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информационное агентство | information agency

ESOMAR WORLD RESEARCH
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REVIEW

Russian womenswear market.

Key trends in 2013.

Forecast till 2015

- Consumer market, household income and expenditure structure
- Current state of fashion retail
- Growth dynamics and key womenswear market trends in Russia
- Customer segmentation in womenswear market. Cross-segmentation: age and income

Content review

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

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 Servis-plus, Wincor-Nixdorf).

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www.infoline.spb.ru and www.advis.ru**

Introduction

In order to prepare the review "Russian womenswear market. Key trends in 2013. Forecast till 2015", the experts of INFOline agency thoroughly studied and analyzed the current situation in consumer market, described the environment of CFA segments (clothes, footwear, apparel), appraised dynamics and indicated key trends in womenswear market.

Fashion retail market remains one of the most attractive segments for development of contemporary retail formats in Russia thanks to the following characteristics:

- The apparel market grows by 8-10% per year significantly outpacing the retail trade in general showing the annual dynamics of 4-6%;
- Although open-air markets still account for 40% of womenswear sales, they are conceding their share to retail chains that are expanding quickly in the regions;
- There are preconditions for new retail openings. More than two thousand of modern shopping malls, with total area of more than 30 mln sq.m. have been built in Russia over the last decade.
- Effects of climate and specific mind-set make the Russians spend up to 10% of their income on apparel and footwear regardless of income level.

It is worth mentioning that the INFOLine's review "Russian womenswear market. Key trends in 2013. Forecast till 2015" also includes general analysis of **Russian consumer market and household income and expenditure structure** that comprises:

1. The state of consumer market in Russia
2. Household income and expenditure
3. Monetary policy and consumer loans
4. Breakdown of population by average income per capita
5. Household consumption expenditure structure

The review also covers **current state of fashion retail** in general, growth dynamics, volume of clothes, footwear and accessories market in 2005-2012 and forecast for 2013. Apart from that, the review includes the list of key retailers in clothes, footwear and sportswear market in Russia ranked by sales volume in 2009-2012.

• The main part of review is devoted to womenswear segment accounting for about 60% of total sales. At the same time the womenswear is not only the largest segment but also the most mature one, saturated with players and characterized by tough competition. **Growth dynamics and key trends in womenswear market in Russia, 2005-2012 and forecast till 2015** includes:

1. Womenswear market: main trends in 2002-2015.
2. Market structure by price segments.
3. Market structure by retail channels.
4. Product mix analysis. Product categories and dress codes.
5. Customer segmentation in womenswear market. Cross-segmentation: age and income.
6. Important aspects of consumer behavior in womenswear market.

While preparing the review "Russian womenswear market. Key trends in 2013. Forecast till 2015", the experts of INFOLine prepared the database of 100 key retailers operating in clothes and footwear market. The database includes valid contacts, number of stores and their regional distribution.

Issue 1. Consumer market, household income and expenditures structure

1. The state of consumer market in Russia

The Russian consumer market has been enjoying rapid growth over the last decade thanks to active stimulation of household income growth and consumer loan programs. In 2012 the retail trade turnover in Russia was more than 660 billion USD which amounted to 106,3% as compared to 2011. While Europe has been suffering from stagnation, Russia took over a leading position in consumption on the continent.

Retail trade turnover in Russia, 2006-2013.

Period	% to corresponding period previous year
2006 год	113,9
2007 год	115,2
2008 год	113,0
2009 год	94,9
2010 год	106,4
2011 год	107,0
1Q2012	107,9
2Q2012	107,4
1HY2012	107,7
3Q2012	105,6
4Q2012	104,9
2012 год	106,3
1Q2013	104,0
April 2013	104,1
May 2013	102,9
June 2013	103,5
2Q2013	103,5
1HY2013	103,7

Source: Federal State Statistics Service, Ministry of Economic Development

Major consumer market indikators in 2005-2013, % to corresponding period of the previous year
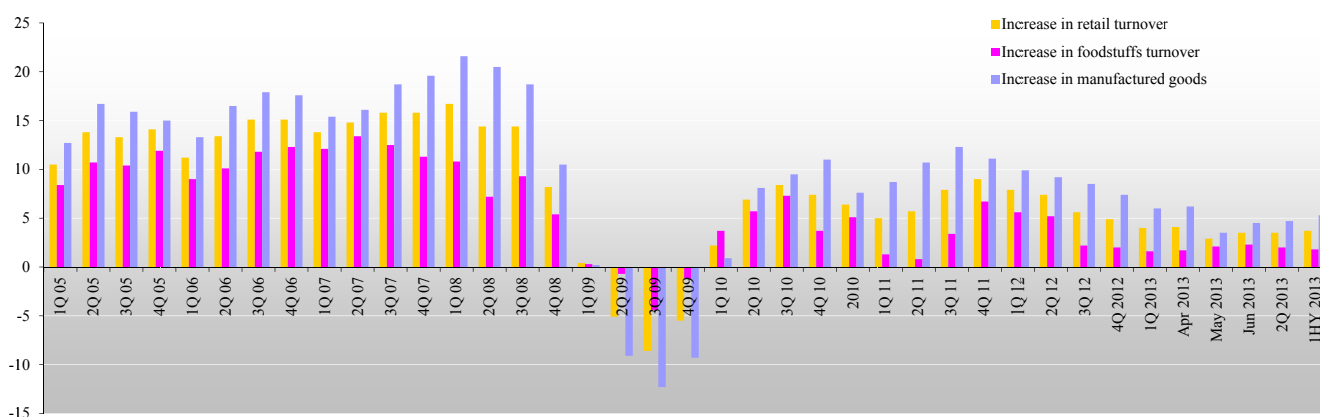
Source: Federal State Statistics Service, Ministry of Economic Development

