

GMID паспорт: *Ворота в Мир Глобальной Стратегической Информации*



Павел Милашевич

Киев 2010

План презентации

- **Euromonitor International**
- **«Паспорт GMID»**
Помощь в принятии решений
- **Отрасли, страны, потребители**
Полный пакет информационных услуг
- **Наш подход к исследованиям**
Глубина, последовательность, понимание

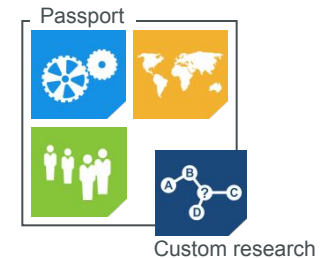


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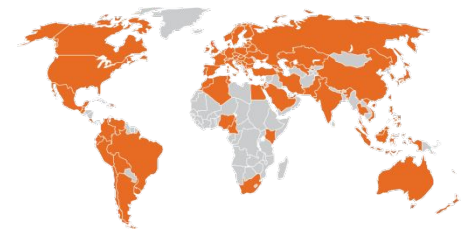
- Источник бизнес - информации, которому доверяют
- Помощь клиентам в принятии обоснованных решений



- Отрасли, страны, потребители
- Подписка и исследования под заказ

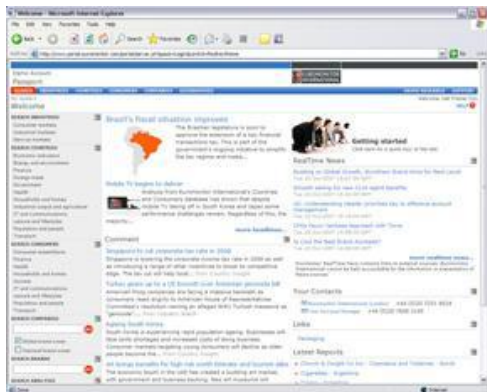


- 600 аналитиков в 80 странах
- Региональные исследовательские центры и поддержка клиентов отраслевыми специалистами



Обзор GMID Паспорта

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 нем?



Industries



Countries



Consumers

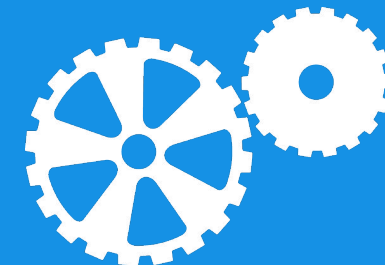
- Статистика, отчеты, комментарии
- 4,000 видов продуктов и услуг
- 8 миллионов единиц данных
- 17,000 полных текстовых отчетов: глобальных, региональных, по странам, по компаниям

„Passport is the Mercedes of business intelligence,,

Content in more detail: Passport GMID

	Industries 	Countries 	Consumer Trends 
Statistics	<p>20,000 рыночные доли индустрий</p> <ul style="list-style-type: none"> • 80 стран (изначально 52) • 1999-2015 • 22 потребительские рынки и рынки услуг <p>200,000 рыночные доли секторов</p> <ul style="list-style-type: none"> • 80 стран (изначально 52) • 1999-2012 • 330 потребительских продуктов 	<p>3 миллиона демографической, экономической и маркетинговой статистической информации</p> <ul style="list-style-type: none"> • 205 страна • 1,650 типов данных • 33 года: 1977-2020 	<p>Более 1 миллиона статистической информации о стиле жизни потребителей</p> <ul style="list-style-type: none"> • 80 стран • 800 типов данных • 25 лет: 1990-2015
Reports	<p>1500 Обзоры потребительских рынков</p> <p>6000 Профили стран</p> <p>8500 Обзоры секторов</p> <p>600 Профили глобальных компаний</p> <p>1600 Обзоры индустриальных рынков</p>	<p>Обзоры индустриальных рынков</p> <p>212 Профили стран, регионов</p> <p>79 Обзоры демографии будущего</p> <p>100 Обзоры стран</p>	<p>Обзоры образа жизни</p> <p>Обзоры стратегий</p>
Sources	<p>Торговые ассоциации</p> <p>Торговые журналы</p> <p>Деловая и финансовая пресса</p>	<p>Национальные бюро статистики</p> <p>Международные организации</p> <p>Национальные и международные торговые и индустриальные организации</p>	<p>Национальные бюро статистики</p> <p>Международные и региональные орг-ции</p>
Comment	<p>Industry Watch – экспертный анализ влияния и последствий последних событий в индустриях</p>	<p>Country Insight – комментарии экономических, политических и правительственных проблем</p>	<p>Global Consumer Trend Monitoring – изучение глобальных потребительских тенденций</p>

