



**Intesco  
Research  
Group**

# BOOKS RETAILING AND RUSSIAN MARKET OF BOOKS RETAILING. CURRENT SITUATION AND FORECAST



MOSCOW 2012

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## **ABOUT INTESCO RESEARCH GROUP**

## RESEARCH METHODOLOGY

**Subject of research:**

RUSSIAN BOOKS MARKET AND RETAIL CHAINS

**Goal of research:**

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS DEVELOPMENT FOR 2012-2014

**Regions of research:**

RUSSIA, REGIONS OF RF

**Basic units of research:**

GENERAL ECONOMIC SITUATION IN RUSSIA

SUBJECT OF RESEARCH:

WORLD MARKET OF BOOKSELLING

VOLUME OF RUSSIAN BOOKSELLING MARKET

BOOKS PRODUCTION IN RUSSIA

THE LARGEST PLAYERS ON THE MARKET OF BOOKS PRODUCTION

CHANNELS OF SALES

THE LARGEST PLAYERS ON THE ON-LINE MARKET OF BOOKS PRODUCTION

MARKET OF ELECTRONIC BOOKS

FACTORS AFFECTING RUSSIAN BOOK MARKET

TRENDS ON THE RUSSIAN MARKET OF BOOKS PRODUCTION

FORECAST OF DEVELOPMENT OF BOOKS RETAILING

**Information sources used:**

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Custom Service

Federal Tax Service

Evaluation of Experts of the Branch

Retail sales statements

Data of the main players of the branch

Printed and electronic publications of the branch

**The research contains 39 Schedules, 34 Diagrams, 6 Tables.**

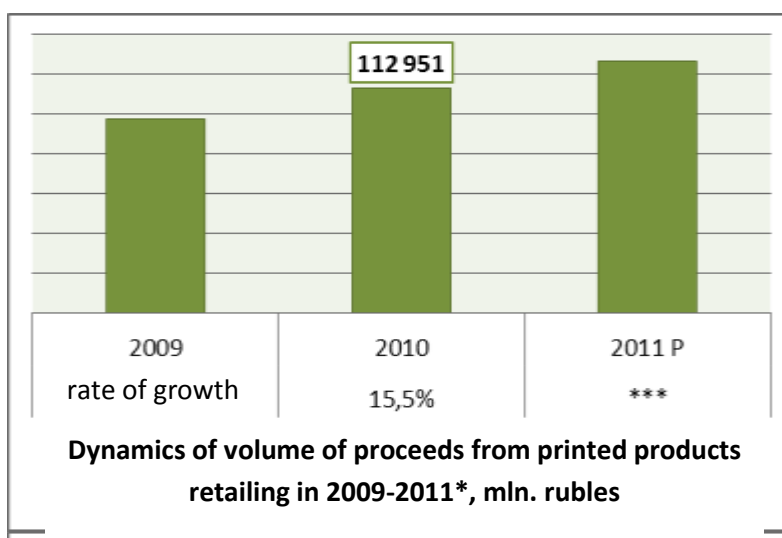
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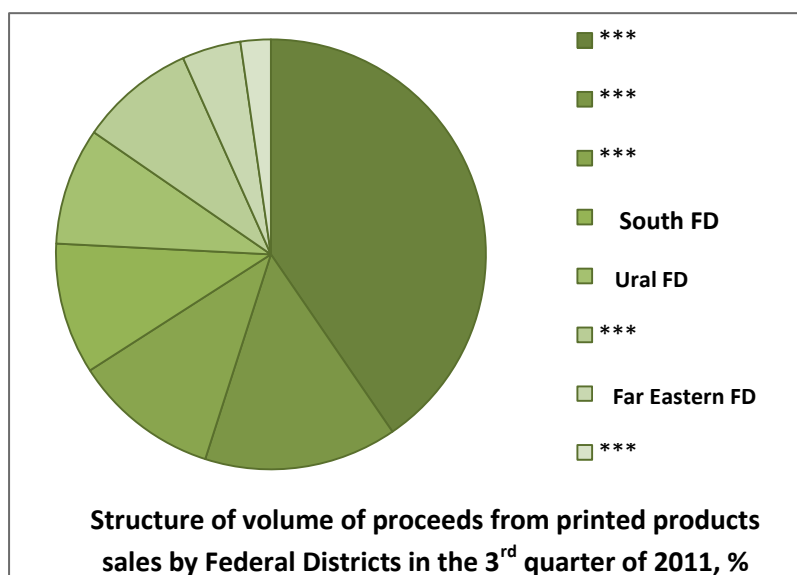
## VOLUME OF RUSSIAN MARKET

In 2011 volume of proceeds from printed products sales reached \*\*\* bln. rubles, that is by \*\*\*% more than the last year results. At that the market capacity makes up about \*\*\* bln. dollars.

