



**Intesco
Research
Group**

RUSSIAN PUBLIC CATERING MARKET



MOSCOW 2014

TABLE OF CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY	7
EXTRACTS FROM RESEARCH.....	8
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	11
ABOUT INTESCO RESEARCH GROUP	17

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS AND TABLES

1. CHARACTERISTICS OF RUSSIAN CONSUMERS

1.1. Russia (in general)

Population size dynamics

Social standard of living

Largest RF regions

Dynamics of the social standard of living in the largest regions

Largest cities

1.2. Moscow and Moscow Region

1.3. St. Petersburg

2. SUBJECT OF RESEARCH

2.1. Characteristics of the branch

Public catering

Private catering

2.2. Classification of public catering facilities

Russian classification by formats

International classification of public catering facilities

3. VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

3.1. Russian public catering market

Dynamics of market volume by years

Dynamics by quarters

Turnover of Russian public catering market comparing to other countries

Costs of eating out

3.2. The largest regions of RF by the public catering turnover

The public catering turnover in federal districts

Public catering market turnover in subjects of RF

Volume of public catering market in Moscow

Market volume of St. Petersburg public catering

Public catering turnover in Russian megacities

Regional preferences

3.3. Consumer preferences in the Russian public catering market

Consumer preferences according to formats of public catering facilities in Russian cities

Market leaders by attendance in the largest cities

Preferences of Moscow residents

Consumer image of public catering facilities

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

4.1. Total number of public catering facilities in Russian million-strong cities

4.2. Number of public catering facilities in Russian megacities

Moscow

By administrative districts

Peculiarities of public catering facilities in the Moscow market

St. Petersburg

5. LARGEST NETWORKS OF RUSSIAN PUBLIC CATERING FACILITIES

5.1. Structure of RF public catering market

5.2. Largest networks of Russian public catering facilities

Fast food

Coffee houses

Quick Casual

Outdoor cafes

Public catering in shops

5.3. The largest Russian restaurant operators according to the number of facilities

The largest market players ranking

Information about the largest market players

5.4. Number of facilities of the largest public catering networks in Moscow and St. Petersburg

The largest networks in Moscow

The largest networks in St. Petersburg

6. TRENDS IN THE RUSSIAN PUBLIC CATERING MARKET

6.1. General trends of the market

6.2. Public catering in residential areas

6.3. Labor market of the restaurant market

6.4. Public catering in «non-format places»

6.5. Vending machines, take-out

6.6. Frozen bakery products in the public catering market of Russia

7. RUSSIAN FAST FOOD MARKET

7.1. Volume of Russian fast food market

Market dynamics by years

Regional structure of the market

The largest fast food networks in megacities

7.2. The largest players in fast food market

Rating of companies according to the number of outlets

Plans for opening

Foreign compnaies

Russian companies

7.3. Healthy fast food

7.4. Moscow fast food market

Share of Moscow in the public catering and fast food turnover

Share of Moscow in the number of the largest public catering networks

The largest fast food networks in the Russian and Moscow markets

Structure of fast food market by type of cuisine in Moscow

Geographical location of outlets of the largest fast food networks in Moscow

7.5. Trends in fast food market

The bet on regional development

Russian filling of foreign fast food

The predominance of the networked fast food

Bankruptcy of players in fast food market

Franchising in public catering market

New units in fast food market

8. RUSSIAN PRIVATE CATERING MARKET

8.1. General characteristics of the market

8.2. Volume of the Russian and Moscow catering market

8.3. Facilities in the Russian private catering market

Regional structure of the market

Company segmentation by main types of services

8.4. Stationery and event catering market in Moscow

Company segmentation by main types of services

Company segmentation by type and scale of activities

Characteristics of companies

8.5. Stationery and event catering market in St. Petersburg

Company segmentation by main types of services

Company segmentation by type and scale of activities

Characteristics of companies

8.6. Stationery and event catering in RF regions

Company segmentation by main types of services

Characteristics of companies

8.7. Transport catering market

Catering in trains

Catering in aircrafts

8.8. Largest companies on Russian catering market

Largest companies on Moscow market

Largest companies on Saint Petersburg market

8.9. Trends on Russian catering market

Concept of events organization "on a key-turn basis"

