

Chart 1A

Types of sausage-product shoppers during a store visit, BHT 30.08.22-09.09.22, Insight Expert

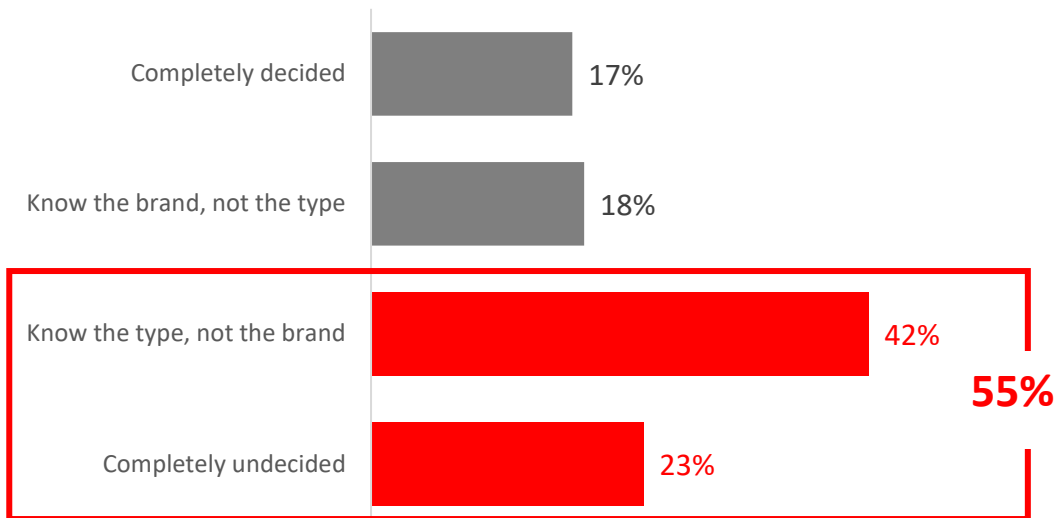


Chart 1B

Shopper response when the brand is absent,, BHT 30.08.22-09.09.22, Insight Expert

