



**Intesco
Research
Group**

FRESH VEGETABLES AND RUSSIAN MARKET OF FRESH VEGETABLES



MOSCOW 2014

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	8
EXTRACTS FROM RESEARCH.....	10
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES.....	14
ABOUT INTESCO RESEARCH GROUP.....	25

CONTENTS

RESERCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS AND TABLES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

1.1. Population of Russia

Dynamics of population

Largest cities

Social standards of living dynamics

Economic activity

1.2. Economic situation

Dynamics of economy development

Stability of the state budget

1.3. Position of Russia in the world

Share of RF in the world population

2. SUBJECT OF RESEARCH

2.1. Definition

2.2. Classification

All-Russian Classification of Economic Activities and Products

Russian National Classifier of Economic Activities

Commodity Nomenclature of Foreign Economic Activity

Other classifications

3. WORLD MARKET OF FRESH VEGETABLES

3.1. Cultivated areas

Dynamics of cultivated areas

Structure of cultivated areas

3.2. Production of vegetables

Dynamics of production

Structure of production

3.3. Production of tomatoes

Dynamics of production

Structure of production

3.4. Production of onion

Dynamics of production

Structure of production

3.5. Production of potato

Dynamics of production

Structure of production

- 4. ANALYSIS OF RETAIL SALES OF FRESH VEGETABLES**
 - 4.1. Dynamics of retail sales by years
 - 4.2. Dynamics of retail sales by quarters
 - 4.3. Structure of retail sales by federal districts
 - 4.4. Largest regions of RF by retail sales
- 5. VOLUME OF RUSSIAN MARKET OF FRESH VEGETABLES**
 - 5.1. Dynamics of market volumes by years
 - 5.2. Import content on the market
 - 5.3. Per capita consumption
 - 5.4. Segmentation of the market
- 6. TRENDS ON RUSSIAN MARKET OF FRESH VEGETABLES**
- 7. FACTORS INFLUENCING FRESH VEGETABLES MARKET**
- 8. STATE REGULATIONS OF THE MARKET**
- 9. LARGEST PLAYERS ON FRESH VEGETABLES MARKET**
- 10. CULTIVATED AREAS UNDER FRESH VEGETABLES**
 - 10.1. Dynamics of cultivated areas under vegetables
 - 10.2. Dynamics of areas under glass by years
- 11. RUSSIAN PRODUCTION OF FRESH VEGETABLES**
 - 11.1. Dynamics of production volumes by years
 - 11.2. Dynamics of production volumes by months
 - 11.3. Structure of production by type of products
 - 11.4. Production volumes by federal districts of RF
 - 11.5. Structure of production by federal districts of RF
 - 11.6. Production volumes in regions of RF
 - 11.7. Regional production structure
- 12. LARGEST RUSSIAN PRODUCERS OF FRESH VEGETABLES**
 - 12.1. By proceeds volume
- 13. RUSSIAN EXPORT OF FRESH VEGETABLES**
 - 13.1. Total export
 - Export dynamics by years*
 - Export dynamics by months*
 - Export structure*
 - 13.2. Export of potato
 - Export dynamics by years*
 - Export dynamics by months*
 - Export structure*
 - 13.3. Export of other vegetables
 - Export dynamics by years*
 - Export dynamics by months*