At the turn of 2013-2014 consumer market moved to a new stage of development. The retail trade turnover has been slowing down considerably since the second half of 2012. This tendency is likely to prevail in 2013 as the indicator grew only by 3,7% in the first half of the year. The food market recorded the growth rate of 1,8%, the worst since the crisis of 2008-2009.

This slowdown in consumption growth is due to purchasing power reaching its limits. There is no significant increase in household income while non-consumption expenditures keep growing, e.g. housing services and utilities, public transport and

gasoline, taxes etc. In the mid-term it may result in stagnation or in case of negative scenario for macroeconomic development even in downsize of retail market.

Thousands of modern shopping malls, with total area of more than 30 mln sq.m., have been built in Russia over the last decade. Most retail segments are quite mature and some of them are even characterized by stiff competition. Under these circumstances retail chains got priority in business development strategy, as operating one or several stores becomes unprofitable. Retail chains have spread in all regions. Such companies as "Sportmaster", "Euroset", "Svyaznoy", just to name a few, operate a thousand stores each, while the leaders (Magnit, X5 Retail Group, DIXI) already manage several thousand stores.

In 2013 the companies included in INFOLine Retail Russia TOP 100 rating (listing 100 major retail chains in Russia) generated a total of 200 bln USD in earnings which represents more than a quarter of retail trade turnover. The growth of relevant segments and successful replacement of outdated open-air markets and independent stores with retail chains enabled these companies to maintain surpassing growth rate compared to the market in general.

The Russian economy has exhausted its sources of consumer market growth and further market development will follow a new pattern.

2. Household income and expenditures

Analysis of trends in salaries and wages and average income per capita, 2000 to 2012 (except for 2009) indicates that payroll growth rates surpassed those of real average income per capita due to lower income generated by entrepreneurial activity and continuing trend of salaries and wages growth outpacing the productivity. However after significant fall in real household incomes in 2008-2009, salaries and wages growth considerably slowed during the post-crisis years. In April 2013 the Ministry of Economic Development downgraded its payroll growth forecast to 4,5% from previously expected 8%. Officials forecast salaries and wages to increase by 5,2% in 2014, 6% in 2015 and 6,2% in 2016.

Dynamic of earnings and wages in 2000-2013, % to corresponding period of the of the previous year
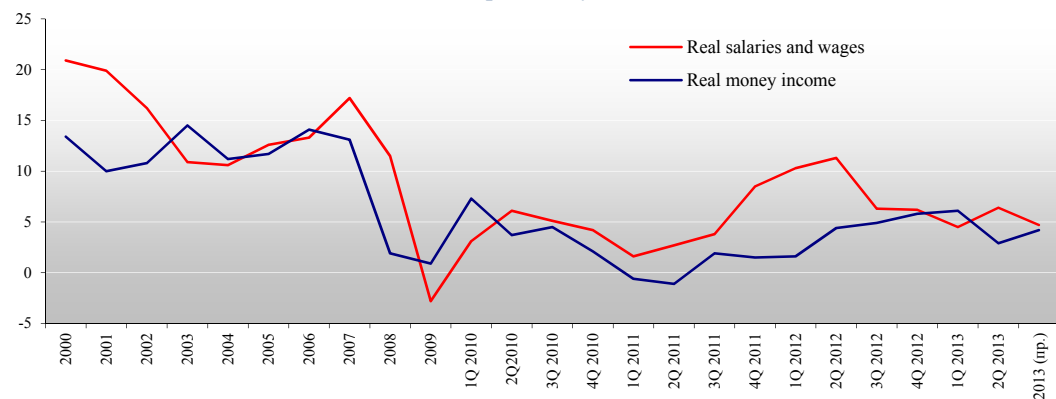
Source: Federal State Statistics Service, Ministry of Economic Development

In the first half of 2013, the growth rates of real household income were 4,4%, those of real salaries and wages – 5,5%. At the beginning of the second half of the year nominal average monthly salary rose by 13,3% year-on-year to about 1000 USD. According to the forecast published in April 2013 by the Ministry of Economic Development, nominal accrued salary will reach 996 USD in 2013, 1103 USD in 2014, 1230 USD in 2015, 1373 USD in 2016.

