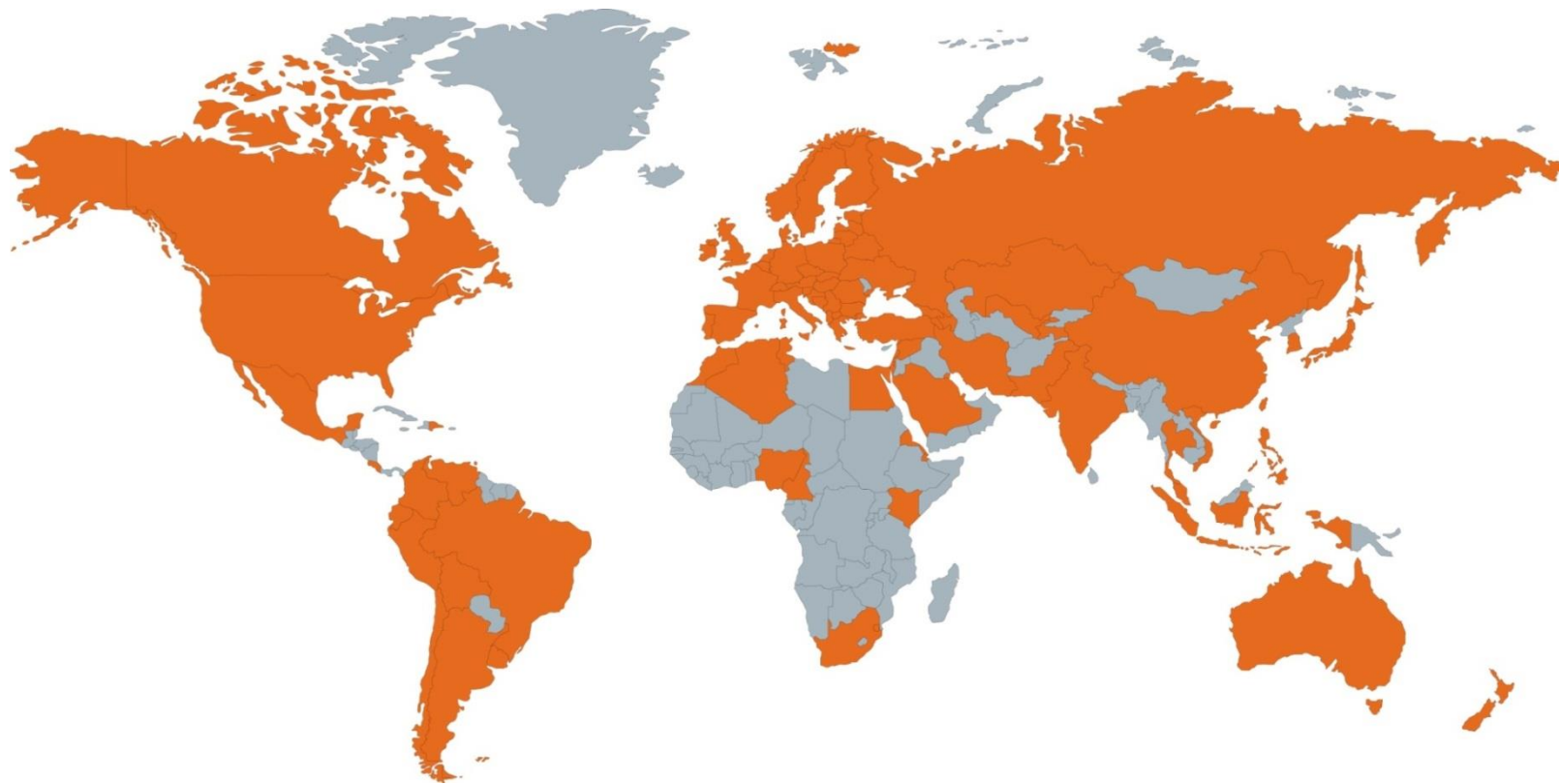


Исследования индустрий в странах
с помощью аналитиков находящихся в каждой из них



Рынки массового потребления:

80 основных стран

- ✓ 85% мирового населения
- ✓ 99% глобального потребления

Страны и потребители:

210 стран

Методология исследований

GLOBAL INSIGHT

INDUSTRY SPECIALISATION

Dialogue with key players,
global research inputs

COMPANY ANALYSIS

Global and local company
data and accounts

TRADE SURVEY

Discussion on data and
dynamics with local industry

DESK RESEARCH

All public domain material
accessed and interpreted

STORE CHECKS

A first-hand view of place,
product, price and promotion

MARKET ANALYSIS

Data substantiated,
market trends explained

DATA VALIDATION

Exhaustive audit and
cross-referencing of data





LOCAL KNOWLEDGE

Контент Passport

Consumer Products

- | | |
|--|--|
|  Alcoholic Drinks |  Home Care |
|  Apparel |  Hot Drinks |
|  Automotive |  Luxury Goods |
|  Beauty and Personal Care |  Packaged Food |
|  Consumer Appliances |  Pet Care |
|  Consumer Electronics |  Personal Accessories |
|  Consumer Health |  Soft Drinks |
|  Eyewear |  Tissue and Hygiene |
|  Fresh Food |  Tobacco |
|  Health and Wellness |  Toys and Games |
|  Home and Garden | |








Services

-  Consumer Finance
-  Consumer Foodservice
-  Retailing
-  Travel and Tourism

Countries and Consumers

-  Countries and Consumers
-  Consumer Trends and Lifestyles
-  Economy, Finance and Trade
-  Government, Labour and Education
-  Income and Expenditure

Suppliers

-  Industrial
-  Ingredients
-  Packaging
-  Industry, Infrastructure and Environment
-  Population and Homes
-  Technology, Communications and Media
-  Survey

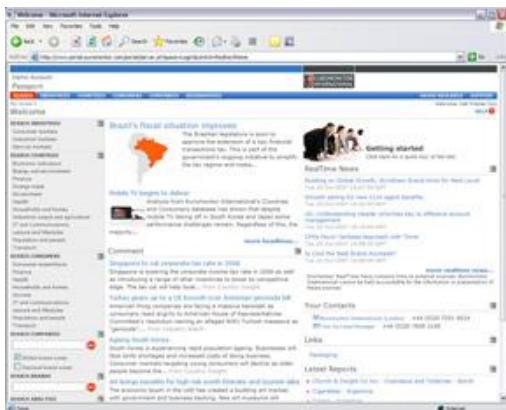
 **Cities**

CAMI

Обзор Passport

■ Что это?

- ✓ Ворота в мир глобальной стратегической информации
- ✓ Полная информационная архитектура для Вашей организации
- ✓ Структурированные данные по отраслям и их анализ



■ Для чего это?

- ✓ Полная картина бизнес среды
- ✓ Возможность отслеживать ситуацию на рынках и смежных отраслях, условия работы, потребительские тенденции
- ✓ Эффективное использование информации



■ Что в нём?

