

In 2007 the analytical materials of INFOLine information agency were worthily appraised by the leading European companies. In 2007 the analytical materials of INFOLine information agency were worthily appraised by the leading European companies. INFOLine agency was admitted to ESOMAR, the consolidated association of consulting and marketing agencies of the world. According to the regulations of the association, all materials of INFOLine agency are certified according to Eurostandards; this insures the quality of materials received by our customers and availability of after sales services through additional consulting on customers' request.

## Database

# 550 FMCG Retail Chains of Russia

### (concise version)

### DEMO-VERSION



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### Facts about INFOLine information agency

INFOLine information agency was established in 1999, its aim was to render information and advisory services to commercial organizations.

The agency renders permanent information support to more than 1000

companies in Russia and world-wide. On daily basis INFOLine IA monitors publications in more than 5 000 MSM and carries out analytical research according to 80 subjects related to RF economy. Since 2003 INFOLine IA has been conducting various desk researches of the markets both on the customer's request and on the Agency's own initiative. When working on a market research, the Agency's analysts make extensive use of their unique data support and their years-long experience of operating various data flows.

**INFO**Line

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The research reports and surveys of INFOLine IA are used in their activities by **largest FMCG retailers** (X5 Retail Group, Magnit, Auchan, Metro Cash & Carry, Lenta, O'Key), **producers** (Procter & Gamble, Coca-Cola, Pepsi, SABMiller, Fazer, Philip Morris, Mars), **distributors** (Megapolis GC), financial (Uralsib FC, MDM-Bank) and **service** companies (GC Service-Plus, Wincor-Nixdorf).

For additional information you are welcome to visit our sites at [www.infoline.spb.ru](http://www.infoline.spb.ru) and [www.advis.ru](http://www.advis.ru)

## About 550 FMCG Retail Chains of Russia Database (concise version)

Together with growing share of store chains in the sales volume of retail trade in Russia the information products that provide balanced combination of news and analytical surveys dealing with the development of Russian retail market, as well as databases, become more and more of urgent interest. In the context of its information services range expansion during 2002-2012 INFOLine IA presented the following package of information products:

- 2002– [Branch news: Retail chains](#)
- 2004 – information portal [www.advis.ru](http://www.advis.ru) with traffic of more than 12 thousand visitors a day. The subject of [Retail chains](#) is one of the most popular at the portal
- First quarter of 2009 – a monthly industry survey [Rating of FMCG retail chains in Russia](#), and in 2011 there was introduced an English version of this product, [Rating of FMCG retailers of Russia](#) in which the analysts of INFOLine IA monitor and publish in real-time mode the dynamics of main key figures of the industry (sales, number of stores and trading floorspace) for **100** of biggest retailers in Russia
- Third quarter of 2011 – [Private Labels of FMCG chains in Russia, Trends of 2011, Prognosis till 2015 Research](#), which systematizes the data on types of PL, their development directions and strategies, evolution stages of approaches to creation of PL at global and Russian markets, presents a full classification of PLs by a vast list of criteria, contains analysis of the economic crisis influence on the world consumer goods market, describes the latest trends of PL market development in Russia and the world, analyses changes in consumption of FMCG by product groups and lines, formulates prognosis for 2012-2015. It also contains an estimation of PL segments development potential at the Russian FMCG market till 2015
- First quarter of 2012 – [INFOLine Developer Russia TOP-100 Research](#), which gives description of the commercial real estate market situation in Russia in 32 cities and regional areas of Russia, contains comparative analysis of shopping centers market of 32 cities and regional areas of Russia, presents a prognosis of shopping centers market development till 201, as well as the Rating of 100 largest owners of shopping centers of Russia – INFOLine Developer Russia TOP-100. At the same time specialists of INFOLine IA ranked the cities of Russia by aggregate volume of total and rentable floorspace in shopping centers, as well as by the per capita level of saturation with total floorspace in shopping centers. The unique database of shopping centers of Russia, both operating and being constructed, which includes over 2300 facilities, became the information basis for the Research.
- First quarter of 2012 – [DIY Retail Trade in Russia, Results of 2011 and Prognosis till 2015 Research](#), with description of the current condition and development outlooks for DIY and Household retail trade in Russia, description of main trends and key operational indicators of DIY and household goods retail chains development, rating of the largest DIY and Household chains, business-references on TOP-20 of the largest DIY and Household retailers of Russia, as well as a data base of 170 DIY and Household retailers of Russia.
- Fourth quarter of 2012 – [Retail Trade in Russia, Trends of 2012 and Prognosis till 2015](#), which presents dynamics of the key indicators of retail trade in RF, dynamics of the key indexes in the aggregate of TOP largest FMCG chains of Russia, ratings of TOP largest FMCG chains of Russia by their operational and financial indicators, efficiency, logistics, personnel and PL, survey of the shopping centers market of Russia and unorganized retail, description of the key formats of retail trade (hypermarket, supermarket, discounter, convenience store and online stores), characteristic features of consumers behavior and preferences. The research also contains structured information about the development of more than 150 retail chains, M&A deals, activities results and investment plans, operational indicators for the first half of 2012 and blocks of news as of 9 months of 2012.
- Fourth quarter of 2012 – [INFOLine Retailer Russia TOP-100 Research](#), which contains dynamics of the key performance indicators of retail trade in RF, dynamics of key indicators for TOP-100 in general, market surveys of FMCG, home appliances and electronics, DIY and Household, mobile devices, perfumery and cosmetics, fashion and children's products. The research also contains structured information about the development of retail chains, M&A deals and investment plans.

**Database of 550 Retail FMCG of Russia (concise version)** consists of 2 sections:

- **Section 1. Condition of the FMCG retail market in Russia**, which contains description of the main macroeconomic indicators of retail trade and largest retail chains, history, current condition and development outlooks of FMCG retail in Russia, six ratings of chains ranked according to operational indicators (number of stores, total trading floorspace, number of personnel and distribution centers), financial (revenue) and efficiency (revenue per one square meter) indicators, logistics and personnel of TOP largest FMCG retailers in Russia.
- **Section 2. Database of 550 FMCG Chains and 450 Distribution Centers of Russia**, which is intended for optimization of interaction with retail chains, includes the following fields:
  - Chain's brand
  - Legal name
  - Chain's management
    - Chief Executive Officer
    - Chief Financial Officer
    - Chief Procurement Officer

- Chief Information Officer
- Actual address
- Phone
- Fax
- E-mail
- Web site
- Formats developed (hypermarket, supermarket, convenience store, discounter)
- Total number of the chain's stores as of 01 January 2013
- Number of stores as of 01 January 2013 in terms of formats (hypermarkets, supermarkets, convenience stores);
- Total trading floorspace of the chain's stores as of 01 January 2013
- Net revenue (without VAT) of the retail chain in 2010-2012, billion roubles
- Regional representativeness (regional areas and cities in which the chain's stores are situated, including the number of stores)
- Number of DCs as of 01 January 2013
- Total floorspace of DCs as of 01 January 2013
- Regional representativeness of DCs as of 01 January 2013