Export structure

14. RUSSIAN IMPORT OF FRESH VEGETABLES

14.1. Total import

Import dynamics by years

Import dynamics by months

Import structure

14.2. Import of tomatoes

Import dynamics by years

Import structure

14.3. Import of potato

Import dynamics by years

Import structure

14.4. Import of onion

Import dynamics by years

Import structure

14.5. Import of other vegetables

Import dynamics by years

Import structure

15. PRODUCER PRICES FOR FRESH VEGETABLES

15.1. Dynamics of producer prices by years

15.2. Dynamics of producer prices by months

16. RETAIL PRICES FOR FRESH VEGETABLES

16.1. Dynamics of retail prices by years

16.2. Dynamics of retail prices by months

17. FORECAST OF FRESH VEGETABLES MARKET DEVELOPMENT UNTIL 2020

18. PROFILES OF THE LARGEST ENTERPRISES

18.1. «Agrokombinat «Moskovskiy» JSC

Reference information

Types of activity

Subsidiaries

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

18.2. «Agrokombinat «Yuzhniy» JSC

Reference information

Types of activity

Subsidiaries

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

18.3. «Teplichny kombinat «Mayskiy» LLC

Reference information

Types of activity

Subsidiaries

Balance sheet

Profit and loss statement

Cash flow statement

Financials

18.4. «Alekseevskiy» State Unitary Agricultural enterprise

Reference information

Types of activity

Subsidiaries

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

18.5. «Agrokombinat «Teplichny» JSC

Reference information

Types of activity

Subsidiaries

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

18.6. «Plemzavod»Detskoselskiy» APC

Reference information

Types of activity

Subsidiaries

Production volumes

Balance sheet

Profit and loss statement

Cash flow statement

Financials

ABOUT INTESCO RESEARCH GROUP

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

FACTORS INFLUENCING FRESH VEGETABLES MARKET

STATE REGULATIONS OF THE MARKET

LARGEST PLAYERS ON THE MARKET OF FRESH VEGETABLES

CULTIVATED AREAS UNDER FRESH VEGETABLES

RUSSIAN PRODUCTION OF FRESH VEGETABLES

LARGEST RUSSIAN PRODUCERS OF FRESH VEGETABLES

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

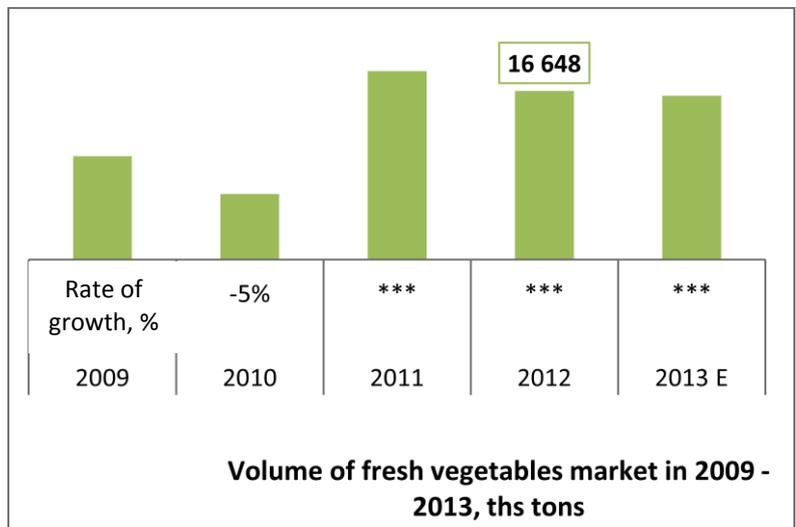
The research contains 100 schedules, 48 diagrams, 51 tables, 7 schemes

EXTRACTS FROM RESEARCH

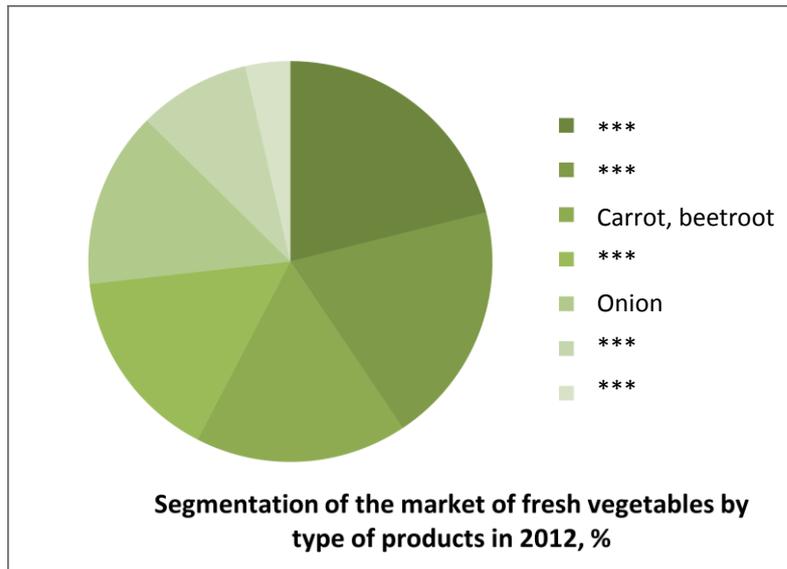
CHAPTER 5

VOLUME OF RUSSIAN FRESH VEGETABLES MARKET

From 2009 to 2013, volume of fresh vegetables market increased by over 100%. This parameter was reached in 2010 due to a decrease by over 5%, and in 2011 the parameter amounted to 16,5 mln tons that was 1% more than in 2010. In 2012 volume of fresh vegetables market amounted to 16,5 mln tons, that was 1% more than in 2011.



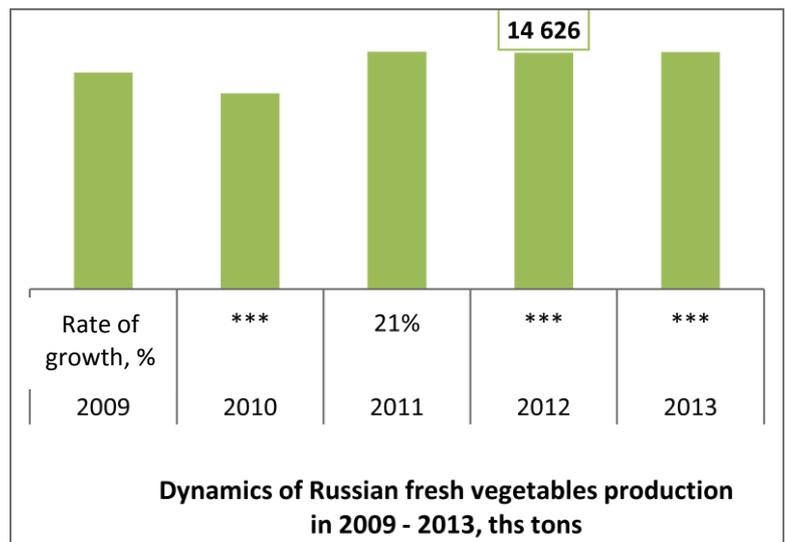
Market of fresh vegetables in Russia more than half is represented by four crops: potato (21%), onion (15%), carrot and beetroot (14%). Potato also has a significant share of total volume – 14%. Russian vegetables, grown in Russia have 10% of the market.



