ConsumerPulse
BBA ODA tool by BCN PEG

Russia Tea market

Value vs Volume vs Unit
Sales (RUR)

Type
(All)

Starting Year
MAT JUL'2019

Ending Year
MAT JUL'2021

Year
2021

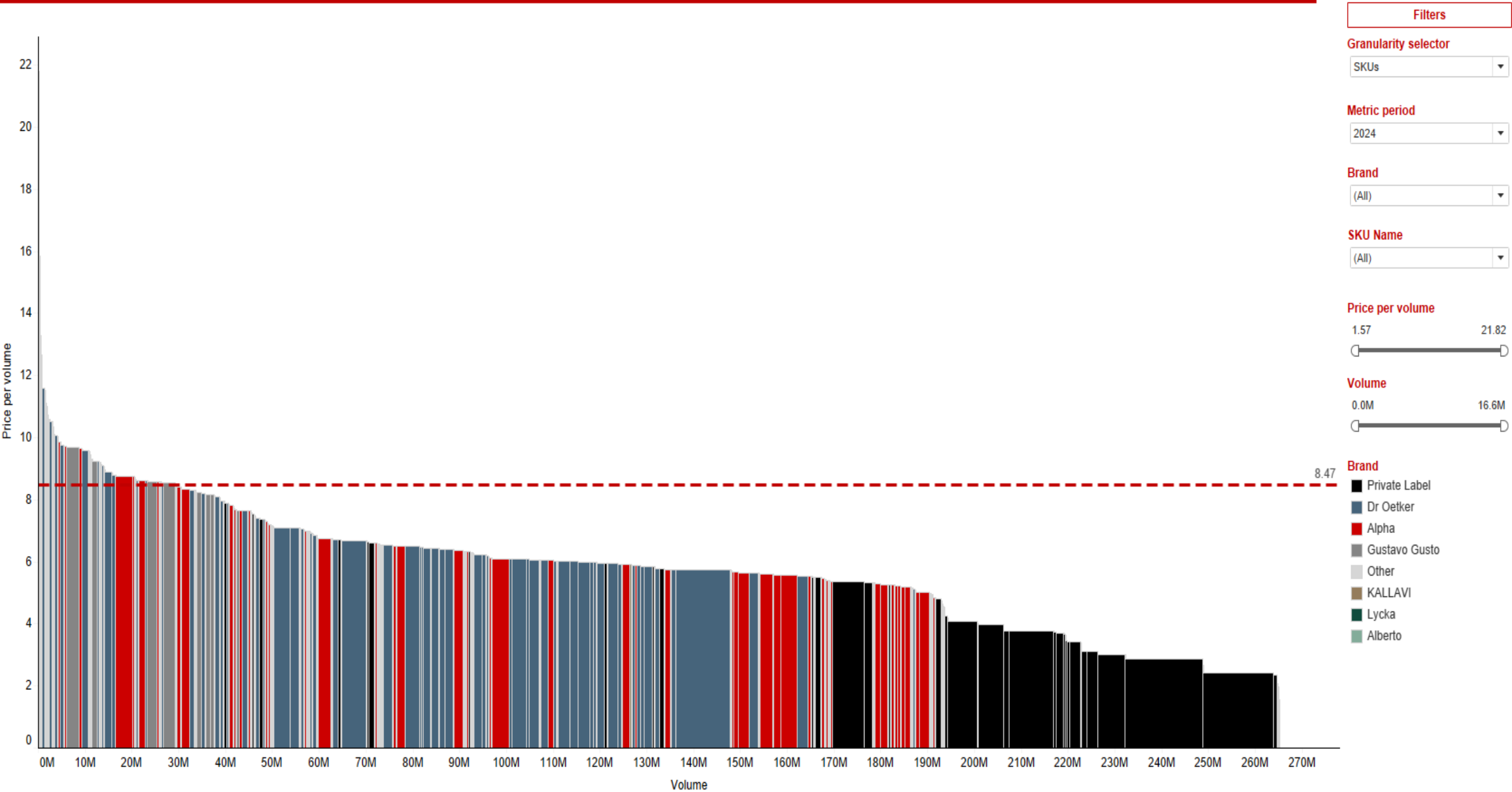Overall Tea Market value (in B, Sales (RUR), MAT JUL'2021)

