



**Intesco  
Research  
Group**

# CANNED VEGETABLES AND RUSSIAN MARKET OF CANNED VEGETABLES



MOSCOW 2012

## CONTENTS

<b>CONTENTS .....</b>	<b>3</b>
<b>RESEARCH METHODOLOGY .....</b>	<b>8</b>
<b>EXTRACTS FROM RESEARCH.....</b>	<b>10</b>
<b>LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES .....</b>	<b>13</b>
<b>ABOUT INTESCO RESEARCH GROUP .....</b>	<b>22</b>

## CONTENTS

### RESEARCH METHODOLOGY

### LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

#### 1. GENERAL ECONOMIC SITUATION IN RUSSIA

##### 1.1. Population of Russia

*Dynamics of population*

*The largest cities*

*Social standards of living*

*Economic activity*

##### 1.2. Economic situation

*Dynamics of economic development*

*Stability of the state budget*

##### 1.3. Situation of Russia in the world

*Share of RF in the population of the world*

#### 2. SUBJECT OF RESEARCH

##### 2.1. Characteristics of canned vegetables

*Conservation history*

*Types of canned vegetables*

##### 2.2. Classification methods

*Classification by ARCPEA*

*Classification by FEA CN*

#### 3. VOLUME OF THE RUSSIAN CANNED VEGETABLES MARKET

##### 3.1. Russian market volume dynamics

##### 3.2. Import share on the Russian market

##### 3.3. Import share dynamics on the Russian market

##### 3.4. Canned vegetables consumption in Russia

##### 3.5. Russian canned vegetables market structure by categories

#### 4. TRENDS ON THE RUSSIAN CANNED VEGETABLES MARKET

#### 5. CANNED VEGETABLES PRODUCTION IN RUSSIA

##### 5.1. Dynamics of production volume by years

##### 5.2. Dynamics of production volume by months

##### 5.3. Production structure by groups of canned vegetables

#### 6. CANNED VEGETABLES PRODUCTION BY CATEGORIES

##### 6.1. Natural canned vegetables

*Dynamics of production volume by years*

*Production structure by types*

*Production volumes in federal districts of RF*

*Production structure by federal districts of RF*

*Production volumes of in regions of RF*

*Regional production structure*

#### 6.2. Vegetables and mushrooms canned without vinegar

*Dynamics of production volume by years*

*Production structure by types*

*Production volumes in federal districts of RF*

*Production structure by federal districts of RF*

*Production volumes of in regions of RF*

*Regional production structure*

#### 6.3. Canned vegetables and mushrooms for short-term storage

*Dynamics of production volume by years*

*Production volumes in federal districts of RF*

*Production structure by federal districts of RF*

*Production volumes of in regions of RF*

*Regional production structure*

#### 6.4. Dried vegetables and mushrooms

*Dynamics of production volume by years*

*Regional production structure*

### **7. THE LARGEST RUSSIAN CANNED VEGETABLES PRODUCERS**

#### 7.1. Revenues of the largest Russian producers

#### 7.2. Regional structure of enterprises distribution

#### 7.3. Production volumes of the largest Russian producers

*Canned vegetables, except tomato paste and puree*

*Tomato paste and ketchup*

### **8. ANALYSIS OF RUSSIAN CANNED VEGETABLES IMPORT (IN GENERAL)**

#### 8.1. Import volume dynamics by years

#### 8.2. Russian import structure by categories

### **9. ANALYSIS OF RUSSIAN CANNED VEGETABLES IMPORT BY SEGMENTS**

#### 9.1. Natural canned vegetables, except mushrooms and tomato

*Import volume dynamics by years*

*Import volume dynamics by months*

*Import structure by types*

*Import volume in physical terms*

*Import structure in cost terms*

