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Report Highlights:

Steady demand for chicken meat and ample feed supplies are expected to lift production to 4.725 MMT (RTC) in 2021. Exports in 2021 are projected at 220,000 MT (RTC) with shipments to traditional and recently opened markets expected to grow at a slower rate than the 22 percent growth in 2020 driven by entry into the Chinese market. A weaker ruble will spur export initiatives but harm margins from domestic sales. In this environment, leading poultry companies are expected to increase their market shares at the expense of smaller players.

Executive summary

Steady demand for chicken meat, availability of feed from an ample grain crop in Russia and growing imports of soybean meal support production growth to 4.725 MMT (RTC) in 2021. A weaker ruble will drive export initiatives but will harm margins from domestic sales due to increased costs of imported breeding flock, feed additives, veterinary medicine, and equipment maintenance. Leading companies with complex value-added chains, multiregional presence and access to credit are more resilient to lower margins. Industry leaders will further increase their market shares at the expense of smaller and less efficient players. The forecast for 2020 production is raised to 4.715 MMT (RTC). One percent growth year-over-year reflects better-then-expected exports, namely to China, and low immediate impact on broiler industry operations from the pandemic-related recession. As of the date of the report, no Covid-related closures of chicken farms and processing plants have been reported.

2021 exports are forecast at 220,000 MT (RTC), the growth of shipments to traditional and recently opened markets continue at a smaller pace compared to 22 percent year-over-year growth of exports in 2020, when Russian exporters successfully entered the market capturing the benefit of rising Chinese imports.

Domestic consumption is forecast flat at 4.715 MMT (RTC). The segment of population in difficult economic conditions continues to grow in Russia due to Covid-related deterioration of disposable incomes. The current economic environment limits opportunities for growth of chicken meat sales. Moreover, competition with pork will intensify, pork prices are falling due to rising domestic supply from the modernized pork industry.

In response to Ruble depreciation and a spike in wheat exports in the first quarter of 2020, the Government of Russia (GOR) introduced a series of measures to contain domestic prices of wheat and forage grains. The GOR limited exports of locally harvested grains and oilseeds, simplified imports of soybean meals and activated State Grain Reserves. GOR will likely pursue protectionist policies in 2021, and forage grains prices will remain attractive in the market.

Considering the stagnating domestic demand, chicken meat producers are striving to maintain their gains in China and expand in other export markets. These goals are threatened by risks related to ongoing spread of Highly Pathogenic Avian Influenza (HPAI) on the European continent and in Asia. The epizootic environment was favorable in Russia until August 2020, when HPAI outbreaks were reported in Chelyabinsk and Omsk regions. In the case of further spread of the disease, the moderately optimistic production and export forecasts shall be revised.

Key Macroeconomic indicators are forecast to decline in 2020 due to Covid-related disruptions: GDP - 4.5/ - 5.5 percent; Real Disposable Incomes - 3.8 percent. Real Disposable Incomes have fallen a record 8 percent in the second quarter. The Ruble depreciated 15.5 percent against the U.S. dollar in year-to-date terms as of August, 15, 2020.

NOTE: USDA unofficial data excludes Crimean production and exports. However, in 2014 the Russian Federal State Statistics Service (Rosstat) began incorporating Crimean production and trade data into their official estimates. Where possible, data reported by FAS/Moscow is exclusive of information attributable to Crimea.

Table 1. Russia: Chicken Meat Production, Supply and Demand, 1,000 MT (RTC), million head

Poultry, Meat, Chicken	**2019**		**2020**		**2021**	
Market Begin Year	**Jan 2019**		**Jan 2020**		**Jan 2021**	
Russia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Inventory (Reference)	535	520		523		523
Beginning Stocks	13	13	20	20	0	25
Production	4,671	4,668	4,685	4,715	0	4,725
Total Imports	224	224	225	220	0	210
Total Supply	4,908	4,905	4,930	4,955	0	4,960
Total Exports	164	172	170	215	0	220
Human Consumption	4,724	4,713	4,740	4,715	0	4,715
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	4,724	4,713	4,740	4,715	0	4,715
Total Use	4,888	4,885	4,910	4,930	0	4,935
Ending Stocks	20	20	20	25	0	25
Total Distribution	4,908	4,905	4,930	4,955	0	4,960
(MIL HEAD), (1,000 MT RTC)						