**FMCG chains of Russia, included into the database (all in all 550 chains):** 4 Sezona, Apelsin, Ekonom (Tverskoy Produkt, LLC); Glavprodukt (GC Glavprodukt (Glavprodukt Plyus, LLC, Glavprodukt, LLC)); 7 Kopeek, Matur (Sintez, LLC); 7Semerka (7Semerka, LLC); Narodnaya 7Ya, IdeYa, Spar (TH Intertorg, LLC); Atac (Atac Russia, LLC); Auchan (Auchan, LLC); Billa (formerly also BIOP) (Billa, LLC); EURO (Ster, LLC); Globus (Hyperglobus, LLC); Metro C&C (Metro Cash & Carry, LLC); Prisma (Prisma, LLC); Real (Real-Hypermarket, LLC); Selgros C&C (Selgros, LLC); Seven (AmiKo, LLC); Spar, Eurospar (Produkt Servis, LLC and others (Spar Middle Volga, LLC)); Spar (Spar Tula, LLC); Spar (Spar Retail, CJSC and others); Spar (Spar Povolzhye, CJSC); Spar (SVA Trading, CJSC (Spar Vostok, LLC)); S-class, Delis (Negotsiant+, LLC); ABK (Vegat Plyus, CJSC); Abrikos, Lama, Food-City (Lama Plyus, LLC; Tomretail, LLC); Absolute (TH Absolute, LLC); Absolute Cash & Carry (Absolute, LLC and others); Adept, Novgorodskiy Bacon (Adept, CJSC); Avoska (Avoska-dva, LLC); Azbuka Vkusa (Gorodskoy supermarket, LLC); Aygul (Aygul, LLC); Aikai, Groshel, Lukomorye, Lukoshko, Minimarket (Aikai, LLC); Aktay (Apaz, PO); Alex, Gastronomchik (TK Alex, LLC); Alekseevskiy (Alekseevskiy, GUSP); Alice (IE Golyshev D. Yu.; TH Alice, LLC; Supermarket Alice, LLC; Universam Alice, LLC); Almi, Zakrama (Elaks, LLC); Altynay (TF Altynay, LLC); Alie Parusa, Eliseevskiy (Supermarket Alie Parusa, LLC); Albatross (Valkor, LLC; AlphaMarket, LLC; Kalinka Renaissance, LLC); AMK, Prostor (Megatorg, LLC); Aniks, Bravo (TH Aniks, LLC); Korzinka, Korzinka-mini (Prayd-A, LLC); Antares (Antares, LLC); Apex-plus (Apex-plus, LLC); Aprodukt (TS Atlant, LLC); Gastronom-21 (former Aristey-Impeks) (many); Aromatniy Mir (Aroma Market, LLC); Augustina (Augustina, LLC; Arslan, LLC); Artemida-Don (Artemida-Don, LLC); Arish Mae (Firma Tansu, LLC); Assorti (TH Assorti, LLC); Assorti (Nizhniy Novgorod) (Assorti, LLC); Assorti Produkty (Rostok, LLC); Assorti Trading, Assorti Alyans, LLC; Assorti, LLC); Assorti, Ekonom (Rep. Komi) (Assorti, CJSC); Astor (Astor, CJSC); Atrus (Atrus, LLC); Ayavrik (Ayavrik, LLC); Bayram (TorgMaster, LLC); Bars (TH Bars, LLC); Barybinets (Barybinets, LLC); Bahetle (Bahetle-1, LLC); Bashspirt (TH Bashspirt, LLC); Begemot (TH Kolibri, LLC); Bezhin Lug (Bezhin Lug, LLC); Best-Market (Best-Market, LLC); Bim (BiM, LLC); BMK i K (TPF BMK i K, CJSC); Borodino (Torg Plast, LLC); Bravo, Pchelka (Pchelka, LLC); TH Borodinskiy (ORTP 2010, LLC); Food Store, LLC; Noviy Ambar, LLC; Kaufholl, LLC); Mosmart, Mosmart-Maxi, Spar (Partner market, LLC); Brat (Brat, LLC); Butovo MZHK, Vkusnov (TH MZHK Butovo, LLC; Vkusnov, LLC); Bystronom, Santimo (Megatorg, LLC); V Desyatku (TH Slastena, LLC); V Desyatochku (TH Voronezhskiy-2000, LLC); Lyubimiy (IE Ivanova E.N.); Gastronomir (Gastronomir, LLC); Accept (Accept, LLC); 5 Zvezd, Produkt (TK 5 Zvezd, IE Kozlova); Romashka (TK Produkty, LLC); Fresco 24 (former Slavniy) (Repeshok, LLC; GraviLat, LLC); Afanasiy (IE Gavrilov S. N.); Dobryachok (Format Trading, LLC, IE Matushkin I. O.); Prodtovary (Prodtovary, CJSC); Vulcan (Roznichniy Standart, LLC); Ranyusha (Ranyusha, LLC); Severnoe Siyanie (Severnoe Siyanie, LLC); Vamin (Vamin Tatarstan, JSC); Avers (Avers, LLC); Karavay (TH Karavay, LLC); Ros (Ros, LLC); Yuzhniy Dvor (Yuzhniy Dvor, LLC); Vladimir Ivanovich (Maxwell, LLC); Lakomka (Vladhleb, JSC); Vector (Vector PKF, LLC); Katyusha (Katyusha, LLC); Vavilon (Vavilon, LLC); Vek (Vek, LLC); Velem (Velem, LLC); Velikolukskiy Myasokombinat (Torgograd, LLC and others.); Vershina (Firma Opt-Torg, LLC); Vesta (TK Vesta-SA, LLC); Vesta (Vesta-Plyus, LLC); Vester, Sosed (GC Vester (Vester-Regiony, LLC)); Vial-Trade (Vial-Trade, LLC); Vivat, Delta (Vivat-Trade, LLC; Delta-trade, LLC); VIK (VIK, LLC); Victoria, Deshevo, Kvartal, Cash (Diksi Group, JSC (former GC Victoria, JSC)); Vinoteka, Negotiant (Negotiant, LLC); Vityaz-Torg (Vityaz-Torg, LLC); VL-Mart (VL-Mart, LLC); Vozmi Vse Srazu

