



**Intesco  
Research  
Group**

# RUSSIAN PUBLIC CATERING MARKET. FORECAST FOR 2013-2016



MOSCOW 2013

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## 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 2013-2016

**Regions of research:**

Russia, regions of RF, the 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  
SHARE OF THE LARGEST PUBLIC CATERING NETWORKS (TOP-15) IN MOSCOW AND ST. PETERSBURG  
TRENDS IN THE RUSSIAN PUBLIC CATERING MARKET  
RUSSIAN FAST FOOD MARKET  
RUSSIAN PRIVATE CATERING MARKET  
FORECAST OF THE RUSSIAN PUBLIC CATERING MARKET DEVELOPMENT FOR 2013-2016

**Field players analyzed:**

The top 15 Russian public catering networks  
The largest Russian restaurant operators

**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

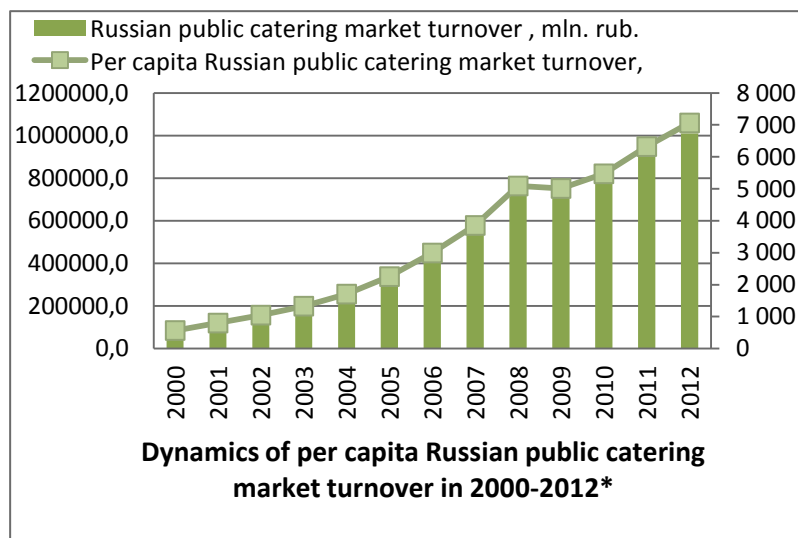
**The research contains 39 schedules, 20 diagrams, 20 tables.**

## EXTRACTS FROM RESEARCH

## CHAPTER 3

VOLUME OF THE RUSSIAN  
PUBLIC CATERING MARKET

In 2010 the Russian public catering market began to grow again after the slight decline in the volumes(-1.6%) during the crisis in service industries in 2009. According to Intesco Research Group analysts, in 2012 the market turnover exceeded trillion threshold and it amounted to \*\*\*\*\* bln. rub. Not only the growth



of public catering chains and fixed-site items, but the active development of new retail formats are contributing to it: take-out, delivery, small catering. More and more Russians become permanent “consumers” in the public catering industry.

Aggregate turnover of the public catering per capita amounted to 7 \*\*\* rub/peop. in 2012, and in 2009 it was almost by 2 ths. rub./peop. less.

In Russia in 2010 eating out does not exceed 3,1%, while the Russian people spend 29,5% of their income on food. That is interesting that in Spain and Ireland in 2011 people spend more on public catering than on buying food. These European countries were leading in the share of expenses on eating out (14,8% and 12% respectively). Citizens of Greece spend one tenth of their income in catering facilities (10%), in Portugal (9,2%) and in Austria (9%).

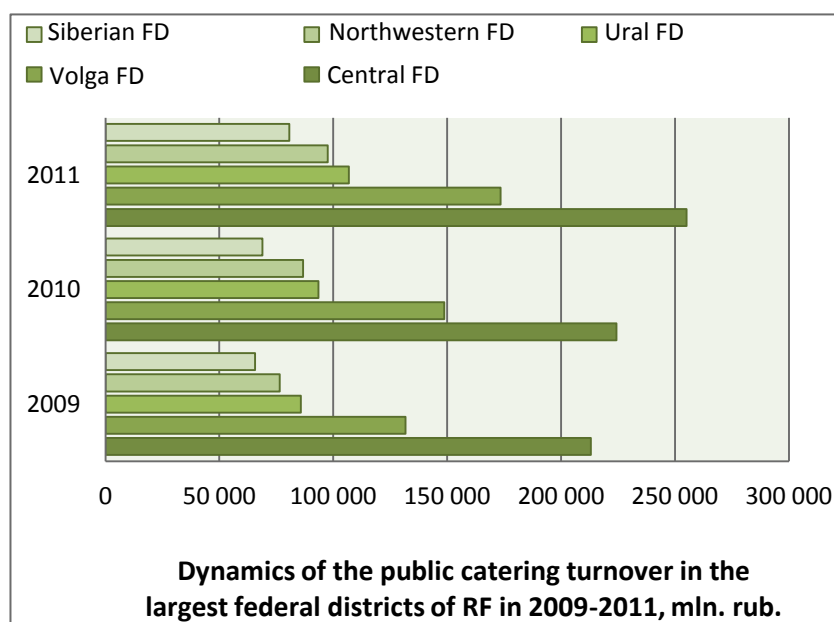


### *The public catering turnover in federal districts*

The largest federal district by the public catering turnover is the Central FD. In 2011 the volume of the services of this branch amounted to\*\*\*,1bln. rub., Moscow accounted for 53% out of them. The Volga FD ranked second (173,5 bln. rub.), the Ural FD – third (106,9 bln. rub.)

