

INDUSTRY REVIEW

Russian consumer market FMCG retail chains rating

The results of 2018-2019

INFO *Line*

информационное агентство

information agency

- FMCG RETAIL CHAINS RATING
- MAIN INDICATORS OF RETAIL TRADE
- FORECAST FOR THE DEVELOPMENT OF FMCG RETAIL TRADE
- FMCG RETAIL KEY EVENTS
- DESCRIPTION OF OVER 200 FMCG RETAILERS



Release date: **February 2019**

Price (without VAT): **RUB 180 000**

Industry review *"Russian consumer market and FMCG retail chains rating. The results of 2018-2019"*



Issue: the results of 2018



12 issues of monthly review
for 2019



PERIODICAL REVIEW "RUSSIAN CONSUMER MARKET AND FMCG RETAIL CHAINS RATING"

Russian version



English version



Project Description

- Description of retail trade development in Russia (macroeconomics, state regulation, etc.)
- Description of key events in FMCG retail of Russia (including the case on pressing issues)
- Main events and development plans for over 200 (10 for English version) FMCG retail chains in Russia (operational, financial indicators, development plans and forecasts, M&A deals, etc.)

Review Benefits

- Dynamics since 2014
- Monthly monitoring of activities of more than 200 largest FMCG retail chains in Russia
- Monthly analysis of the consumer market and the impact of key events on the FMCG retail trade of Russia
- Verified contact details
- Key materials are highlighted in graphics
- More than 5,000 of the analyzed sources

INFOLine INFORMATION PRODUCT COMPLEX: "RUSSIAN FMCG RETAIL TRADE"



8 sections, 140 slides, 157 diagrams, more than 200 chains

Here is a **short version** of the research **"RUSSIAN CONSUMER MARKET AND FMCG RETAIL CHAINS RATING. RESULTS OF 2017. PROSPECTS OF DEVELOPMENT TILL 2020"**, which includes the results of long-term work of INFOLine in the industry:

- Monitoring of the retail market events
- Regular questioning of more than 700 of the largest FMCG retail chains in Russia
- Creation of analytical databases and the formation of company ratings
- The development of retail trade analysis in 2017-2020
- Анализ развития розничной торговли в 2017-2020 гг.

Similar studies on other industries are available at www.economica2020.ru



Daily event monitoring – "Industry news"

The research of FMCG hypermarkets in Russia

Research INFOLine Retail Russia TOP-100

Analytical database "700 FMCG retail chains"

Monthly review "FMCG retail chains rating"

REVIEW DESCRIPTION

RESEARCH METHODS AND DATA SOURCES

- Regular monthly expert interviews and interviews with representatives of more than 200 FMCG retail chains in Russia;
- Questioning of more than 100 FMCG retail chains, monitoring and analysis of operational and financial indicators of more than **"700 FMCG retail chains"**;
- Researches **"Retail trade Food and consumer market in Russia. Results of 2017. Prospects for development in 2018-2019"** and **"Food retail and consumer market of Russia. Growth prospects in 2017-2019"**;
- Researches **"Retail Trade Non-Food and Consumer Market in Russia. Preliminary results of 2017. Development prospects in 2018-2020"** and **"Non-Food retail and consumer market of Russia. Growth prospects in 2017-2019"**.
- Research **"INFOLine Retail Russia TOP 100. Results of 2017. Trends of 2018. Forecast till 2020"**.
- Monthly update of the unique database **"1000 hypermarkets FMCG of Russia"**, which is carried out as part of the preparation of the Research **"The market of hypermarkets FMCG RF" (standard and extended versions)**;
- Monitoring of the status of the retail real estate market, the implementation of investment projects, the introduction of retail properties: **"Shopping centers and hypermarkets FMCG and DIY of Russia. Projects of 2018-2021"**,
- Monitoring of more than 2,000 media outlets and identification of key events in the retail market FMCG, which INFOLine has been carrying out since 2002 as part of the service **"Thematic news: Food retail and FMCG RF retail chains"**, **"Thematic news: Food industry and food market RF"** and **"Themed news: Retail trade of the Russian Federation"**

STRUCTURE AND OBJECTIVES BY SECTIONS

Rating of FMCG retail chains of Russia

Operational results of 200 largest FMCG chains by formats: stores number and selling space dynamics (hypermarket, supermarket, discounter, convenience store).
The most significant stores opening and closing. Ratings by number, selling space, revenue of TOP 50 FMCG chains in Russia (with over RUB 11 bn in revenue), selling space growth structure and dynamics by chains and formats.

