



NEW CHALLENGES
NEW SOLUTIONS

**PRICE TAKES PRIORITY
FOR RUSSIAN SHOPPERS
IN CHOOSING EVERYDAY
GOODS, PRIVATE LABELS
AND NEW PRODUCTS**

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INTRODUCTION

Over the past four years, B1 Group has surveyed Russian consumers every six months to track the latest trends shaping perceptions of the consumer goods market in Russia, as well as evolving purchasing behavior. Since autumn 2022, we have completed seven waves of research, analyzing how consumers have adapted to market changes and how their preferences have shifted over time.

To validate previously identified trends and uncover emerging ones, we conducted the eighth wave of research in March 2026, gathering insights from over 1,000 active Internet users in Russia.

We are pleased to present our findings in this report.

KEY FINDINGS AND INSIGHTS

1 WHILE PRICE AND QUALITY REMAIN THE DOMINANT DRIVERS OF CONSUMER CHOICE, THE RELEVANCE OF ONLINE SHOPPING WITH DELIVERY IS GROWING STEADILY

Price and quality lead by a wide margin over other factors, cited by 92% and 81% of respondents, respectively. The closest factor to these top priorities is the availability of online shopping with delivery, which has increased by 11% over the past six months, reaching 35%.

2 LEADING SALES CHANNELS HAVE FURTHER CEMENTED THEIR DOMINANCE OVER THE PAST SIX MONTHS

Consumers have increasingly reported purchasing food products in large retail chains, with the share of shoppers using such stores rising by 3% on average across all categories. Six months ago, interest in local convenience stores surged; however, this trend has since reversed, with their share of shopping declining. The shift is partly driven by slower expansion in the format, with net store openings falling to 952 in 2025 from 5,660 a year earlier, according to INFOline.

Marketplaces have emerged as a key channel for purchasing all non-food categories. Their appeal continues to expand into areas traditionally dominated by specialized retail, such as furniture and home décor.

3 CONSUMERS ARE GENERALLY OPEN TO TRYING NEW PRODUCTS, YET PRICE REMAINS THE KEY DECISION DRIVER

An attractive price is the top motivator for buying new products, cited by 63% of respondents. The opportunity to simply try something new sparks interest among 54% of respondents, while 51% are drawn by the prospect of experiencing new flavors in familiar products.

4 CONSUMERS CONTINUE TO TIGHTEN SPENDING, BUT THE APPETITE FOR SAVING HAS REMAINED BROADLY STABLE

Key indicators of frugal behavior have shown only marginal changes since the previous study. The share of respondents aiming to make fewer impulse purchases has declined by 4%, while those carefully planning major purchases has dropped by 2%, and those seeking out promotional offers has fallen by 1%. As in the previous survey period, 28% of respondents plan to make big-ticket purchases over the next six months.

Interestingly, respondents aged 55+ and 45–54 are now less likely to forgo impulse purchases. The share of consumers reporting a reduction in such purchases has declined by 9% and 10%, respectively. By contrast, younger consumers are becoming more cost-conscious: over the past six months, the proportion of respondents cutting back on impulse spending and planning purchases more carefully has increased by 6%.

5 INTEREST IN FOOD AND NON-FOOD PRIVATE LABELS HAS STAYED FLAT OVER THE PAST SIX MONTHS, WHILE LOWER PRICES AT COMPARABLE QUALITY CONTINUE TO DRIVE CONSUMER CHOICE

According to 54% of respondents, price is the main reason for choosing private labels over branded alternatives.

Consumer interest in private label products has shown little change across most food categories, ranging from 33% for fresh and processed meat, fish and poultry to 49% for dairy products. In the non-food space, however, adoption of private label products has declined over the past six months, with the sharpest drop recorded in clothing, footwear and accessories (from 34% to 13%) and the smallest decline observed in more brand-agnostic categories such as home cleaning and laundry supplies (from 47% to 40%).

6 CONSUMER EXPECTATIONS ARE SIMILAR TO THOSE IN 2023, WITH MOST RESPONDENTS STILL NOT ANTICIPATING SIGNIFICANT SHIFTS IN THE AVAILABILITY OF GOODS AND SERVICES

With the exception of younger demographics, all age groups continue to expect stable supply of goods and services. Interestingly, while younger respondents (aged 18–24 and 25–34) previously showed the most optimistic expectations, by spring 2026 these same groups had become the most pessimistic in their outlook.

7 GROCERY SHOPPING FREQUENCY IN OFFLINE STORES HAS SEEN VIRTUALLY NO CHANGE

Over the past six months, the frequency of in-store grocery shopping has remained broadly stable. The share of respondents making purchases several times a week has increased slightly, reaching 57% in spring 2026.

This trend is consistent across all types of localities covered by the survey.

From a frequency perspective, visits to offline retail formats have shown no significant change since autumn 2025, with around half of respondents reporting that they visit their usual stores as often as before. Supermarkets and convenience stores demonstrate the strongest gains in engagement, even as the pace of new convenience store openings slowed. Hypermarkets and traditional retail outlets, by contrast, are visited less often or at roughly the same frequency by around half of consumers.

8 MOST CONSUMERS RESPOND POSITIVELY TO PERSONALIZED OFFERS

Over half of respondents view personalized promotions favorably, with 20% already converting them into purchases and a further 13% indicating willingness to do so. The strongest driver is a more attractive price compared with shelf pricing: 31% of consumers say they would be interested in a personalized offer if it provides a clear price advantage.

9 TWO-THIRDS OF RESPONDENTS DO NOT USE AI AS A SHOPPING ASSISTANT

At 69%, the majority of respondents do not use AI when making purchases. The gap between the youngest (18–24) and oldest (55+) age groups is just 9%, indicating that even the most tech-savvy younger shoppers remain relatively cautious in adopting AI. This presents an opportunity for retailers to further educate consumers and promote AI as a practical companion in the shopping experience.

AI functionality in shopping extends beyond a single use case. Consumers can leverage it as a dynamic information hub—from discovering products and comparing features to reading reviews, finding more affordable alternatives, and even reducing reliance on in-store staff for basic inquiries.

WHILE PRICE AND QUALITY REMAIN THE DOMINANT DRIVERS OF CONSUMER CHOICE, THE RELEVANCE OF ONLINE SHOPPING WITH DELIVERY IS GROWING STEADILY

Price and quality continue to lead as the top drivers with only minor fluctuations of 1%–3% over the past two years.

