



# **THE AGRICULTURE AND FOOD INDUSTRY IN RUSSIA:**

## **2016 FACTS AND FIGURES**



4

RUSSIA IN THE GLOBAL AGRICULTURE  
AND FOOD INDUSTRY

18

CEREALS AND PULSES IN RUSSIA:  
CURRENT ISSUES AND TRENDS

26

GREENHOUSE VEGETABLES IN RUSSIA:  
CURRENT ISSUES AND TRENDS

32

MEAT AND POULTRY INDUSTRY IN RUSSIA:  
CURRENT ISSUES AND TRENDS

42

AGRICULTURE AND FOOD INDUSTRY IN  
RUSSIA: LARGEST PRIVATE COMPANIES



## RUSSIA IN THE GLOBAL AGRICULTURE AND FOOD INDUSTRY

## RUSSIA IS AMONG TOP-5 MAJOR GLOBAL GRAINS PRODUCERS

### Top-5 largest global grains producers

2016/2017, mln tonnes



501.1    472.6    239.2    114.8    **114.0**

1. China    2. USA    3. India    4. Brazil    **5. Russia**

Source: Foreign Agricultural Service, USDA

## RUSSIA IS THE SIXTH LARGEST GLOBAL COARSE GRAIN PRODUCER

### Top 6 global coarse grain producers

2016/2017, mln tonnes



402.6    227.4    99.8    48.7    44.2    **40.8**

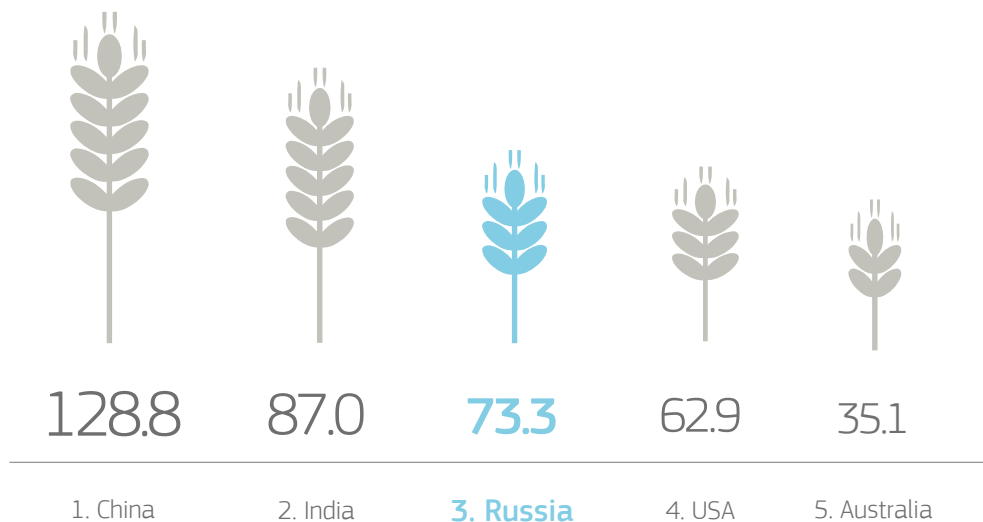
1. USA    2. China    3. Brazil    4. Argentina    5. India    **6. Russia**

Source: Foreign Agricultural Service, USDA

## RUSSIA IS THE THIRD LARGEST GLOBAL WHEAT PRODUCER

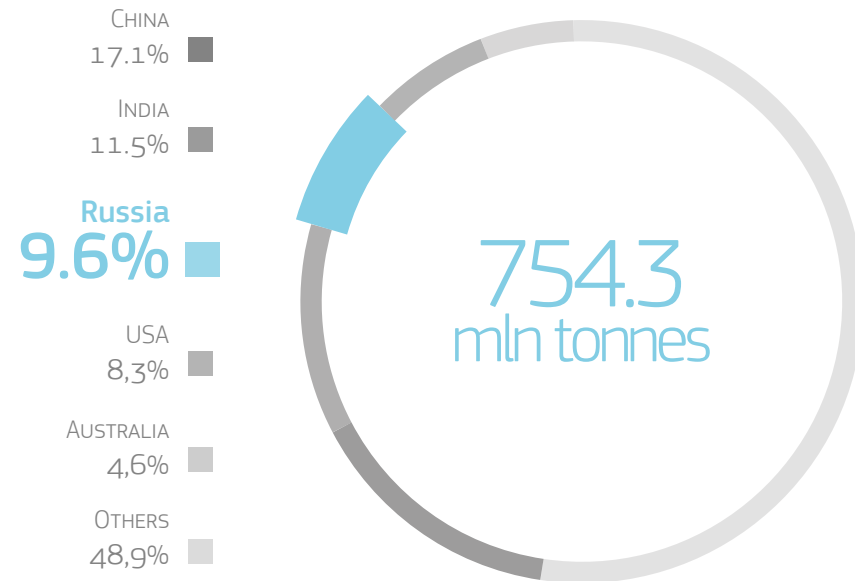
### Top-5 largest global wheat producers