Innovative companies of Moscow market

Premium class service

«CATERING PROFESSIONAL» accreditation program

Franchising networks development

Concept of franchising enterprise

Starting package for the organization and development of catering service

8.10. Factors influencing catering services market

Seasonality problem

Solvent demand

Service standards and quality control

Employed personnel

9. FORECAST OF RUSSIAN CATERING MARKET FOR 2016

ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

RUSSIAN PUBLIC CATERING MARKET

Goal of research:

EVALUATION OF THE MARKET AND IDENTIFYING OF THE MAIN TRENDS OF ITS DEVELOPMENT FOR 2016

Регион исследования:

RUSSIA, RF REGIONS

Regions of research:

CHARACTERISTICS OF RUSSIAN CONSUMERS
VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET
NUMBER OF PUBLIC CATERING FACILITIES IN THE LARGEST CITIES OF RF
LARGEST NETWORKS OF RUSSIAN PUBLIC CATERING FACILITIES
TRENDS IN THE RUSSIAN PUBLIC CATERING MARKET
RUSSIAN FAST FOOD MARKET
RUSSIAN PRIVATE CATERING MARKET
FORECAST OF THE RUSSIAN PUBLIC CATERING MARKET DEVELOPMENT FOR 2016

Field players analyzed:

The largest Russian public catering networks
The largest Russian restaurant operators and catering companies in Russia

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 48 schedules, 50 diagrams, 41 tables and 1 scheme.

EXTRACTS FROM RESEARCH

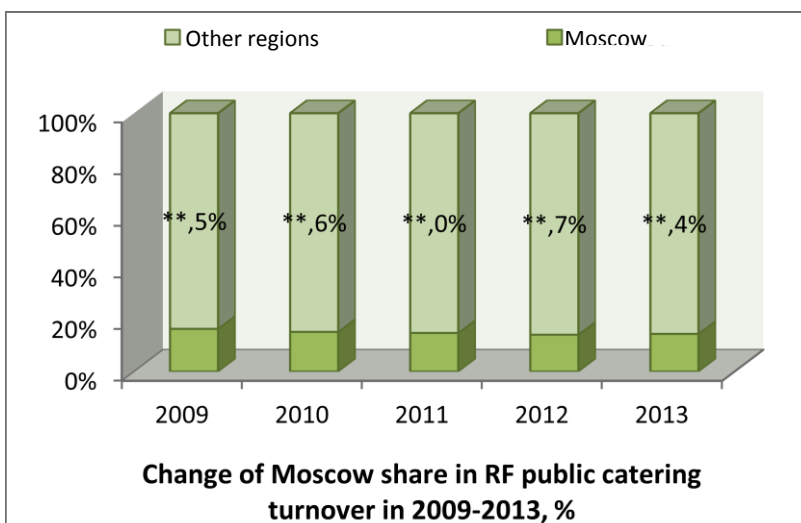
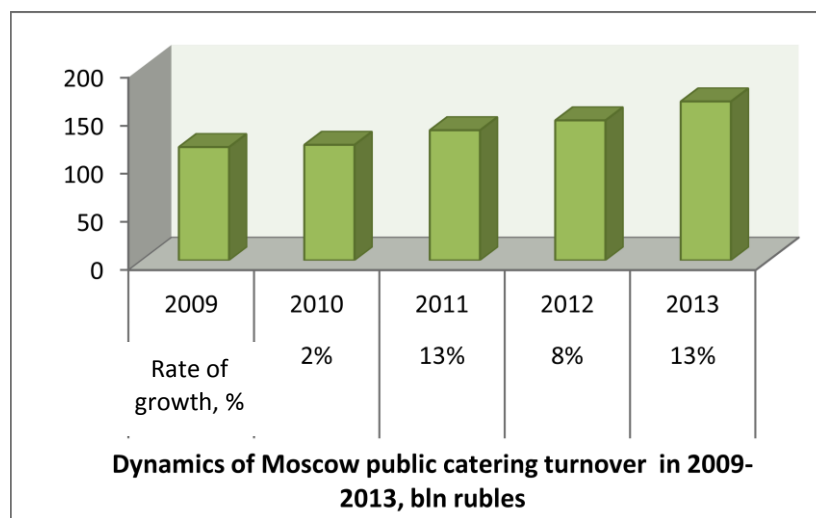
CHAPTER 3