- ✓ Статистика, отчеты, комментарии
- ✓ 4,000 видов продуктов и услуг
- ✓ 115 миллионов единиц данных
- ✓ 17,000 полных текстовых отчетов: глобальных, региональных, по странам, по компаниям



Индустрии



Страны



Потребители

Passport это

- Набор уникальных инструментов для решения задач любой сложности
- Интегрированный доступ к международным статистическим данным, детальным отчетам и актуальным комментариям экспертов мирового уровня
- Широкий спектр данных, содержащий точечный анализ по любой отрасли или стране мира
- Регулярно обновляемый и пополняемый информационный массив
- Интуитивно-понятный интерфейс

Market Sizes | Historic | Number of Trips | '000 trips

Key: Related Analysis Chart this Row Analysis by country

| Change View | | 2005 | 2006 |
|--------------------------|-------------------------------------|-------------------------|--------------|
| United Kingdom | | | |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Australia | 910,6 94 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Austria | 271,3 28 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Belgium | 670,1 61 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Canada | 790,8 86 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Denmark | 507,0 49 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from France | 2.826,0 3.13 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Germany | 3.024,9 3.14 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Ireland | 2.782,2 2.79 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Italy | 1.159,2 1.42 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Arrivals from Japan | 321,8 33 |

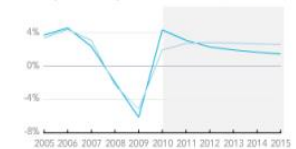
CAR RENTAL



USA QUICK STATS



CATEGORY YOY GROWTH COMPARISON



Особенности системы

- вся информация стандартизирована для возможности сравнения индустрий/категорий в разных странах
- статистические таблицы, отчёты по категориям и странам, комментарии аналитиков, профилирование компаний
- дефиниции категорий с точными определениями
- возможность экспортировать документ в pdf-файл, эксель, сохранить на интернетовской страничке
- постоянная помощь нашего специалиста при поиске информации и обучении коллег



В какой форме вы получаете информацию

Statistics

Market Sizes | Historic | Number of Trips | '000 trips

Key: Related Analysis Chart this Row Analysis by country

| Change View | 2005 | 2006 |
|---|-------------------------|--------------|
| United Kingdom | | |
| <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> | Arrivals from Australia | 910,6 94 |
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| <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> | Arrivals from Japan | 321,8 33 |

Country reports

Inbound Tourism | Travel & Tourism: Lisbon | © Euromonitor International

Inbound Arrivals by Source Country

Crisis leads to tourism decline

- According to the National Statistics Institute (INE) and Turismo de Lisboa, the various types of accommodation throughout Lisbon city registered an estimated total of 1.9 million international arrivals in 2009, representing a decrease of 4.3% over the previous year.
- A sharp decline in major inbound markets as a direct result of the global economic crisis was the major reason behind the negative performance over the year.
- In Europe, the number of tourists coming to the city from the UK dropped by 21%, while Italy and Germany also experienced significant declines of 13% and 7%, respectively.
- On the other hand Spanish and French visitor numbers grew by 3.5% and 2%, respectively, but not enough to offset the losses by their European counterparts.
- Declines by other major markets outside Europe included Brazil and Japan, which fell by 10% and 5%, respectively, while US visitor numbers grew by 3.3%.
- Over the forecast period arrivals to Lisbon hotel establishments are forecast to grow by almost 16% as a result of gaining back international demand with the recovery of its major feeder markets and the popularity of Lisbon as an affordable, culture-laden city break destination.

International Hotel Establishment Arrivals to Lisbon City by Country 2009/2014

| '000 people | 2009 | 2014 | % growth |
|-------------|---------|---------|----------|
| Spain | 353.8 | 407.3 | 15.1 |
| France | 171.0 | 186.9 | 9.3 |
| Germany | 159.7 | 182.0 | 14.0 |
| Italy | 140.1 | 158.9 | 13.4 |
| UK | 121.2 | 134.7 | 11.1 |
| Brazil | 156.1 | 195.7 | 25.4 |
| US | 126.5 | 138.5 | 9.5 |
| Canada | 23.0 | 24.9 | 8.3 |
| Japan | 29.3 | 33.0 | 12.6 |
| Other | 600.6 | 711.0 | 18.4 |
| TOTAL | 1,881.3 | 2,172.9 | 15.5 |

Source: INE/Turismo de Lisboa/Euromonitor International estimates

Global reports and briefings

Tourism Overview | Travel and Tourism: Africa | © Euromonitor International

Africa vs Global Tourism Performance

- Although numbers of visitors are smaller than for most other regions, Africa's growth between 2004 and 2009 was outpaced only by the Middle East and North Africa region.
- Growth of 9.3% is expected for 2010, and visitor numbers are expected to reach 39 million by 2014.
- South Africa, Madagascar, Kenya and Zambia are all predicted to show growth of over 10% in 2010.
- Of the world's Top 50 tourism destinations according to the number of arrivals, as defined by UNTWO, only South Africa (25th) makes it onto the list.

Arrivals Performance by Region

| Region | 2004/2009 CAGR % volume | 2009/2014 CAGR % volume |
|----------------|-------------------------|-------------------------|
| Africa | ~6.5 | ~9.3 |
| MENA | ~8.5 | ~8.5 |
| Asia | ~4.5 | ~5.5 |
| Eastern Europe | ~1.5 | ~4.5 |
| Latin America | ~2.5 | ~3.5 |
| Western Europe | ~1.5 | ~2.5 |
| North America | ~1.0 | ~2.5 |
| Australasia | ~1.0 | ~4.0 |

City reports/briefings

- Despite the global economic downturn and the Chinese government's financial stimulus to boost domestic tourism, outbound departures still increased by 3% in 2009, to 49 million visitors. During the forecast period, outbound departures are expected to increase by a 7% CAGR, to 49 million visitors.
- China is touted as the next big economy, and the country was not badly affected by the economic downturn in 2009. Outbound expenditure injected a much-needed RMB268 billion into the economies of destination countries in 2009. As the global economy recovers and consumer confidence is regained, outbound tourist expenditure is expected to enjoy a 6% CAGR to reach RMB353 billion at the end of the forecast period.
- Hong Kong and Macau will remain China's favourite destinations going into the forecast period. However, as Chinese tourists become more adventurous, the Philippines will enjoy an extraordinary 29% volume CAGR. The lower cost of living in the Philippines and diversified tourist attractions, ranging from diving spots to historical sites, will attract 5.47 million visitors by 2014. More affluent Chinese tourists will want to travel beyond East Asia, and countries such as the US and Australia will enjoy strong volume CAGRs of 10% and 9% respectively in the forecast period.
- The rise of Chinese tourists has not gone unnoticed by NTOs in many countries. As traditional high spenders from the US and Europe cut down on long haul travel, Chinese tourists have been identified as replacements. Countries such as Thailand, Singapore, Malaysia and Australia are busy trying to attract Chinese tourists by setting up tourism offices in China, offering the Chinese language on their tourism websites. Chinese and regional low cost carriers will also drive outbound tourism.

