Russia Business Forum 2018

Opportunità per l’export italiano: analisi dello scenario economico e dei trend di crescita dei consumi per il quinquennio 2016-2021

Torino, 19 febbraio 2018
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1. Global briefing (World - Russia - Italy)
1.1 Category definitions

**Packaged Food**: aggregation of baked goods, breakfast cereals, edible oils, processed fruit and vegetables, processed meat and seafood, ready meals, rice, pasta and noodles, sauces, dressings and condiments, soup, spreads, baby food, chocolate confectionery, sugar confectionery and gum, dairy products (butter and margarine, cheese, drinking milk products, yoghurt and sour milk products, chilled and shelf stable desserts, chilled snacks, coffee whiteners, condensed/evaporated milk, cream, and fromage frais and quark), ice cream and frozen desserts, savoury snacks, sweet biscuits, snack bars and fruit snacks. In packaged food we consider two aspects of food sales: 1) Retail sales; 2) Foodservice.

**Alcoholic Drinks**: aggregation of beer, cider/perry, wine, fortified wine, liquors and spirits.

**Soft Drinks**: aggregation of carbonates, fruit/vegetable juice, bottled water, functional drinks, concentrates, RTD tea, RTD coffee and speciality drinks.

**Hot Drinks**: aggregation of coffee, tea, and other hot drinks.

**Home & Garden**: focus on sales to consumers only. Aggregation of outdoor furniture, home furnishings, home improvement products, homewares.

**Apparel & Footwear**: aggregation of clothing and footwear.

**Beauty & Personal Care**: aggregation of baby and child-specific products, bath & shower, deodorants, hair care, colour cosmetics, men's grooming, oral hygiene, fragrances, skin care, depilatories, sun care and sets/kits.
1.2 Packaged Food
2017, valore complessivo, mln €

Packaged Food
Market Size
Retail Value RSP, EUR million, Current 2017, YOY 2016 by Estas, 2017

Global Figure
2017, EUR million
1.968.733,7

Regional Comparison
2017, EUR million
Asia Pacific
Australia
Eastern Europe
Latin America
Middle East and Africa
North America
Western Europe

Russia Explore in Detail
Market Size
2017, EUR million
73.197,7
Per Capita
2017, EUR
506,85
Forecast Growth
2017-2022 CAGR
0,7%

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Elaborazione Camera di commercio di Torino su dati Euromonitor International
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1.3 Alcoholic Drinks
2016, valore complessivo, mln Lt.

Alcoholic Drinks
Market Size
Total Volume, million litres, 2016

Global Figure
2016, million litres
249,536,1

Regional Comparison
2016, million litres
- Asia Pacific
- Australasia
- Eastern Europe
- Latin America
- Middle East and Africa
- North America
- Western Europe

Russia
Market Size
2016, million litres
9,974,6

Per Capita
2016, litres
69,16

Forecast Growth
2016-2021 CAGR
-1.6%

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Torino, 19 febbraio 2018
1.4 Soft Drinks
2017, valore complessivo, mln Lt.

Soft Drinks
Market Size
Off-trade Volume, million litres, 2017

Global Figure
2017, million litres
600,935,5

Regional Comparison
2017, million litres
Asia Pacific
Australia
Eastern Europe
Latin America
Middle East and Africa
North America
Western Europe

Russia
Explore in Detail
Market Size
2017, million litres
11,903,7

Per Capita
2017, litres
82,43

Forecast Growth
2017-2022 CAGR
1,7%

Italy
13,046,4
600,935,5

World
1.5 Hot Drinks
2017, valore complessivo, mln Lt.

