



Clothing and footwear retail market in Russia 2008

Luxury market insights and development forecasts for 2008-2010

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A word from PMR's Head Retail Analyst:



"The Russian clothing, footwear and accessories market (CFA) is undergoing dramatic changes. While Russian operators are growing strong and further foreign brands are entering the country, competition is rising and people are becoming more and more demanding. As a result of the gradual increase in consumers' incomes, the movement from cheaper to more expensive merchandise can be observed. The importance of open-air markets, which have traditionally been the place for Russians to shop for CFA merchandise, is declining. Consumers are tending towards regular shops.

At present, the majority of the trade is concentrated in the Moscow and St. Petersburg areas. Nevertheless, as retailers gain experience, their chains are spreading to the regions.

One of the interesting features of the Russian CFA market is that the luxury segment is already developed and huge. It is one of the most promising luxury CFA markets in the world. The majority of the global luxury brands have already established a strong presence in Russia and have reached the point where they are establishing their own distribution chains, withdrawing their contracts with their initial distributors in Russia".

Malgorzata Machnicka, Head Retail Analyst

PMR MarketInsight Methodology

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PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.

PMR
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Methodology

In 2007 the Russian clothing, footwear and accessories market was worth €40.7bn.

Report description

Clothing and footwear retail market in Russia 2008 is the latest report from PMR, profiling the lead holdings in the Russian clothing and footwear market. With the consumer spending in Russia looking up, high end fashion retail is receiving increased attention.

Covering a wide selection of data, from segment specific breakdowns to distribution channels, a special analysis of the luxury market as well as profiles of leading brands, houses and operators are also included. Forecasts of sales and market developments up to 2010 provide a glimpse of what the future holds for this market.

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Key sections

Executive summary

Economic and demographic situation

General overview of retail market in Russia

- Retail turnover
- Breakdown of spending

Description of clothing, footwear and accessories (CFA) retail market situation

- Market size and overview
- Current trends
- Consumer behaviour
- Leading players

Accessories form the smallest segment of the Russian CFA market. Nevertheless, they are a very promising category, demonstrating 35% annual growth.

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The Russian CFA industry remains import oriented. Unfortunately, a significant share of imports are grey.

Description of particular distribution channels

- Clothing, footwear and accessories retail chains
- Mixed-assortment stores
- Independent stores and boutiques
- Open-air markets
- Others

Description of the selected clothing segments

- Formal menswear
- Undergarments and swimwear
- Sportswear
- Casual and leisurewear
- Children's wear

Description of Russian luxury clothing and footwear market

Profiles

- Key clothing and footwear retailers operating in Russia

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An essential read for:

- top managers, strategic planners and executives of companies considering entry or active in the Russian market
- companies engaged in manufacturing, distributing and importing clothing and footwear
- key decision makers and consultants involved in the fashion industry
- operators interested in the **luxury market** segment in Russia.

This report is an invaluable resource for any company considering merger and acquisitions in the Russian fashion industry.

Luxury brands are gradually leaving Tverskaya Street, Moscow's most prestigious location, for expensive shops.

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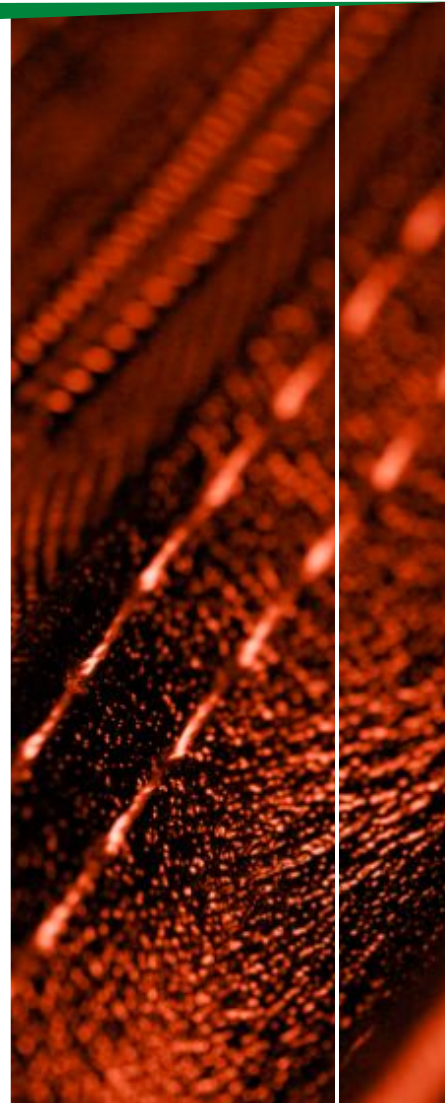
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