CATEGORY DATA

Table 10 Departures by Destination: 2004-2009

| '000 people | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|------------------|---------|---------|---------|---------|---------|---------|
| Australia | 251.3 | 285.0 | 308.5 | 357.5 | 356.4 | 342.1 |
| Austria | 205.0 | 223.0 | 256.4 | 282.2 | 273.3 | 238.5 |
| Cambodia | 102.6 | 123.5 | 130.5 | 140.6 | 147.6 | 153.2 |
| France | 437.8 | 601.0 | 673.9 | 716.7 | 378.8 | 330.2 |
| Germany | 210.9 | 234.9 | 251.7 | 271.6 | 252.5 | 230.5 |
| Hong Kong, China | 7,788.4 | 8,026.5 | 8,440.2 | 9,090.2 | 9,380.0 | 9,411.3 |
| India | 34.1 | 44.9 | 62.3 | 88.1 | 53.3 | 41.0 |

Company Profiles

Brand Strategy | Consumer Appliances: Samsung Corp | © Euromonitor International

Homogenising the brand strategy

- Samsung deliberately makes as few regional-specific branding concessions as possible, and the company's declared strategy is to create brand unity in all its global markets.
- Samsung is seeking to build stronger brand consistency on a global and regional basis. The company plans the roll-out of a global marketing strategy aimed at creating a consistent brand identity across product categories in 50 markets, and will invest in brand-building sponsorship and product design to create a more unified brand spanning products in its mobile, TV, home entertainment, IT, appliances and business divisions.
- This unification took a variety of forms. Most visibly, it was implemented by its two principal sports sponsorship deals – the company was a global IOC Olympic Games partner for Beijing 2008 and the shirt sponsor of Chelsea FC, with a 5-year deal worth an estimated £50 million, which began in 2005. Until the 2008-2009 season, Chelsea shirts carried the Samsung Mobile logo, but now reads only Samsung, to promote the core brand.
- The brand continues with its strategy to promote itself through important sports activities such as the Vancouver 2010 Winter Olympic Games and promoted cross-marketing campaigns with luxury brands while creating products in partnerships with other companies to increase their premium image.

- The company has also launched a number of stand-alone retail outlets for the whole Samsung Electronics portfolio, as well as a number of in-store stores in electrical specialists, in selected markets.
- These retailers support brand unity by carrying a full range of consumer appliances and consumer electronics.

Dashboards

CAR RENTAL | Currency: \$ | © Euromonitor International

Forecast Growth

- 11.4 - 18.8%
- 4.4 - 8.0%
- 2.5 - 4.5%
- 0.0 - 2.0%
- 0.0 - 0.7%
- 1.2 - -34.0%
- Not Estimated

QUICK STATS

- Market Size: 21,806.4 (2010, US\$ m)
- Per Capita: 70.6 (2010, US\$)
- Growth: 2.1% (2010-15 CAGR)

PERCENTILE RANKING

CATEGORY YOY GROWTH COMPARISON

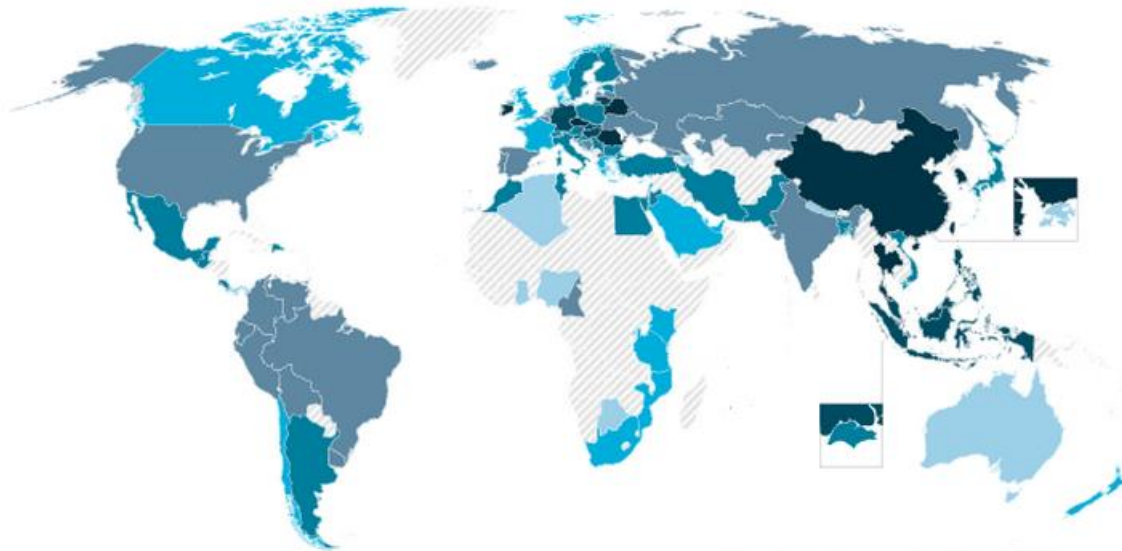
+ links to real time news sites

PASSPORT: INDUSTRIAL



Passport Industrial - обзор на 360° каждой отрасли промышленности

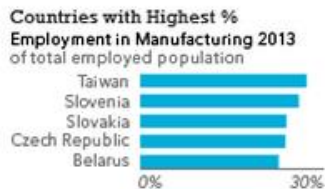
DATAGRAPHIC BUSINESS ENVIRONMENT
The Global Picture of Manufacturing



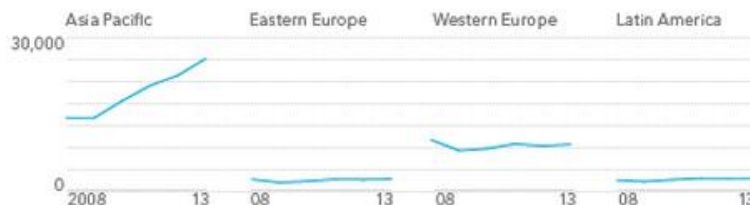
Manufacturing as a % of Total GDP in 2013

- 25.0+
- 20.0-24.9
- 15.0-19.9
- 12.0-14.9
- 8.0-11.9
- 0.0-7.9
- ▨ Not Illustrated

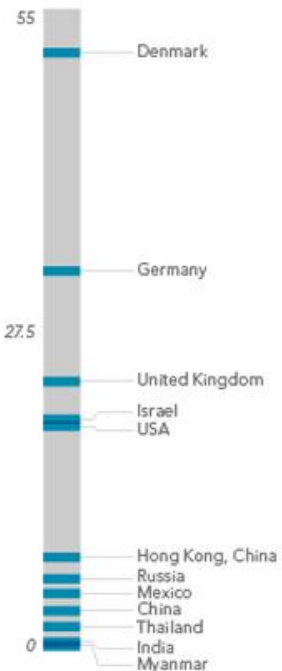
TAIWAN
27%
of employed population in manufacturing, highest globally in 2013



Total Manufacturing Production by Region in 2013
US\$ billion



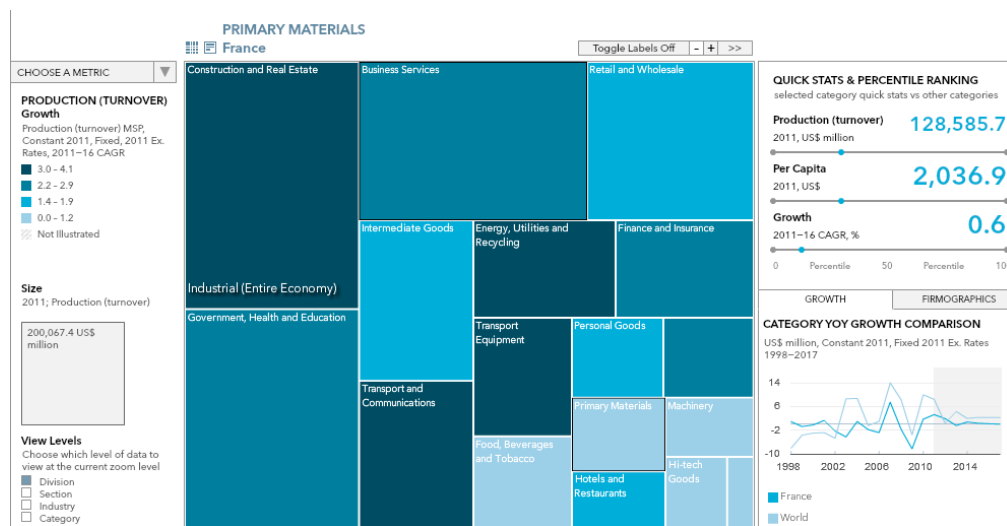
Manufacturing Wage in 2013 in Selected Economies
US\$ per hour