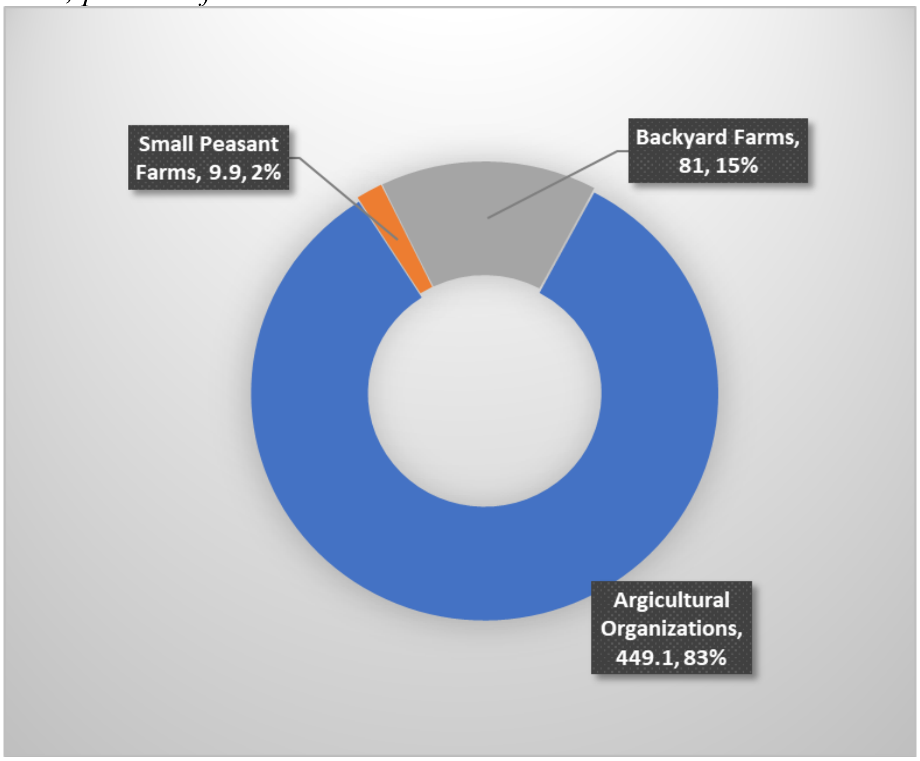
NOTE: Not Official USDA data; Official USDA data is available at http://apps.fas.usda.gov/psdonline/

Overview of Russia's Poultry Industry

Poultry Inventories

As of January 1, 2020, total poultry inventories in Russia were 544.691 million head. Eighty-three percent of all fowl are raised on commercial farms, 15 percent are "backyard production" and 2 percent are on small subsistence ("peasant") farms. Broilers and layers account for approximately 96 percent of total poultry inventories.

Chart 1. Russia: Distribution of poultry inventories by types of farms on January 1, 2020 in million head; percent of total herd.

