



**Intesco
Research
Group**

FAST FOOD AND FAST FOOD MARKET



MOSCOW 2014

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	5
EXTRACTS FROM RESEARCH.....	6
LIS OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES.....	9
ABOUT INTESCO RESEARCH GROUP.....	11

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. SUBJECT OF RESEARCH

- 1.1. Street outlets (Street food)
- 1.2. Fast food
- 1.3. Casual Dining
- 1.4. Fine Dining
- 1.5. Food Court

2. GENERAL ECONOMIC SITUATION IN RUSSIA

- 2.1. Population of Russia
 - Number of population*
 - Social standards of living dynamics*
 - Largest cities*
- 2.2. Moscow and Moscow Region
- 2.3. Saint Petersburg

3. RUSSIAN MARKET OF PUBLIC CATERING

- 3.1. Volume of Russian public catering market
 - Dynamics by years*
 - Dynamics by quarters*
 - Market volume in regions*
- 3.2. Public catering objects in regions
- 3.3. Regional specific features

4. VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

- 4.1. Market dynamics by years
- 4.2. Regional market structure
- 4.3. Largest fast food networks in million-strong cities

5. LARGEST PLAYERS ON PUBLIC CATERING MARKET

- 5.1. Rating of companies by number of outlets
- 5.2. Opening plans
- 5.3. Foreign companies
 - McDonald's*
 - KFC*
 - Subway*
 - Burger King*

Sbarro

Starbucks

5.4. Russian companies

Stardog!s

Chaynaya lozhka

Kroshka-Kartoshka

Teremok

Podorozhnik

Traveler's Coffee

5.5. Healthy nutrition fast food

Prime-star

Healthy food

6. TRENDS ON PUBLIC CATERING MARKET

6.1. Focus on regional development

6.2. Russian filling of foreign fast-food

6.3. Networking fast food prevailing

6.4. Bankruptcy of fast food market players

6.5. Franchising scheme on public catering market

Factors limiting franchising development

6.6. Novelties on public catering market

Soup fast food

Arctic fast food

7. STATE REGULATIONS OF THE MARKET

7.1. Regulations

7.2. Strategy of trade development in RF for 2011-2015 and until 2020

8. CONSUMER PREFERENCES

8.1. Eating out expenses

8.2. Structure of public catering facilities visits

Moscow residents preferences

Consumer image of McDonald's

Preferences by location of public catering networks in cities

9. FORECAST OF THE RUSSIAN FAST FOOD MARKET

ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

FAST FOOD MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR
2014-2016

Regions of research:

RUSSIA AND LARGEST CITIES, REGIONS OF RF

Main blocks of research:

GENERAL ECONOMIC SITUATION IN RUSSIA

RUSSIAN PUBLIC CATERING MARKET

RUSSIAN FAST FOOD MARKET VOLUME

LARGEST PLAYERS ON FAST FOOD MARKET

TRENDS ON FAST FOOD MARKET

STATE REGULATIONS OF THE MARKET

CONSUMER PREFERENCES

FORECAST OF FAST FOOD MARKET

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

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 16 schedules, 9 diagrams, 10 tables and 1 picture.

EXTRACTS FROM RESEARCH

CHAPTER 3

*VOLUME OF THE RUSSIAN FAST
FOOD MARKET*

As for 2013 public catering market turnover reached ** billion rubles and per capita parameter amounted to ** rub/person. In the closets time a slight slowing down of the growth is expected due to new wave of crisis in Russia. As practice shows in these periods people tend to decrease expenses for entertainment and eating out.

Russian public catering market is characterized by seasonality: the minimum turnover is observed in the first quarter of the year (January), the largest – in the last quarter. In 2009 a considerable decrease in the growth rates was observed in 2009 with the seasonality preserved, but revenues of Russian catering facilities were by 7,5% lower in the second half of the year than in the previous year. In 2010 the parameters were apt to grow.