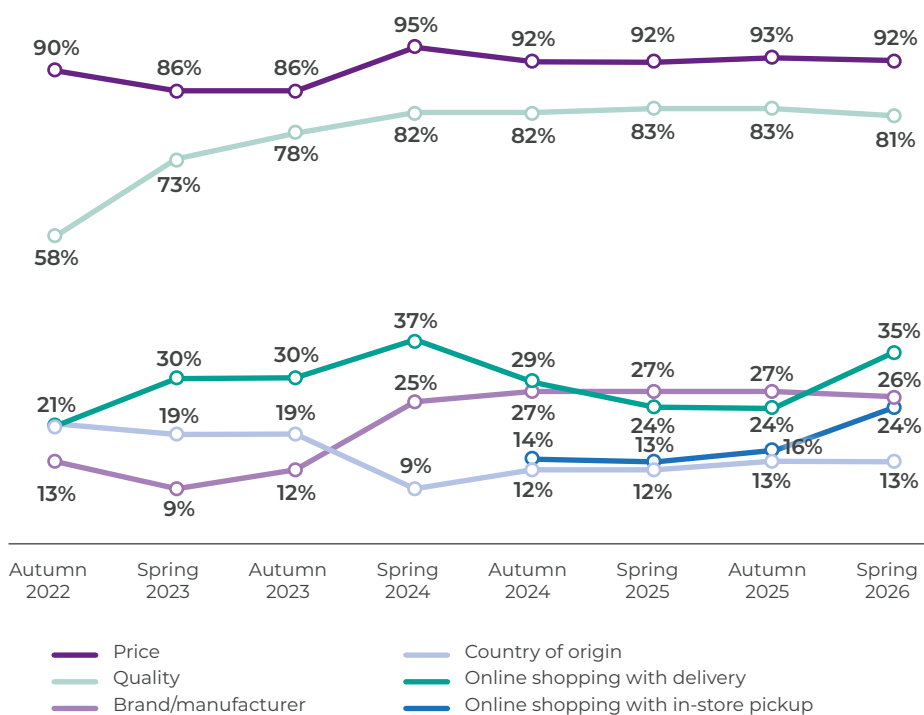
At the same time, online shopping with delivery is becoming an increasingly important factor in purchasing decisions. The share of respondents valuing home delivery has increased by 11% over the past six months, while demand for online purchase with in-store pickup has risen by 8%. This trend is likely driven by growing time constraints among shoppers, as well as the greater availability of delivery and click-and-collect services across retail formats.

Interest in online shopping with delivery has become more widespread across all income groups.

Among female respondents, 41% highlight the importance of home delivery, while a further 27% value the option of in-store pickup. For men, home delivery also remains relevant—ranked at 29%—on par with brand preference (28%).

WHAT ARE THE KEY DRIVERS OF YOUR PURCHASING DECISION?

Select all that apply



For residents of Moscow and St. Petersburg, online shopping options are more important than for consumers in other cities, with 42% valuing delivery and 27% valuing click-and-collect. In comparison, the figures are 32% and 24% in million-plus

cities, and 34% and 23% in smaller urban areas. Moreover, for urban dwellers in the capital cities, the availability of delivery or click-and-collect is more important than brand, which is cited by 24% of respondents in Moscow and St. Petersburg.



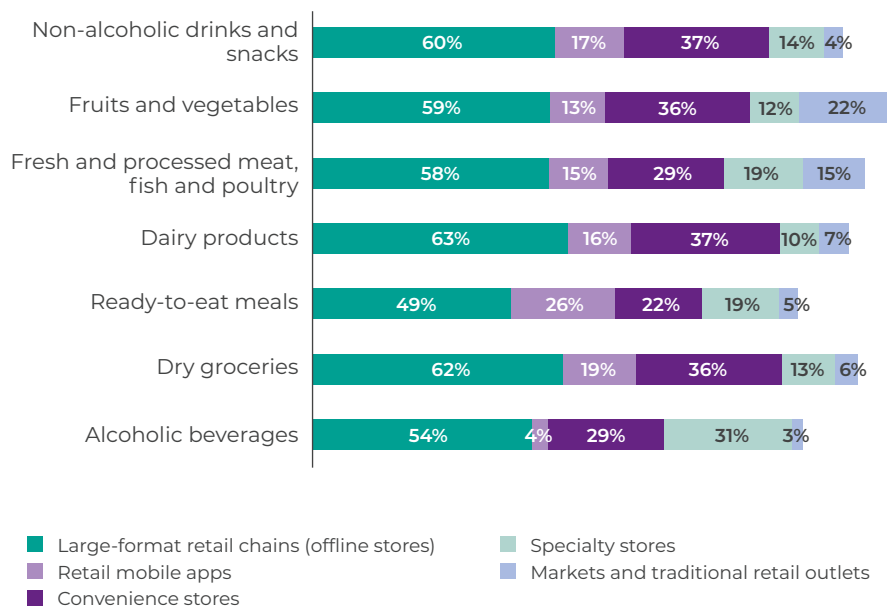
LEADING SALES CHANNELS HAVE FURTHER CEMENTED THEIR DOMINANCE OVER THE PAST SIX MONTHS

Large retail chains remain the most preferred offline channel for grocery shopping. In spring 2026, their share grew across all food categories compared with autumn 2025, with the strongest increase seen in fruits and vegetables (+5%), reflecting typical seasonal effects, and the weakest, in alcoholic beverages (+1%).

While the previous survey showed a surge in interest in convenience stores, their share has since declined slightly across all categories. This is partly attributable to weaker expansion in the format, with net store openings in 2025 totaling 952 compared with 5,660 a year earlier, according to INFOline.

WHERE DO YOU TYPICALLY SHOP FOR FOOD?

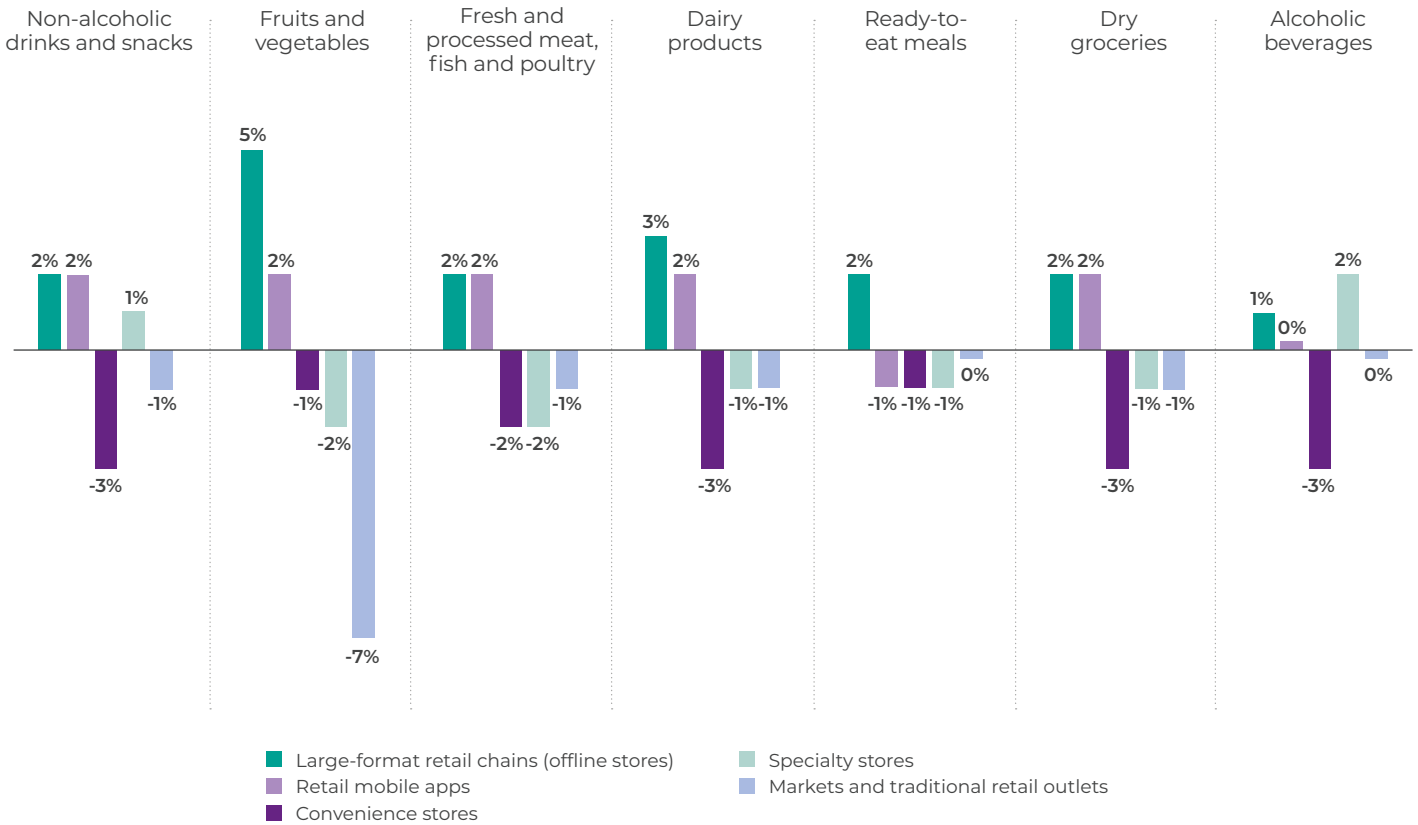
Select all that apply



WHERE DO YOU TYPICALLY SHOP FOR FOOD?

