

A Market Research Perspective

Vienna Economic Forum

9. November 2010

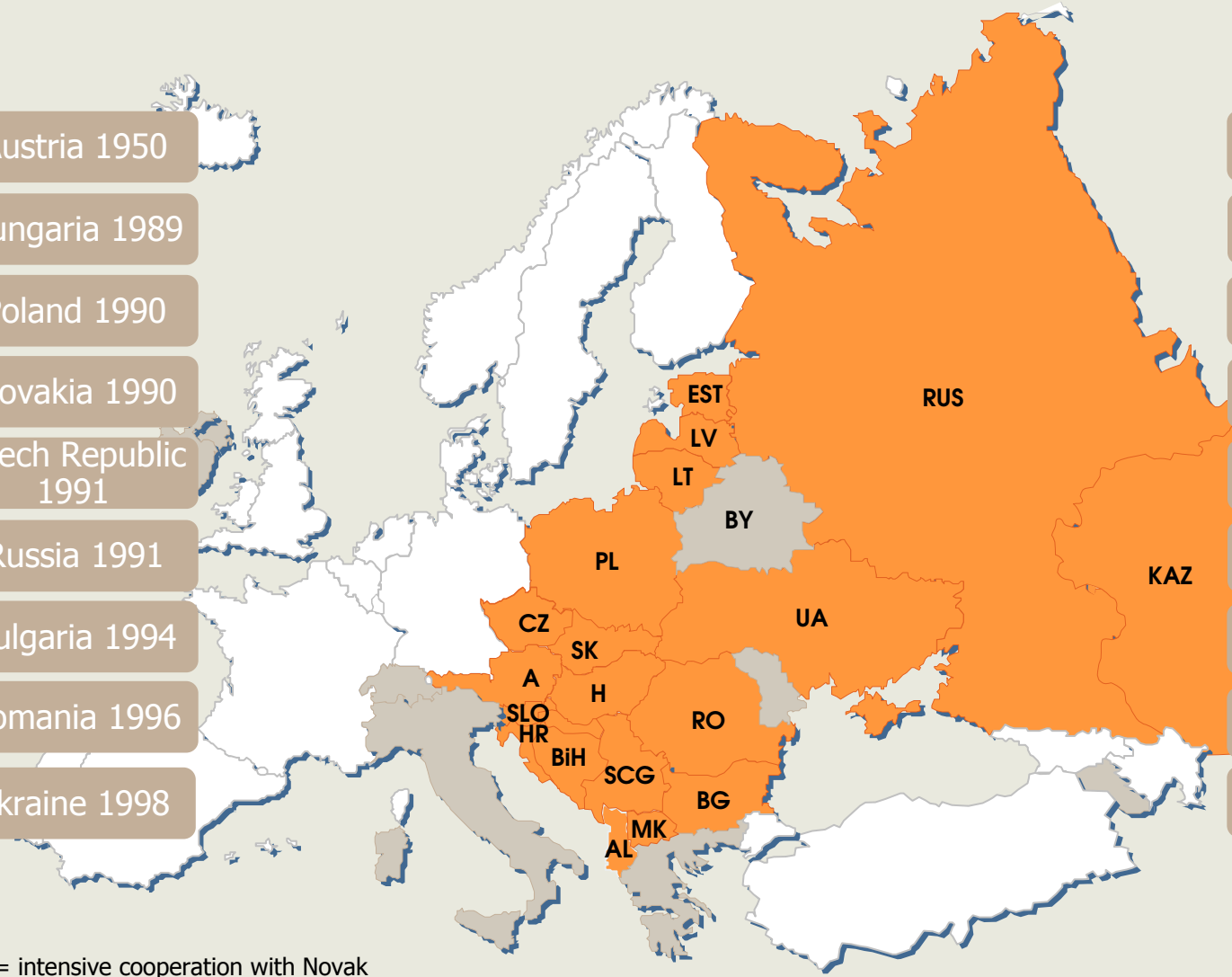
Prof. Dr. Rudolf Bretschneider

Zentral- und Osteuropa Repräsentanzen

- Austria 1950
- Hungaria 1989
- Poland 1990
- Slovakia 1990
- Czech Republic 1991
- Russia 1991
- Bulgaria 1994
- Romania 1996
- Ukraine 1998

- Croatia 1999
- Slovenia 2001
- Serbia 2002
- Bosnia 2004
- Kazakhstan 2005
- Baltics 2006
- Macedonia 2007
- Albania 2008
- Egypt 2008