Section I. Retail trends and development in Russia

Macroeconomic retail: turnover and money supply dynamics, turnover forecast until 2024. Leading indicator of retail development.
Governmental regulation of retail.
Structure of retail turnover by businesses types and regions
Food market inflation.
Incomes and expenditures of population.
Consumer expectations and confidence of population

Section II. Key events for FMCG retail in Russia

Important events for FMCG retailers in Russia.
Expert assessment of the Russian market by INFOLine's specialists.

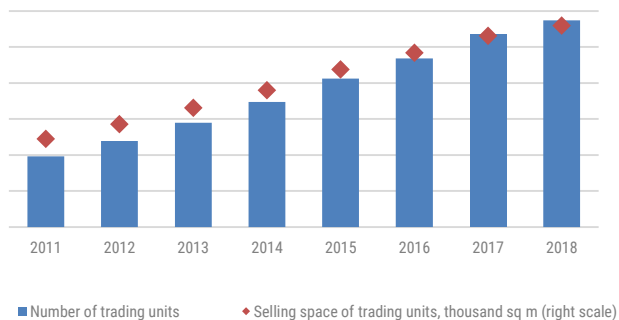
Section III. Key events and plans of major FMCG chains

Current information on 200 largest FMCG retail chains in Russia (for Russian version) and TOP-8 (for English version): strategy and plans, results and forecasts, investments, stores opening and closing, plans for stores opening in 2019, new formats development, resignations and appointments, logistics, private label, interaction with consumers and suppliers, corporate events, top management and contact information. **NEW Regional presence**

RUSSIAN FMCG RETAIL CHAINS RATING

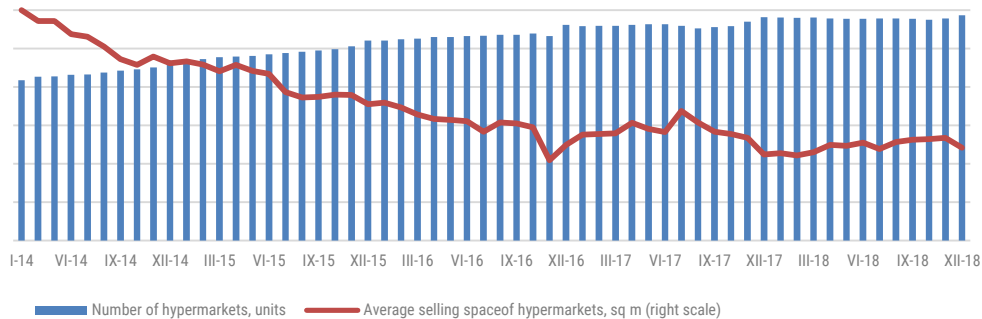
- Subsection "TOP-200 FMCG chains performance" includes:
 - Number of stores and selling space dynamics of 200 largest retailers of Russia by formats
 - Number of stores and selling space of 200 largest retailers of Russia by formats
 - Key opening and closing for the reporting period by format
- Rating and dynamics TOP-50 FMCG retail chains in Russia by number of stores
- Subsection "Rating of TOP-50 largest FMCG retail chains by selling space" includes:
 - Results of investment activity of TOP-200 FMCG retailers in Russia, development plans for TOP-10 retailers
 - Rating and dynamics TOP-50 FMCG retail chains by selling space
- Subsection "Rating of TOP-50 FMCG retail chains in Russia by net sales" includes:
 - Financial indicators and financial performance indicators of public companies
 - Rating and dynamics of TOP-50 FMCG retail chains in Russia by net sales