CHANGES FROM AUTUMN 2025 TO SPRING 2026

Select all that apply



Meanwhile, interest in purchasing groceries via mobile apps remains stable, with consumers most frequently using them to order ready-to-eat meals (26%).

Marketplaces have emerged as a key channel for purchasing all non-food categories. Their appeal continues to expand into areas traditionally dominated by specialized retail, such as furniture and home décor.

WHERE DO YOU TYPICALLY SHOP FOR NON-FOOD ITEMS?

Select all that apply



WHERE DO YOU TYPICALLY SHOP FOR NON-FOOD ITEMS?

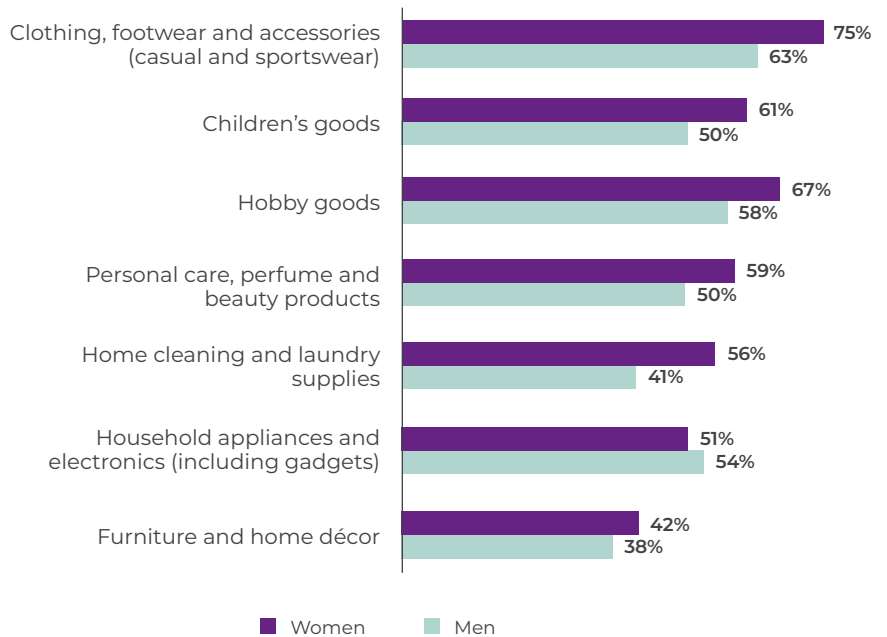
CHANGES FROM AUTUMN 2025 TO SPRING 2026

Select all that apply



Women show particularly high engagement with marketplaces, with the exception of the household appliances and electronics segment. Gender gaps in non-food marketplace purchases are most evident in home cleaning and laundry supplies, clothing, and children's goods, where the share of women exceeds that of men by 15%, 12% and 11%, respectively.

WHERE DO YOU TYPICALLY SHOP FOR NON-FOOD ITEMS? MARKETPLACES



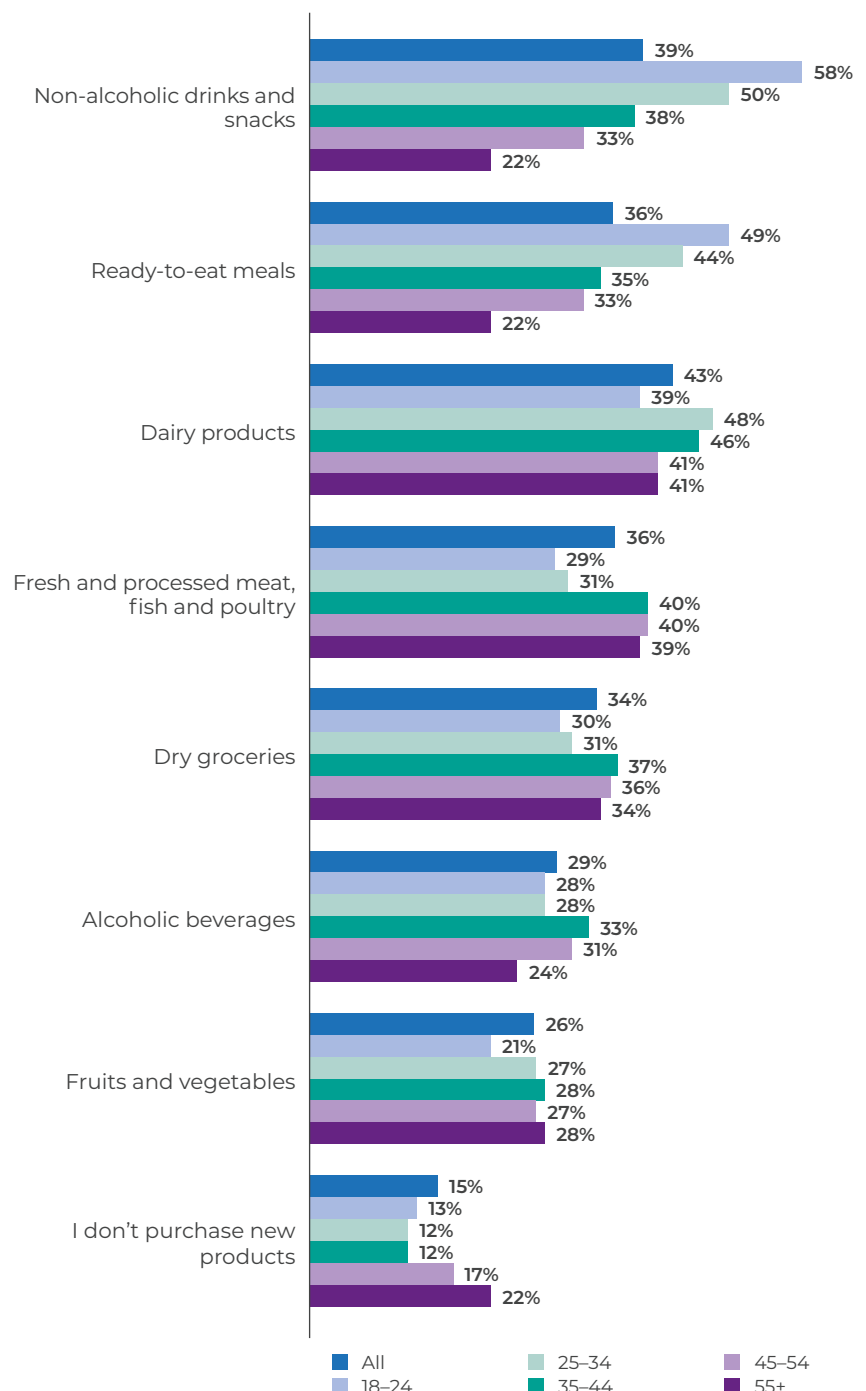
CONSUMERS ARE GENERALLY OPEN TO TRYING NEW PRODUCTS, YET PRICE REMAINS THE KEY DECISION DRIVER

The vast majority of consumers are willing to purchase new products, with only 15% stating the opposite. Interest in novelty is highest in the dairy category (43%) and lowest in fruits and vegetables (26%).