Dynamics of nominal accrued salary and average income per capita in 2000- 1Q2013 and forecast for 2013-2016, in thousand roubles

■ Nominal accrued salary
■ Average money income per capita
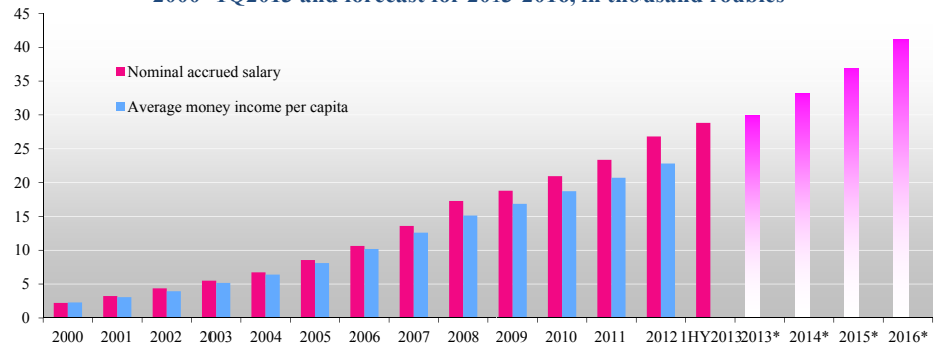
Source: Federal State Statistics Service, Ministry of Economic Development

In the second quarter of 2013 the share of income stemmed from social transfers fell by 0,8 percentage points as compared to the same period in 2012, while property and entrepreneurial income decreased by 0,2 percentage points and 0,1 percentage points, correspondingly. At the same time, the labor remuneration increased its share in the structure of household income by 11 percentage points while other income remained unchanged.

Structure of household money income by income sources in 2000-2013, %

■ Salaries and wages, incl. unofficial labor remuneration   ■ Entrepreneurial income   ■ Social benefits   ■ Property income   ■ Other income

Source: Federal State Statistics Service, Ministry of Economic Development

Over the last decade the highest level of consumption was recorded in 2012 with expenses on purchasing of goods and services accounting for 74,2% of household money income (73,5% in 2011). In the second quarter of 2013 the share of savings and expenditures on purchasing of foreign currency decreased by 0,4 percentage points to 9,5% and 4%, correspondingly, compared to the same period in 2012. The share of expenses on purchasing of goods and services and compulsory payments grew by 0,2 percentage points to 73,7% and 11,1%, correspondingly. The cash on-hand increased by 0,4%.

3. Monetary policy and consumer loans.
4. Breakdown of population by average income per capital

Even official statistics prove significant income disparities in Russia. The Federal State Statistics Service reported that in the first half of 2013 30,4% of total monetary income (30,2% in the first half of 2012) went to the richest 10% of the population while 1,9% of the total went to the poorest 10%. Taking into consideration significant amount of unreported income stemmed from offshore companies, illegal income of civil servants and gray income of private sector, the estimated Gini coefficient in Russia is not less than 0,5-0,6. This value is typical for emerging economies such as Brazil, Mexico and China with affluent bourgeoisie accumulating income in the region.

Breakdown of population by average income per capita, % of population

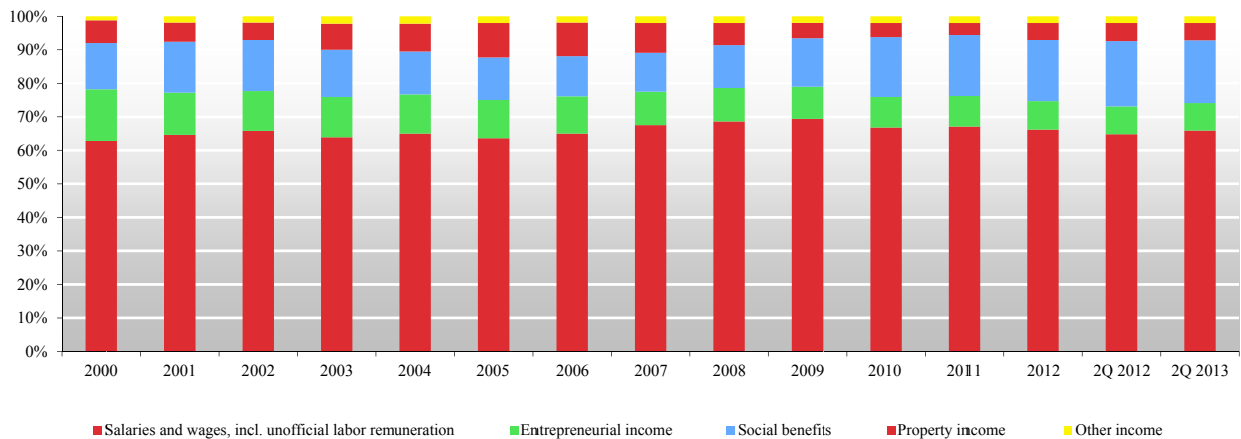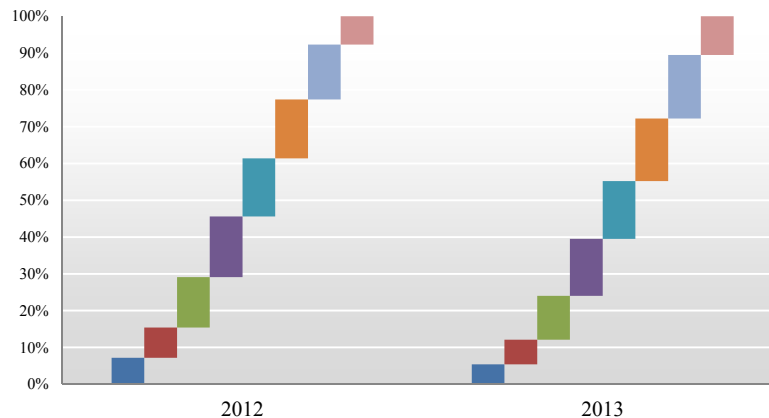*Source: Federal State Statistics Service, Ministry of Economic Development*