Hot Drinks
Market Size
Retail Value RSP, EUR million, Current 2017, YOY 2016 by Estas, 2017

Global Figure
2017, EUR million
133.764,2

Regional Comparison
2017, EUR million
Asia Pacific
Australia
Eastern Europe
Latin America
Middle East and Africa
North America
Western Europe

Russia Explore in Detail
Market Size
2017, EUR million
6.134,7

Per Capita
2017, EUR
42,48

Forecast Growth
2017-2022 CAGR
0,5%

Italy
2.509,7
133.764,2

World
42,86
17,90
2,8%
3,0%

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Torino, 19 febbraio 2018
1.6 Home & Garden
2016, valore complessivo, mln €

Home and Garden
Market Size

Global Figure
2016, EUR million
874,508,0

Regional Comparison
2016, EUR million
Asia Pacific
Australia
Eastern Europe
Latin America
Middle East and Africa
North America
Western Europe

Explore in Detail
Russia
Market Size
2016, EUR million
15,433,9

Per Capita
2016, EUR
113,9

Forecast Growth
2016-2021 CAGR
-0.8%

Italy
World
20,363,4
874,508,0
335,67
118,40
-1.0%
7.0%
1.7 Apparel & Footwear
2017, valore complessivo, mln €

Apparel and Footwear
Market Size
Retail Value RSP, EUR million, Current 2017, YoY 2016 by Regions, 2017

Global Figure
2017, EUR million
1.506.883,5

Regional Comparison
2017, EUR million
Asia Pacific
Australia
Eastern Europe
Latin America
Middle East and Africa
North America
Western Europe

Russia
Explore in Detail
Market Size
2017, EUR million
43.888,5

Per Capita
2017, EUR
303,9

Forecast Growth
2017-2022 CAGR
1.8%

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Russia Business Forum 2018
Torino, 19 febbraio 2018
1.8 Beauty & Personal Care
2016, valore complessivo, mln €

Global Figure
2016, EUR million

401,436,0

Regional Comparison
2016, EUR million

Asia Pacific
Australia
Eastern Europe
Latin America
Middle East and Africa
North America
Western Europe

Russia Explore in Detail

Market Size
2016, EUR million

8,262,5

Per Capita
2016, EUR

57,29

Forecast Growth
2016-2021 CAGR

1,8%

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Elaborazione Camera di commercio di Torino su dati Euromonitor International

Russia Business Forum 2018
Torino, 19 febbraio 2018
2. Analisi del mercato russo
2.1 Country Outlook
2017

<table>
<thead>
<tr>
<th>N. Città</th>
<th>mln. ab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Moscow</td>
<td>12,23</td>
</tr>
<tr>
<td>2 Saint Petersburg</td>
<td>5,28</td>
</tr>
<tr>
<td>3 Novosibirsk</td>
<td>1,60</td>
</tr>
<tr>
<td>4 Yekaterinburg</td>
<td>1,45</td>
</tr>
<tr>
<td>5 Nizhny Novgorod</td>
<td>1,26</td>
</tr>
<tr>
<td>6 Kazan</td>
<td>1,23</td>
</tr>
<tr>
<td>7 Chelyabinsk</td>
<td>1,98</td>
</tr>
<tr>
<td>8 Omsk</td>
<td>1,18</td>
</tr>
<tr>
<td>9 Samara</td>
<td>1,16</td>
</tr>
<tr>
<td>10 Rostov-on-Don</td>
<td>1,12</td>
</tr>
<tr>
<td>11 Ufa</td>
<td>1,11</td>
</tr>
<tr>
<td>12 Krasnoyarsk</td>
<td>1,08</td>
</tr>
<tr>
<td>13 Perm</td>
<td>1,05</td>
</tr>
<tr>
<td>14 Voronezh</td>
<td>1,04</td>
</tr>
<tr>
<td>15 Volgograd</td>
<td>1,01</td>
</tr>
</tbody>
</table>

9 fusi orari
+80 gruppi etnici
12° economia mondiale (PIL)
1/8 della superficie terrestre
144 mln abitanti
9.000 km

Elaborazione Camera di commerco di Torino su dati World Bank Group, SACE

Russia Business Forum 2018
Torino, 19 febbraio 2018
2.2 Market Outlook: Packaged Food
2017, quick stats & sales

Quick Stats and Links
Selected geography's actual rank vs other geographies

- **Market Size**
  - 2017: €73,197,7
- **Per Capita**
  - 2017: €506,85
- **Forecast Growth**
  - 2017-2022: 0.7%

Category YOY Growth Comparison

Sales of Packaged Food in Russia
Retail Value RSP - RUB million - Current - 2003-2022