VOLUME OF RUSSIAN PUBLIC CATERING MARKET

Volume of Moscow public catering market in 2009 amounted to 115,8 billion rubles.

During three quarters of 2010 public catering market turnover reached the parameter of **,9 billion rubles, that was 0,* billion rubles more, than the same parameter in January-September 2009.

In 2013 volume of Moscow restaurants, bars and cafes and canteens market reached *** billion rubles. High rate of growth at the level of 13% allows to talk about a new stage of Moscow public catering market development associated to new players appearance, in particular, in fast-food sector.

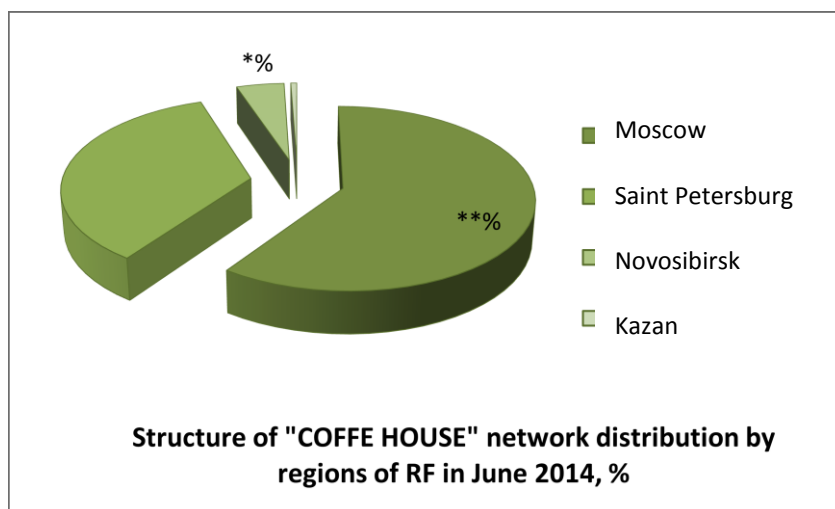


If we consider the share of Moscow in total volume of Russian public catering market in the dynamics, we can mark the trend to decrease of parameters. From 2009 to 2013 it decreased by 1,9 % (from **,5% to **,6%). Total decrease of the aggregate share of Moscow market reflects not the parameters decrease in Moscow but the increase of RF market capacity due to regional development (for example, in Krasnodar Territory).