2016/2017, mln tonnes



Source: Foreign Agricultural Service, USDA

## RUSSIA ACCOUNTS FOR OVER 9% OF GLOBAL WHEAT PRODUCTION IN 2016



Source: Foreign Agricultural Service, USDA

## RUSSIA IS THE SECOND LARGEST GLOBAL SUNFLOWER SEED PRODUCER

Top-5 largest global sunflower seed producers  
2016/2017, mln tonnes



14.2    **10.9**    8.3    3.3    2.8

1. Ukraine    **2. Russia**    3. EU    4. Argentina    5. China

Source: Foreign Agricultural Service, USDA

## RUSSIA IS THE FIFTH LARGEST GLOBAL COW'S MILK PRODUCER

Top-5 largest global cow's milk producers  
2016, mln tonnes



96.3    68.8    36.0    32.7    **30.7**

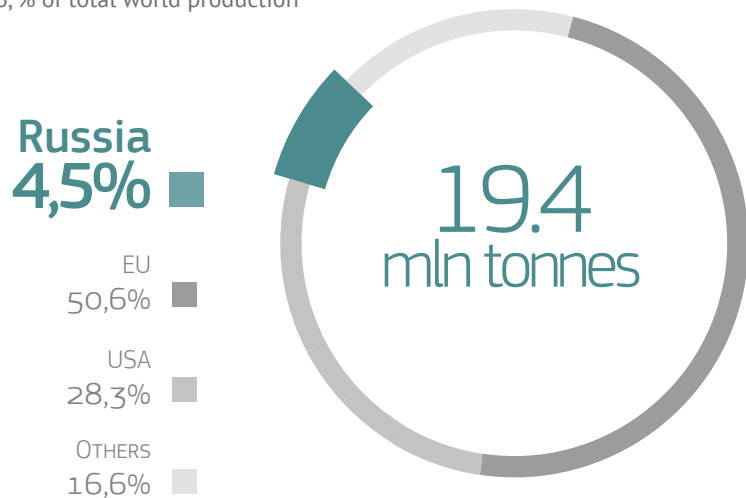
1. USA    2. India    3. China    4. Germany    **5. Russia**