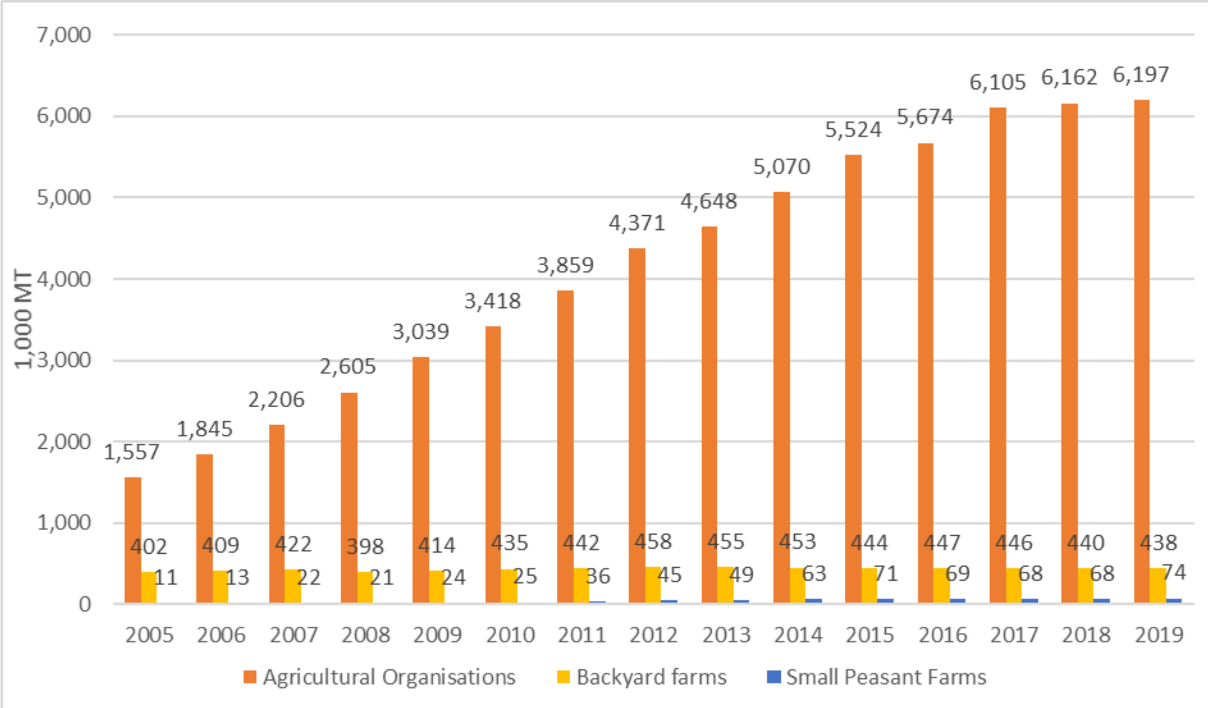


Source:Rosstat

Poultry meat production by industrialized farms.

Industrialized commercial farms (or agricultural organizations in Rosstat's terminology) account for 93.4 percent of total production of poultry meat. Industrial production of poultry meat grew from 2.557 MMT (live weight) in 2005 to 6.197 MMT (live weight) in 2019. The average annual growth rate was 12 percent between 2005 and 2017, when industry reached the capacity to fully satisfy domestic demand. Subsequently, production growth slowed down to 0.94 percent in 2018 and 0.56 percent in 2019. Turkey meat production accounted for the marginal growth of the sector in 2018 and 2019. There were signs of market oversaturation with chicken meat in 2018-2019. Farm-gate prices for broilers were falling, chicken meat production and consumption declined year-on-year in 2019, several large and many small plants closed operations due to bankruptcies. According to Rosstat, total poultry meat production grew 0.8 percent year-over-year in the first half of 2020 to 3.221 MMT (live weight, excluding Crimea). Rosstat's final production estimate for poultry meat in 2019 is 6.609 MMT (live weight, excluding Crimea). Production estimates in this report have been adjusted in accordance with final Rosstat data.

Chart 2. Russia: Production of poultry meat by types of farms in 2005-2019, 1,000 MT (live weight)



Source: www.fedstat.ru

Chicken Meat Production

2020 and 2021 Production forecasts

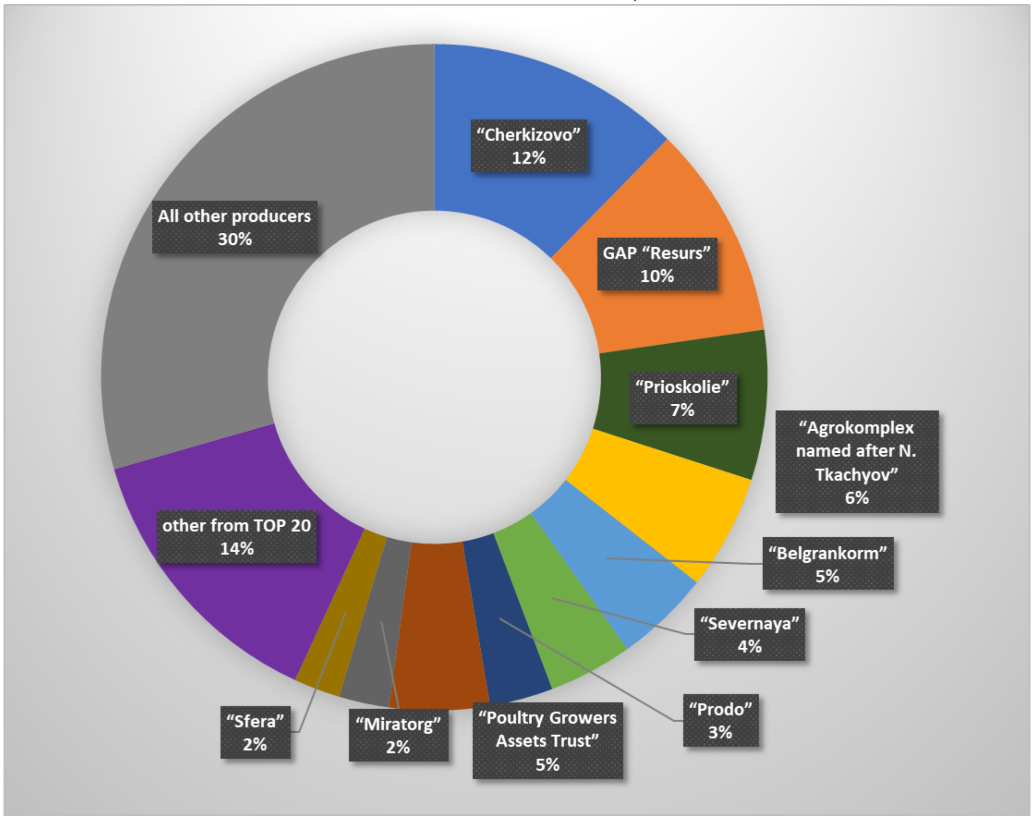
Steady demand for chicken meat during the Covid-triggered recession, availability of feeds from the strong grain crop in Russia and growing imports of soybean meal will support marginal production growth to 4.725 MMT (RTC) in 2021.