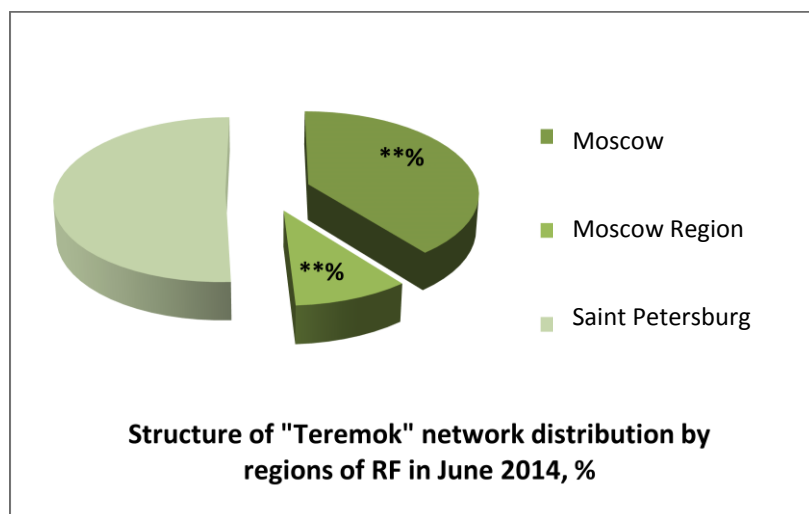
CHAPTER 5

LARGEST PUBLIC CATERING NETWORKS

Today “SHOKOLADNITSA” coffee houses network is one of the most dynamically developing companies in restaurants business sphere in Moscow, regions of Russia and CIS countries and is one of the main competitors of «COFFEE HOUSE» network. In structure of the network distribution in June 2014 more than half of outlets operated on the territory of Moscow (**%), slightly less one tenth – in Saint Petersburg (**%). In Moscow Region *,9% of total number of «SHOKOLADNITSA» coffee houses located. *,4 % of enterprises were located in Yekaterinburg and Nizhny Novgorod.



In June 2014 share of Moscow in regional structure of “TEREMOK” network distribution on the territory of RF reached **%, Moscow Region (**%). In Saint Petersburg more than half of all network outlets are located. Today «TEREMOK» is represented in three formats: street stands, fixed-side cafes and trade centers food courts.



CHAPTER 8

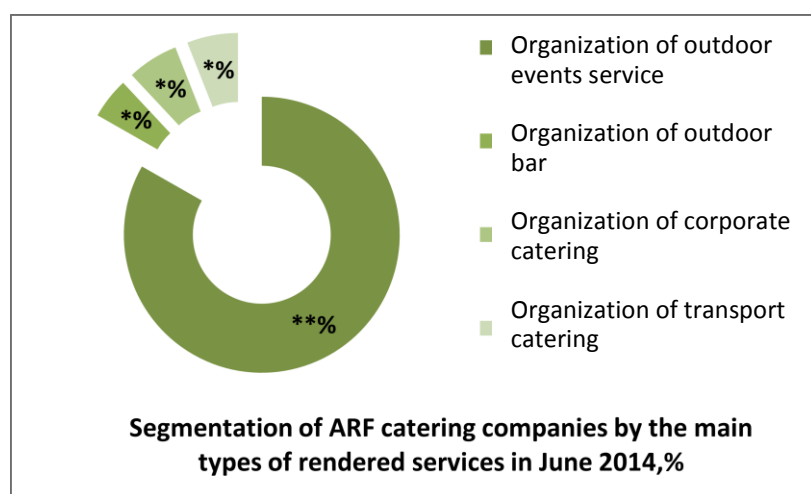
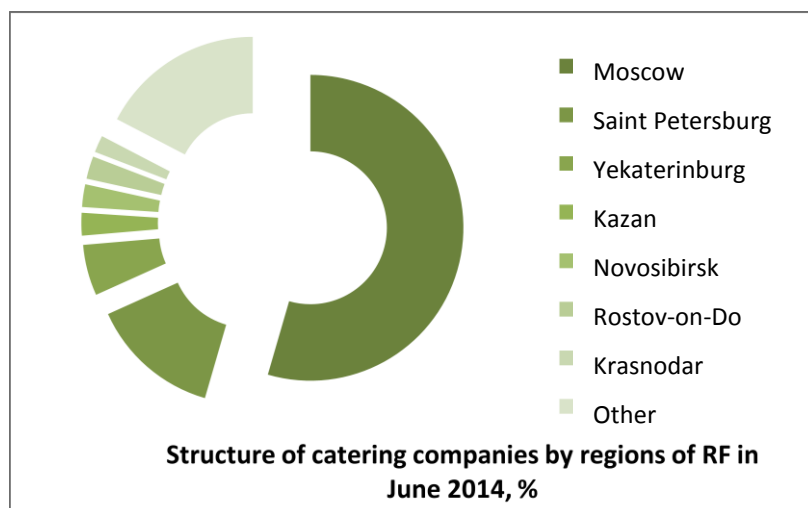
RUSSIAN CATERING MARKET