#### 9.2. Vegetables and mushrooms canned without vinegar

*Import dynamics by years*

*Import volume dynamics by months*

*Import volume in physical terms*

*Import volumes in cost terms*

#### 9.3. Canned vegetables and mushrooms for short-term storage

*Import dynamics by years*

*Import volume in physical terms*

*Import volumes in cost terms*

#### 9.4. Dried vegetables and mushrooms

*Import dynamics by years*

*Import volume in physical terms*

*Import volumes in cost terms*

### **10. ANALYSIS OF RUSSIAN CANNED VEGETABLES EXPORT (IN GENERAL)**

#### 10.1. Export volumes dynamics by years

#### 10.2. Russian export structure by categories

### **11. ANALYSIS OF RUSSIAN CANNED VEGETABLES EXPORT BY SEGMENTS**

#### 11.1. Natural canned vegetables, except mushrooms

*Export volumes dynamics by years*

*Export volumes dynamics by months*

*Export structure by types*

*Export volumes in physical terms*

*Export volumes in cost terms*

#### 11.2. Vegetables and mushrooms canned without vinegar

*Export volumes dynamics by years*

*Export volumes dynamics by months*

*Export volumes in physical terms*

*Export volumes in cost terms*

#### 11.3. Canned vegetables and mushrooms for short-term storage

*Export volumes dynamics by years*

*Export volumes in physical terms*

### **12. PRODUCER PRICES FOR CANNED VEGETABLES**

## 12.1. Canned vegetables (except tomato paste and puree)

*Dynamics of average producer prices**Dynamics of average producer prices by months*

## 12.2. Tomato paste and puree

*Dynamics of average producer prices**Dynamics of average producer prices by months***13. RETAIL PRICES FOR CANNED VEGETABLES**

## 13.1. Snack and dinner canned vegetables

*Dynamics of average retail prices by years**Dynamics of average retail prices by months*

## 13.2. Pickled, canned vegetables

*Dynamics of average retail prices by years**Dynamics of average retail prices by months*

## 13.3. Diet canned vegetables for children

*Dynamics of average retail prices by years**Dynamics of average retail prices by months*

## 13.4. Canned tomato

*Dynamics of average retail prices by years**Dynamics of average retail prices by months***14. CONSUMER PREFERENCES ON THE CANNED VEGETABLES MARKET****15. PROFILES OF THE LARGEST ENTERPRISES PRODUCING CANNED VEGETABLES**

## 15.1. «Bonduelle-Kuban» LLC

*Reference information**Types of activity**Balance sheet**Profit and loss statement**Cash flow statement**Financials*

## 15.2. «Khladokombinat Zapadny» JSC

*Reference information**Types of activity**Balance sheet**Profit and loss statement**Cash flow statement*

*Financials*

## 15.3. «Polyanoe» JSC

*Reference information**Types of activity**Balance sheet**Profit and loss statement**Cash flow statement**Financials*

## 15.4 «Baltimor Krasnodar» LLC

*Reference information**Types of activity**Production volume**Profit and loss statement**Cash flow statement**Financials*

## 15.5. «Poltavskie konservy» JSC

*Reference information**Types of activity**Balance sheet**Profit and loss statement**Cash flow statement**Financials***16. FORECAST OF THE RUSSIAN CANNED VEGETABLES DEVELOPMENT FOR 2012-2015****ABOUT INTESCO RESEARCH GROUP**

## 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

RUSSIAN CANNED VEGETABLES IMPORT ANALYSIS

RUSSIAN CANNED VEGETABLES IMPORT ANALYSIS BY CATEGORIES

RUSSIAN CANNED VEGETABLES EXPORT ANALYSIS

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

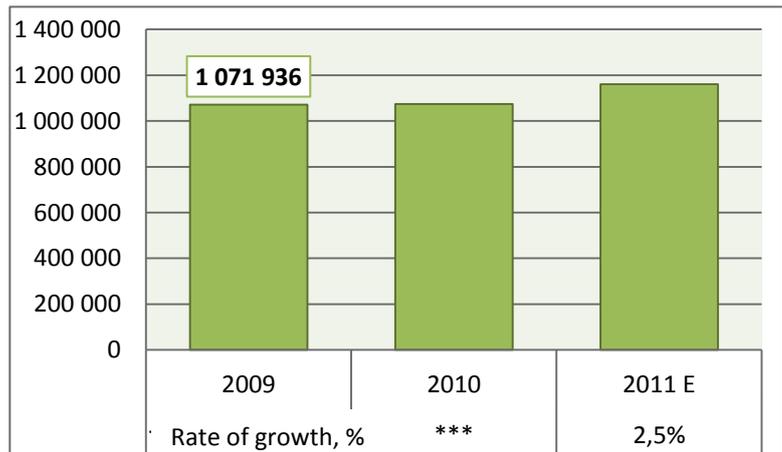
**The research contains 62 schedules, 37 diagrams, 70 tables.**

