

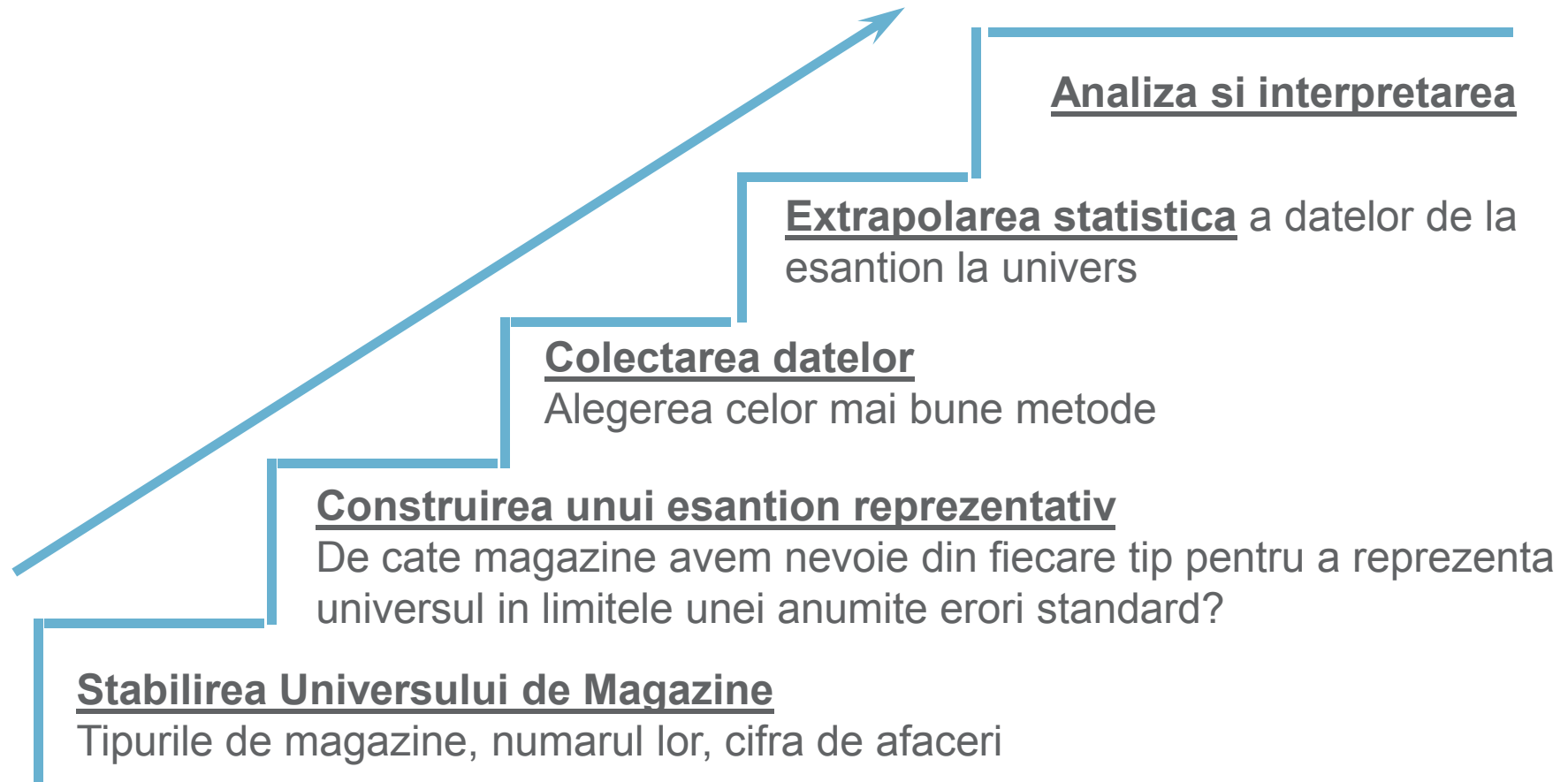
In spatele cotelor de piata

9 septembrie 2008

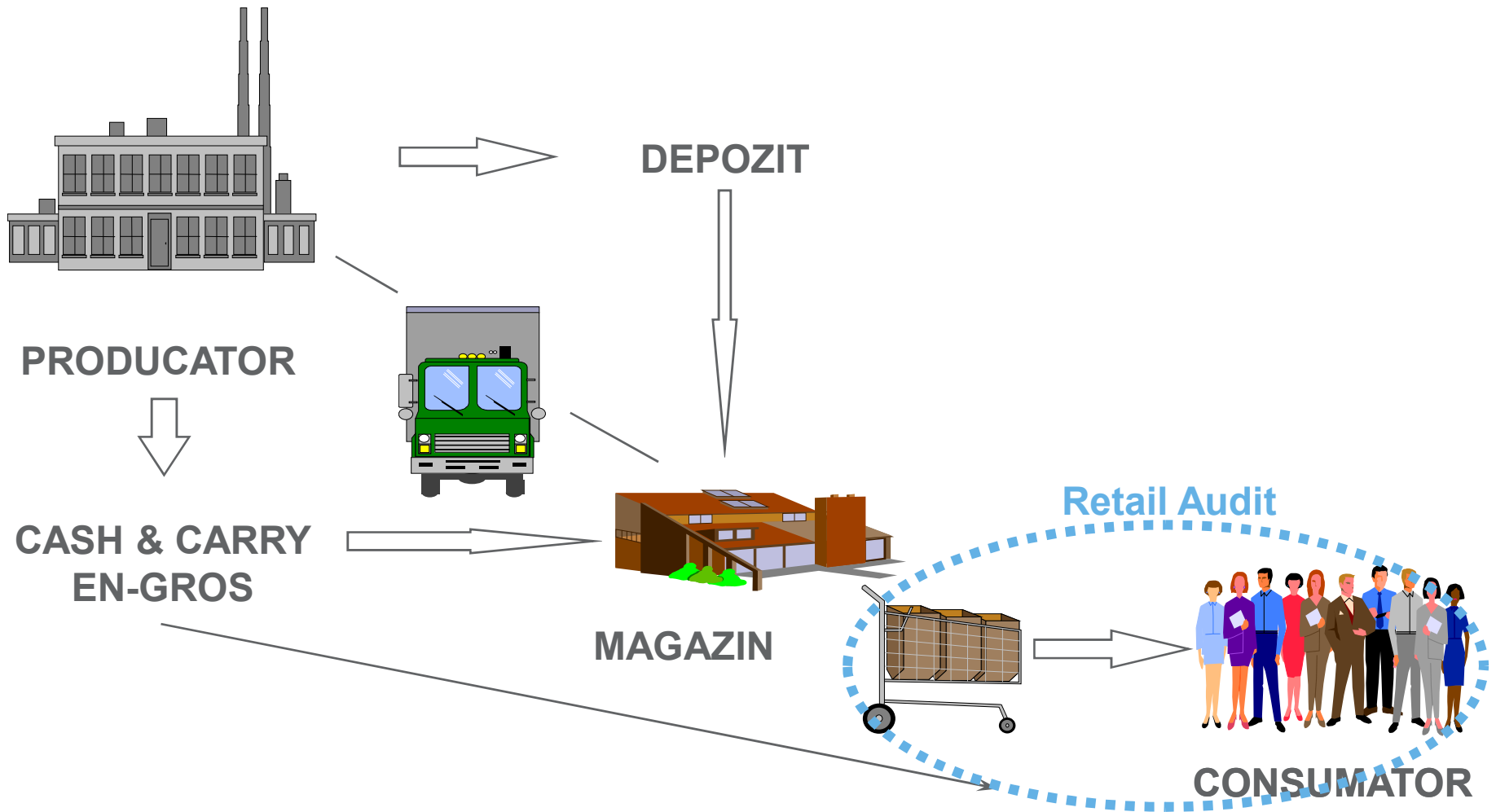


Ciocolata	
Top Producatori Vol % - 2007	
Prodicator A	40%
Prodicator B	20%
Prodicator C	15%
Prodicator D	5%
Prodicator E	5%
Prodicator F	2%
Altii	13%
<i>Sursa: Nielsen</i>	

