federation
Minselkhoz	Ministry of Agriculture of the Russian Federation	Digital economy	Market segments where added value is created using digital (information) technologies
Mintrud	Ministry of Labor and Social Protection	CEO	General director (of the company); Chief executive officer (of the company)
Minfin	Ministry of Finance of the Russian Federation	EBITDA	(Earnings before interest, taxes, depreciation and amortization) analytical indicator equal to the amount of profit before deduction of expenses for interest, taxes and accrued depreciation
MIFNS	Interdistrict inspection of the federal tax service	Food	Food products
SME	Small and medium enterprises	Hard DIY	DIY market segment that includes products for construction, overhaul and base construction
Minekonomrazvitiya	Ministry of Economic Development of the Russian Federation	ICMRA	International Coalition of Medicines Regulatory Authorities
NBCH	National Bureau of Credit Histories	LFL	Like-for-like sales
PIT	Personal income tax	Non-Food	Non-Food Products
PJSC	Public joint-stock company	SKU	Stock keeping unit; range item (unit of one product group, brand, class in one type of packaging of one dimension, capacity, color, etc.)

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ABOUT THE AUTHOR – INFOLine



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