Number of stores and their selling space of 200 largest retailers of Russia in 2014-2018 (at the end of the period)



Data source: INFOLine

Number of stores and their selling space of 200 largest retailers of Russia by hypermarket format in 2014-2018 (at the end of the period)

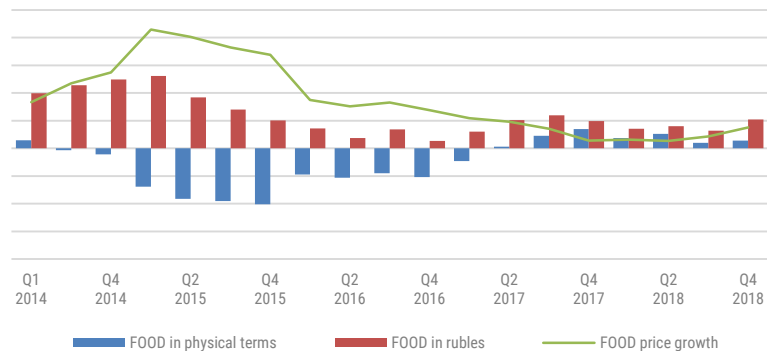


Data source: INFOLine

SECTION I. RETAIL TRENDS AND DEVELOPMENT IN RUSSIA

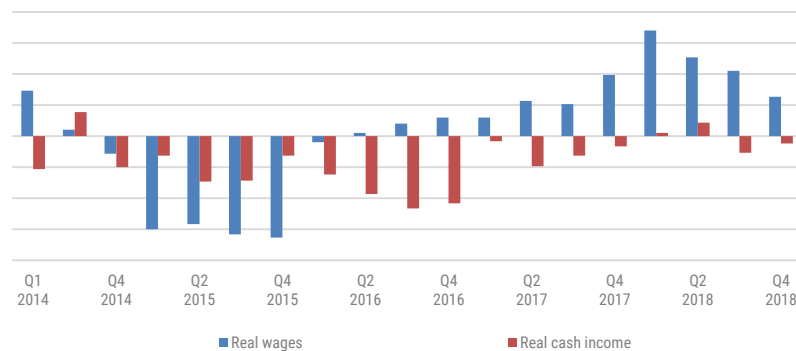
- The subsection "Macroeconomic indicators" contains a description of the dynamics of the retail turnover, including food- and non-food products retail market, the monetary base, as well as the forecast for 2018-2024.
- The subsection "Main indicators of retail development" shows quarterly data on the entrepreneurial confidence index, the average number of employees in retail, the level of stock reserves, Average existing retail margin's level, selling prices, retail product mix, factors restricting retailing operations, etc.
- The subsection "Government regulation of retailing" includes current news of regulation in the sphere of trade ("The Trade Act", etc.): alcohol beverage market, tobacco market, Internet trading, non-stationary trading, etc.
- The subsections "Structure of retail turnover by the category of products/retailer/regional structure of retail turnover" include the structure of retail trade turnover of the Russian Federation in the relevant section for the reporting period and its dynamics.
- The subsection "Inflation in the food market" includes data on inflation in Russia, in the EU countries, and the Pyaterochka Index for the reporting period (for Russian version)
- The subsection "Consumer incomes and expenditures" includes data on incomes and expenditures, it's distribution by age groups, as well as data on loans and deposits, household expenses, their average check and free money (for Russian version), etc.
- The subsection "Consumer expectations and confidence index" demonstrates the dynamics of quarterly data of the consumer confidence index, their assessment of personal material and current situation, and the assessment of economic situation in Russia .

Dynamic RTO food in 2014-2018, % against the same period of previous year.