- **2017**: 4,956,054
- **Forecast**: Growth

Top 3 Companies
Retail Value RSP, % breakdown

- **Danone, Groupe**: 5
- **PepsiCo Inc**: 4.8
- **Obninskaya Konditeriya UK OOO**: 2.9
- **Others**: 42.2

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2.2 Market Outlook: Packaged Food

2017, sales by category

Sales of Packaged Food in Russia by Category
Retail Value RSP - RUB million - Current - 2017

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales 2017 (RUB million)</th>
<th>Growth Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Food</td>
<td>269,554,4</td>
<td></td>
</tr>
<tr>
<td>Baked Goods</td>
<td>406,119,7</td>
<td></td>
</tr>
<tr>
<td>Breakfast Cereals</td>
<td>33,718,8</td>
<td></td>
</tr>
<tr>
<td>Confectionery</td>
<td>702,870,9</td>
<td></td>
</tr>
<tr>
<td>Dairy</td>
<td>1,274,466,6</td>
<td></td>
</tr>
<tr>
<td>Edible Oils</td>
<td>165,737,4</td>
<td></td>
</tr>
<tr>
<td>Ice Cream and Frozen Desserts</td>
<td>158,060,6</td>
<td></td>
</tr>
<tr>
<td>Processed Fruit and Vegetables</td>
<td>185,983,1</td>
<td></td>
</tr>
<tr>
<td>Processed Meat and Seafood</td>
<td>654,363,5</td>
<td></td>
</tr>
</tbody>
</table>

Ready Meals: 187,281,2
Rice, Pasta and Noodles: 139,540,8
Sauces, Dressings and Condiments: 266,947,4
Savoury Snacks: 279,765,4
Soup: 13,814,2
Spreads: 34,831,9
Sweet Biscuits, Snack Bars and F...: 182,997,9

PACKAGED FOOD: 4,956,053,8

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2.2 Market Outlook: Packaged Food
2017, distribution channels

Channel Distribution for Packaged Food in Russia
% Breakdown 2017 and Point Growth Trend - 2012-2017

- 96.7% Grocery Retailers
  - 99.3% Store-Based Retailing
  - 0.7% Non-Store Retailing
  - 0.1% Vending
- 2.5% Non-Grocery Specialists
- 28.1% Traditional Grocery Retailers
  - 16.2% Convenience Stores
  - 13% Hypermarkets
  - 39.1% Supermarkets
  - 0.2% Forecourt Retailers
- 4.3% Other Grocery Retailers
  - 1.1% Food/drink/tobacco specialists
- 1.3% Health and Beauty Specialist Retailers
- 1.2% Other Foods Non-Grocery Specialists

△ Increasing  ▼ Decreasing  — No change
2.3 Market Outlook: Alcoholic Drinks

2017, quick stats & sales

Quick Stats and Links
Selected geography's actual rank vs other geographies

- Market Size 2016, million litres: 9,974,6
- Per Capita 2016, litres: 69,16
- Forecast Growth 2016-2021 Case: -1,6%

Category YOY Growth Comparison
million litres, 2011-2021

Sales of Alcoholic Drinks in Russia
Total Volume - million litres - 2002-2021

9,975

Top 3 Companies
Total Volume, % breakdown

- Carlsberg A/S: 24,6
- Anheuser-Busch InBev NV: 9,1
- Heineken NV: 8,6
- Others: 32,3

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2.3 Market Outlook: Alcoholic Drinks

2017, sales by category

Sales of Alcoholic Drinks in Russia by Category

Total Volume - '000 litres - 2016

Click on a Category to update Sales Chart

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Volume (000 litres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer</td>
<td>7,688,500,0</td>
</tr>
<tr>
<td>Cider/Perry</td>
<td>43,284,8</td>
</tr>
<tr>
<td>RTDs/High-Strength Premixes</td>
<td>118,451,2</td>
</tr>
<tr>
<td>Spirits</td>
<td>1,220,276,8</td>
</tr>
<tr>
<td>Wine</td>
<td>904,100,0</td>
</tr>
<tr>
<td><strong>ALCOHOLIC DRINKS</strong></td>
<td><strong>9,974,612,8</strong></td>
</tr>
</tbody>
</table>

