

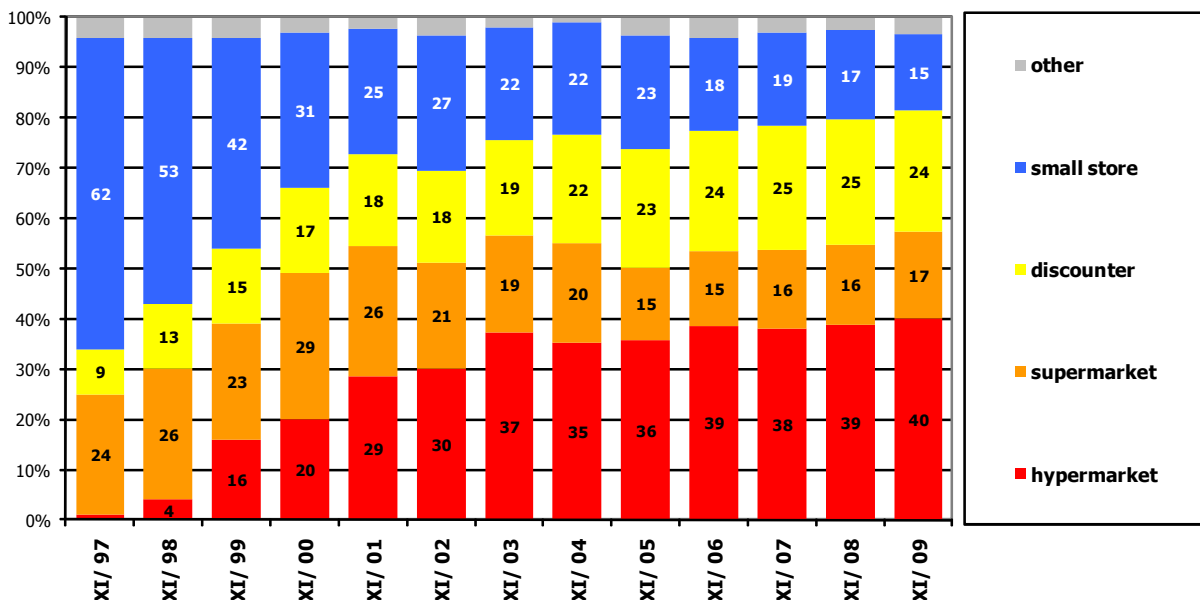
Where do customers of Central and Eastern Europe spend money on groceries

Press release of INCOMA GfK

on results of the project „SHOPPING MONITOR Czech Republic 2010“
and „SHOPPING MONITOR Central & Eastern Europe 2010“

According to the Shopping Monitor study conducted by INCOMA GfK no significant change in the positioning of shopping formats was reported in the Czech market in 2009 in spite of the economic recession. Hypermarkets and supermarkets have shown slight year-to-year share increase while the position of discount shops has remained the same as the last year and smaller (namely wide-assortment) grocery stores reported further slight decline.