Source: Foreign Agricultural Service, USDA, Eurostat

## RUSSIA IS AMONG TOP-3 MAJOR GLOBAL CHEESE PRODUCERS

### Top-3 largest global cheese producers

2016, % of total world production

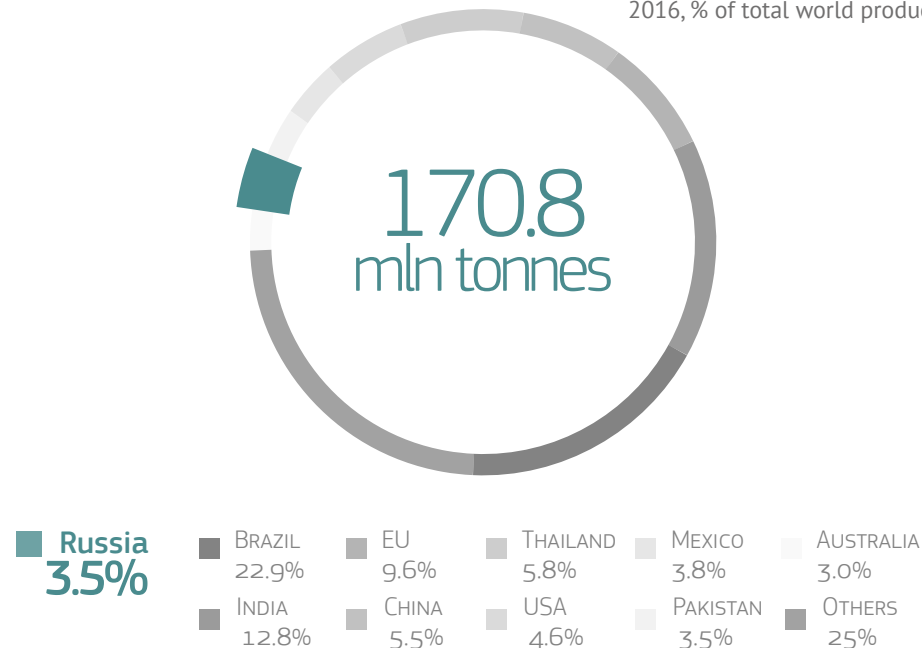


Source: Foreign Agricultural Service, USDA

## RUSSIA IS AMONG TOP-10 MAJOR GLOBAL CENTRIFUGAL SUGAR PRODUCERS

### Top-10 largest global centrifugal sugar producers

2016, % of total world production



Source: Foreign Agricultural Service, USDA

## RUSSIA HAS THE EIGHTH LARGEST CATTLE HERD GLOBALLY

### Largest cattle herds globally

2016, total beginning stocks,  
mln heads

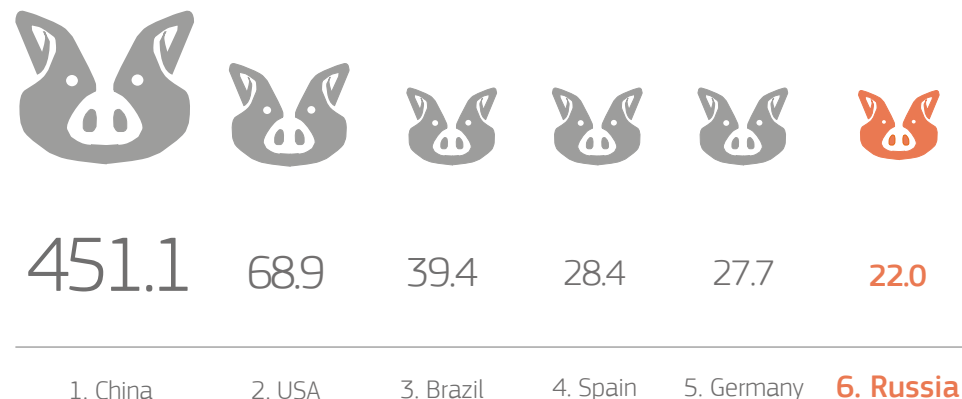


Source: Foreign Agricultural Service, USDA, FranceAgriMer, Eurostat

## RUSSIA HAS THE SIXTH LARGEST SWINE STOCK GLOBALLY

### Largest swine stocks globally

2016, total beginning stocks,  
mln heads



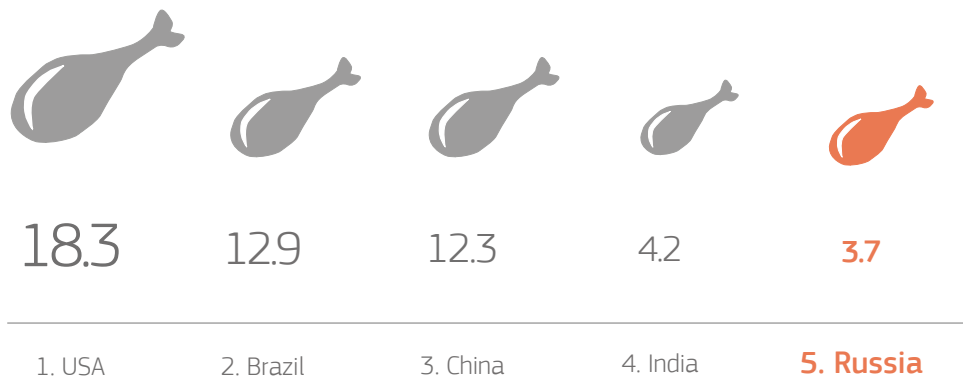
Source: Foreign Agricultural Service, USDA, FranceAgriMer, Eurostat



## RUSSIA IS THE FIFTH LARGEST GLOBAL BROILER MEAT PRODUCER

### Top-5 largest global broiler meat producers

2016, mln tonnes (Carcass Weight Equivalent)