(Vozmi Vse Srazu, LLC); Volshebniy Aromat (IE Muhacheva E.L.); Volniy Kupets, Telezhka, Tverskoy Kupets (Ritm-2000, LLC); Vprok (Astrid, LLC); Vse v Rozochkah, Dobryak, Samberi, Ekonomych (Vizit-1, LLC; ABI Group, CJSC); Vse Na Svete, Globus, Urzhumka, Vino (Globus Plus, LLC); VTA-Resurs (VTA-Resource, LLC); Vygodniy (Optimal, LLC); Vysshaya Liga, Liga-Markt, Tsenorez, Apelsin, Extra-Ekonom (TG Vysshaya Liga, LLC; Vysshaya liga, CJSC); Gastronom (Gastronom, LLC); Gastronom 811, Tsentralnye Bulochnye (Tsentralnye Bulochnye, LLC); Geomart (Geomart-Retail, LLC); Georgiy (Georgiy, CJSC); Germa (Germa, LLC); Gildiya (TK Gildiya, LLC); Glavmag, Extra (Extra, CJSC; Extra-Premium, LLC); Globus (Ulyanovsk) (Globus Torg, LLC); Globus Gurme (Stolichnaya Torgovaya Kompaniya, LLC); Gorod Izobiliya (TH Gorod Izobiliya, LLC); Gorozhanka, Megas, Sibirskiy Gigant (Trading holding Sibirskiy Gigant, LLC); Gorodok, Pogrebok (Kaspiy-Retail, LLC); Grand (Grand, LLC); Grozd (Tsentr Restrukturizatsii, LLC); Grosfood, Na 7 Vetra, Universal, Rosbi Vostok (Rosbi+, LLC (ROSBI+ Group of Companies)); Gulliver (Gulliver, CJSC); Gurman (Gurman, LLC); Gurman, MAN, Plyus, Superman, MiniMAN (Man, LLC); Gurman (Gurman, CJSC); Gurman, Nash, Nash-Express (GC Universal, LLC); XL (Retail Severo-Zapad, LLC; Dayana, LLC); Derzhava (Derzhava, LLC); Desyatka, Big Si (IE Popov M.G.); Defa (Defa, LLC); Dieta 18, Prosper (Dieta-18, CJSC); Diksi, Megamart, Minimart (Diksi Group, JSC); Diksika (TS Diksika, LLC); Disko, SemYa (SemYa, LLC (Perm)); Disma, Pyat Shagov, Sigma, U Doma, Romashka (Nekommercheskoe parterstvo Torgovyh Predpriyatiy Panorama Retail (Vinkom, LLC)); Dobronom (TK Dobronom, LLC); Dobriy Den (Firma YuSA, LLC); Dobrynya (Dobrynya, LLC); Dom Edy (Dom Edy, CJSC); Dostupnye Produkty (Dostupnye Produkty, LLC); E.D.A. (Bakaleyа tochka ru, LLC); Europe (Europe, LLC (Kursk)); Evroros, Tvoy (TH EvroNord, LLC); SPM (SPM+-Plyus, LLC (directly SPM)); Pochta Rossii (FGUP Pochta Rossii); Pochtoviy Magazin (Edinaya Roznichnaya Kompaniya, LLC); Egoryevskiy (TI Egoryevskiy); Elisey (Elisey, LLC); Elisey, Zarya, Oktyabrskiy, Prospekt, Rodina, Rassvet, Sadko, Sibirskiy (Vizit, LLC, IE Motorin B.A.); Eliseyskiy (Eliseyskie Magaziny, JSC); Ermak (Sport-Torg, LLC); EST, Mag-Mak (Roznichnaya Set Dinskie Kolbasy, LLC); Zyeleznodorozhnaya Torgovaya kompaniya (Zheleznodorozhnaya Torgovaya Kompaniya, JSC); Zhuravli (Retail, LLC); Zakamyе, Temle (Torgoviy Dom Duslyk, LLC); Zvezdniy (Universam Zvezdniy, LLC); Zeleniy Ostrov (Promtorgresurs, LLC; Vestprod, LLC; Sbytorg, LLC; Foodsretail, LLC); Izht trading, Tri Banana (Izht trading, LLC); Imperia Produktov, Fresh (TH Mega-Don, LLC); Impuls (Impuls, LLC); Invet (Invet, LLC); Kayros (Kayros, LLC); Kalinka (Kalinka, LLC); Kamilla (TH Kamilla, LLC); Kapriz (Solnechniy Mir LLC; Fon-market LLC); Karavay, Spar (franchise) (Karavay-RS, LLC); Karavay, Kolos, Niva (Karavay, LLC; Kolos, LLC; Niva, LLC); Karavan (Karavan, LLC); Karusel, Pyaterochka Maxi (TH Perekrestok, CJSC); Kaufman, Mir Vkusa, Galereya Chizhova (Vendor, LLC); Kvartal (Ambitus, LLC); Kvartal (Kvartal, LLC); Kvartet (Kvartet, LLC); Kir 24 (Upravlyayushchaya Kompaniya Prolog, LLC); Kirovskiy (Lev, LLC and others.); Klass (Polufabrikaty Klass, LLC); Klondike (Sovin i K, LLC); Kolbaskin i Ogurchikov (Soyuz, LLC); Kolobok (Kolobok, LLC); Komandor, Alleya (Elita-98, LLC); Titan, Tinan Ekonom (Kompaniya Titan, LLC); Kontinent Vkusa, Kontinent (Produkty, LLC); Produkty (Cooperator, Potrebitel'skoe Obshchestvo); Cooptorg (Cooptorg, LLC; Cooptorg-plus, LLC); Kopeika, Radna (Kopeika, LLC (GK Rosbi)); Cora, Palata, Sibiriada, Holiday Classic, Chervonets (GK Holiday, LLC; Kompaniya Holiday, LLC; Cora-TK, LLC); Kraslestorg (Kraslestorg, JSC); Krasnogorskiy (TH Krasnogorskiy, LLC); Krasniy Yar (Torgoviy Soyuz, LLC (former Eniseyskaya Torgovaya Kompaniya, JSC)); Credo (Credo, LLC); Krestovskiy (KK Torgoviy Dom, LLC); Kupets (Elittorg, LLC); Kupets (Kupets, LLC); Kupets (Stroy Fin Torg, LLC); Kuriko (Ptitseprom, LLC); Magazin (former Lavina) (Magazin, LLC); Lakmin (TK Lakmin, LLC); Lenta (Lenta, LLC); LetLend (Standart-Alko, LLC (former TK Letlend, LLC)); Liniya (Grinn Corporation, CJSC); Lipka (Lipka, LLC); Lotos, Sigma, Gurman, Lotos Gurman (Torgoviy holding Lotos, LLC); LotosM (Lotos-retail, LLC); Lukoshko (Lukoshko +, LLC); Lukoshko (Severo-Zapadnaya Torgovaya Gruppya, LLC); Lend (Lend, CJSC); Lyubimye Produkty, 7 Dney (TH Melifaro, LLC); Lyubimye Produkty, Modern (Opt-Torg, LLC); Lyubimiy Magazin (Lyubimiy Magazin, LLC); Lyady (Lyady, JSC); Magazin, Prodtovary (PK Luch); Magazin Moego Rayona, Prospekt, Slava, Yuzhniy, Vostok, Dva Gusya (Magazin Moego Rayona, LLC); Magic (RTS Magic, LLC); Magnit (Magnit, JSC (Tander, CJSC)); Magnolia (T i K Produkty, CJSC); Magnum (M1, LLC); Makarovskiy (Makarov i kompaniya, LLC); Max City (Cityavtoservis, LLC); Maxi, Mini (Maxi, LLC); Maximum (Maximum, LLC); Maria-Ra (Roznitsa-1, LLC and others.); Mayak-1 (Mayak-1, LLC); Matritsa (Universal-Trading, LLC); Medunitsa (Medunitsa, LLC); Mera (Vest, LLC); Meridian (TS Meridian); Meridian (Retail-Garant, LLC); Petrovich (Merkuriy, LLC); Merkuriy (Samara) (MPR, LLC); Metallurg (Sotsialniy Kompleks, LLC); Metatr (Metatr, LLC); Mikey (MTK, LLC); Mechta (IE Mangasaryan); Miko (Miko-Roznitsa, LLC); Milart (TTS Na Bakinskoy, LLC); Mindal (TH Mindal', LLC); Milena (Milena, LLC); Minima (Vash Shans LTD, LLC); Mir Prodovol'stviya (Mir Prodovol'stviya, LLC); Mir Produktov (Mirovye Produkty, LLC); Kontinent,