In 2009 and 2010 in the dynamics of retail sales of printed products, the general tendency was noticed: sales in \*\*\* and \*\*\* quarters were almost the same, in \*\*\* quarter fast growth was noticed. In 2011 the peak of sales accounts for \*\*\* quarter, although the significance difference between sales of \*\*\* and \*\*\* quarters was not noticed.



In the structure of proceeds from printed goods dominated the \*\*\* Federal District, to which \*\*\* % of proceeds accrue in the 3<sup>rd</sup> quarter of 2011.

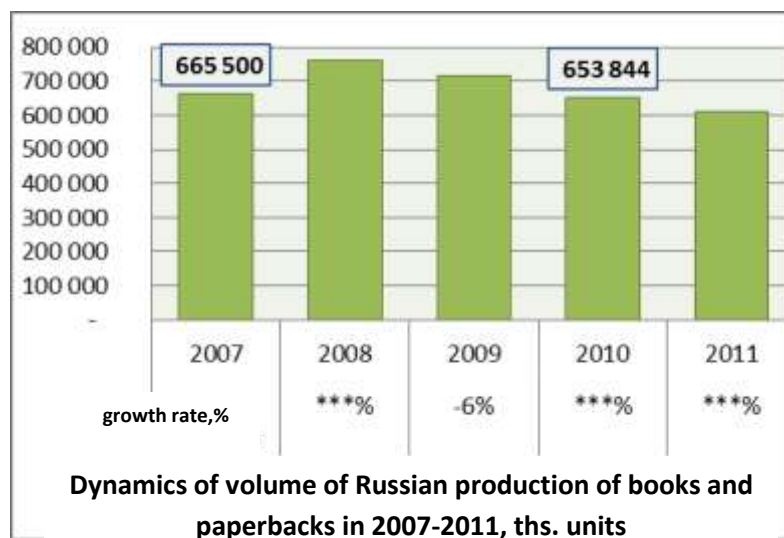


## CHAPTER 5

## BOOKS PRODUCTION IN RUSSIA

In 2011 books production enlarged the volume by \*\*\* ths. items, that is by \*\*\* % more, than in the previous year, but less the level of 2008-2009.

In 2011 to \*\*\* copies \*\*\* amount of copies per capita. This is by \*\*%, than in 2010 and by \*\*\*% less than in 2008, when the maximum was reached.



In 2011 the main volume of the products produced was accounted for \*\*\* Federal District - \*\*\*%. The share of \*\*\* District was \*\*%, Volga Federal District - \*\*%. In 2011 the share of \*\*\* Federal District

enlarged almost by \*\*\* p.p., while the share of Northwest Federal District, on the contrary, reduced by \*\*\* p.p. The share of Volga Federal District grew by \*\*\* p.p.





## CHAPTER 6

**THE LARGEST RUSSIAN  
PLAYERS ON THE BOOKS  
RETAILING MARKET**

In April 2012 by the total amount of retail shops \*\*\*--\*\*\* was in the lead, including \*\*\* of the chain shops “\*\*\*\*” and “\*\*\*\*”. It was followed by the chain of shops of “Eksmo” publisher, that included \*\*\* shops, among them \*\*\* wholesale and retail shops “Novy knizhny - Bukvoed”, \*\*\* “Novy knizhny” shops, \*\*\* “Bukvoed” shops, \*\*\* -- “Chitay-gorod” and \*\*\* unbranded shops. The third place is occupied by \*\*\* with \*\*\* shops.