Passport Industrial (B2B)

Passport Industrial ОБЗОР ВСЕХ ОТРАСЛЕЙ ЭКОНОМИКИ: 18 КРУПНЕЙШИХ СТРАН

Уникальное исследовательское решение, предоставляющее анализ 177 отраслей промышленности 18-ти крупнейших экономик мира, представляющих в общей совокупности 78% мирового ВВП. Passport Industrial является ведущей онлайн-системой информации высокого уровня о рынке. Предлагается интуитивно понятная навигация по мощным статистическим данным и отчетам, при помощи которой пользователи наглядно воспринимают большие объёмы информации, что помогает принять ясные, уверенные решения.



Все кластеры экономики

Industrial

SEARCH TREE

Select category... ▼

Go >

ANALYSIS FINDER

All Analysis ▼

Select Geography ... ▼

Go >

RANK COUNTRIES

Choose a category ▼

Size Forecast
 Growth Historic
 Per cap.

Go >

RANK CATEGORIES

For a geography... ▼

Size Forecast
 Growth Historic
 Per cap.

Go >

Analytic Industrial ▼

Go >

Articles and opinions etc.

Russia's Space Industry is about to Regain Its Former Glory. Or Is It?

Opinion | 29 Apr 2013



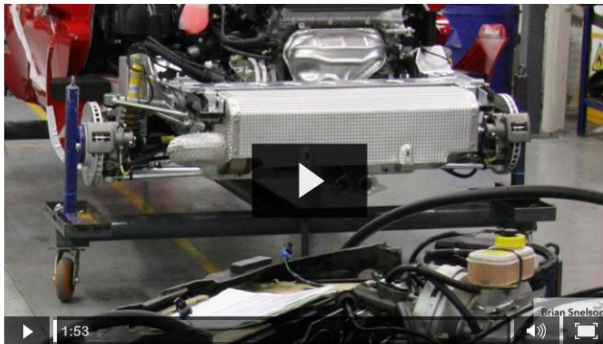
Vykintas Marscionka
Analyst - Industrial

After a protracted period of decline and several recent launch failures, Russia is aiming to restore some of its former glory by boosting space industry spending more than RUB1.6 trillion over the period of 2013-2020, which includes building new launch pad and developing rockets able to reach moon and even Mars. However, current state of the industry might prove too big of a

burden to achieve these monumental goals.

Car Manufacturers in Russia Enjoy Robust Growth

Videocast | 26 Apr 2013



Government Hopes to Bolster Shipbuilding in Russia

Podcast | 18 Mar 2013



The Russian government hopes to change problems in the shipbuilding industry with an investment in a long term commercial program.

Production Trends

- Despite increasing import penetration, the growth of the local industry market, as the industry's turnover expanded by 41% over the review pe 2012.
- Manufacturing of taps and valves was the fastest-growing category, in annum and being the largest sector in the industry with 36% of total turn in share from 2006. The pumps category increased by 45% and became industry with a 27% share in 2012. Parts, maintenance and installation re with 25% of total turnover at the end of the review period.

Reports

Supply structure

Chart 11 Supply Structure (€ million, in 2012)

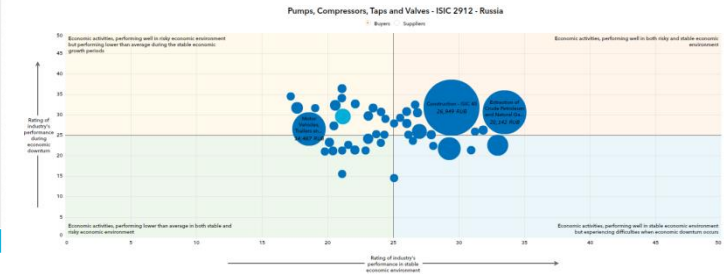
| | | |
|-------|--|-------|
| 194 | Profit | 3.8% |
| 21.1 | Taxes less Subsidies | 0.4% |
| 2,043 | Labour Costs | 39.6% |
| 188 | Monetary intermediation | |
| 50.4 | Architectural and Engineering Services | 10.8% |
| 318 | Other | |
| 52.7 | Road Passenger and Freight Transport | 1.8% |
| 39.8 | Other | |
| 83.7 | Production, Collection and Distribution of Electricity | 3.3% |
| 86.6 | Other | |
| 280 | Pumps, Compressors, Taps and Valves | |
| 132 | Cutlery, Hand Tools and General Hardware | 13.4% |
| 278 | Other | |
| 1.3 | Manufacturing Residuals | |

Key players

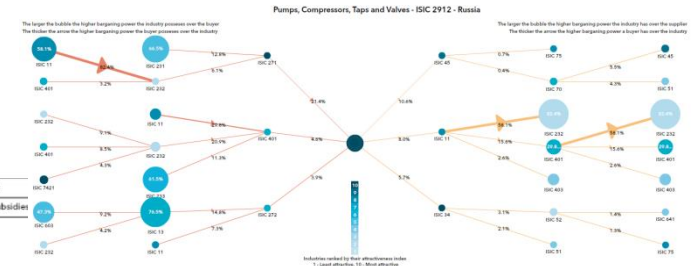


- 5.8% Grundfos Istra OOO
- 5.3% Ural elektrozavshash Uralgidromash OAO
- 4.4% GK Novomet
- 4.2% Tyazhprommash ZAO
- 3.6% Kovrovskiy Melkhanicheskiy Zavod OAO
- 3.4% Gidromashservis ZAO
- 73.3% Other

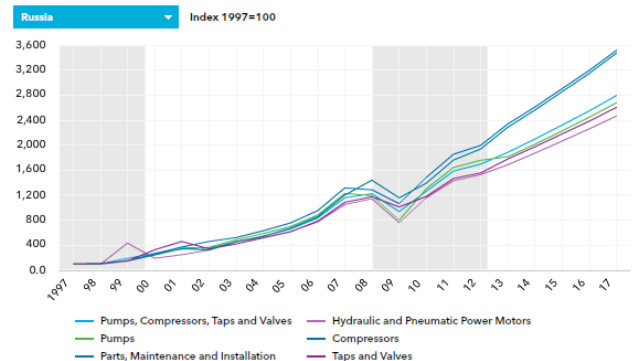
Attractiveness index



Industry environment



Industry and sector forecasts



Passport Industrial - обзор на 360° каждой отрасли промышленности

СТАТИСТИКА

ПРОИЗВОДСТВО

- »» 5 лет прогноза
- »» Производство в денежном выражении в ценах производителя
- »» Индекс цен производителей
- »» Индекс объема производства