Data source: FSSS

Real salary and real income dynamics in 2014-2018, %



Data source: FSSS

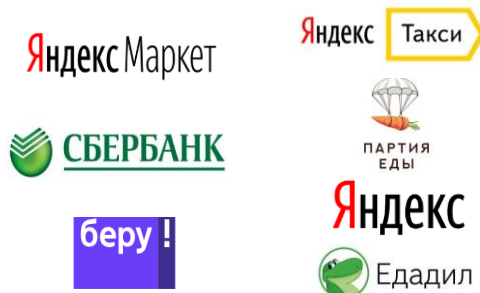
SECTION II. KEY EVENTS FOR FMCG RETAIL IN RUSSIA

- The subsection *"On Prolongation of Counter-Sanctions Restricting Food Product Supplies from the EU, the USA and Some Other Countries"* includes actual information on sanctions against Russia, and counter-sanctions of Russia against the United States, the EU and a number of other countries
- The subsection *"The most important events, capable to influence FMCG retail of Russia"* contains information about the most important events for the reporting period on manufacturers, online, new projects in the retail, new technologies, products, etc.
- The subsection *"Roskachestvo activities"* includes current news on research and activities of Roskachestvo
- The subsection *"Activity of INFOLine"* describes new products from INFOLine in the retail market, as well as interviews, presentations, participation in forums, events (Marketing Day, WorldFood Russia, Russian Retail Week, etc.), competitions, etc.
- The subsection *"Case"* includes operational and analytical information on current issues, including consumer preferences, moods, behavior, expectations, trends in the retail and online retail market, and others. (available in Russian version)

Interaction with the USA and EU countries in the context of sanctions



Key events: new projects, online trading news, etc.



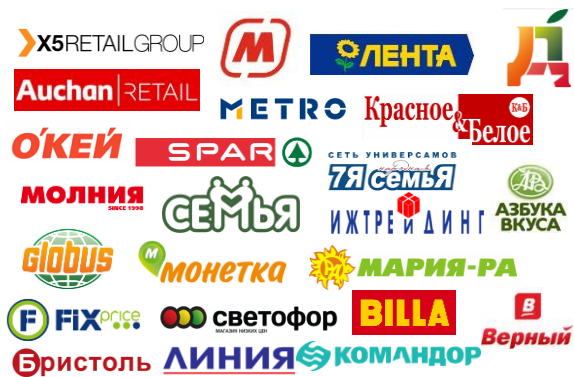
Activity of INFOLine



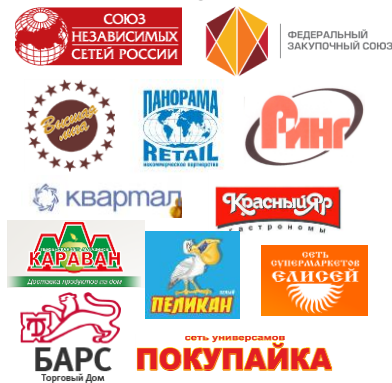
SECTION III. KEY EVENTS AND PLANS OF MAJOR FMCG CHAINS

- The section contains a structural description of more than 200 FMCG retail chains in Russia (including the chains of the Independent chains Union of Russia), the largest online retailers (Utkonos and Ozon), chains that are in the process of business collapse, bankrupt, and chains that ceased operations in 2018)
 - Contact information and management;
 - **NEW Regional presence**
 - Chain development (number of stores and selling space, strategy, plans, etc.);
 - Results and expectations (data of the reporting of public companies, INFOLine estimates);
 - Investment activities
 - Planned and actual opening and closing of stores by formats;
 - New formats and projects;
 - M&A deals;
 - Appointments and resignations;
 - Logistics: indicators and plans;
 - Private label and own production;
 - Interaction with consumers and suppliers;
 - Corporate events.