## EXTRACTS FROM RESEARCH

### CHAPTER 3

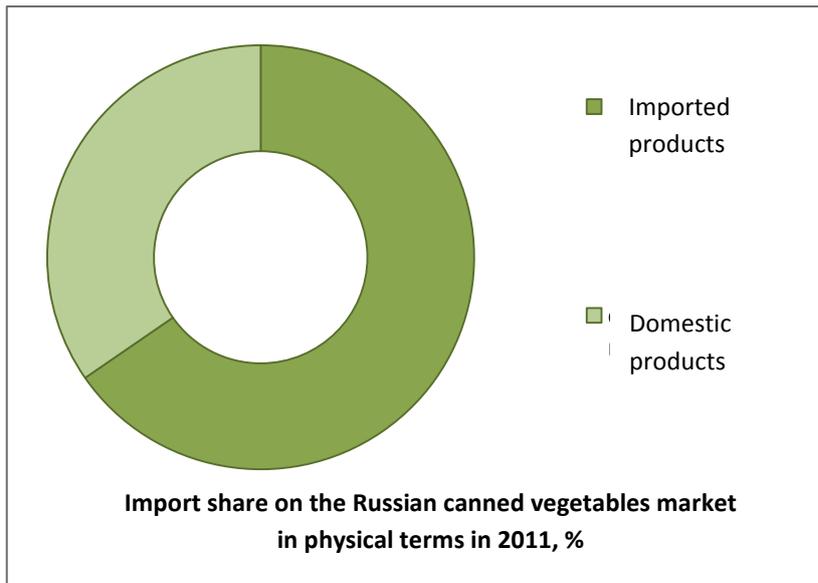
#### VOLUME OF THE RUSSIAN CANNED VEGETABLES MARKET

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, %

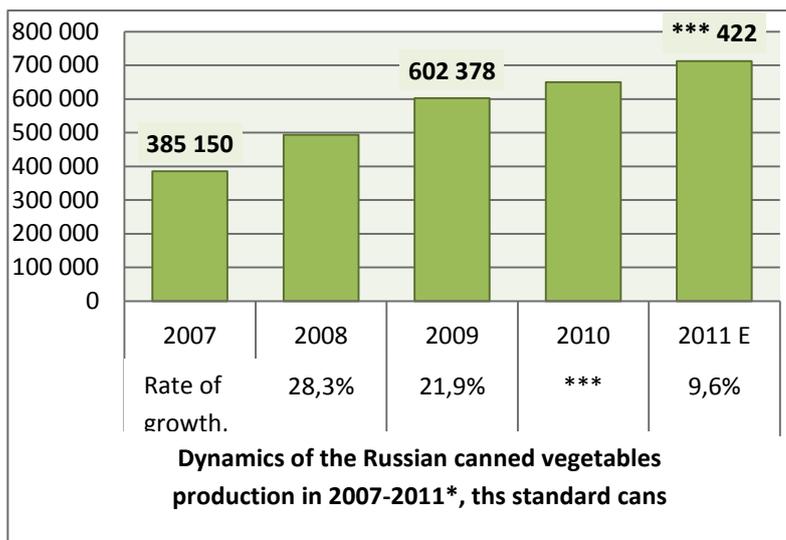
During 2009-2011 import share on the market did not change significantly and amounted to 65-66%.