BY = intensive cooperation with Novak

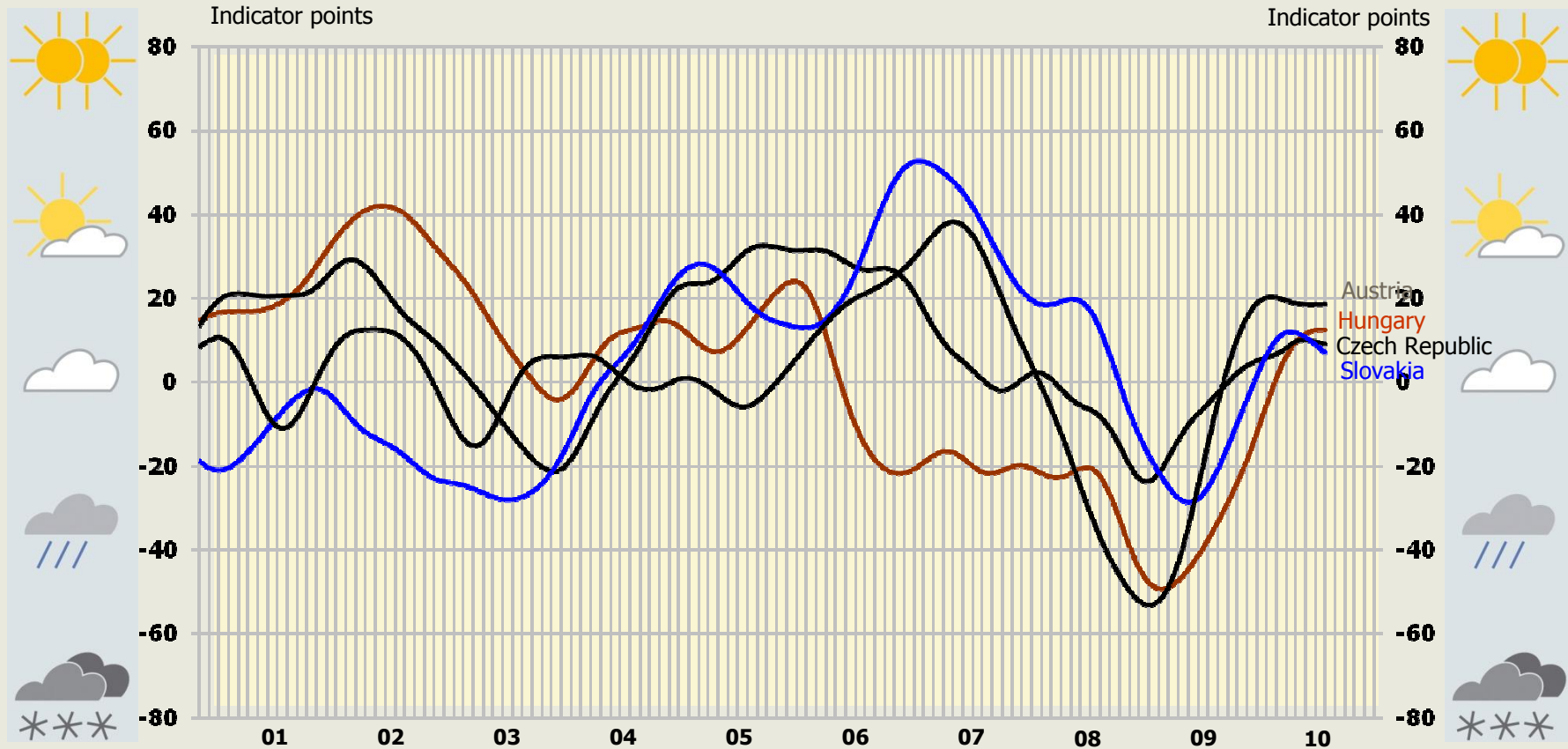


GfK EURO-Climate

Austria, Poland, Hungary, Romania,
Bulgaria, Czech Republic, Slovakia
August 2010



