



**Intesco
Research
Group**

RUSSIAN PUBLIC CATERING MARKET



MOSCOW 2011

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INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY

METHODS OF RESEARCH

Subject of the research:

Russian public catering market

Goal of research:

Evaluation of market and main trends of its development

Region of research:

Russia and regions of RF, largest cities of RF

Main blocks of research:

CHARACTERISTICS OF RUSSIAN CONSUMERS

VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

THE NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF
RF

SHARE OF THE LARGEST CATERING NETWORKS (TOP-25) IN MOSCOW AND
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FORECAST OF THE RUSSIAN CATERING MARKET DEVELOPMENT

Field players analyzed:

The top 25 Russian catering networks

The largest Russian restaurant operators

Information sources used:

Federal State Statistics Service

Economic Development Ministry

Federal Custom Service

Field expert evaluations

Materials of the field's main players

Field print and electronic publications

The research contains 34 schedules, 19 diagrams and 11 tables.

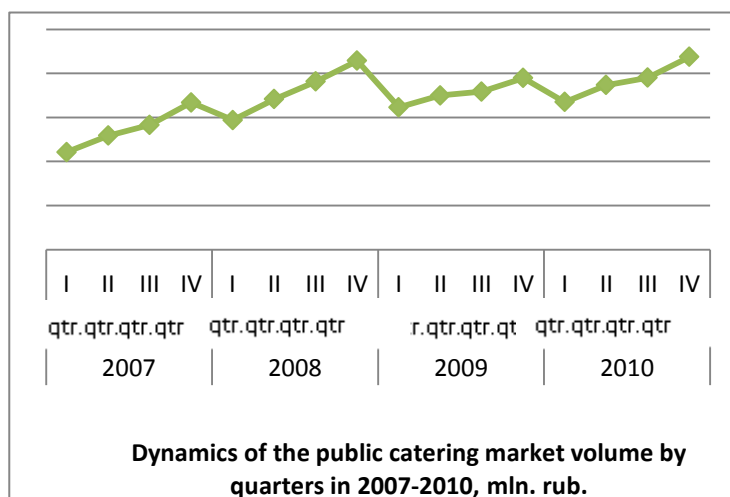
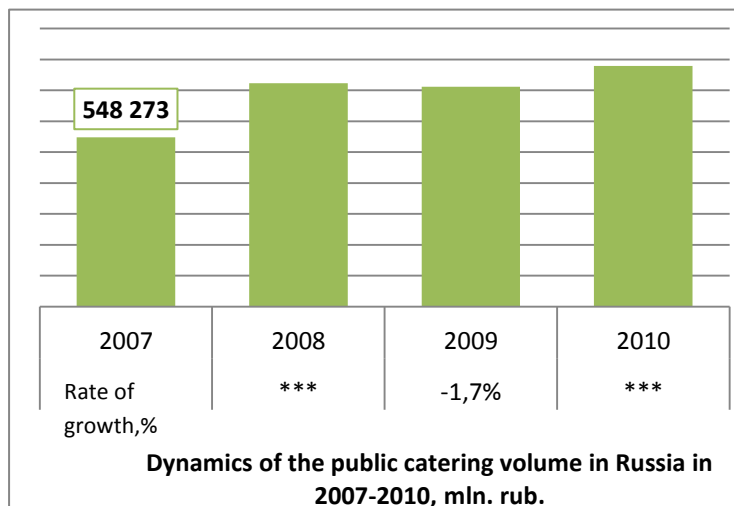
EXTRACTS FROM RESEARCH

CHAPTER 3

VOLUME OF RUSSIAN PUBLIC CATERING MARKET

In 2010 the Russian public catering market began to grow again after the slight decline of volumes (-1.7%) during the crisis in service industries in 2009. Aggregate turnover of the public catering in Russia made up *** billion rub. that is by *** % more than the year before.

Russian public catering market has seasonal character: the minimum turnover is observed in the first quarter of year (January), the largest – in the last quarter. In 2009, the seasonality occurred, but revenues of Russian catering facilities reduced. In 2010, the parameters were apt to grow.



December is the most profitable month for public catering market in RF: in 2010 the value for this month have exceeded that of December 2008 by ***%. In January there is a sharp reduction of turnover in the given segment of service industries.

CHAPTER 4

THE NUMBER OF PUBLIC CATERING FACILITIES IN MAJOR CITIES OF RF

According to the number of public catering facilities there are two leaders: Moscow and Saint Petersburg. It is important to note that only in the capital of Russia the number of restaurants exceeds that of cafes. It can be explained by the fact that Moscow has developed a so-called sector of democratic restaurants

Table. The largest enterprise networks of public catering by number of facilities on June 2011

№	Name of the network	Yaer of RF entry	Number of facilities
1	McDonalds	1990	278
2	Shocoladnitsa	1964 (2001)	***
3	Subway	2006	***
4	Coffee House	1999	***
5	Rostick's KFC	1993	***
6	L Patio	1993 (2004)	***
7	Eurasia	2001	***
8	Kroshka Kartoshka (stationary facilities)	1998	***
9	Suchi Planet	1999 (2006)	***
10	Teremok (stationary facilities)	1999	***

(the networks «Yaposha», «Yakitoriya», «TGI Friday's», etc.), which in many aspects are similar to cafes, but there is a higher level of service and average bill.

Table. Number of public catering facilities per inhabitant of the city, people

	Total	Number of potential visitors per public catering facility
Novosibirsk	***	1222
Kazan	***	1238
St. Petersburg	***	1312
Nizhny Novgorod	***	1454
Yekaterinburg	***	1482
Moscow	***	1634

The situation of the public catering facilities development is accurately characterized by the number of potential visitors per one place. According to this parameter Novosibirsk is on top. Kazan ranks second, St. Petersburg – third. One public catering facility of these cities has 1,2-1,3 thousand potential visitors.