Отрасли



Тенденции и факторы, влияющие на рынок

Отслеживание

- Потребительских рынков
- Рынков услуг
- Поставок B2B
- Отраслевых рынков

Применение

- Пересмотр рыночных тенденций
- Обновление информации о конкурентах и стратегиях «поглощения и слияния»
- Реагирование на изменения на рынке
- Определить перспективы развития

Страны



Факторы влияющие на окружающую среду Вашего бизнеса

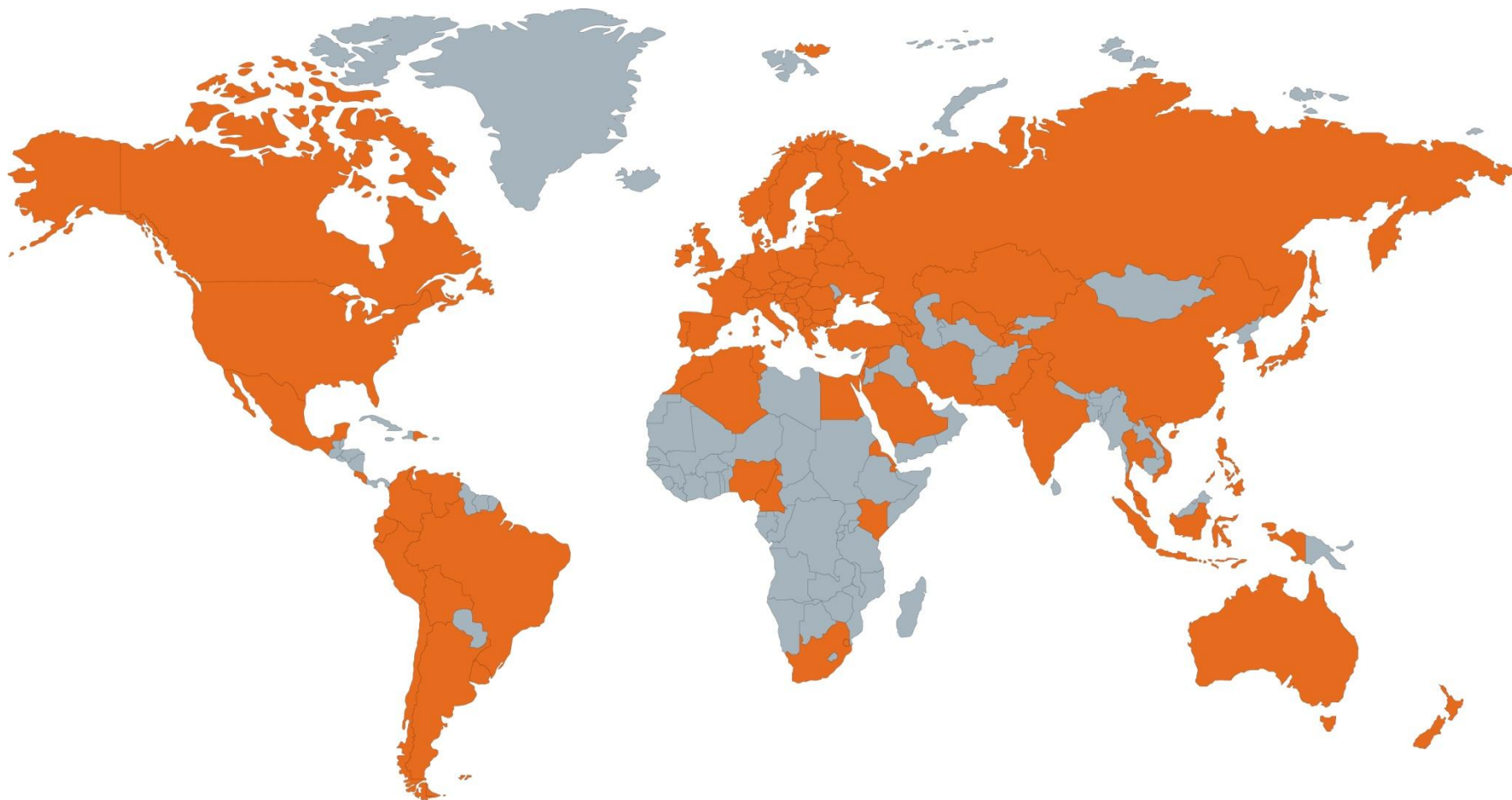
Отслеживание

- Экономических показателей
- Источники энергии и окружающая среда
- Демографические тенденции
- Производство и торговля

