

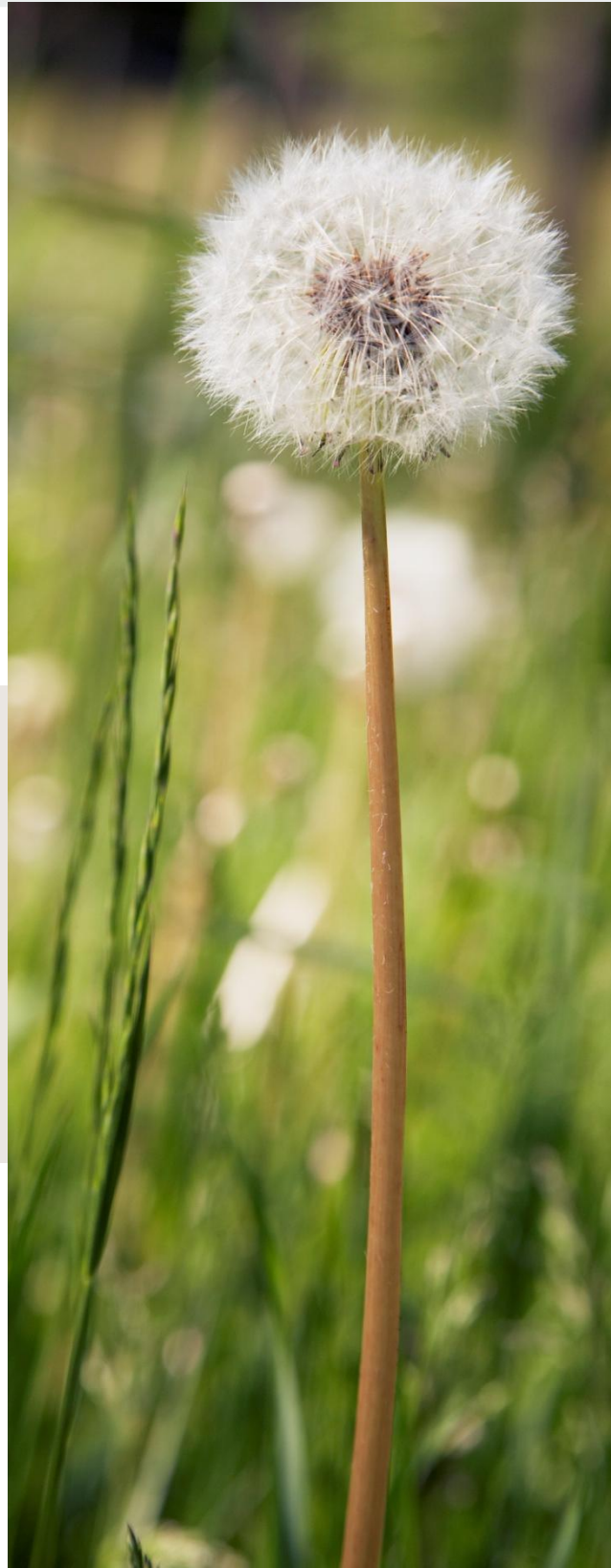
## Welcome to the Romanian Retail Reports

Recent years have seen us arrive at an intersection of two powerful forces that shape the global as well as local world of FMCG retailing. On one hand we continue to see the modernization of trade and, at the same time, retailers are trying to cope with the different ways in which consumers are responding to the changing economic environment.

**GfK Romanian Retail Report** seeks to show the main changes within shopping behavior focusing on market concentration, outlet types market share & purchasing structure changes, distribution by regions, by community size & by product baskets and private label development.

**GfK Beyond the Trends Report** reveals the level of competitiveness between outlet types, value flow, shopper duplication and their socio-demographic profile.

Beyond a declining domestic consumption retailers as well as producers must understand the shopping behavior of Romanian consumers in order to create experiences that drive sales in-store.



## Romanian Retail Report 10<sup>th</sup> Edition

- Detailed Content -



### 1. Romanian Economy in General

- Basic information about Romania
- Selected economic indicators of Romanian economy
- Comparison of selected economic indicators: Romania vs. EU 27
- Purchasing power comparison in Europe in 2010
- Purchasing power comparison previsions for 2015
- Average net and gross wages evolution 2000 – 2011
- Personal consumption structure evolution
- Household structure – family life cycle

### 2. Retailers Distribution in Romania

- Population distribution vs. Retailers distribution by regions and main counties
- The most valuable Romanian companies in 2010

### 3. Retail Trade Market

#### Major Player on the scene

- Top 10 leading accounts in Romania
- Market concentration – Top 10 Accounts' shares across CEE region – 2011
- Most important retailers by leaflets activity – 2011
- Count of promoted products by retailers – food and beverages; personal care; clothing & footwear
- Basic information on top 10 leading accounts

### 3. Retail Trade Market

#### A General Outlook on Retail Trade Market

- Outlet types – market shares & purchasing structure
- Outlet types – distribution by regions, community size, product baskets
- Outlet types – distribution by community size
- Purchasing structure by outlet type
- Purchasing behavior in Romania: value of average spending by community size; frequency

#### A Closer Look Into Private Labels

- Private Labels shares within FMCG baskets
- Penetration Rate for Private Labels among segments
- Private Labels of the retailers within leaflets' activity
- The importance of Private Labels across CEE markets
- Selected categories with high Private Labels shares

## Beyond the Trends Report 4<sup>th</sup> Edition

- Detailed Content -



### 1. What are the **growth/decline sources** behind channels evolution and how strong is the value flow between channels formats?

- Gain & Loss Analyses for the most important modern trade retail channels: supermarkets, hypermarkets, discounters, small food stores. January – June 2011 vs. January – June 2010

### 2. **Where** do shoppers of supermarket/ hypermarkets/ discounters also purchase?

- Retail Channel Duplication for the most important modern trade retail channels: supermarkets, hypermarkets, discounters, small food stores. January – June 2011

### 3. Supermarkets, Hypermarkets, Discounters, Small Food Stores **Shopper Profile**

- Socio-demographic profiles by household size, age of head of household, size of community, income, presence of children up to 14 years

### 4. **Private Label** market share within Supermarkets, Hypermarkets, Discounters, Small Food Stores

#### Investment Details

#### **GfK Romanian Retail Report**

2.200 EUR [9.240 RON]

1.700 EUR [7.140 RON] if previous edition purchased

#### **GfK Beyond the Trends Report**

2.400 EUR [10.080 RON]

#### **Subscription to both reports**

3.680 EUR [15.470 RON]

3.280 EUR [13.750 RON] if GfK Romanian Retail previous edition purchased

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