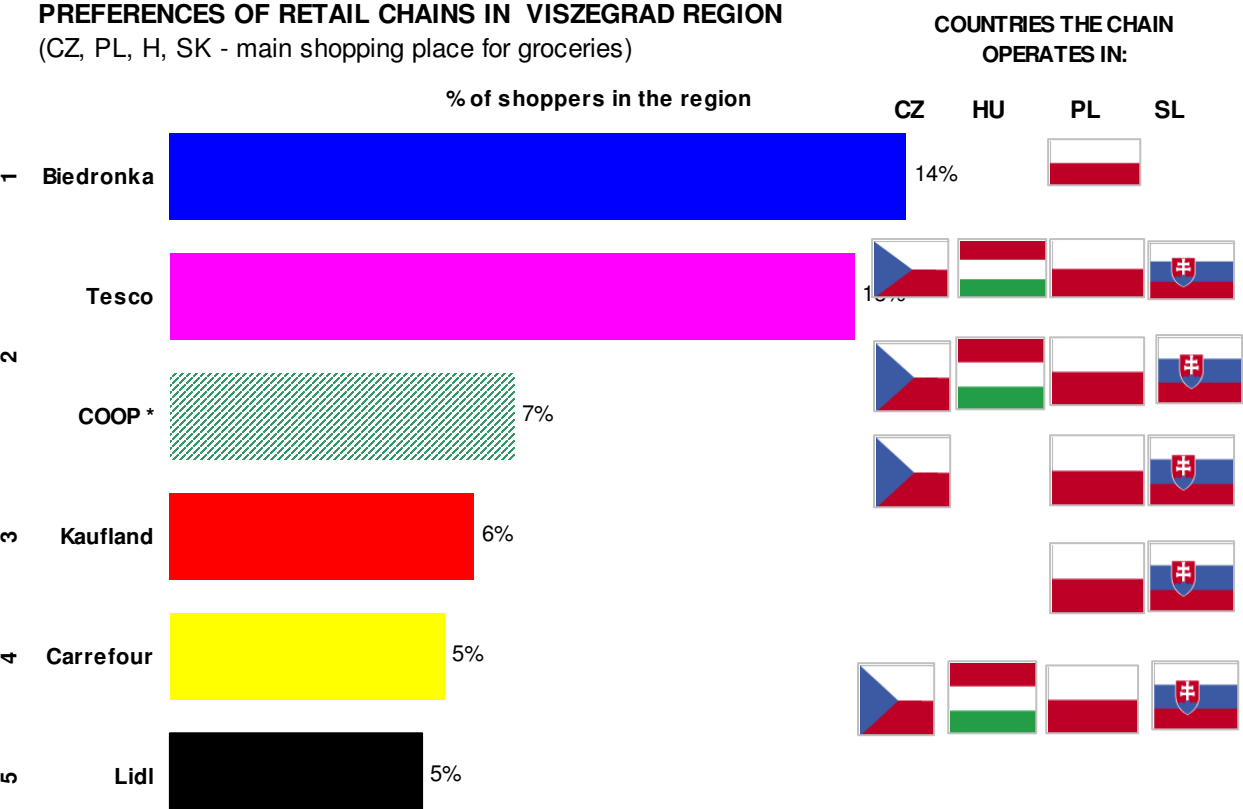
MAIN SHOPPING PLACE FOR GROCERIES (development)



Technical parameters of the survey SHOPPING MONITOR CEE 2010:

Authors INCOMA + GfK national offices, representative national survey done in November 2009, personal interviews in households/CATI/CAPI, respondent is the person who does the most shopping in the household; representative sample in each of the countries.

In the Czech Republic, the highest share of loyal customers has been currently reported with hypermarket chains (40 %) followed by discount shops (24 %), supermarkets (17 %) and smaller shops (15 %). No customer shift among formats or among chains has been reported – in spite of some changes in the shopping behaviour. The stability of play of forces also corresponds to the not very significant retail stores expansion – number of supermarkets has not changed almost and number of discount shops only reported a slight increase. However, the presence of hypermarkets has become stronger.



The **SHOPPING MONITOR CEE 2010** (INCOMA GfK) has revealed that Biedronka, the Polish discount shop chain, a member of the Portuguese Jeronimo Martins group, is the most favourite retail chain in the Viszegrad region (the Czech Republic, Slovakia, Poland and Hungary). 14 % of buyers, which correspond to 9.1 million customers, (either direct or other family members) said Biedronka was their main shopping place for the fast moving goods.

Technical parameters of the survey SHOPPING MONITOR CEE 2010:

Authors INCOMA + GfK national offices, representative national survey done in November 2009, personal interviews in households/CATI/CAPI, respondent is the person who does the most shopping in the household; representative sample in each of the countries.

The second position is held by Tesco, which is present in all the countries of the Viszegrad group and was indicated by 13 % buyers as their main shopping place for groceries followed by the third Schwarz Group, Kaufland hypermarkets with 6 % buyers, Lidl discount shops with 5 % and Carrrefour (5 %).

Traditionally, COOP cooperative chain shops have strong position. Although they are not a part of a united retail system comparable to those of multinational chains, they are the main shopping place for 7 % of buyers in the Viszegrad countries.

The annual research of shopping habits and preferences called the Shopping Monitor CEE 2010 is performed in 11 countries of the region of Central and Eastern Europe (Bosnia & Herzegovina, Bulgaria, Czech Republic, Croatia, Hungary, Poland, Romania, Slovakia, Slovenia, Serbia, Ukraine)

For further information you can contact Pavel Cabal or Zdenek Skala, INCOMA Research, contact tel. + 420 251 117 549 or 545, e-mail: cabal@incoma.cz or skala@incoma.cz

Technical parameters of the survey SHOPPING MONITOR CEE 2010:

Authors INCOMA + GfK national offices, representative national survey done in November 2009, personal interviews in households/CATI/CAPI, respondent is the person who does the most shopping in the household; representative sample in each of the countries.