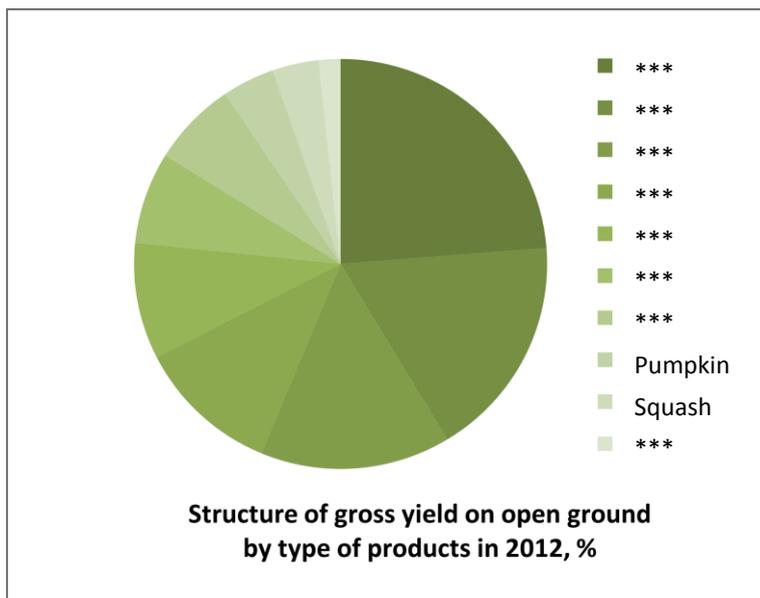
CHAPTER 11

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.

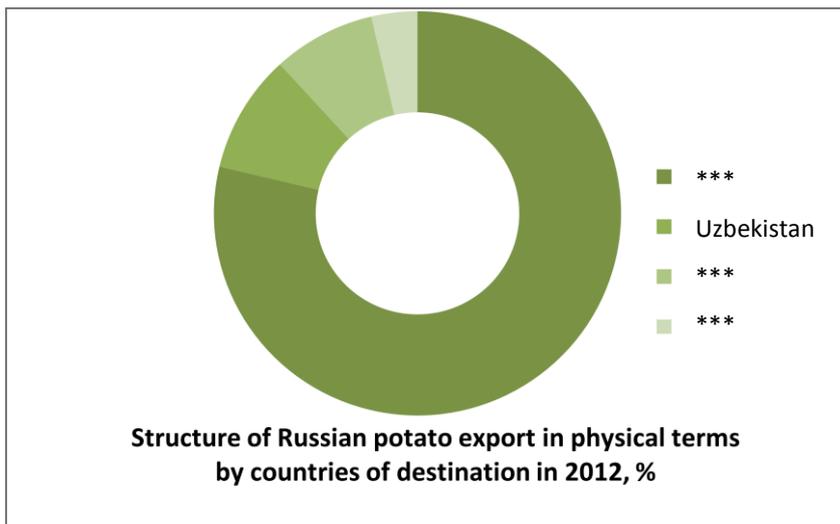
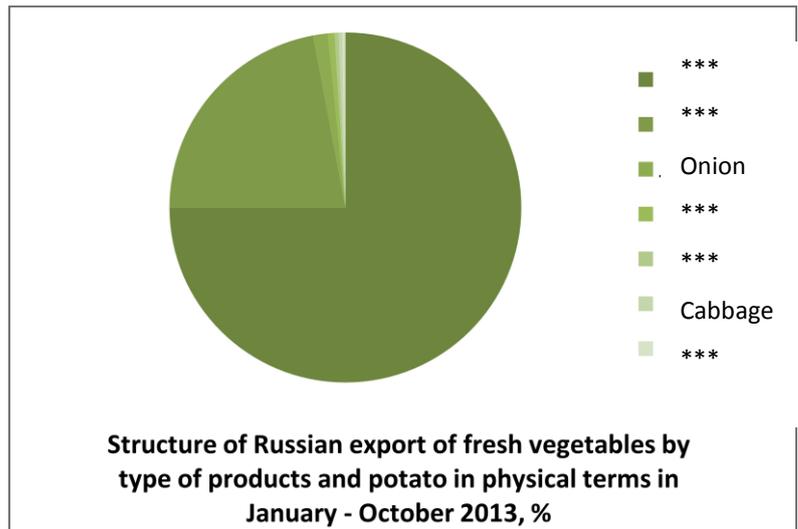


CHAPTER 13

RUSSIAN EXPORT OF FRESH VEGETABLES

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.

