



**Intesco
Research
Group**

CATERING AND CATERING MARKET



MOSCOW 2014

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RESEARCH METHODOLOGY

Subject of research:

RUSSIAN CATERING MARKET

Goal of research:

EVALUATION OF THE MARKET CONDITION AND IDENTIFYING OF THE MAIN TRENDS OF ITS DEVELOPMENT FOR 2015-2017

Regions of research:

RUSSIA, REGIONS OF RF, LARGEST CITIES OF RF

Main blocks of research:

CHARACTERISTICS OF RUSSIAN CONSUMERS
VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET
NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF RF
RUSSIAN CATERING MARKET
MARKET OF FIXED-SITE AND EVENTFUL CATERING MOSCOW
MARKET OF FIXED-SITE AND EVENTFUL CATERING SAINT PETERSBURG
FIXED-SITE AND EVENTFUL CATERING IN REGIONS OF RF
TRANSPORT CATERING MARKET
LARGEST COMPANIES ON RUSSIAN CATERING MARKET
TRENDS ON RUSSIAN CATERING MARKET
FACTORS INFLUENCING CATERING SERVICES MARKET
FORECAST OF RUSSIAN CATERING MARKET FOR 2015-2017

The sources of information, which are used in the research:

Federal State Statistics Service
The Ministry of Economic Development
The Federal Customs Service
Industry experts' estimates
Reports on retail sales
Data of the main players of the branch
Printed and electronic publications of the branch

The research contains 42 schedules, 23 diagrams, 21 tables.

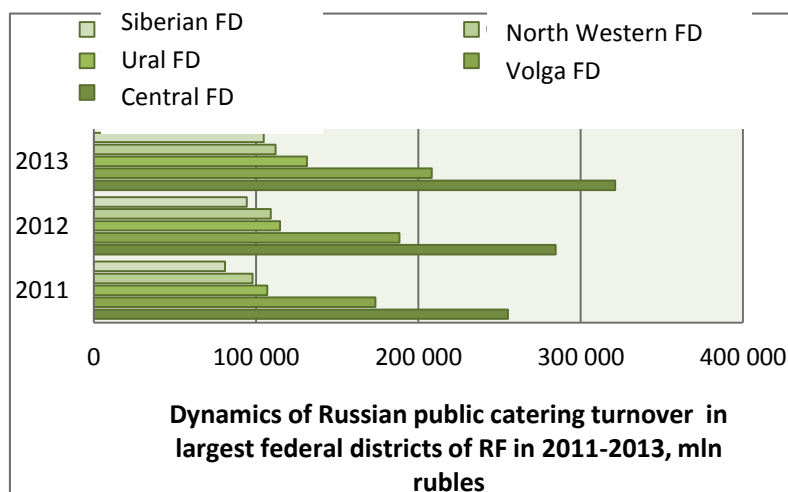
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CHAPTER 3

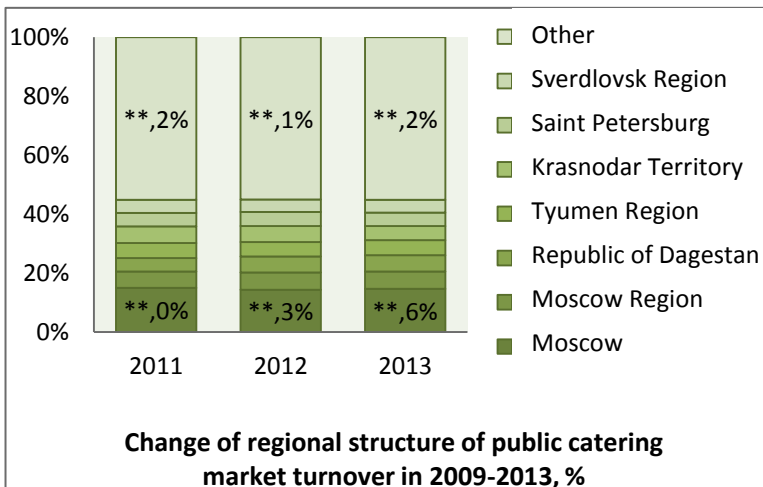
VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

The largest federal district by the public catering turnover is Central FD. In 2013 the volume of services of this branch amounted to ***,1 billion rubles, Moscow accounted for **% out of them. Volga FD ranked second (**,3 billion rubles), Ural FD – third (***,2 billion rubles).

The greatest relative growth of the parameter in 2013 was marked in North Caucasian federal district (**% compared to 2011) that speaks about fast rates of the market development in regions of this district, in particular in Republic of Dagestan.



The share of Moscow in regional public catering market turnover structure in 2013 amounted to **%. During the surveyed period of (2009-2013) parameters decreased by 2%.