GfK-Indicator EURO-Climate Business Cycle Expectations 1

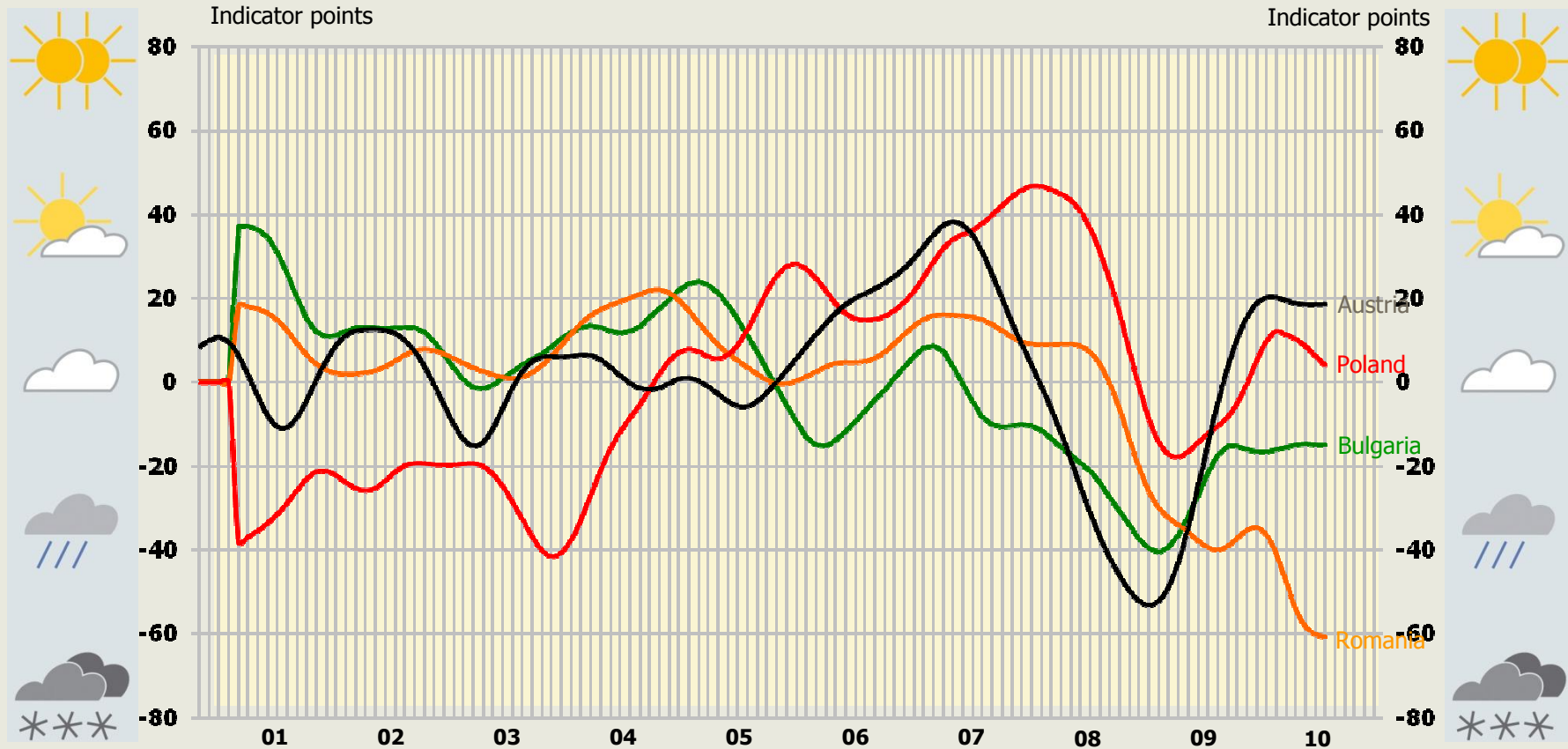


8/10
Source: Consumer survey of EU Commission, GfK Marktforschung





GfK-Indicator EURO-Climate Business Cycle Expectations 2

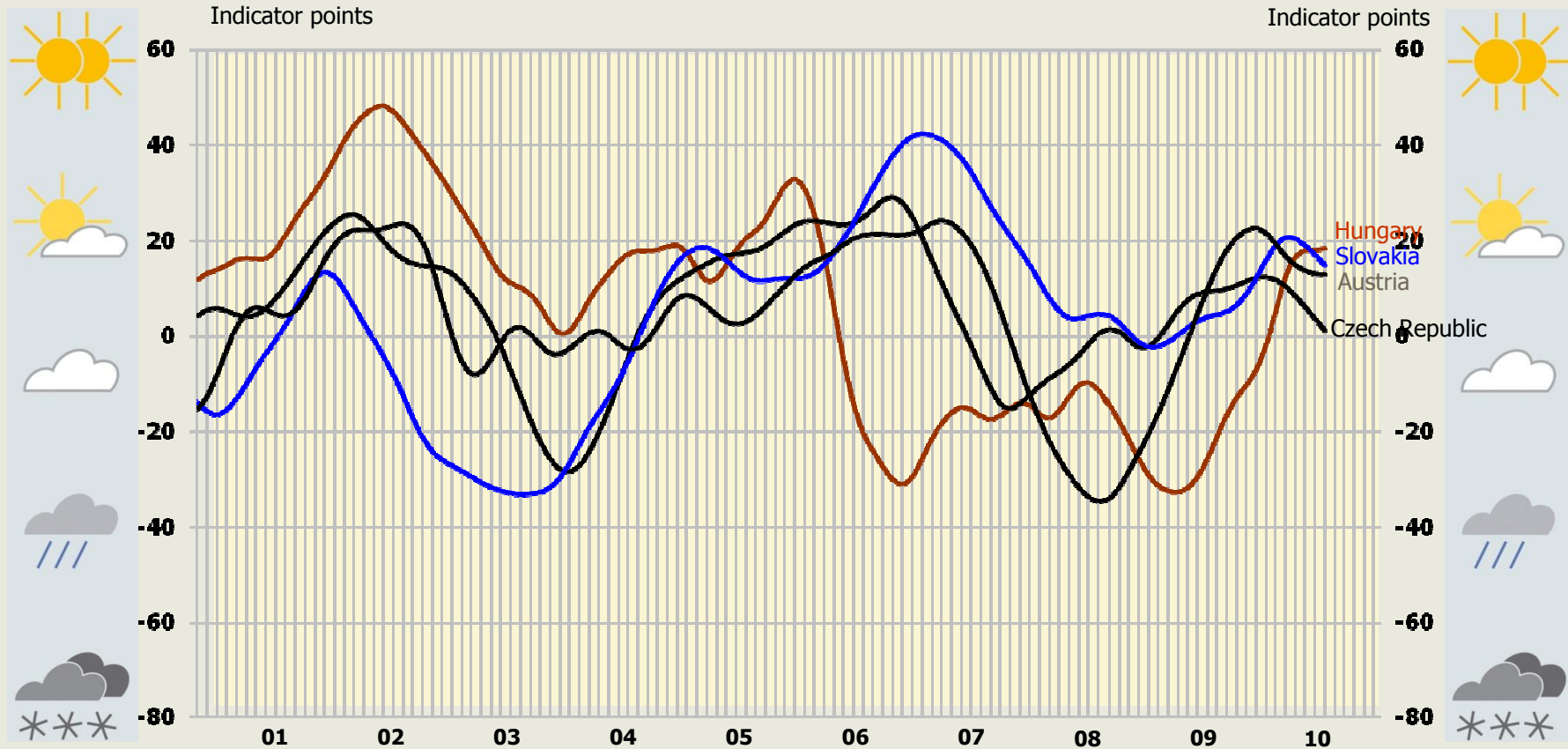


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Source: Consumer survey of EU Commission, GfK Marktforschung