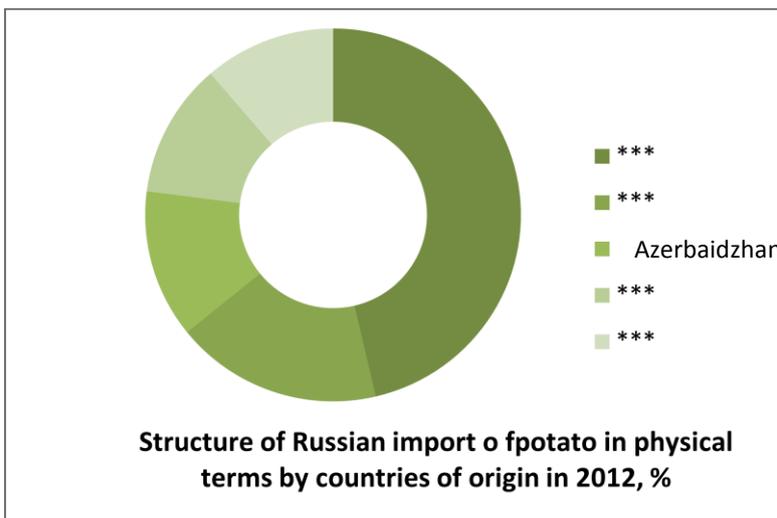
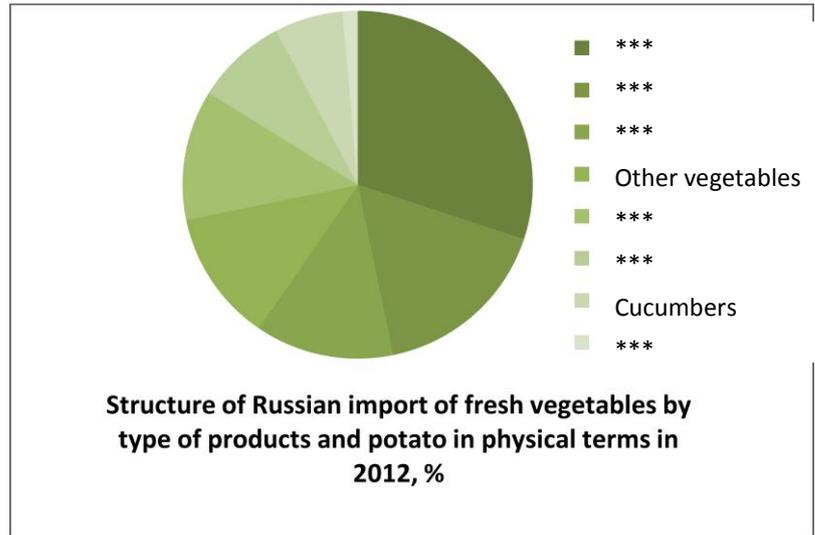


CHAPTER 14

RUSSIAN IMPORT OF FRESH VEGETABLES

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.



LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Dynamics of resident population number of Russia in 1990, 2000, 2005 and 2008-2012, ths people

Schedule 2. Dynamics of population of Russia in three forecast variants in 2011-2031, ths people

Diagram 1. Structure of population of Russia by working age in 2011-2031, % (average forecast variant)

Table 1. Number of population in largest cities of Russia according to Census of 2002 and 2010 and as for January 1, 2013, ths people

Schedule 3. Dynamics of actual household disposable income of population and annual rate of growth in 2000-2012, %

Schedule 4. Dynamics of demographic load coefficient in three forecast variants in 2011-2031

Diagram 2. Dynamics of the number of employed and unemployed people in Russia in 2000-2012 and forecast for 2013-2015, mln people

Schedule 5. Dynamics of share of the unemployed in economically active population by federal districts of RF in 2006-2012, %

Schedule 6. Dynamics of GDP of Russia in prices of 2008 in 2002-2012 and forecast for 2013-2015, billion rubles

Schedule 7. Investments into the fixed capital of RF in 2002-2012 and forecast for 2013-2015, billion rubles

Schedule 8. Dynamics of surplus/deficit of consolidated budget of RF in 2006-2012, % of GDP

Schedule 9. Dynamics of total external debt of RF and its share in GDP in 2009-2013 (as for 1 January), mln dollars

Diagram 3. Change of structure of external debt of RF in 2009-2013 (as for 1 January), %

Schedule 11. Dynamics of population of Russia and world in 2000-2012 and forecast up to 2100, mln people

Schedule 12. Share of RF in the world GDP in 2001-2012 and forecast for 2013-2016, %

2. SUBJECT OF RESEARCH

Scheme 1. Classification of tomatoes

Scheme 2. Classification of cucumbers

Scheme 3. Other classifications of vegetables

Scheme 4. Types of vegetative vegetables

Scheme 5. Types of fruited vegetables

3. WORLD MARKET OF FRESH VEGETABLES

Schedule 13. Dynamics of cultivated areas under vegetables, in the world in 2008-2012, ths ha