ИМПОРТ И ЭКСПОРТ

- »» объем импорта и экспорта
- »» Топ 5 направлений экспорта
- »» Топ 5 направлений импорта
- »» Доля импорта в размере рынка
- »» Доля экспорта в производстве
- »» Внешнеторговый баланс

РАЗМЕРЫ РЫНКА

- »» Объемы продаж по цене закупщиков
- »» Объемы закупок домохозяйств
- »» Объемы B2B покупок
- »» Объемы государственных закупок

ФИРМОГРАФИКИ

- »» Количество компаний
- »» Кол-во микро, экстр малых, малых, средних и больших компаний
- »» Доля производства микро, экстр малых, малых, средних и больших компаний
- »» Доли компаний для Топ 5 производителей

ОТРАСЛЕВЫЕ ЦЕНЫ И ДОХОДНОСТЬ

- »» Стоимость труда
- »» Кол-во рабочих
- »» Средние зарплаты
- »» Налоги
- »» Операционные и производственные затраты
- »» Прибыль
- »» Доходность (%)

ИНДЕКС ПРИВЛЕКАТЕЛЬНОСТИ

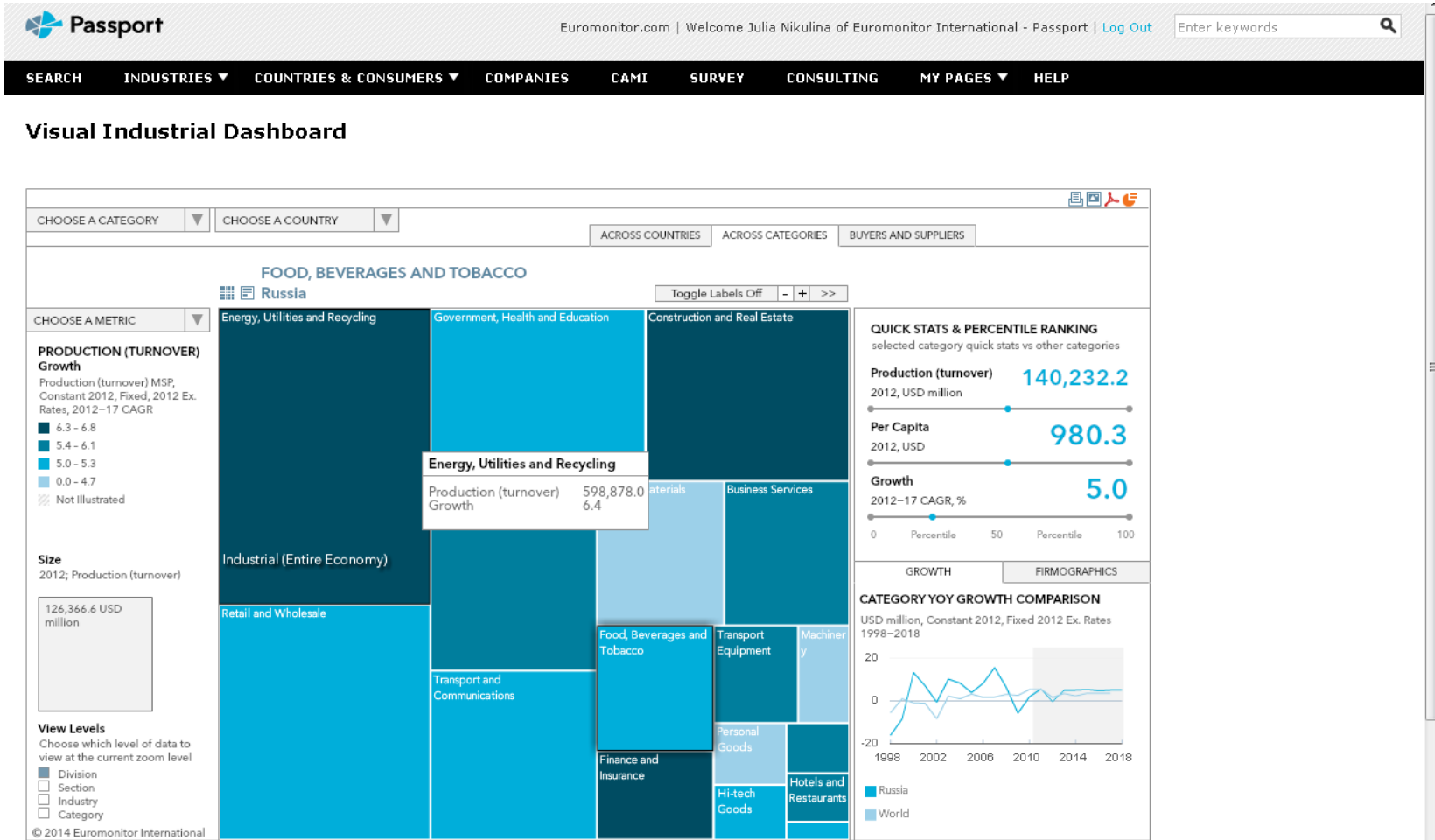
- »» Всеобъемлющая оценка функционирования отрасли в стабильных и сложных экономических условиях