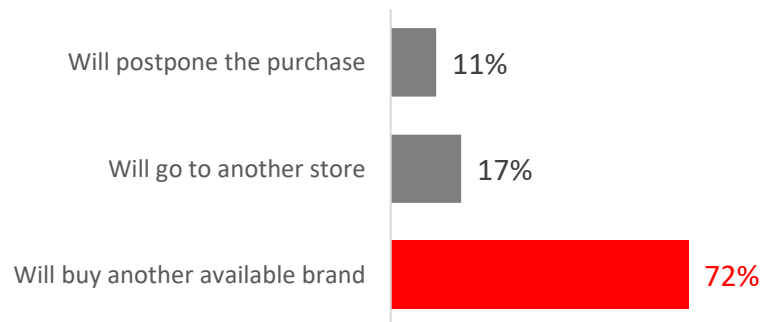


Chart 2

Cross-consumption. Papa Mozhet brand, BHT 30.08.22-09.09.22, Insight Expert

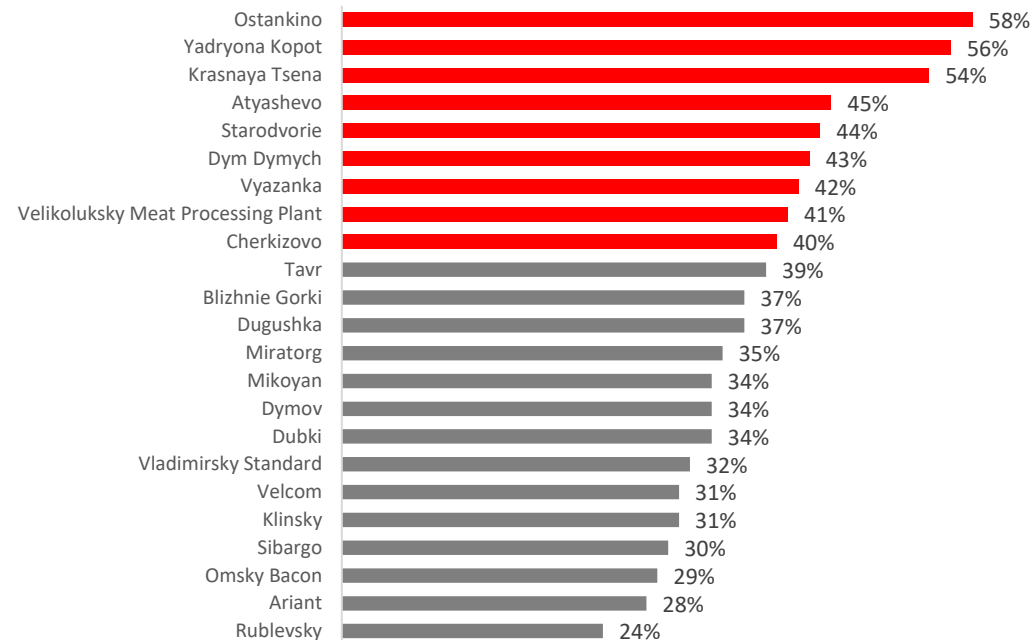


Chart 3

Spontaneous awareness, BHT 30.08.22-09.09.22, Insight Expert

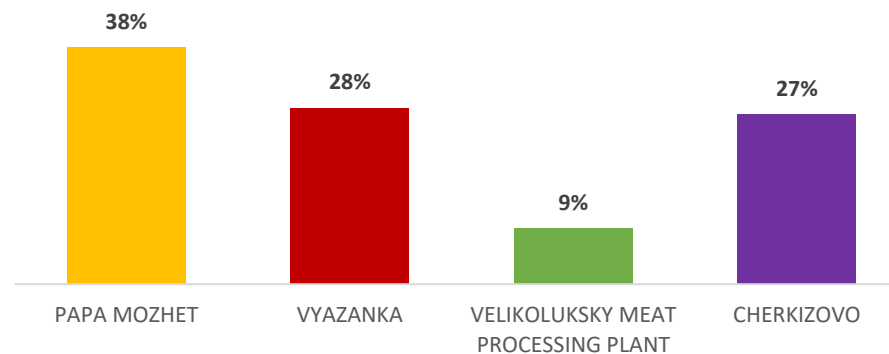
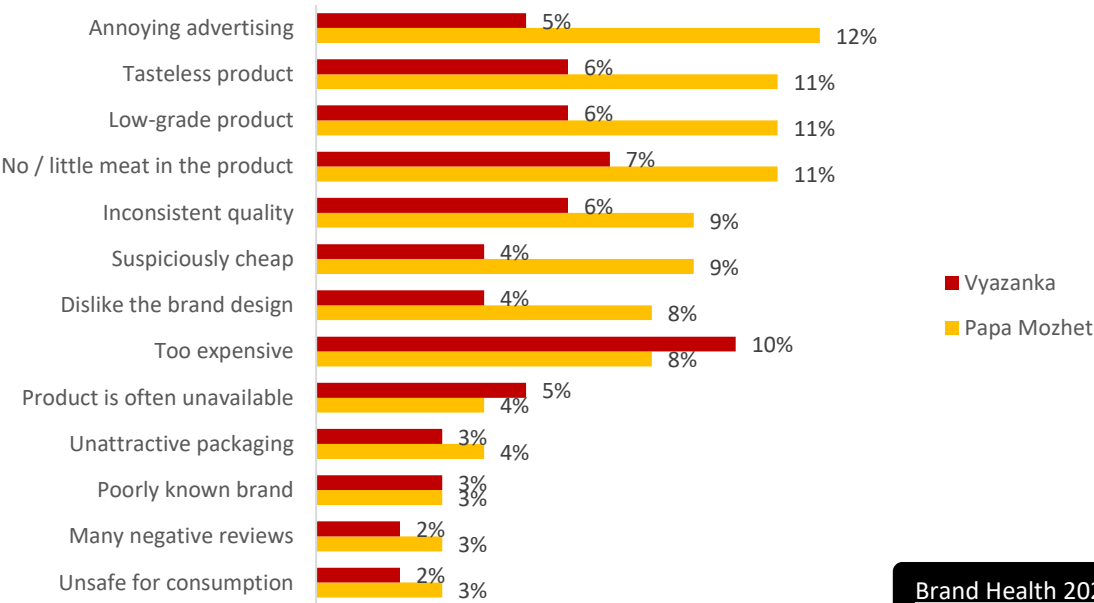