CAGR '19-'21

79.27B

-1.7%

Brand	CAGR
Akbar (Akbar Broth.Ltd/Shri Lanka	
Azerchay (Azersun Holding/Azerb	26.7%
Mayskiy (May-Foods): 5%	-12.6%
Curtis (May-Foods): 5%	12.2%
Lipton (Unilever): 6%	-15.3%
Ahmad Tea (Ahmad Tea Ltd/Lond	-6.7%
Princessa Noori (Orimi Gk/Spb): 8	-9.9%
Richard (May-Foods): 8%	11.5%
Tess (Orimi Gk/Spb): 9%	8.4%
Greenfield (Orimi Gk/Spb): 2	1.9%

CAGR values will be sorted based on sales in 2021.(Any change to above filters will not impact the order)

Overall

Overall Tea Market value by type (in B, Sales (RUR), MAT JUL'2021)

Total MAT   **79.27B**

64.16B   9.79B   3.13B   2.18B

Other Brands 3%

Akbar (Akbar Broth.Ltd/Shri Lanka) 4%

Azerchay (Azersun Holding/Azerbaydzhan) 5%

Lipton (Unilever) 5%

Mayskiy (May-Foods) 5%

Lipton (Unilever) 6%

Ahmad Tea (Ahmad Tea Ltd/London) 7%

Tess (Orimi Gk/Spb) 9%

Richard (May-Foods) 9%

Princessa Noori (Orimi Gk/Spb) 10%

Greenfield (Orimi Gk/Spb) 22%

Black Tea   **Green Tea**   **Others**
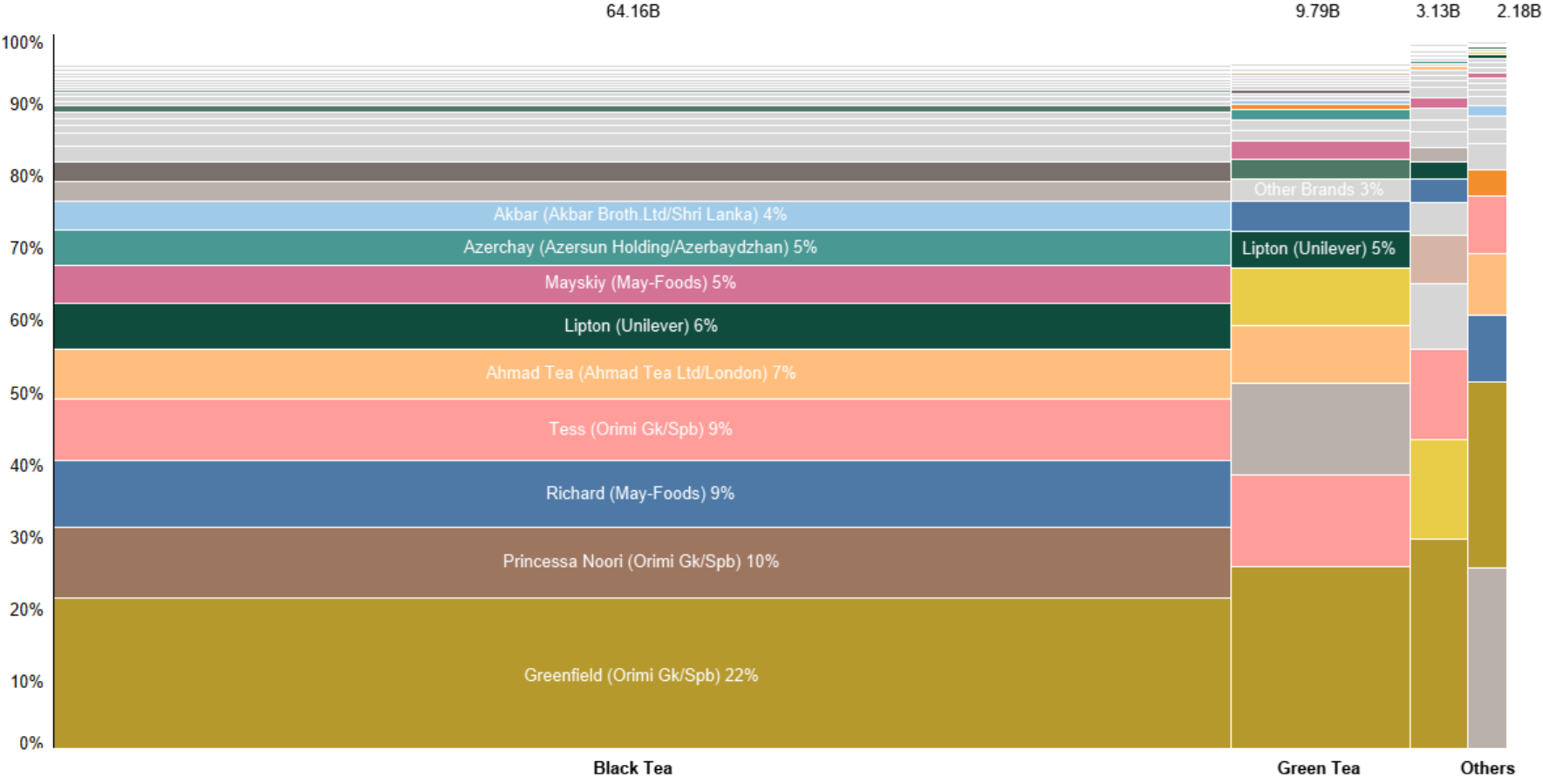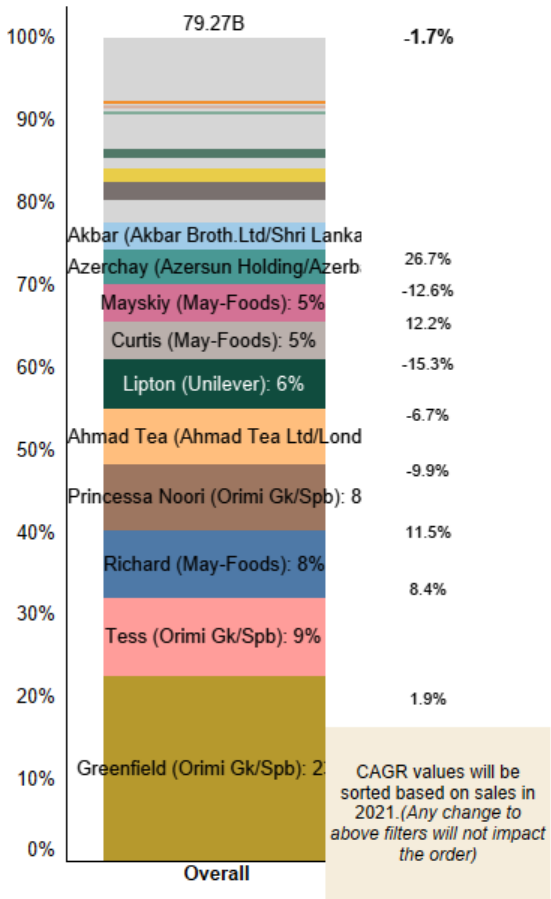
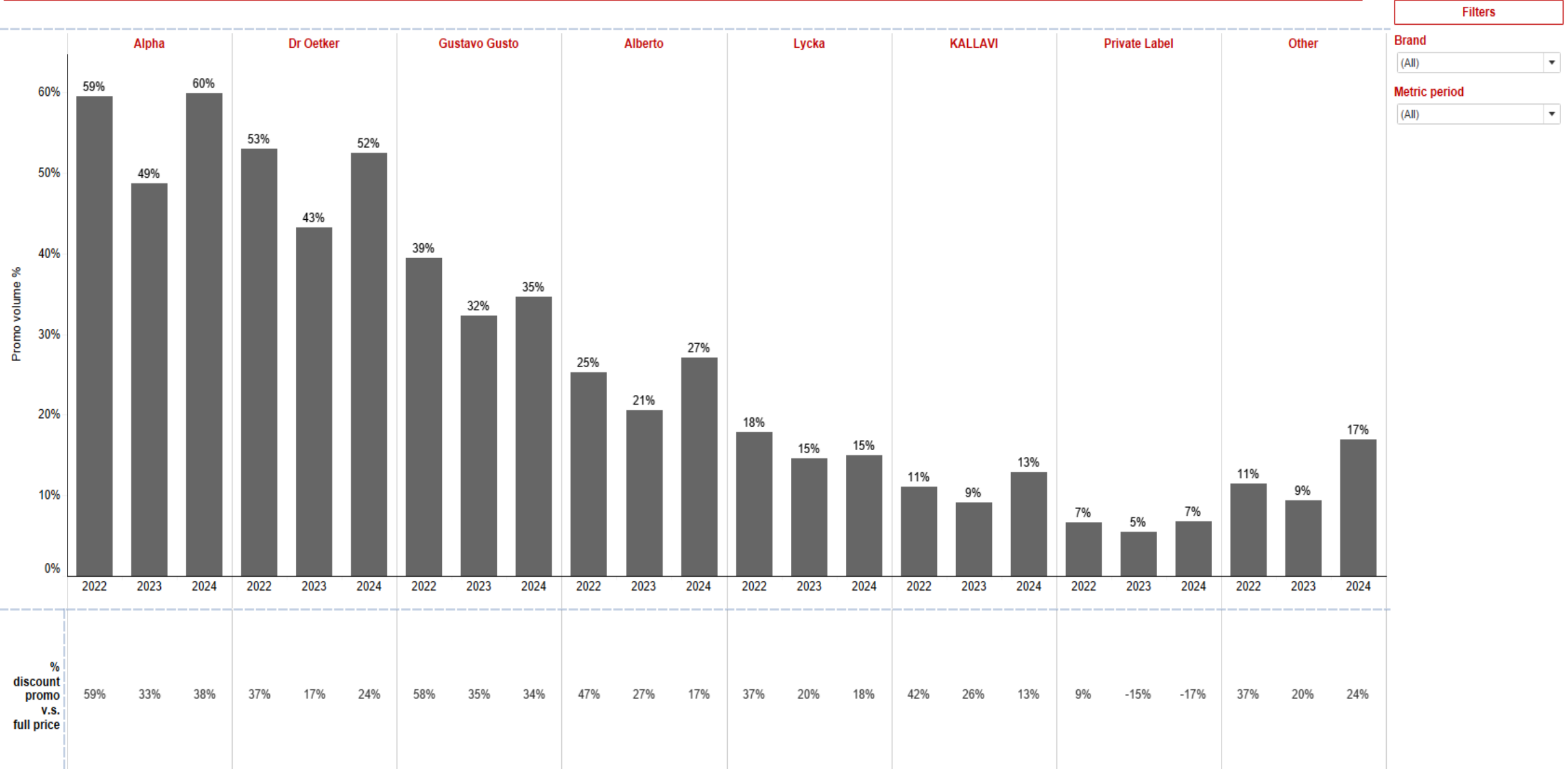|	Black Tea	Green Tea	Others
Segment Share MAT JUL'2021	80.9%	12.4%	4.0% 2.7%
Segment CAGR MAT JUL'2019-MAT JUL'2021	-2.2%	-1.7%	2.6% 7.5%