In the last quarter proceeds of public catering facilities were higher. It was due to high demand for corporate events in café and restaurants. Besides, the growth was also due to pricing on the market of restaurant services during this period, prices in the menu increase by 5-10%.

CHAPTER 4

RUSSIAN PUBLIC CATERING
MARKET VOLUME

During 2008-2012 fast food market increased dynamically and even in the crisis 2009, when the largest part of enterprises were short of the clients flow, fast food continued to grow with relatively high rates: public catering market in general decreased by 1,6%, and fast food segment increased by **,4%.

In 2013 rate of the market growth slowed down to **%. It was due to saturation of large cities markets, on the one hand, and Russian economy slowing down on the other hand. Studies showed that during the pre-crisis period people decrease eating out expenses. In particular, public catering market will not be so affected (judging by 2009) but the growth will slow down.

In 2013 market turnover increased by **%, and reached ** billion rubles. It amounted to

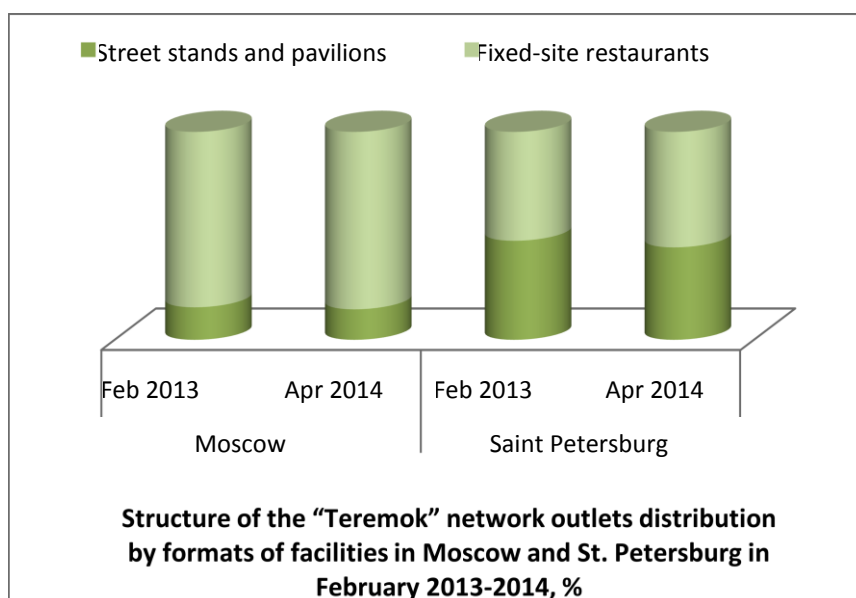


**,1% of public catering market in general. Compared to 2007 this parameter was equal to **,4%.

The main trend of the market is regional expansion. Fast food networks strengthened their positions in two

capitals and began to develop in regions of Siberia, Ural and Southern Regions. In the closest future their growth will be moderate and systematic.

CHAPTER5

LARGEST PLAYERS OF FAST
FOOD MARKET

"Teremok" is a Russian fast food network, presented nowadays in Moscow and St. Petersburg. Сейчас Now "Teremok" is represented by 3 formats: street stands, fixed-site restaurants and food courts in the shopping centers.

In the street stands only pancakes are sold, and in fixed-site restaurants cereals and soups added into the range of products.

As of April, 2014 "Teremok" network in Moscow and Moscow Region was represented by ** cafes where the share of street stands made only **objects or 14,7% (all of them are located in the capital). In St. Petersburg **cafes functioned, and about a half of them worked in street stands format.

In 2013 their turnover was estimated by the owner of the company - Mikhail Goncharov at ** billion rubles in Moscow and ** billion rubles in St. Petersburg. Two more sale points were opened on franchise as an experiment: in Tyumen and Surgut. At the end of 2013 "Teremok" opened in Krasnodar. The choice of the city is determined by the fact that Krasnodar is the leader of all business ratings, and also a large number of shopping centers.