Chart 4

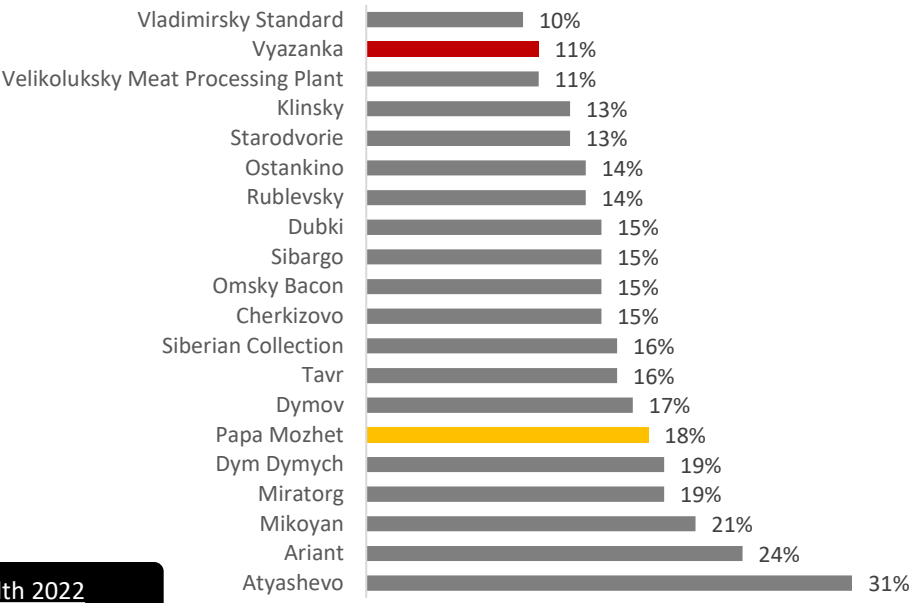
Barriers: Papa Mozhet vs "Vyazanka",
BHT 30.08.22-09.09.22, Insight Expert



Brand Health 2022

Chart 6

Consumption rejection, TOP-20 brands,
BHT 30.08.22-09.09.22, Insight Expert



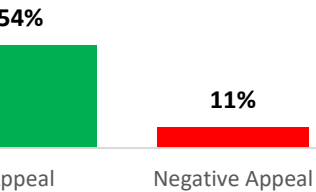
Brand Health 2022

Chart 5

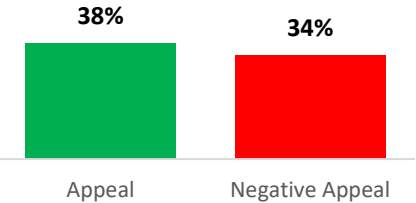
Ad Appeal,
Campaign Effectiveness, 09-2022, Insight Expert