The maximum growth was recorded in the Volga FD (+32% in comparison with 2010), that indicates fast growth rates of the market in the regions of the district. The numbers in the Central district grew by one fifth, the Ural and Northwestern FDs – by one fourth. In the Siberian district a growth by 5% was recorded in relation to 2011, that is the smallest among all the districts.

In 2011 the Central FD accounted for\*\*,2% of the total public catering turnover in Russia. 1\*,2% belonged to the market in the Volga FD. The shares of the Ural and the Northwestern districts amounted to\*\*,8% and\*\*,8%. respectively. The public catering turnover in the Siberian and the Southern districts was almost 9% each.



The share of the leading Central district decreased in relation to 2010 – (-0,5 percentage points). Nevertheless, the share of the North Caucasian district increased considerably – by 0,8 percentage points.

### *Volume of public catering market in Moscow*

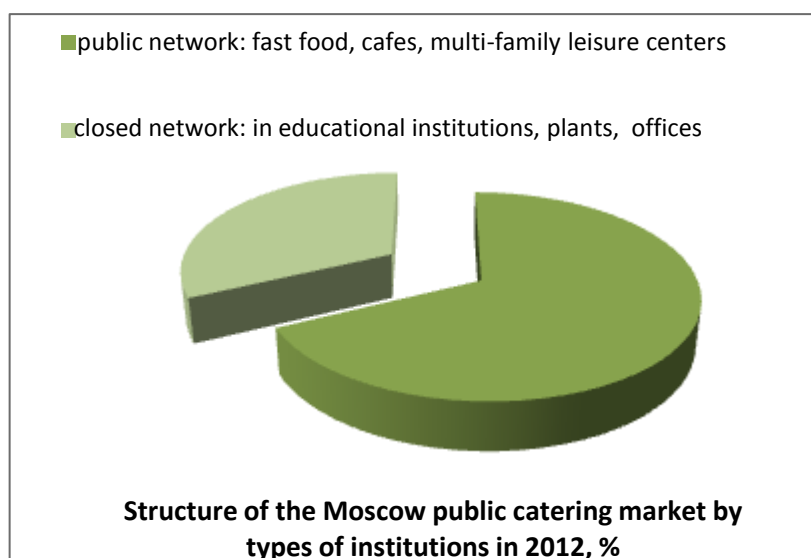
In 2011 the share of Moscow amounted to 15,1% in the all-Russian market volume of public catering.

If we consider the share of Moscow in the total volume of the Russian public catering market in its dynamics, we can observe a trend towards decreasing. From 2006 till 2011 it declined by 4,2% (from 19,3% to 15,1%). The crisis 2009 was out of the dynamics, when the market of public catering in Moscow was more stable than the regional markets, that's why it kept on increasing slowly.

Catering business is the fastest growing market of the public catering markets. From 2007 till 2011 it increased by 15,3 bln. rub. or 41%. At the same time canteens bring less and less profit, small businesses close, in this struggle canteens often have to raise the level of service and quality of food to the level of cafes, bars. 2010 accounted for the golden time of canteens, when the amount of work completed reached 8,2 bln. rub. However, in 2011 there was a decrease by 27,9% in relation to the previous year.

It is worth noting that among large and medium catering facilities there is a high proportion of loss-making enterprises. In the first half of 2011 it amounted to 36,6%, in the same period of 2010 – to 32%.

Cafes, canteens and restaurants account for a large part of public catering turnover in Moscow. Their share amounts to about 7%. The rest 2,2% are occupied by canteens (in schools, kindergartens, institutions) and feeding stations in office centers.



## CHAPTER 8

**RUSSIAN PRIVATE CATERING  
MARKET**

In 2012 the volume of the Russian private catering market amounted to **22.2 billion rub.**, that was by 29% more than a year earlier. Share of private catering in the public catering market made up **2.2%**, and it exceeded the crisis 2007. In general, **2.2%** 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.



In Moscow Sodexo, “MEGA Foods”, “LanCh” (Moscow subdivision “Corpus Group”), “Cantina City” are the leading market players. “OMS” has nine major business centers in Moscow and, according to some experts, Compass has been active, working in Russia under the brand “Eurest”. In regions the leading companies are “Corpus Group”, “OMS”, Sodexo, “MEGA Foods”.

Delivery market is also developing together catering. In 2012, the Ginza project company released a mobile application for iPhone and iPad for the delivery of food from its restaurants. Delivery Club is another large player in the market, invested by AddVenture fund. According to the very company, now more than 30% of online orders food from restaurants in Moscow and St. Petersburg pass through Delivery Club.

## LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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## **INFORMATION ABOUT INTESCO RESEARCH GROUP**

## INFORMATION 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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