By the second half of 2013 an average salary rose by 13,3% to 1040 USD as compared to the corresponding period of 2012. Considerable differentiation in the salary and income levels from region to region should be taken into account. [1]

Structure of household disposable income by Russian regions

	Disposable income (average per household member monthly, roubles)	Of them, %				
		Gross income	incl. money income	Value of food consumed in natural form	Value of manufactured goods and services consumed in natural form	Value of earnings and expenditure
Moscow						
Murmansk Oblast						
Saint-Petersburg						
Komi Republic						
Arkhangelsk Oblast						
Lipetsk Oblast						
Oryol Oblast						
Russian Federation						

Source: Federal State Statistics Service, Ministry of Economic Development

The regional differentiation of financial resources defines uneven structure of retail trade turnover in Russia. Thus, in the first half of 2013 11 regions (Moscow, Moscow region, Saint-Petersburg, Sverdlovsk, Krasnodar, Samara, Tatarstan, Bashkortostan, Tyumen, Chelyabinsk, Rostov regions) accounted for 50,9% of retail turnover, which is by 0,14 percentage points lower than in January-June, 2012.

5. Household consumption expenditure structure

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1 Assessment based on selective household budget research and macroeconomic indicator of average income per capita. The indicators for 2005-2010 are calculated based on population census of 2010.
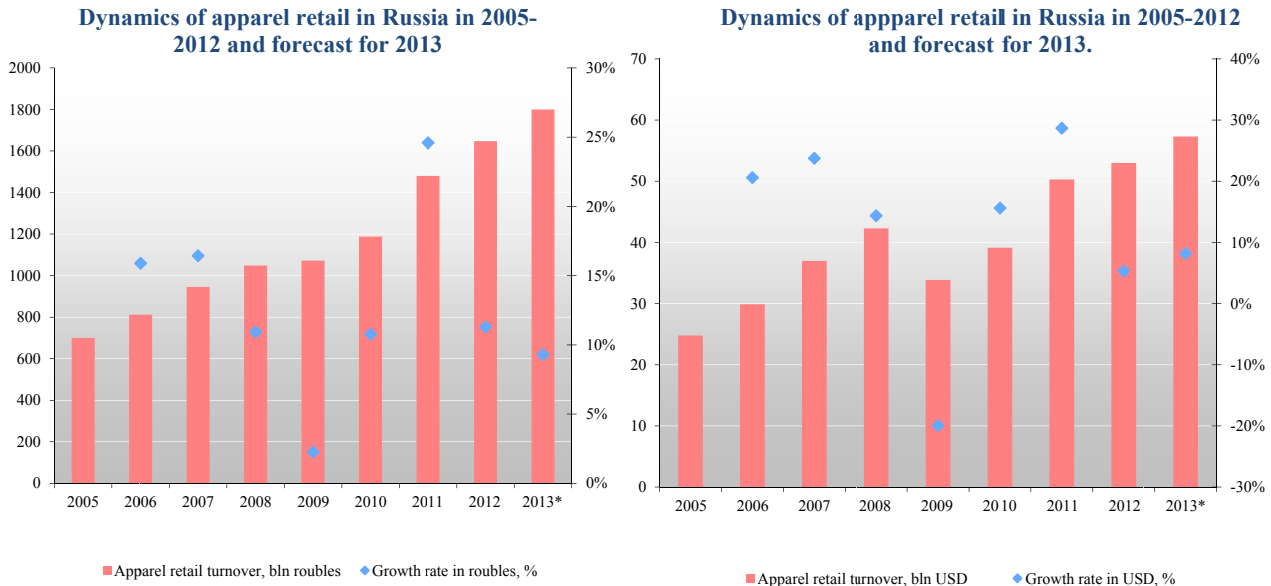
2 2007 – over 27000,0 roubles.