Growth Performance

-20% 0% 50%

CURRENT YEAR % GROWTH

% CAGR 2011-2016

% CAGR 2016-2021

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2.3 Market Outlook: Alcoholic Drinks
2017, distribution channels

Channel Distribution for Alcoholic Drinks in Russia
% Breakdown 2016 and Point Growth Trend - 2011-2016

100% — Store-Based Retailing
100% — Grocery Retailers
35.1% — Small Grocery Retailers
26.1% — Supermarkets
10.8% — Hypermarkets
5.4% — Convenience Stores
29.7% — Independent Small Grocers
18% — Other Grocery Retailers
9.9% — Food/drink/tobacco specialists
0% — Non-Store Retailing
0% — Internet Retailing

▲ Increasing  ▼ Decreasing  — No change

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2.4 Market Outlook: Home & Garden
2017, quick stats & sales

Quick Stats and Links
Selected geography's actual rank vs other geographies

Market Size
2016, RUB million
16,433,9

Per Capita
2016, RUB
113,95

Forecast Growth
2016-2021 CAGR
-0.8%

Category YOY Growth Comparison
Retail Value RSP - RUB million - Current - 2002-2021

Sales of Home and Garden in Russia
Retail Value RSP - RUB million - Current - 2002-2021

Top 3 Companies
Retail Value RSP, % breakdown

Inter IKEA Systems BV
6.5

Stokke-Rus OOO
1.3

Arc International, Groupa
1.2

Others
72.2
2.4 Market Outlook: Home & Garden

2017, sales by category

Sales of Home and Garden in Russia by Category
Retail Value RSP - RUB million - Current - 2016

Growth Performance

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales (RUB million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gardening</td>
<td>80.400,1</td>
</tr>
<tr>
<td>Home Furnishings</td>
<td>680.920,0</td>
</tr>
<tr>
<td>Home Improvement</td>
<td>338.309,9</td>
</tr>
<tr>
<td>Homewares</td>
<td>120.787,1</td>
</tr>
</tbody>
</table>

| HOME AND GARDEN     | 1.220.417,0         |

Passport © Euromonitor International 2018
2.4 Market Outlook: Home & Garden
2017, distribution channels

Channel Distribution for Home and Garden in Russia
% Breakdown 2016 and Point Growth Trend - 2011-2016

- 88.8% Store-Based Retailing
  - 5.9% Grocery Retailers
  - 3% Supermarkets
  - 2.8% Hypermarkets
  - 83% Non-Grocery Specialists
    - 74.7% Home and Garden Specialist Retailers
      - 8.2% Other Non-Grocery Specialists
    - 0.5% Direct Selling
    - 9.2% Internet Retailing
    - 1.5% Homeshopping
  - 11.2% Non-Store Retailing
  - 30.6% Homewares and Home Furnishing Stores
  - 44.1% Home Improvement and Gardening Stores

▲ Increasing  ▼ Decreasing  — No change

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2.5 Formalità doganali
Fonti informative essenziali

Requisiti generali:

- L’ABC dell’import-export

Requisiti specifici:

- Market Access Database

Sanzioni e contro-sanzioni:

- Speciale sanzioni (CCIR / ICE-Agenzia)
2.6 Contatti utili
Rappresentanze istituzionali e riferimenti utili

Contatti utili nella Federazione Russa:
- Ambasciata italiana a Mosca
- Ufficio ICE-Agenzia di Mosca
- Chamber of Commerce and Industry of the Russian Federation

Contatti utili in Italia:
- Ambasciata della Federazione Russa in Italia
- Rappresentanza Commerciale della Federazione Russa in Italia
- Camera di Commercio Italo-Russa

Link utili:
- Viaggiare Sicuri (Ministero degli Affari Esteri e della Cooperazione Internazionale)
- Invest in Russia
- Russian Companies Directory
- Russia Tourism
3. Comunicare con il consumatore russo nell’era digitale
### MOST COMMON LANGUAGES FOR WEB CONTENT