GfK-Indicator EURO-Climate Income Expectations 1

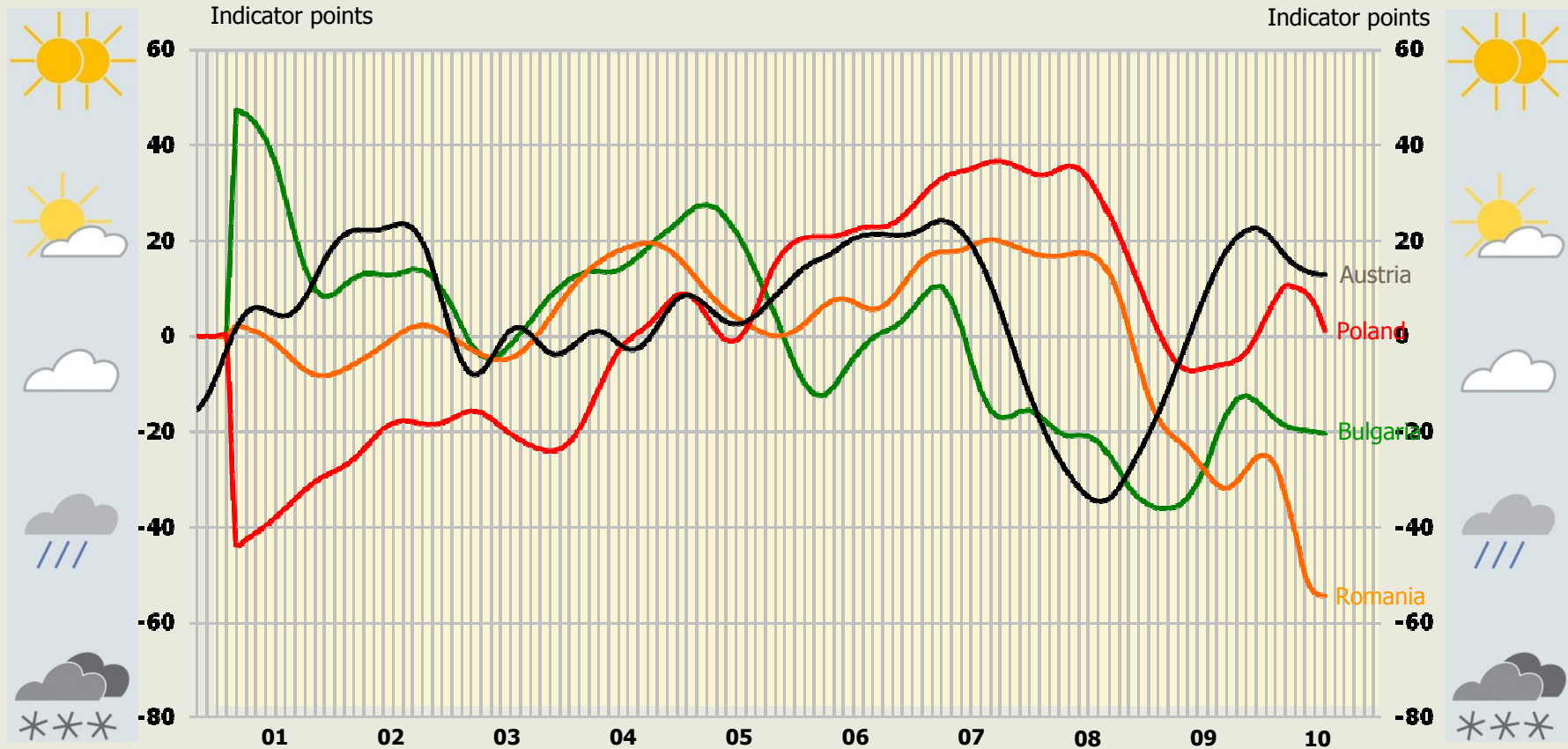


8/10
Source: Consumer survey of EU Commission, GfK Marktforschung





GfK-Indicator EURO-Climate Income Expectations 2