Применение

- Предвидение экономической ситуации
- Отслеживание специфических факторов
- Наблюдение за демографическими тенденциями
- Исследование глобальных факторов, влияющих на бизнес

80 основных стран



80 основных стран

- **85% мирового населения**
- **98% глобального потребления**

205 стран в целом



мнение и поведение потребителей



Потребители

Отслеживание

- Сведений о домохозяйствах
- Распределение дохода
- Анализ образа жизни
- Социальные тенденции

Применение

- Изучение потребителей
- Понимание культурных различий
- Определение новых потребительских сегментов
- Определение новых тенденций

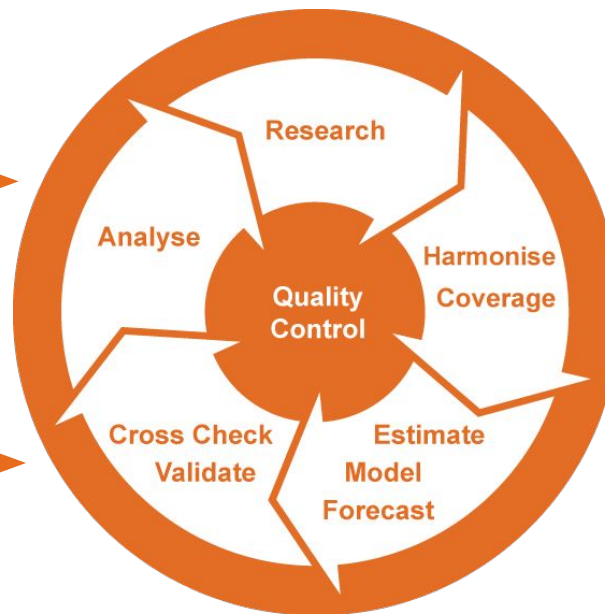
Последовательная методология для всех стран

Сравнимые определения

Многочисленные источники точной информации

Наш подход к исследованиям

Тщательная оценка данных и проверка путем сравнения данных по странам



Преимущества отношений с клиентами

Глубокие исследования в каждой стране: опубликованная информация, мнения, анализ

Параллельные исследования на международном уровне

Корпоративные клиенты: некоторые примеры



Академические клиенты и консорциумы: примеры



Правительственные и Торговые клиенты: Примеры



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agriculture, nature
and food quality



the dti

THE DEPARTMENT
OF TRADE AND INDUSTRY
SOUTH AFRICA



Singapore

INTERNATIONAL
ENTERPRISE
SINGAPORE



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EXPORTRÅDET
SWEDISH TRADE COUNCIL



International Trade
Canada

Commerce international
Canada

Business
LINK

EVD internationaal ondernemen en samenwerken



המכון הישראלי לייצוא ולשיתוף פעולה בין-לאומי
The Israel Export & International Cooperation Institute



Australian Government
Austrade

UBIFRANCE



กรมส่งเสริมการค้าระหว่างประเทศ

DEPARTMENT OF EXPORT PROMOTION



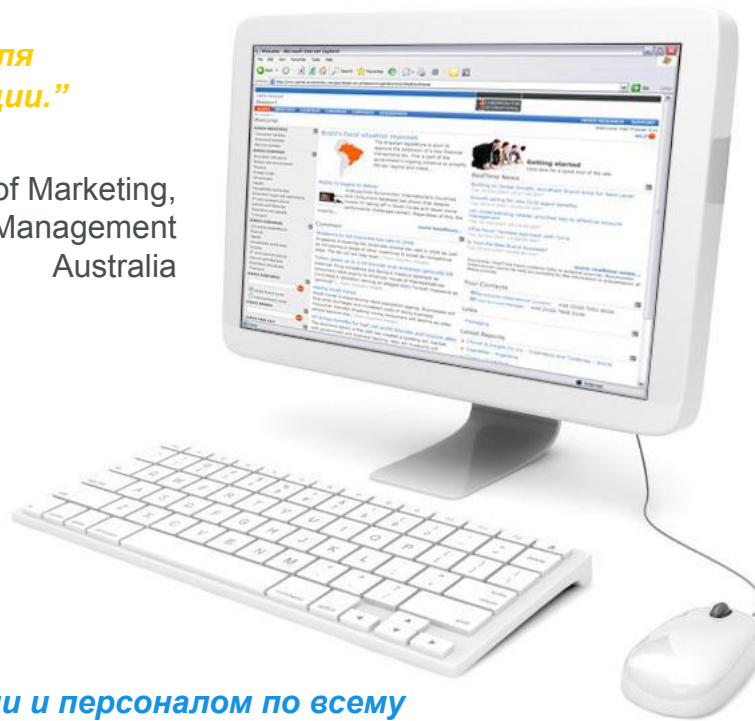
Клиенты. Украина.