ОТЧЕТЫ

- »» Свыше 3000 отчетов
- »» Анализ ключевых тенденций для всех 177 индустрий

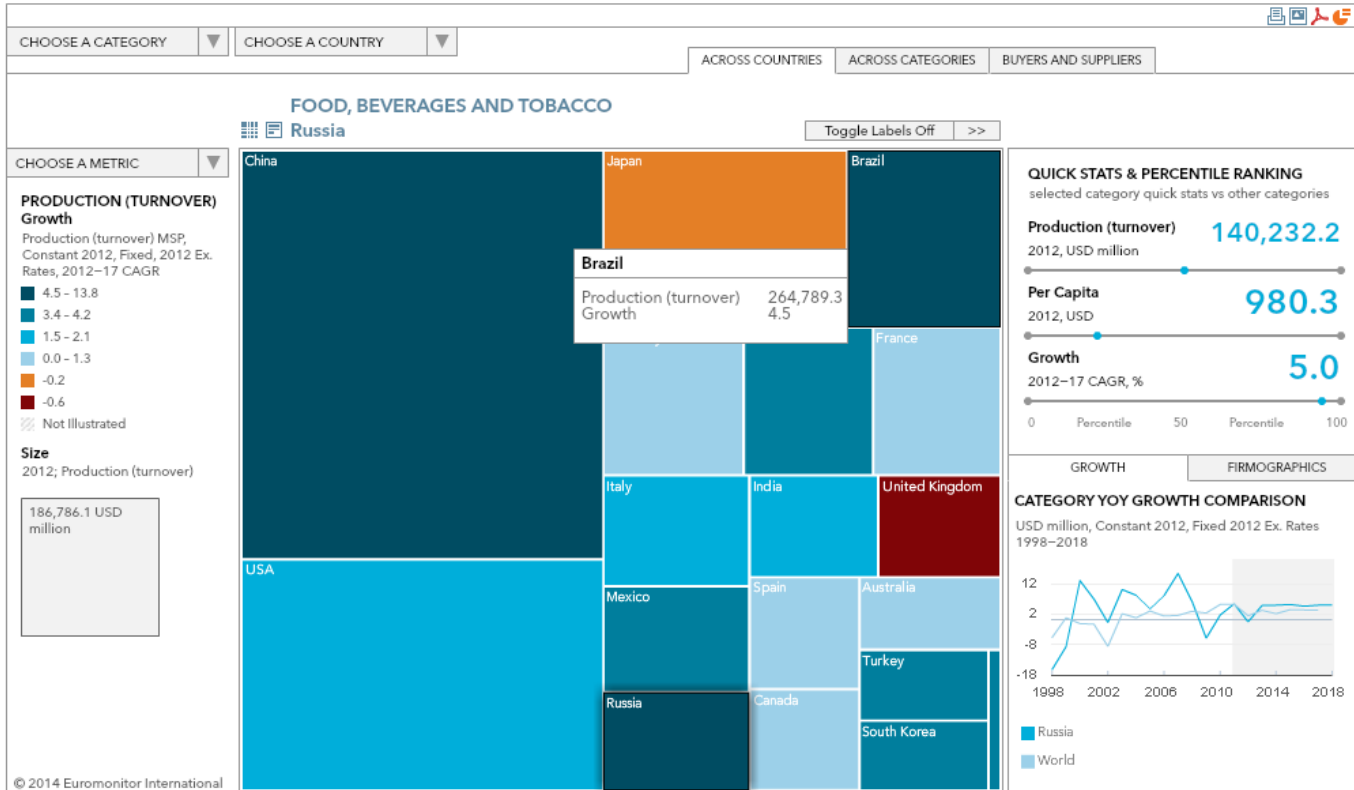
| Category | Value (R\$ million) | Sub-category | Percentage | Group |
|--|---------------------|----------------------|------------|----------------------|
| | RS 94,034 | Profit | 31.5% | Profit |
| | RS 11,940 | Taxes less subsidies | 4.0% | Taxes less subsidies |
| Compensation of employees | RS 54,172 | Labour | 18.1% | Operating costs |
| Collection and distribution of water | RS 280 | | | |
| Production, collection and distribution of electricity | RS 257 | Utilities | 0.1% | |
| Other | RS 19.1 | | | |
| Monetary intermediation | RS 2,164 | | | Operating costs |
| Architectural and engineering services | RS 1,087 | Services | 3.3% | |
| Insurance and pension funding | RS 793 | | | |
| Other | RS 5,811 | | | Operating costs |
| Road passenger and freight transport | RS 3,227 | Transport | 1.4% | |
| Other | RS 998 | | | |
| Printing | RS 82.7 | Other costs | 0.0% | Other costs |
| Other | RS 80.0 | | | Other costs |
| Construction | RS 6,683 | Intra-industry trade | 2.2% | Cost of materials |
| Ceramic, clay, cement, lime and stone products | RS 44,222 | | | |
| Basic iron and steel | RS 9,990 | Non-durable goods | 30.4% | |
| Paints and varnishes | RS 9,005 | | | |
| Other | RS 27,463 | | | Cost of materials |
| Metal products for household use, vehicles and packaging | RS 4,633 | Durable goods | 7.0% | |
| Structural metal products | RS 3,289 | | | |
| Other | RS 13,015 | | | |
| Quarrying of stone, sand and clay | RS 4,966 | Primary goods | 1.6% | Cost of materials |
| Other | RS 0.0 | | | |

Продажи B2B – оцените самые большие категории

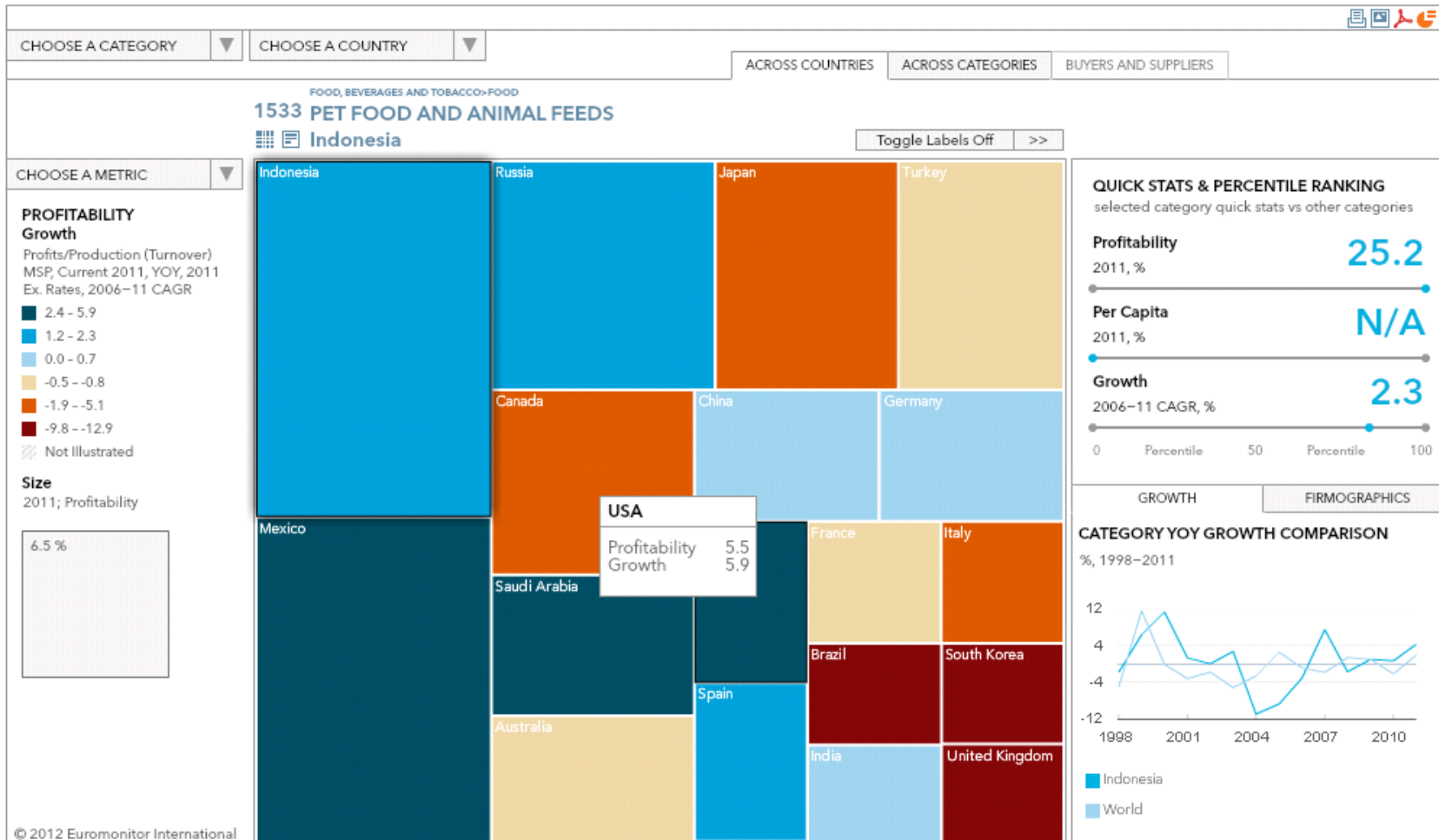


Стратегический подбор источников – кто является экспортерами?

