



**Intesco  
Research  
Group**

# FRESH VEGETABLES AND RUSSIAN MARKET OF FRESH VEGETABLES



MOSCOW 2013

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**ABOUT INTESCO RESEARCH GROUP**

## RESEARCH METHODOLOGY

**Subject of research:**

RUSSIAN MARKET OF FRESH VEGETABLES

**Goal of research:**

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS  
DEVELOPMENT UNTIL 2020

**Regions of research:**

RUSSIA

REGIONS OF RF

**Basic units of research:**

WORLD MARKET

ANALYSIS OF RETAIL SALES

TRENDS ON RUSSIAN MARKET

FACTORS AFFECTING THE MARKET

STATE CONTROLLED MARKET

THE LARGEST PLAYERS ON THE MARKET

CULTIVATED AREAS

PRODUCTION

THE LARGEST RUSSIAN PRODUCERS

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IMPORT

PRODUCERS' PRICES

RETAIL PRICES

FORECAST OF DEVELOPMENT OF MARKET OF FRESH VEGETABLES UNTIL  
2020

PROFILES OF THE LARGEST PRODUCERS

**Information sources used:**

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Custom Service

Federal Tax Service

Evaluation of Experts of the Branch

Retail sales statements

Data of the main players of the branch

Printed and electronic publications of the branch

**The research contains 54 Schedules, 35 Diagrams, 33 Tables, 13 Schemes**

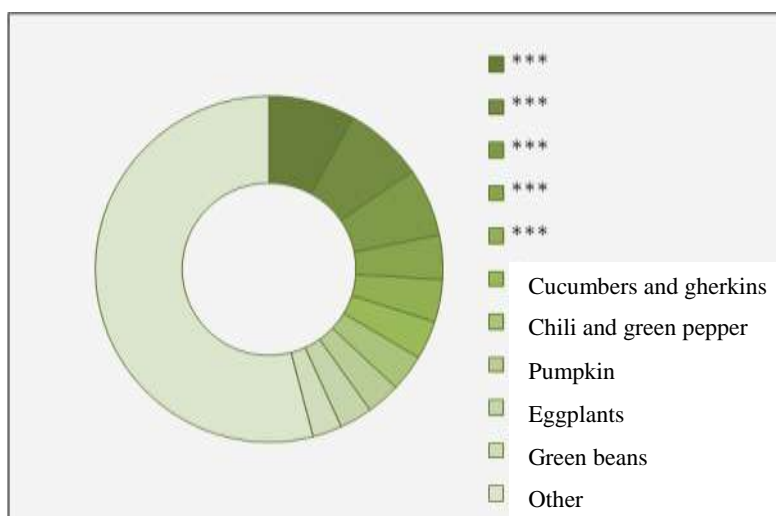
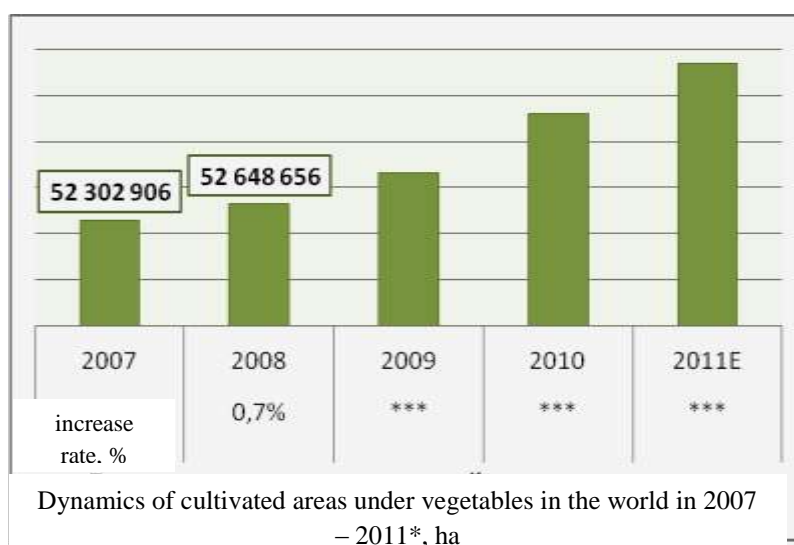


## EXTRACTS FROM THE RESEARCH

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## WORLD MARKET

Total cultivated areas under vegetables are growing by slow rates from year to year. Within the period researched the area grew by 6%. In 2011 the growth was equal to about 2%. In all more than 55 mln. ha is sown with vegetables in the world.