1. **Informatio Consorcium**
2. **Chernivtsi university**
3. **Kharkiv State university**
4. **Kiev National Trading university**
5. **Kiev National university**
6. **International Management Institute MIM-Kyiv**

Рекомендации наших пользователей

“...первичный источник для маркетинговой информации.”

Professor of Marketing,
Graduate School of Management
Australia



“ С нашими студентами и персоналом по всему миру, мы находим международный охват бесценным. ”

Judge Business School Library,
University of Cambridge

“... сильно используемый продукт, и не только бизнес школой”.

Business Electronic Services Librarian,
Columbia University Library

“ Одна из наших сильно используемых баз данных. Мы не хотели бы быть без неё ”.

IMD,
Switzerland

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GO

Global brand owner

National brand owner


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Concerns about food additives could change the face of Chinese cuisine



Chinese cuisine has long been renowned for the intensity of its flavours, influenced by both national diet staples such as duck, pork and beef as well as distinct local and...

Next steps in Unilever's food business strategy



Unilever's recent large-scale acquisitions, that of Alberto-Culver for US\$3.7 billion and a year earlier Sara Lee's personal care business for US\$1.9 billion, have expanded the company's personal care operations, while...

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Экономические показатели - расходы и доходы

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CONVERT DATA

- Currency conversions
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 - US\$ (y-o-y ex rates)
 - US\$ (fixed ex rates)
 - Euro (y-o-y ex rates)
 - Euro (fixed ex rates)
 - £ (y-o-y ex rates)
 - £ (fixed ex rates)
 - JPY (y-o-y ex rates)
 - JPY (fixed ex rates)
 - CHF (y-o-y ex rates)
 - CHF (fixed ex rates)
- Current/constant
- Unit multiplier
- Growth
- Per capita/household

