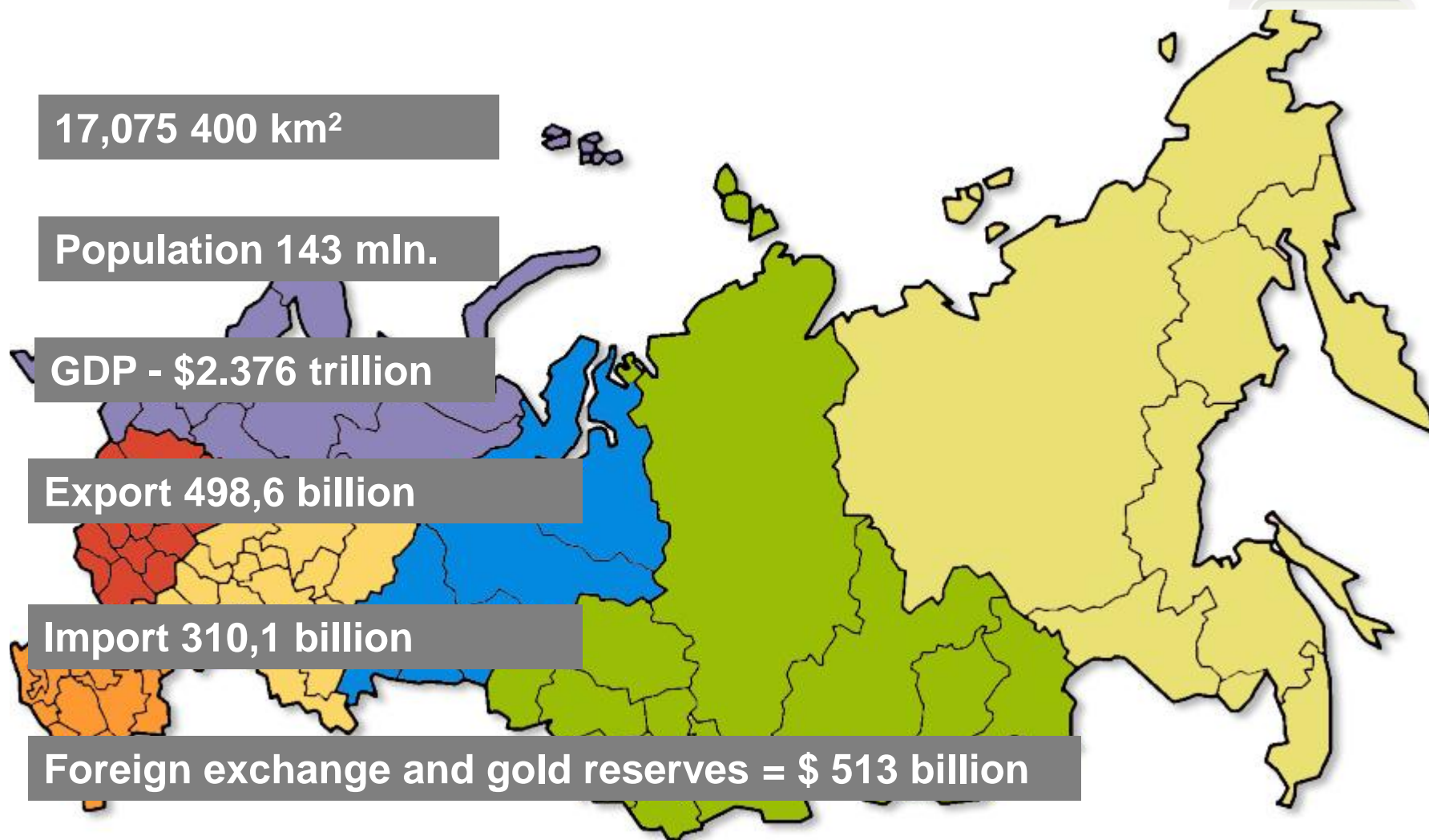


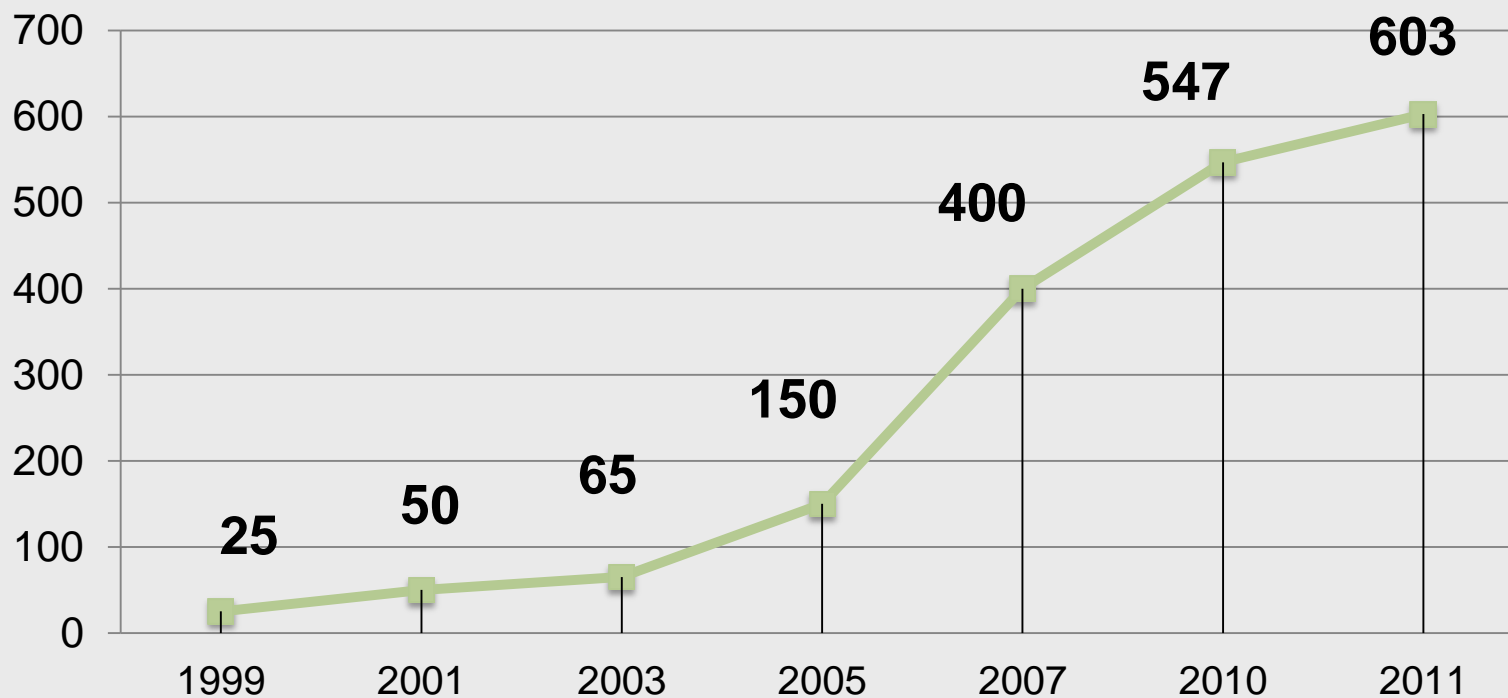
# RUSSIA

International  
Franchise and Other  
Business Opportunity Exhibition



# KEY FIGURES

International  
Franchise and Other  
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Corporate units **12 998**

