

# Quantitative research of the Russian tea market (polling in 21 largest cities in Russia)



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### Methods of the research

1. Standardized interviews with tea consumers. The total sampling amounts to 1600 respondents. Representativeness of the sampling has been provided by use of quotes. Quotes on sex, age and income level have been established according to the socio-demographic parameters of the universal set. As polling grounds 13 cities with over-million population (Moscow, St.-Petersburg, Novosibirsk, Ekaterinburg, Nizhni Novgorod, Samara, Omsk, Kazan, Tchelyabinsk, Rostov-on-Don, Ufa, Volgograd, Perm) and 8 cities with population from 500 thousand up to 1 million (Voronezh, Krasnoyarsk Saratov, Tolyatti, Barnaul, Ulyanovsk, Izhevsk, Vladivostok) have been chosen.

2. In addition to data obtained from the quantitative research information from secondary sources and quotes from depth interviews with branch experts, managers and marketing specialists of the largest tea manufacturers is included. As secondary sources the most reliable ones have been used only (R-TGI research and retail audit).

The combination of these methods creates a true and complete picture of the market state, characteristic features of its development, and shows the most promising segments and market niches.

### Abstract

In April 2006 specialists of "Proryv" company conducted a quantitative research of the Russian tea market. The tea markets of 21 largest cities were the object of the research.

Consumers' behavior in the tea market of largest Russian cities is considered in detail. Data about number of consumers and its dynamics as well as about the place in urban life, which tea holds, are given.

Competition of tea with substitute goods is considered including information about beverages which might substitute tea.

Data about frequency of tea consumption and groups of the most intensive consumers are given.

Characteristic features of tea consumption in Russia are considered. Then follow data about consumers' preferences of kinds of tea (black, green, aromatized, herbal) and types of tea (large-leaf, fine-leaf, in bags and granular). The growth rate of tea in bags is considered for the period 2003-2005.

Situations where people drink tea are shown and considered in detail (at home, at work, tea as a present). Data for preferences by tea types in each of these situations are given.

The subject of more detailed consideration is consumption of tea at work. Data about favorite beverages at work, which tea types are preferred in this situation, how often people drink tea at work and finally, which trademarks are preferred, are given.

Further the Russian tea market capacity and tea import structure are considered. Some points of tea market growth are detected. The market structure is considered by tea kinds, with dynamics of

development of each market segment in the period 2003-2005.

Information about structure of the aromatized tea segment by preferred flavors is represented.

The competitive environment in the tea market is analyzed, including market shares of the key manufacturers and features of competition between domestic and foreign tea companies.

Further buyers` behavior in the tea market is analyzed: how often they buy tea, how much packing are in one purchase, the preferred packing volume, where they prefer to make purchases and their motivation by choice of a tea trademark.

Separately tea markets of Moscow and St.-Petersburg are considered. In this consideration capacity of the tea markets in Moscow and in St.-Petersburg, consumption rate by Moscow and St.-Petersburg citizens in comparison with large Russian cities on the whole, purchasing rate by Moscow and St.-Petersburg citizens, preferences of Moscow and St.-Petersburg citizens by kinds and types of tea in comparison with other large Russian cities, preferred types and volumes of packing by tea in bags and at last favorite trademarks of Moscow and St.-Petersburg citizens are covered.

Finally profiles of the major tea manufacturers in the Russian market are described, in particular, of companies Orimi Trade, May, Unilever and Ahmad. The history of their achievements in the Russian market, characteristic features of perception of their trademarks by consumers and market shares in the tea market generally and in single market segments.

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