



**Intesco
Research
Group**

FRESH VEGETABLES AND RUSSIAN MARKET OF FRESH VEGETABLES



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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

Main blocks of research:

WORLD MARKET OF FRESH VEGETABLES

ANALYSIS OF RETAIL SALES OF FRESH VEGETABLES

VOLUME OF RUSSIAN FRESH VEGETABLES MARKET

TRENDS ON RUSSIAN MARKET OF FRESH VEGETABLES

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RUSSIAN PRODUCTION OF FRESH VEGETABLES

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RUSSIAN EXPORT OF FRESH VEGETABLES

RUSSIAN IMPORT OF FRESH VEGETABLES

PRODUCER PRICES FOR FRESH VEGETABLES

RETAIL PRICES FOR FRESH VEGETABLES

FORECAST OF FRESH VEGETABLES MARKET DEVELOPMENT UNTIL 2020

Largest Russian enterprises with profiles:

«Agrokombinat «Moskovskiy» JSC

«Agrokombinat «Yuzhniy» JSC

«Teplichniy kombinat «Mayskiy» LLC

«Alekseevskiy» State Unitary Agricultural enterprise

«Agrokombinat «Teplichniy» JSC

«Plemzavod»Detskoselskiy» APC

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

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 100 schedules, 48 diagrams, 51 tables, 7 schemes

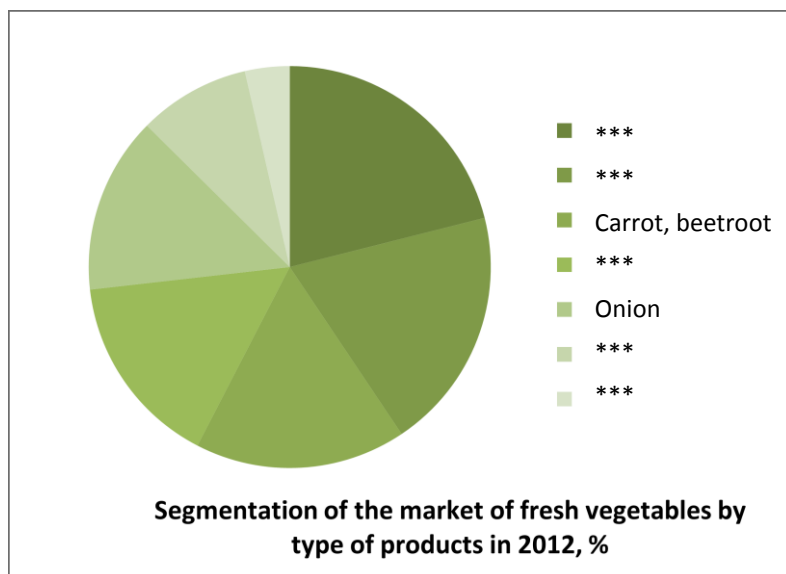
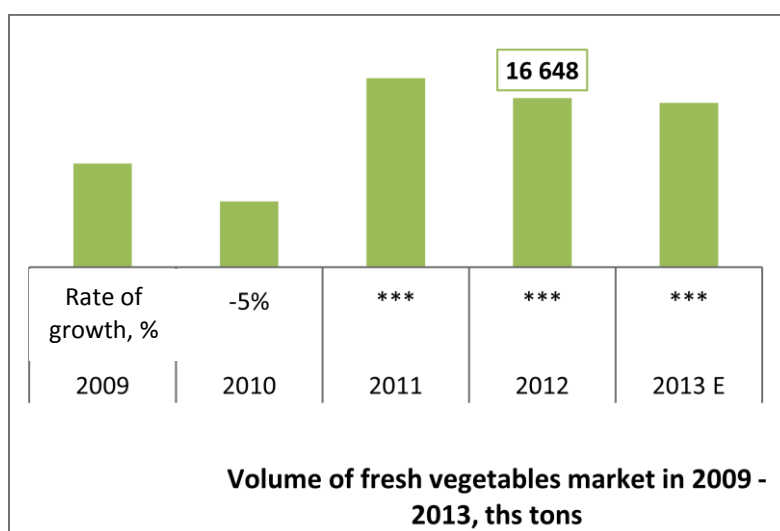
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VOLUME OF RUSSIAN FRESH VEGETABLES MARKET

From 2009 to 2013, volume of fresh vegetables market increased by over **%. ** parameter was reached in 2010 due to ** by over **, and in 2011 parameter amounted to ** ths tons that was **. In ** volume of fresh vegetables market amounted to 16,5 mln tons, that was 1% **, than in **.