Cinci pasi pana la cotele de piata – Retail Audit-ul



Fluxul produselor – de la producator la consumator



Doua concepte

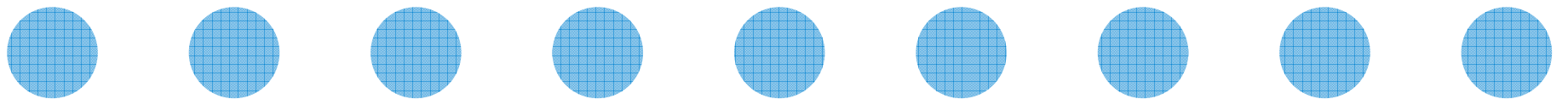
- Eroarea statistica
 - Esantionare / estimare

- Gradul de acoperire
 - Canale de piata acoperite / neacoperite

Probleme si limitari in Retail Audit

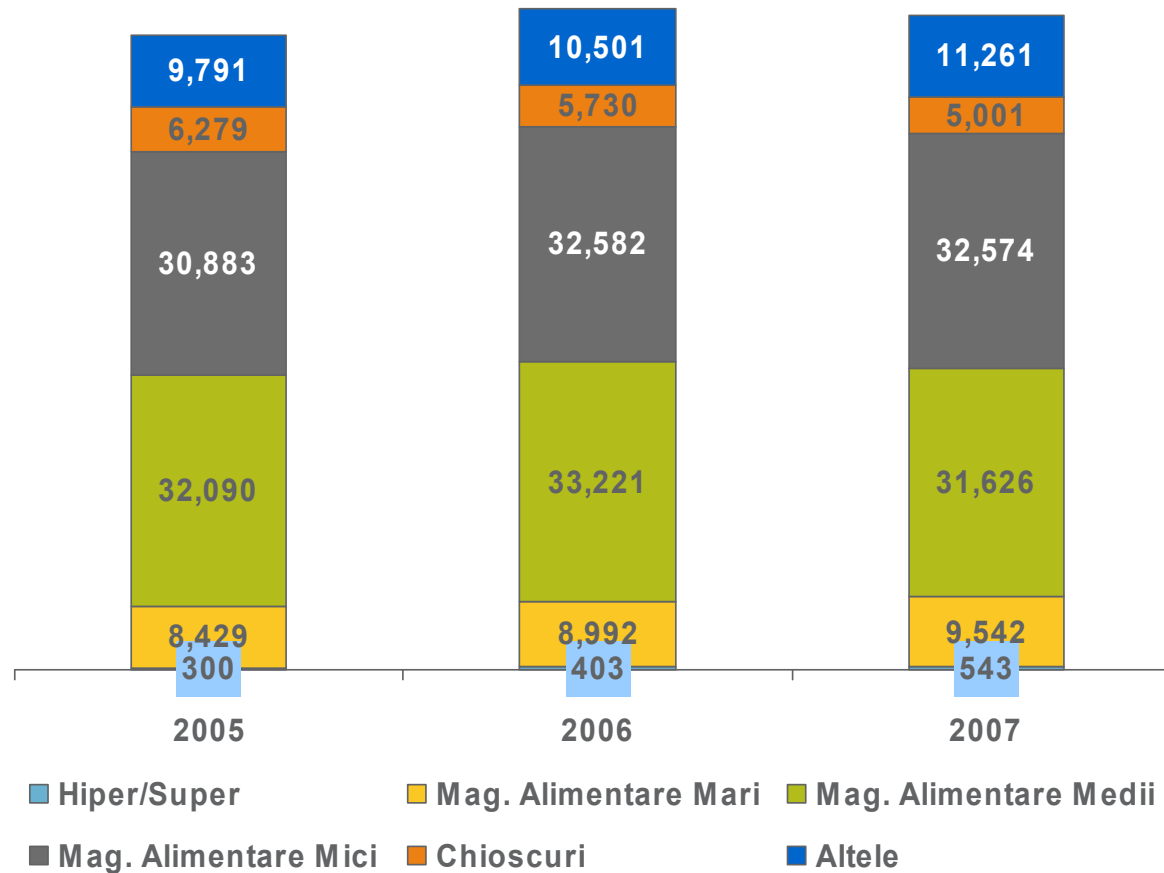
- Lipsa documentelor in colectarea datelor
- Schimbarile rapide in structurile de retail
- Canalele neacoperite in Retail Audit
- Importuri/exporturi paralele
- Produse contrafacute/ilegale
- Vanzarile institutionale
- Vanzarile en-gros din retail
- Inertia retail audit-ului – ciclul de viata