Ekonom, Norma, Apelsin (Mir produktov, LLC); Mikhailovskiy (-); Mishka na Severe, Mishutka, Atlant, Bely Medved (Bely Medved, LLC); Achilles (TK Achilles, LLC; TH Achilles, LLC); TH Pokotorg, LLC (TH Pokotorg, LLC); PKF Simvol, LLC (PKF Simvol, LLC); Biryuza, LLC, IE Kimchenko (Biryuza, LLC, IE Kimchenko); Modul (Modul, LLC); Moy Magazin (Grand-Trade M, LLC); Molniya, Spar (franchise) (Moll, LLC); Monetka (franchise) (Investproekt, LLC); Monetka, Monetka Super, Wright (Element-Trade, LLC); Morkov (Minister Melochey, LLC); Mostovskiy, Eskada (Avlanzh, LLC; Lakvenst-T, LLC; Novoe Eldorado, LLC); Myasnov (TSDN Myasnov, LLC); Myasnoy Dvorik, Myasnoy Dom, Myasnaya Karusel, Myasnaya Raduga (Myasnoy Dvorik LLC; Myasnoy dom LLC; Myasnaya Karusel LLC; Myasnaya Raduga LLC.); TF Na Tashkentskoy (TF Na Tashkentskoy, LLC); Nadezhda (Nadezhda, CJSC); Namangan (Namangan, CJSC); Napoleon, Margo (Napoleon, LLC); Dobrynya, Noviy Vek (Druzhba-15, LLC); TK Narodniy (Vek, LLC); Nash Mag, Pchelka (Vympel, LLC (IE Zlobin)); Nash, Sedmoi Kontinent (Sedmoi Kontinent, JSC); Negotiant (Konstantin i K, CJSC); Netto (Nordik-Neva, LLC); Novosibirskaya Ptitsefabrika (UDS, LLC); Noviy Vek, Produkty, Viola (Noviy Vek, LLC); Noviy Produkt (Noviy Produkt, LLC, Sanar 2004, LLC); Norman (Norman, LLC; Norman-Neva, LLC); NTN (Noyabsktorgneft, LLC); Vse Budet OK, Caesar (Progamma, LLC and others.); Ob (Ob, LLC); Ogni Stolitsy (OptPotreb, LLC); O'Key (TS O'Key, LLC); O'Key, O'Key-Ekspress (O'Key, LLC); Olivye (Smart Value Retail, CJSC); Omich i K (Supermarket, LLC); Yarmarka (Naturalnye Produkty, LLC); Orbita (Orbita, LLC); Ostap (Ostap, GK); Otdohni (TSDA Sommelier, LLC); OShA, Petro'L (OShA, LLC); Payba (Inkom, LLC); Pelikan (Neotrade, LLC); Pelikan (Pelikan, LLC); Pensioner (Pensioner, LLC); Perekrestok (TH Perekrestok, CJSC); Perekrestok Ekspress, Kopeika (Ekspress-retail, LLC); Pestrechinka (Azyk, JSC); Picnic, Vini (GC Picnic); Petrovskiy, Petromost (GC Petrovskiy); Peterskoe (Peterskoe, LLC); Plovdiv (Prodoptorg, LLC); Podosinki (Podosinki, CJSC); Podsolnuh (AZS JSC Rosneft) (RN-Moskva, JSC); Pokupay, Eda (Koteks-Torg, LLC); Pokupay-ka (Tandem, LLC); Polushka (Sankt-Peterburg), Lime, E-da! (Lyubavushka, LLC); Polushka (Ufa) (Forward, CJSC); Polyana, Chibis (Sistema Chibis, LLC; RegionMart, CJSC; RegionMart-Tomsk, CJSC; Amik Cash & Carry, LLC); Posadskiy (Shed, LLC); Posyltorg (Viola, LLC); Prazdnichniy (Prazdnichniy, LLC); Privet (Privet-Plus, LLC); Printo (Roznichnaya Set Printo, LLC); Proviant (Proviant-Roznitsa, LLC); Produktovaya Lavka (Lokos, LLC); Produktoviy Rai (Produktoviy Rai, LLC); Produkty (Mikhail, LLC); Produkty 24 Chasa (Partner-Naym, LLC); Produkty VSK (GK VSK); Produkty, Pchelka, SC Karavay, Leemak (L-T, LLC); Prokopyevskiy (Gastronom Prokopyevskiy, LLC; IE Prokopyeva); Proletarskiy (Aron, LLC); Prospekt (Progress, LLC; Uspeh, LLC); Puasson (Puasson, LLC); Pushkinskiy (Magnat LLC; Ruselit i K, LLC); Pchelka, Imperial (Pskovpishcheprom, CJSC); Pchelka, Elite, Caramel (Elite, LLC); Apelsin, Pyatachok (Moskovskaya oblast') (GC Vostok, LLC); Pyatachok (St. Petersburg) (Pyatachok-Amphibia, LLC; Pyatachok Pushistiy, LLC); Pyaterochka (TH Perekrestok, CJSC); Bayram (former Pyaterochka (franchise in Bashkortostan)) (Salyut-Torg, LLC); Pyaterochka (franchise in Volgograd region) (Tamerlan, LLC); Pyaterochka (franchise in Republic of Tatarstan) (Ak Bars Torg, LLC); Pokupochka (former Pyaterochka (franchisee in Samara region)) (Agrotorg-Samara, LLC); Pyaterochka (franchisee in Saratov region) (Volgatorg, LLC); Dvortsoviy Ryad (former Pyaterochka (franchisee in Ulyanovsk region)) (Dvortsoviy Ryad-MS, LLC); Pyaterochka in Perm Territory (Kama-Retail, LLC); Pyatyu-Pyat (former Pyaterochka (franchisee in Voronezh region)) (Visant-Torg, CJSC); Radamir (TH Udmurtpotreboyuz, LLC); Radezh, Ekonom (Radezh, LLC); Raytsentr, Rai Tsen, Tochka (Raytsentr, LLC); Ramos (Ramos, LLC); Rassvet (Rassvet, CJSC); Real (TH Real, LLC); Renata (Renata, LLC); Repka, Eda, Povорот, Nash magazin, Pobeda! (Format, LLC); Riat-Market (Supermarket, LLC); Riomag (Riomarket, LLC); Ring (Ring, LLC); Roznitsa S (Roznitsa S, LLC); Rosinka, Apelsin, Oktyabrskiy, Pallada, Sbergayka, Vse k Stolu (Region-Produkt, LLC; RegionProdukt, LLC); Rossoshanskiy Torg (Rossoshanskiy Torg, CJSC); Rost (Rost, LLC); Rosfood (Kompaniya Rosbi LTD, LLC); Russkaya Troyka (IE Boshzhkov O. P.); Rusmarket (Rusmarket, LLC); Rus, Rostok and others. (SPK im. Krupskoy); Ryabinka (Ryabinka, CJSC); Sadko (Sadko, LLC); Savva Vodochnikov, Russkaya vodka, Erosey (LVZ Habarovskiy, JSC); Samobranka (Yupiter, LLC); Saharniy Lev (TH ORDM, LLC); Sayus (Kompaniya SAYuS, LLC); Svezhie Produkty, Luchi, Indyushkino (Set Magazinov Svezhie Produkty, LLC (former Alpi, JSC)); Sever, Ekonomka, Nograd, Aquatoria (Aquamarket, LLC); Sezon (Style, LLC); Sezon (Primorskoe, LLC); Sezon, Menahem (TH Menahem, LLC); Semirechye (TH Semirechye, LLC); Sem Klyuchey (TS Sem Klyuchey, JSC); SemYa (Volzhskiy) (SemYa-Market, LLC (Volzhskiy)); SemYa (Magnitogorsk) (SemYa, LLC (Magnitogorsk)); SemYa, EKO (Torgoviy Dom SemYa, LLC); Servis-Byt (Servis-Byt, LLC); Shamsa (Shamsa-Holding, LLC); Simbirka (Maksima-H, LLC); Sintorg (Sintorg, LLC); City Gurme (Market, LLC); Citymarket (Citymarket, LLC); Sytno (TH Sytno(Chelyabinsk)); Citystor (Enka SC, LLC); Sytno (TH Sytno, LLC (Ufa)); Sytno (TH Sytno, LLC (Magnitogorsk)); Slavniy, Slata (Mayak, LLC); Slavyanka (Slavyanka, LLC); Slastena (Ufimskiy Hlebokombinat No.1, JSC); Sloboda, Sloboda