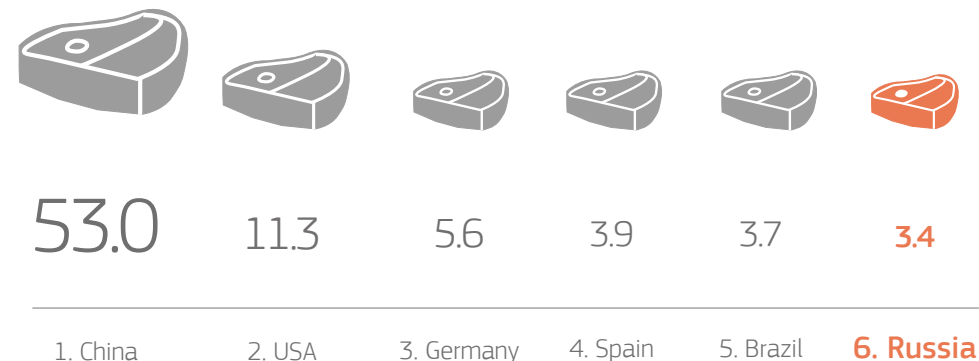


Source: Foreign Agricultural Service, USDA, FranceAgriMer, Eurostat

## RUSSIA IS THE SIXTH LARGEST GLOBAL SWINE PRODUCER

### Top-5 largest global swine producers

2016, mln tonnes (Carcass Weight Equivalent)



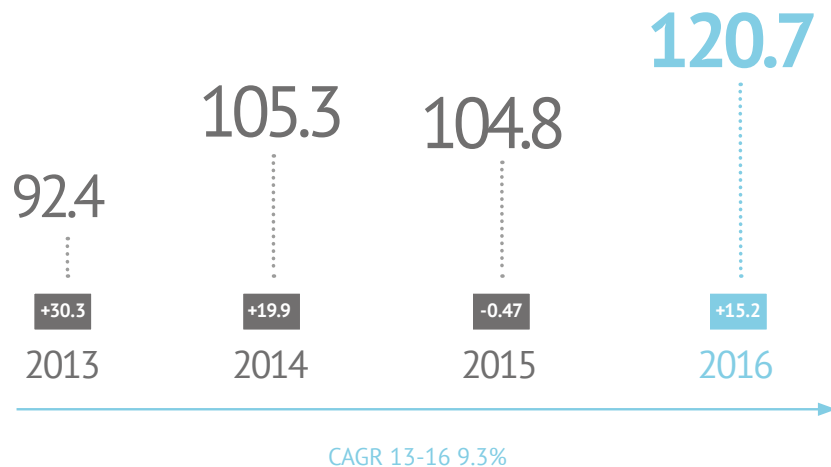
Source: Foreign Agricultural Service, USDA, FranceAgriMer, Eurostat, Russian Federal State Statistics Service



## CEREALS AND PULSES IN RUSSIA: CURRENT ISSUES AND TRENDS

## RUSSIA'S CEREALS AND PULSES HARVEST SET A RECORD IN 2016

Russian cereals and pulses production  
mln tonnes



xx % change year-on-year

Source: Russian Federal State Statistics Service

## ALMOST 40% OF CEREALS AND PULSES IS PRODUCED BY TOP 5 REGIONS

Top 5 cereals and pulses producers  
mln tonnes

Rank 2016 (2015)	Region	2016	2015	2015 vs 2016, %
1 (1)	Krasnodar Region	13.9	13.7	+1.4
2 (2)	Rostov Region	11.6	9.5	+22.1
3 (3)	Stavropol Region	10.2	8.9	+14.6
4 (5)	Altai Region	4.8	3.9	+23.1
5 (4)	Voronezh Region	4.8	4.2	+14.3
<b>Total, Russia</b>		<b>120.7</b>	<b>104.8</b>	

Source: Russian Federal State Statistics Service

## TOP 5 COMPANIES ACCOUNT FOR OVER 30% OF TOTAL GRAIN EXPORT VOLUME

### Top-5 grain exporters

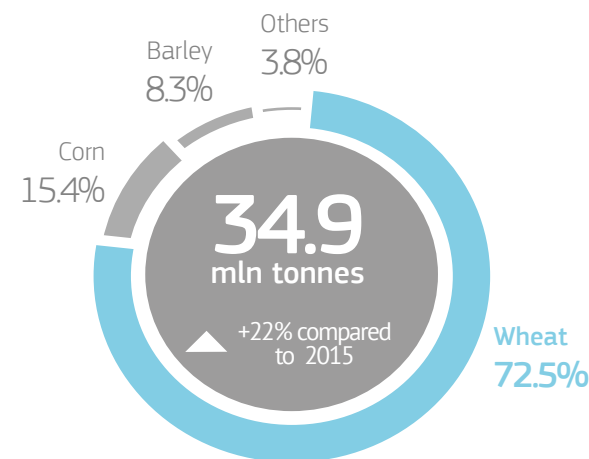
mln tonnes

Rank 2016 (2015)		2016	2015	2015 vs 2016, %
1 (1)	TD RIF	4.1	4.4	-6.8
2 (2)	MZK	3.1	3.0	+3.3
3 (3)	Cargill	2.7	1.9	+42.1
4 (5)	Aston	2.1	1.4	+50.0
5 (8)	Louis Dreyfus	1.7	1.2	+41.7
<b>Total, Russia</b>		<b>34.9</b>	<b>31.2</b>	