Schedule 14 Dynamics of cultivated areas, under potato, in the world in 2008-2012, ths ha

Diagram 4. Structure of cultivated areas under vegetables, by type of products in the world in 2012, %

Diagram 5. Structure of cultivated areas under vegetables, in the world by countries in 2012, %

Diagram 6 Structure of cultivated areas, under potato, by countries in 2012, %

Schedule 15. Dynamics of world vegetables production in 2008 - 2012, ths tons

Diagram 7. Structure of world vegetables production by type of products in 2012, %

Diagram 8 Structure of world vegetables production by countries in 2012, %

Schedule 16. Dynamics of world tomato production in 2008 - 2012, ths tons

Table 2. Structure of world tomato production by countries in 2008 - 2012, ths tons

Diagram 9. Structure of world tomato production by countries in 2012, %

Diagram 10. Change of structure of world tomato production by countries in 2008 - 2012, %

Schedule 17. Dynamics of world onion production in 2008 - 2012, ths tons

Table 3. Structure of world onion production by countries in 2008 - 2012, ths tons

Diagram 11. Structure of world onion production by countries in 2012, %

Diagram 12. Change of structure of world onion production by countries in 2008 - 2012, %

Schedule 18. Dynamics of world potato production in 2008 - 2012, ths tons

Table 4. Structure of world potato production by countries in 2008 - 2012, ths tons

Diagram 13. Structure of world potato production by countries in 2012, %

Diagram 14. Change of structure of world potato production by countries in 2008 - 2012, %

4. ANALYSIS OF RETAIL PRICES FOR FRESH VEGETABLES

Schedule 19. Dynamics of retail sales of fresh vegetables in 2009 - 2013*, billion rubles

Schedule 20 Dynamics of potato retail sales in 2009 - 2013*, billion rubles

Schedule 21. Dynamics of fresh vegetables share in turnover structure

in 2005 - 2013*, %

Schedule 22 Dynamics of potato share in turnover structure in 2005 - 2013*, %

Schedule 23. Dynamics of retail sales of fresh vegetables by quarters

in 2012 - 2013, billion rubles

Schedule 24 Dynamics of potato retail sales by quarters in 2012 - 2013*, billion rubles

Table 5. Volumes of fresh vegetables retail sales by federal districts

in 2012 – January - September 2013, billion rubles

Table 6 Volumes of potato retail sales by federal districts in 2012 – January – September

2013, billion rubles

Diagram 15. Structure of retail sales of fresh vegetables by federal districts in January – September 2013, %

Diagram 16 Structure of potato retail sales by federal districts in January - September 2013, %

Table 7. Volumes of fresh vegetables retail sales by regions in 2012 – January - September 2013, billion rubles

Table 8 Volumes of potato retail sales by regions in 2012 - January – September 2013, billion rubles

Diagram 17. Structure of retail sales of fresh vegetables by regions

in January - September 2013, %

Diagram 18 Structure of potato retail sales by regions in January - September 2013, %

5. VOLUME OF THE RUSSIAN MARKET OF FRESH VEGETABLES

Schedule 25 Dynamics of fresh vegetables market volume in 2009 - 2013*, ths tons

Schedule 26 Dynamics of potato market volume in 2009 - 2013*, ths tons

Diagram 19 Import content on the market of fresh vegetables in 2013*, %

Diagram 20 Import content on potato market in 2013*, %

Schedule 27 Dynamics of import content on the market of fresh vegetables in 2009-2013*, %

Schedule 28 Dynamics of import content on potato market in 2009-2013*, %

Schedule 29 Dynamics of per capita fresh vegetables consumption

in 2009 - 2013*, kg/person

Schedule 30 Dynamics of per capita potato consumption in 2009 - 2013*, kg/person

Diagram 21 Segmentation of the market of fresh vegetables by type of products in 2012, %

Schedule 31 Change of fresh vegetables market segmentation by type of products

in 2009 - 2012, %

6. TRENDS ON THE RUSSIAN MARKET OF FRESH VEGETABLES

Schedule 32. Provisions of population with main types of vegetables in Russia in 2012, %

7. FACTORS INFLUENCING FRESH VEGETABLES MARKET

8. STATE REGULATIONS OF THE MARKET

9. LARGEST PLAYERS ON THE MARKET OF FRESH VEGETABLES

Table 9. Operating capabilities of greenhouse centers

10. CULTIVATED AREAS UNDER FRESH VEGETABLES

Schedule 33 Dynamics of cultivated areas under vegetables and share of vegetables in total cultivated area in 2009 - 2013, ths ha

Schedule 34 Dynamics of cultivated areas under potato and share of potato in total cultivated area in 2009 - 2013, ths ha

Scheme 6. Map of distribution of cultivated areas under vegetables on the territory of the country in 2013

Scheme 7. Map of distribution of cultivated areas, under potato, on the territory of the country in 2013

Schedule 35 Dynamics of heated houses area in Russia in 2009 – January-September 2013, ths ha