Older consumers (55+) are more conservative, with 22% not adopting new products. Among younger age groups, this share is lower: 12% for consumers aged 35–44 and 25–34, and 13% among those aged 18–24. Younger shoppers (18–24) are most likely to experiment in categories like ready-to-eat meals (49%) and non-alcoholic drinks and snacks (58%), while older generations show stronger interest in new dairy products and fresh and processed meat, fish and poultry.

IN WHICH FOOD CATEGORIES WOULD YOU BE WILLING TO TRY NEW PRODUCTS?

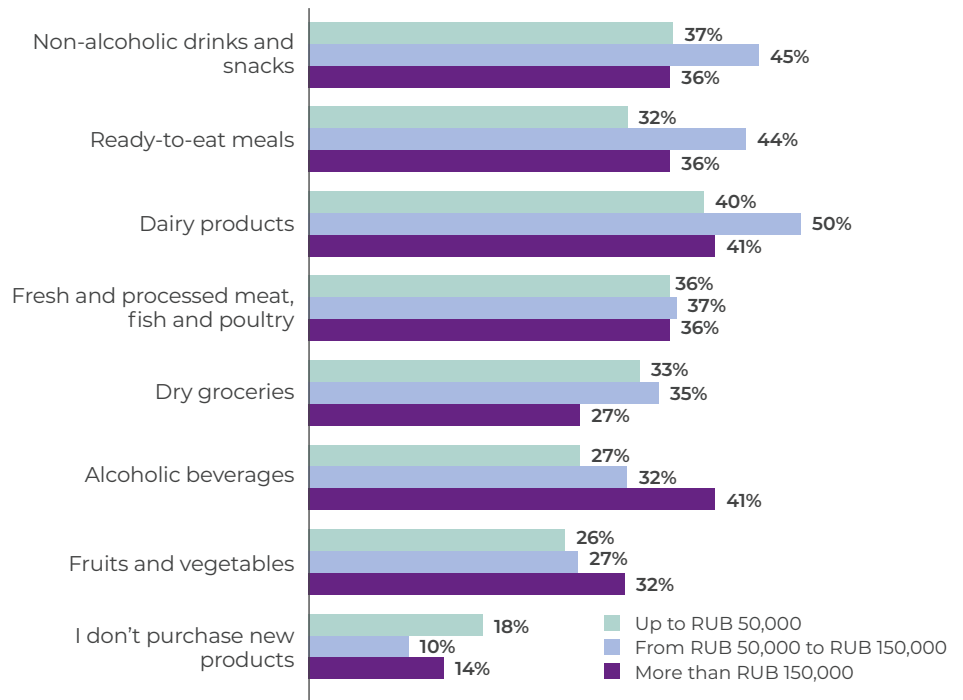
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IN WHICH FOOD CATEGORIES WOULD YOU BE WILLING TO TRY NEW PRODUCTS?

Select all that apply

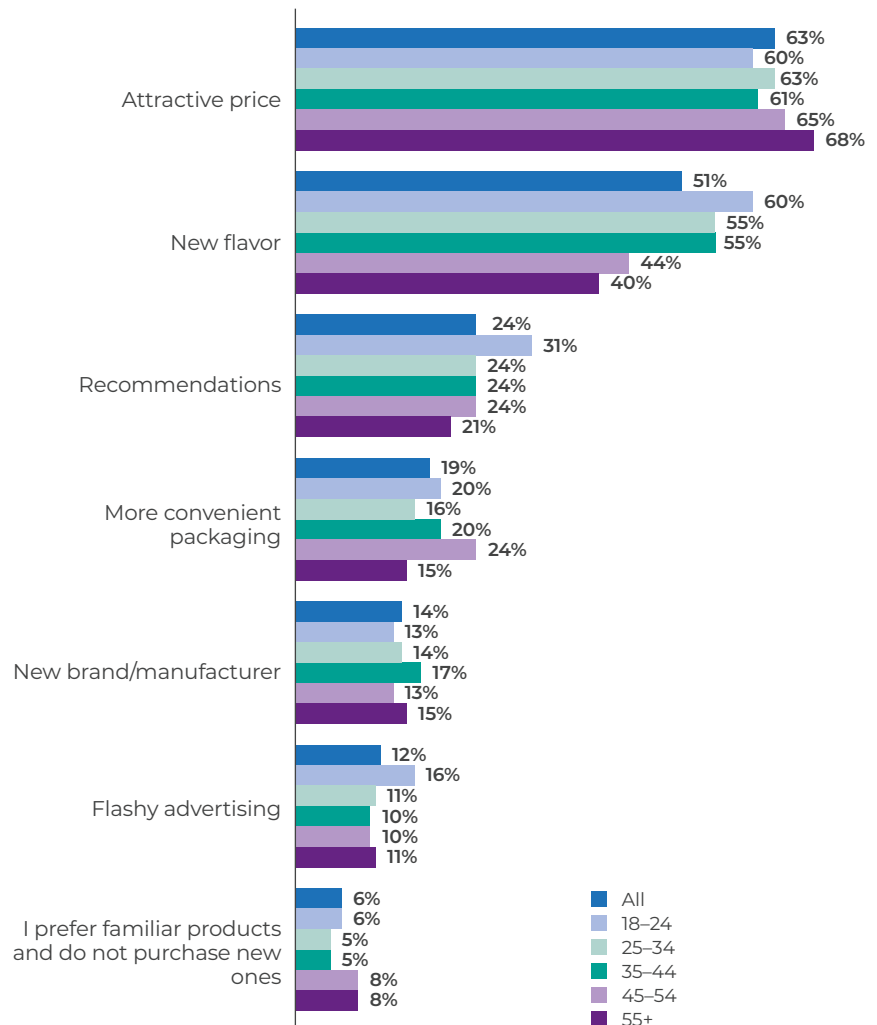


Middle-income consumers demonstrate the strongest willingness to purchase new products in dairy (50%), non-alcoholic drinks and snacks (45%), and ready-to-eat meals (44%). By contrast, the lowest earners are more hesitant, with 18% preferring not to experiment at all.

An attractive price is the top motivator for buying new products, cited by 63% of respondents. More than half of respondents also say they are generally interested in trying something new, a factor that is particularly popular with younger consumers: 65% of respondents aged 18–24 selected this option as their main reason, closely followed by 'new flavor' (60%) in the same age group. In general, consumers tend to be skeptical of flashy advertising, with only 12% and 14%, respectively, indicating a willingness to purchase a new product simply because it was heavily advertised or associated with a new brand.

WHAT FACTORS COULD MOTIVATE YOU TO CHOOSE A NEW PRODUCT INSTEAD OF FAMILIAR OPTIONS?