Total **35 012**

Franchised units **22 014**

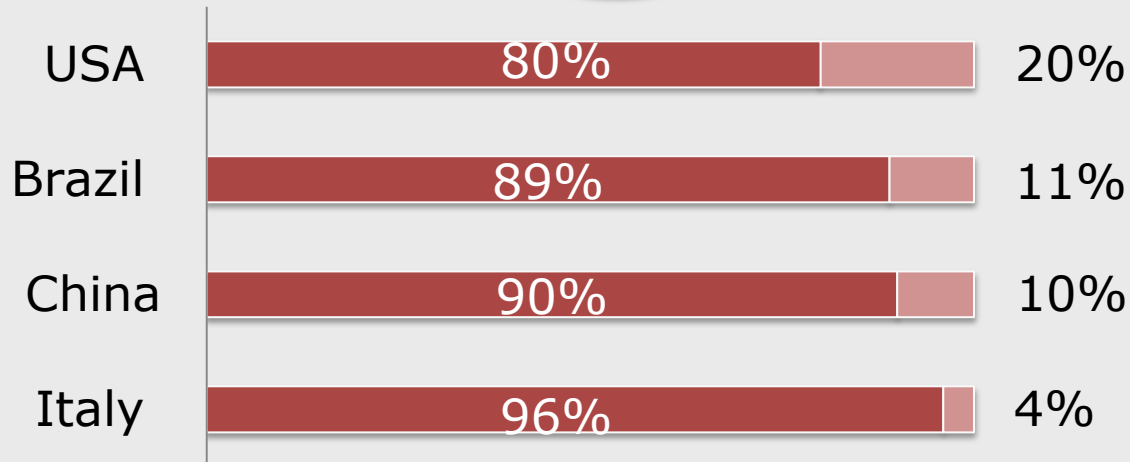
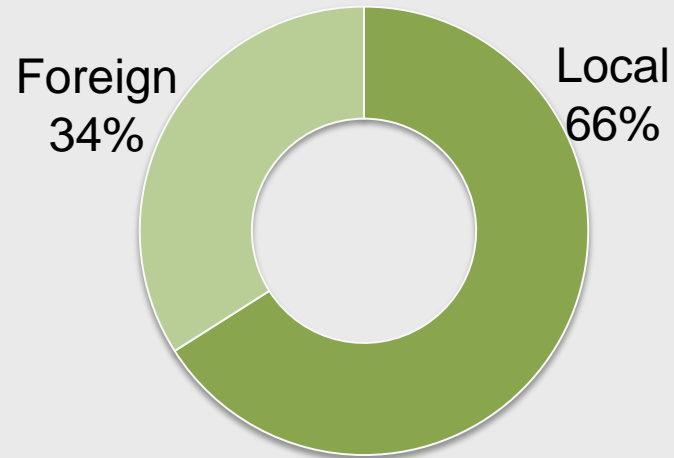
TOTAL EMPLOYED STAFF **283 443**

# LOCAL VERSUS FOREIGN FRANCHISORS

International Franchise and Other Business Opportunity Exhibition



## Russia

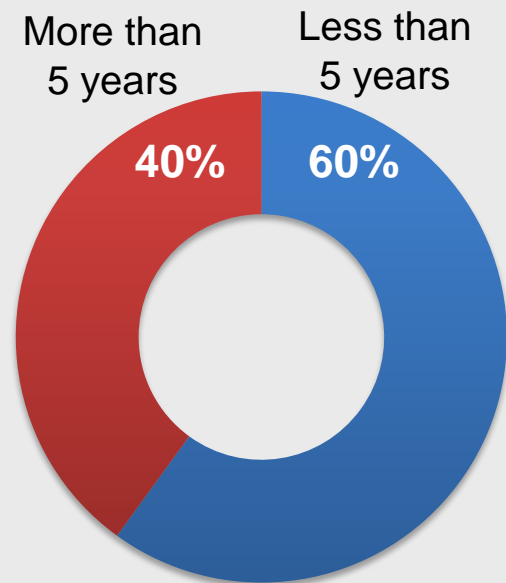


# RUSSIAN FRANCHISOR FACTS

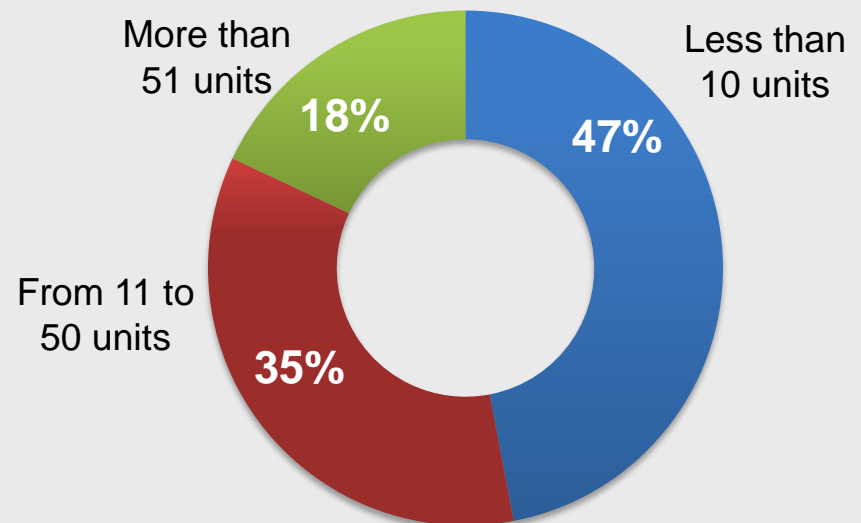
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## History of Russian franchisors