Appendix – Comertul Modern in Romania



Comertul traditional este inca viu si nevatamat

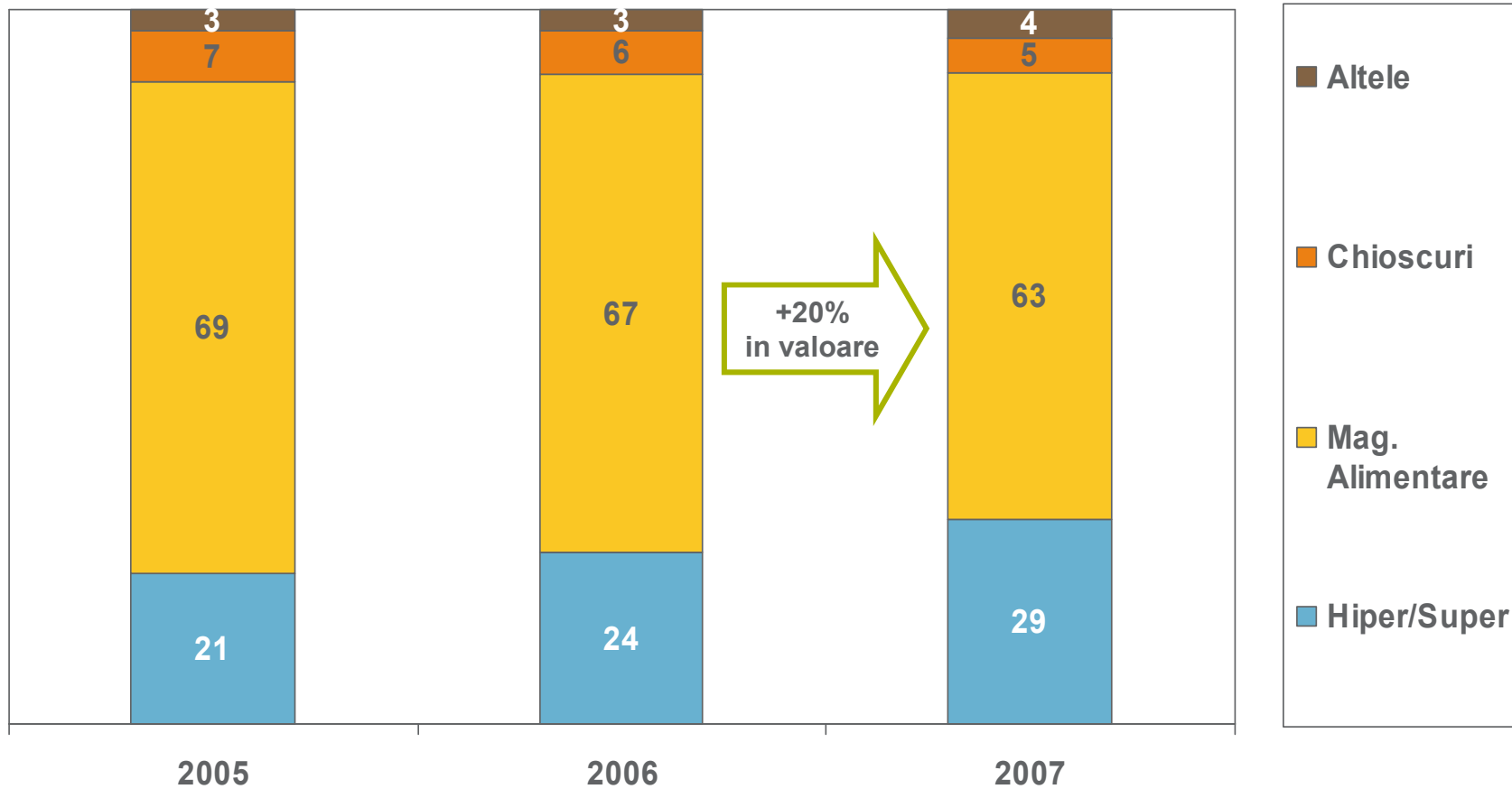
Universul de Magazine Retail



Comertul modern creste ca pondere in vanzari