# Price ladder: Target SKUs falls in the Mainstream segment and is priced slightly lower than core peers

Filters

Granularity selector
SKUs

Metric period
2024

Brand
(All)

SKU Name
(All)

Price per volume
1.57   21.82

Volume
0.0M   16.6M

Brand
- Private Label (black)
- Dr Oetker (blue)
- Alpha (red)
- Gustavo Gusto (gray)
- Other (light gray)
- KALLAVI (brown)
- Lycka (dark green)
- Alberto (light green)

8.47

Price positioning: Target brand has the highest average price per kg

Customize chart view >>
Following filters do not affect the data rows below

Price per volume

1.57 — 21.82

Value

0.0M — 67.1M

Price per volume

	Alpha	Alberto	Dr Oetker	Gustavo Gusto	KALLAVI	Lycka	Private Label	Other
# SKUs	101	3	108	17	3	5	108	275
Price per volume	6.4	4.6	6.7	8.7	5.9	12.9	3.9	8.6

Promotion Intensity by brand over time: Majority brands including target have increased their promotional volumes in the last few years

Brand
(All) ▾

Metric period
(All) ▾

Promo volume %

Brand	Year	Promo volume %	% discount promo v.s. full price
Alpha	2022	59%	59%
Alpha	2023	49%	33%
Alpha	2024	60%	38%
Dr Oetker	2022	53%	37%
Dr Oetker	2023	43%	17%
Dr Oetker	2024	52%	24%
Gustavo Gusto	2022	39%	58%
Gustavo Gusto	2023	32%	35%
Gustavo Gusto	2024	35%	34%
Alberto	2022	25%	47%
Alberto	2023	21%	27%
Alberto	2024	27%	17%
Lycka	2022	18%	37%
Lycka	2023	15%	20%
Lycka	2024	15%	18%
KALLAVI	2022	11%	42%
KALLAVI	2023	9%	26%
KALLAVI	2024	13%	13%
Private Label	2022	7%	9%
Private Label	2023	5%	-15%
Private Label	2024	7%	-17%
Other	2022	11%	37%
Other	2023	9%	20%
Other	2024	17%	24%