## WHEAT ACCOUNTS FOR OVER 70% IN THE RUSSIAN GRAIN EXPORT STRUCTURE

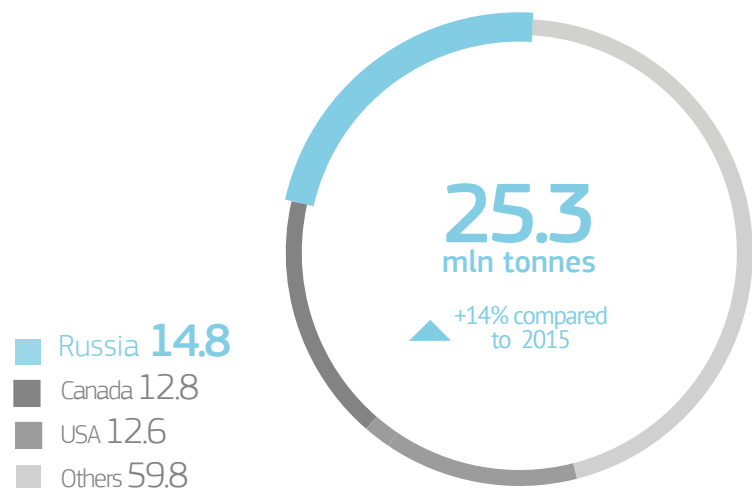
### Cereals and pulses export structure

2016, %



## RUSSIA IS THE LARGEST EXPORTER OF WHEAT IN THE WORLD IN 2016

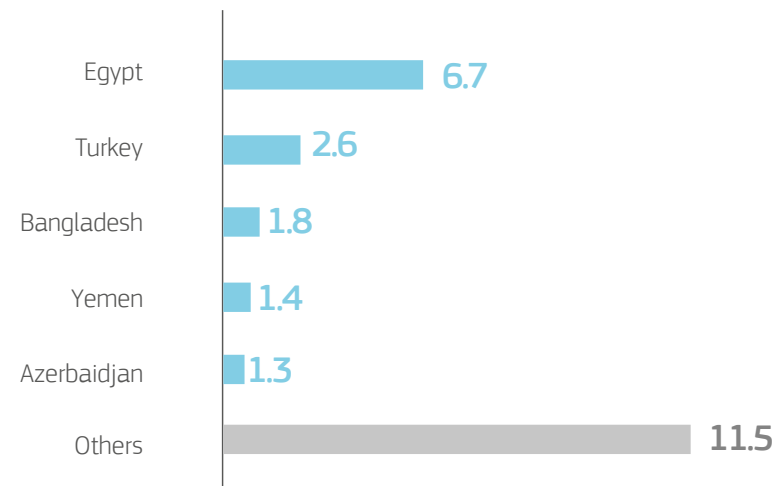
Top-3 largest wheat exporting countries  
2016, %