Schedule 36 Dynamics of commissioning (due to construction and reconstruction) of total amount of greenhouse centers, film greenhouses and greenhouses under glass by years in 2009 – January - September 2013, ha

Schedule 37 Change of structure of commissioning (due to construction and reconstruction) of greenhouse centers, film greenhouses and greenhouses under glass by types of objects in 2009 – January-September 2013, ha

Schedule 38 Change of structure of commissioning (due to construction and reconstruction) of greenhouse centers, film greenhouses and greenhouses under glass by federal districts in 2009 – January - September 2013, ha

11. RUSSIAN PRODUCTION OF FRESH VEGETABLES

Schedule 39 Dynamics of Russian vegetables production in 2009 - 2013, ths tons

Schedule 40 Dynamics of Russian potato production in 2009 - 2013, ths tons

Schedule 41 Dynamics of Russian vegetables production by months in 2012 - 2013, ths tons

Schedule 42 Dynamics of Russian potato production by months in 2012 - 2013, ths tons

Diagram 22 Structure of gross yield of field vegetables by type of products in 2012, %

Schedule 43 Change of structure of gross yield of field vegetables by type of products in 2008-2012, %

Table 10. Production volumes of fresh vegetables by federal districts in 2009 - 2013, ths tons

Table 11 Volumes of potato production by federal districts in 2009 - 2013, ths tons

Diagram 23. Structure of Russian vegetables production by federal districts in 2013, %

Diagram 24 Structure of Russian potato production by federal districts in 2013, %

Diagram 25. Change of structure of Russian vegetables production by federal districts in 2009 - 2013, %

Diagram 26 Change of structure of Russian potato production by federal districts in 2009 - 2013, %

Table 12. Production volumes of fresh vegetables by regions in 2009 – 2013, ths tons

Table 13. Volumes of potato production by regions in 2009 - 2013, ths tons

Diagram 27. Structure of Russian vegetables production by regions in 2013, %

Diagram 29. Change of structure of Russian vegetables production by regions in 2009 - 2013, %

Diagram 30 Change of structure of Russian potato production by regions in 2009 - 2013, %

12. LARGEST RUSSIAN PRODUCERS OF FRESH VEGETABLES

Table 14. Proceeds of the largest vegetables producers in 2008-2012, ths rubles

Diagram 31. Structure of proceeds of vegetables growing industry by largest enterprises in 2012, %

Diagram 32 Structure of proceeds of vegetables growing industry by regions in 2012, %

13. RUSSIAN EXPORT OF FRESH VEGETABLES

Schedule 44 Dynamics of Russian export of fresh vegetables and potato in physical terms by years in 2009 - 2013*, tons

Schedule 45 Dynamics of Russian export of fresh vegetables and potato in cost terms in 2009 - 2013*, ths dollars

Schedule 46 Dynamics of Russian export of fresh vegetables and potato in physical terms by months in 2011 - January - October 2013, tons

Schedule 47 Dynamics of Russian export of fresh vegetables and potato in money terms by months in 2011 - January - October 2013, ths dollars

Diagram 33 Structure of Russian export of fresh vegetables by type of products and potato in physical terms in January - October 2013, %

Diagram 34 Structure of Russian export of fresh vegetables by type of products and potato in cost terms in January - October 2013, %

Schedule 48 Change of structure of Russian export of fresh vegetables by type of products and potato in physical terms in 2009 - January - October 2013, %

Schedule 49 Change of structure of Russian export of fresh vegetables by type of products and potato in cost terms in 2009 - January - October 2013, %

Schedule 50. Dynamics of Russian potato export in physical terms by years in 2009 - 2013*, tons

Schedule 51. Dynamics of Russian potato export in cost terms by years in 2009 - 2013*, ths dollars

Schedule 52. Dynamics of Russian potato export in physical terms by months in 2011 - January - October 2013, tons

Schedule 53. Dynamics of Russian potato export in money terms by months in 2011 - January - October 2013, ths dollars

Diagram 35. Structure of Russian potato export in physical terms by countries of destination in 2012, %

Diagram 36. Structure of Russian potato export in cost terms by countries of destination in 2012, %

Schedule 54 Change of structure of Russian potato export in physical terms by countries of destination in 2009 - 2012, %

Schedule 55 Change of structure of Russian potato export in cost terms by countries of destination in 2009 - 2012, %

Schedule 56 Dynamics of Russian other vegetables export in physical terms by years in 2009 - 2013*, tons

Schedule 57 Dynamics of Russian other vegetables export in cost terms by years in 2009 - 2013*, ths dollars

Schedule 58 Dynamics of Russian other vegetables export in physical terms by months in 2011 - January - October 2013, tons

Schedule 59. Dynamics of Russian other vegetables export in cost terms by months in 2011 - January - October 2013, ths dollars

Diagram 37. Structure of Russian other vegetables export in physical terms by countries of destination in 2012, %

Diagram 38. Structure of Russian other vegetables export in cost terms by countries of destination in 2012, %