3 Gini coefficient is a measure of statistical dispersion intended to demonstrate population inequality by some indicator.

Issue 2. The current state of fashion retail

The current state of fashion retail is characterized by slower growth rate due to saturation of some segments, tougher market competition and national economic conditions. The Russian CFA market (clothes, footwear, accessories) exceeded 50 bln USD in 2012 with apparel accounting for about 60%, footwear – 36% and accessories – around 4%.

Dynamics of apparel retail in Russia in 2005-2012 and forecast for 2013

Apparel retail turnover, bln roubles   Growth rate in roubles, %

Dynamics of appparel retail in Russia in 2005-2012 and forecast for 2013.

Apparel retail turnover, bln USD   Growth rate in USD, %

Source: Federal State Statistics Service, Ministry of Economic Development corrected by INFOLine experts

Although in 2012 the apparel market slowed down as compared to the previous year, the growth rates still ranged from 3% to 6% depending on the product category.

Dynamics of fashion product categories in 2012-2013

Product	1Q2013 in % to 1Q2012 (In comparable prices)	2012 in % to 2011 (In comparable prices)	Share of total sales in 2012, %		Share of total sales in 2011 (in actual prices), %
			in actual prices	in prices of 2011	
Fabrics					
Outerwear					
Lingerie					
Fur clothes					
Socks and stockings					
Leather footwear					

Source: Federal State Statistics Service

The apparel market slowdown impedes development of CFA on the whole with apparel being the most substantial segment. In its turn, a similar process is typical for the apparel market itself with womenswear accounting for about 60% of total sales. At the same time the womenswear is not only the largest segment but also the most mature one, saturated with players and characterized by tough competition. Combined, these factors predetermine worsening CFA market environment.

Rating of major retailers in clothes, footwear and sportswear market in Russia ranked by revenue in 2009-2012, bln roubles, VAT excl.

Company	Brand	Data source	2009	2010	2011	2012
GC"Sportmaster"	Sportmaster	RAS, assessment				
Adidas, OOO	Adidas and other	RAS, assessment				
ТН Центробувь, ZAO	CentrObuv, Centro	RAS УО				
Inditex	Zara, Bershka, Massimo Dutti, Pull & Bear и другие	RAS, assessment				
Gloria Jeans, OAO	Gloria Jeans & Gee Jay	УО				
GC "Soortmaster"	O'STIN	RAS, assessment				
Stokmann, ZAO	Stokmann	RAS, УО				
BOSCO DI CILIEGI	Bosco and other	RAS, УО, assessment				
Oggi (Oodji)	Oggi (Oodji)	RAS assessment				
Moneks Trading, OOO	Mothercare, American Eagle, The Body Shop and other	RAS, assessment				
Melon fashion group, OAO	Befree, Zarina, Love Republic	УО				
Modny Continent, OAO	Incity	RAS УО				

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Review «Russian womenswear market.
Key trends in 2013» Forecast till 2015.

Issue 3. Growth dynamics and key trends in womenswear market in Russia, 2005-2012 and forecast till 2015.

1. Womenswear market: main trends in 2002-2015.

2. Market structure by price segments

Russian fashion market can be divided into several price segments with their peculiar growth dynamics, business operations and consumer behavior. Current state of each segment and main trends in their development in short- and mid-term will be analyzed below. It should be noted that indicated shares of price segments are typical for market on the whole but the share of each segment in each region varies with budget and middle segment usually increasing and premium and luxury segments decreasing.

Shares of price segments in womenswear market inRussia, 2012

- middle market 56%
- value 34%
- luxury 7%
- premium 3%
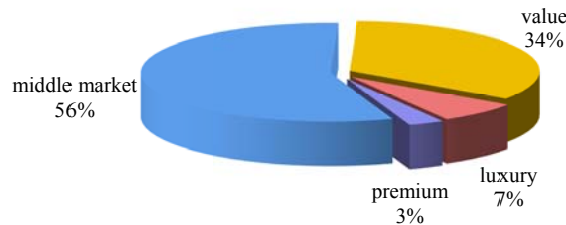
2.1 Value price segment

Average price positioning up to 50 USD

Turnover: 11,7 bln USD or 34% of total womenswear market

The share of value segment is quite substantial and accounts for more than one third of total turnover thanks to prevalence of open-air markets in consumption pattern of most Russians. Although the prices in open-air markets are averagely 15-18% higher than in main retail chains of value segment, uncivilized channel is still very popular with Russian consumers. However strong loyalty to open-air markets is usually determined by psychological factors, i.e. consumers are sure that prices there are lower. It also happens that open-air markets often offer goods lacking in retail chains. For example, while plus-size clothing was only limitedly available in value chains, the open-air markets offered this category in abundance. To some extent it is caused by the fact that it is easier for vendors in open-air markets to get the feedback from customers and adjust their product-mix to new demand. It takes much more time for retail chains only to get information not even talking about reacting to it due to organizational structure.