Traditionalul scade ca pondere, dar a crescut in valoare absoluta

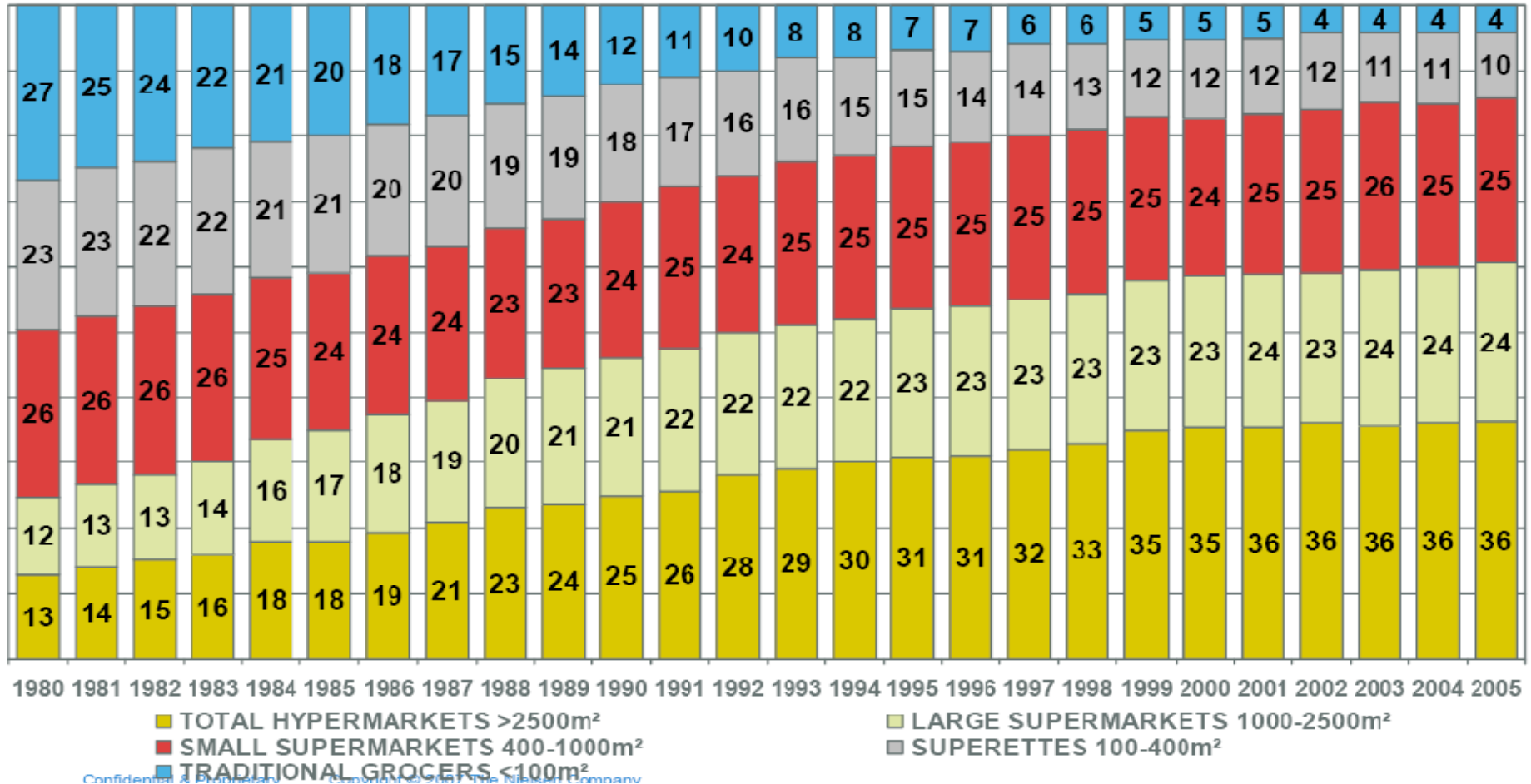
Cota Valorica (%) din Total Retail



In Europa, magazinele mari cresc incet, dar sigur

A fost totusi nevoie de 25 de ani ca sa se ajunga aici!