## 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.

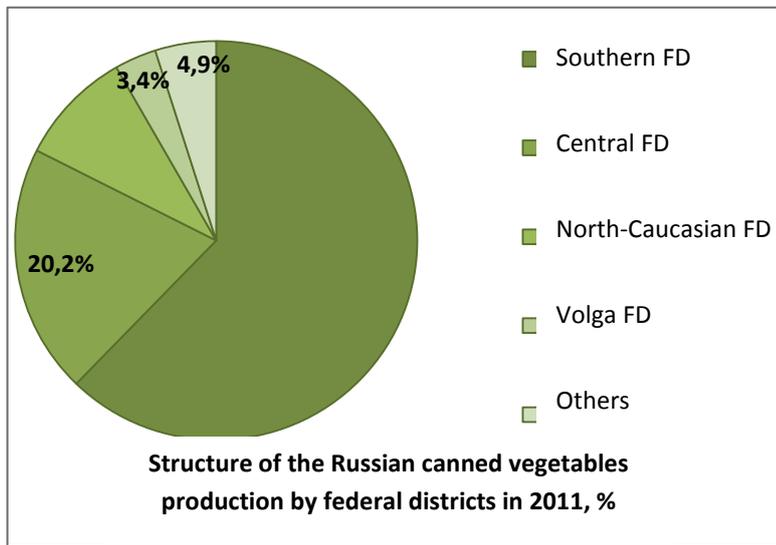
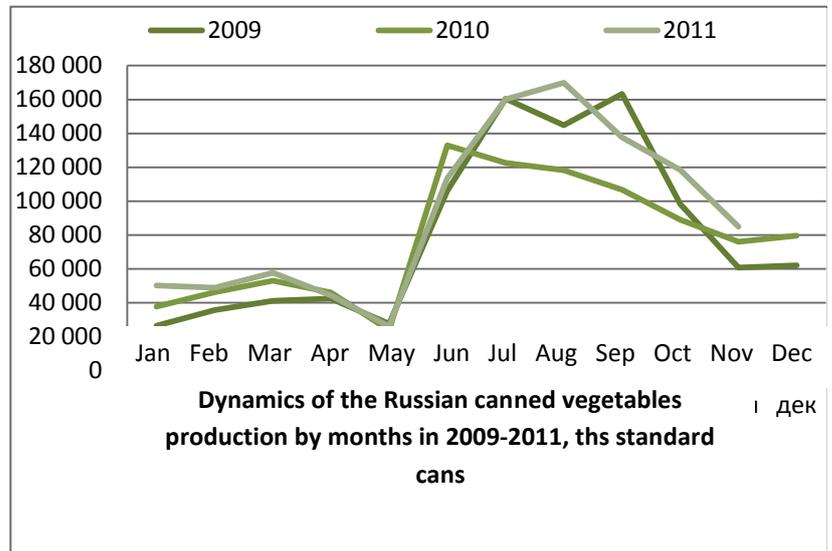
Compared to 2007 production of canned vegetables and mushrooms increased by **\*5%** or **\*\*7,3** mln standard cans.



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.



## LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

### RESEARCH METHODOLOGY

#### LIST OF SCHEDULES, DIAGRAMS AND TABLES

##### 1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Dynamics of resident population number of Russia in 2000, 2005, 2010 and forecast for 2015 and 2020, ths people

Table 1. Population number of the largest cities of Russia according to All-Russian census of 2010, ths people

Schedule 2. Dynamics of actual household disposable income in Russia in 2000-2010, %

Schedule 3. Dynamics of number of employed and unemployed people in RF in 2006-2010, ths people

Schedule 4. Dynamics of share of the unemployed in economically active population by FD of RF in 2006-2010, %

Schedule 5. Dynamics of GDP in prices of 2003 in 2002-2010, billion dollars

Schedule 6. Investments into the fixed capital of RF in 2001-2010

Schedule 7. Surplus/deficit of consolidated budget of RF in 2006-2010, %

Schedule 8. Dynamics of total external debt of RF in 2001-2010

Schedule 9. Consumer prices index in RF in 2001-2010, %

Schedule 10. . Share of RF in the population of the world in 2000-2010 and forecast until 2100

Schedule 11. Share of RF in the world GDP in 2000-2010 and forecast for 2011-2016, %

##### 2. SUBJECT OF RESEARCH

##### 3. VOLUME OF THE RUSSIAN CANNED VEGETABLES MARKET

Schedule 12. Dynamics of the Russian canned vegetables market volume in 2009-2011\*, tons

Diagram 1. Import share on the market of canned vegetables in physical terms in 2011, %

Diagram 2 Import share dynamics on the Russian market of canned vegetables in physical terms in 2009-2011, %

Schedule 13. Per capita consumption of canned vegetables in Russia in 2009-2011, kg/person

Diagram 3. Dynamics of the Russian canned vegetables market structure by types in 2009-2011, %

##### 4. TRENDS ON THE RUSSIAN CANNED VEGETABLES MARKET

##### 5. CANNED VEGETABLES PRODUCTION IN RUSSIA

Schedule 14. Dynamics of the Russian canned vegetables production in 2007-2011\*, ths standard cans

Schedule 15. Dynamics of the Russian canned vegetables production by months in 2009-2011, the standard cans