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 (with shares in total number of companies - ** and **% respectively), Distribution is influenced, certainly, by number of consumers, as at present, and possible in the long term. What 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 (menu, registration, entertainment program). For example, Summer University games of 2013 in Kazan, Winter Olympic Games in Sochi in 2014, etc.

By 2014 the main specialization of catering companies functioning on the Russian public catering market and service is organization of

events (buffet receptions, banquets, buffets, barbecue, etc.) or event catering. This type of activity is carried out by **% of the companies working in the catering segment in the Russian Federation reflects

how narrowly this business is developed in the country.



LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

МЕТОДОЛОГИЯ ПРОВЕДЕНИЯ ИССЛЕДОВАНИЯ

СПИСОК SCHEDULEОВ, ДИАГРАММ И ТАБЛИЦ

1. CHARACTERISTICS OF RUSSIAN CONSUMERS

Schedule 1. Dynamics of the population size in Russia in 3 scenarios in 2011-2031, ths. peop.

Schedule 2. Dynamics of actual disposable money profit and its annual growth rate in 2000-2013, %

Table 1. Population size in the largest regions of RF in 2000-2010 and its forecast for 2010-2020

Table 2. Average per capita income in the regions of RF in 2011-2012, rub.

Table 3. Population of the largest Russian cities according to the National Census in 2002 and 2010 and by 1 January 2013, ths. peop.

Schedule 3. Dynamics of constant population of Moscow for the 1st of January in 2000-2014* (as of 01.11.2013), mln. peop.

Diagram 1. Dynamics of constant population size in Moscow region for the 1st of January in 2000-2013, mln. peop.

Schedule 4. Dynamics of average salary in Moscow by years in 2003-2013*, ths. rub.

Table 4. Average monthly salary in Moscow in general and in cafes, restaurants by years in 2003-2013*, rub.

Schedule 5. Actual disposable money income in Moscow 2009-2013, ths. rub.

Table 5. Average money income of Moscow residents by months in 2009-2013, rub.

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

Schedule 7. Dynamics of constant population size in St. Petersburg in 2001-2014* (as for 01.01.2014), mln. peop.

Diagram 2. Structure of the population distribution in administrative districts of St. Petersburg in 2013, %

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

Schedule 9. Dynamics of average monthly salary of St. Petersburg resident by years in 2002-2013, ths. rub.

Table 6. Average monthly salary in St. Petersburg in general and in cafes, restaurants by years in 2002-2013, rub.

Schedule 10. Average per capita money income of St. Petersburg residents in 2007-2012, ths. rub.

Schedule 11. Share of expenses for catering services in the total volume of service expenses in 2004-2012*, %