LIS OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. SUBJECT OF RESEARCH

2. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Dynamics of population of Russia in three forecast variants in 2011-2031, ths people

Schedule 2. Dynamics of actual household disposable income of population and annual rate of growth in 2000-2012, %

Table 1. Number of population in largest cities of Russia according to Census of 2002 and 2010 and as for January 1, 2013, ths people

Schedule 3. Dynamics of constant population of Moscow for the 1st of January in 2001-2012, mln. peop.

Diagram 1. Dynamics of constant population of Moscow Region as for January 1 in 2000-2013, mln people

Schedule 4. Dynamics of actual disposable money income in Moscow by years in 2003-2013* ths rubles

Table 2. Average monthly salary in Moscow in general and in cafes, restaurants by years in 2002-2013, rub

Schedule 5. Per capita money incomes of population of Moscow in 2009-2013, ths rubles

Table 3. Per capita money incomes of the population of Moscow by months in 2009-2013, rubles

Schedule 6. Share of eating out expenses of residents of Moscow for in 2000-2013*, %

Schedule 7. Dynamics of constant population of Saint Petersburg in 2001-2014* (actual as for 01.01.2014), mln people

Schedule 8. Dynamics of constant population of Leningrad region in 2000-2014* (actual as for 01.01.2014), mln people

Schedule 9. Dynamics of average monthly wage of the resident of Saint Petersburg by years in 2002-2013, ths rubles

Table 4. Average monthly salary in St. Petersburg in general and in cafes, restaurants by years in 2002-2013, rubles

Schedule 11. Share of expenditures for public catering services in total volume of expenditures for services in 2004-2012*, %

3. RUSSIAN MARKET OF PUBLIC CATERING

Schedule 12. Dynamics of the Russian public catering market turnover and per capita in RF in 2003-2013

Schedule 13. Dynamics of the Russian public catering market volume by quarters in 2007-2013, billion rubles

Table 5. Volumes of public catering market turnover in regions of RF in 2008-2012, million rubles

Diagram 3. Change of regional structure of public catering market turnover in 2008-2012, %

Table 6. Number of public catering facilities in 2011-2012, units

4. VOLUME OF THE RUSSIAN FAST FOOD MARKET

Schedule 14. Russian fast food market turnover in 2007-2013, billion rubles

Diagram 4. Structure of fast food market by size of cities in cost terms in 2013, %

Table 7. Largest fast food networks in million-strong cities

5. LARGEST PLAYERS ON PUBLIC CATERING MARKET

Table 8. Largest fast food networks in Russia by number of outlets in 2012-2014, units

Table 9. Financials of «Cofe Sirena» LLC, ths rubles

Diagram 5. Structure of facilities distribution of «Teremok» network by formats of enterprises in Moscow and Saint Petersburg in 2013-2014, %

6. TRENDS ON PUBLIC CATERING MARKET

Diagram 6. Share of Moscow and Saint Petersburg in public catering market structure in 2008-2012, %

Picture1. Geography of burgers components of KFC, Burger King and McDonald's production in 2014

Table 10. Largest networks on fast food market by number of franchising outlets as for March 2014, units

7. STATE REGULATIONS OF THE MARKET

8. CONSUMER PREFERENCES

Diagram 7. Russian residents stance on eating out, as on costly affair, in 2012, %

Schedule 15. Average expenditures in public catering facilities in different regions of the world in 2007, 2012 and forecast for 2017, dollar/person

Diagram 8. Structure of feeding arrangement of working Russian population during the working day, %

Diagram 9. Structure of McDonald's target audience, %

9. FORECAST OF THE RUSSIAN FAST FOOD MARKET

Schedule 16. Russian catering market turnover in 2010-2013 and forecast for 2014-2016, billion rubles

ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

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.

OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
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