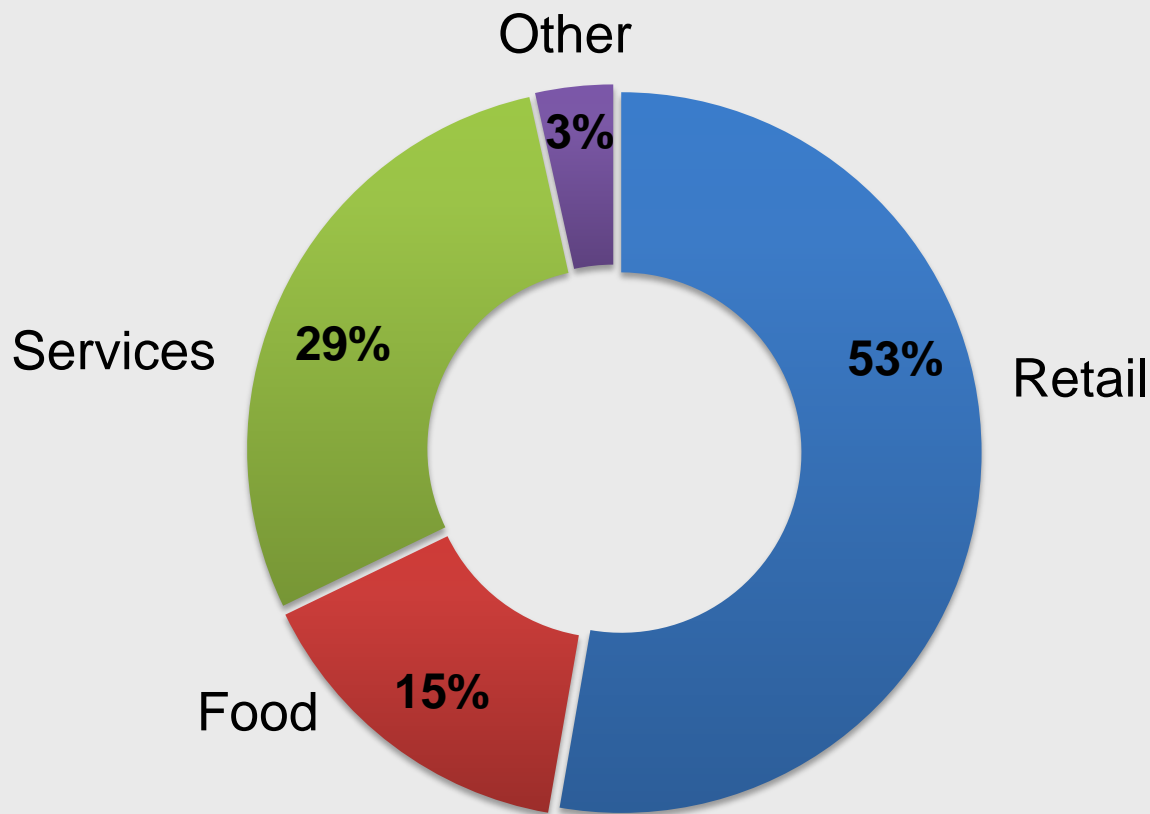


## Franchise chains by number of franchisee



# FRANCHISING BY SECTOR

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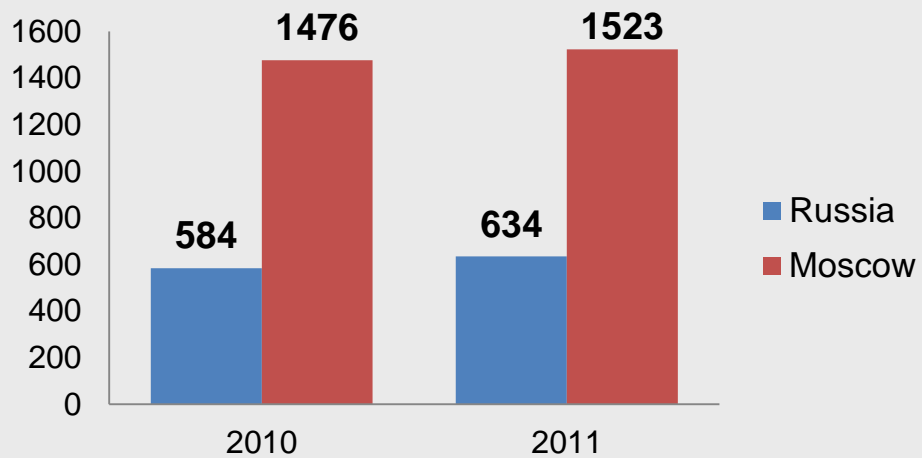
# RETAIL MARKET REVIEW