CHANGE SELECTIONS

- Change Time Series
- Change Categories
- Change Geographies

Historic • US\$ mn • Current Prices • Fixed 2009 Exchange Rates

Key: Related Reports Related Comment Chart for this Row

		2004	2005	2006	2007	2008	2009
Consumer Expenditure on Coffee, Tea and Cocoa							
<input type="checkbox"/>	Russia	1.860,0	2.204,1	2.647,8	2.992,5	3.774,1	3.638,0
<input type="checkbox"/>	Poland	1.502,6	1.558,1	1.743,9	1.882,8	2.071,3	2.182,2
<input type="checkbox"/>	Ukraine	343,7	480,3	609,1	837,7	1.153,4	1.185,1
<input type="checkbox"/>	Czech Republic	422,0	432,8	453,4	523,3	581,8	571,9
<input type="checkbox"/>	Lithuania	176,2	199,2	206,6	234,2	214,4	187,3
<input type="checkbox"/>	Estonia	38,6	44,0	48,7	51,7	47,5	33,8
Consumer Expenditure on Beer							
<input type="checkbox"/>	Russia	1.834,9	2.212,1	2.791,7	3.405,0	4.086,5	4.267,1
<input type="checkbox"/>	Poland	2.143,6	2.220,2	2.338,1	2.484,9	2.719,5	2.837,2
<input type="checkbox"/>	Czech Republic	1.612,5	1.725,0	1.852,7	1.935,1	2.022,8	2.057,2
<input type="checkbox"/>	Ukraine	268,1	361,1	436,4	570,5	772,4	787,9
<input type="checkbox"/>	Lithuania	345,8	342,9	336,6	319,8	354,4	380,6
<input type="checkbox"/>	Estonia	163,5	183,8	215,7	248,2	253,4	206,8
Consumer Expenditure on Tobacco							
<input type="checkbox"/>	Poland	5.498,9	5.972,5	6.344,4	6.856,7	7.633,2	8.110,3
<input type="checkbox"/>	Russia	2.296,5	2.584,8	3.173,7	3.456,0	4.336,8	4.148,7
<input type="checkbox"/>	Czech Republic	2.770,7	2.828,0	3.006,4	3.431,2	3.849,4	3.816,1
<input type="checkbox"/>	Ukraine	435,4	617,8	790,2	1.065,0	1.478,4	1.539,7
<input type="checkbox"/>	Lithuania	164,7	185,4	239,8	310,8	372,7	267,2
<input type="checkbox"/>	Estonia	170,6	186,7	209,7	237,4	239,7	186,2
Annual Gross Income							
<input type="checkbox"/>	Russia	373.900,3	455.865,5	561.053,5	687.047,7	859.982,6	910.285,3
<input type="checkbox"/>	Poland	259.160,9	275.514,0	292.510,0	318.583,3	340.661,1	357.268,0
<input type="checkbox"/>	Czech Republic	114.625,7	121.053,1	130.913,6	143.397,1	152.858,0	150.116,4
<input type="checkbox"/>	Ukraine	35.035,2	49.038,0	59.561,0	77.626,3	106.098,8	102.775,8
<input type="checkbox"/>	Lithuania	20.568,9	23.549,0	27.158,1	30.849,7	36.220,3	31.885,2
<input type="checkbox"/>	Estonia	9.467,6	10.804,1	12.921,2	15.613,5	16.936,7	14.260,0
Annual Disposable Income							
<input type="checkbox"/>	Russia	302.723,6	376.804,0	466.376,5	568.833,9	704.820,7	743.883,0
<input type="checkbox"/>	Poland	201.139,9	211.163,1	222.043,4	237.860,9	254.567,6	267.505,7
<input type="checkbox"/>	Czech Republic	77.307,5	81.366,1	87.860,4	96.154,5	104.201,7	103.720,7
<input type="checkbox"/>	Ukraine	27.285,2	38.356,1	46.726,4	60.539,4	81.624,6	79.069,7
<input type="checkbox"/>	Lithuania	16.506,1	18.745,6	21.448,8	23.961,1	28.276,5	24.864,5
<input type="checkbox"/>	Estonia	6.888,2	7.877,5	9.461,8	11.389,1	12.259,0	10.285,1

Category definitions | Calculation variables

Демографические прогнозы до 2020 г.