Promo intensity, depth and pressure by brand: Brand 1 and target have the strongest promo pressure in the market
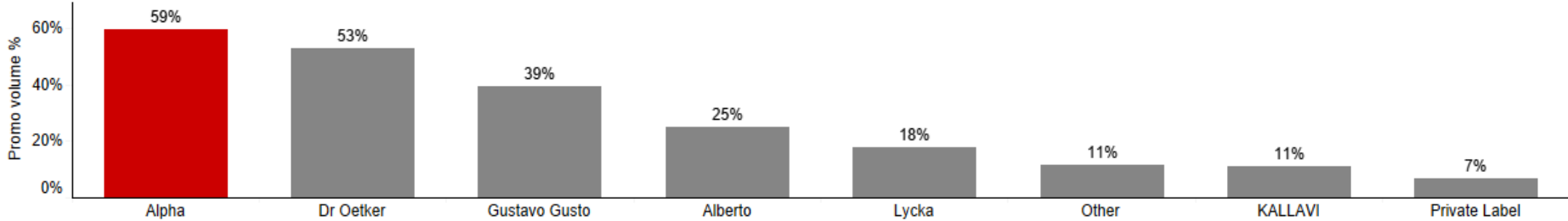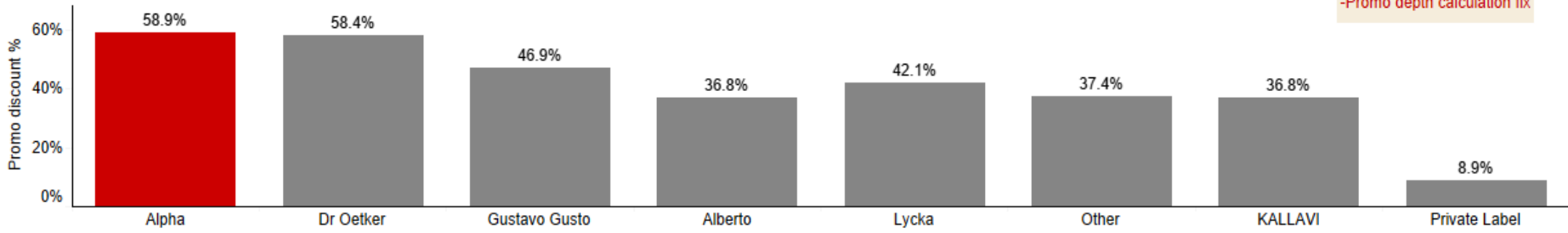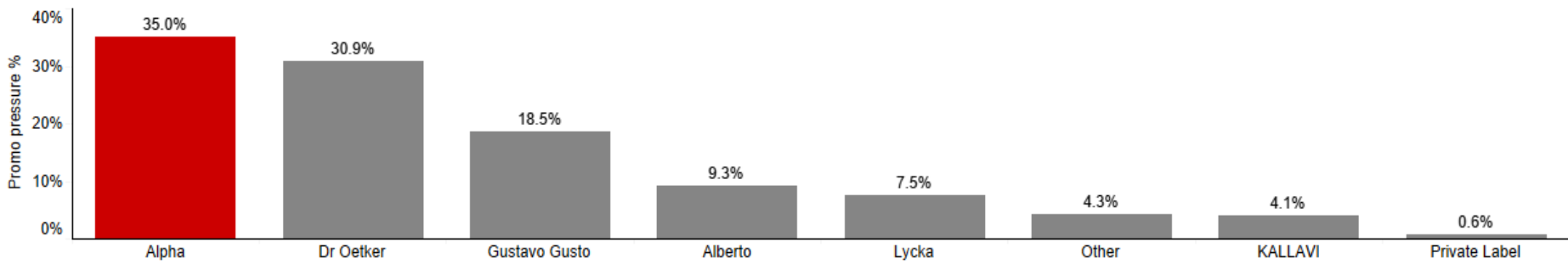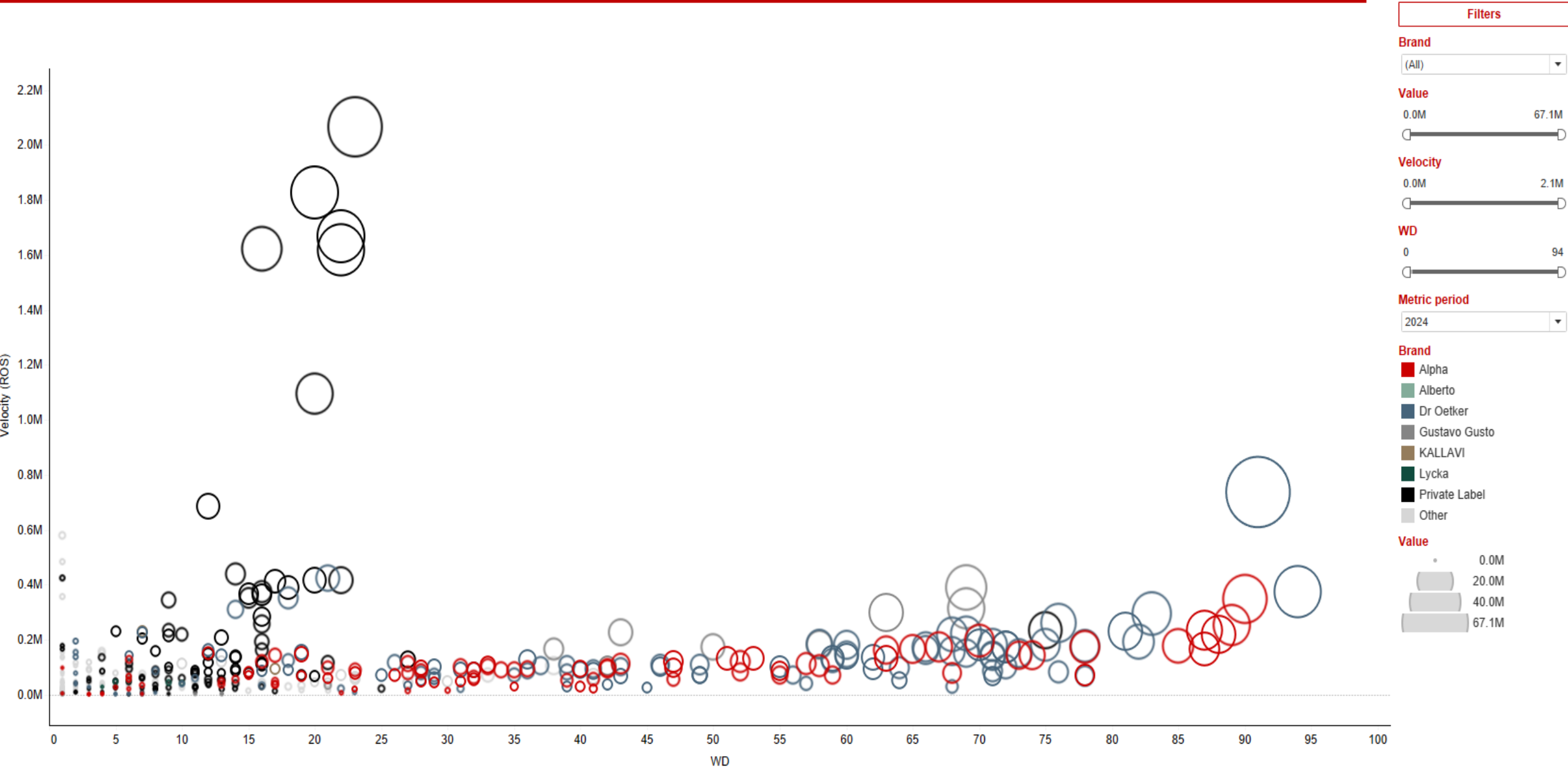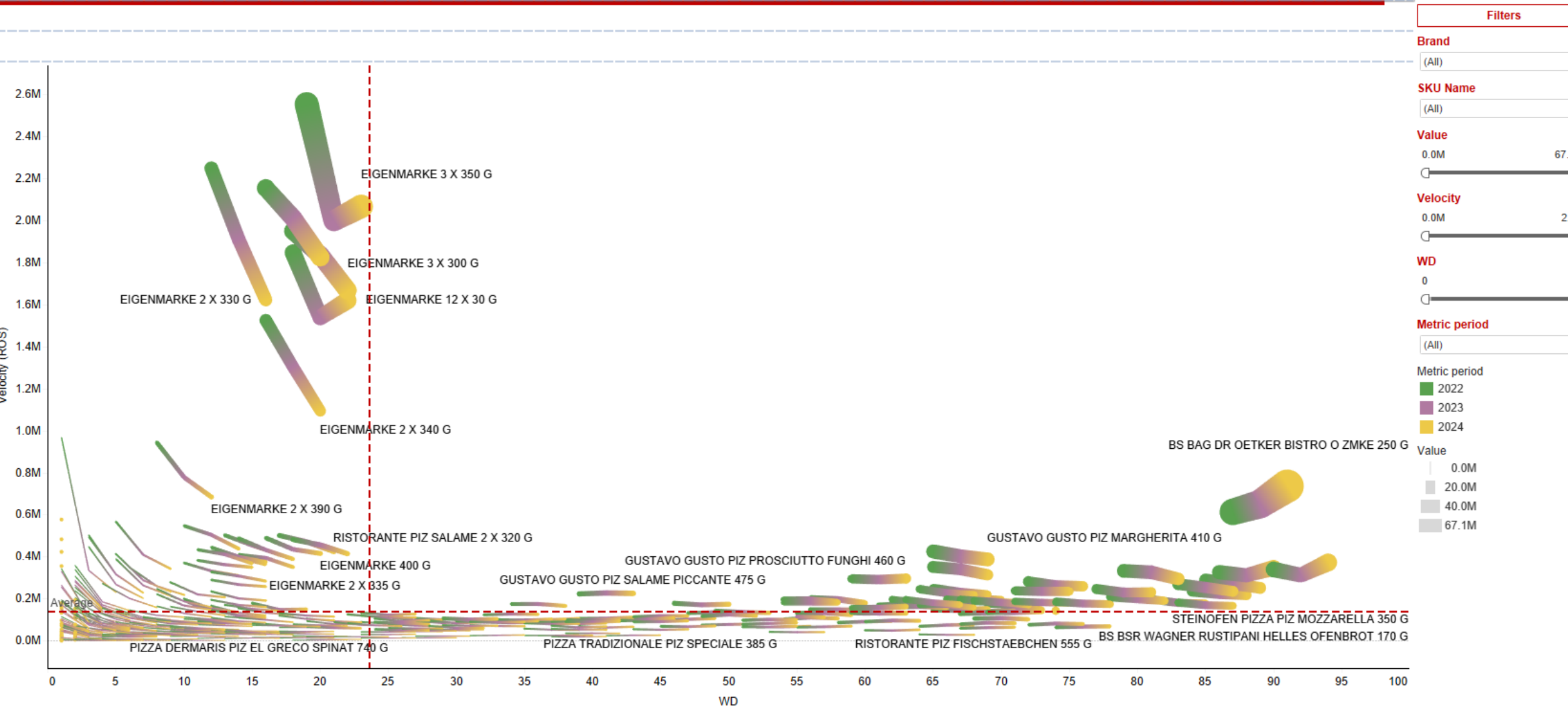