More than 200 FMCG retail chains in Russia



Independent chains Union and Federal Purchasing Alliance members



Companies that ceased operations in 2018



ANALYTICAL DATABASE "700 FMCG RETAIL CHAINS OF THE RF" - 2018

Extended version

Standard version

Release date: **May 2018 (update May 2019)**Number of pages: **530**Versions: **Standard / Extended**Report language: **Russian / English (on request)**Grant Format: **PDF**Price: **RUB 80 000**

Contents

- State of FMCG retail market of Russia
- Rating of TOP-50 (TOP-100 in the extended version) largest FMCG retailers (and also TOP-10 retail chains of filling stations and TOP-20 specialized retail chains)
- Description of the main formats of FMCG chain retail
- Database "700 retail chains and 600 warehouses of Russia's FMCG retail chains"

Research Benefits

- Macroeconomic indicators dynamics since 2007
- Operational and financial results of the largest FMCG retail chains
- Forecast and development trends of the FMCG retail market in Russia
- Analytical base of operational and financial indicators of 700 Russia's FMCG retail chains viewed by Federal districts, singling out specialized chains and chains of filling stations.

RESEARCH "INFOLINE RETAIL RUSSIA TOP 100. RESULTS OF 2017. TENDENCIES OF 2018. FORECAST UNTIL 2020"



Release date: **August 2018**

Number of pages: **260 (Number of diagrams: 300)**

Grant Format : **Presentation (PDF)+Excel**

Price: **RUB 100 000**

Research structure:

PART I. Retail trade indicators in Russia (7 slides) Macroeconomic indicators of Russia: Dynamics of GDP, investment and industrial production, GDP structure by economic activity, dynamics of retail trade turnover, financial condition of households, distribution of population by per capita income, market structure and level of retail trade consolidation.

PART II. Rating of the largest retailers INFOLine Retail Russia TOP-100 (18 slides) The structure of the retail market in Russia and the forecast for 2020. INFOLine Retail Russia TOP-100 rating indicators: 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 and dynamics of sales density, financial indicators, the fastest growing and fastest-falling networks, rating of networks by online-sales.

PART III. Expectations of the consumer market dynamics (8 slides) Sales dynamics of the largest providers of FMCG and DIY, the share of sales of the largest suppliers via retail chains of the segment, Internet sales of the largest suppliers, the interaction of the largest suppliers with retail chains.

PART IV. The largest M&A deals in the retail market (8 slides) Analysis of consolidation processes and description of M&A deals implemented in 2017-2018 in the segments: FMCG, DIY&Household and furniture, fashion, appliances, computer equipment and mobile devices, cosmetics, perfumery stores and drogeries, baby products, pharmacies and online.

PART V. Appointments and resignations on the retail market (8 slides) Appointments and resignations of key top managers of retail companies in the segments: FMCG, DIY&Household and furniture, fashion, appliances, computer equipment and mobile devices, cosmetics, perfumery stores and drogeries, baby products, pharmacies and online.

PART VI. Development of online trade (4 slides) Key events in the development of online trade in 2017-2018, that can influence the development of offline chains in the segments: FMCG, DIY&Household and furniture, fashion, appliances, computer equipment and mobile devices, cosmetics, perfumery stores and drogeries, baby products and pharmacies.

PART VII. TOP-100 largest retail chains in Russia (203 slides) 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.

RESEARCH "FOOD RETAIL OF RUSSIA. RESULTS OF 2017. TENDENCIES OF 2018. FORECAST TILL 2020"



- ОСНОВНЫЕ ПОКАЗАТЕЛИ РОЗНИЧНОЙ ТОРГОВЛИ
- КЛЮЧЕВЫЕ СОБЫТИЯ РОЗНИЧНОЙ ТОРГОВЛИ FMCG
- РЕЙТИНГИ КОМПАНИЙ РОЗНИЧНОЙ ТОРГОВЛИ FMCG
- ПРОГНОЗ РАЗВИТИЯ РОЗНИЧНОЙ ТОРГОВЛИ FMCG
- КОНЪЮНКТУРНЫЙ ОПРОС ПОСТАВЩИКОВ FMCG

Release date: **April 2018**Number of pages: **126 (Number of diagrams: 152)**Report language: **Russian / English**Grant Format : **Presentation (PDF)**Price: **RUB 150 000**

Research structure:

PART I. Retail trade indicators in Russia (7 slides) Macroeconomic indicators of retail trade: dynamics of turnover and money stock. Structure of retail turnover by categories of products and organizations. Food market inflation. Consumer incomes and expenditures Monetary policy. Consumer expectations and confidence index.