Diagram 4. Production structure of canned vegetables by types in 2011, %

## 6. CANNED VEGETABLES PRODUCTION BY CATEGORIES

Schedule 16. Dynamics of the Russian production volume of natural canned vegetables in 2007-2011\*, the standard cans

Diagram 5. Production structure of natural canned vegetables by types in 2010, %

Table 2. Production volumes of natural canned vegetables in federal districts of RF in 2007-2011, the standard cans

Diagram 6. Russian production structure of natural canned vegetables by federal districts in 2011, %

Table 3. Production volumes of natural canned vegetables in regions of RF in 2007-2011, the standard cans

Schedule 17. Dynamics of the Russian natural canned vegetables in the main regions of RF in 2007-2010, the standard cans

Diagram 7. Regional Russian production structure of natural canned vegetables in 2011, %

Schedule 18. Dynamics of the volume of Russian mushrooms and vegetables with vinegar production, in 2009-2011\*, the standard cans

Diagram 8. Production structure of vegetables canned with vinegar, by types in 2010, %

Table 4. Production volumes of mushrooms and vegetables canned with vinegar, in federal districts of RF in 2009-2011, the standard cans

Diagram 9. Structure of Russian mushrooms and vegetables with vinegar production by federal districts in 2011, %

Table 5. Production volumes of mushrooms and vegetables canned with vinegar, in regions of RF in 2009-2011, the standard cans

Diagram 10. Regional structure of Russian mushrooms and vegetables with vinegar production, in 2011, %

Schedule 19. Dynamics of the volume of Russian mushrooms and vegetables production for short-term storage, in 2009-2011\*, tons

Table 6. Production volumes of mushrooms and vegetables canned for short-term storage, in federal districts of RF in 2009-2011, tons

Diagram 11. Russian production structure of mushrooms and vegetables canned for short-term storage, by federal districts in 2011, %

Table 7. Production volumes of mushrooms and vegetables canned for short-term storage, in regions of RF in 2009-2011, tons

Diagram 12. Regional structure of Russian mushrooms and vegetables production for short-term storage, in 2011, %

Schedule 20. Dynamics of the volume of Russian dried vegetables and mushrooms production in 2009-2011\*, tons

Table 8. Production volumes of dried vegetables and mushrooms in regions of RF in 2009-2011, tons

Diagram 13. Regional structure of Russian dried vegetables and mushrooms production in 2011, %

## **7. THE LARGEST RUSSIAN CANNED VEGETABLES PRODUCERS**

Table 9. The largest companies by total profit volume with the main type of activity according to FEA CN «processing and conservation of vegetables» in RF in 2010, ths rubles

Diagram 14. Structure of canned vegetables producers distribution by regions of RF in 2011, %

Table 10. The largest companies by production of canned vegetables, except tomato paste and puree, in 2005-2007, ths standard cans

Table 11. The largest producers by output of ketchup and tomato sauce in Russia, ths standard cans

Schedule 21. Dynamics of the volume of ketchup and tomato sauce production on the largest enterprises of RF in 2007-2009, ths standard cans

Diagram 15. Shares of the largest enterprises in the all-Russian production structure of ketchup and tomato sauce in 2009, %

## **8. ANALYSIS OF RUSSIAN CANNED VEGETABLES IMPORT (IN GENERAL)**

Schedule 22. Dynamics of the volume of Russian canned vegetables import in 2007-2011\*, tons

Schedule 23. Dynamics of the volume of Russian canned vegetables import in 2007-2011\*, ths dollars

Diagram 16. Structure of the Russian market of canned vegetables by categories in physical terms in 2010, %

Table 12. Volume of Russian canned vegetables import by types in 2007-2011\*, tons

Diagram 17. Structure of the Russian canned vegetables import by categories in cost terms in 2011\*, %

Table 13. Volume of Russian canned vegetables import by types in 2007-2011\*, ths dollars

## **9. ANALYSIS OF RUSSIAN CANNED VEGETABLES IMPORT BY SEGMENTS**

Schedule 24. Dynamics of the import volume of Russian natural canned vegetables except tomato and mushrooms, in 2007-2011\*, tons

Schedule 25. Dynamics of the import volume of Russian natural canned vegetables except tomato and mushrooms, in 2007-2011\*, ths dollars

Schedule 26. Dynamics of the import volume of Russian natural canned vegetables except tomato and mushrooms, in 2007-2011, tons

