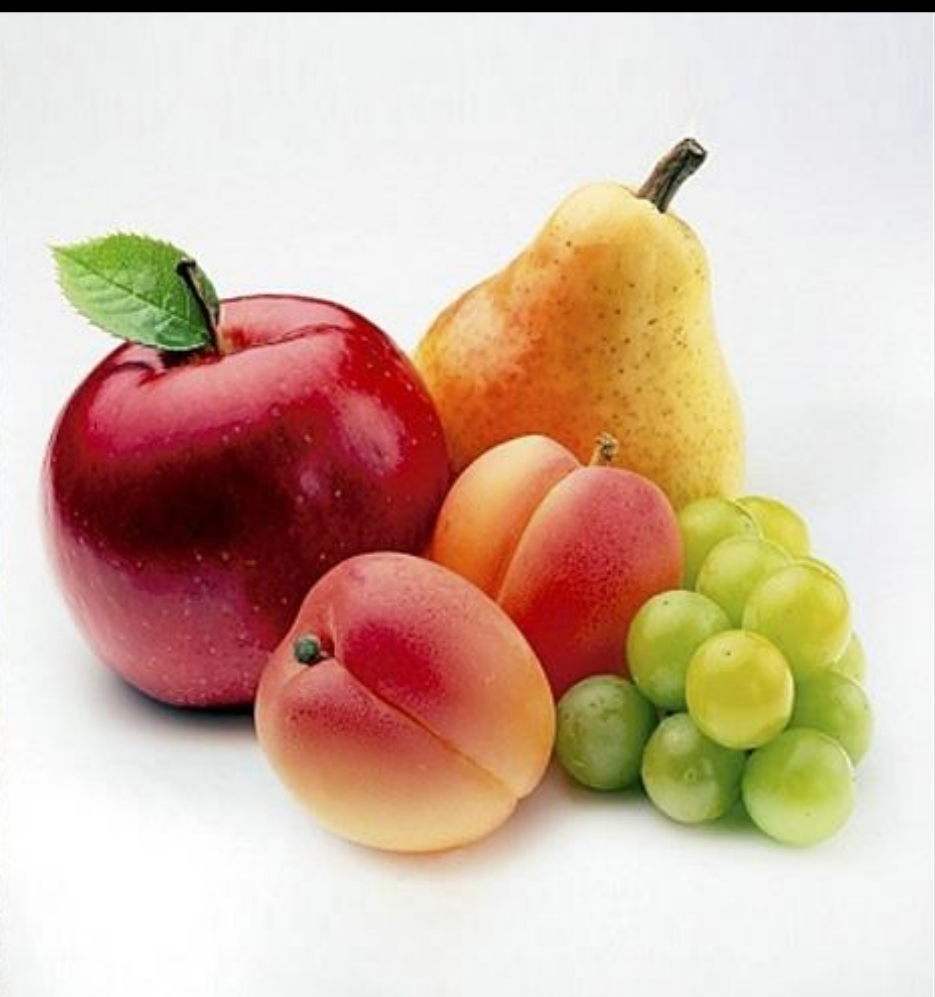




**Intesco
Research
Group**

FRESH FRUIT AND BERRIES AND MARKET OF FRESH FRUIT AND BERRIES



MOSCOW 2014

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

FRESH FRUIT AND BERRIES MARKET

GOAL OF RESEARCH:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2014-2016

REGIONS OF RESEARCH:

COUNTRIES OF THE WORLD

RUSSIA

REGIONS OF RF

MAIN BLOCKS OF RESEARCH:

WORLD MARKET OF FRESH FRUIT AND BERRIES

ANALYSIS OF FRESH FRUIT AND BERRIES RETAIL SALES IN RUSSIA

VOLUME OF RUSSIAN FRESH FRUIT AND BERRIES MARKET

AREA OF FRUIT AND BERRIES CULTIVATION IN RUSSIA

YIELD OF FRUIT AND BERRIES IN RUSSIA

GROSS YIELD OF FRUIT AND BERRIES IN RUSSIA

LARGEST RUSSIAN PRODUCERS OF FRESH FRUIT AND BERRIES

LARGEST PLAYERS OF THE RUSSIAN FRESH FRUIT AND BERRIES MARKET

ANALYSIS OF RUSSIAN FRUIT AND BERRIES EXPORT

ANALYSIS OF RUSSIAN FRUIT AND BERRIES IMPORT

PRODUCER PRICES FOR FRUIT IN RUSSIA

RETAIL PRICES ON FRUIT AND BERRIES MARKET IN RUSSIA

FACTORS INFLUENCING RUSSIAN MARKET OF FRUIT AND BERRIES

TRENDS ON RUSSIAN MARKET OF FRUIT AND BERRIES STATE

REGULATION OF RUSSIAN MARKET OF FRUIT AND BERRIES

CONSUMER PREFERENCES ON FRUIT AND BERRIES MARKET

FORECAST OF FRUIT AND BERRIES MARKET FOR 2014-2016

Types of fruit and berries researched:

Pineapples	Strawberry and wild strawberry
Oranges	Cranberry and blackberry
Watermelons	Lemons
Bananas	Raspberry and brambleberry
Grape	Tangerines
Cherry and black cherry	Peaches and nectarines
Melons	Plums
Pears	Apples
Kiwi	

Largest companies with profiles:

«NPG «SADY PRIDONYA» JSC
«SAD GIGANT» JSC
«AGROFIRMA IM. 15 LET OKTYABRYA» JSC
«TSENTRALNO-CHERNOZEMNAYA PLODOVO-YAGODNAYA KOMPANIYA» JSC
«OSTROGOZHSKSADPITOMNIK» JSC

Information sources used:

Federal State Statistics Service
Ministry of Agriculture
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 presents 93 schedules, 46 diagrams and 100 tables.

EXTRACTS FROM RESEARCH

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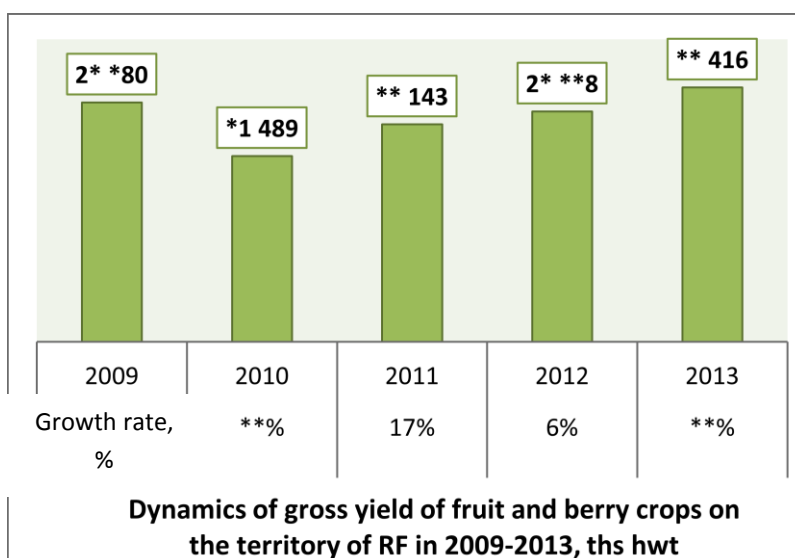
GROSS YIELDS OF FRUIT AND BERRIES CROPS IN RUSSIA

In 2010 gross collecting of fruit and berry crops volumes decreased sharply by **% or ** thousand centners compared to 2009. As it was earlier marked, abnormally hot and droughty weather in July-August, 2010 became the main reason for reduction of gardens and berry-pickers yield. Nevertheless, since 2011 positive dynamics of the surveyed parameter established: volumes of gross collecting increased – by **% in 2011, by **% in 2012.

Following the results of 2013 in Russia 29 416 thousand centners of fruits and berries were collected. It was **% or ** thousand centners more, than in 2012. By the way, volume of the crop received in 2013, for the first time exceeded the parameter of 2009 equal to 27 680 thousand centners.

In structure of gross fruit and berry crops collecting pomaceous are the leaders. Their share in total amount of crops in 2013 was equal to **%. More than a quarter belongs to berry-gardens – **%.

Gross yield of stone fruit crops occupies 17,5% in structure of the cumulative crop of fruit and berry plants. Nucicultures, subtropical and citrus fruit crops belonging to the category of other have more than **%.