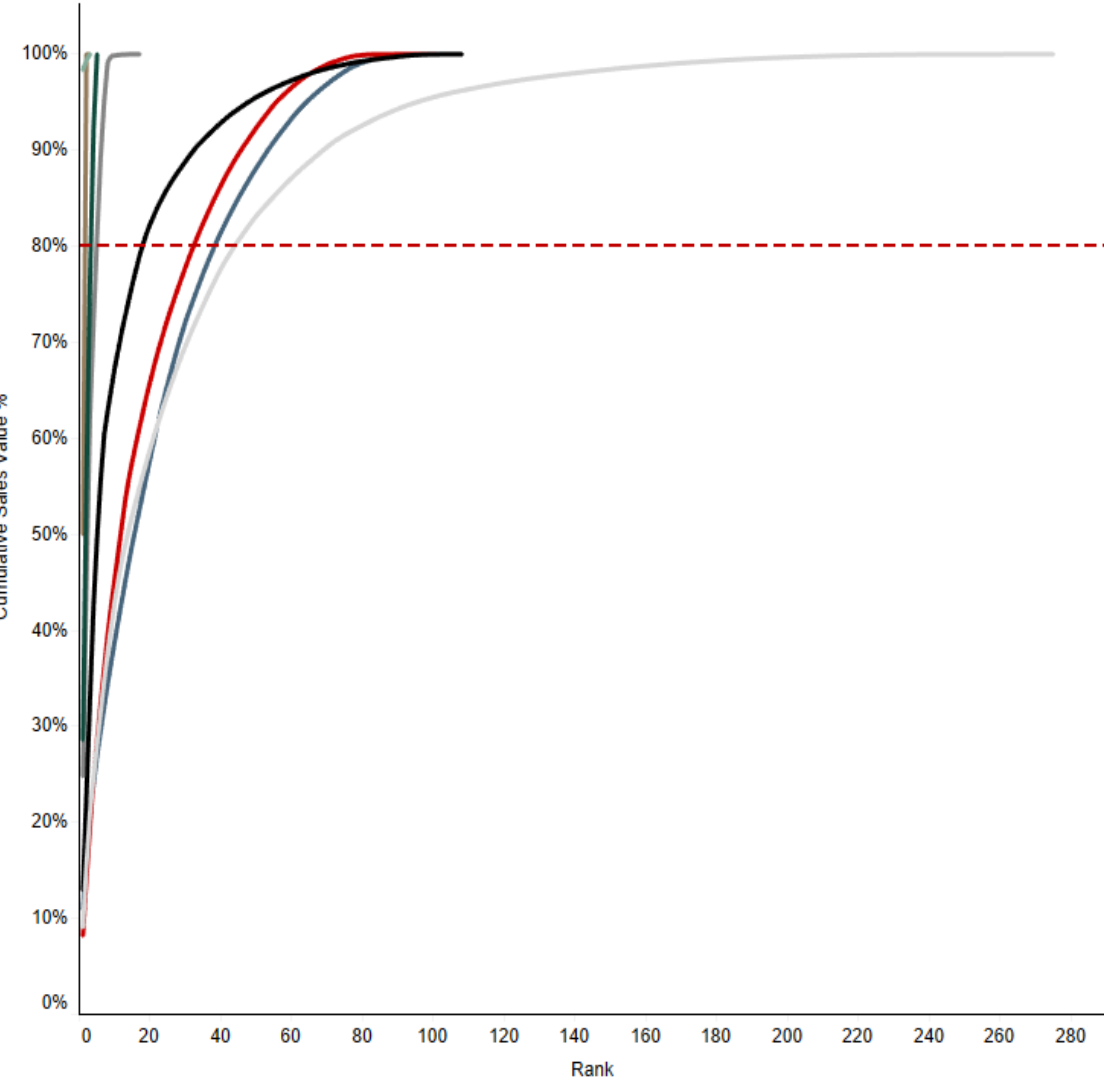
WD-ROS by SKU: SKUs with higher distribution levels also show stronger revenues and rate of sales