The next three cities are Nizhny Novgorod, Yekaterinburg and Moscow.

CHAPTER 7

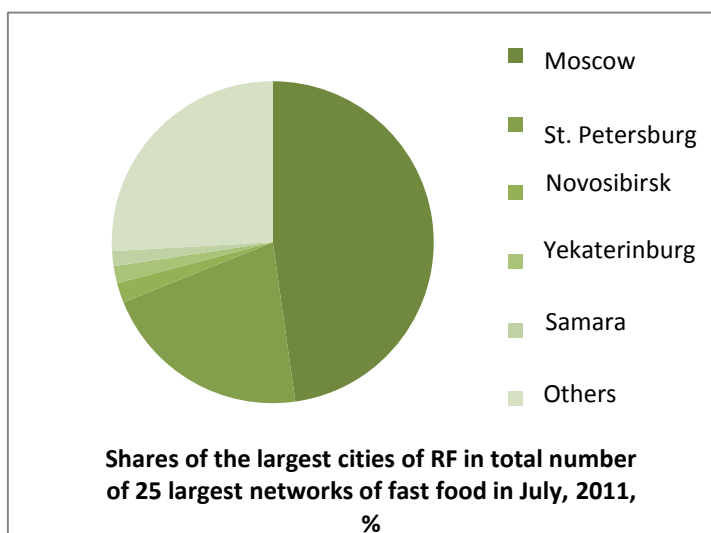
**RUSSIAN PUBLIC CATERING
MARKET**

Fast food market volume takes relatively small part of the overall turnover of the Russian public catering market. Nevertheless, share of fast food grows. In 2006, it was ***% and was slowly reducing before the crisis, because the fast food segment's rate of growth was slower than the growth rate of the branch as a whole. During the crisis, however, fast food segment was growing relatively fast, while most enterprises experienced sharp reduction of clients. So the fast food market's annual growth rates were about ***% and there is no reason to expect any decrease in the nearest future. Volume of the



public catering market made up almost *** billion rub. in 2010, while the fast food market share made up ***% of it. In 2010, the share of Moscow fast food (*** billion rub.) made up ***% of

the Russian market, which is a lot more, than the share of Moscow in the overall public catering turnover.



CHAPTER 8

RUSSIAN PRIVATE CATERING
MARKET

According to statistic data there are more than *** licensed private catering operators on Moscow public catering market, when there are not more than *** operators throughout Russia. According to Intesco Research Group, the share of Moscow in the volume of private catering market is

slightly more than ***%. Nowadays there are about *** large companies, which deal with outdoor events. Thus, as of July 2011, there are *** registered enterprises dealing with outdoor events. *** of them are located in Moscow, that is almost 60 %.

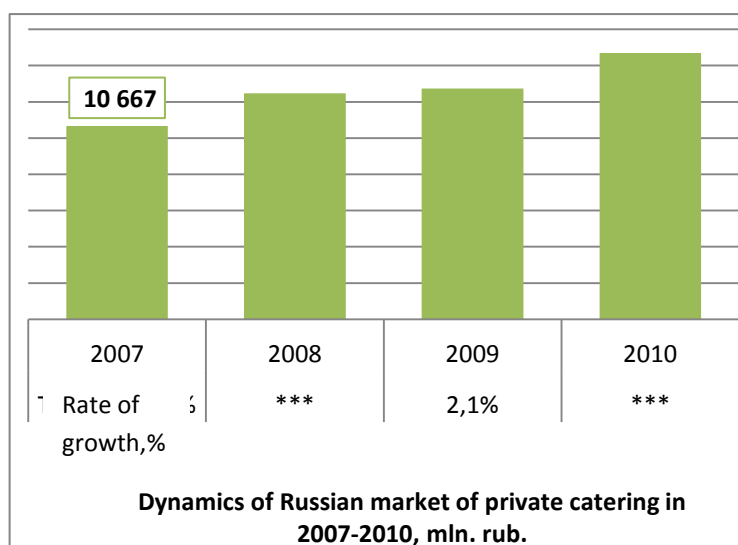
In 2010, the volume of Russian private catering market amounted to *** billion rub., which is ***% more than a year earlier. Share of private catering in the public catering market

made up **%, like in 2007, before crisis. In general, 2% - is not a large share, that shows, on the one hand, that branch develops poorly, and on the other hand, that it's determined to have high potential.

Moscow private catering market is more developed.

Table. The number of the largest private catering companies in Russian cities in July 2011

	Number of players	Share
Moscow	***	59%
Saint Petersburg	***	10%
Yekaterinburg	***	6%
Kazan	***	4%
Krasnodar	***	4%
Rostov-on-Don	***	4%
Others	***	13%
All the cities	***	100%



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Source: Intesco Research Group

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INFORMATION ABOUT INTESCO RESEARCH GROUP COMPANY

INTESCO RESEARCH GROUP – is the analytical group, having its principal directions of activity in development of high-quality business plans, feasibility studies and marketing researches of both Russia's and regional markets of RF. 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 research and development methods. When conducting marketing researches and developing the business plans the group 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.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: "Vedomosti", "Kommersant-Dengi", "Rossiyskaya gazeta", "Forbes", "Russian Food Market", "FoodService", "MAXIM", "Partner: myasopererabotka", "Moe delo. Magazin", "Odnako", "Khlebopekarnoe proizvodstvo", "Producty i Pribyl", "Konditerskaya sfera/khlebopechenie", "Tsenovik", "RBK daily", "Unipack.Ru", etc.

The following companies already became the clients of **INTESCO RESEARCH GROUP**:

Russian public catering market. Current situation and forecast.



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**