



# Retail opportunities in major cities in Central and Eastern Europe

## Market analysis and development forecasts for 2009-2011

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## A word from the author



“Central and Eastern Europe is a region of intensive economic growth, unparalleled to satiated economies of Western Europe. Modern retail formats have been developing in the region for only less than 20 years.

It would be a mistake to treat Central and Eastern Europe as a homogenous block of post-communist states. Due to a number of political, social and economic circumstances, retail sectors have taken a different shape in each country. Moreover, there are significant differences even between cities within one country. Based on a number of factors like wealth of population, economic growth and the level of market saturation, we have attributed the Country PMR Retail Attractiveness Index™ to eight countries and the City Retail Attractiveness Index™ to 175 cities in Central and Eastern Europe. This way we have identified the most attractive countries and cities for retail investment.”

**Marcin Szaleniec**, Retail Analyst

## PMR MarketInsight Methodology

This report was prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. It also contains special procedures to follow in the case of incomplete market.

PMR MarketInsight precisely defines report content and structure. **Industry reports prepared using PMR MarketInsight are based on information from a variety of available statistical, industry (specialist press, the internet), general and official sources as well as information from PMR's own database and primary research independently carried out by PMR.** The sources we use are individually tailored to each project.

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

PMR  
**MarketInsight**  
Methodology

The lowest inflation rates are found in Poland, Slovakia and the Czech Republic.

## Report description

**Retail opportunities in major cities in Central and Eastern Europe** examines the retail environment and evaluates the potential for success in the major cities of Central and Eastern European countries of Poland, the Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Russia and Ukraine.

This new report provides vital information on the developing retail industry in the region, and the grocery retail sector in particular, by ranking top locations in terms of their attractiveness for new retail outlets and establishments. It delivers key data as well as reliable retail prognoses for CEE countries, based on their population and earnings, retail sector and economic growth projections for the region, and current market saturation. The worldwide crisis situation is also taken into account.

**Retail opportunities in major cities in Central and Eastern Europe** features the Country PMR Retail Attractiveness Index™ and the City PMR Retail Attractiveness Index™. Those composite ratings are based on the supply of hypermarkets and discount stores per citizen in the region, the number and surface of shopping centres per citizen, wage and demographic data, and growth projections for the economy in general and the retail sector in particular. They constitute a valuable tool for current retail operators and those seeking to enter the industry or invest in retail development in the Eastern European region.

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## Key sections

**Methodology** presents an in-depth discussion of the methodological approach employed in the report, examining in detail the parameters of the retail market in Central and Eastern Europe. Readers learn detailed information on the countries and cities that are ranked for retail attractiveness, which constitutes the source of the provided data. The environment is presented by means of maps and charts, and the information about the existing retail operations in the subject countries is provided in terms of retail formats in current use and retail chains in operation across the region.

**Section One** provides a **detailed ranking of cities** with populations of over 100,000 (500,000 in Russia), presented by country, city and the PMR Retail Attractiveness Index™. The ranking is based on a variety of information sources such as the GDP and the retail sales growth prognosis, current supply of retail surface per citizen in the region, the number of shopping centres, regional population and wage statistics.

**Section Two** presents a up-to-date **macroeconomic overview of the region**, integrated with retailer information such as location and number of outlets for foreign retailers, some of which is provided in convenient map and table formats.

**Section Three** presents brief but detailed **profiles for the Central and Eastern European countries** of Poland, the Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Russia and Ukraine. Profiles include general economic information updated with data from 2009 such as the GDP, population and income as well as retail market statistics, such as retailer market shares and the number of foreign retailers active on the markets of each country.

There are 288 cities  
with populations  
in excess of 100,000  
in the analysed  
countries of Central  
and Eastern Europe.

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Because of the size of its population and its economy, Russia accounts for more than half of the total monetary value of retail trade in Central and Eastern Europe.

## Report overview

**Retail opportunities in major cities in Central and Eastern Europe** is a highly detailed document, designed to include all the necessary data required by businesses for successful strategy development.

Report methodology and objectives are thoroughly explained before proceeding to examine the retail background of the CEE countries covered in the document. Topics include:

- list of countries and cities covered by the report
- list of retail formats and chains at work in the marketplace
- definitions of terms and criteria of covered countries and cities
- exchange rates of various currencies involved in the market.

Eight countries in the Central and Eastern Europe are ranked using the Country PMR Retail Attractiveness Index™. This index is based on the following criteria:

- updated macroeconomic characteristics and demographics
- data on retail trade development and concentration level.

Moreover, 175 cities with populations of above 100,000 (in Russia 500,000) are ranked using the City PMR Retail Attractiveness Index™, a ranking based on the following information:

- population and population density
- number of hypermarkets and discount stores per 100,000 citizens
- area of shopping centres per 1,000 citizens
- number of major retail chains present
- the Country PMR Retail Attractiveness Index™ for the relevant country.

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Country profiles enhance the informational value of the report and complete the market picture initiated by the rankings. Profiles provide the following information for each of the included CEE country:

- GDP total (€ bn) – updated Feb 2009
- GDP per capita PPS (EU27 = 100) – updated Feb 2009
- average wage (€)
- value of retail trade (€ m)
- population
- urban population
- cities with the population of above 100,000 (list and share in total population)
- market shares of top ten retailers.

A comprehensive overview of economic and market conditions in the CEE region puts the retail attractiveness rating in context and facilitates the evaluation of various countries and cities in terms of their potential for success. The overview includes:

- a map of the CEE region
- updated macroeconomic data applicable to the region
- key data on the retail sector in eight CEE countries.

Saturation and the growing competitiveness of the Central European markets have made international retail companies more prone to invest in stores in Romania and Bulgaria.

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In the Czech Republic, multinationals dominate in all modern formats, particularly with regard to hypermarkets and discount stores.

## The information provided in Retail opportunities in major cities in Central and Eastern Europe targets the needs of:

- retail businesses currently operating in CEE, particularly operators of grocery retail outlets such as hypermarkets, supermarkets and discount stores
- retail industry executives and consulting companies
- companies that produce and distribute all types of FMCG goods
- companies that depend on the conditions in the retail sector as part of their operational strategies
- companies planning investment in Central and Eastern Europe.

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