Source: Foreign Agricultural Service, USDA, FranceAgriMer, Eurostat

## TOP 5 RUSSIAN WHEAT IMPORTERS ACCOUNT FOR OVER 50% OF TOTAL EXPORT VOLUME

Top-5 wheat importing countries  
2016, mln tonnes



Source: Russian Federal State Statistics Service, Federal Customs Service

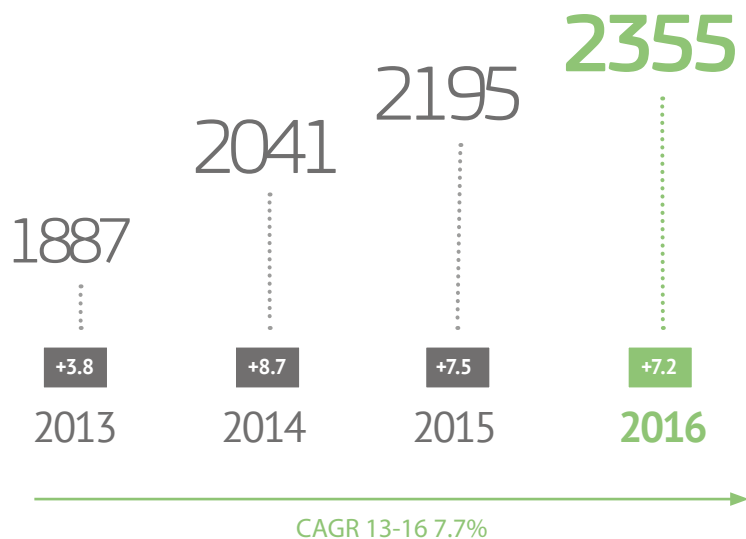


## GREENHOUSE VEGETABLES IN RUSSIA: CURRENT ISSUES AND TRENDS

## GREENHOUSE AREA IN RUSSIA IS GROWING STEADILY...

Greenhouse area in Russia\*

Ha



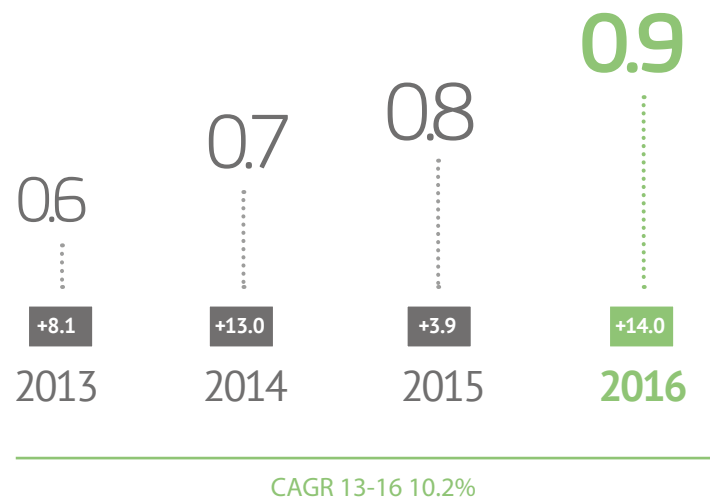
xx % change year-on-year

Source: National Horticultural Union  
\* in agriculture companies

## ...AS WELL AS THE GREENHOUSE VEGETABLES PRODUCTION VOLUME

Russian greenhouse vegetables production\*

mln tonnes



xx % change year-on-year

Source: Russian Federal State Statistics Service  
\* in agriculture companies

## IN 2016 TOP 5 REGIONS PRODUCED ONE THIRD OF TOTAL GREENHOUSE VEGETABLES VOLUME...

**Top-5 greenhouse vegetables producing regions\***  
mln tonnes

Rank 2016 (2015)		2016	2015	2015 vs 2016, %
1 (2)	Krasnodar Region	0.09	0.07	+33.9
2 (1)	Republic of Bashkortostan	0.07	0.07	+0.5
3 (4)	Karachayevo-Circassian Republic	0.05	0.04	+22.2
4 (8)	Stavropol Region	0.04	0.03	+42.9
5 (3)	Republic of Tatarstan	0.04	0.03	+11.4
<b>Total, Russia</b>		<b>0.9</b>	<b>0.8</b>	

Source: Russian Federal State Statistics Service  
\* in agriculture companies

## ...AND TOP 5 COMPANIES ACQUIRED FOR OVER 15% OF TOTAL GREENHOUSE VEGETABLES VOLUME PRODUCED IN 2016

**Top-5 greenhouse vegetables producing companies**  
mln tonnes

Rank 2016 (2015)		2016	2015	S, Ha 2016
1 (1)	Yuzhniy <i>Karachayevo-Circassian Republic</i>	0.05	0.04	144
2 (2)	Eco-Kultura <i>Stavropol., Leningrad, Lipetsk Regions</i>	0.04	0.03	79.1
3 (4)	Zelenaya Liniya <i>Krasnodar Region</i>	0.03	0.02	83
4 (3)	Moskovskiy <i>Moscow Region</i>	0.02	0.03	75
5 (5)	Vyborjetz <i>Leningrad Region</i>	0.02	0.02	26
<b>Total, Russia</b>		<b>0.9</b>	<b>0.8</b>	