Select all that apply





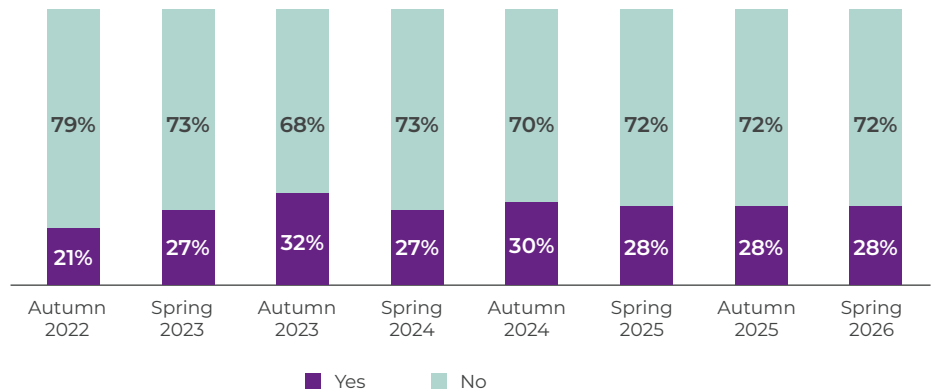
CONSUMERS CONTINUE TO TIGHTEN SPENDING, BUT THE APPETITE FOR SAVING HAS REMAINED BROADLY STABLE

Key indicators of frugal behavior have shown only marginal changes since the previous study. Over the past one and a half years, 72% of consumers have consistently reported that they do not plan to make major purchases.

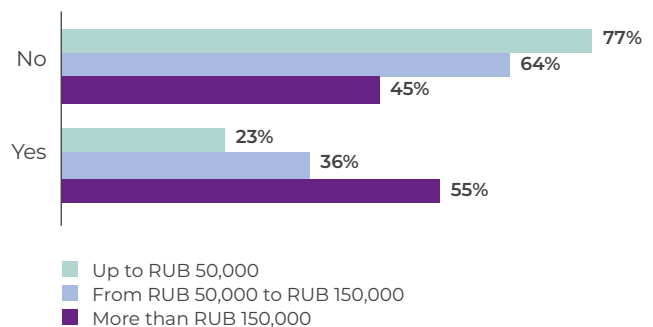
In spring 2026, 46% of respondents stated they have not bought and do not plan to buy big-ticket items, while 26% have already made such purchases and do not intend to make new ones.

Among high-income consumers, the majority (55%) plan big-ticket purchases, in contrast to lower-income groups (23% among those earning up to RUB 50,000 per family member and 36% among those earning RUB 50,000–150,000). This income-based divide has remained stable for the past 18 months.

ARE YOU PLANNING BIG-TICKET PURCHASES IN THE NEXT SIX MONTHS?



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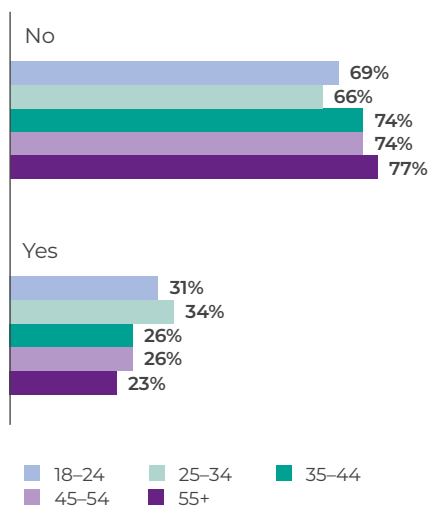


Age also shapes spending behavior, with younger adults aged 25–34 being most likely to plan big-ticket purchases (34%). Among those aged 55+, this figure stands at 23%, the lowest across the board.

While overall frugality remains steady, some shifts are emerging. The share of respondents aiming to make fewer impulse purchases has declined by 4% over the past six months, while those carefully planning major purchases has dropped by 2%, and those seeking out promotional offers has fallen by 1%.

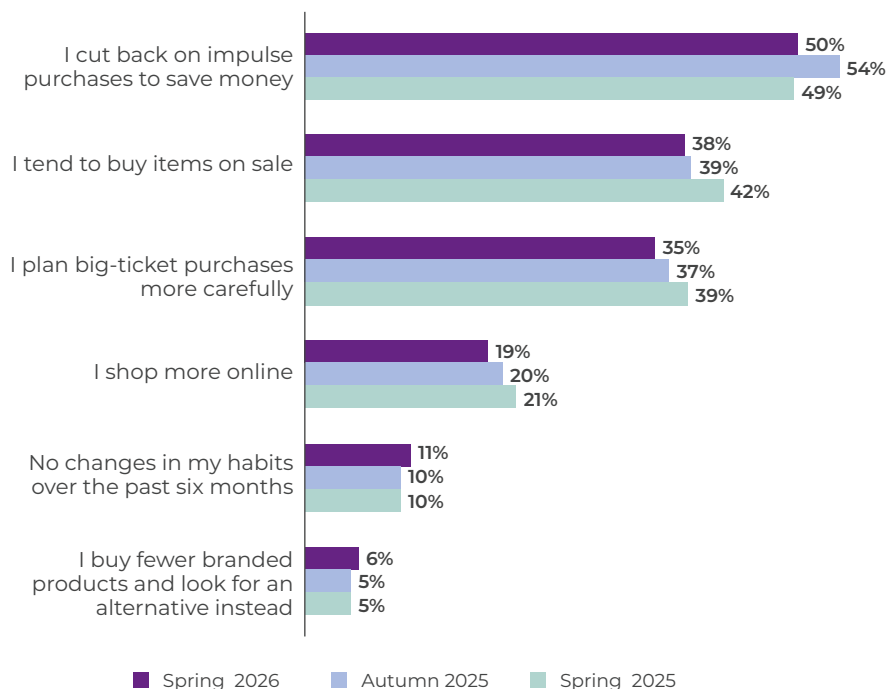
Interestingly, respondents aged 55+ and 45–54 are now less likely to forgo impulse purchases. The share of consumers cutting back on impulse purchases has declined by 9% and 10%, respectively. By contrast, younger consumers (aged 18–24) have become more cost-conscious, with 66% reporting fewer impulse purchases and 39% planning their spending more carefully, up 6% from autumn 2025.

ARE YOU PLANNING BIG-TICKET PURCHASES IN THE NEXT SIX MONTHS?



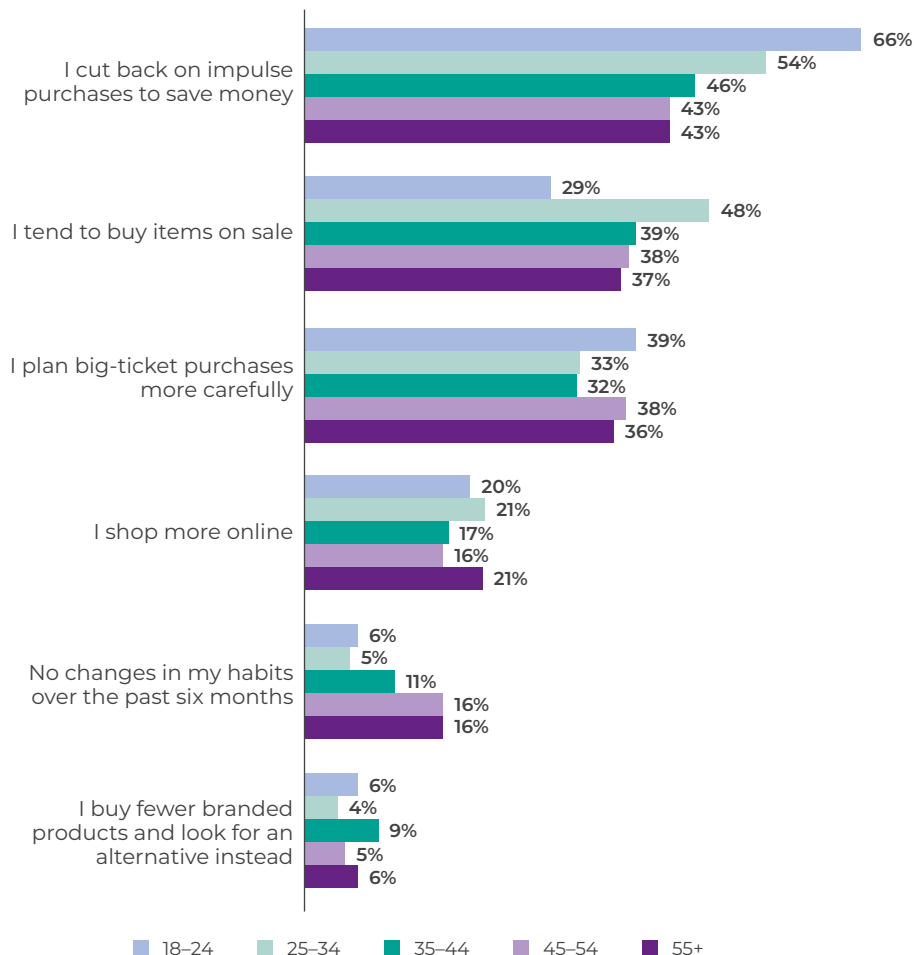
HOW HAVE YOUR CONSUMER HABITS CHANGED OVER THE PAST SIX MONTHS?