*W3TECHS ESTIMATES, BASED ON THE CONTENT OF THE WORLD’S TOP 10 MILLION WEBSITES*

<table>
<thead>
<tr>
<th>#</th>
<th>LANGUAGE</th>
<th>% WEBSITES</th>
<th>▲▼% Y-O-Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>ENGLISH (ALL)</td>
<td>51.2%</td>
<td>-2.1%</td>
</tr>
<tr>
<td>02</td>
<td>RUSSIAN</td>
<td>6.8%</td>
<td>+6.3%</td>
</tr>
<tr>
<td>03</td>
<td>GERMAN</td>
<td>5.6%</td>
<td>+3.7%</td>
</tr>
<tr>
<td>04</td>
<td>JAPANESE</td>
<td>5.5%</td>
<td>-3.5%</td>
</tr>
<tr>
<td>05</td>
<td>SPANISH (ALL)</td>
<td>5.1%</td>
<td>+2.0%</td>
</tr>
<tr>
<td>06</td>
<td>FRENCH</td>
<td>4.1%</td>
<td>+2.5%</td>
</tr>
<tr>
<td>07</td>
<td>PORTUGUESE (ALL)</td>
<td>2.6%</td>
<td>-</td>
</tr>
<tr>
<td>08</td>
<td>ITALIAN</td>
<td>2.4%</td>
<td>+4.3%</td>
</tr>
<tr>
<td>09</td>
<td>CHINESE (ALL)</td>
<td>2.1%</td>
<td>+5.0%</td>
</tr>
<tr>
<td>10</td>
<td>POLISH</td>
<td>1.7%</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#</th>
<th>LANGUAGE</th>
<th>% WEBSITES</th>
<th>▲▼% Y-O-Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>PERSIAN</td>
<td>1.7%</td>
<td>+13.3%</td>
</tr>
<tr>
<td>12</td>
<td>TURKISH</td>
<td>1.4%</td>
<td>-12.5%</td>
</tr>
<tr>
<td>13</td>
<td>DUTCH / FLEMISH</td>
<td>1.3%</td>
<td>-7.1%</td>
</tr>
<tr>
<td>14</td>
<td>KOREAN</td>
<td>1.0%</td>
<td>+11.1%</td>
</tr>
<tr>
<td>15</td>
<td>CZECH</td>
<td>0.9%</td>
<td>+12.5%</td>
</tr>
<tr>
<td>16</td>
<td>ARABIC</td>
<td>0.7%</td>
<td>-12.5%</td>
</tr>
<tr>
<td>17</td>
<td>VIETNAMESE</td>
<td>0.6%</td>
<td>-</td>
</tr>
<tr>
<td>18</td>
<td>GREEK</td>
<td>0.5%</td>
<td>-</td>
</tr>
<tr>
<td>19</td>
<td>SWEDISH</td>
<td>0.5%</td>
<td>-</td>
</tr>
<tr>
<td>20</td>
<td>HUNGARIAN</td>
<td>0.5%</td>
<td>+25.0%</td>
</tr>
</tbody>
</table>

*Sources: W3TECHS, January 2018, including web traffic ranking data from Alexa. Language names as per W3TECHS’s definitions.*
3.2 Quanto è connessa la Russia
WeAreSocial, Digital in Eastern Europe 2018 Report, In-depth country profiles

**JAN 2018**

**DIGITAL IN THE RUSSIAN FEDERATION**
A snapshot of the country’s key digital statistical indicators

- **Total Population**: 144.0 million
- **Internet Users**: 110.0 million
- **Active Social Media Users**: 67.8 million
- **Unique Mobile Users**: 114.2 million
- **Active Mobile Social Users**: 55.9 million

**Urbanisation**: 74%
**Penetration**: 76%
**Penetration**: 47%
**Penetration**: 79%
**Penetration**: 39%

Note: Penetration figures are for total population (all ages).*
3.3 Le principali piattaforme utilizzate in Russia

*WeAreSocial, Digital in Eastern Europe 2018 Report, In-depth country profiles*

<table>
<thead>
<tr>
<th>Platform</th>
<th>Social Network</th>
<th>Messenger / Chat App / VoIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>VK</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>WhatsApp</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Skype</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Facebook</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Viber</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Instagram</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Google+</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Twitter</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>FB Messenger</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Twitch</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

**Source:** GlobalWebIndex, 05.03.2017. Based on a survey of internet users aged 16+. Notes: Data for platforms with an asterisk (*) is collected in a different part of the survey to other platform data. All data has been released to show total national penetration, regardless of age. Advisory: figures are based on responses to a survey, and may not correlate to social media penetration figures shown elsewhere in this report. For full details, see the notes at the end of this report.