However the share of open-air markets has been declining for several years ongoing providing new mid-term opportunities for value chains. In fact, there is a massive shift of once open-air markets' audience to retail chains. In 2012 open-air markets accounted for 69% of turnover in value segment. Generally, they are conceding 5-6% to retail chains annually. The cases of switching to consumption in middle segment are so rare that they can be excluded from the analysis.

oodji

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This shift of the audience is very important for the retail chains as possibilities of regional expansion are exhausting little by little and the competition in the local markets is constantly growing. The interest of main value segment players such as Sela, Gloria Jeans, Oodji to foreign markets proves this observation. Online retail is another alternative channel to consolidate dispersed regional demand especially where brick-and-mortar stores could hardly breakeven. At the same time, the share of the segment has been declining recently backing off after the surge reported from 2008 to 2009 when thanks to the crisis the segment added around 23% at once.

The ongoing structural change is very important for the players, as the value segment will not increase its share in future. In fact, intensive development implying increasing sales in the current store locations is the main possibility for retail chains. However, the audience switching to retail chains from the open-air markets is very peculiar and requires special attitude.

Undoubtedly, this audience is very unpretentious and quite undemanding to the service offered as not long ago they shopped in the open-air markets often with no possibility even to try the clothes on. According to the opinion polls, these customers appreciate the service offered by value retail chains extremely high. However, relying completely on this audience may be quite risky. These consumers are very price-sensitive and as a consequence, they show weak loyalty to brands on the whole. Taking into consideration that value segments implies lower-margin and high volume retail, the players usually can not afford to compete on price and the only option is to create some additional advantage even if only a temporary one. Creating a wide product mix is currently the most popular and effective strategy. In fact, the players turn their shops into family department stores with apparel, shoes, accessories for women, men, children including special offers such as plus sizes clothing. This retail business model is more suitable for this audience as first of all, it most closely resembles the open-air market pattern with its offer of various goods and secondly, in value segment women usually go shopping for the needs of the whole family.

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Review «Russian womenswear market.
Key trends in 2013» Forecast till 2015.

Another point crucial for understanding the value segment audience is the phenomenon of "distorted price perception" observed in the regional markets. According to the opinion polls, around 65% of the respondents consider such brands as Zara, Topshop to be premium. At the same time the middle class perceive value segment brands as mid-priced ones, consume them regularly and show very stable demand.

Therefore, further changes in value segment will imply structural reorganization and its market share will stabilize at 32-34%.

The offer of womenswear in value price segment:
- Non-branded goods and counterfeit of well-known brands of South-Eastern Asian and Turkish origin;
- Product mix offered by Russian retail chains (Sela, Tvoe, Gloria Jeans, Oodji);
- Product mix offered by foreign retail chains targeting mainly younger audience (Bershka, New Yorker, Jennyfer);
- Product mix offered by family discounters (stocks, private labels) (Vesh!, Familia) and private labels of hypermarkets in "textile" product category (Auchan, METRO).

2.2 Middle price segment

2.3 Premium and Luxury Price Segments

3. Market structure by retail channels

4. Product mix analysis. Product categories and dress codes

5. Customer segmentation in the womenswear market. Cross-segmentation: age and income

1. **Young women aged 16-25**
2. **Young women aged 26-35.**
3. **Women aged 36-45.**
4. **Women aged 46-55.**
5. **Women older than 55.**

6. Important aspects of consumer behavior in the womenswear market

Conclusion

- Major consumer market indicators in 2005-2013, % to corresponding period of the previous year
- Dynamics of earnings and wages in 2000-2013, % to corresponding period of the previous year
- Dynamics of nominal accrued salary and average income per capita in 2000 – 1Q2013 and forecast for 2013-2016, in thousand roubles.
- Structure of household money income by income sources in 2000-2013, %
- Structure of household expenditure in 2000-2013, %
- Retail deposits and loans in 2007-2013 in roubles and foreign currency, bln roubles.
- Breakdown of population by average income per capita, % of population.
- Breakdown of population by average income per capita, %
- Structure of household disposable income by Russian regions
- Retail trade structure by regions from January to June 2012, %
- Retail trade structure by regions from January to June 2013, %
- Changes in share of 69 regions (except for major 11) in retail trade in 2003-2013, %
- Regional structure of retail trade in Russia in 2003-2013, %
- Number of regions with positive dynamics of retail turnover to corresponding period of the previous year/
- Changes in household consumption expenditure structure, % to money income
- Structure of household consumption expenditure structure by average disposable income per capita, %
- Dynamics of apparel retail in Russia in 2005-2012 and forecast for 2013/
- Dynamics of apparel retail in Russia in 2005-2012 and forecast for 2013
- Dynamics of fashion product categories in 2012-2013
- Rating of major retailers in clothes, footwear and sportswear market in Russia ranked by revenue in 2009-2012, bln roubles, VAT excl.
- Dynamics of womenswear market in 2005-2015, bln USD
- Market capacity of major regional markets in Russia, bln USD
- TOP-10 apparel brands globally
- Shares of price segments in womenswear market in Russia, 2012
- Shares of retail channels in womenswear market, 2012
- Online retail structure in Russia in 2012
- Customers are ready to spend on one item
- Structure of product mix womenswear, footwear and accessories in middle price segments by value in 2012
- Structure of product mix womenswear, footwear and accessories in middle price segments by unit in 2012
- Sales structure in the segment "Young women aged 16-25"in 2012, bln USD
- Sales structure in the segment "Young women aged 16-25"in 2012, bln USD
- Sales structure in the segment "Young women aged 26-35"in 2012, bln USD
- Sales structure in the segment "Young women aged 26-35"in 2012, bln USD
- Sales structure in the segment "Women aged 36-45"in 2012, bln USD
- Sales structure in the segment "Women aged 36-45"in 2012, bln USD
- Sales structure in the segment "Young women aged 46-55"in 2012, bln USD
- Sales structure in the segment "Young women aged 46-55"in 2012, bln USD
- Sales structure in the segment "Young women older than 55"in 2012, bln USD