Among regional chains by the amount of shops the first place was occupied by the chain “\*\*\*\*” - \*\*\* shops, the second – by “\*\*\*\*” - \*\*\* shops and “\*\*\*\*” - \*\*\* shops.

Among the largest wholesale companies Moscow ones dominate. In April 2012 the largest range of products was offered by companies “\*\*\*\*” and “\*\*\*\*” - \*\*\* and \*\*\* ths. items

correspondingly.

## CHAPTER 7

## CHANNELS OF SALES

In 2011 the main sales channel for major publishers was \*\*\*, \*\*\*, of the total volume of sales fell at it. It was followed by \*\*\* with the share of \*\*\*% and \*\*\* - \*\*\*%. Publishers' own shops (online and offline) provided \*\*\*% of sales, \*\*\* % were accounted for non-core points of sales.

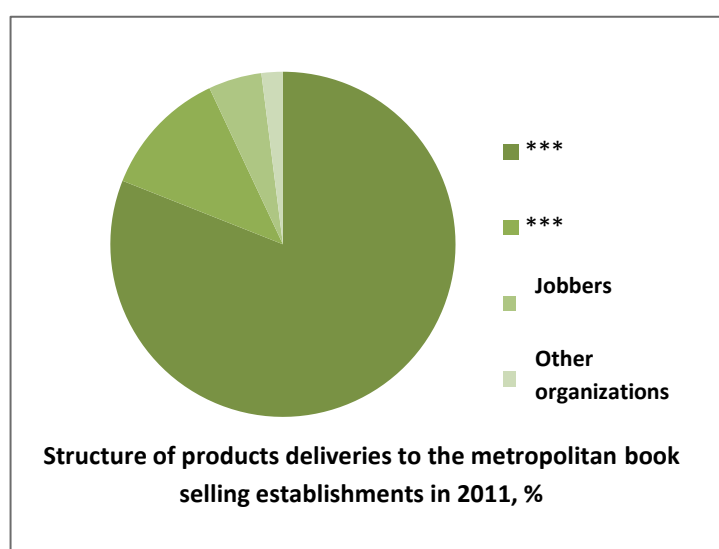
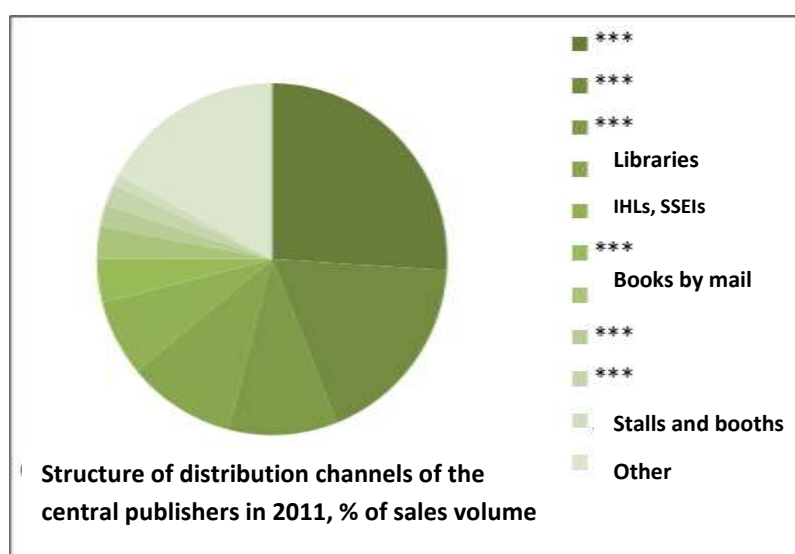
Structure of channels of distribution of regional publishers differed from the structure of central ones. The main consumer for them is \*\*\*, at which fell \*\*\*% from the total volume of sales.

Book selling establishments, both metropolitan and regional ones, mostly cooperate

directly with \*\*\*, and only then with \*\*\*. In 2011 the publishers performed \*\*\*% of deliveries

to the metropolitan bookshops. \*\*\*

provided 12% of the range of bookshops of Moscow and Saint Petersburg.



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### LIST OF SCHEDULES, DIAGRAMS AND TABLES

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## **ABOUT INTESCO RESEARCH GROUP**

## ABOUT INTESCO RESEARCH GROUP COMPANY

**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.

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  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

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