Select all that apply



HOW HAVE YOUR CONSUMER HABITS CHANGED OVER THE PAST SIX MONTHS?

Select all that apply



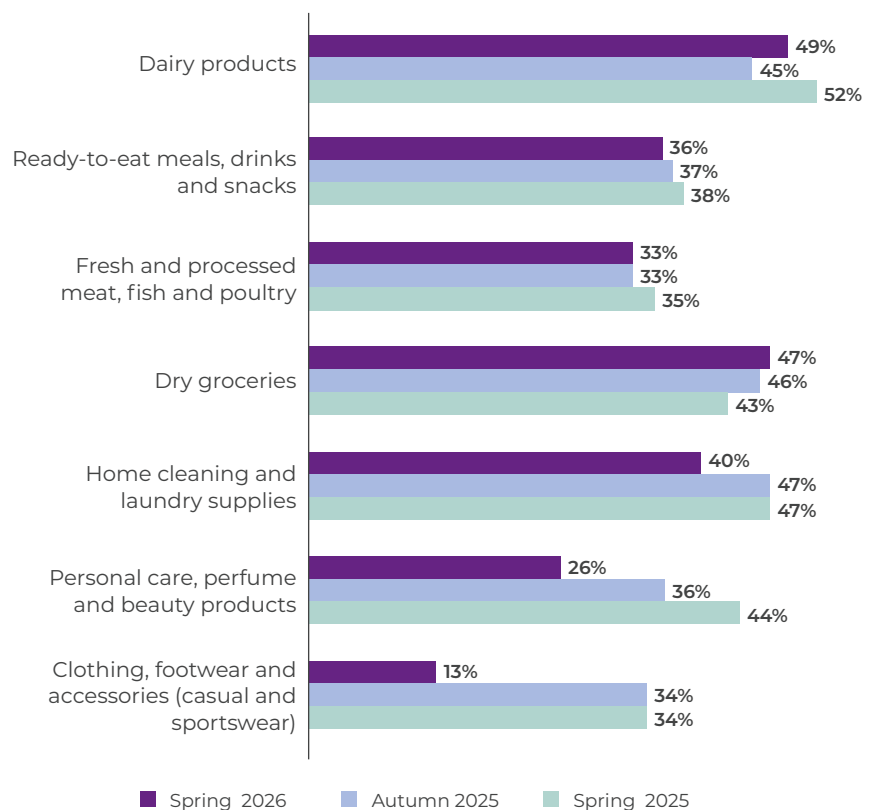
INTEREST IN FOOD AND NON-FOOD PRIVATE LABELS HAS STAYED FLAT OVER THE PAST SIX MONTHS, WHILE LOWER PRICES AT COMPARABLE QUALITY CONTINUE TO DRIVE CONSUMER CHOICE

Consumer interest in food private labels has remained virtually unchanged over the past six months. Growth dynamics in the private label segment mirror those of the broader grocery retail market: according to Nielsen,¹ the growth rate of private label food categories decelerated from 22% in 2024 to 17% in 2025. 'Dry groceries' stands out as the only food category with consistently rising consumer interest—up 7% since autumn 2024 across four survey waves.

Meanwhile, interest in non-food private labels has declined across all categories.

IN WHICH CATEGORIES DO YOU BUY PRIVATE LABEL PRODUCTS?

Select all that apply



¹ Nielsen. 2025 Results and the Market Outlook for 2026, p. 33, <https://n-df.ru/vebinar-nilsen-itogi-2025-goda>

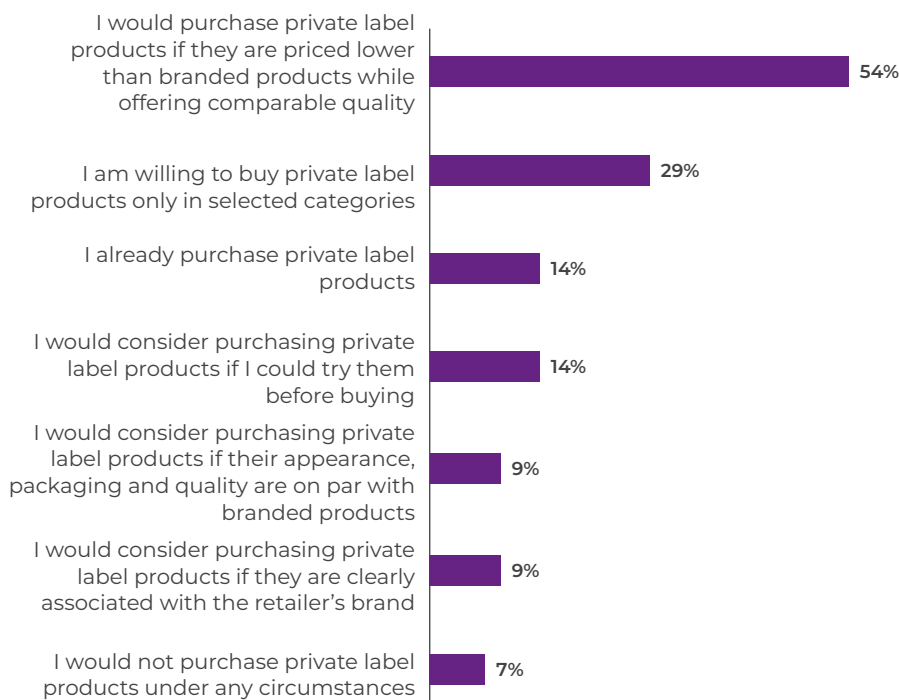


The most pronounced decrease was observed in clothing and footwear (-21% over the past six months), while declines in home cleaning and laundry supplies (-7%) and personal care, perfume and beauty products (-10%) were more moderate. Sales dynamics reflect a similar trend, with Nielsen¹ reporting that growth in non-food private label sales slowed from 16% in 2024 to 7% in 2025.

Private labels already account for 15% of food retail turnover and 13% of non-food sales.¹ Looking ahead, growth is likely to be driven primarily by lower prices relative to branded alternatives. More than half of respondents (54%) stated they would be willing to purchase private label products, provided they are priced below branded equivalents while offering comparable quality. However, lower prices alone are not sufficient across all categories: one-third of respondents emphasized that their choice depends on the product category.

WHAT WOULD MAKE YOU CHOOSE PRIVATE LABEL PRODUCTS OVER BRANDED ALTERNATIVES?