Source: Spark, company data, open sources



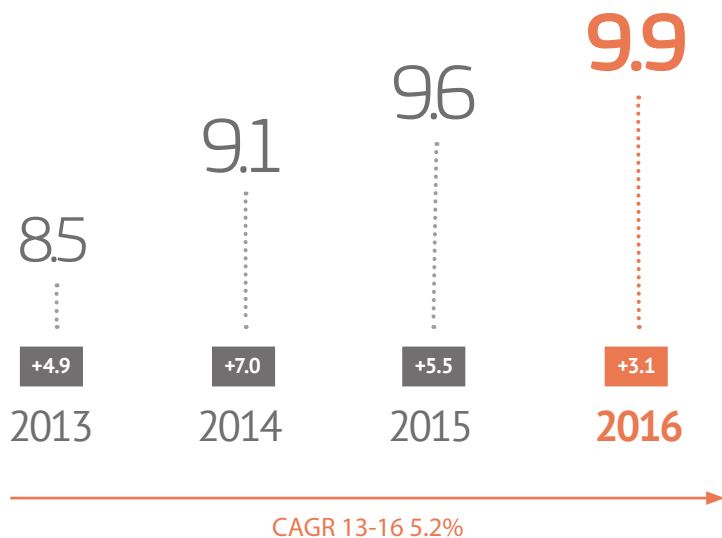


IV

## MEAT AND POULTRY INDUSTRY IN RUSSIA: CURRENT ISSUES AND TRENDS

## MEAT AND POULTRY PRODUCTION: OVER 10 YEARS OF GROWTH

Livestock and poultry for slaughter  
slaughter weight, mln tonnes

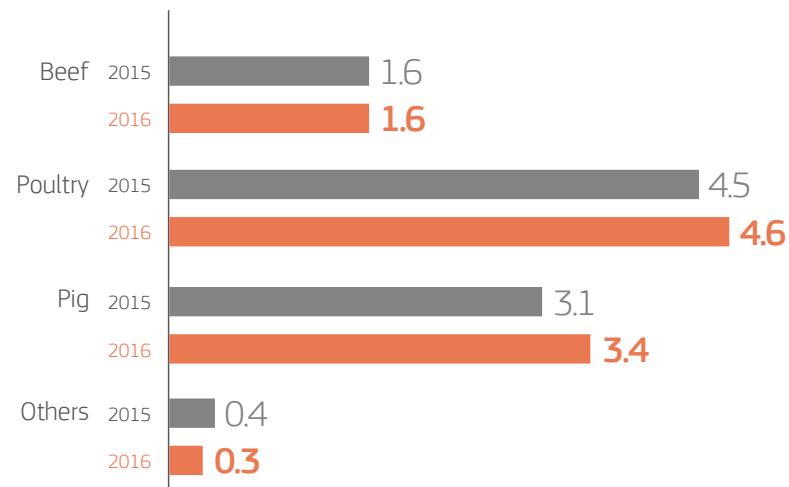


xx % change year-on-year

Source: Russian Federal State Statistics Service

## GROWTH IN 2016 WAS ENSURED BY PIG AND POULTRY, WHILE BEEF PRODUCTION SLIGHTLY REDUCED

Livestock and poultry production structure  
mln tonnes



Source: Russian Federal State Statistics Service

## TOP 5 REGIONS ACCOUNT FOR OVER 20% OF LIVESTOCK AND POULTRY PRODUCTS VOLUME IN ACTUAL PRICES

### Livestock and poultry products

bln RuR, in actual prices

Rank 2016 (2015)		2016	2015	2015 vs 2016, %
1 (1)	Belgorod Region	146.7	150.7	-2.7
2 (2)	Republic of Tatarstan	112.8	107.8	+4.6
3 (3)	Krasnodar Region	99.4	90.0	+10.4
4 (4)	Republic of Bashkortostan	91.7	86.3	+6.1
5 (5)	Rostov Region	80.6	74.9	+7.6
<b>Total, Russia</b>		<b>2470</b>	<b>2374</b>	

Source: Russian Federal State Statistics Service

## BELGOROD REGION REMAINS THE CHAMPION IN TERMS OF LIVESTOCK AND POULTRY PRODUCTION

### Livestock and poultry production

slaughter weight, mln tonnes

Rank 2016 (2015)		2016	2015	2015 vs 2016, %
1 (1)	Belgorod Region	1.3	1.3	+1.0
2 (2)	Chelyabinsk Region	0.4	0.4	+4.9
3 (3)	Krasnodar Region	0.4	0.4	+0.7
4 (4)	Kursk Region	0.4	0.3	+7.3
5 (5)	Stavropol Region	0.3	0.3	+11.2
<b>Total, Russia</b>		<b>9.9</b>	<b>9.6</b>	

Source: Russian Federal State Statistics Service

## REGIONS WITH THE LARGEST CATTLE HERD AND TOP BEEF PRODUCING REGIONS ARE LIKELY TO COINCIDE

### Cattle herd vs beef production

by top beef producing regions

	Beef production, slaughter weight, mln tonnes		Cattle herd, mln heads	
	2016	Rank	2016	Rank
Republic of Bashkortostan	<b>0.1</b>	1	1.0	1
Republic of Tatarstan	<b>0.09</b>	2	1.0	2
Altai Region	<b>0.07</b>	3	0.8	4
Krasnodar Region	<b>0.07</b>	4	0.5	7
Republic of Dagestan	<b>0.06</b>	5	1.0	3
<b>Total, Russia</b>	<b>1.6</b>		<b>18.9</b>	