Informational products of INFOLine

INFOLine is an independent company working on researches of Retail and Consumer goods industry since 2003. **Retail audit**, conducted by IA INFOLine, claims to be the best on the market. Among the clients of IA INFOLine there are the largest retail chains and more than 50% of the major suppliers of consumer goods.

NEW! Research and rating "**INFOLine Retail Russia: TOP-100. Results 2012. Trends 2013**"

It is a unique project on creation of the well-established industry-wide rating and detailed description of 100 largest retail chains in Russia. It contains information on the key macro- and micro- economic indicators of Russia and retail industry, dynamics of key performance indicators of TOP-100 companies, review and forecast for FMCG, Consumer electronics, DIY and household goods, telecommunications, pharmacy, cosmetics, fashion and children's products segments development. Moreover the research provides reference data of 100 largest retail chains with information on operating and financial performance, store formats, mergers and acquisitions, investment plans and strategies.

Issue date:	**25 November 2013 г.**
Number of pages:	**1700 (500 – analytics + 1200 reference data)**
Provision mode:	**Electronically and printed**
Price, rub.	**100 000**

INFOLine provides the following informational products specifically for retailers and consumer goods industry experts:

Range 1: Periodic review "Conditions of consumer market of Russia and Rating of FMCG retail chains in Russia"

The industry review contains information about development of the retail market, commissioning of new shops, new formats, mergers and acquisitions, corporate events, logistics, operational performance, investment plans and characteristics of the interaction with suppliers of the leading FMCG chains. The survey includes macroeconomic indicators, statistics and analysis for the reporting month.

Issue date:	**Monthly**
Number of pages:	**From 150**
Provision mode:	**Electronically**
Price, rub./month	**10 000**
Price (ENGLISH VERSION), rub/month	**15 000**
Price (annual subscription 2013-2014), rub/month	**5 000**

The industry review **Conditions of consumer market of Russia and Rating of FMCG retail chains in Russia** contains:
- Operational indicators of TOP-130 FMCG retailers (number of shops, selling space, revenue)
- Section I. Development of retailing in Russia
- Section II. Crucial events of the retail sector
- Section III. Events and development plans of FMCG chains

Range 2: Off-the-shelf products of INFOLine from "research of retail sector" range

NEW!!! GEOATLAS "Shopping malls and hypermarkets (DIY and FMCG) in Moscow / St Petersburg. Results 2012. Forecast for 2013"

GEOATLAS includes review sections, which provides an analysis of the situation in Moscow and St. Petersburg, along with - NEW! - diagrammatic map reflecting the key indicators of the retail industry in Moscow and St. Petersburg. Diagrammatic map is available printed

Issue date:	**5 February 2013 г.**
Number of pages (St. Petersburg/Moscow):	**22/24**
Provision mode:	**Printed**
Price, rub. St. Petersburg + Map of A0 size	**30 000**
Price, rub. Moscow + Map of A0 size	**40 000**

Diagrammatic map contains tube lines, railway system and railway stations etc.
Cartograms: "Population by municipal districts", "Coverage of the territory by shopping malls and retail & entertainment centres", "Hypermarkets FMCG", "Hypermarkets DIY" etc.

NEW!!! Analytic database "600 FMCG retail chains in Russia"

600 FMCG chains produce 40% of customer goods turnover. They run 35 thousand stores (more than 3.6 thousand supermarkets and 730 hypermarkets) with total selling space of more than 14 million sq. m. In 2012 total revenue of TOP-retailers amounted to almost 3.4 trillion rubles (excluding VAT) and turnover exceeded 3.9 trillion rubles. More than 540 distribution centres are used to ensure efficient logistics.

