



**Intesco
Research
Group**

GREENHOUSE FACILITIES AND RUSSIAN MARKET OF GREENHOUSE FACILITIES



MOSCOW 2012

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ARCPEA

FEA CN

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

RUSSIAN MARKET OF GREENHOUSE FACILITIES

Goal of research:

EVALUATION OF THE MARKET CONDITION AND FORECAST OF ITS DEVELOPMENT UP TO 2020

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

WORLD MARKET OF GREENHOUSE FACILITIES

RUSSIAN SESCTOR OF GREENHOUSE FACILITIES

TRENDS ON THE RUSSIAN MARKET

FACTORS INFLUENCING THE MARKET

STATE REGULATIONS OF THE MARKET OF GREENHOUSE FACILITIES

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Information sources used:

Federal State Statistics Service

The Ministry of Economic development of Russia

Federal Customs Service

Federal Tax Service

Field's expert evaluations

Reports on retail sales

Materials of the main players

Print and electronic publications of the industry

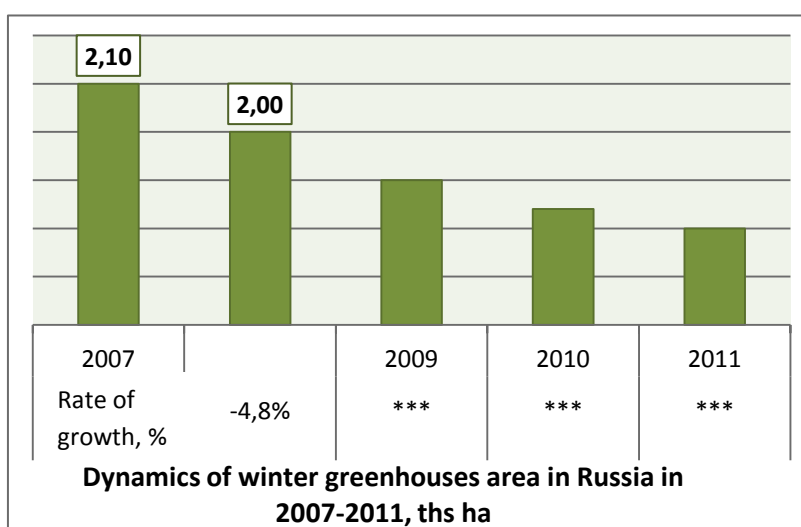
Research contains 57 schedules, 31 diagrams, 24 tables.

EXTRACTS FROM RESEARCH

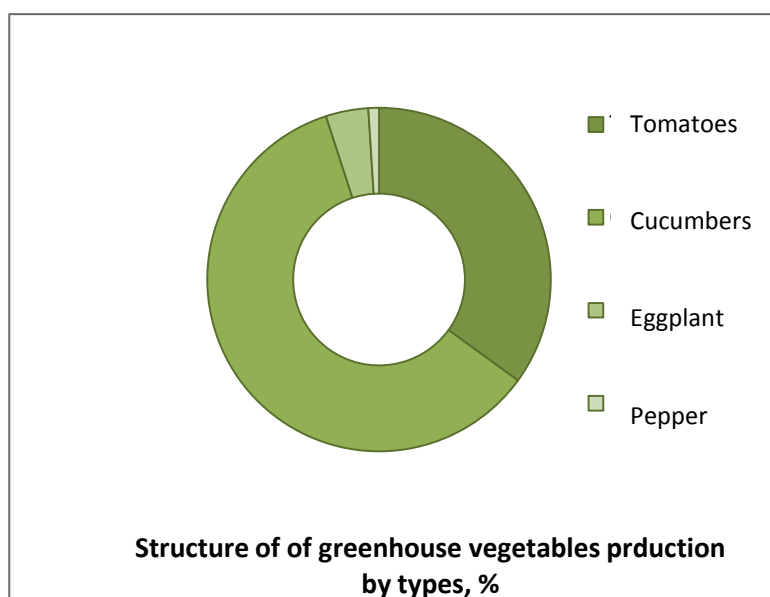
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RUSSIAN SECTOR OF
GREENHOUSE FACILITIES