Optoviy (Telpas, LLC); Smak (Elinn, LLC); Smak-Gurme (Smak-Gurme, LLC); Solnechniy Krug (TG Solnechniy Krug, LLC and others.); Solnyshko (Solnyshko, LLC); Soltex (Soltex, LLC); Soroka (Soroka Market, LLC); Soroka, Yarmarka (Bolshaya Yarmarka, LLC and others.); Sota (former Intellect Capital/Vtoroy dom LLC) (TH Epsilon, LLC); Socialism (Russkie, LLC); Soyuz (Soyuz-Lastochka, LLC); Soyuz-Servis (Soyuz-Servis, LLC); Stanem Druzyami (Santorg, LLC); Start (TS S, LLC); Status (Status, LLC); Stokmann (Stokmann, CJSC); Stolichniy (Yulena, CJSC); Stomak (Stomak, LLC); Strelets (IE Sereдкиn V.V.); Supersam (Produktoviy Soyuz, LLC); Super-Siva (Renlund SPb, CJSC); SuperCity, Ananas (Samarskaya Assotsiatsiya Roznichnoy Torgovli, LLC); Sphere Produkty (Sphere-Produkty, LLC); Sphere Market (Sphere Market, CJSC); Tabris (TVK-R, LLC); Tamada (Henry i K, LLC); Tamara (HK Fond, CJSC); Tverprodtorg (Tverprodtorg, JSC); Tvoy Dom (Kroteks, CJSC); TDT (TH Tarasova, LLC); TDM (TH Mikhaylova, LLC); Telex (Telex, LLC (Fedorov M.I., IE)); Teorema (Berkut, LLC); Theresa (RTS Theresa, LLC); Teremok (Rosas, LLC); Tesey (Tesey, LLC); Tehnolog (Tehnolog, LLC); Tihookeanskaya TPK (TTPK, CJSC); Tovarishch, Manera, Spar (Tovarishch, LLC); Torex (Torex, LLC); Tochka (Tochka, LLC); Tral-2 (Tral, LLC); Tri Bogatyrya (Firma Tri Bogatyrya, LLC); Tri Bogatyrya (Azimuth, LLC); Tri Tolstyaka (Firma Tri Tolstyaka, LLC); Troyka, SemYa (Troyka, LLC; Dela, LLC); Troya Plyus (Amforma, LLC; Troada, LLC); TF Industrialnaya (TF Industrialnaya, CJSC); Udachniy (Comfort, LLC); Universal (ORT Universal, JSC); Universam Borisovskiy (Universam Borisovskiy, LLC); Universam Udachnyh Pokupok, Leader Ekonomii, Supermarket, Stolichniy, Bahetle, Pravilnoe Pivo (Capital, LLC; Gorodskaya Set Market, LLC); Unysh (Saf, LLC); Urozhay (Alcomir, LLC); Utkonos, Perekrestok-Ekspress (reverse franchise) (Noviy Impuls-50, LLC); Factoriya (Factoriya, LLC); Fantik (TH Tomilino, CJSC); Fix Price (Best Price, LLC); Fili Universam (TRTS Universam FILI, LLC); Ekonom, Tri Bochki (Grape Market-City); Firmennyye Novotritskие Kolbasy (former Ekonom Gastronom) (MD Gastronom, LLC); Flagman (Flagman, LLC); Fortuna Garant (Fortuna Garant, LLC); Fortuna (TH Fortuna Mnogo Drugih); Fresh, Fresh Lite, Nahodka (Evropa, LLC (Sankt-Peterburg)); Foodmarket (Foodmarket, LLC); Hollyfood, Produkty 24 Chasa, Equator, Nizkotsen (Hollyfood, LLC); Horoshee Nastroenie (TH Boston-3, LLC); Holodilnik (Holodilnik, LLC); Tsentrosoyuz (TsentrSoyuz RF); Tsentralniy Gastronom (Tsentralniy Gastronom, CJSC); Tsentrprodservis (Tsentrprodservis, JSC); Tsentrtrorg (Tsentrtrorg, JSC); Chelny-Hleb (TH Chelny-Hleb, LLC); Cherniy Kot (IE Polyakov V.P.); Chicago (Chicago, LLC); Chkalovskiy (TKTS Chkalovskiy, LLC); Shatlyk (TH URS, LLC); Shubinskiy (Shuba, LLC); Edelweiss (Kazanskiy Torgoviy Dom, JSC); Edem (Edem, LLC); Ekonom (Ekonom, LLC); Ekonomka (Ekonomka, LLC); Ekonomniy magazin (Vyatkarostroy, LLC); Elect (Elect, LLC); Elbrus (Elbrus, LLC); Essen (Optovik, LLC); Yunmart (Yunmart, LLC); Yabloko (Yabloko-2000, LLC); Yarmarka (Karlugas, LLC); Naturalnye Produkty, LLC); Premier (TH Premier, LLC); Vkusniy Ostrov (GK Vkusniy Ostrov); Garant XXI (Garant XXI Vek, LLC); Druzhba (TK Druzhba, LLC); Exposhop Cash&Carry (Inter MTD, CJSC); Lira (Lira, LLC); Metropolis (GK Metropolis (Parus, LLC; Aktiv, LLC)); Ral (RAL I Ko LTD, CJSC); Semerochka, Temle (Prodtovary, JSC); Titan (Titan TKPF); Admiral, Desyatochka, Optovik (TH TSVK, LLC); Radost` (Radost`, LLC); Izbenka, VkusVill (Lug da pole, LLC); soseDDushka (IE Pikalov A.A., Sosedushka, LLC); Stolichniy (Vostok, LLC); Kak Syr V Masle (IE Sverdlin A. S.); Samberi (GK Samberi); Semeiniy Capital. Prodovolstvennie Tovary (Semeiniy Capital. Prodovolstvennyye Tovary, LLC); Super Good (Dimart, LLC); Kvartal (Kvartal-Tula, LLC); Labyrinth (Labyrinth, LLC); Lyundik (Serpantin, LLC); Miratorg (APH Miratorg (Miratorg, LLC)); Citymarket, Gurman (TK KTK, CJSC); 7 Shagov (no single entity); Saharok, Kuvshinka (Saharok, LLC; Saharok Plus, LLC; Prodmarket, LLC; IE Meshkova O.V.; IE Tihonov S.G.; IE Malov G.I.; Lukoshko, LLC; Brigantina, LLC); Zolotoy Klyuchik (Zolotoy Klyuchik, LLC); Gurman (many (IE Serkova Z.A, Loza, LLC)); Mango (Vaktorg, LLC); Torgovaya Liga (Torgovaya Liga, CJSC); Bimart (Bimart, CJSC); Varyag, Produkty, Sam Kupil (IE Volper A.V.); Bereg (Lion-Trade, LLC); Lavash (PK Lavash, LLC); Extra (Extra, CJSC); Ermak (IE Vdovin V.L., TH Ermak, LLC); Rosvkus (TH OPT, LLC); Alleya (Prodinvest, LLC); Helena (Helena, LLC); Hercules, LLC (Hercules, LLC); Exposhop (Inter MTD, CJSC); Podsolnuh (RN-Moskva, JSC); Sgomon (GK Sgomon); Beryozka (Beryozka-Plus, LLC); Avoska (Kaskad-Trade, LLC); Ya-Lyubimiy (Amatus, CJSC); Onyx (Proizvodstvenno-Kommercheskaya firma Sistema Magazinov ONIX, LLC); Agat Cash&Carry (TH Agat, LLC); Verniy (Tovarishchestvo Svyatogo Ioanna Voina, LLC; Soyuz Svyatogo Ioanna Voina, LLC); K-RUOKA (Kesko Food Rus, LLC); Podsolnuh (Podsolnuh, LLC i dr.); Krasnoe&Beloe (PS Holding); Gorilka; Morkov (Yekaterinburg) (TM-Yekaterinburg, LLC); Lime (Orion, LLC); Helena; Karavay (TH Karavay, LLC; Firma Karavay, LLC); Kuvshinka (TKP Zhemchug, LLC); Strana Kalinka (Market, LLC); Koshelyok (Koshelyok, LLC); Zahoti (Paritet Produkt M, LLC and many IE); Altyn Igen (Altyn Igen, LLC i dr.); Hypermarket Nizkih Tsen (Triumph-plaza, LLC); NovaTor (NovaTor, LLC); Premier, Myasnaya

Lavka (Myasnaya Lavka, LLC and others); Baris (Baris Plus, LLC); Shaurskiy, LLC, Berkut, LLC (Santa); KDV Group, LLC (Yarche!) and others.

**550 FMCG Retail Chains of Russia (concise version)** provides a user of this information product with a solution to problems, which would be too costly to solve using the internal resources (a sales department or a development department of a retailer or a FMCG distributor):

- formation of the contact database of potential partners or competitors (FMCG chains with more than two stores);
- appraisal of competitors' positions (floorspace, number and format of stores among FMCG retail chains in Russia and CIS;

Potential end users of **550 FMCG Retail chains of Russia Database (concise version)** are:

- sales departments and TOP management of companies that produce goods for retail trade or offer their services to retail trade
- marketing and sales departments, TOP management, key customer service departments of companies that produce consumer goods
- marketing departments of FMCG retail chains in Russia



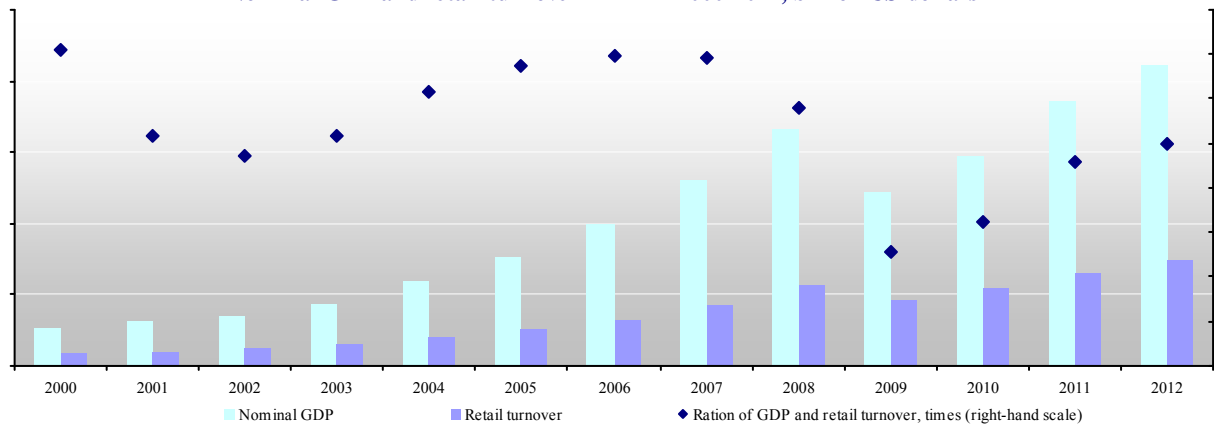
## Section 1. Condition of the FMCG retail market in Russia