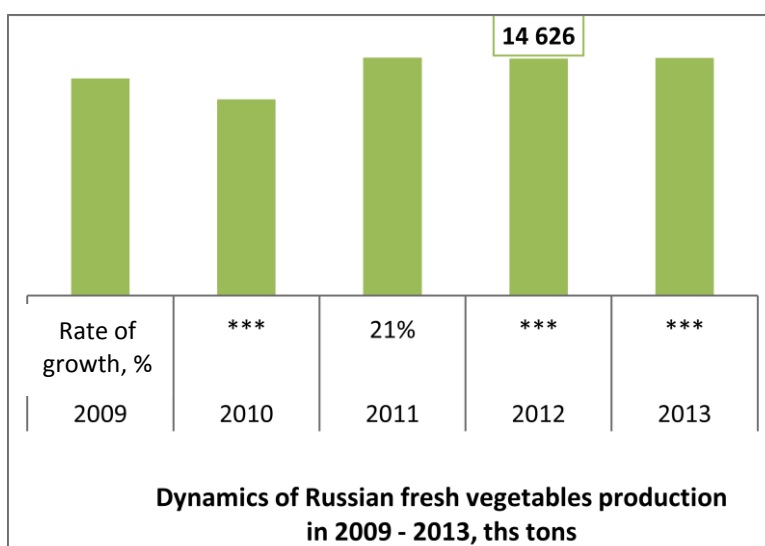
Market of fresh vegetables in Russia more than half is represented by four crops: ** (21%), ** (**%), carrot and beetroot (**%). ** also has a significant share of total volume – 14%. Russian vegetables, grown in ** have **% of the market.



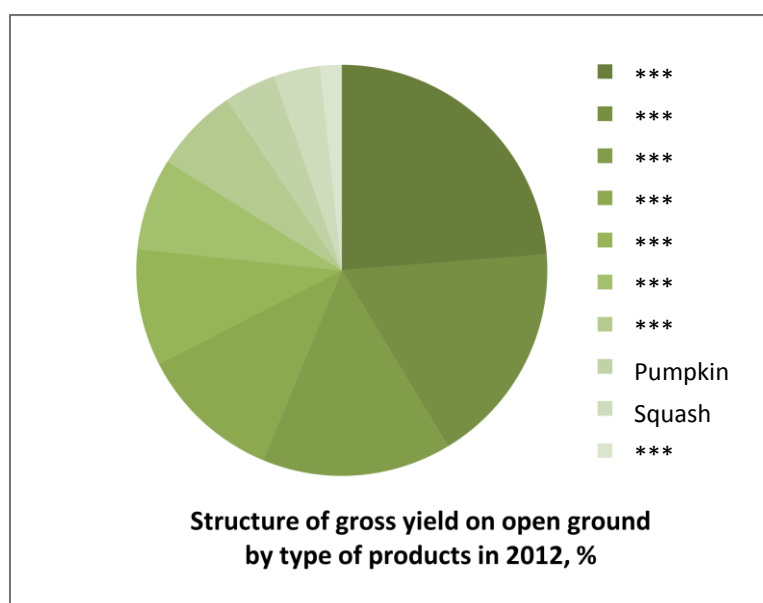
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RUSSIAN PRODUCTION OF FRESH VEGETABLES

Russian vegetables production in *** suffered from unfavorable weather conditions and gross proceeds decreased by ***%. In 2011 situation improved and vegetables production increased by 21%. The past two years was marked with insignificant fluctuations however they were not less *** ths tons. Nevertheless the state program of agriculture development for 2008-2012 affected the gross yield: in *** it exceeded parameters of 2007 by over *** mln tons. Parameter of 2013 was equal to *** ths tons.



In open ground in 2012 3 crops had been grown the share of which was equal to over a half of gross yields: *** (***%), *** (18%), *** (15%). About ***% in the structure belonged to *** while other vegetables had a *** in total structure.

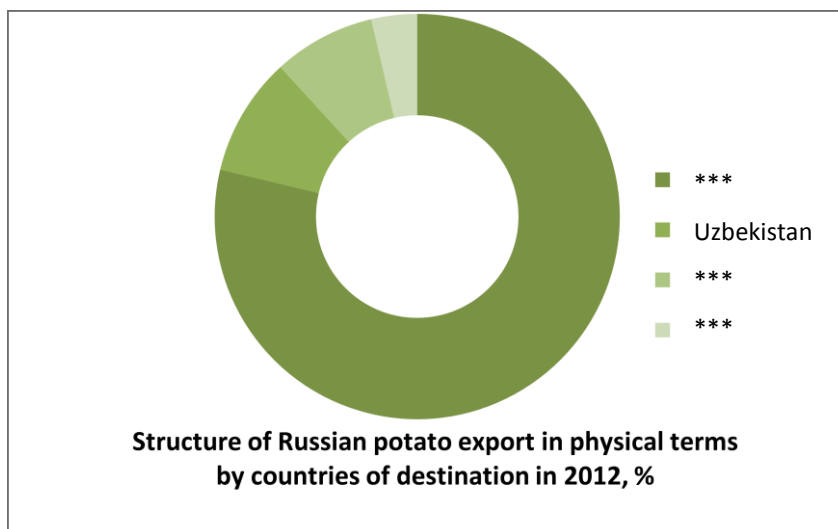
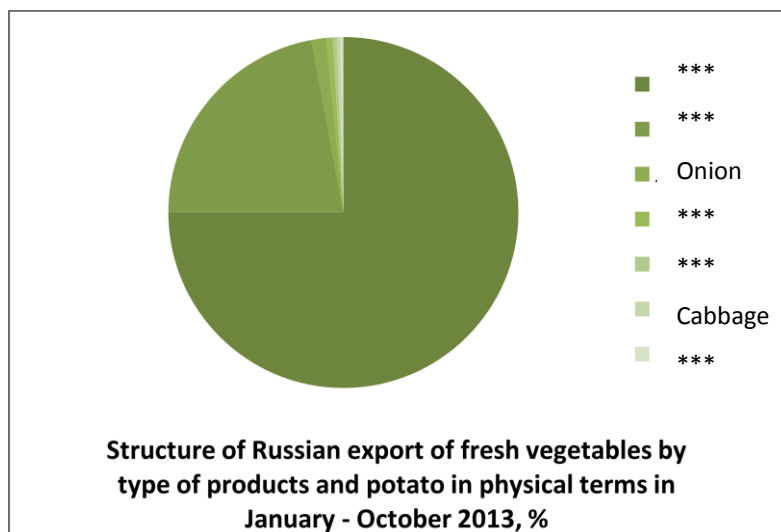