Schedule 27. Dynamics of the import volume of Russian natural canned vegetables except tomato and mushrooms, by months in 2007-2011, ths dollars

Diagram 18. Import structure of natural canned vegetables except tomato and mushrooms, by types in physical terms in 2011, %

Table 14. Import volume of the Russian natural canned vegetables except tomato and mushrooms, by types in 2007-2011, tons

Diagram 19. Import structure of natural canned vegetables except tomato and mushrooms, by types in cost terms in 2011, %

Table 15. Import volume of the Russian natural canned vegetables except tomato and mushrooms, by types in 2007-2011, ths dollars

Table 16. Import volumes of the Russian natural canned vegetables except tomato and mushrooms, by supplying countries in 2007-2011, tons

Diagram 20. Import structure of the Russian natural canned vegetables except tomato and mushrooms, by countries of origin in physical terms in 2011, %

Table 17. Import volumes of the Russian natural canned vegetables except tomato and mushrooms, by supplying countries in 2007-2011, ths dollars

Diagram 21. Import structure of the Russian natural canned vegetables except tomato and mushrooms, by countries of origin in cost terms in 2011, %

Schedule 28. Dynamics of the volume of Russian import of vegetables and mushrooms canned with vinegar, in 2007-2011\*, tons

Schedule 29. Dynamics of the volume of Russian import of vegetables and mushrooms canned with vinegar, in 2007-2011\*, ths dollars

Schedule 30. Dynamics of the volume of Russian import of vegetables and mushrooms canned with vinegar, by months in 2007-2011, tons

Schedule 31. Dynamics of the volume of Russian import of vegetables and mushrooms canned with vinegar, by months in 2007-2011, tons

Table 18. Volumes of Russian import of vegetables and mushrooms canned with vinegar, by supplying countries in 2007-2011, tons

Diagram 22. Structure of Russian import of vegetables and mushrooms canned with vinegar, by countries of origin in physical terms in 2011, %

Table 19. Volumes of Russian import of vegetables and mushrooms canned with vinegar, by supplying countries in 2007-2011, ths dollars

Diagram 23. Structure of Russian import of vegetables and mushrooms canned with vinegar, by countries of origin in cost terms in 2011, %

Schedule 32. Dynamics of the volume of Russian import of canned vegetables and mushrooms for short-term storage, in 2007-2011\*, tons

Schedule 33. Dynamics of the volume of Russian import of canned vegetables and mushrooms for short-term storage, in 2007-2011\*, ths dollars

Table 20. Volumes of Russian import of canned vegetables and mushrooms for short-term storage, by supplying countries in 2007-2011, tons

Diagram 24. Structure of Russian import of canned vegetables and mushrooms for short-term storage, by countries of origin in physical terms in 2011, %

Table 21. Volumes of Russian import of canned vegetables and mushrooms for short-term storage, by supplying countries in 2007-2011, ths dollars

Diagram 25. Structure of Russian import of canned vegetables and mushrooms for short-term storage by countries of origin in cost terms in 2011, %

Schedule 34. Dynamics of the volume of Russian dried vegetables and mushrooms import in 2007-2011\*, tons

Schedule 35. Dynamics of the volume of Russian dried vegetables and mushrooms import in 2007-2011\*, ths dollars

Table 22. Volumes of Russian import of canned vegetables and mushrooms for short-term storage, by supplying countries in 2007-2011, tons

Diagram 26. Structure of Russian dried vegetables and mushrooms import by countries of origin in physical terms in 2011, %

Table 23. Volumes of Russian import of canned vegetables and mushrooms for short-term storage, by supplying countries in 2007-2011, ths dollars

Diagram 27. Structure of Russian dried vegetables and mushrooms import by countries of origin in cost terms in 2011, %

## **10. ANALYSIS OF RUSSIAN CANNED VEGETABLES EXPORT (IN GENERAL)**

Schedule 36. Dynamics of the volume of Russian canned vegetables export in 2007-2011\*, tons

Schedule 37. Dynamics of the volume of Russian canned vegetables export in 2007-2011\*, ths dollars

Diagram 28. Structure of Russian canned vegetables export by categories in physical terms in 2011, %

Table 24. Volumes of Russian canned vegetables export by categories in 2007-2011, tons

Diagram 29. Structure of Russian canned vegetables export by categories in cost terms in 2011, %