Vyazanka



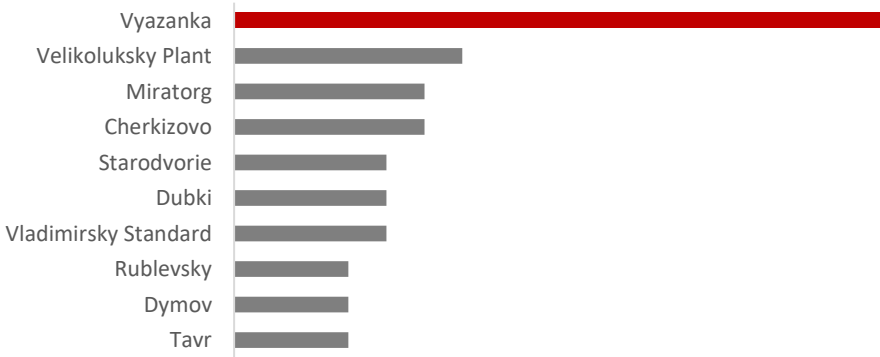
Papa Mozhet



Ad Effectiveness
2022

Chart 7

Switching from Papa Mozhet,
BHT 30.08.22-09.09.22, Insight Expert



Brand Health 2022

Chart 8 Consumer sociodemographic profile, Romir, Q3 2022

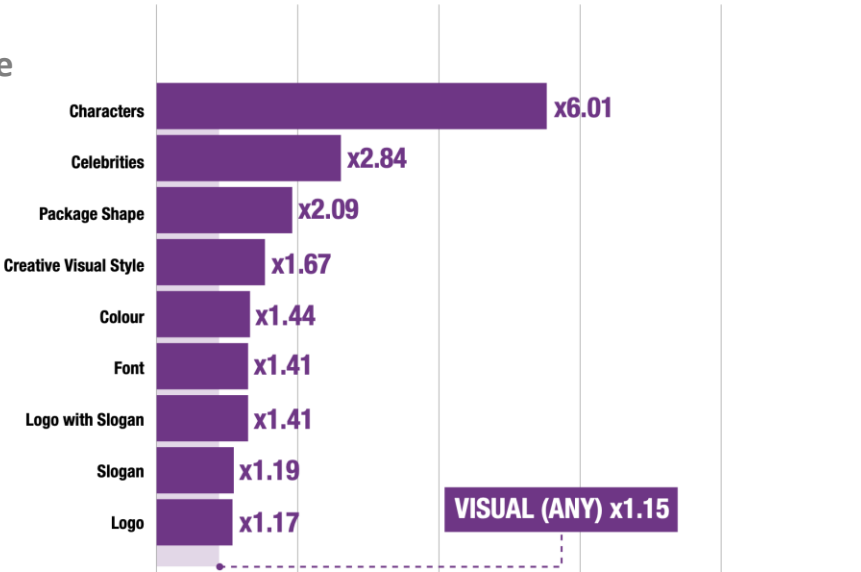
	Papa Mozhet	Vyazanka
Age, share of people		
under 17	1,89%	2,18%
18-29	11,12%	9,15%
30-39	41,30%	41,20%
40-49	24,36%	23,62%
50+	21,32%	24,13%
Gender, share of people		
Male	25,47%	22,57%
Female	74,53%	77,43%

Romir, 2022

Chart 9

THE POWER OF YOU,
Ipsos / Why distinctive
brand assets are
a driving force of
creative effectiveness
/ By Adam Sheridan,
February 2020

Figure 7 Average likelihood of an ad featuring different brand asset types being high vs. low performing on branded attention