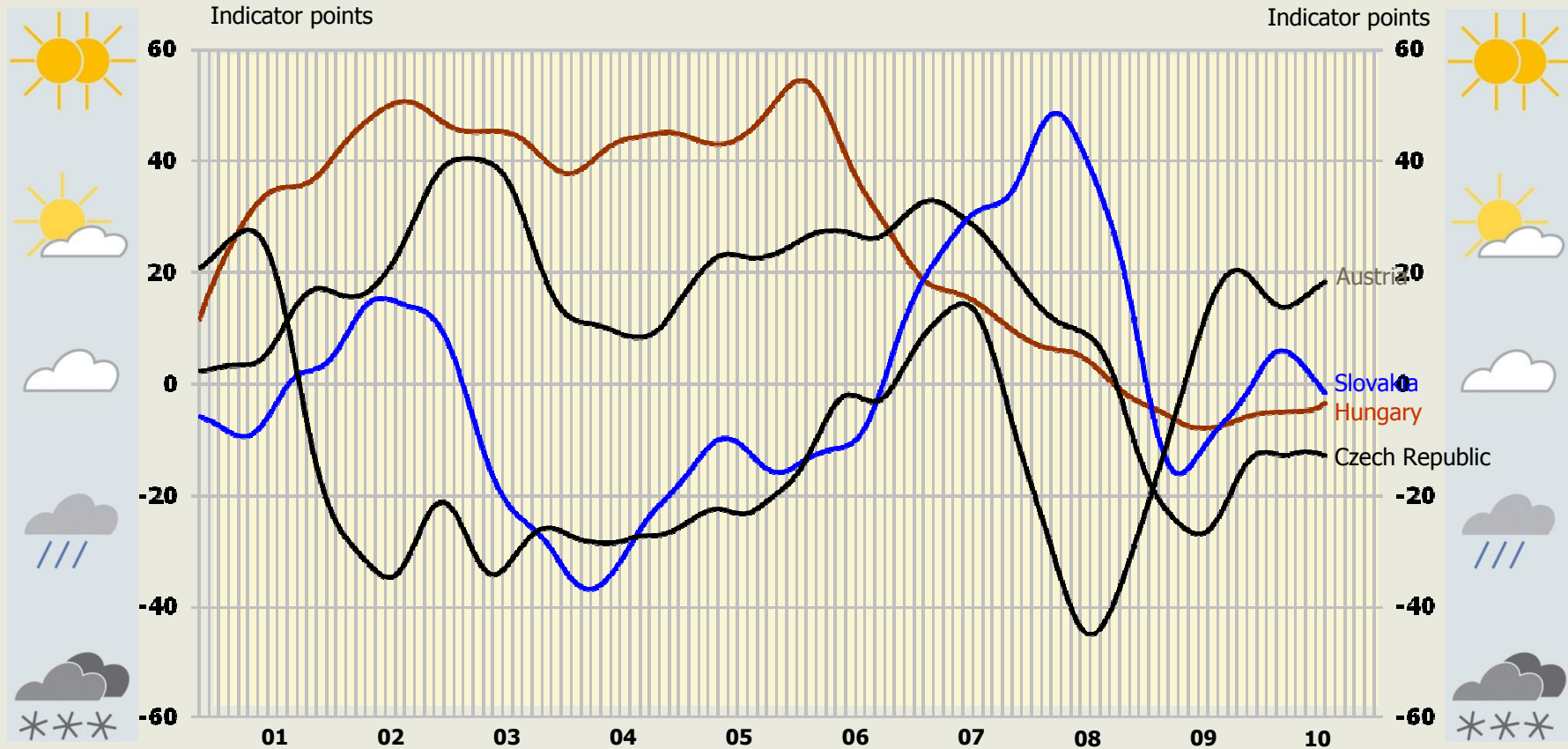


8/10
Source: Consumer survey of EU Commission, GfK Marktforschung





GfK-Indicator EURO-Climate Willingness-to-Buy 1

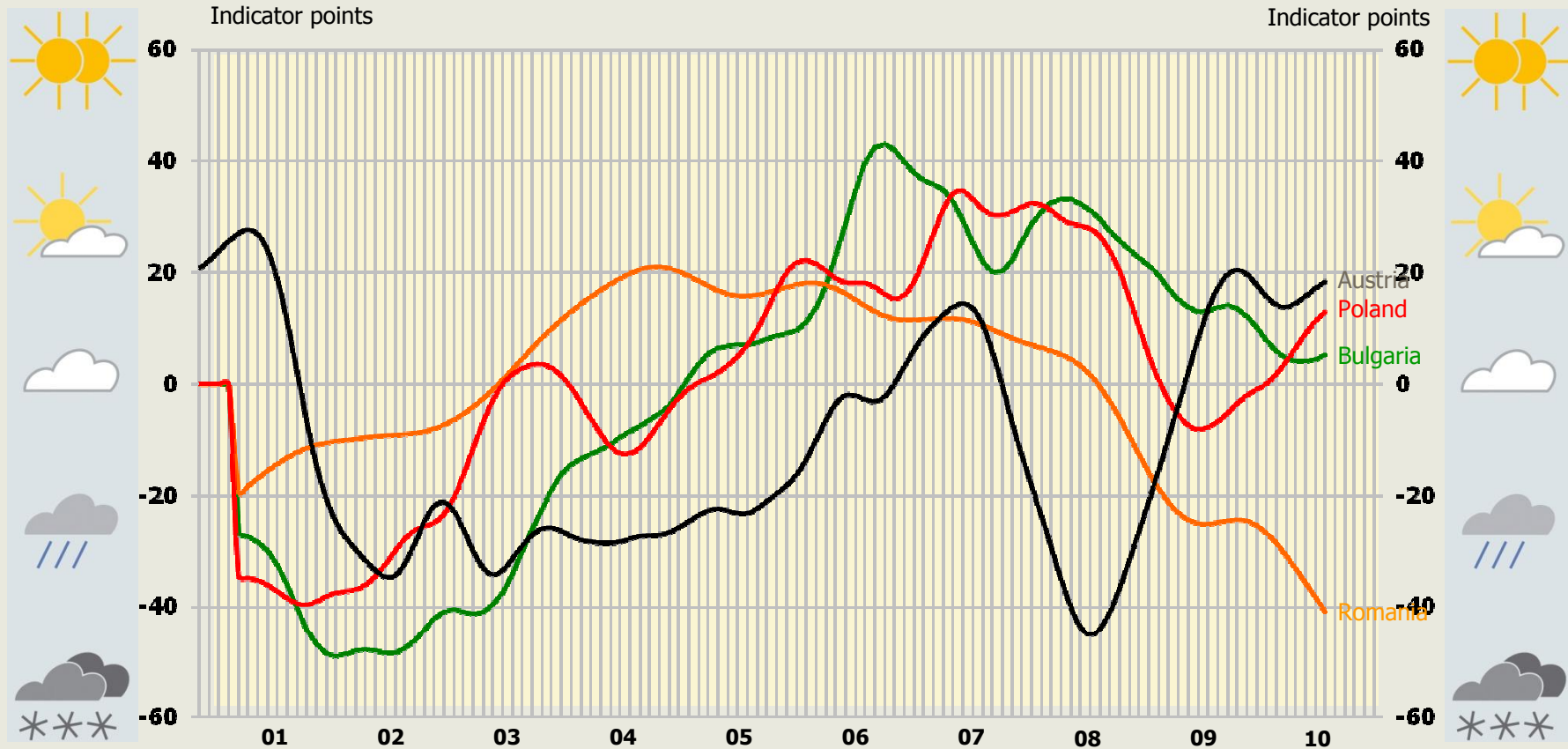


8/10