2. SUBJECT OF RESEARCH

3. VOLUME OF THE RUSSIAN PUBLIC CATERING MARKET

- Schedule 12. Dynamics of per capita Russian public catering market turnover in 2003-2013
- Schedule 13. Dynamics of the Russian public catering market volume by quarters in 2007-2013, bln. rub.
- Schedule 14. Turnover of the retail business in some European countries in 2012 г., bln. USD.
- Schedule 15. Share of expenses on public catering by countries of Europe in 2012, %
- Table 7. Ranking of some European countries in household expenditure on food, alcohol and tobacco, restaurants, cafes, hotels, leisure activities and culture in 2012, %
- Diagram 3. Russian citizens' considering eating out expensive in 2012, %
- Table 8. Eating out expenses by regions of RF in 2009-2011, rub.
- Table 9. Public catering turnover in federal districts in 2009-2013, mln. rub.
- Schedule 16. Dynamics of the Russian public catering market turnover in the largest federal districts of RF in 2011-2013, mln. rub.
- Diagram 4. Changes in the structure of the Russian public catering market turnover by federal districts in 2011-2013, %
- Table 10. Turnover volumes of public catering market in regions of RF in 2009-2012\3, mln. rub.
- Schedule 17. Dynamics of the Russian public catering market turnover in main regions of RF in 2011-2013, mln. rub.
- Diagram 5. Changes in the regional structure of the Russian public catering market turnover in 2009-2013, %
- Schedule 18. Dynamics of Moscow public catering market turnover in 2009-2013, bln. rub.
- Diagram 6. Changes in the Moscow share in the public catering market turnover in Russia in 2009-2013, %
- Table 11. Revenue dynamics from restaurants, canteens and bars (minus taxes, excise taxes, etc..) in Moscow in 2009-2013, mln. rub.
- Schedule 19. Dynamics of St. Petersburg public catering market turnover in 2009-2013, bln. rub.
- Schedule 20. Changes in the share of St. Petersburg in the Russian public catering market turnover in 2009-2013, %
- Schedule 21. Turnover of the public catering in megacities of RF in 2011, bln. rub.
- Schedule 22. Per capita public catering turnover in megacities of RF in 2011, ths. rub./peop.
- Table 12. Megacities shares in the total RF population and in the overall turnover of the public catering facilities of RF in 2011, %
- Schedule 23. Visiting the public catering facilities of different formats by city inhabitants in 2011, % of respondents, visiting the given format within last year
- Schedule 24. Visiting the public catering facilities of certain formats by city inhabitants in 2012, % of respondents, visiting the given format within last year
- Schedule 25. Average costs in catering establishments in different regions of the world in 2007, 2012 and forecast for 2017, USD/peop.
- Diagram 7. Structure of meal organization by the Russian working population during the working day, %

Schedule 26. Rated changes that the Russians want to see in restaurants, cafes and bars in 2013, %

Schedule 27. The most popular public catering chains in Russian cities in 2012, %

Schedule 28. The most popular chains of democratic restaurants in Moscow and Moscow Region in 2012, %

Diagram 8. The structure of the target audience of McDonald's, %

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

Table 13. Availability of public catering facilities by districts and regions of RF by the beginning of 2012

Table 14. Number of cafes and restaurants in the largest cities of RF as of February 2013

Schedule 29. Dynamics of the number of public catering facilities in Moscow in 2009-2013, ths. objects

Table 15. Dynamics of the number of public catering facilities in Moscow in 2011-2013, objects

Diagram 9. Dynamics of the catering facilities of an open network in the structure of public catering in Moscow in 2011 – 2013, %

Diagram 10. Structure of Moscow public catering market by types of facilities in 2013, %

Schedule 30. Dynamics of the number of seats in the public catering facilities in Moscow in 2007-2013 (as of 01.10.2013) per 1 ths. residents

Table 16. Dynamics of the number of seats in the public catering facilities in Moscow by administrative districts in 2010-2013 per 1 ths. peop.

Schedule 31. Number of seats in the public catering facilities in Moscow by administrative districts in 2013 per 1 ths. peop

Schedule 32. Rated areas of Moscow in the number of seats in 2013 (as of 01.10.2013) per 1 ths. peop.

Diagram 11. Detailed structure of public catering facilities by types of institutions in Moscow at the beginning of 2014, %

Schedule 33. Structure of public catering facilities in Moscow by types of cuisine at the beginning of 2014, units

Diagram 12. Structure of resuarants and cafes in Moscow by an average ticket in June 2014, %

Diagram 13. Structure of public catering market by areas by the number of facilities in 2011, %

Schedule 34. Dynamics of the number of public catering facilities in St. Petersburg in 2009-2013, units

Schedule 35. Number of seats in public catering facilities in St. Petersburg by districts in 2013 per 1 ths. peop.