PART II. Key events for FMCG retail (20 slides) Government regulation of retail trade. Key events and activity of international companies on the Russian market. Quality inspection of consumer products.

PART III. Indicators of FMCG retail trade (38 slides) Dynamics and structure of the market, the share of the largest players, the number of objects and retail space of retailers (based on a sample of TOP-200 retailers FMCG Russia), the dynamics and forecast of investment activity, trends and prospects. Ratings by revenue, by retail space, divided by trade formats, development prospects of the largest retailers. Development of online trade, wholesale trade, delivery services by FMCG retail chains. Commissioning of distribution centers, M&A deals, appointments and resignations.

PART IV. Market survey of the largest FMCG suppliers (4 slides) Dynamics of sales of the largest FMCG suppliers, the share of sales of the largest suppliers via FMCG segment retail chains. Development of companies and government regulation. Interaction of the leading suppliers with FMCG chains.

PART V. Russia's largest FMCG retail chains (26 slides) Operational, financial indicators, regional presence, key events and development plans of the TOP-8 FMCG chains of Russia (X5 Retail Group, Magnit, Auchan Retail Russia, GK DIXY, Lenta, Metro Cash&Carry, GK O'KEY, Globus) and three leaders of the segments (Krasnoye&Beloe - alcohol, VkusVill and Izbenka - natural products, Svetofor - hard discounters).

PART VI. Regional development of FMCG retail trade (9 slides) Regional structure of retail turnover, food and non-food. Ratings of FMCG retail chains in 8 Federal districts.

PART VII. The condition of the shopping centers markets (11 slides) Main indicators of the shopping centers market, the largest shopping centers commissioned, the rating of the shopping center owners, key events of the industry, investment projects at initial stages of construction, news of the largest projects being realized.

PART VIII. Forecast for the development of Food retail trade (7 slides) Scenario conditions and indicators of Russia's economic development in 2018-2020, scenarios of Food retail development, elaborated by INFOline, 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.

RESEARCH "NON-FOOD RETAIL OF RUSSIA. RESULTS OF 2017. TENDENCIES OF 2018. FORECAST TILL 2020"



- ОСНОВНЫЕ ПОКАЗАТЕЛИ РОЗНИЧНОЙ ТОРГОВЛИ
- КЛЮЧЕВЫЕ СОБЫТИЯ РОЗНИЧНОЙ ТОРГОВЛИ NON-FOOD
- РЕЙТИНГИ КОМПАНИЙ РОЗНИЧНОЙ ТОРГОВЛИ NON-FOOD
- ПРОГНОЗ РАЗВИТИЯ РОЗНИЧНОЙ ТОРГОВЛИ NON-FOOD

Research structure:

PART I. Retail trade indicators (7 slides) Macroeconomic indicators of retail trade, dynamics of turnover and money supply. Structure of retail turnover by categories of products and organizations. Regional structure of retail trade turnover. Food and non-food market inflation. Consumer incomes and expenditures Monetary policy. Consumer expectations and confidence index.

PART II. State regulation of retail trade (13 slides) State regulation of FMCG and Non-Food retail. Quality inspection of consumer products.

PART III. Situation in selected segments (71 slides) Dynamics and capacity of the market, tendencies and prospects of development, forecasts for the market segments (DIY&Household and furniture, appliances, computers and mobile devices, fashion and baby products, cosmetics and drogerie, pharmacy segment, online trade). Also, for each segment there are ratings of retail chains (by revenue, number of stores, retail space) and prospects for the development of the largest retailers. Description of key events in the industry: development of logistics systems and distribution centers, M&A deals, appointments and resignations, rebranding and development of new formats.