### *Main macroeconomic figures of retail trade in Russia and performance indicators of the largest chains*

#### **Comparative analysis of Russian retail market and markets of other countries**

It should be pointed out that the Russian retail market, for the most part of its segments, is sufficiently “mature” and highly competitive, despite the level of concentration which, as a rule, is lower than in European countries and USA. Meanwhile, the key factors, which negatively influence the development of retail chains are as follows: shortage of qualified personnel, shortage of quality premises and high rent rates, as well as bureaucracy and corruption at the level of local government authorities and regulatory agencies. At the same time, the Russian consumer market continues to grow in physical terms, and the high inflation level in combination with strengthening of the rouble made it the largest in Europe according to results of 2011.

**Nominal GDP and retail turnover in RF in 2000-2012, billion US dollars**



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### *History of development, current conditions and development outlooks for FMCG chain retail trade*

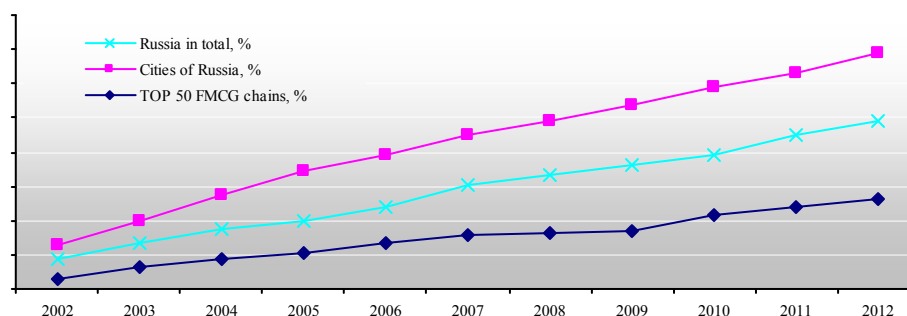
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Despite the fact that in Russia the share of modern formats exceeds 39%, the most significant part in development of retail sector is played by business conditions of 50 largest retailers, which provide for more than 17% of food commodities sales revenue all over Russia in total and 20% of food commodities sales revenue of modern retail formats. It should be pointed out that 10 largest FMCG retailers of Russia (X5 Retail Group (including Kopeika chain<sup>1</sup>), Magnit, Auchan Group, Metro Group, Diksi (including Victoria GC<sup>2</sup>), Sedmoi Kontinent, Lenta, O'Key) contribute 16.3% of food commodities sales revenue and 40% of food commodities sales in modern formats.

<sup>1</sup> In December 2010 Kopeika retail chain was acquired by X5 Retail Group.

<sup>2</sup> In June 2011 Victoria GC was acquired by Diksi GC.

Share of modern formats and TOP 50 FMCG chains in food commodities retail turnover in 2002-2012, %



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## Ratings of FMCG chains in terms of operational, financial indicators, logistics and formats

### Rating of FMCG chains in terms of number of stores

Information about the number of stores of the largest FMCG retailers in Russia (with revenue over 3 billion roubles in 2012) during 2005-2012 is presented in the table.

Number of stores of the largest FMCG chains during 2005-2012, as of the end of the period, (outlets)

No.	Legal name	Brand	Chain's type	Main formats <sup>3</sup>	2005	2006	2007	2008	2009	2010	2011	2012
1	X5 Retail Group N.V.	Karusel	federal chain	H	6	19	22	46	58	71	77	*
		Perekrestok	federal chain	S	120	168	194	207	275	301	321	*
		Perekrestok -Express, CityMag, Kopeika	federal chain	C	0	0	0	0	0	45	70	*
		Pyaterochka	federal chain	D	326	451	674	848	1039	1392	1918	*
		Kopeika, Kopeika Super <sup>4</sup>	federal chain	C, S	76,1	153	438	517	587	660	616	*
...	...	...	...	...	...	...	...	...	...	...	...	*

Data source: INFOLine IA data

### Rating of FMCG chains by total trading floorspace

Information about the total trading floorspace of the largest FMCG retailers in Russia (with revenue over 3 billion roubles in 2012) during 2005-2012 is presented in the table.

Total trading floorspace of the largest FMCG chains in Russia in 2005-2012, as of the end of the period, thousand square meters

No.	Legal name	Brand	Main formats	2005	2006	2007	2008	2009	2010	2011	2012
1	X5 Retail Group N.V.	Karusel	H	34.4	109.0	126.0	232.5	285.6	351.8	371.3	*
		Perekrestok	S	140.7	208.7	251.7	222.4	284.4	313.0	333.9	*
		Perekrestok -Express, CityMag, Kopeika	C	0	0	0	0	0	9.2	12.7	*
		Pyaterochka	D	196.3	257.4	357.5	419.2	493.0	586.3	735.2	*
		Kopeika, Kopeika Super <sup>5</sup>	C, S	76.1	153	224	250	274.8	294.8	274.2	*
...	...	...	...	...	...	...	...	...	...	...	*

Data source: INFOLine IA data

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### Rating of FMCG chains by net sales revenue

Information about the net revenue of the largest FMCG retailers in Russia (with revenue over 3 billion roubles in 2012) during 2005-2012 is presented in the tables.

<sup>3</sup> Legend: D - discounter, H - hypermarket, S - supermarket, C – convenience store

<sup>4</sup> In December 2010 X5 Retail Group acquired Kopeika retail chain.

<sup>5</sup> In December 2010 X5 Retail Group acquired Kopeika retail chain.

Dynamics of net revenue (without VAT) of the largest FMCG chains in 2005-2012, billion roubles

No.	Legal name	Brand	Main formats	Data	2005	2006	2007	2008	2009	2010	2011	2012
1	X5 Retail Group N.V.	Karusel	H	IFRS	2.4	9.8	31.2	41.7	53.5	61.1	*	*
		Perekrestok	S	IFRS	28.7	40.7	49.7	67.2	73.2	83.1	*	*
		Perekrestok -Express, CityMag, Kopeika	C	IFRS	-	-	-	-	-	1.9	*	*
		Pyaterochka	D	IFRS	38.3	53.6	75.4	111.0	148.3	188.3	*	*
		Kopeika, Kopeika Super <sup>6</sup>	C, S	IFRS	16.3	26.0	34.9	51.6	56.2	61.2	*	*
		Total for the chain	C, D, S, H	IFRS	-	76.2	136.1	207.6	275.2	341.6	*	*
...	...	...	...	...	...	...	...	...	...	...	*	*

Data source: INFOLine IA

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## Rating of chains by efficiency indicators

Information about the revenue per one square meter of trading floorspace<sup>7</sup> among the largest FMCG retailers in Russia (with revenue over 3 billion roubles in 2012) during 2005-2012 is presented in the tables.