Dynamics of cultivated areas under vegetables in the world by types of vegetables in 2011, %

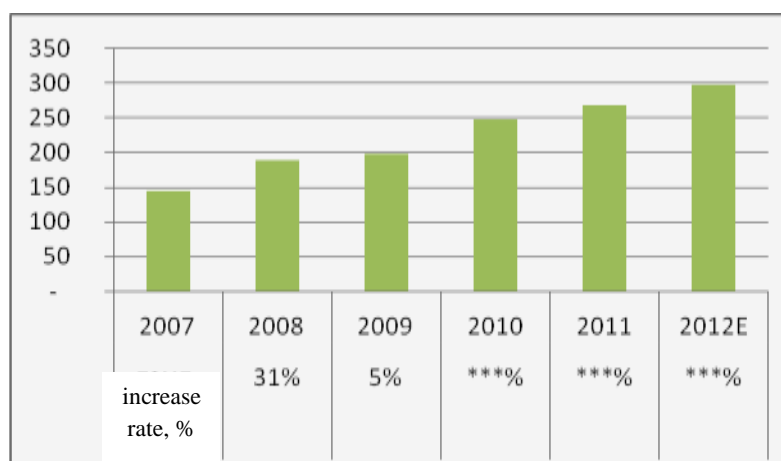
In 2010 the main vegetables were \*\*\*, \*\*\* and \*\*\*, with \*\*%, \*\*%, and \*\*% of the total area correspondingly. Area under cucumbers was equal to about \*\*% from the total value. Within the period researched structure of cultivated areas was stable and shares of vegetables did not change.

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Since 2007 retail sales of fresh vegetables have grown by \*\*%. The main growth was fixed in 2008 (+31%), \*\*\* (+\*\*%). According to forward estimates in 2012 volume of retail sales approached to \*\*\* bln. rubles.

Share of fresh vegetables in the structure of goods turnover remained approximately on the same level. It was changing in 2009 and 2010 due to change of well-being.

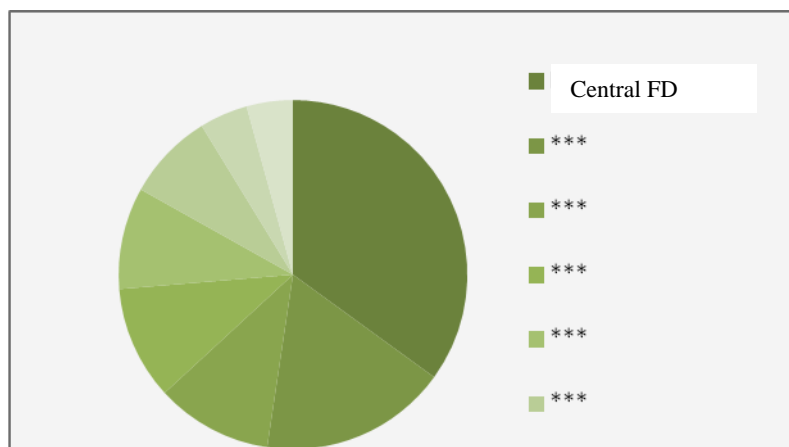


Dynamics of retail sales of fresh vegetables in 2007 – 2012\*, bln. rubles

A

According to the results of three quarters of 2012 Central FD was the leader by volume of retail sales, value of \*\*\* was twice as little. The smallest volume of fresh vegetables sales was fixed in North Caucasian Federal District, where the volume was \*\*\* times less than the volume of Central Federal District.

In the first three quarters of 2012 share of Central Federal District amounted to \*\*%, \*\*\*% more fell at \*\*\*. Shares of North Western Federal District and Ural Federal Districts amounted to \*\*\*% each. Shares of other districts were less than \*\*%.

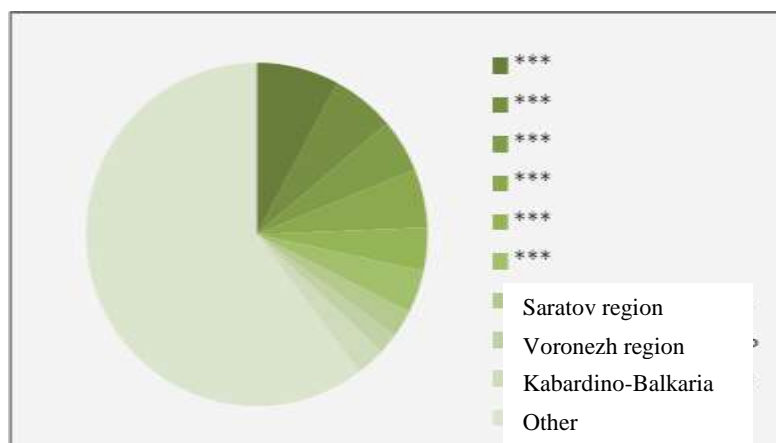
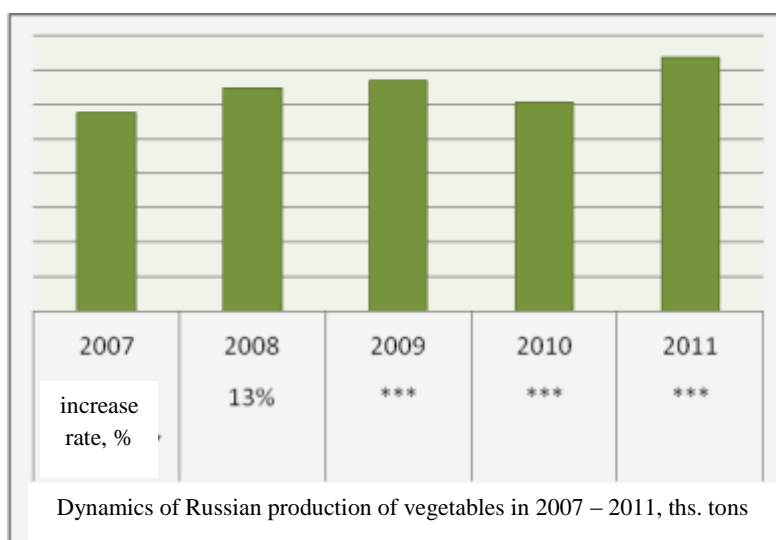