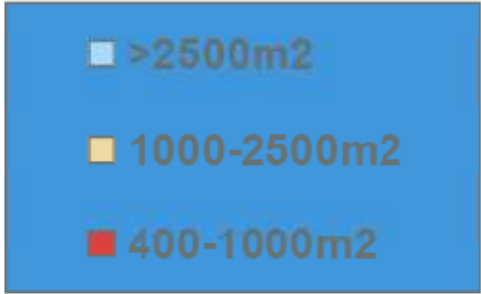
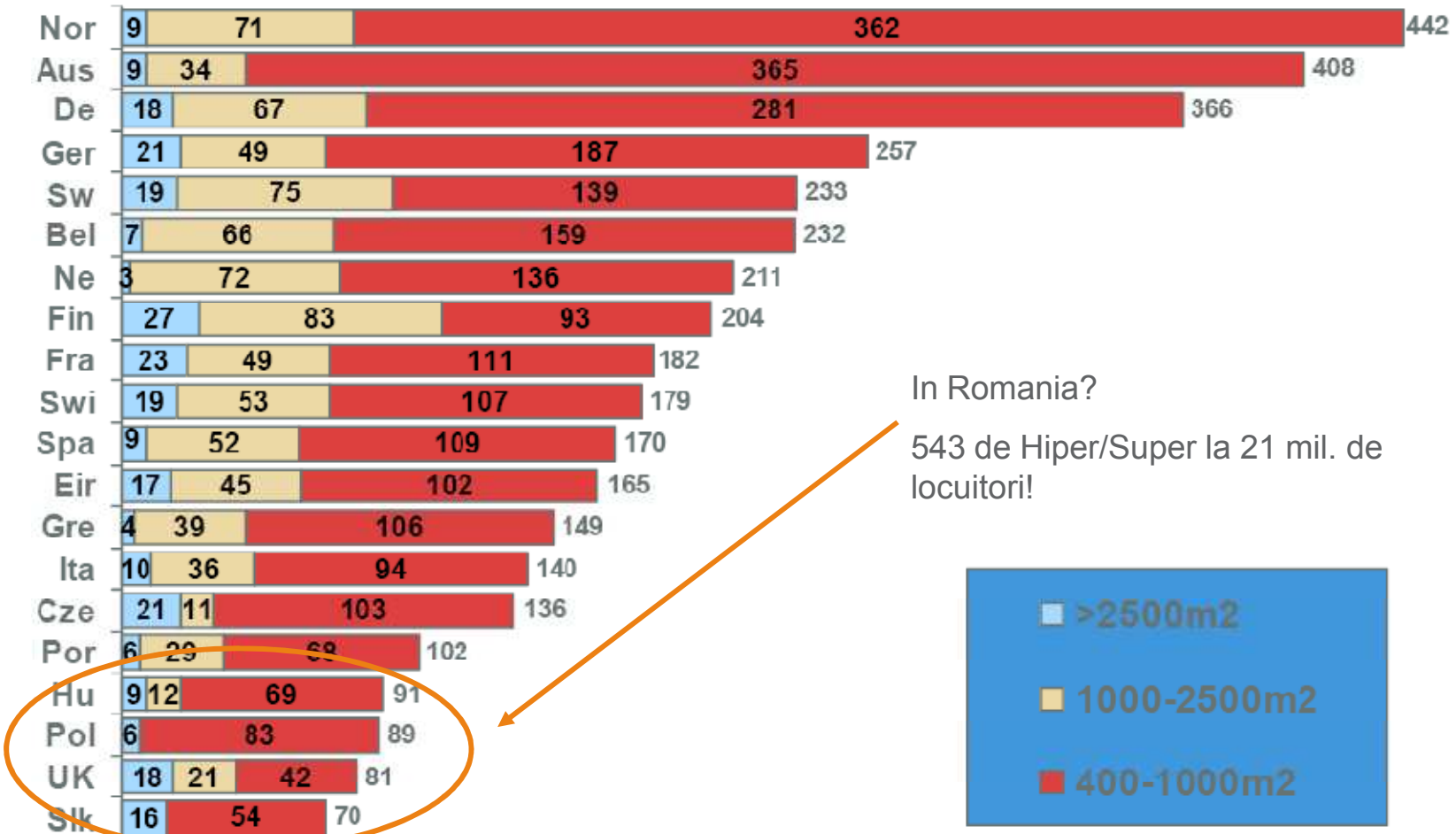
Cota Valorica (%) din Total Retail