PART IV. Market survey of the largest DIY suppliers (4 slides) Dynamics of sales of the largest DIY suppliers, the share of sales of the largest suppliers via DIY retail chains. Development of companies and government regulation. Interaction of the leading suppliers with DIY retail chains.

PART V. The state of the shopping centers market (12 slides) Main indicators of the shopping centers market, the largest shopping centers commissioned, the rating of the shopping center owners, key events of the industry, investment projects at initial stages of construction, news of the largest projects being realized.

PART VI. Forecast of non-Food retail turnover by segments in 2018-2020 (7 slides) Scenario conditions and indicators of economic development of Russia in 2018-2020, scenarios of non-Food retail trade development elaborated by INFOLine specialists, forecast of income and expenditure dynamics of the population, forecast of retail trade turnover, forecast of non-Food retail trade turnover by segments: (DIY&Household and furniture, appliances, computers and mobile devices, fashion and baby products, cosmetics and drogerie, pharmacy segment, online trade).

Release date: **May 2018**

Number of pages: **120 (Number of diagrams: 81)**

Report language: **Russian / English**

Grant Format : **Presentation (PDF)**

Price: **RUB 150 000**



PRESENTATION CONTAINS ANALYSIS AND FORECAST

POSM market dynamics and forecast

POSM market segmentation

POSM vendor selection methods

POSM performance estimation

POSM market trends analysis

State and forecast of Russia's FMCG retail market

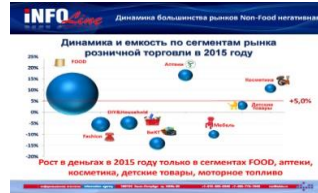
Release date: **June 2017**

Number of pages: **111**

Report language: **Russian / English**

Grant Format: **Presentation (PDF)**

Price: **RUB 150 000**



PRESENTATION CONTAINS ANALYSIS AND FORECAST

Macroeconomic Retail trade indicators

Government regulation of retailing

Consumer incomes and expenditures, loans and deposits

Consumer expectations and confidence index

Development of the largest FMCG chains in Russia

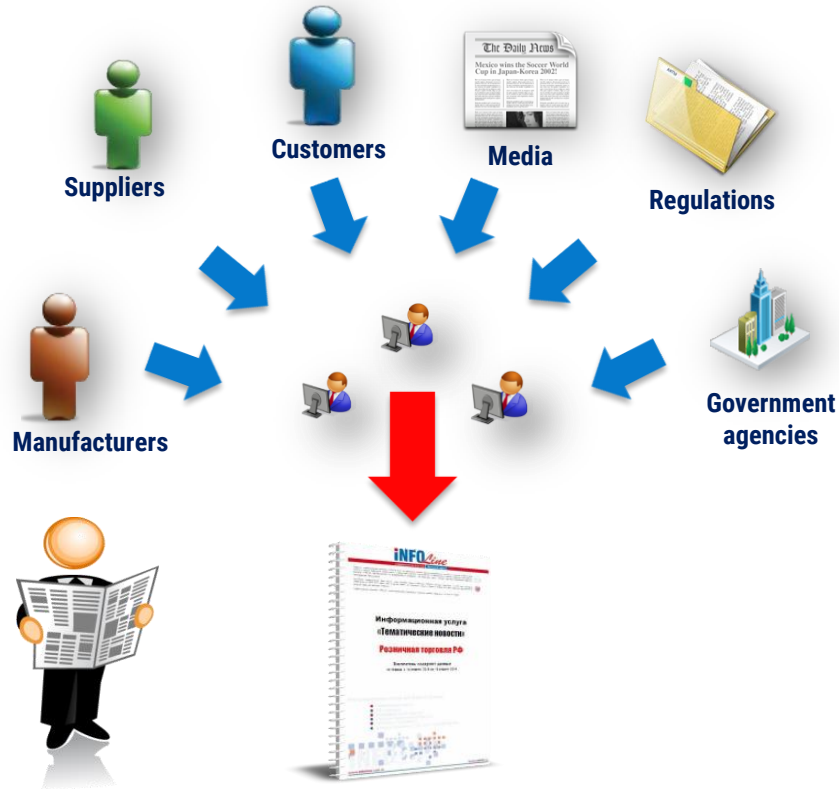
Grant Format: **Presentation (Power Point)**