Fonte: WeAreSocial / Hootsuite (www.wearesocial.sg)
### 3.4 Facebook vs Instagram

*WeAreSocial, Digital in 2018 Report*

<table>
<thead>
<tr>
<th></th>
<th>Italy</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ranking among Social Media platforms</strong></td>
<td>2°</td>
<td>6°</td>
</tr>
<tr>
<td><strong>Users active on the platform</strong></td>
<td>60 %</td>
<td>35 %</td>
</tr>
<tr>
<td><strong>Total number of monthly active users</strong></td>
<td>34 mln</td>
<td>36 mln</td>
</tr>
<tr>
<td><strong>Percentage of users accessing via mobile</strong></td>
<td>88 %</td>
<td>39 %</td>
</tr>
<tr>
<td><strong>Female users</strong></td>
<td>48 %</td>
<td>56 %</td>
</tr>
<tr>
<td><strong>Male users</strong></td>
<td>52 %</td>
<td>44 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Italy</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ranking among Social Media platforms</strong></td>
<td>5°</td>
<td>8°</td>
</tr>
<tr>
<td><strong>Users active on the platform</strong></td>
<td>33 %</td>
<td>31 %</td>
</tr>
<tr>
<td><strong>Total number of monthly active users</strong></td>
<td>16 mln</td>
<td>29 mln</td>
</tr>
<tr>
<td><strong>Percentage of users accessing via mobile</strong></td>
<td>27 %</td>
<td>20 %</td>
</tr>
<tr>
<td><strong>Female users</strong></td>
<td>51 %</td>
<td>51 %</td>
</tr>
<tr>
<td><strong>Male users</strong></td>
<td>49 %</td>
<td>49 %</td>
</tr>
</tbody>
</table>
3.5 L’e-commerce in Russia

WeAreSocial, Digital in Eastern Europe 2018 Report, In-depth country profiles

**E-COMMERCE SPEND BY CATEGORY**

**TOTAL ANNUAL AMOUNT SPENT ON CONSUMER E-COMMERCE CATEGORIES, IN UNITED STATES DOLLARS**

- **Fashion & Beauty**: $4.783 billion
- **Electronics & Physical Media**: $3.665 billion
- **Food & Personal Care**: $1.349 billion
- **Furniture & Appliances**: $2.071 billion
- **Toys, DIY & Hobbies**: $4.175 billion
- **Travel (including Accommodation)**: $7.903 billion
- **Digital Music**: $0.030 billion
- **Video Games**: $0.713 billion

*Sources: Statista Digital Market Outlook, E-commerce Industry, Travel Industry, and Digital Media Industry, all accessed January 2018. Note: figures are based on estimates of full year consumer spend in 2017, and do not include B2B spend.*
4. Fonti

Euromonitor International (Passport)  
www.euromonitor.com/passport

EU Commission (Market Access Database)  
www.madb.europa.eu

World Bank Group (World Databank)  
www.databank.worldbank.org

SACE (Country & Risk Map)  
www.sace.it

Disclaimer: La realizzazione di questo documento è stata ispirata dalla necessità di poter raccogliere e analizzare informazioni utili a orientare le imprese sui mercati internazionali. Data la sensibilità e la complessità degli argomenti trattati, si ritiene opportuno segnalare che le informazioni contenute in questo studio sono tratte da fonti ritenute attendibili ed aggiornate alla data di pubblicazione. Tuttavia, essendo soggette a possibili modifiche ed integrazioni periodiche da parte delle fonti citate, si sottolinea che le stesse non hanno carattere di ufficialità, bensì valore meramente orientativo. Pertanto, il loro utilizzo da parte del lettore nell’espletamento della propria attività professionale richiede una puntuale verifica presso i soggetti competenti nelle materie cui le informazioni ineriscono.

Hootsuite / We Are Social (Digital In 2018)  
www.wearesocial.sg

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5. Contatti

Sportello Russia

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