Table 25. Volume of Russian canned vegetables export by categories in 2007-2011, ths dollars

## **11. ANALYSIS OF RUSSIAN CANNED VEGETABLES EXPORT BY SEGMENTS**

Schedule 38. Dynamics of the volume of Russian natural canned vegetables except tomato and mushrooms export, in 2007-2011\*, tons

Schedule 39. Dynamics of the volume of Russian natural canned vegetables except tomato and mushrooms export in 2007-2011\*, ths dollars

Schedule 40. Dynamics of the volume of Russian natural canned vegetables except tomato and mushrooms export by months in 2007-2011, tons

Schedule 41. Dynamics of the volume of Russian natural canned vegetables except tomato and mushrooms export, by months in 2007-2011, ths dollars

Diagram 30. Structure of Russian natural canned vegetables except mushrooms and tomato export, by types in physical terms in 2011, %

Table 26. Volume of Russian natural canned vegetables except mushrooms and tomato export, by types in 2007-2011, tons

Diagram 31. Structure of Russian natural canned vegetables except mushrooms and tomato export, by types in cost terms in 2011, %

Table 27. Volumes of Russian natural canned vegetables except mushrooms and tomato export, by types in 2007-2011, ths dollars

Table 28. Volumes of Russian natural canned vegetables except mushrooms and tomato export, by countries of destination in 2007-2011, tons

Diagram 32. Structure of Russian natural canned vegetables except tomato and mushrooms export, by countries of destination in physical terms in 2011, %

Table 29. Volume of Russian natural canned vegetables except mushrooms and tomato export, by countries of destination in 2007-2011, ths dollars

Diagram 33. Structure of Russian natural canned vegetables except tomato and mushrooms export, by countries of destination in cost terms in 2011, %

Schedule 42. Dynamics of the volume of Russian export of vegetables and mushrooms canned with vinegar, in 2007-2011\*, tons

Schedule 43. Dynamics of the volume of Russian export of vegetables and mushrooms canned with vinegar, in 2007-2011\*, ths dollars

Schedule 44. Dynamics of the volume of Russian export of vegetables and mushrooms canned with vinegar, by months in 2007-2011, tons

Schedule 45. Dynamics of the volume of Russian export of vegetables and mushrooms canned with vinegar, by months in 2007-2011, ths dollars

Table 30. Volume of Russian export of vegetables and mushrooms canned with vinegar, by countries of destination in 2007-2011, tons

Diagram 34. Structure of Russian export of vegetables and mushrooms canned with vinegar, by countries of destination in physical terms in 2011, %

Table 31. Volume of Russian export of vegetables and mushrooms canned with vinegar, by countries of destination in 2007-2011, ths dollars

Diagram 35. Structure of Russian export of vegetables and mushrooms canned with vinegar, by countries of destination in cost terms in 2011, %

Schedule 46. Dynamics of the volume of Russian export of vegetables and mushrooms canned for short-term storage, in 2007-2011\*, tons

Schedule 47. Dynamics of the volume of Russian export of vegetables and mushrooms canned for short-term storage, in 2007-2011\*, ths dollars

Table 32. Volume of Russian export of vegetables and mushrooms canned for short-term storage, by countries of destination in 2007-2011, tons

Diagram 36. Structure of Russian export of vegetables and mushrooms canned for short-term storage, by countries of destination in cost terms in 2011, %

Table 33. Volume of Russian export of vegetables and mushrooms canned for short-term storage, by countries of destination in 2007-2011, ths dollars

Diagram 37. Structure of Russian export of vegetables and mushrooms canned for short-term storage, by countries of destination in cost terms in 2011, %

## **12. PRODUCER PRICES FOR CANNED VEGETABLES**

Schedule 48. Dynamics of average producer prices for canned vegetables in RF in 2007-2011\*, rub/ths standard cans

Schedule 49. Dynamics of average producer prices for canned vegetables in RF by months in 2007-2011, rub/ths standard cans

Table 34. The average producer prices for canned vegetables in RF by months in 2007-2011, rub/ths standard cans

Schedule 50. Dynamics of average producer prices for tomato puree in RF in 2010-2011, rub/ths standard cans

Schedule 51. Dynamics of average producer prices for tomato puree in RF by months in 2010-2011, rub/ths standard cans