Report language: **Russian / English**

Number of slides: **from 60 (quarterly)**

Price: **from RUB 100 000**

INDUSTRY NEWS "NEWS OF RETAIL IN THE RF"



Operational information about the state of the Russian retail market

- General news of the Russian economy and retail trade
- **Government regulation**
- Regional News
- **Industry Events**
- FMCG chains news, catering, DIY, Household, household appliances and electronics, mobile electronics, fashion, pharmacy market, children's goods market, cosmetics, perfumes and household chemicals, book trade, sports goods and jewelry chains
- **IT and network automation**
- General, regional and retail property news
- **Logistics news**

Frequency - from 1 time per day to 1 time per month

- ✓ Information on Russia as a whole and on districts
- ✓ **Contact details of market participants**
- ✓ Key materials are highlighted graphically.
- ✓ **Over 5,000 analyzed sources**
- ✓ Unique technologies for collecting and providing information

ECONOMIC AND KEY INDUSTRY REVIEWS



INDUSTRY REVIEWS:

- "Russian construction industry"
- "Russian transport industry"
- "Agro-industrial complex" and "Food production"
- "Russian Fuel and Energy Complex"
- "Russian consumer market and FMCG retail chains rating"

- **New!** In 2017 INFOLine has presented a series of the industry studies, which, apart from a detailed analysis of the industry's development include: ratings of the companies, analysis of foreign trade activities, description of the largest M&A deals, analysis of state regulation changes, dynamics of industries development in the last 5 years and forecast for development of industries in 2018-2020, and some other elements, necessary for understanding the current situation and prospects.
- **New!** The studies are released in a convenient electronic presentation format: an optimal combination of key conclusions and abstracts, graphic materials (more than 1000 figures, diagrams, tables), as well as hyperlinks to the most important regulatory documents and companies' websites. The materials are available in English.
- **New!** Unified (by method and structure) set of 7 (!) research covers all key sectors and markets of the Russian economy. The reviews include a scenario and development outlook for the next three years.

Special offer: **You can get a short version of the research concerning one of the industries you are interested in FOR FREE**, just e-mail a request to: mail@infoline.spb.ru or contact us by phones: +7(812) 322-68-48, +7(495) 772-7640.

COMPLEX LINE OF RESEARCH AND REVIEWS OF RUSSIAN RETAIL TRADE

INFOLine Retail Russia TOP-100

Food and Non-food retail of Russia. Results of 2017. Forecast till 2020

Analytical Database: 700 FMCG retail chains of the RF (standard and extended versions)

Research "DIY Market. Trends of 2018. Forecast until 2020" (standard and extended versions)

Market of Advertising Materials at Points of Sale in Russia: Results of 2018 and Forecasts for 2019-2020

Production of food and beverages in the Russian Federation: Prospects for development till 2020



Information agency INFOLine also conducts individual research in accordance with your technical task.

For individual research, you can email to retail@advis.ru or phone +7(812)322-68-48 или +7(495)772-76-40

About INFOLine



At present, the need for monitoring and analysis of industry and General economic events in the Russian Federation and the world has become more urgent for companies than ever. The solution of this problem is impossible without a professional and highly effective information Department.

INFOLine is **Your information Department**, which will work for the benefit and development of your business, the services of which will be available to all employees of your company.

INFOLine is an independent company which operates in the market research of various industries of the Russian Federation from 2001. Conducted by INFOLine specialists in 2001-2018 studies of investment processes in various sectors of the economy are **highly appreciated** by numerous customers and partners and are **effectively used** by them in their work.

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Thank you for your attention!