Source: Consumer survey of EU Commission, GfK Marktforschung





GfK-Indicator EURO-Climate Willingness-to-Buy 2



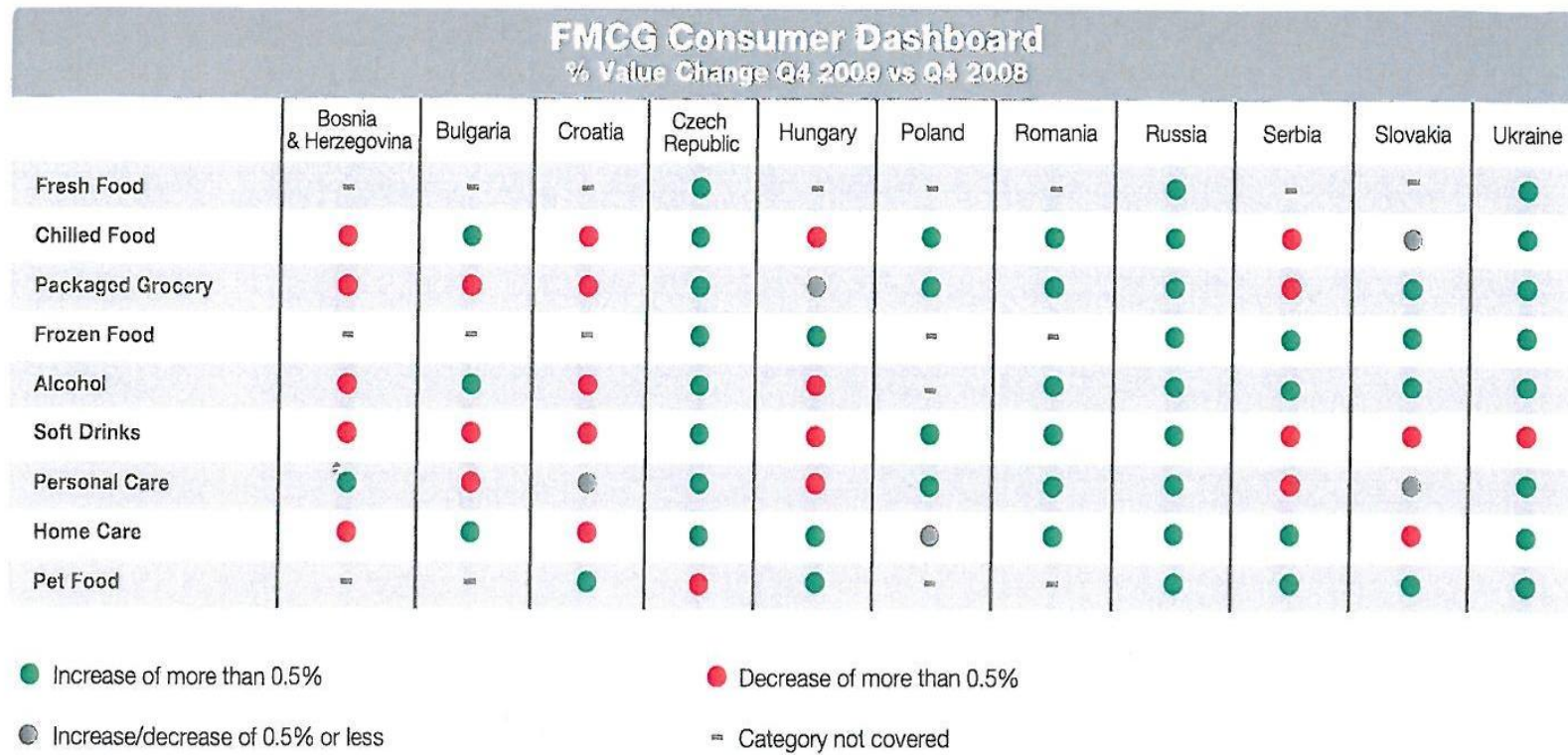
8/10
Source: Consumer survey of EU Commission, GfK Marktforschung