Select all that apply



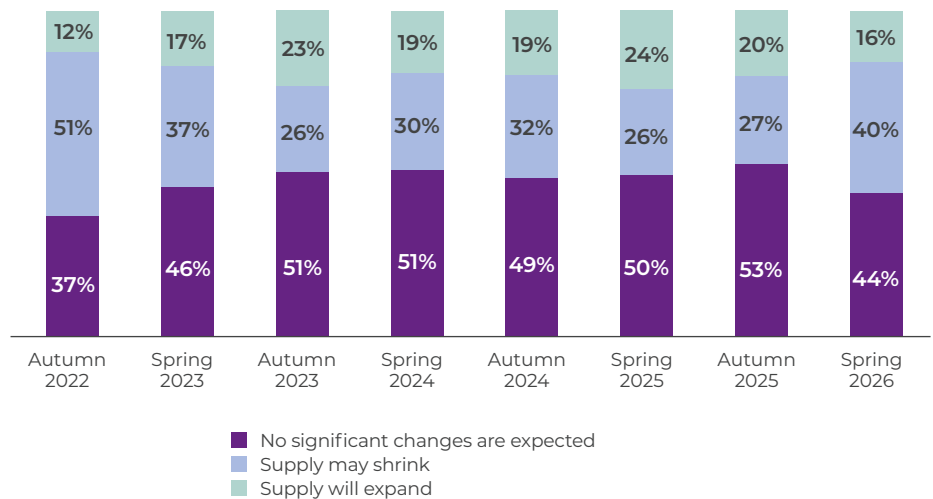
For example, consumers with incomes above RUB 150,000 are generally unwilling to buy private-label clothing, footwear or accessories. While price

remains the dominant driver, a further 14% of respondents said they would be more likely to purchase a private label product if they could try it before buying.

CONSUMER EXPECTATIONS ARE SIMILAR TO THOSE IN 2023, WITH MOST RESPONDENTS STILL NOT ANTICIPATING SIGNIFICANT SHIFTS IN THE AVAILABILITY OF GOODS AND SERVICES

With the exception of younger demographics, most age groups continue to expect stability in access to goods and services. Interestingly, while younger respondents (aged 18–24 and 25–34) previously showed the most optimistic expectations, by spring 2026 these same groups had become the most pessimistic in their outlook.

HOW DO YOU THINK THE AVAILABILITY OF YOUR USUAL GOODS AND SERVICES WILL CHANGE OVER THE NEXT YEAR?



GROCERY SHOPPING FREQUENCY IN OFFLINE STORES HAS SEEN VIRTUALLY NO CHANGE

Over the past year, the share of consumers purchasing grocery items several times a week has gradually increased, reaching 57% in spring 2026, while other response options have declined compared with spring 2025. These shifts reflect a broader consumer move towards faster, more convenient shopping, driven by the desire for product freshness and the ability to treat oneself with satisfying purchases.

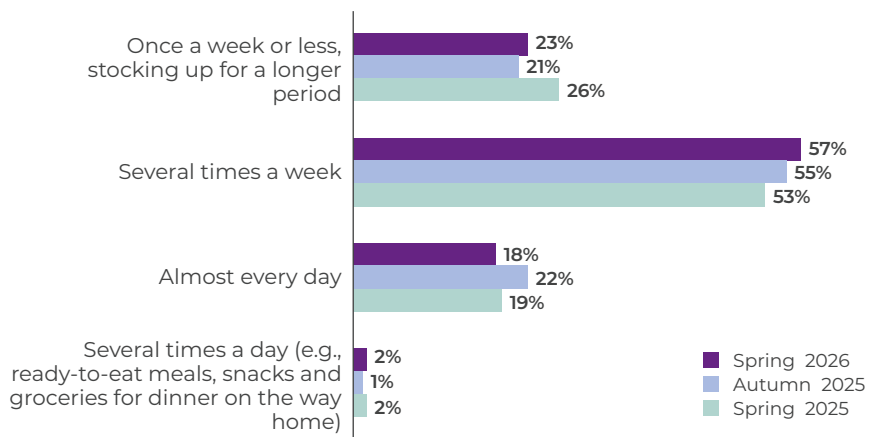
The trend towards shopping several times a week is consistent across all settlement sizes included in the study.

Consumers with lower incomes (up to RUB 50,000 per household member) are more likely to stock up on groceries for longer periods—accounting for 24% of this group, compared with just 14% among those earning over RUB 150,000.

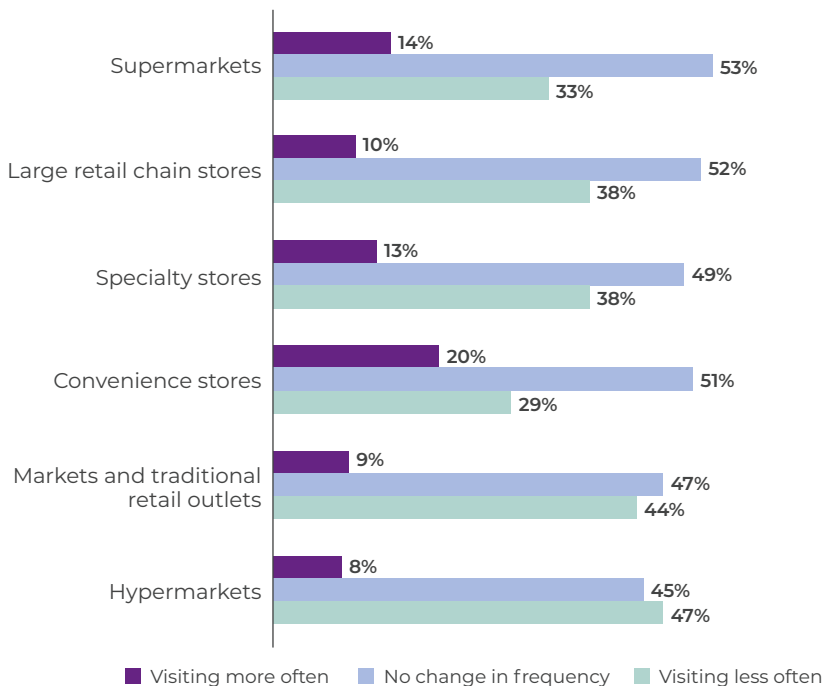
The overall pattern of visiting offline stores remains stable: most consumers have not altered their shopping routines. One exception is hypermarkets, where the share of consumers reporting reduced shopping frequency exceeds the share of those whose shopping frequency has remained unchanged.

HOW OFTEN DO YOU SHOP FOR FOOD DURING THE WEEK?

Select all that apply



HOW HAS YOUR FREQUENCY OF VISITING DIFFERENT STORE FORMATS TO PURCHASE GROCERIES CHANGED OVER THE PAST SIX MONTHS?