Confidential & Proprietary Copyright © 2007 The Nielsen Company

Europa este inca un mozaic de formate si concentrari

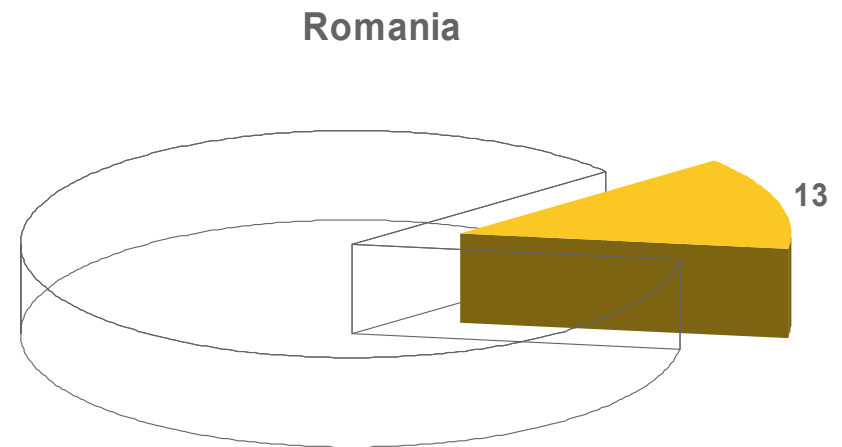
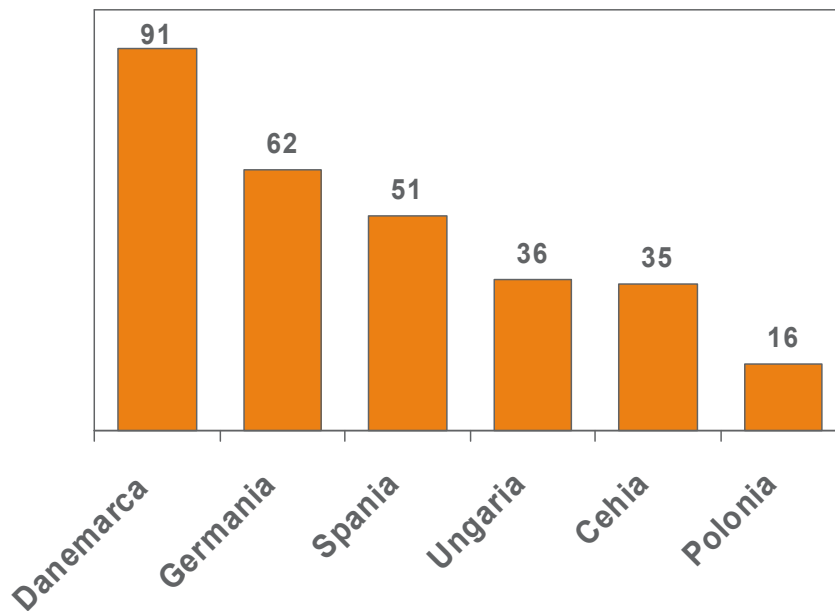
Numarul de Hiper/Super la 1 milion de locuitori



Retailul inca “sufera” de fragmentare pe cele mai multe piete

Pietele producatorilor sunt mult mai concentrate!

Top 3 Retaileri – Cota Valorica (%) din Total Retail



Multumesc!

nielsen
• • • • • • • •