Issue date:	**15 October 2013**
Number of pages:	**650 – extended**
	250 –basic
Provision mode:	**Electronically and printed**
Price of the extended version, rub.	**50 000**
Price of the basic version, rub.	**35 000**

NEW!!! "Shopping centres in 32 cities and regions of Russia. Trends 2013. Forecast till 2016"

The research provides description of real estate market in 32 cities and regions of Russia, benchmarking analysis of the market of shopping centres, forecast of sector development till 2015, and key trends 2012-2013. Russian cities were ranked by the specialists of IA INFOLine according to the total value and total leasable space of shopping centres, as well as the level of saturation by shopping centres per capita. The base of the research is a unique database of shopping centres, existing and under construction, which includes more than 2,500 locations.

Issue date:	**26 July 2013 г.**
Number of pages:	**272**
Provision mode:	**Electronically and printed**
Price, rub.	**30 000**

We recommend you some other off-the-shelf products of INFOLine in the "research of retail sector" range
(Products are available in Russian and English):

Research	Description	Issue date	Price, rub.
NEW!!! "DIY market in Russia. Results 2012. Forecast till 2016"	It contains comparative analysis, structured description and ranking of the major DIY markets and players. Rating "TOP-50 largest operators of DIY Russia" includes indicators of net revenue, average purchase size, profitability, number of shops in the chain, selling area size and headcount.	II quarter 2013	50 000
NEW!!! "FMCG hypermarkets in Russia. Results 2012. Forecast till 2015"	It contains overview of the FMCG retail market in Russia, history and prospects of development of the hypermarket format, M & A deals, reference data on 70 hypermarket format retailers, analysis of overall conditions of the hypermarket sector in 27 cities and regions of Russia.	II quarter 2013	From 40 000
"Private labels of FMCG retailers in Russia. Results 2010 -201. Forecast till 2015"	It contains trends of Private Labels market abroad, description of changes in consumer preferences in Russia and worldwide, evaluation of PL competitive strategies of the leading companies of the international retail market, techniques to improve efficiency development and promotion activities of Private Labels.	IV quarter 2011	~~50 000~~ *Discount 30%* 35 000
Coming SOON! "FMCG retail in Russia 2013. Forecast till 2015"	It is a comprehensive study of the retail market in Russia 2010-2015. It contains analysis of the market conditions in various regions, description of the dynamics of retail chains development by regions, and benchmarking of the effectiveness and efficiency indicators of more than 100 FMCG retailers in Russia.	Scheduled for 2014	-
NEW!!! "Women fashion apparel market in Russia. Trends 2011. Forecast till 2015"	For the purpose of the research preparation specialists of INFOLine studied and analysed the current situation on consumer market, specified the conditions of fashion apparel market (fashion-retail), presented dynamics and trends of Russian market of women's clothing, etc.	IV quarter 2013	5 000

Range 3: Periodic reviews of IA INFOLine on consumer goods market

Timely and periodic information about Russian industry sector you are interested in, prepared through monitoring of Russian and foreign companies' activities, thousands business and industry mass media sources, news agencies' information, Federal and local authorities' reports.

Key benefits from INFOLine services:

1. Full version of the research is presented in a convenient format of your choice (HTML, Word, PDF, CHM)
2. Possibility to obtain a professional opinion of INFOLine experts and access to the company's archives (from 2003) upon a personal request
3. Free of charge publishing of press-realises on ADVIS.RU and affiliate informational platforms of the agency

Product name	Description	Frequency	Price per month, rub.
Monthly review "Russian macroeconomics and conditions of manufacturing sector"	Macroeconomic overview of the situation in various sectors of Russian economics	Monthly	5 000
Industry news "Retail market in Russia"	Timely and periodic information about Russian industry sector of your interest	Daily	5 000
Industry news "Logistics and inventory management"		Weekly	5 000
Industry news "Foodstuff industry and food product market" (more than 15 sectors of the food industry!)		Twice a week	6 000
Industry news "Advertising and marketing activities"		Weekly	4 000
Monthly review "Database of new products of the food industry" Available product range updates: dairy products, meat products, confectionery, bakery, oil and fat products, dressings and sauces, ice cream and prepared food	Overview of new products on the food market in Russia and worldwide	Monthly (around 50 recently developed products in each issue)	15 000

Attention! *The specified above set of products and ranges is not exhaustive*
Besides the off-the-shelf products IA INFOLine provides its customers with set of individual information services for targeted solving of the extensive range of business problems. These are commissioned studies, designing of a specific database, product and price matrix monitoring, targeted monitoring upon a request, etc.

The purchase procedure is very simple. You provide us with relevant billing details- we issue an invoice and a contractual agreement with the all the "closing" documents.

For any additional information and details don't hesitate to contact us by phone +7 (812) 322-68-48 and +7 (495) 772-76-40

Also you can contact us by e-mail: retail@infoline.spb.ru.

We are always happy to answer your questions!

Managers of Customer Service department

**Clients of INFOLine can receive special discounts and bonuses
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