Structure of retail sales of fresh vegetables by federal districts in January - September 2012, %

## CHAPTER 10

## PRODUCTION OF VEGETABLES

In 2010 Russian production of vegetables suffered from unfavorable weather conditions and gross yield reduced by \*\*\*%. In 2011 the situation improved and production of vegetables grew by \*\*\*%. In aggregate \*\*\* mln. tons of vegetables were picked in 2011.



In 2011 \*\*\*% of the total volume was picked in ten main regions growing vegetables, among them \*\*\*% was cropped in \*\*\*, \*\*\*% - in \*\*\* and \*\*\*% in \*\*\*.

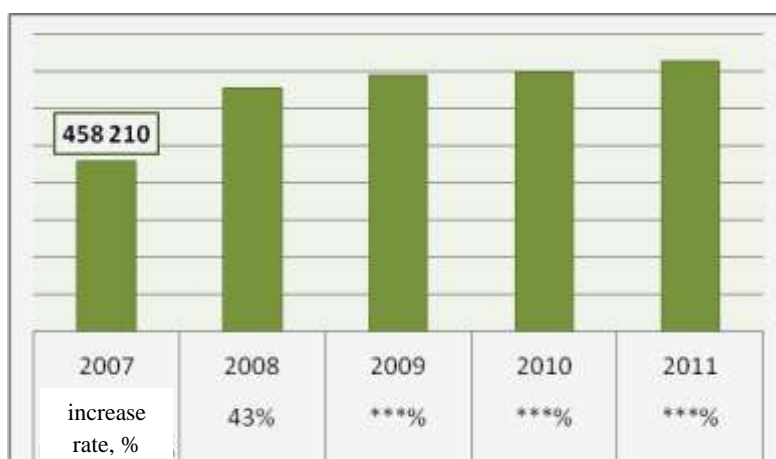
In 2011 share of \*\*\* and \*\*\* regions increased by \*\*\* p.p. for each region. Share of Moscow region reduced by \*\*\* p.p.

## CHAPTER 13

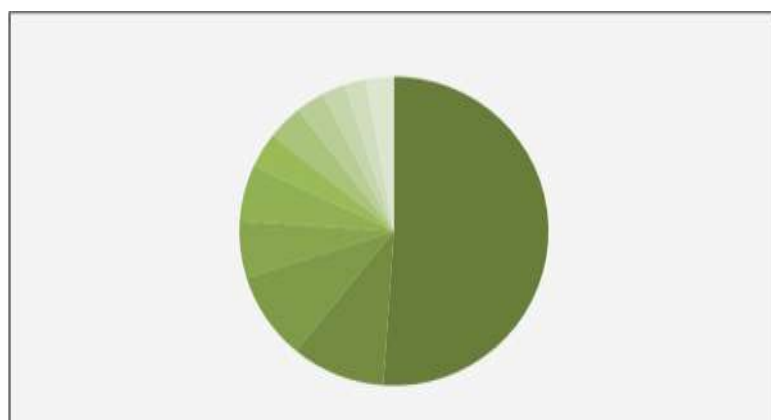
## IMPORT

Import of tomatoes to Russia was growing stably within the period researched. In 2011 it increased by \*\*\*% and amounted to about \*\*\* ths. tons, that is by \*\*\*% more than in 2007.

Cost of tomatoes imported was growing faster, however during the period of maximal growth (in 2008) it was less than volume growth. After in 2009 integrated cost of tomatoes imported almost did not change (+3%), in 2010 it increased dramatically by \*\*\*%, and in 2011 by \*\*\*% more and reached \*\*\* mln. dollars.



Dynamics of Russian import of tomatoes by years in 2007 – 2011, tons



Structure of Russian import of tomatoes in physical terms by countries of origin in 2011, %

In 2011 one half of tomatoes was imported to Russian market from \*\*\*, another \*\*\*% from \*\*\*, a bit less (\*\*\*%) – was provided by China, shares of other countries made up \*\*\*% and less.

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Source: Federal State Statistics Service

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## ABOUT INTESCO RESEARCH GROUP

## ABOUT INTESCO RESEARCH GROUP COMPANY

**INTESCO RESEARCH GROUP** is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

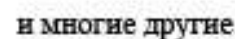
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Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo”, Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

### OUR CLIENTS:



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL  
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