Historic/Forecast • '000

Key: Related Reports Related Comment Chart for this Row

		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Population: National Estimates at January 1st																			
	Eastern Europe	335.630,1	334.361,2	333.158,3	332.128,6	331.514,8	331.100,7	330.688,2	329.989,7	329.302,0	328.649,8	328.025,3	327.374,6	326.698,8	325.994,3	325.260,5	324.490,3	323.675,3	
	Albania	3.098,7	3.110,6	3.121,8	3.132,5	3.143,3	3.155,3	3.169,1	3.184,8	3.201,8	3.219,8	3.238,0	3.256,0	3.273,6	3.290,7	3.307,1	3.322,9	3.337,8	
	Belarus	9.849,1	9.800,1	9.750,5	9.714,5	9.690,0	9.672,0	9.652,7	9.626,3	9.599,4	9.572,0	9.544,0	9.515,4	9.486,3	9.456,6	9.426,1	9.394,7	9.362,3	
	Bosnia-Herzegovina	3.837,4	3.842,5	3.842,7	3.844,0	3.843,8	3.844,5	3.844,4	3.843,7	3.842,8	3.841,5	3.839,7	3.837,1	3.833,3	3.828,5	3.822,8	3.816,2	3.808,6	
	Bulgaria	7.778,1	7.728,0	7.676,1	7.623,7	7.571,4	7.519,2	7.466,9	7.414,7	7.362,4	7.306,2	7.249,8	7.190,8	7.130,7	7.070,0	7.008,9	6.947,4	6.885,4	
	Croatia	4.441,8	4.443,9	4.442,8	4.439,9	4.435,0	4.428,5	4.421,0	4.412,7	4.403,7	4.394,2	4.384,1	4.373,6	4.362,7	4.351,4	4.339,6	4.327,5	4.314,9	
	Czech Republic	10.211,5	10.220,6	10.251,1	10.287,2	10.381,1	10.467,5	10.512,4	10.546,9	10.582,5	10.616,0	10.646,5	10.674,2	10.699,6	10.722,7	10.742,9	10.760,3	10.774,5	
	Estonia	1.351,1	1.347,5	1.344,7	1.339,8	1.335,1	1.330,6	1.326,1	1.321,7	1.316,8	1.311,8	1.306,9	1.302,2	1.297,7	1.293,4	1.289,3	1.285,5	1.282,0	
	Georgia	4.315,2	4.321,5	4.401,3	4.394,7	4.382,1	4.385,4	4.389,0	4.393,3	4.398,1	4.403,3	4.408,6	4.413,7	4.418,2	4.422,0	4.425,2	4.427,7	4.429,4	
	Hungary	10.116,7	10.097,5	10.076,6	10.057,9	10.038,9	10.019,7	9.999,7	9.979,5	9.953,7	9.925,9	9.897,9	9.870,7	9.843,9	9.817,9	9.793,0	9.767,6	9.748,0	
	Kosovo	2.041,0	2.070,0	2.100,0	2.126,0	2.153,0	2.180,9	2.209,0	2.236,6	2.263,8	2.290,7	2.317,5	2.344,6	2.372,0	2.399,7	2.427,5	2.455,5	2.483,5	
	Latvia	2.319,2	2.306,4	2.294,6	2.280,4	2.266,7	2.253,5	2.240,3	2.227,6	2.213,6	2.199,3	2.185,3	2.171,8	2.158,6	2.145,7	2.133,3	2.121,3	2.109,9	
	Lithuania	3.445,9	3.425,3	3.403,3	3.384,8	3.366,3	3.347,9	3.329,5	3.311,1	3.291,9	3.272,4	3.253,1	3.234,4	3.216,1	3.198,3	3.181,2	3.165,0	3.149,8	
	Macedonia	2.030,3	2.033,7	2.036,4	2.038,5	2.040,0	2.040,9	2.041,3	2.041,3	2.040,8	2.039,8	2.038,6	2.037,0	2.035,3	2.033,2	2.030,8	2.028,1	2.024,8	
	Moldova	3.819,6	3.759,3	3.708,8	3.667,5	3.633,4	3.603,5	3.575,6	3.549,2	3.524,8	3.502,3	3.481,6	3.462,4	3.444,4	3.427,3	3.410,8	3.394,6	3.378,4	
	Montenegro	622,1	623,3	624,2	625,6	626,8	628,0	629,2	630,2	631,3	632,3	633,2	634,1	634,9	635,8	636,5	637,3	638,0	
	Poland	38.190,6	38.173,8	38.157,1	38.125,5	38.115,6	38.135,9	38.167,3	38.189,3	38.211,6	38.233,0	38.255,0	38.268,8	38.279,3	38.284,1	38.281,3	38.269,7	38.247,9	
	Romania	21.711,3	21.658,5	21.610,2	21.555,5	21.496,6	21.435,2	21.369,8	21.301,9	21.232,3	21.144,6	21.056,0	20.953,0	20.844,1	20.733,3	20.621,0	20.506,2	20.388,9	