CONSUMER INDEX

Overview of Trends

10



Market trends 2010

Main Macro-Economic Indexes RUSSIA

11

	2009 vs.2008	1st half year 2010 vs 1st half year 2009	2010 forecast
Industry production index	-10.8%	12.5%	10.8%
Retail turnover	-5.5%	3.5%	5.1%
Income per capita, real	2.5 %	5.3%	2.7%
Unemployment (avg. for period)	8.6% (2009)	8.1% (1st half year 2010)	7.4%
GDP	-7.9%	+4.2%	+4.5



Consumers' Attitudes

Consumer Sentiment Index

12

July 2010

Consumer Sentiment index	108
Current situation index	100
Consumer expectation index	113

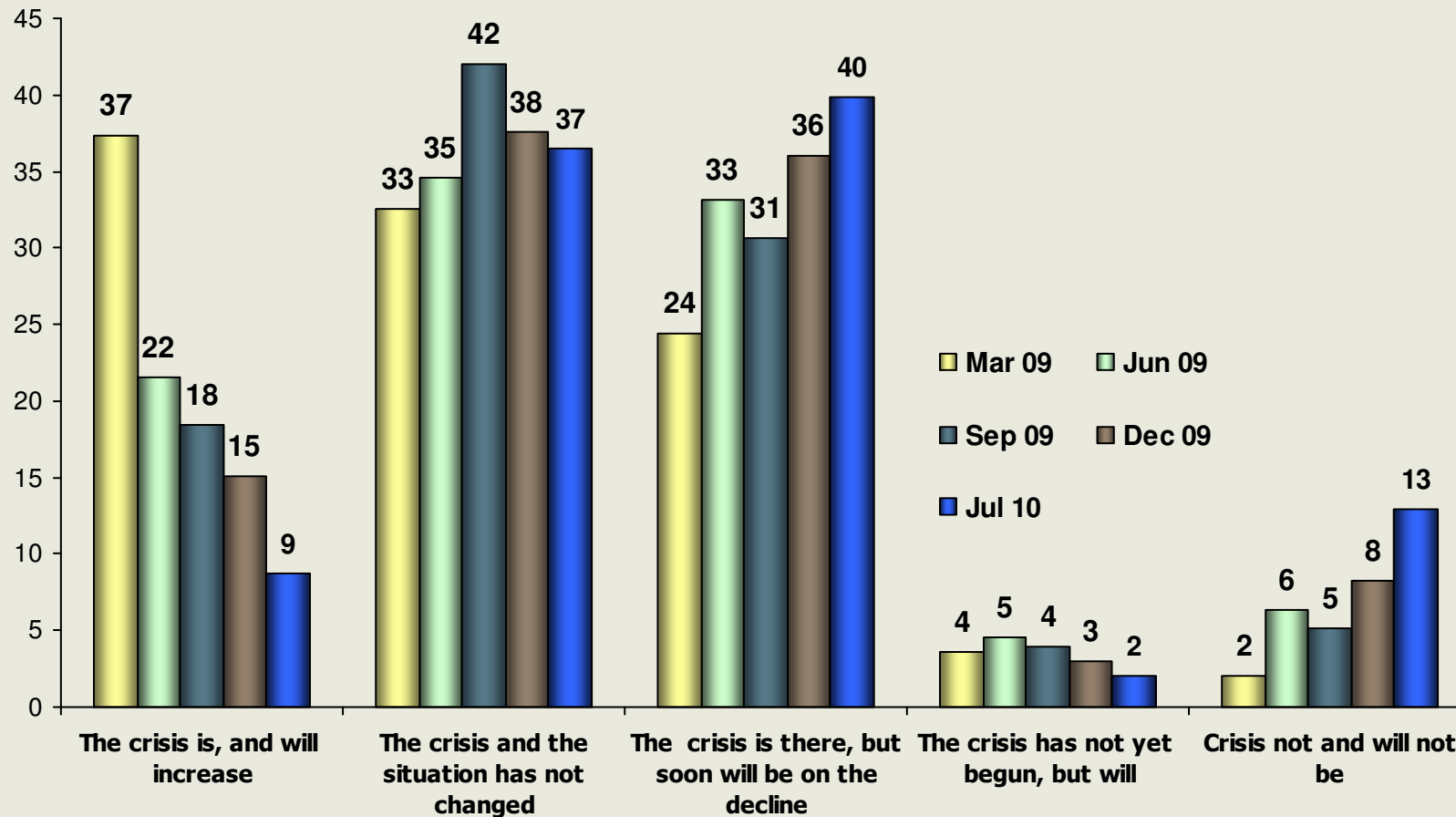
Index dynamics

	2001	2005	2007	May 08	Dec 08	Mar 09	Jun 09	Sep 09	Dec 09	Jul 10
Russia	92	109	116	116	85	68	81	86	91	108
Urban	93	110	117	115	81	68	82	86	91	105
Rural	90	107	112	116	96	67	77	87	92	114
Moscow	99	118	130	113	101	79	96	93	91	111

Crisis Attitudes

What Do you Think about Crisis in Russia?

