

# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY</b> .....	6	4.6 Cultivated areas and producers' prices of clingstone peach and oranges(2008/09-2020/21)...	71
<b>INTRODUCTION</b> .....	8	4.7 Geographical allocation of producers' and cultivated areas of clingstone peach (2020).....	72
<b>1. GENERAL INFORMATION</b> .....	9	4.8 Geographical allocation of producers' and cultivated areas of oranges for juicing (2020).....	73
1.1 Industry definition.....	10	<b>5. MARKET</b> .....	74
1.2 Industry general facts and figures.....	12	5.1 Industrial production index.....	75
1.3 Industry general characteristics.....	13	5.2 Domestic production size of basic fruits and vegetables for processing (2008-2021).....	76
1.4 Agricultural sector in Greece and in EU-27.....	14	5.3 Domestic production size of industrial tomato (2008-2021).....	78
1.5 Primary production of fruits and vegetables.....	18	5.4 Domestic production size of clingstone peach (2008/09-2021/22).....	80
1.6 External trade of fruits and vegetables.....	20	5.5 Domestic production size of oranges for juicing (2008-2021).....	83
<b>2. INSTITUTIONAL FRAMEWORK</b> .....	22	5.6 Porter's five forces.....	85
<b>3. DEMAND</b> .....	40	<b>6. PRIMARY PRODUCTION PROCESSORS OF BASIC FRUITS AND VEGETABLES</b> .....	92
3.1 Determinants of demand.....	41	6.1 Major processing companies of industrial tomato.....	94
3.2 Analysis of selected determinants of demand...	43	6.2 Major processing companies of clingstone peach.....	96
<b>4. SUPPLY</b> .....	65		
4.1 Basic data of industrial tomato.....	66		
4.2 Basic data of clingstone peach.....	67		
4.3 Basic data of oranges for juicing.....	68		
4.4 Cultivated areas and producers' prices of industrial tomato (2008-2020).....	69		
4.5 Geographical allocation of producers' and cultivated areas of industrial tomato (2020).....	70		

# TABLE OF CONTENTS

6.3 Major processing companies of oranges for juicing.....	98	6.15 Groups of processing companies financial indicators comparison (2019).....	129
6.4 Turnover growth of major industrial tomato processing companies(2015-2019).....	99	6.16 Consolidated balance sheet Assets-Liabilities structure of major processing companies.....	131
6.5 Turnover growth of major industrial tomato processing companies, with different main activity(2015-2019).....	100	6.17 Processing companies financial results growth.....	134
6.6 Turnover growth of major clingstone peach processing companies(2015-2019).....	101	6.18 Comparative assessment of major processing companies' financial indicators (2019).....	146
6.7 Turnover growth of major orange processing companies(2015-2019).....	104	<b>7. VALUATION OF PRIMARY PRODUCTION PROCESSORS OF BASIC FRUITS AND VEGETABLES..</b>	158
6.8 Ranking of major industrial tomato processing companies based on turnover 2019.....	106	7.1 Valuation methodology.....	159
6.9 Ranking of major clingstone peach processing companies based on turnover 2019.....	107	7.2 Valuation of primary production processors of basic fruits and vegetables (2019).....	160
6.10 Ranking of major orange processing companies based on turnover 2019.....	109	<b>8. INTERNATIONAL MARKET.....</b>	161
6.11 External trade of processed tomato products (2009-2020).....	110	8.1 World production of industrial tomato.....	162
6.12 External trade of canned peach (2009-2020)..	112	8.2 External balance of industrial tomato in EU	165
6.13 External trade of orange juices (2009-2020)...	115	8.3 Global market data of clingstone peach.....	166
6.14 Financial analysis of the processing industry (2010-2019).....	117	8.4 External balance of peach processing in EU.....	173
		8.5 Production of canned fruit in EU.....	174
		8.6 Global quantity of juiced oranges.....	175
		8.7 External balance of juiced oranges in the EU.....	177
		8.8 International market's figures of orange juices.	178

# TABLE OF CONTENTS

---

<b>9. CONCLUSIONS-PROSPECTS</b> .....	182
9.1 SWOT Analysis.....	183
9.2 Main findings – Prospects.....	184
<b>APPENDIX</b>	
Financial indicators of processing companies 2010-2019 (industrial tomato, juiced oranges, clingstone peach,).....	191
A. Capital structure and financial leverage indicators.....	192
B. Liquidity indicators.....	216
C. Activity indicators.....	228
D. Performance indicators.....	252
Financial formulas.....	272
<b>SOURCES &amp; BIBLIOGRAPHY</b> .....	273