	Russia	144.168,2	143.474,2	142.753,6	142.221,0	142.008,8	141.904,0	141.785,7	141.466,7	141.172,9	140.934,6	140.723,9	140.507,2	140.274,8	140.026,2	139.761,2	139.476,6	139.169,5	
	Serbia	7.463,2	7.440,8	7.421,0	7.402,2	7.384,3	7.367,2	7.351,0	7.335,5	7.320,7	7.306,7	7.293,3	7.280,6	7.268,5	7.256,9	7.245,9	7.235,5	7.225,5	
	Slovakia	5.380,1	5.384,8	5.389,2	5.391,6	5.393,6	5.395,3	5.396,7	5.397,9	5.398,3	5.398,4	5.398,3	5.397,8	5.397,0	5.396,0	5.394,5	5.392,7	5.390,2	
	Slovenia	1.996,4	1.997,6	2.003,4	2.010,3	2.016,5	2.022,8	2.028,9	2.035,0	2.038,8	2.042,1	2.045,1	2.048,0	2.050,8	2.053,5	2.056,0	2.058,5	2.061,0	
	Ukraine	47.442,8	47.101,2	46.749,2	46.465,7	46.192,3	45.962,8	45.782,6	45.543,9	45.299,9	45.062,7	44.830,8	44.601,4	44.377,0	44.151,2	43.925,2	43.697,9	43.465,0	
	Western Europe	464.135,8	467.448,0	470.410,4	473.557,5	476.872,5	479.733,6	482.231,8	484.341,2	486.360,0	488.364,8	490.353,4	492.285,3	494.163,8	495.989,6	497.758,0	499.466,2	501.115,3	
	Andorra	76,9	78,5	78,9	79,1	79,4	79,6	79,7	79,8	79,9	79,9	79,8	79,7	79,6	79,3	79,1	78,8	78,5	
	Austria	8.140,1	8.206,5	8.265,9	8.314,5	8.351,8	8.383,1	8.408,8	8.433,9	8.458,9	8.483,6	8.507,4	8.530,5	8.552,7	8.574,1	8.594,7	8.614,7	8.633,8	
	Belgium	10.396,4	10.445,9	10.511,4	10.584,5	10.666,9	10.750,0	10.827,0	10.896,3	10.962,7	11.028,6	11.092,8	11.155,7	11.217,3	11.277,7	11.337,2	11.395,8	11.453,5	
	Cyprus	826,7	836,0	845,0	853,8	862,4	871,0	879,7	888,5	897,4	906,5	915,5	924,6	933,7	942,8	952,0	961,1	970,1	
	Denmark	5.397,6	5.411,4	5.427,5	5.447,1	5.475,8	5.511,5	5.526,0	5.541,4	5.556,7	5.572,0	5.587,1	5.602,1	5.617,2	5.632,6	5.648,2	5.664,2	5.680,6	
	Finland	5.219,7	5.236,6	5.255,6	5.277,0	5.300,5	5.325,1	5.347,6	5.368,7	5.388,3	5.407,5	5.426,2	5.444,0	5.460,9	5.476,8	5.492,3	5.506,5	5.520,0	
	France	60.461,6	60.825,0	61.166,8	61.538,3	62.105,9	62.449,0	62.772,0	63.055,3	63.339,9	63.618,4	63.889,1	64.153,0	64.410,8	64.662,3	64.907,5	65.146,2	65.378,6	
	Germany	82.531,7	82.500,8	82.438,0	82.314,9	82.217,8	82.002,4	81.721,5	81.420,7	81.147,5	80.884,4	80.631,2	80.373,5	80.110,2	79.841,5	79.567,8	79.288,2	79.003,0	
	Gibraltar	28,8	29,1	29,3	29,3	29,3	29,2	29,2	29,2	29,2	29,2	29,3	29,3	29,3	29,3	29,3	29,3	29,3	
	Greece	11.040,7	11.082,8	11.125,2	11.169,1	11.211,5	11.251,9	11.290,0	11.324,9	11.357,1	11.387,1	11.413,5	11.437,0	11.456,9	11.473,0	11.485,6	11.494,8	11.501,2	
	Iceland	291,4	295,7	301,4	308,1	315,5	322,7	329,3	335,1	340,2	344,7	348,9	353,0	356,9	360,6	364,1	367,4	370,5	
	Ireland	4.027,7	4.109,2	4.209,0	4.312,5	4.401,3	4.450,0	4.455,8	4.437,9	4.434,6	4.441,5	4.453,5	4.467,7	4.483,7	4.501,1	4.519,5	4.538,5	4.557,8	
	Italy	57.888,2	58.462,4	58.751,7	59.131,3	59.619,3	60.053,4	60.401,1	60.668,7	60.892,0	61.081,1	61.246,6	61.392,2	61.523,0	61.640,8	61.746,2	61.841,7	61.928,6	
	Liechtenstein	34,3	34,6	34,9	35,2	35,5	35,8	36,1	36,4	36,7	37,0	37,3	37,5	37,8	38,1	38,4	38,7	39,0	

