



**Intesco  
Research  
Group**

# CANNED VEGETABLES AND RUSSIAN MARKET OF CANNED VEGETABLES



MOSCOW 2012

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## RESEARCH METHODOLOGY

**Subject of the research:**

MARKET OF CANNED VEGETABLES

**Goal of research:**

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2015

**Regions of research:**

RUSSIA

AND REGIONS OF RF

**Main blocks of research:**

RUSSIAN MARKET VOLUME

TRENDS ON THE RUSSIAN CANNED VEGETABLES MARKET

CANNED VEGETABLES PRODUCTION IN RUSSIA

CANNED VEGETABLES PRODUCTION BY CATEGORIES IN RUSSIA

THE LARGEST RUSSIAN PRODUCERS OF CANNED VEGETABLES

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RUSSIAN CANNED VEGETABLES EXPORT ANALYSIS BY CATEGORIES

PRODUCER PRICES FOR CANNED VEGETABLES

RETAIL PRICES FOR CANNED VEGETABLES

CONSUMER PREFERENCES ON THE CANNED VEGETABLES MARKET

FORECAST FOR THE RUSSIAN MARKET DEVELOPMENT FOR 2012-2015

**Categories of canned products and preserves analyzed:**

CANNED VEGETABLES

NATURAL CANNED VEGETABLES

VEGETABLES AND MUSHROOMS, CANNED WITH VINEGAR

DIET CANNED VEGETABLES FOR CHILDREN

DRIED VEGETABLES AND MUSHROOMS

VEGETABLES AND MUSHROOMS, CANNED FOR SHORT-TERM STORAGE



**The largest Russian enterprises with profiles:**

«BONDUELLE-KUBAN» LLC

«KHLADOKOMBINAT ZAPADNIY» JSC

«POLYANOE» JSC

«BALTIMOR KRASNODAR» LLC

«POLTAVSKIE KONSERVY» JSC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

**Information sources used:**

Federal State Statistics Service

Economic Development Ministry

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sales reports

Materials of the field's main players

Field print and electronic publications

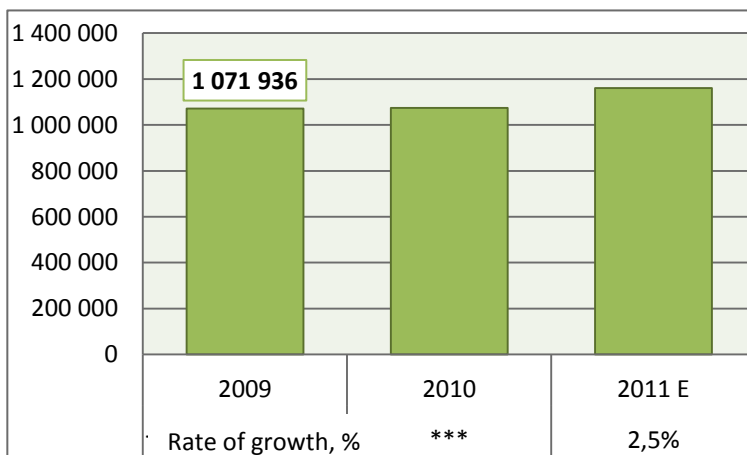
**The research contains 62 schedules, 37 diagrams, 70 tables.**

## EXTRACTS FROM RESEARCH

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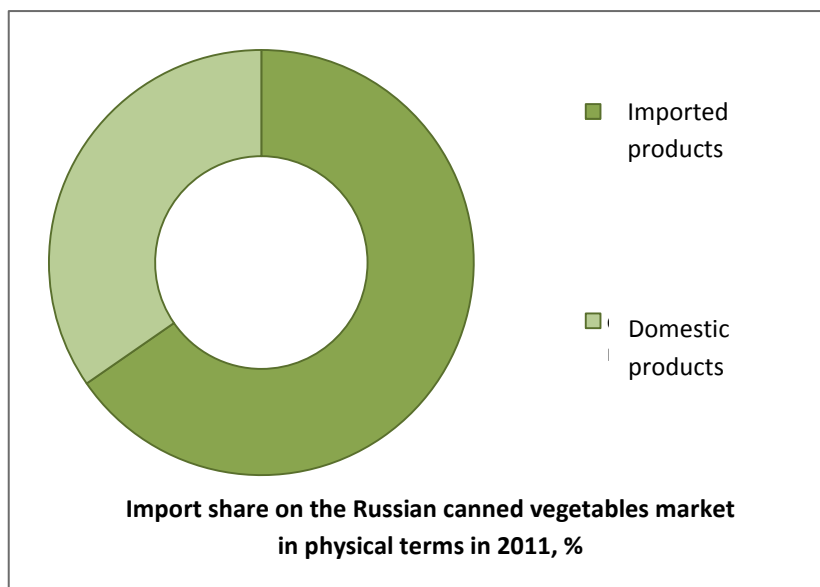
## VOLUME OF THE RUSSIAN CANNED VEGETABLES MARKET

According to Intesco Research Group experts, in this year volume of the Russian canned vegetables market was equal to \*\*\* mln tons, that was \*\*50 tons more, than in previous year. The market growth was primarily due to the increase of foreign supplies volumes to the domestic market. In 2011 the market volume was estimated at 1,\* mln tons.



Dynamics of the Russian canned vegetables market volume in 2009-2011, tons

On the Russian canned vegetables market import share is quite large and amounts to two thirds of all the products on the market. It is mainly the products of Chinese and Spanish producers, who supply canned peas and corn.