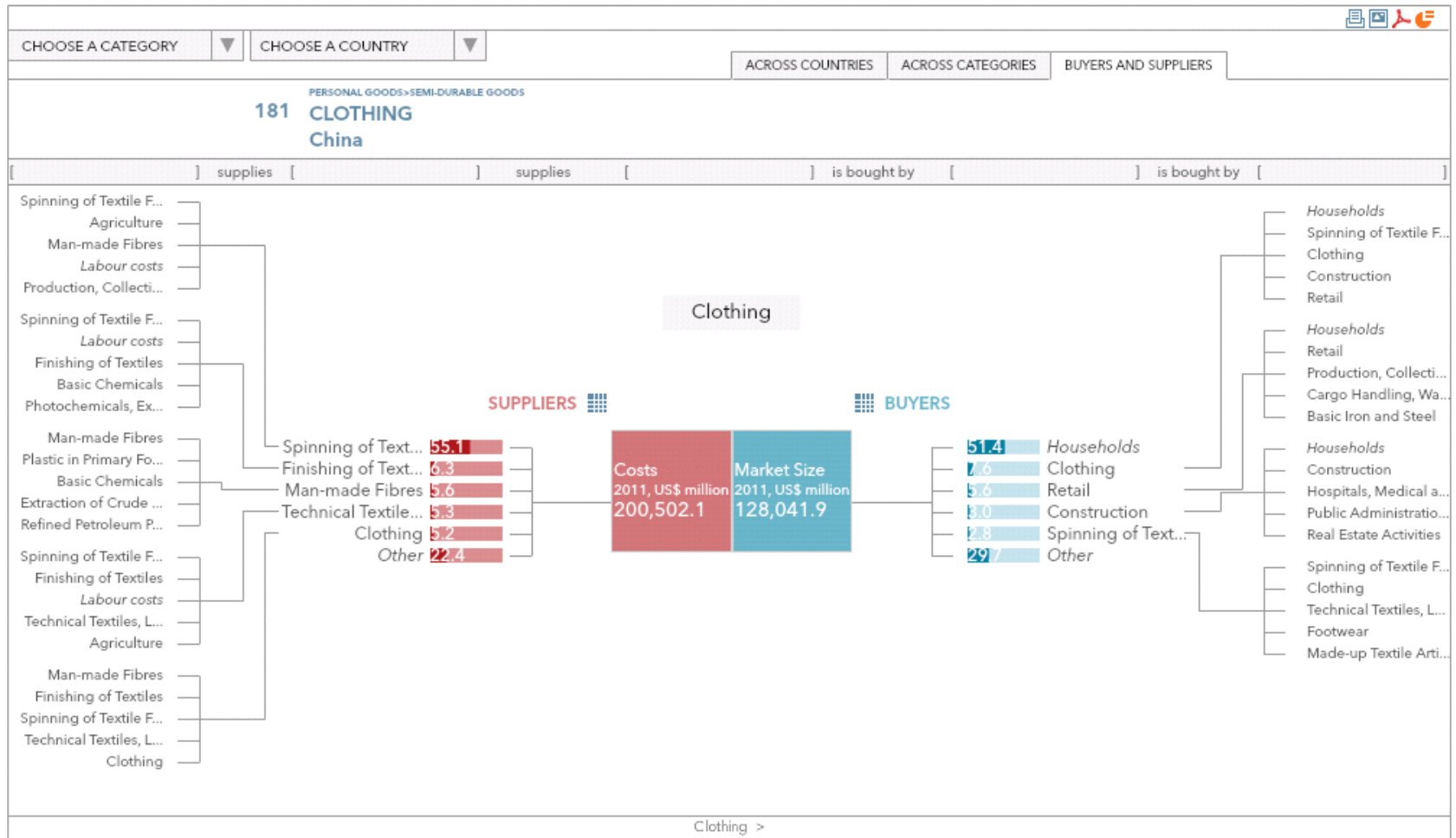
Visual Industrial Dashboard



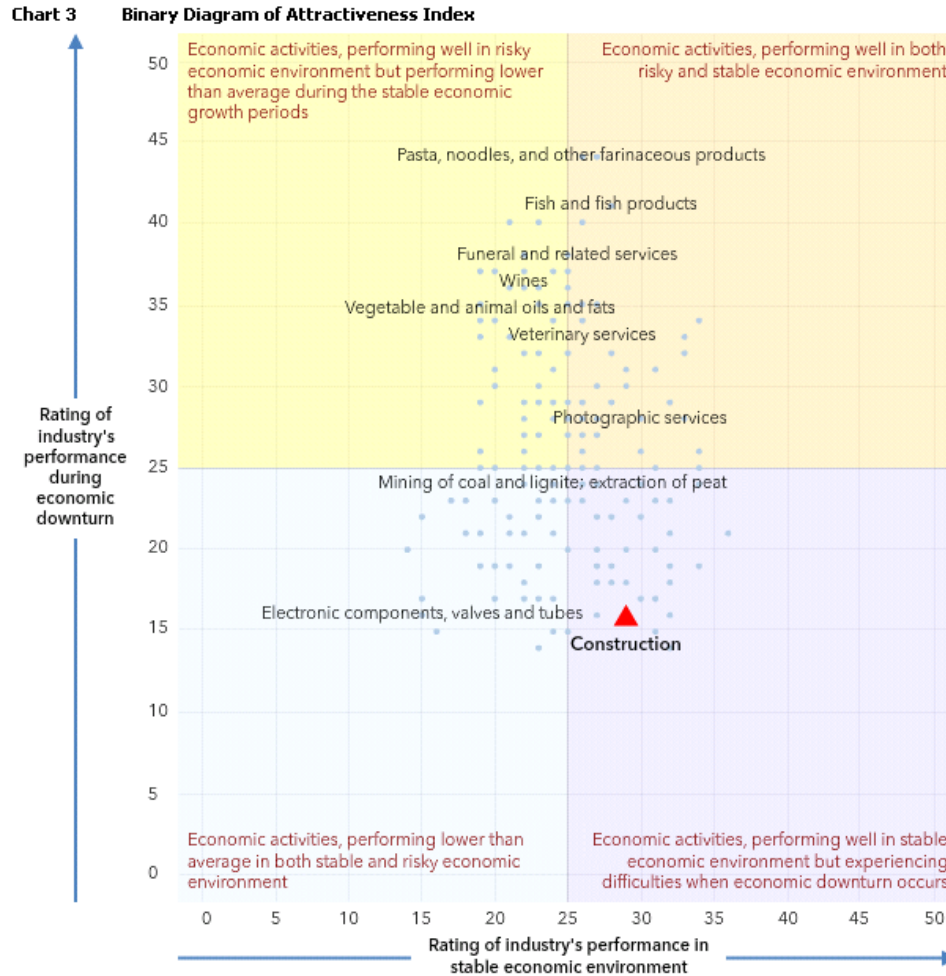
Стратегический подбор источников – кто на этом больше всего зарабатывает?



Анализ взаимодействия отраслей – клиенты/поставщики?



Управление рисками – насколько стабильна изучаемая отрасль?



PASSPORT: CITIES



Паспорт: «Города» - это наиболее важный источник социально-экономических показателей, аналитических данных, экспертных оценок по различным городам мира.