13



Consumers' Behavior on Certain Markets

Growing Expenditures, Value change %

14

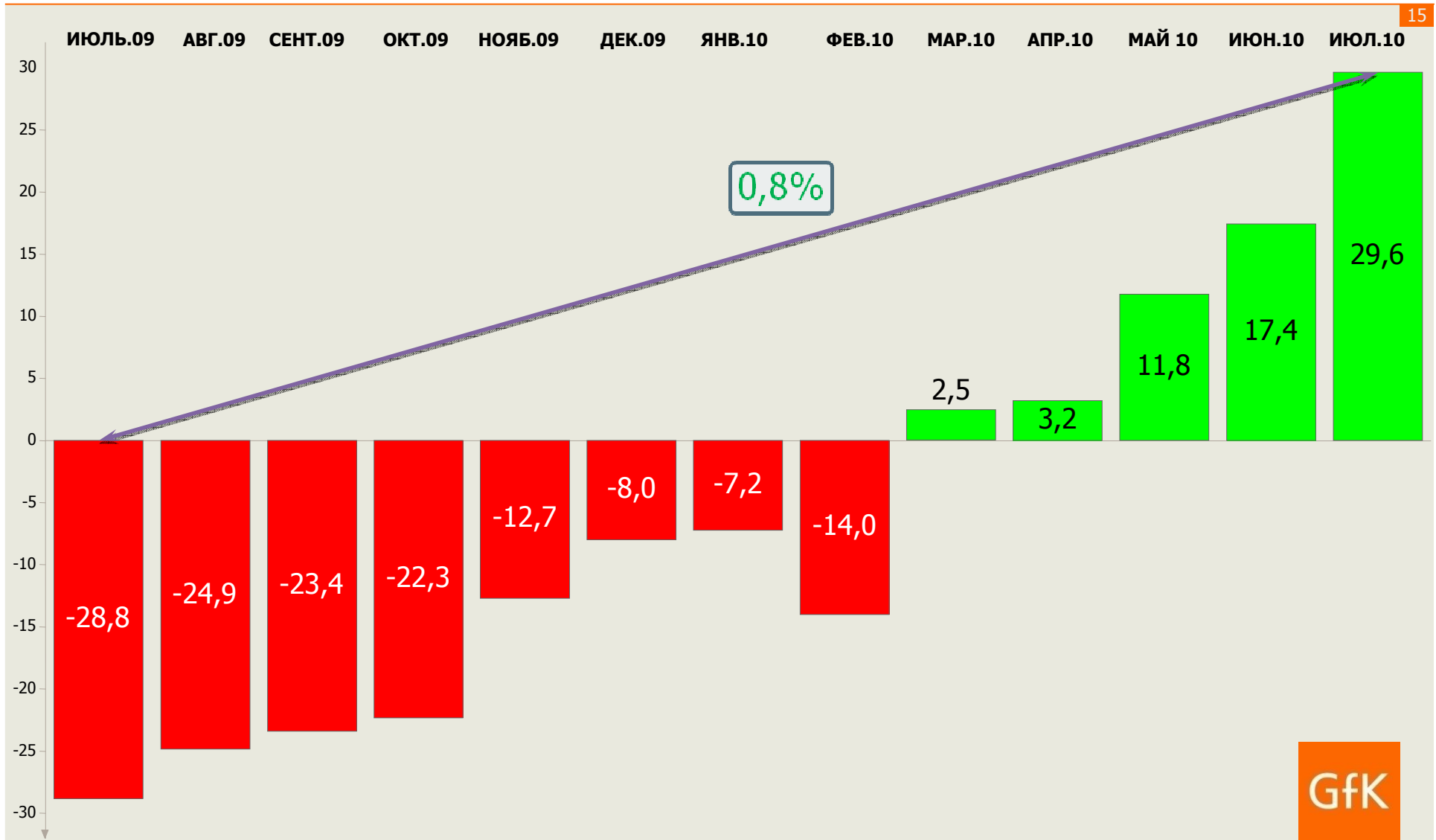
	Jan-Jul 2010 vs. Jan-Jul 2009
Food	+12.8%
Personal care	+ 2.9%
Home care	+ 7.7%
FMCG total	+ 12.8%



Dynamics of Consumer Electronics Market, % v.s. to the same period of the last year

Россия, города 100 тыс. +

ИЮЛЬ 09 – ИЮЛЬ 10



Prospects 2010, Russia

Dynamics of Car Market, %

16

2009/2008	Jan 10/ Jan. 09	Feb 10/ Feb 09	March 10/ March 09	Jan.-August 2010/Jan.august 2009
-49	-37	-34	-7	14%



Source: AEB



GfK