The area of winter greenhouses in Russia is declining since the mid 80's. In 1986 it was equal to 4,2 thousand hectares; by 1990-th it declined to 3,5 thousand hectares; in 2000 - to 2,3 hectares (almost two times compared to 1986). Then the reduction rate has slowed. By 2007, the area of winter greenhouses decreased by 0,2 hectares and reached 2,1 hectares. In the past five years, the annual reduction rate did not exceed ***%. In 2011, the parameter was equal to *** thousand hectares. However,



some experts estimate the area of winter greenhouses in Russia to *** –*** ths ha. In 2010, according to experts, in Russia there were *** greenhouse facilities.



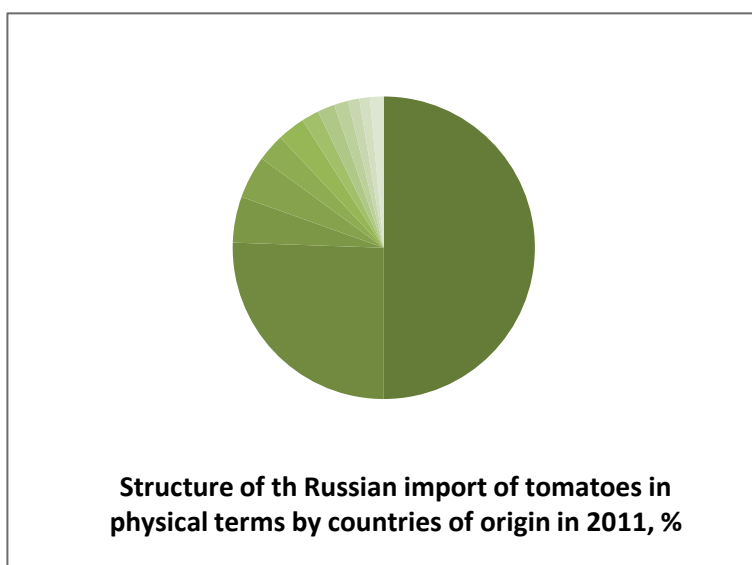
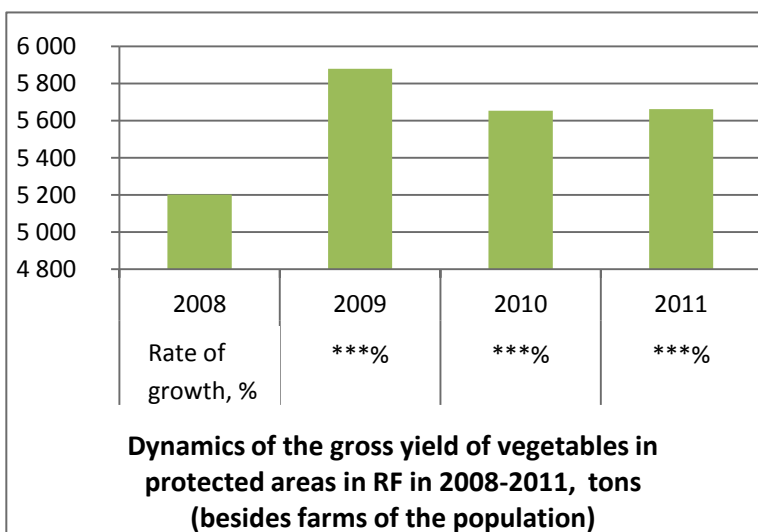
The Russian greenhouses are planting mainly tomatoes and cucumbers: ***% and ***% respectively. Productivity of vegetables in greenhouses is equal to *** kg from ha, although in separate farms it can reach *** kg and more.

CHAPTER 10

REVIEW OF THE MARKET OF
GREENHOUSE FACILITIES
PRODUCTS

The maximal amount of gross yield in protected area was reached in 2009 году - *** ths tons. In 2010 parameter decreased by 4%. In 2011 there were harvested *** ths tons of vegetables from protected ground.