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As for October 2013 *** had almost three quarters in export volumes while *** had 22% only. Slightly more than 1% belonged to onion, the remaining shares ***, ***, tomato, *** and etc.

The main consumer of Russian potato in physical terms in 2012 was ***, which had 4/5 of all potato supplied by Russia to foreign markets, Uzbekistan and *** followed it with ***% and ***% respectively.

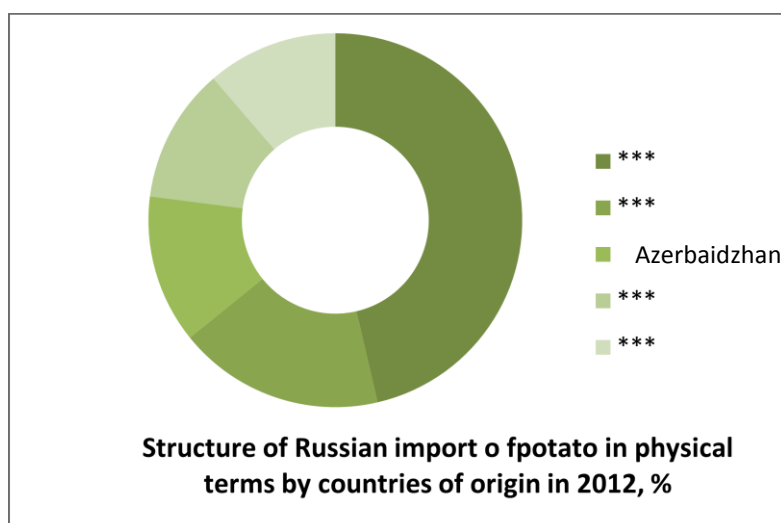
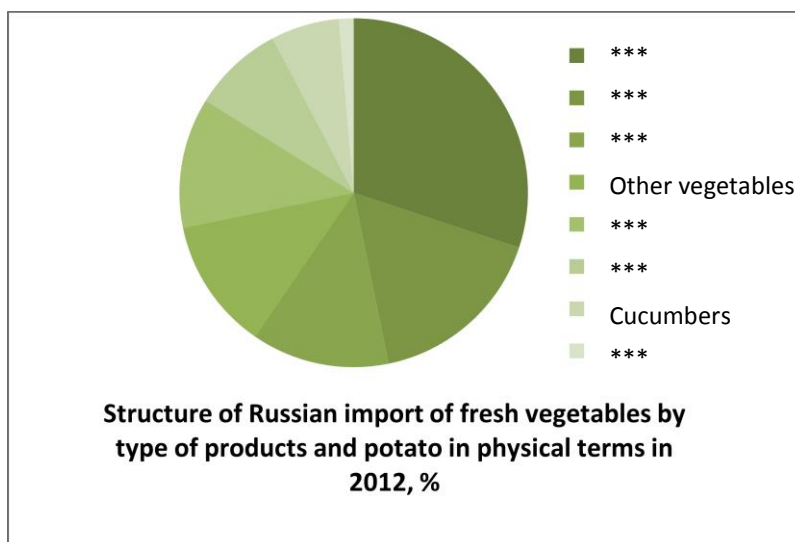


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The main component of Russian import in 2012 was *** (30%), Egyptian potato (***%), *** (***%) and other vegetables from Israel and Poland (***%).

One fifth of all potato import in 2012 belonged to ***, and from 11% to 13% of the volume were imported from ***, Holland and ***. All these suppliers satisfied more than half of the Russian demand for potato.



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ABOUT INTESCO RESEARCH GROUP

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