Schedule 60 Change of structure of Russian other vegetables export in physical terms by countries of destination in 2009 - 2012, %

Schedule 61 Change of structure of Russian other vegetables export in cost terms by countries of destination in 2009 - 2012, %

14. RUSSIAN IMPORT OF FRESH VEGETABLES

Schedule 62 Dynamics of Russian import of fresh vegetables and potato in physical terms in 2009 - 2013*, tons

Schedule 63 Dynamics of Russian import of fresh vegetables and potato in cost terms in 2009 - 2013*, ths dollars

Schedule 64 Dynamics of Russian import of fresh vegetables by type of products and potato in physical terms by months in 2009 - January - October 2013, tons

Schedule 65 Dynamics of Russian import of fresh vegetables by type of products and potato in cost terms by months in 2009 - January - October 2013, ths dollars

Diagram 39 Structure of Russian import of fresh vegetables by type of products and potato in physical terms in 2012, %

Diagram 40 Structure of Russian import of fresh vegetables by type of products and potato in cost terms in 2012, %

Schedule 66 Change of structure of Russian import of fresh vegetables by type of products and potato in physical terms in 2009 - January - October 2013, %

Schedule 67 Change of structure of Russian import of fresh vegetables by type of products and potato in cost terms in 2009 - January - October 2013, %

Schedule 68 Dynamics of Russian tomato import in physical terms in 2009–2013*, tons

Schedule 69 Dynamics of Russian tomato import in cost terms in 2009 - 2013*, ths dollars

Diagram 41 Structure of Russian tomato import in physical terms by countries of origin in 2012, %

Diagram 42 Structure of Russian tomato import in cost terms by countries of origin in 2012, %

Schedule 70 Change of structure of Russian tomato import in physical terms by countries of origin in 2009 - 2012, %

Schedule 71 Change of structure of Russian tomato import in cost terms by countries of origin in 2009 - 2012, %

- Schedule 72 Dynamics of Russian potato import in physical terms in 2009 - 2013*, tons
- Schedule 73 Dynamics of Russian potato import in cost terms in 2009 - 2013*, ths dollars
- Diagram 43 Structure of Russian potato import in physical terms by countries of origin in 2012, %
- Diagram 44 Structure of Russian potato import in cost terms by countries of origin in 2012, %
- Schedule 74 Change of structure of Russian potato import in physical terms by countries of origin in 2009 - 2012, %
- Schedule 75 Change of structure of Russian potato import in cost terms by countries of origin in 2009 - 2012, %
- Schedule 76 Dynamics of Russian onion import in physical terms in 2009 - 2013*, tons
- Schedule 77 Dynamics of Russian onion import in cost terms in 2009 - 2013*, ths dollars
- Diagram 45 Structure of Russian onion import in physical terms by countries of origin in 2012, %
- Diagram 46 Structure of Russian onion import in cost terms by countries of origin in 2012, %
- Schedule 78 Change of structure of Russian onion import in physical terms by countries of origin in 2009 - 2012, %
- Schedule 79 Change of structure of Russian onion import in cost terms by countries of origin in 2009 - 2012, %
- Schedule 80 Dynamics of Russian other vegetables import in physical terms in 2009 - 2013*, tons
- Schedule 81 Dynamics of Russian other vegetables import in cost terms in 2009 - 2013*, ths dollars
- Diagram 47 Structure of Russian other vegetables import in physical terms by countries of origin in 2012, %
- Diagram 48 Structure of Russian other vegetables import in cost terms by countries of origin in 2012, %
- Schedule 82 Change of structure of Russian other vegetables import in physical terms by countries of origin in 2009 - 2012, %
- Schedule 83 Change of structure of Russian other vegetables import in cost terms by countries of origin in 2009 - 2012, %

15. PRODUCER PRICES FOR FRESH VEGETABLES

Schedule 84. Dynamics of producer prices for fresh cucumbers by years in 2009 - 2013, rub/ton

Schedule 85. Dynamics of producer prices for fresh tomato by years in 2009 - January - November 2013, rub/ton

Schedule 86 Dynamics of producer prices for potato in 2009 - 2013, rub/ton

Schedule 87 Dynamics of producer prices for fresh cucumbers by months in 2009 - 2013, rub/ton

Schedule 88. Dynamics of producer prices for fresh tomato by months in 2009 - 2013, rub/ton

Schedule 89 Dynamics of producer prices for potato by months in 2009 - 2013, rub/ton

Table 15 Average producer prices for fresh cucumbers by regions in 2012 - January - November 2013, rub/ton

Table 16 Average producer prices for fresh tomato by regions in 2012 - January - November 2013, rub/ton

Table 17 Average producer prices for potato by regions in 2012 - 2013, rub/ton

16. RETAIL PRICES FOR FRESH VEGETABLES

Schedule 90. Dynamics of retail prices for fresh cucumbers by years in 2009 - 2013, rub/kg

Schedule 91. Dynamics of retail prices for fresh tomato by years in 2009 - 2013, rub/kg

Schedule 92 Dynamics of retail prices for potato by years in 2009 - 2013, rub/kg

Schedule 93 Rate of growth of retail prices for fresh vegetables, potato and other products by years in 2009 - 2013, %

Schedule 94. Dynamics of retail prices for fresh cucumbers by months in 2009 - 2013, rub/kg

Schedule 95. Dynamics of retail prices for fresh tomato by months in 2009 - 2013, rub/kg

Schedule 96 Dynamics of retail prices for potato by months in 2009 - 2013, rub/kg

Table 18 Average retail prices for fresh cucumbers by regions in 2012 - 2013, rub/kg

Table 19 Average retail prices for fresh tomato by regions in 2012 - 2013, rub/kg

Table 20 Average retail prices for potato by regions in 2012 - 2013, rub/kg

17. FORECAST OF FRESH VEGETABLES MARKET DEVELOPMENT FOR 2020

Schedule 97. Dynamics of protected ground area in Russia in 2009 – 2020*, ths ha

Schedule 98 Dynamics of protected ground vegetables production in 2009 – 2020*, ths tons

Schedule 99 Gross yield of vegetables (open and protected ground) at 5% rate of growth in 2009 - 2020*, ths tons

Schedule 100 Gross yield of vegetables (open and protected ground) at 3,5% rate of growth in 2009 - 2020*, ths tons

18. PROFILES OF THE LARGEST ENTERPRISES

Table 21. Production volumes of «Agrokombinat «Moskovskiy» JSC in 2006 – 2009

Table 22. Balance sheet of «Agrokombinat «Moskovskiy» JSC in 2009 - January - December 2013, ths rubles

Table 23 Profit and loss statement of «Agrokombinat «Moskovskiy» JSC in 2009 - January - December 2013, ths rubles

Table 24. Cash flow statement of «Agrokombinat «Moskovskiy» JSC in 2009 - 2012, ths rubles

Table 25. Financials of «Agrokombinat «Moskovskiy» JSC in 2009 - 2013

Table 26. Production volumes of Agricultural complex «Yuzhniy» JSC in 2006 – 2009

Table 27. Balance sheet of «Agrokombinat «Yuzhniy» JSC in 2009 – 2012, ths rubles

Table 28. Profit and loss statement of Agricultural complex «Yuzhniy» JSC in 2009 - 2012, ths rubles

Table 29 Cash flow statement of «Agrokombinat «Yuzhniy» JSC in 2009 – 2012, ths rubles

Table 30. Financials of «Agrokombinat «Yuzhniy» JSC in 2008 – 2012

Table 31. Balance sheet of «Teplichniy kombinat «Mayskiy» LLC in 2009 – 2012, ths rubles

Table 32. Profit and loss statement of «Teplichniy kombinat «Mayskiy» LLC in 2009 - 2012, ths rubles

Table 33 Cash flow statement of «Teplichniy kombinat «Mayskiy» LLC in 2009 - 2012, ths rubles

Table 34. Financials of «Teplichniy kombinat «Mayskiy» LLC in 2008 – 2012

Table 35. Production volumes of «Alekseevskiy» State Unitary Agricultural enterprise in 2006 – 2009

Table 36. Balance sheet of «Alekseevskiy» State Unitary Agricultural enterprise in 2009 - 2012, ths rubles

Table 37. Profit and loss statement of «Alekseevskiy» State Unitary Agricultural enterprise in 2009 - 2012, ths rubles

Table 38 Cash flow statement of «Alekseevskiy» State Unitary Agricultural enterprise in 2010 - 2012, ths rubles

Table 39. Financials of «Alekseevskiy» State Unitary Agricultural enterprise in 2008 - 2012

Table 40. Subsidiaries of «Voronezhskiy Teplichniy Kombinat» PC

Table 41. Production volumes of «Agrokombinat «Teplichniy» JSC in 2006 - 2009

Table 42. Balance sheet of «Agrokombinat «Teplichniy» JSC in 2009- 2012, ths rubles

Table 43 Profit and loss statement of «Agrokombinat «Teplichniy» JSC in 2009 - 2012, ths rubles

Table 44. Cash flow statement of «Agrokombinat «Teplichniy» JSC in 2009 - 2012, ths rubles

Table 45. Financials of «Agrokombinat «Teplichniy» JSC in 2008 - 2012.

Table 46. Subsidiaries of «Voronezhskiy Teplichniy Kombinat» PC

Table 47. Production volumes of «Plemzavod»Detskoselskiy» APC in 2006 - 2009

Table 48. Balance sheet of «Plemzavod»Detskoselskiy» APC in 2009 – 2012, ths rubles

Table 49 Profit and loss statement of «Plemzavod»Detskoselskiy» APC in 2009 - 2012, ths rubles

Table 50 Cash flow statement of «Plemzavod»Detskoselskiy» APC in 2009 - 2012, ths rubles

Table 51. Financials of «Plemzavod»Detskoselskiy» APC in 2008 - 2012

ABOUT INTESCO RESEARCH GROUP

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