DATAGRAPHIC CITIES
Exploring Emerging Cities Beyond BRIC

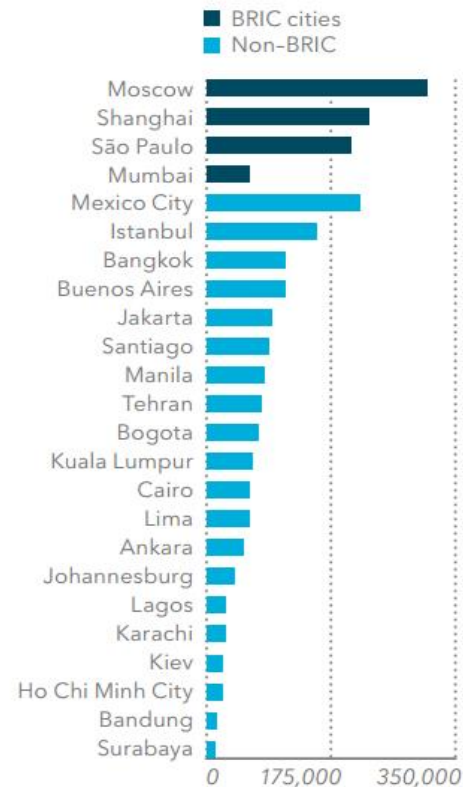
20 Largest Emerging Consumer Markets Outside BRIC

Comparing Non-BRIC Cities to BRIC Megacities
 income per hh & share of hh with income US\$10k+ in 2013



Total Disposable Incomes

Non-BRIC vs. BRIC cities
 US\$ million in 2013



1 150 городов мира

- » исторические данные на период 2005-2012 г. и прогнозы до 2020 года
- » 120 городов 1 уровня с 270 социально-экономическими показателями
- » 730 городов 2 уровня с 170 социально-экономическими показателями

| | | | | |
|---|--|---|--|--|
| Report structure | Economy of the city | Consumer profile | Consumer expenditure: City lifestyle | Consumer expenditure: City affordability |
| Understanding cities: key relationships | Economic structure of the city and its productivity advantage... | ...usually result in higher average household income... | ...which determines consumer preferences... | ...while transport and housing expenses often eat-up income surplus. |
| Key measures | Productivity (GDP per employee) | Average annual household income | Consumer expenditure (excluding transport and housing) | Consumer expenditure on transport & housing |
| New York in 2011, compared to the rest of the country | +57.9% in productivity | +32.6% in household income | +13.0% in spending per household | +31.1% in spending per household |



Углубленный и своевременный анализ поможет Вам понять масштаб и направления экономических и потребительских тенденций в городах.

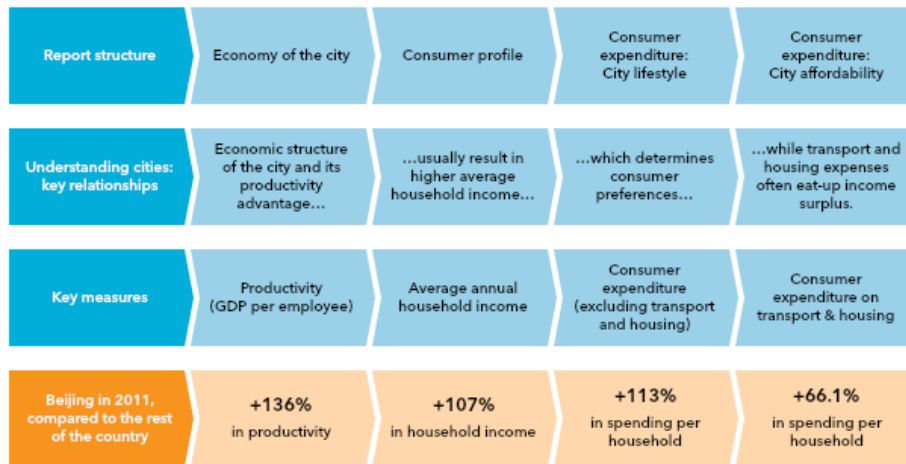
Beijing City Review

Cities | 03 Apr 2013

Beijing Review At A Glance

Understanding Beijing Review Structure

Chart 1 Overview



Source: Euromonitor International

Key Facts On Beijing

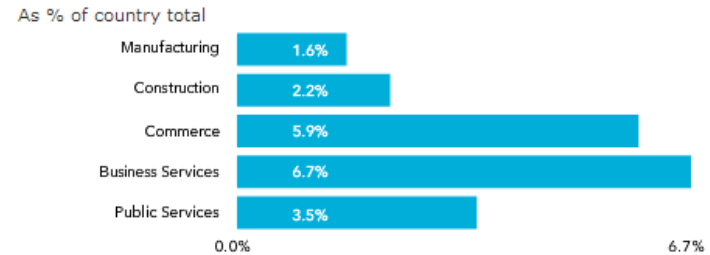
Summary 1 Key Facts On Beijing 2006, 2011, 2020

| Indicator | 2006 | 2011 | 2020 |
|---|---------|-----------|-----------|
| Share of Services (% of total GDP) | 64.0 | 67.7 | - |
| Total GDP (RMB million, current prices) | 811,780 | 1,665,528 | 4,346,648 |
| Real GDP Growth (%) | 13.0 | 12.1 | 8.0 |
| Unemployment Rate (%) | 2.0 | 1.4 | - |
| Population: January 1st ('000) | 15,967 | 20,185 | 25,736 |

Source: Euromonitor International

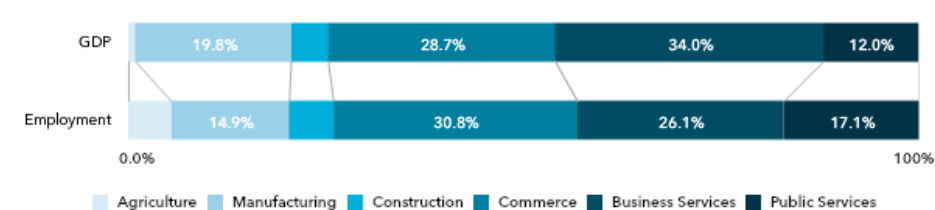
Industrial Make-up

Chart 3 GDP By Economic Sector 2011



Source: Euromonitor International

Chart 4 Industrial Composition Of Beijing 2011



Source: Euromonitor International

Beijing is regarded as the political, educational and cultural heart of China. In 2011, the city accounted for 4% of the country's total GDP, with a large part of GDP stemming from the service sector. Being an administrative centre, Beijing employs 17% of its workforce in the public services industry; for comparison, public services account for 13% of jobs in Shanghai and 15% in Guangzhou.

Beijing is striving to catch up with Shanghai and Hong Kong, China's economic and financial centres, and is focusing on attracting multinational corporations providing high value-added services. Admittedly, the city faces a number of urban challenges in its pursuit, such as water shortages and extreme pollution, which downgrades the attractiveness of Beijing to many investors.

Construction in the city has been considerably boosted by immense infrastructure developments and the opening of new venues, completed in time for the 2008 Olympics. Beijing is still experiencing rapid urban expansion, but, at the same time, the city is suffering from a severe shortage of land. Beijing's expansion is occurring at the expense of already scarce farmland, resulting in social conflict, not to mention inflated land prices.