Schedule 36. Satisfaction of the population with the number of catering facilities in districts of St. Petersburg in 2011-2013, %

Schedule 37. Rated provision of public catering facilities of different types (proportion of affirmative answers to the question about the lack of certain types) in 2011-2013, %

Schedule 38. Detailed structure of public catering facilities by types of institutions in St. Petersburg in June 2014, %

Schedule 39. Structure of public catering facilities in St. Petersburg by types of cuisines in June 2014, units

Schedule 40. Structure of resuarants and cafes in St. Petersburg by an average ticket in June 2014, %

5. LARGEST NETWORKS OF RUSSIAN PUBLIC CATERING FACILITIES

Diagram 14. Structure of the Russian public catering market in 2013, %

Schedule 41. Dynamics of the number of public catering facilities of international networks in the Russian market in 2011-2013, units

Schedule 42. Dynamics of the number of networked restaurants, cafes and bars in the Russian market in 2011-2013, units

Diagram 15. Structure of net market of public catering facilities by types in 2012, % of the total number of network facilities

Schedule 43. The largest networks of public catering facilities by the number of outlets in RF in June 2014

Diagram 16. Geographical structure of public catering market in Russia by the number of network outlets in 2012, % of the total number of network facilities

Table 17. Outlet distribution in «KFC» network by regions of RF in June 2014, units

Diagram 17. Structure of distribution of «KFC» restaurants by RF regions in June 2014, %

Diagram 18. Structure of distribution of «SUBWAY» restaurants by RF regions in June 2014, %

Table 18. Outlet distribution of «BURGER KING» networks by RF regions in June 2014, units

Diagram 19. Structure of distribution of «BURGER KING» restaurants by RF regions in June 2014, %

Table 19. Outlet distribution of «SHKOLADNITSA» networks by RF regions in June 2014, units

Diagram 20. Distribution structure of the “SHKOLADNITSA” coffee houses by the Russian cities in June 2014, %

Diagram 21. Structure of distribution of «COFFEE HOUSE» restaurants by RF regions in June 2014, %

Diagram 22. Structure of distribution of «STARBUCKS» restaurants by RF regions in June 2014, %

Table 20. Outlet distribution of «BASKIN ROBBINS» networks by RF regions in June 2014, units

Diagram 23. Structure of distribution of «BASKIN ROBBINS» restaurants by RF regions in June 2014, %

Table 21. Outlet distribution of «IL PATIO» networks by RF regions in June 2014, units

Table 22. Outlet distribution of «SUSHI PLANET» networks by RF regions in June 2014, units

Diagram 24. Structure of distribution of «KRUSHKA» restaurants by RF regions in June 2014, %

Table 23. Outlet distribution of «SBARRO» networks by RF regions in June 2014, units

Diagram 25. Structure of distribution of «SBARRO» restaurants by RF regions in June 2014, %

Table 24. Outlet distribution of «YAKITORIA» networks by RF regions in June 2014, units

Diagram 26. Structure of distribution of «YAKITORIA» restaurants by RF regions in June 2014, %

Table 25. Structure of distribution of «ELKI-PALKI» restaurants by RF regions in June 2014, %

Diagram 27. Structure of distribution of «ELKI-PALKI» restaurants by RF regions in June 2014, %

Table 26. Outlet distribution of «STARDOG!S» networks by RF regions in June 2014, units

Diagram 28. Structure of distribution of «STARDOG!S» restaurants by RF regions in June 2014, %

Table 27. Outlet distribution of «KROSHKA KARTOSHKKA» networks by RF regions in June 2014, units

Diagram 29. Structure of distribution of «KROSHKA KARTOSHKKA» restaurants by RF regions in June 2014, %

Diagram 30. Structure of distribution of «TEREMOK» restaurants by RF regions in June 2014, %

Table 28. Shops with a catering area in Russia

Table 29. The largest restaurant operators of the public catering facilities by the number of outlets of RF, Moscow and St. Petersburg as of June 2014