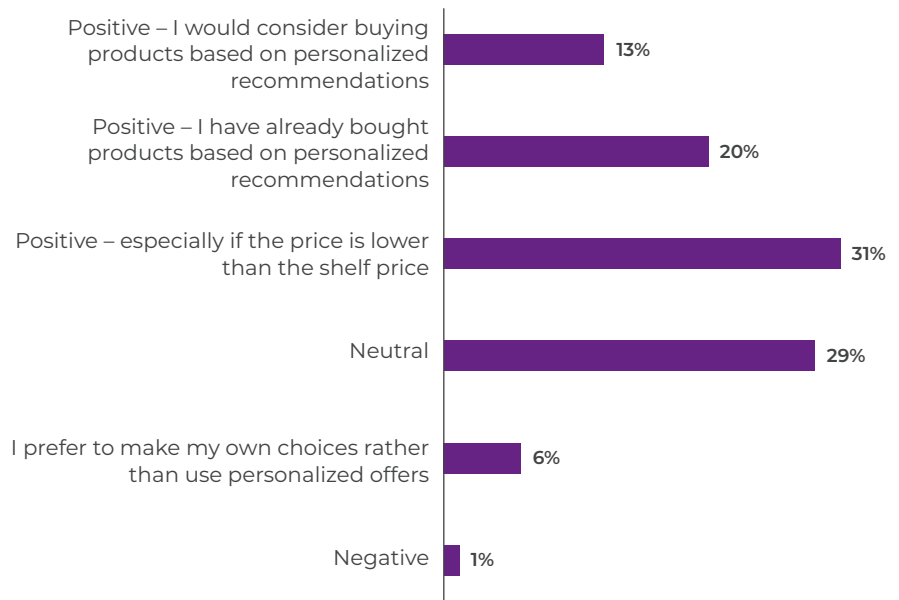


MOST CONSUMERS RESPOND POSITIVELY TO PERSONALIZED OFFERS

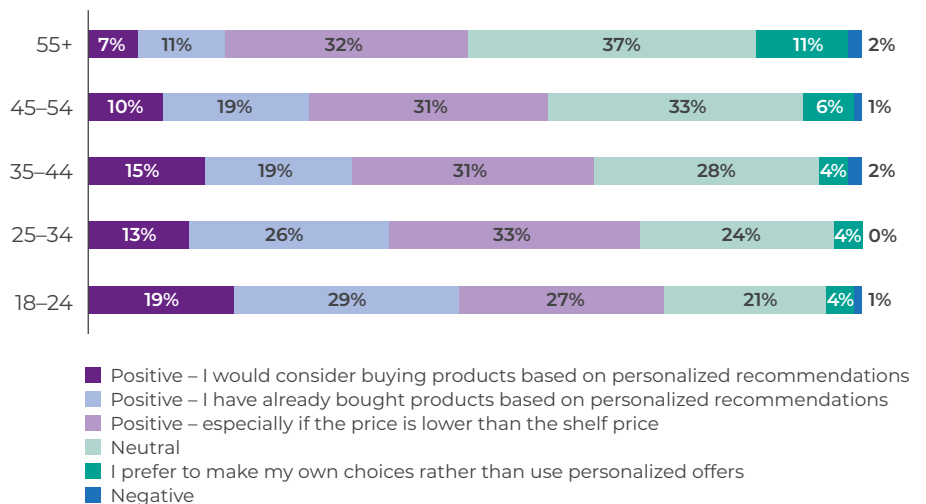
Over half of respondents view personalized promotions favorably, with 20% already converting them into purchases and a further 13% indicating willingness to do so. The strongest driver is a more attractive price compared with shelf pricing: 31% of consumers say they would be interested in a personalized offer if it provides a clear price advantage.

Personalized offers see the highest uptake among younger consumers (aged 18–24 and 25–34), with 29% and 26%, respectively, having already made purchases through such offers. Older age groups are generally neutral to positive towards personalized recommendations, as long as the recommended product is offered at a lower price than the shelf price.

HOW DO YOU FEEL ABOUT PERSONALIZED PRODUCT OFFERS?



HOW DO YOU FEEL ABOUT PERSONALIZED PRODUCT OFFERS?



TWO-THIRDS OF RESPONDENTS DO NOT USE AI AS A SHOPPING ASSISTANT

Sixty-nine percent of consumers still do not use AI when making purchases. Strikingly, low adoption spans all age groups, with only a 9% gap between the youngest (18–24) and oldest (55+) respondents: 63% and 72%, respectively, report not using AI.

Consumers do, however, engage with new technologies in a variety of use cases, primarily at the product selection stage. Specifically, 16% use AI to compare product characteristics, 14% to search for suitable options, 11% to read reviews, and 9% to look for cheaper alternatives. This indicates an underlying interest in leveraging technology to access product information and comparisons, highlighting an opportunity for retailers to further develop AI assistant functionality.

DO YOU USE AI WHEN MAKING PURCHASES?

Select up to three answers





CONCLUSION



PRICE AND QUALITY REMAIN THE PRIMARY CRITERIA WHEN SELECTING PRODUCTS ACROSS ALL CATEGORIES, WHILE ALL OTHER FACTORS ARE LARGELY VIEWED AS SECONDARY.



IN FOOD PRODUCTS, **LARGE-FORMAT RETAIL CHAINS ARE GAINING POPULARITY, WHILE CONVENIENCE STORES REMAIN WIDELY USED** DESPITE A SLOWDOWN IN THEIR EXPANSION. IN NON-FOOD CATEGORIES, MARKETPLACES CONTINUE TO SHOW STRONG GROWTH IN IMPORTANCE.



CONSUMERS CONTINUE TO TIGHTEN SPENDING, BUT THE APPETITE FOR SAVING HAS REMAINED BROADLY STABLE OVER THE PAST SIX MONTHS.



CONSUMER EXPECTATIONS REGARDING FUTURE PRODUCT AND SERVICE AVAILABILITY ARE **SIMILAR TO THOSE IN 2023.** WITH THE EXCEPTION OF YOUNGER DEMOGRAPHICS, MOST AGE GROUPS DO NOT EXPECT SIGNIFICANT CHANGES IN AVAILABILITY.



INTEREST IN FOOD PRIVATE LABELS REMAINS STABLE, WHILE IT IS **DECLINING IN NON-FOOD CATEGORIES,** PARTICULARLY IN CLOTHING, FOOTWEAR AND ACCESSORIES.



CONSUMERS PREFER TO PURCHASE GROCERIES SEVERAL TIMES A WEEK, REGARDLESS OF THEIR PLACE OF RESIDENCE.



MOST CONSUMERS RESPOND POSITIVELY TO PERSONALIZED OFFERS. THE STRONGEST DRIVER OF INCREASED ENGAGEMENT IS A MORE ATTRACTIVE PRICE COMPARED WITH SHELF PRICING.



TWO-THIRDS OF RESPONDENTS DO NOT USE AI AS A SHOPPING ASSISTANT, ALTHOUGH WHEN IT IS USED, ITS FUNCTIONALITY IS NOT LIMITED TO A SINGLE USE CASE.

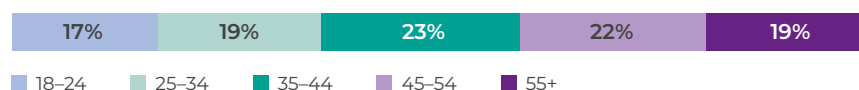
SURVEY DEMOGRAPHICS

WE SURVEYED **1,108 ACTIVE INTERNET USERS** FROM ACROSS RUSSIA, ALL AGED 18 AND OLDER.

GENDER



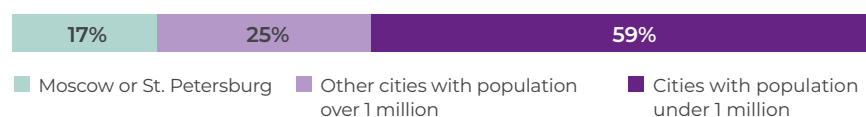
AGE



MONTHLY INCOME PER HOUSEHOLD MEMBER



PLACE OF RESIDENCE



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With over 35 years in Russia and more than 25 years in Belarus, we have built a strong team of professionals with diverse expertise and a wealth of experience in delivering the most challenging projects. B1 Group operates across 12 cities: Moscow, Minsk, Vladivostok, Ekaterinburg, Kazan, Krasnodar, Novosibirsk, Rostov-on-Don, Samara, St. Petersburg, Togliatti and Chelyabinsk.

Our mission is to help clients uncover innovative solutions, drive growth, transform their business and achieve success—all while boosting their financial resilience and nurturing talent.

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