RoS vs. distribution over time: SKUs with broader weighted distribution also show higher sales velocity

Pareto analysis for SKUs: Target brand has the most balanced portfolio, requiring more SKUs to reach the 80% RSV threshold vs others

Brand

(All) ▼

Metric period

2024 ▼

SKU Name

(All) ▼

Brand

- Alberto
- Lycka
- KALLAVI
- Other
- Gustavo Gusto
- Private Label
- Alpha
- Dr Oetker

Brand	SKU #1	SKU #2	SKU #3	Sales %	Sales	# SKUs
Alberto	BS BAG FREIBERGER ALBERTO O ZMKE 250 G	ALBERTO PIZ RUCOLA 320 G	ALBERTO PIZ SALAMI 320 G	100%	0.4M	3
Lycka	LYCKA PIZ FUNGHI 300 G	LYCKA PIZ SPINACI 310 G	LYCKA PIZ MARGHERITA 280 G	76%	1.1M	5
KALLAVI	KALLAVI PIZ TUERKISCH 3 X 180 G	KALLAVI PIZ LAHMACUN 2 X 180 G	KALLAVI PIZ LAHMACUN 3 X 180 G	100%	3.2M	3
Other	GARDEN GOURMET PIZ PROTEIN LOVERS 435 G	GARDEN GOURMET PIZ VEGGIE LOVERS 430 G	GANGSTARELLA PIZ TEAM CAPI RINDERSALAMI 442 G	74%	32.6M	275
Gustavo Gusto	GUSTAVO GUSTO PIZ MARGHERITA 410 G	GUSTAVO GUSTO PIZ SALAMI VOM RIND 460 G	GUSTAVO GUSTO PIZ PROSCIUTTO FUNGHI 460 G	62%	67.3M	17
Private Label	EIGENMARKE 3 X 350 G	EIGENMARKE 3 X 300 G	EIGENMARKE 2 X 355 G	33%	120.8M	108
Alpha	STEINOFEN PICCOLINIS PIZ SALAMI 9 X 30 G	STEINOFEN PIZZA PIZ SALAMI 320 G	STEINOFEN FLAMMKU ELSAESSER FLAMMK OA 300 G	20%	74.5M	101
Dr Oetker	BS BAG DR OETKER BISTRO O ZMKE 250 G	DIE OFENFRISCHE PIZ SALAMI 390 G	RISTORANTE PIZ SALAME 320 G	21%	126.9M	108