Table 35. The average producer prices for tomato puree in RF by months in 2010-2011, rub/kg

## **13. RETAIL PRICES FOR CANNED VEGETABLES**

Schedule 52. Dynamics of average retail prices for snack and dinner canned vegetables in RF in 2007-2011\*, rub/kg

Schedule 53. Dynamics of average retail prices for snack and dinner canned vegetables by months in RF in 2007-2011\*, rub/kg

Table 36. The average retail prices for snack and dinner canned vegetables in RF by months in 2007-2011, rub/kg

Schedule 54. Dynamics of average retail prices for pickled canned vegetables in RF in 2007-2011\*, rub/kg

Schedule 55. Dynamics of average retail prices for pickled canned vegetables in RF by months in 2007-2011, rub/kg

Table 37. The average retail prices for pickled canned vegetables in RF by months in 2007-2011, rub/kg

Schedule 56. Dynamics of average retail prices for canned vegetables for children in RF in 2007-2011\*, rub/kg

Schedule 57. Dynamics of average retail prices for canned vegetables for children in RF by months in 2007-2011, rub/kg

Table 38. The average retail prices for canned vegetables for children in RF by months in 2007-2011, rub/kg

Schedule 58. Dynamics of average retail prices for canned tomato in RF in 2007-2011\*, rub/kg

Schedule 59. Dynamics of average retail prices for canned tomato in RF by months in 2010-2011, rub/kg

Table 39. The average retail prices for canned tomato in RF by months in 2007-2011, rub/kg

#### **14. CONSUMER PREFERENCES ON THE CANNED VEGETABLES MARKET**

Schedule 60. Consumer preferences of Russians by canned vegetables brands in 2011, %

#### **15. PROFILES OF THE LARGEST ENTERPRISES PRODUCING CANNED VEGETABLES**

Table 40. Shareholders/founders of «Bonduelle-Kuban» LLC

Table 41. Subsidiaries of «Bonduelle-Kuban» LLC

Table 42. Balance sheet of «Bonduelle-Kuban» LLC, ths rubles

Table 43. Profit and loss statement of «Bonduelle-Kuban» LLC, ths rubles

Table 44. Cash flow statement of «Bonduelle-Kuban» LLC, ths rubles

Table 45. Financials of «Bonduelle-Kuban» LLC

Table 46. Shareholders of «Khladokombinat Zapadny» JSC

Table 47. Subsidiaries of «Khladokombinat Zapadny» JSC

Table 48. Balance sheet of «Khladokombinat Zapadny» JSC, ths rubles

Table 49. Profit and loss statement of «Khladokombinat Zapadny» JSC, ths rubles

Table 50. Cash flow statement of «Khladokombinat Zapadny» JSC, ths rubles

Table 51. Financials of «Khladokombinat Zapadny» JSC

Table 52. Shareholders/founders of «Polyanoe» JSC

Table 53. Subsidiaries of «Polyanoe» JSC

Table 54. Balance sheet of «Polyanoe» JSC, ths rubles

Table 55. Profit and loss statement of «Polyanoe» JSC, ths rubles

Table 56. Cash flow statement of «Polyanoe» JSC, ths rubles

Table 57. Financials of «Polyanoe» JSC

Table 58. Number of personnel of «Baltimor Krasnodar» LLC, people

Table 59. Shareholders/founders of «Baltimor Krasnodar» LLC

Table 60. Production volumes of «Baltimor Krasnodar» LLC

Table 61. Balance sheet of «Baltimor Krasnodar» LLC, ths rubles

Table 62. Profit and loss statement of «Baltimor Krasnodar» LLC, ths rubles

Table 63. Cash flow statement of «Baltimor Krasnodar» LLC, ths rubles

Table 64. Financials of «Baltimor Krasnodar» LLC

Table 65. Shareholders/founders of «Poltavskie konservy» JSC

Table 66. Subsidiaries of «Poltavskie konservy» JSC

Table 67. Balance sheet «Poltavskie konservy» JSC, ths rubles

Table 68. Profit and loss statement of «Poltavskie konservy» JSC, ths rubles

Table 69. Cash flow statement of «Poltavskie konservy» JSC, ths rubles

Table 70. Financials of «Poltavskie konservy» JSC

#### **16. FORECAST OF THE RUSSIAN CANNED VEGETABLES DEVELOPMENT FOR 2012-2015**

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**