Net revenue (without VAT) per one square meter of the trading floorspace of the largest FMCG chains (with revenue above 3 billion roubles) in 2007-2012, thousand US dollars per year

No.	Legal name	Brand	Main formats	2007	2008	2009	2010	2011	2012
1	X5 Retail Group N.V.	Karusel	H	9.5	*	*	6.4	*	*
		Perekrestok	S	*	*	9.5	9.4	*	*
		Perekrestok -Express, CityMag, Kopeika	C	-	-	-	*	*	*
		Pyaterochka	D	10.1	11.8	*	11.3	*	*
		Kopeika, Kopeika Super <sup>8</sup>	C, S	*	*	6.9	*	*	*
		Total for the chain	C, D, S, H	*	11.6	*	9.4	*	*
...	...	...	...	...	...	...	...	*	*

Data source: INFOLine IA

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## Rating of FMCG retail chains' distribution centers in Russia

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Description of distribution centers of TOP FMCG retail chains in Russia (with sales over 6 billion roubles) as of 01 January 2013

Legal entity	Chain's brand	Quantity, units	Total trading floor space, sq. m	Regional representativeness	Plans for DCs development
X5 Retail Group N.V.	Karusel, Pyaterochka, Perekrestok, Perekrestok-Express	28	522,9	*	*
...	...	...	...	...	...

Data source: INFOLine IA

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## Rating of FMCG retail chains of Russia by their formats

### Rating of FMCG chains by their net sales revenue

#### Main characteristics of the hypermarket format

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At the same time it should be pointed out that the difference in number of personnel between Russian and foreign FMCG retailers results from the following factors:

- Longer operating hours of retail outlets in Russia (a large number of supermarkets, hypermarkets, discounters and convenience stores in large cities operate round-the-

<sup>6</sup> In December 2010 X5 Retail Group acquired Kopeika retail chain.

<sup>7</sup> The INFOLine IA's procedure for calculation of revenue per one square meter involves calculation on the basis of the ratio of annual revenue to annual average trading floorspace, and may differ from similar indicators calculated by companies themselves.

<sup>8</sup> In December 2010 X5 Retail Group acquired Kopeika retail chain.

clock or till 23-24 hours<sup>9</sup>). In addition, the majority of Russian FMCG stores operate 7 days and more than 100 hours a week, while in the majority of European countries they work not more than 70-80 hours a week and 6 days a week

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### Main characteristic features of hypermarkets in Russia

The table contains the main parameters of retail outlets of Russian retailers that develop the hypermarket format. It is important to mention that besides the retailers indicated in the table the hypermarket format is developed in Russia by Universam Severo-Zapadny LLC, Prisma LLC, Vivat-Trade LLC, TGU Nash Magazin, Universal-Trading LLC, Victoria GC JSC, Yulena CJSC, Bahetle LLC and others. However the above-mentioned companies have just one hypermarket under their management, and for this reason they are not included into the table.


Number, trading floorspace and regional representativeness of hypermarkets of the largest retailers in Russia, as of 01 January 2013

Retailer	Brand	Chain's type	Number of outlets as of 01 Jan.2013	Aggregate trading floorspace as of 01 Jan.2013	Number of RF subjects where the units are situated	Regional representativeness
X5 Retail Group	Karusel	federal	77	*	*	*
	Pyaterochka-Maxi <sup>10</sup>		0	0	0	*
...	...	...	...	...	...	...

Data source: Companies' data, estimation of INFOLine IA

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Characteristic features of hypermarkets of the largest retailers in Russia, as of 01 January 2013

Retailer	Brand	Logo	Chain's type	Year of appearance	Product mix, items	Share of food commodities, % of total number of SKU	Average trading floorspace, ths. sq. m	Range of trading floorspace, sq. m
X5 Retail Group	Karusel (Pyaterochka-Maxi <sup>11</sup> )		federal	2004	*	*	*	*
...	...	...	...	...	...	...	...	...

Data source: Companies' data, estimation of INFOLine IA

### Rating of FMCG chains in the supermarket format

#### Main parameters of the supermarket format

Development of modern formats of FMCG retail trade in Russia began with supermarkets; as a result this format demonstrates the widest diversity of the main parameters, depending on the specific regional area or retailer. In judgment of INFOLine IA specialists, the main qualitative characteristics of the supermarket format in Russia currently are:

- A large self-service store (sometimes certain commodities are sold over the counter) with a relatively high (10 – 25%) share of

<...>

### Main characteristic features of supermarkets in Russia

The table contains the main parameters of retail outlets of Russian retailers that develop the supermarket format. It is important to mention that besides the retailers indicated in the table the supermarket format is developed in Russia by Aquatoria, Nograd (Aquamarket, LLC), Best (Best-Market, LLC), Geomart (Geomart-Retail, LLC), Victoria and Minimart (Diksi Group, JSC), Fresh and Nahodka (Europe, LLC

<sup>9</sup> Most actively companies switch to round-the-clock operation of their stores in cities with high saturation with retail chain outlets and, consequently, high level of competition, for instance, St. Petersburg.

<sup>10</sup> In May 2012 all Pyaterochka Maxi hypermarkets were rebranded into Karusel. The brand ceased to be.

<sup>11</sup> In May 2012 all Pyaterochka Maxi hypermarkets were rebranded into Karusel. Pyaterochka Maxi brand ceased to be.

(St. Petersburg)), Liniya (Corporation Grinn, CJSC) and others. However the above-mentioned companies have less than 15supermarket under their management and for this reason they are not included into the table<sup>12</sup>.



Number, trading floorspace and regional representativeness of supermarkets of the largest retailers in Russia, as of 01 January 2013

Retailer	Brand	Chain's type	Number of outlets as of 01 Jan 2013	Aggregate trading floorspace as of 01 Jan 2013	Number of RF subjects where the units are situated <sup>13</sup>	Regional representativeness
X5 Retail Group N.V.	Perekrestok	federal	347	*	*	*
	Zeleniy Perekrestok	federal	12	*	*	*
...	...	...	...	...	...	...

Data source: Companies' data, estimation of INFOLine IA

<...>

Characteristic features of supermarkets of the largest retailers in Russia, as of 01 January 2013

Retailer	Brand	Logo	Chain's type	Year of appearance	Product mix, items	Share of food commodities, % of total number of SKU	Average trading floorspace, ths. sq. m	Range of trading floorspace, sq. m	Average receipt, USD
X5 Retail Group N.V.	Perekrestok		federal	1995	*	*	*	*	*
	Zeleniy Perekrestok		federal	2008	*	*	*	*	*
...	...	...	...	...	...	...	...	...	...

Data source: Companies' data, estimation of INFOLine IA

### Rating of FMCG chains in the convenience store (discounter) format

#### The main parameters of the convenience store (discounter) format

As it has come to be generally accepted by the international retailers, the format of discount store should meet the “one commodity - one demand” rule. But it is important to emphasize that in Russia the discount store format, as such, is non-existent. At the same time the specialists of INFOLine IA would like to distinguish two subformats of the convenience store format: a soft discount store, for the formats of the number of the largest Russian players, such as Pyaterochka, Diksi, Magnit, Monetka, Kopeika, Maria-Ra and others, and a convenience store. In this section we are using the term of a convenience store meaning a soft discount store.

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#### The main characteristic features of the convenience store (discounter) format in Russia

The table contains the main parameters of retail outlets of Russian retailers that develop the convenience store (discounter) format. It is important to mention that besides the retailers indicated in the table the convenience store (discounter) format is developed in Russia by Monetka (franchise) (Moscow and Moscow region), and many others. However the above-mentioned companies have less than 100 convenience stores (discounters) under their management, and for this reason they are not included into the table<sup>14</sup>.

Number, trading floorspace and regional representativeness of convenience stores (discounters) of the largest Russian retailers (the table contains chains with more than 100 convenience stores (discounters)), as of 01 January 2013

<sup>12</sup> Only retail chains included by INFOLine IA specialists into Rating of FMCG Retail Chains of Russia industry survey are considered

<sup>13</sup> Regional representativeness of X5 Retail Group, Diksi GC and Element-Trade LLC (Monetka chain) is presented as of 01 April 2012, according to the companies' procedure of information disclosure.


<sup>14</sup> Only retail chains included by INFOLine IA specialists into Rating of FMCG Retail Chains of Russia industry survey are considered. Division into “discounters” and “convenience stores” is provisional and is assumed by the methodology of INFOLine IA.

Retailer	Brand	Chain's type	Number of outlets as of 01 Jan 2013	Aggregate trading floorspace as of 01 Jan 2013	Number of RF subjects where the chain is represented	Regional representativeness <sup>15</sup>
Magnit, JSC (Tander, CLSC)	Magnit	federal	6046	1977.5	*	*
...	...	...	...	...	...	...