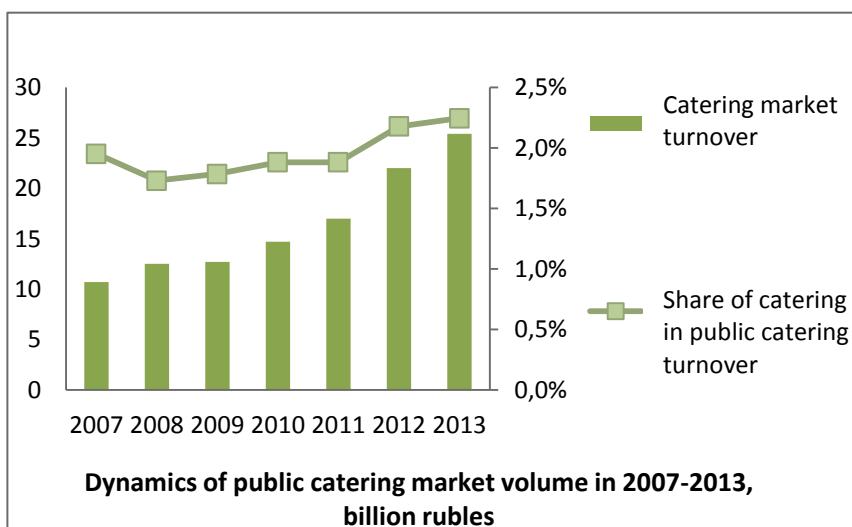
Significant changes since 2009 were marked in Tyumen Region (the decrease by * %) and Republic of Dagestan (growth by * %). An increase of the aggregate share of Krasnodar Territory by * % (to **%) was caused by the expansion of the service sphere during the preparation to the Olympics of 2014.

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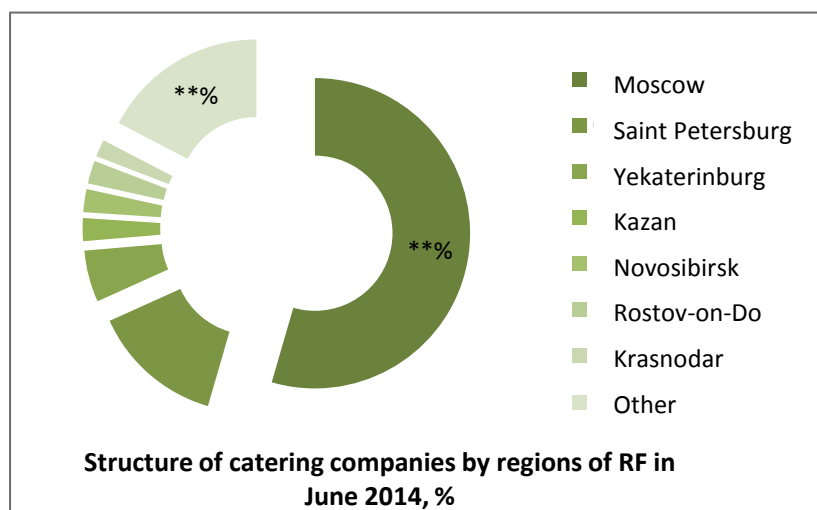
RUSSIAN CATERING MARKET

The main markets of outdoor service are concentrated in Moscow and to a lesser extent in Saint Petersburg. More than one half of office segment volume in Moscow is concentrated, thus **% of the industrial market are concentrated in regions where the quantity eating on one industrial facility can make some tens of thousands of people that is comparable with several office centers in Moscow

Geography of catering market of the Russian Federation is rather wide, where number of regions with enterprises in the declared segment of public catering market function, include: Moscow and Saint Petersburg. Distribution is influenced, certainly, by number of consumers, as at present, and possible in the long term. That is also important, how often large



cultural, sporting or political events demanding a large number of the service personnel and individually developed holding plan takes place in the city.



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MARKET OF FIXED SITE AND EVENTFUL CATERING OF SAINT PETERSBURG

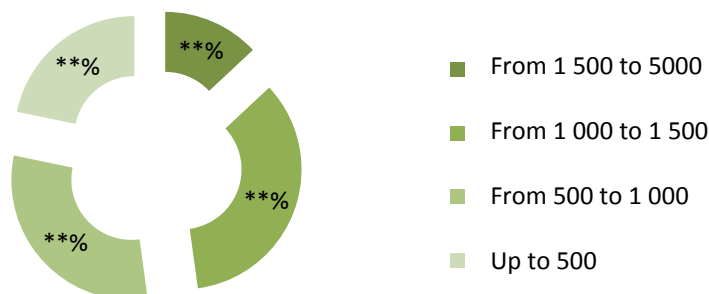
Characterizing catering industry of Saint Petersburg which has developed by June, 2014, it should be marked that those companies which form 90% of the offer, are engaged in event catering. The popular direction in the city and region is organization of banquets and buffet receptions on the territory of farmstead and palace complexes, with immersion in the old times atmosphere, with providing the menu made in style of traditional Russian cuisine. Specific weight of the companies organizing as corporate food at offices, and transport, makes **% (at each type of service).

Peculiarity of the Petersburg market is that any of the presented companies is not accredited according to the specialized program: "CATERING PROFESSIONAL". One third

of organizations belonged to banquet service format type which could serve number of guests ranging from 500 to 1 thousand. More than one fifth of the offer (**%) is the share of companies working for smaller target audience (up to 500 persons).



**Segmentation of Saint Petersburg catering companies
by the main types of rendered services in June
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**Structure of catering companies Saint Petersburg by
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LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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ABOUT INTESCO RESEARCH GROUP

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INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and Regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

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