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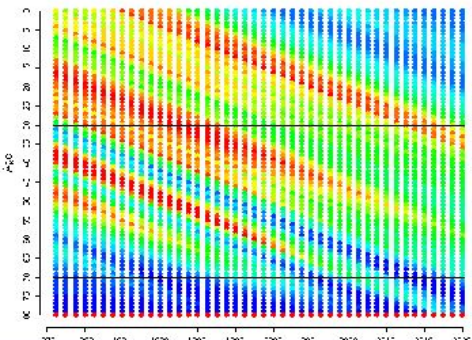
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Country Pulse

- Domino's pizza on the way, but local players are nonchalant (september 2010)
- Litter perceived as kiev's biggest problem (september 2010)
- Previous experience found to be most important factor in choosing medicines (october 2010)
- Remembering chornobyl (october 2010)
- Waste hazard (october 2010)

Future Demographic

Future Demographic - Ukraine
Age Structure of the Population at a Glance, Each Dot Represents a Single Age Group-->



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- Torgova Companiya Eldorado TOV - Consumer Electronics - Ukraine

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Key Metrics

Statistical Summary	2008	2009
Inflation (% change)	25,3	16,0
Exchange rate (per US\$)	5,27	7,79

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Consumer Lifestyle

The screenshot displays the Euromonitor International Passport GMID interface. At the top, there is a navigation bar with the logo and a search box. Below the navigation bar, the main content area is titled "Consumer Lifestyles in Ukraine". The left sidebar contains a "TABLE OF CONTENTS" with sections for "CONSUMER TRENDS", "POPULATION", and "REPORTS". The main content area is divided into several sections: "CONSUMER TRENDS" with a sub-section "The Ukrainian government attempts to stimulate population growth", "Outlook", "Impact", "Consumer disposable incomes are growing", and another "Outlook". The right sidebar contains "RELATED INFORMATION" with sections for "Statistics", "Comment", and "More Related Items...".

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Welcome, Pavel Milasevic

Consumer Lifestyles in Ukraine

CONSUMER TRENDS

The Ukrainian government attempts to stimulate population growth

The Ukrainian government has found ways to increase national birth rates. Since 2005, the government has provided financial support to families when children are born. This financial help has increased significantly each year. In 2007, financial help was differentiated between first, second and third children. Thus, for first child the family received UAH 8,000, UAH 25,000 for the second child and UAH 50,000 for the third child. Such family support has served its purpose, as birth rates have started to grow. This growth, however, is concentrated in urban areas where people have better employment opportunities.

Outlook

During the forecast period, the Ukrainian government plans to provide new social programmes in order to further increase birth rates. The main incentive will continue as financial help, which applies not only after the baby is born, but also during pregnancy (during the third trimester). The Ukrainian government also plans to invest in various youth institutions such as kindergartens and schools, which are currently undersupplied. For example, with rapidly growing numbers of children in Kiev, only 30% are able to attend kindergarten (according to Kievmiskadministratsia). The government plans to provide social apartments to young families and will assign them according to the number of children in the family.

Impact

The Government's strategy has stimulated a birth rate increase. In 2007, birth rates were 3% higher than in 2006 (Ministry of Justice). With a growing number of children, families in the Ukraine are starting to buy more goods for babies and children such as baby food, diapers, wipes, toys, clothes, and shoes. The increasing numbers of children has also increased demand for durables such as computers, juicers, washing machines, and dishwashers. Prior to the review period, parents were not paying much attention to furniture made for children, but by the end of review period, more people started to perceive children's furniture as a necessity. Pet population is also growing along with child population growth. This is because Ukrainian parents think of pets as part of children's education and development. As a result, consumers are increasingly interested in pet food and animal care products.

Consumer disposable incomes are growing

During the review period, Ukrainian consumers' disposable incomes continued to grow as the result of general economic growth. Disposable incomes are shown to have increased, but since most Ukrainians do not declare all of what they earn, official records are likely underestimating the actual growth. As an example, today in the Ukraine 47% of people have annual incomes greater than US\$1,000 (still growing), whereas the number of people who have incomes of less than US\$500 is decreasing. The Ukrainian economy has been recovering slowly across the entire review period. An informal market economy is still a large part of the overall economy, but its share is declining, which is gradually enhancing the clarity of the general economic situation. The Government continues to try to eliminate informal business practices.

Outlook

Consumer disposable incomes will continue to grow during the forecast period. Consumer incomes will continue varying to actual consumer incomes, as many people will continue receiving payments 'under the table.' Informal business is expected to remain significant during the forecasted period.

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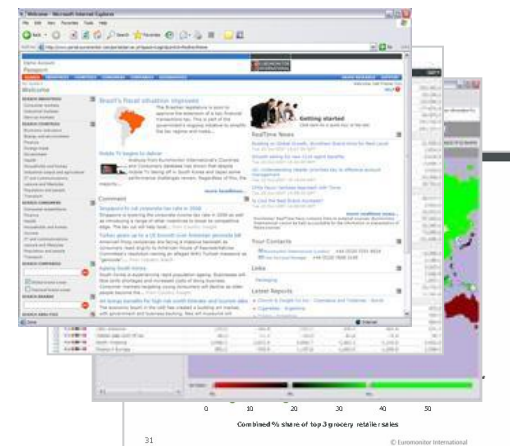
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