

# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY.....</b>	<b>6</b>	4.6 Cultivated areas and producers' prices of clingstone peach and oranges(2008/09-2019/20)....	62
<b>INTRODUCTION.....</b>	<b>8</b>	4.7 Producers' and cultivated areas of clingstone peach geographical distribution (2019).....	63
<b>1. GENERAL INFORMATION.....</b>	<b>9</b>	4.8 Producers' and cultivated areas of oranges for juicing geographical distribution (2019).....	64
1.1 Industry definition.....	10	<b>5. MARKET.....</b>	65
1.2 Industry general facts and figures.....	12	5.1 Industrial production index.....	66
1.3 Industry general characteristics.....	13	5.2 Domestic production size of basic fruits and vegetables for processing (2008-2020).....	67
1.4 Agricultural sector in Greece.....	14	5.3 Domestic production size of industrial tomato (2008-2020).....	69
1.5 Primary production of fruits and vegetables.....	17	5.4 Domestic production size of clingstone peach (2008/09-2020/21).....	70
1.6 External trade of fruits and vegetables.....	19	5.5 Domestic production size of oranges for juicing (2008-2020).....	72
<b>2. INSTITUTIONAL FRAMEWORK.....</b>	<b>21</b>	5.6 Porter's five forces.....	73
<b>3. DEMAND.....</b>	<b>36</b>	<b>6. PRIMARY PRODUCTION PROCESSORS OF BASIC FRUITS AND VEGETABLES.....</b>	80
3.1 Determinants of demand.....	37	6.1 Major processing companies of industrial tomato.....	82
3.2 Analysis of selected determinants of demand...	39	6.2 Major processing companies of clingstone peach.....	83
<b>4. SUPPLY.....</b>	<b>56</b>		
4.1 Basic characteristics of industrial tomato.....	57		
4.2 Basic characteristics of clingstone peach.....	58		
4.3 Basic characteristics of oranges for juicing.....	59		
4.4 Cultivated areas and producers' prices of industrial tomato (2008-2019).....	60		
4.5 Producers' and cultivated areas of industrial tomato geographical distribution (2019).....	61		

# TABLE OF CONTENTS

---

6.3 Major processing companies of oranges for juicing.....	85	6.14 External trade of canned peach (2009-2019)..	101
6.4 Major processing companies of oranges for juicing, with different main activity.....	86	6.15 External trade of orange juices (2009-2019)...	104
6.5 Turnover growth of major industrial tomato processing companies(2014-2018).....	87	6.16 Financial analysis of the processing industry (2009-2018).....	106
6.6 Turnover growth of major industrial tomato processing companies, with different main activity(2014-2018).....	88	6.17 Groups of processing companies financial indicators comparison (2018).....	118
6.7 Turnover growth of major clingstone peach processing companies(2014-2018).....	89	6.18 Consolidated balance sheet Assets-Liabilities structure of major processing companies.....	120
6.8 Turnover growth of major orange processing companies(2014-2018).....	92	6.19 Processing companies financial results growth.....	123
6.9 Turnover growth of major orange processing companies, with different main activity(2014-2018).....	93	6.20 Comparative assessment of major processing companies' financial indicators (2018).....	135
6.10 Ranking of major industrial tomato processing companies on turnover 2018.....	95	<b>7. VALUATION OF PRIMARY PRODUCTION PROCESSORS OF BASIC FRUITS AND VEGETABLES..</b>	147
6.11 Ranking of major clingstone peach processing companies on turnover 2018.....	96	7.1 Valuation methodology.....	148
6.12 Ranking of major orange processing companies on turnover 2018.....	98	7.2 Valuation of primary production processors of basic fruits and vegetables (2018).....	149
6.13 External trade of processed tomato products (2009-2019).....	99	<b>8. INTERNATIONAL MARKET ..</b>	150
		8.1 International production of industrial tomato...	151
		8.2 Industrial tomato balance in EU.....	154
		8.3 International market's figures of clingstone peach.....	155
		8.4 Peach processing balance in EU.....	162

# TABLE OF CONTENTS

---

8.5 International quantity of juiced oranges.....	163
8.6 Juiced oranges balance in EU.....	165
8.7 International market's figures of orange juices.	166
<b>9. CONCLUSIONS-PROSPECTS.....</b>	<b>170</b>
9.1 SWOT Analysis.....	171
9.2 Main findings – Prospects.....	172
<b>APPENDIX</b>	
Financial indicators of processing companies 2009-2018 (industrial tomato, juiced oranges, clingstone peach,).....	176
A. Capital structure and financial leverage indicators.....	177
B. Liquidity indicators.....	201
C. Activity indicators.....	213
D. Performance indicators.....	237
Financial formulas.....	257
<b>SOURCES &amp; BIBLIOGRAPHY.....</b>	<b>258</b>