Import share on the Russian canned vegetables market in physical terms in 2011, %

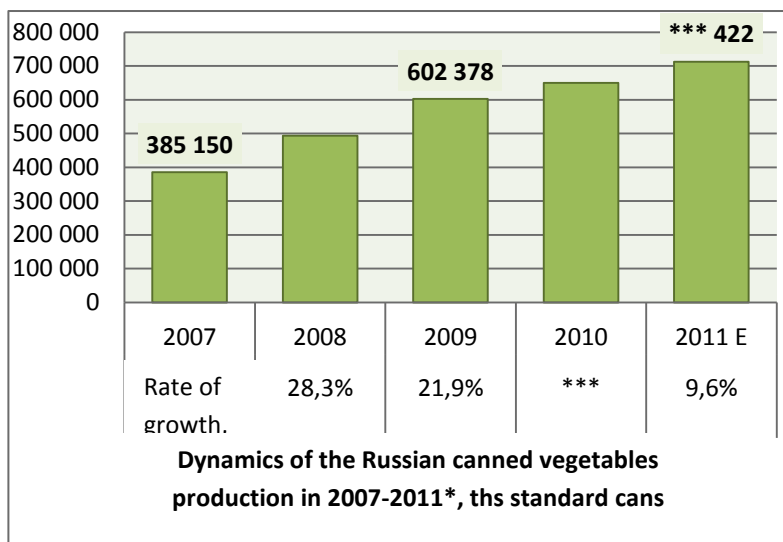
During 2009-2011 import share on the market did not change significantly and amounted to 65-66%.

## CHAPTER 6

CANNED VEGETABLES  
PRODUCTION BY CATEGORIES

During 2008-2011 production volume of natural canned vegetables in Russia gradually increases. According to analysts, in 2011 production of vegetables and mushrooms canned without vinegar amounted to \*\*\*,4 mln standard cans, that is 9,6% more than in 2010.

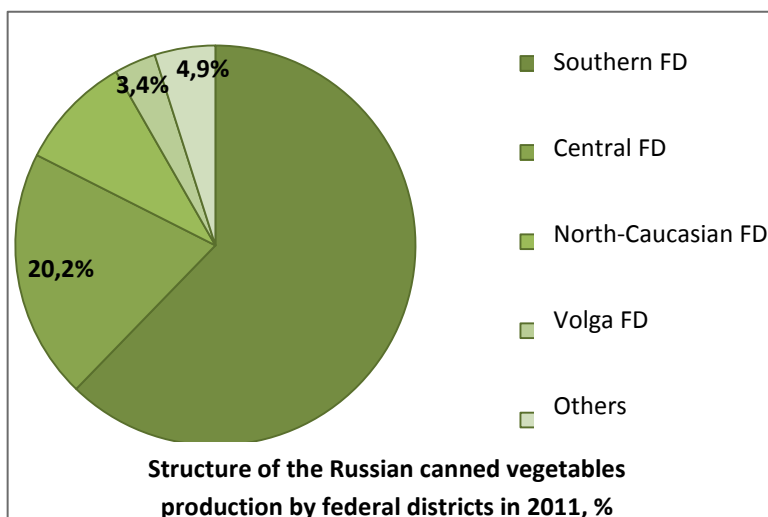
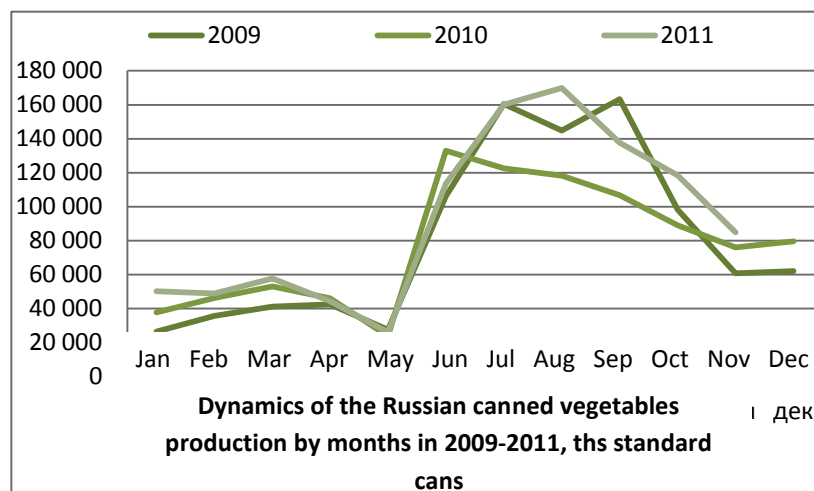
Compared to 2007 production of canned vegetables and mushrooms increased by \*5% or \*\*7,3 mln standard cans.



More than half of natural canned vegetables of domestic production is produced in Southern FD – \*\*,3%. About one fifth of products were produced on the enterprises of Central FD. The share of North-Caucasian FD was equal to less 10%, Volga FD – 3,4%. Other federal districts provided 4,9%.

Dynamics of canned vegetables production is characterized by pronounced seasonality. An active growth is marked in summer months, period of growing vegetables and mushrooms, in November – December production of canned vegetables decreases. Due to the fact that the most part of fruit and vegetables is intended for processing, canned vegetables production depends on the yield of vegetables. In the middle of

2010 the drought did not allow to collect high yield of raw materials, so canned vegetables production was 25% less than in the previous year and in 2011.



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Schedule 61. Dynamics of the volume of the Russian canned vegetables market in 2010-2011 and forecast for 2012-2015, tons

Schedule 62. Dynamics of import share on canned vegetables market in physical terms in 2010-2015\*, %

## ABOUT INTESCO RESEARCH GROUP

**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.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

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  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**