Dynamics of TOM awareness, consumption and loyalty, 2022–2025

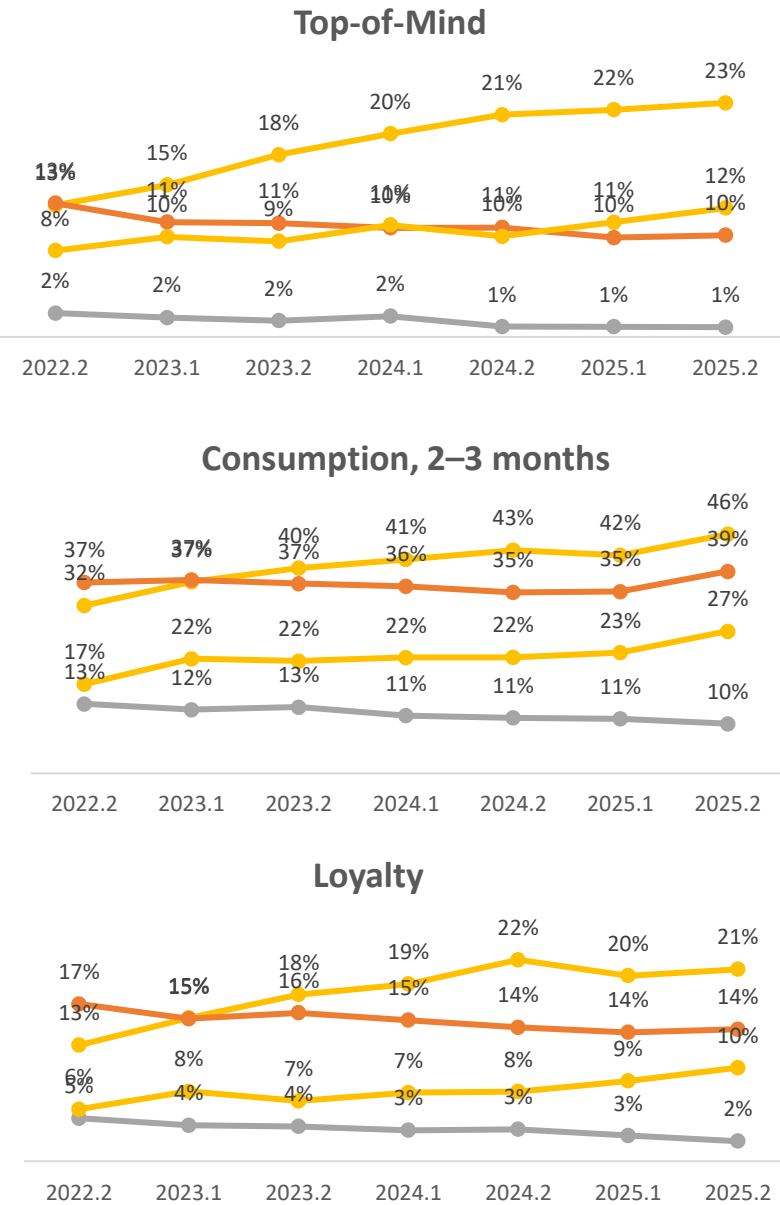


Chart 10

Funnel and Sales

Chart 11

Quarterly Market Share Dynamics, 2022–2025

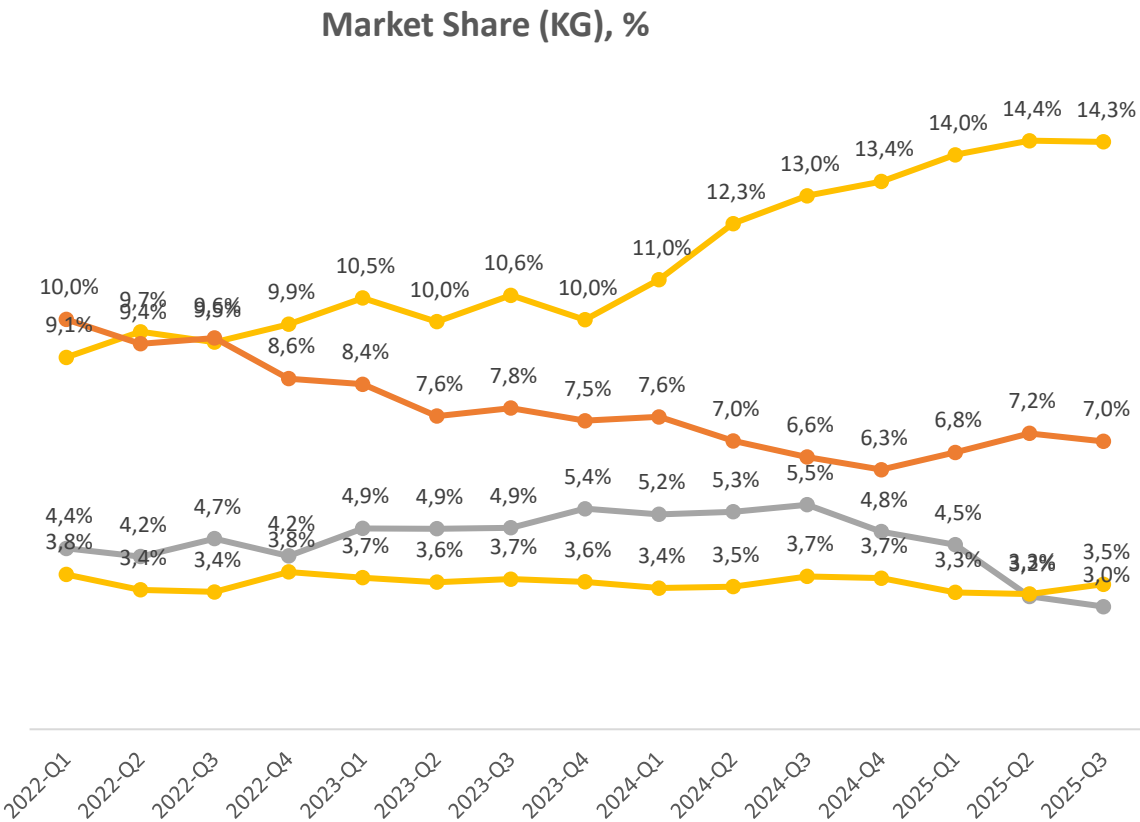
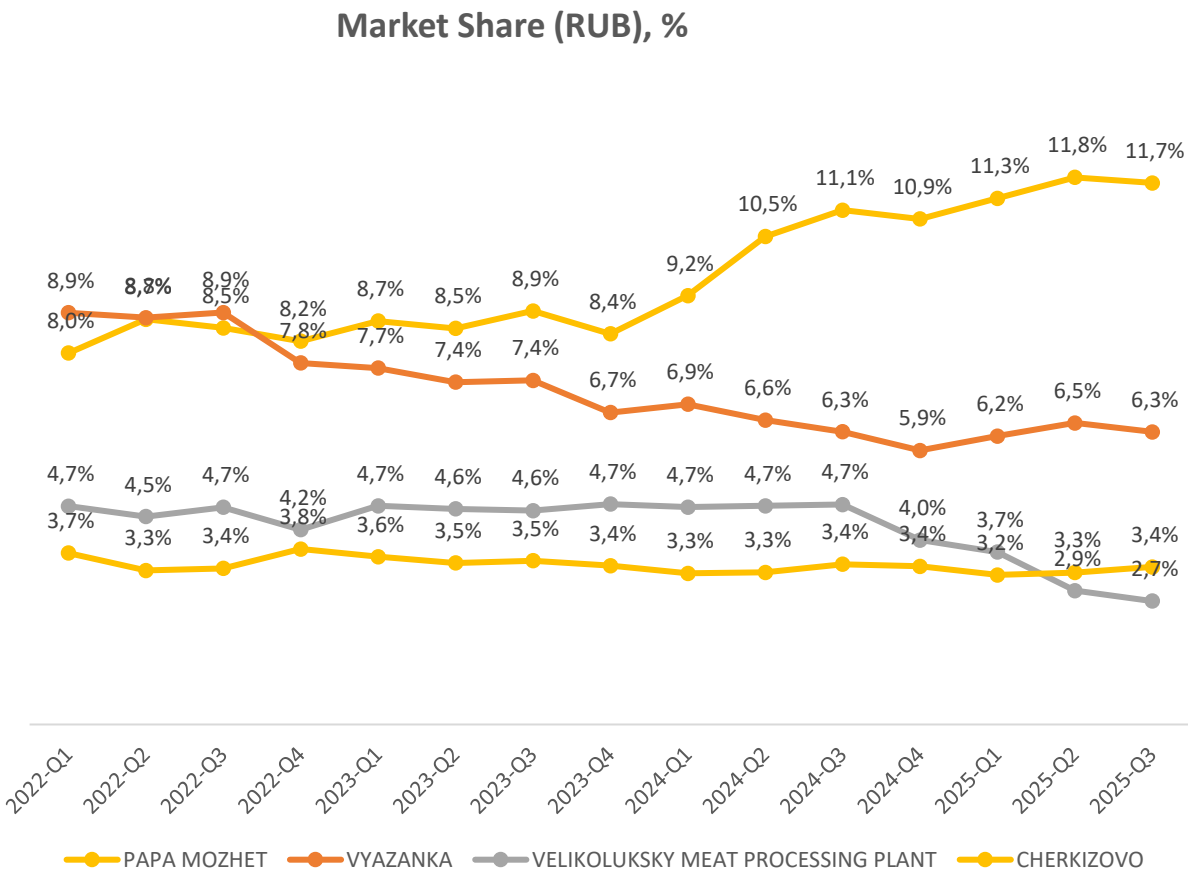