Data source: Companies' data, estimation of INFOLine IA

The main characteristic parameters of the convenience store (discounter) format are presented in the table below.

Description of convenience stores (discounter) of the largest Russian retailers (the table contains chains with more than 100 convenience stores)

Retailer	Brand	Logo	Chain's type	Year of appearance	Product mix, items	Share of food commodities, % of total number of SKU	Average trading floorspace, ths. sq. m	Range of trading floorspace, sq. m	Average receipt, USD
Magnit, JSC	Magnit		federal	2000	*	*	327	*	*
...	...	...	...	...	...	...	...	...	...

Data source: Companies' data, estimation of INFOLine IA

### Rating of FMCG chains in the convenience store format

#### Main parameters of the convenience store format

INFOLine IA specialist refer the convenience store format to modern formats stores with floorspace of up to 500 square meters, for designation of which retailers and suppliers use the following terms:

- Convenience store. In this case the term "convenience store" reflects a critical factor of competitiveness: the convenient location of the store in relation to one's place of residence or work.

<...>

#### Main characteristic features of convenience stores in Russia

The table contains the main parameters of retail outlets of Russian retailers that develop the convenience store format. It should be mentioned that besides the retailers indicated in the table the convenience store format is developed in Russia by such chains as Perekrestok-Express /Citymag (X5 Retail Group in Moscow region), Sedmoi Kontinent (Moscow, Moscow and Kaliningrad regions), Pelican (Samara region) and others<sup>16</sup>. However, the above-mentioned companies have less than 100 convenience stores under their management and for this reason they are not included into the table<sup>17</sup>.

Besides, in view of their specificity, the table does not contain Magnit-Cosmetic (non-food goods, drogerie format), Fix-Price (segment of household goods, a small share of food commodities), Utkonos (in-store pick-up facilities for online ordered goods), Bashspirt (specialized alcohol retail outlets) and Myasnov GC (specialized meat products retail).

Number, trading floorspace and regional representativeness of convenience stores among the largest retailers of Russia (the table presents chains with over 100 convenience stores), as of 01 January 2013

Retailer	Brand	Chain's type	Number of outlets as of 01 Jan 2013	Aggregate trading floorspace as of 01 Jan 2013	Number of RF subjects where the chain is represented	Regional representativeness
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<sup>15</sup> Regional representativeness of X5 Retail Group, Diksi GC and Element-Trade LLC (Monetka chain) is presented as of 01 April 2012, according to the companies' procedure of information disclosure.

<sup>16</sup> The majority of chains, affiliated with the Alliance of Independent Chains of Russia, which included 57 members as of 01 July 2012.


<sup>17</sup> Only retail chains included by INFOLine IA specialists into Rating of FMCG Retail Chains of Russia industry survey are considered. Division into "discounters" and "convenience stores" is provisional and is assumed by the methodology of INFOLine IA.

TH Intertorg, LLC (Norma, LLC) <sup>18</sup>	Narodnaya 7Ya	interregional	*	*	*	*
...	...	...	...	...	...	...

*Data source: Companies' data, estimations of INFOLine IA*

The main characteristic parameters of the convenience store format are presented in the table below.

Description of convenience stores of the largest Russian retailers (the table contains chains with more than 100 convenience stores)

Retailer	Brand	Logo	Chain's type	Year of appearance	Product mix, items	Share of food commodities, % of total number of SKU	Average trading floorspace, ths. sq. m	Range of trading floorspace, sq. m	Average receipt, USD
TH Intertorg, LLC (Norma, LLC)	Narodnaya 7Ya		interregional	2004	*	*	500	*	*
...	...	...	...	...	...	...	...	...	...

*Data source: Companies' data, estimations of INFOLine IA*

## Demo-version

The full text of the sections contains information about main macroeconomic indicators of retail trade and performance of the largest retail chains, development history, current conditions and outlooks of FMCG retail chain trade, ratings of TOP largest retail chains of Russia in terms of retail outlets number and trading floorspace size (operational data, as well as revenue, effectiveness, logistics by formats (hypermarket, supermarket, discounter and convenience store, description of the largest players in each format at the FMCG market of Russia).

## Part 2. Database of 550 FMCG Chains and 450 Distribution Centers of Russia

Database is intended for optimization of interaction with retail chains, includes the following fields:

- Chain's brand and legal name
- Chief executive
- Actual address, phone, fax, e-mail and web site
- Formats developed (hypermarket, supermarket, convenience store, discounter)
- Total number of the chain's stores as of 01 January 2013
- Number of stores as of 01 January 2013 in terms of formats (hypermarkets, supermarkets, convenience stores) and total trading floorspace
- Net revenue (without VAT) of the retail chain in 2010-2012, billion roubles
- Regional representativeness Regional areas and cities in which the chain's stores are situated, including the number of stores (data include all chains except X5 Retail Group and Magnit)
- Number of DCs as of 01 January 2013
- Total floorspace of DCs as of 01 January 2013
- Regional representativeness of DCs as of 01 January 2013

### Layout of Database of 550 FMCG Chains and 450 Distribution Centers of Russia

<sup>18</sup> In May 2012 TH Intertorg LLC bought out the store of Norma chain.

## Federal chains

**Operational legal entity** Agrotorg, LLC, Agroaspect, LLC and others

**Brands** Pyaterochka

### Contact information

*Actual address:* 109029, Moscow, ul. Srednyaya Kalitnikovskaya, d.28, str.4  
*Phone:* +7 812 4483010  
*Fax:* +7 812 4483010  
*E-mail:* info@x5.ru  
*Site:* www.pyaterochka.ru

### Personalia:

*Chief Executive Officers:* Stephan Ducharme, acting CEO; Franc Michael Mros, CEO of the discounter format  
*Chief Procurement Officer:* Paul Martins  
*Chief Financial Officer:* Kieran Balfe  
*Chief Information Officer:* Luc Koenot

### Operational performance indicators of the chain:

*Number of stores as of 01 January 2013:* \*  
*Number of convenience stores as of 01 January 2013:* \*

*Total trading floorspace* \* thousand square meters

Financial performance:

Revenue in 2012: \* billion roubles without VAT  
Revenue in 2011: \* billion roubles without VAT

Revenue in 2010: \* billion roubles without VAT

**Regional representativeness (capitals):** in relation of cities the information is not available

**Regional representativeness (subjects):** Belgorod, Bryansk, Vladimir, Voronezh, Ivanovo regions\*\*\*

### Logistics:

*Number of DCs as of 01 January 2013:* \*  
*Total floorspace of DCs:* \*  
*Regional representativeness of DCs:* Central - \* (\*), Northwestern - \* (\*), Volga-Vyatka - \* (\*), Urals - \* (\*), Central-Chernozem - \* (\*), Middle-Volga - \* (\*), Southern - \* (\*), Privolzhskiy - \* (\*)

**Operating legal entity:** Trading House Perekrestok, CJSC

**Brands:** Perekrestok

### Contact information:

*Actual address:* 109029, Moscow, ul. Srednyaya Kalitnikovskaya, d. 28, str. 4  
*Phone:* +7 495 6628888, 7899595  
*Fax:* +7 495 6628888, 7899595  
*E-mail:* info@x5.ru, secretariat@perekriostok.ru  
*Site:* www.perekrestok.ru

The database contains information about more than 550 FMCG retail chains of Russia with over 30 thousand stores (excluding 49 thousand consumer cooperation stores and over 40 thousand stores of Pochta Rossii (Russian Post Service), with total trading floorspace above 14 million square meters, including over 26 thousand convenience stores, more than 3.3 thousand supermarkets and over 700 hypermarkets, 450 distribution centers, including 50 DCs that belong to TOP 10 of the largest retailers in Russia. The total revenue of chains in 2012 came up to over 3 trillion roubles.

Chains are divided into groups: federal chains (inside the group they are arranged in descending order by revenue); other chains by Federal Districts (FD) (inside each FD the chains are arranged in descending order by revenue).

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