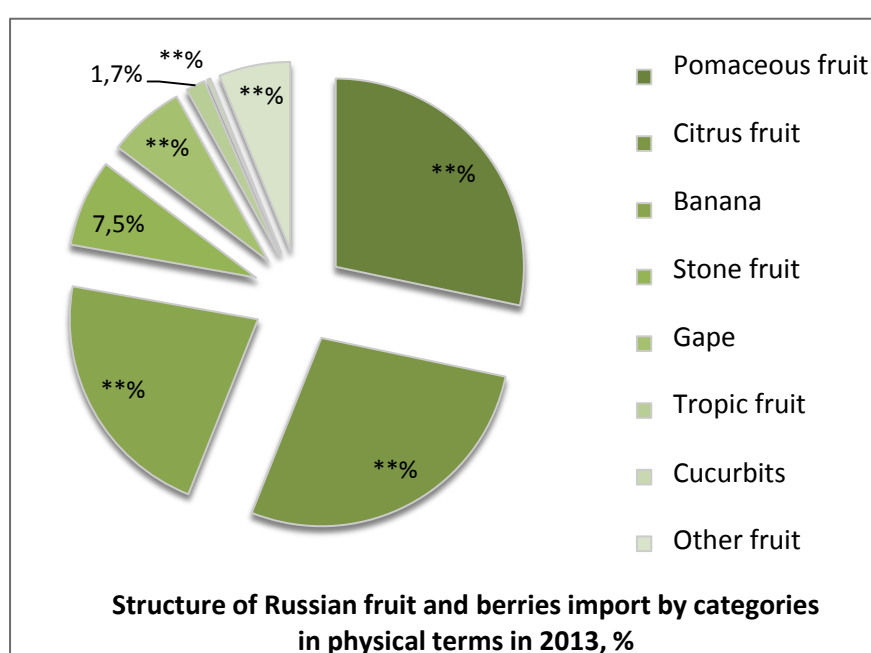
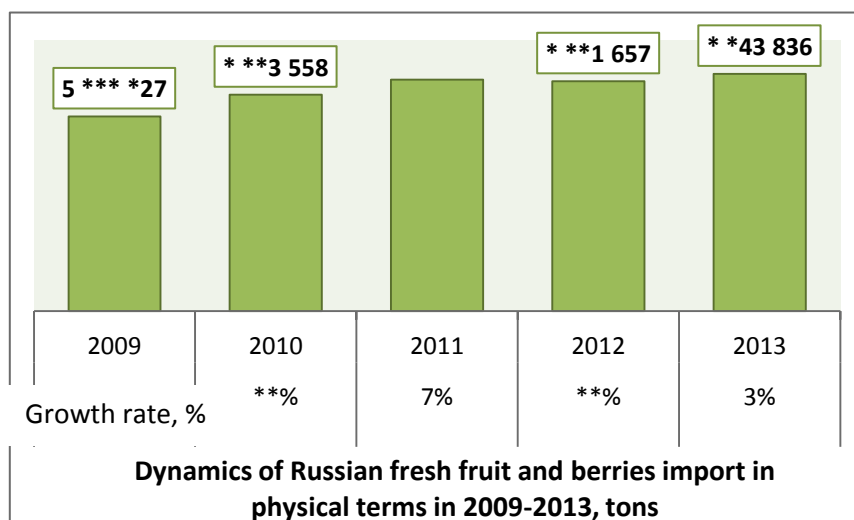


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ANALYSIS OF RUSSIAN FRUIT
AND BERRIES IMPORT

Volume of fruit import to our country in 2009-2011 increased gradually. The greatest rate of growth of fresh fruit and berry products import in 2010 was marked and made **%. Two years later import reduced slightly: by **% or ** thousand tons. For last year Russia imported ** million tons of fruit and berry products.

Gross domestic collecting of fruit and berry products makes one third of all the demand for fresh fruit on the domestic market, so Russia annually imports **_** tons of



products.

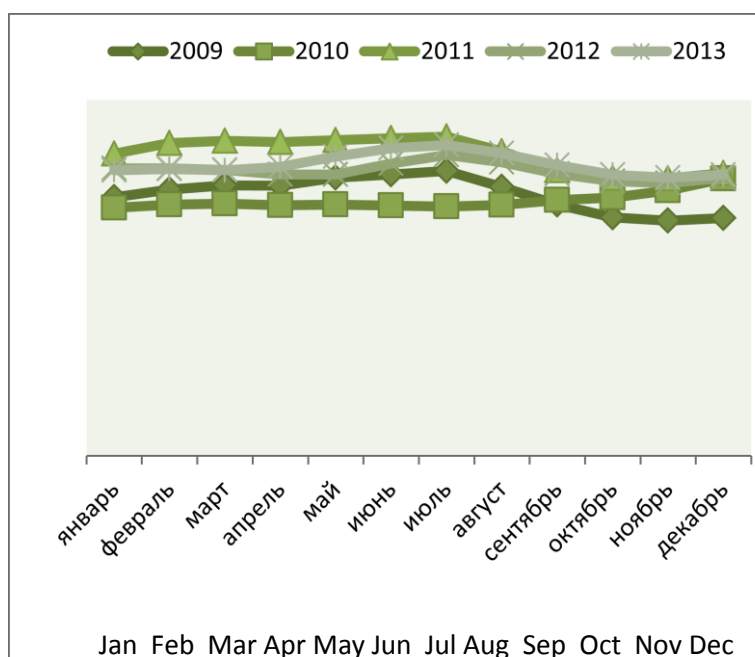
In structure of Russian fruit import the largest volumes belonged to three types of products: banana, apples and pears and citrus fruit. Their aggregate share in 2013 amounted *%.

CHAPTER 14

RETAIL PRICES ON THE
MARKET OF FRUIT AND
BERRIES IN RUSSIA

The average price for a kilogram of apples in Russia in 2013 made ** rubles, it was ** rub/kg more, than in 2012. Negative rate of growth of retail price for this type of fruit and berry products in 2010 and 2012 was marked. Thus the increase in average cost of kilogram of these fruits was marked not only in 2013: so, in 2011 retail price increased by **% and reached ** rub/kg.

In 2009 and during 2011-2013 dynamics of retail prices was characterized by gradual increase of average price for a kilogram of apples in January-July, however in the second half of the year the price for these products start falling as on counters of shops there is rather inexpensive domestic crop.



In general, in 2013 average prices for this type of fruit and berry products increased. Thus, in April-September, 2013 the price for a kilogram of this fruit was on the average **% more, than in the similar period of 2012.

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