Source: Russian Federal State Statistics Service

## THE SAME WORKS FOR THE PIG MEAT PRODUCTION

### Swine stock vs swine production

by top swine producing regions

	Swine production, slaughter weight, mln tonnes		Swine stock, mln heads	
	2016	Rank	2016	Rank
Belgorod Region	<b>0.6</b>	1	4.1	1
Kursk Region	<b>0.2</b>	2	1.5	2
Tambov Region	<b>0.2</b>	3	1.0	3
Pskov Region	<b>0.1</b>	4	0.8	4
Voronezh Region	<b>0.1</b>	5	0.7	6
<b>Total, Russia</b>	<b>3.4</b>		<b>22.0</b>	

Source: Russian Federal State Statistics Service

## TOP 5 COMPANIES ACCOUNT FOR 20% OF THE TOTAL MEAT VOLUME PRODUCED IN 2016

**Top 5 meat producing companies**  
slaughter weight, mln tonnes

Rank 2016 (2015)		2016	2015	2015 vs 2016, %
1 (1)	Cherkizovo	0.6	0.6	+7.0
2 (2)	Priorskolye	0.5	0.5	-3.2
3 (3)	Miratorg	0.4	0.4	+11.0
4 (4)	Belgrankorm	0.3	0.3	-1.2
5 (5)	Resurs	0.3	0.3	+3.9
<b>Total, Russia</b>		<b>9.9</b>	<b>9.6</b>	

Source: company data, open sources

## TOP 5 COMPANIES, ENGAGED IN MEAT PRODUCTION, ACCOUNT FOR 15% OF THE RUSSIAN AGRICULTURE INDUSTRY REVENUE

**Top 5 meat producing companies**  
Revenue, bln USD

Rank 2016 (2015)		2016*	2015**	2015 vs 2016, %
1 (1)	Miratorg	2.0	1.4	+25.0
2 (2)	Cherkizovo	1.4	1.1	+6.5
3 (3)	Rusagro	1.4	1.0	+16.7
4 (4)	Agro-Belogorye	0.9	0.9	-14.9
5 (5)	Agrokompleks im. N.I. Tkacheva	0.8	0.6	+15.8
<b>Total, Russia</b>		<b>42.8</b>	<b>34.0</b>	

Source: Russian Federal State Statistics Service, company data, Forbes, open sources

\* 1 USD = 58.8 RuR

\*\* 1 USD = 69.0 RuR



## AGRICULTURE AND FOOD INDUSTRY IN RUSSIA: LARGEST PRIVATE COMPANIES

# THE AGRICULTURE AND FOOD INDUSTRY IN RUSSIA: LARGEST PRIVATE COMPANIES

## Top-6 Russian agriculture companies

Revenue, bln USD

	<b>1. Sodruzhestvo</b> (oilseed processing, animal feed, logistics, food distribution)	<b>2. Miratorg</b> (meat production and processing, animal feed, logistics, food distribution)	<b>3. Efko</b> (oilseed processing, mayonnaise, margarine, milk and milk products, ketchup)	<b>4. Cherkizovo</b> (poultry and swine production and processing, animal feed)	<b>5. Rusagro</b> (sugar, meat, margarine, mayonnaise, cereals production)	<b>6. Agro-Belogye</b> (swine production and processing, animal feed)
2015*	1.6	1.4	1.2	1.1	1.0	0.9
2016**	<b>2.5</b>	<b>2.0</b>	<b>1.8</b>	<b>1.4</b>	<b>1.4</b>	<b>0.9</b>
2016 vs 2015, %	<b>+19.7</b>	<b>+25.0</b>	<b>+31.2</b>	<b>+6.5</b>	<b>+16.7</b>	<b>-14.9</b>

Source: Forbes

\* 1 USD = 69.0 RuR

\*\* 1 USD = 58.8 RuR



**RUSSIAN DIRECT**  
INVESTMENT FUND

Presnenskaya Nab., 8/1  
Moscow, Russia, 123317  
Tel.: +7 (495) 644-34-14  
Fax: +7 (495) 644-34-13  
IR@rdif.ru  
www.rdif.ru  
www.investinrussia.com