Farms of the population in 2010 produced about ***% of vegetables, ***% were harvested in agricultural organizations and ***% - in farm enterprises.



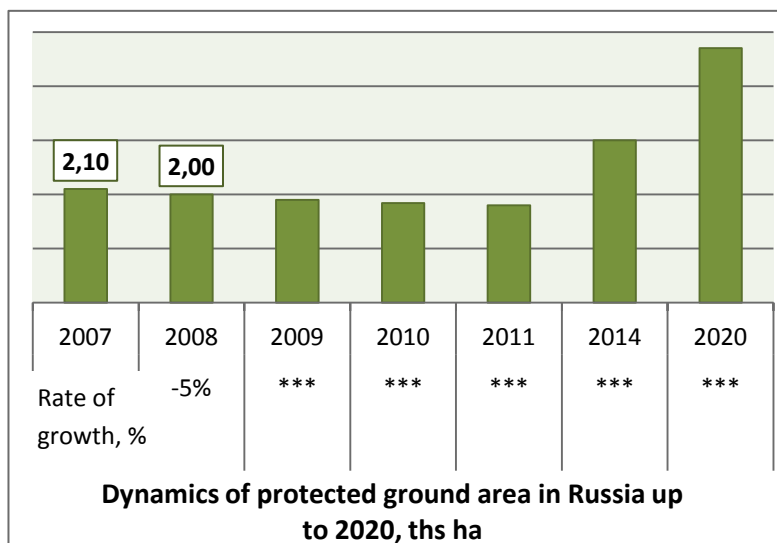
A half of vegetables production on protected ground was concentrated in ***, ***% belonged to ***, slightly less (***%) – to ***, shares of other countries amounted to ***% and less.

In total import cost *** had 51%. *** ranked second – ***%, *** – third with ***%. *** ranked fourth with ***% of total cost.

CHAPTER 12

**FORECAST OF THE RUSSIAN
MARKET OF GREENHOUSE
FACILITIES**

In accordance to the state program of vegetable production development in greenhouses by 2014, the total area of protected ground will be equal to *** thousand ha (will increase by ***% over three years), and by 2020 it will increase to *** ths ha.



The gross yields of protected ground vegetables in 2014 are forecasted at the amount of *** ths tons, by 2020– *** mln tons. Taking into account the medical norm of *** kg/person per year for the population of Russia, domestic producers of vegetables in greenhouses have to produce *** million tons of goods. Thus, the Russian economy will provide ***% of the market.

The promised government support attracts investors to the sector, so it is expected to commission a great number of modern greenhouses.

CHAPTER 9**NEW GREENHOUSE PROJECTS
OF RUSSIA*****North Western FD*****Agricultural holding «Vyborzhets» (Yanino Vil of Leningrad Region – headquarters)**

Agricultural holding «Vyborzhets» is one of the largest producers of fresh vegetables and herbs in North Western District. Agricultural holding includes:

- «Agricultural company «Vyborzhets», JSC
- «Karelskiy», JSC
- «Vyborzhets» TH

Total area of greenhouses – ** ha.

Needs of the enterprise are provided by boiler plant, besides agricultural holding has its own fleet, which delivers products to retailers.

The company is equipped with the latest technological equipment of leading European companies, which allows to produce more than ** tons of fresh cucumbers, tomatoes and greens daily. The development plans include construction of greenhouses of the new generation with the area up to ** ha.

In 2011 construction of a distribution center with an area of ** thousand square meters began, which will perform the major functions of presales (storage, sorting, packing and shipment of products).

In 2012, commissioning of greenhouse complex of the area of ** ha with an annual production of ** thousand tons of cucumbers, and a ** MW power center is planned.

Greenhouse complex «Karelskiy», Karelia

Reconstruction of the plant is planned, which assumes the replacement of obsolete boiler equipment with modern gas generating installation, which would reduce the cost of produced heat and electricity.

The plant expands production: two production lines to grow greens were launched, new greenhouses with the area of ** ha were built.

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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

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E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

Tel.: +7 (495) 645-97-22