Chart 12

Advertising Effectiveness, Cope Tracker Insight Expert, 2023-2025
Recall, Brand Attribution, Appeal

Ad Effectiveness
2023

Ad Effectiveness
2024

Ad Effectiveness
2025

Papa Mozhet, Advertising Effectiveness, 2023–2025

	Sandwich, 2023	Train, 2023	Restaurant, 2024	Hot Dog, 2025	Papa Mozhet Average
Recall	77%	69%	87%	80%	78%
Attribution	84%	72%	89%	87%	83%
Liking	71%	71%	81%	69%	73%

Competitors, Advertising Effectiveness, 2023–2025

	Starodvorie, Sochinki	Starodvorie, Myasorubsky	Starodvorie, Sochinki Bavarian Style	Starodvorie, Bavarushka	Vyazanka, Slivushki	Cherkizovo	Delikaizer	Dym Dymych	Vladimirsky Standard	Klinsky	Starodvorie, Take One for Luck	Starodvorie, Myasorubsky Servelat	Vyazanka, Fileyskaya	Dym Dymych, Collect Your Set	Klinsky, Perfect Slices	Rublevsky, Moscow Brand	Starodvorie, Home-Style Food	Starodvorie, Pizza	Vyazanka, Agents	Cherkizovo, UFO	Cherkizovo, Felicita	Delikaizer, Supre-Samya	Klinsky, Taste in a Convenient Form	3-Year Competitor Average
	2023										2024						2025							
Recall	83%	73%	73%	65%	40%	32%	26%	24%	22%	20%	78%	78%	57%	26%	23%	18%	74%	68%	51%	48%	38%	37%	16%	47%
Attribution	52%	47%	38%	42%	40%	10%	4%	9%	1%	11%	41%	47%	43%	2%	7%	2%	44%	39%	27%	25%	16%	11%	4%	24%
Liking	71%	81%	76%	68%	64%	57%	57%	65%	57%	63%	78%	82%	79%	66%	62%	50%	80%	80%	66%	62%	60%	59%	51%	67%