Factors affecting consumer demand

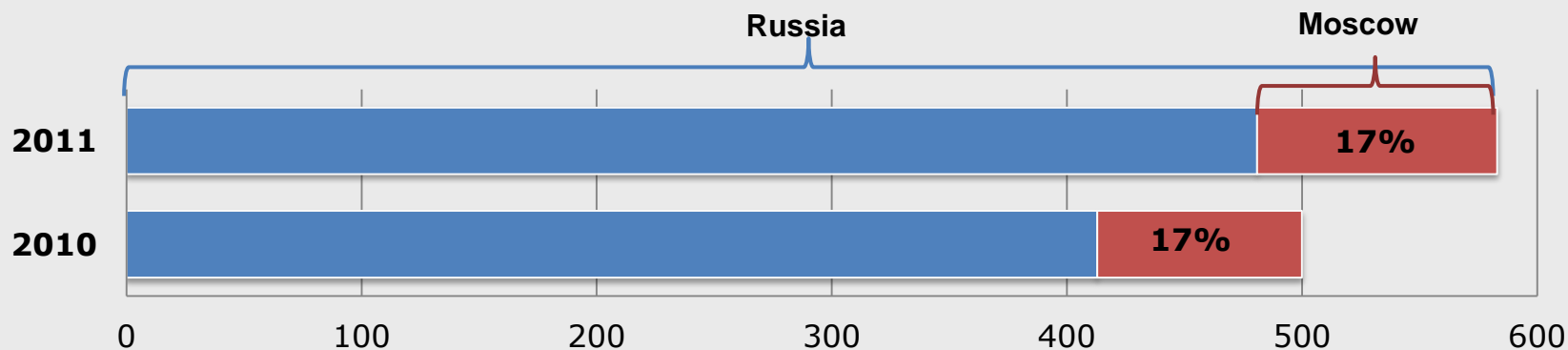
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Average monthly income, \$



Retail turnover, \$ bn



# RETAIL MARKET REVIEW

International  
Franchise and Other  
Business Opportunity Exhibition



## Shopping center rents by profile, 2011

| Profile                 | Area (sq.m.) | Moscow      | St.Petersburg |
|-------------------------|--------------|-------------|---------------|
| Hypermarket             | 5000         | \$120-300   | \$80-120      |
| Entertainment           | 4500-10000   | \$120-250   | \$90-170      |
| Perfume&Cosmetics       | 300-500      | \$1300-2400 | \$600-1900    |
| Goods for children      | 300-800      | \$350-1500  | \$250-800     |
| Fast food & restaurants | 40-600       | \$500-2500  | \$900-1300    |
| Fashion & apparel       | 200-1000     | \$500-1000  | \$240-650     |

## SOME TRENDS IN THE RETAIL SECTOR

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- Franchisors have started expanding into smaller towns and cities with a population of 200,000 - 500,000
- The Fashion retail segment is still growing. The number of chain-stores may increase by up to 20-25%
- New Franchisors: "Fashion Galaxy" and pharmacy chain A.V.E. planning to open 100 retail stores in Moscow and Moscow region by the end of this year

### Main entries in 2011:

VICTORIA'S SECRET



DOROTHY PERKINS

AMERICAN EAGLE  
OUTFITTERS

Dezigual®

DKNY  
DONNA KARAN NEW YORK



# RESTAURANT AND FAST FOOD SECTOR TRENDS

International  
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Business Opportunity Exhibition



- Euromonitor evaluated the Russian fast-food segment at \$6,66 bln and predicted 200% growth by 2014.
- Moscow, a city of 18 million, so far has only about 300 pizza restaurants — compared with 4,000 in Manhattan, which has a population of about 1.6 million
- Despite the difference between US ( 43 539\$ ) and Russian (7 608\$) household incomes, the average bill for fast food in Russia is 37% higher.

## Main entries in 2011:

