

TABLE OF CONTENTS

EXECUTIVE SUMMARY	6	4.5 Turnover evolution of companies producing greenhouse products (2019-2023).....	76
INTRODUCTION.....	9		
1. GENERAL INFORMATION.....	10	4.6 Ranking of companies producing greenhouse products by turnover 2023.....	79
1.1 Industry definition.....	11		
1.2 Industry general facts and figures.....	15	4.7 Financial analysis of the industry (2014-2023).....	81
1.3 Industry general characteristics.....	16		
1.4 Agricultural sector in Greece.....	20	4.8 Comparison of financial indicators for groups of companies of the sector (2023).....	88
1.5 Primary production of fruits and vegetables.....	23		
1.6 External trade of fruits and vegetables.....	25	4.9 Assets-Liabilities structure of consolidated balance sheet.....	90
2. INSTITUTIONAL FRAMEWORK.....	29		
3. DEMAND.....	44	4.10 Development of companies' financial results.....	91
3.1 Demand determinants.....	45		
3.2 Analysis of selected determinants of demand.....	47	4.11 Comparative assessment of financial indicators of major companies (2023).....	95
4. SUPPLY.....	68	4.12 Evolution of financial indicators of major companies of the industry (2019-2023).....	100
4.1 Number of producers and areas of greenhouse vegetables and fruits by region (2024).....	70	5. VALUATION OF COMPANIES OF THE INDUSTRY.....	105
4.2 Number of producers and areas of greenhouse flowers and plants by region (2024).....	71	5.1 Valuation methodology.....	106
4.3 Main companies producing greenhouse vegetables products.....	72	5.2 Valuation of companies of the industry (2019-2023).....	107
4.4 Main companies producing greenhouse flowers and plants.....	75	6. MARKET.....	108
		6.1 Cultivated areas of greenhouse vegetables and fruits.....	109

TABLE OF CONTENTS

6.2 Structure of cultivated areas of greenhouse vegetables and fruits by region		6.13 Average tomato production yield.....	122
6.3 Structure of cultivated areas of greenhouse vegetables and fruits by crop type.....	111	6.14 Size of domestic production of greenhouse cucumbers (2015-2024).....	123
6.4 Structure of cultivated areas of greenhouse tomatoes by prefecture.....	112	6.15 Average cucumbers' production yield.....	124
6.5 Number of producers of cultivated area of greenhouse vegetables and fruits.....	113	6.16 Size of domestic production of greenhouse peppers (2015-2024).....	125
6.6 Size of domestic production of greenhouse vegetables and fruits (2015-2024).....	114	6.17 Size of cultivated areas of greenhouse flowers and plants.....	126
6.7 Structure of domestic production of greenhouse vegetables and fruits, by main category.....	115	6.18 Geographical distribution of cultivated areas of greenhouse flowers and plants.....	127
6.8 Structure of domestic production of vegetables and fruits, by crop (2015-2024).....	116	6.19 Structure by crop of cultivated areas of greenhouse flowers and plants (2015-2024).....	128
6.9 Structure of domestic production of greenhouse vegetables and fruits, by prefecture (2023).....	117	6.20 Size of domestic production of greenhouse flowers and plants (2015-2024).....	129
6.10 Size of domestic production of greenhouse tomatoes (2015-2024).....	118	6.21 Porter's five forces.....	130
6.11 Structure of greenhouse tomatoes production per region.....	119	7. EUROPEAN MARKET	137
6.12 Structure of greenhouse tomatoes production per prefecture.....	120	7.1 Consumption of vegetables and fruits in EU-27	138
	121	7.2 Cultivated areas of greenhouse vegetables and fruits in EU-27.....	139
		7.3 Greenhouse tomato production in EU-27.....	140
		7.4 Fresh tomato exports in EU-27.....	142
		7.5 Production of greenhouse cucumbers in EU-27...	143

TABLE OF CONTENTS

7.6 Greenhouse pepper production in EU-27.....	144
7.7 Greenhouse strawberry production in EU-27.....	145
7.8 Average greenhouse tomato production yield in EU-27.....	146
7.9 Flowers and plants production in EU-27.....	147
8. CONCLUSIONS-PROSPECTS	149
8.1 SWOT Analysis.....	150
8.2 Main findings – Prospects.....	151
APPENDIX	
Financial indicators of companies of the industry (2014-2023).....	161
A. Capital structure and financial leverage indicators.....	162
B. Liquidity indicators.....	174
C. Activity indicators.....	180
D. Profitability indicators.....	192
Financial formulas.....	202
SOURCES & BIBLIOGRAPHY.....	203