Diagram 31. Distribution of «ROSINTER RESTAURANTS» by regions in March 2014, units

Diagram 32. Distribution of «ROSINTER RESTAURANTS» on the territory of Russia in March 2014, units

Table 30. The largest networks in the public catering market in Moscow in June 2014, units

Schedule 44. The share of the largest players in the total number of public catering facilities in Moscow in June 2014, %

Table 31. The largest networks in the public catering market in St. Petersburg in June 2014, units

Schedule 45. The share of the largest players in the total number of public catering facilities in St. Petersburg in June 2014, %

6. TRENDS IN THE RUSSIAN PUBLIC CATERING MARKET

7. RUSSIAN FAST FOOD MARKET

Schedule 46. Turnover of the public catering market in 2007-2013, bln. rub.

Diagram 33. Structure of fast food market on the scale of cities in money terms in 2013, %

Table 32. The biggest fast food chains in megacities of the Russian Federation

Table 33. The largest fast food networks by the number of outlets in RF in 2012-2014, units

Table 34. Financial indicators of the company «Coffee Sirena» LLC, ths. rub.

Diagram 34. Structure of the “Teremok” network outlets distribution by formats of facilities in Moscow and St. Petersburg in 2013-2014, %

Diagram 35. The share of Moscow in the public catering turnover in 2011, %

Diagram 36. The share of Moscow in the total number of 15 largest networks in July 2012, %

Table 35. The largest public catering networks of Moscow by number of facilities in July 2012

Diagram 37. The largest fast food networks by revenues in Russia in 2011, %

Diagram 38. Structure of the Moscow fast food market by types of cuisine in February 2013, %

Diagram 39. The share of Moscow and St. Petersburg in the structure of the public catering market in 2008-2012, %

Scheme 1. Geography of production of burger components for KFC, Burger King and McDonald's in 2014

Table 36. The largest network in fast food market by number of franchised outlets as of March 2014, units

8. RUSSIAN PRIVATE CATERING MARKET

Schedule 47. Turnover of the Russian catering market in 2007-2013, bln. rub.

Diagram 40. Structure of the catering companies by regions of RF in June 2014, %

Table 37. The number the largest catering companies in the cities of Russia in June 2014

Diagram 41. Share of companies accredited under the program «CATERING PROFESSIONAL» in the total number of catering companies in Russia in June 2014, %

Diagram 42. Segmentation of catering Russian companies by the main types of services in June 2014, %

Diagram 43. Share of companies accredited under the program «CATERING PROFESSIONAL» in the total number of catering companies in Moscow in June 2014, %

Diagram 44. Segmentation of catering companies in Moscow by the main types of services in June 2014, %

Diagram 45. Structure of catering companies in Moscow by the maximum number of guests at event service (banquet format) in June 2014, %

Diagram 46. Structure of catering companies in Moscow by the maximum number of guests at event service (standing reception format) in June 2014, %

Table 38. Catering companies in Moscow in 2014

Diagram 47. Segmentation of catering companies in St. Petersburg by the main types of services in June 2014, %

Diagram 48. Structure of catering companies in St. Petersburg by the maximum number of guests at event service (banquet format) in June 2014, %

Diagram 49. Structure of catering companies in St. Petersburg by the maximum number of guests at event service (standing reception format) in June 2014, %

Table 39. Catering companies in St. Petersburg in 2014

Diagram 50. Segmentation of catering companies in RF regions (excluding Moscow and St. Petersburg) by the main types of services in June 2014, %

Table 40. Catering companies in some RF regions in June 2014

9. RUSSIAN PUBLIC CATERING MARKET DEVELOPMENT FOR 2014-2016

Schedule 48. Volume of public catering market (в т.ч. быстрого питания и кейтеринга) в 2010-2013 гг. и прогноз на 2014-2016 гг., млрд руб.

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.

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