The 2020 production forecast is revised to 4.715 MMT (RTC); one percent growth year-over year. Domestic consumption of chicken meat is stable despite increased competition with pork. Quarantine measures and travel restrictions for Russian citizens due to COVID-19 supported stable demand for chicken meat in retail, especially for the less expensive whole chickens. In addition, demand from China, a newly opened export market, created room in the saturated market and stimulated additional output.

The share of chicken in total poultry meat is approximately 94 percent (turkey 5.8 percent, other poultry (ducks, geese, quail) is 0.2 percent). Twenty companies[1] produced 4.383 million MT (live weight) of chicken in 2019 and accounted for 70.5 percent of total chicken meat production. The market share of the top twenty is growing in 2020 and will continue growing in 2021. Four out of five leading companies successfully started exporting to China and have strengthened their positions in the top of the broiler producers' rankings.

[1] Please refer to Table 2. Top-20 Russia's Broiler Meat Producing Companies in 2018-19 for details.

Chart 3. Russia: Broiler Meat Producers in 2019, market shares



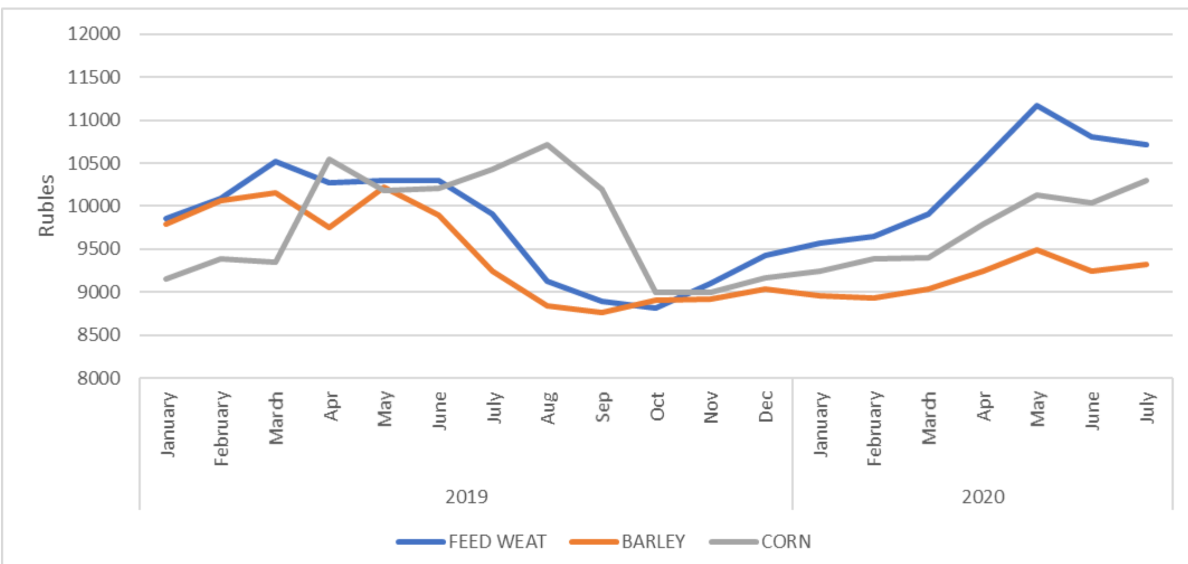
Source: FAS Moscow estimate based on data from Union of Poultry producers, information from companies; excluding Crimea

Most companies in the rankings are large diversified businesses, with complex value-added chains. They integrate growing grains and oilseeds, producing compound feeds, operating poultry farms and slaughter plants, distributing final products and operating cold storages and stores. Leaders of broiler industry are listed among the national top producers of compound feeds. Notably, 215 out of 240 of Russia's compound feed plants belong to large meat producing corporations. Twenty-five of the largest plants account for 55 percent of the 29.6 million MT of Russia's total production of compound feeds.

Weaker ruble values have damaged margins from domestic sales because the costs of imported breeding flock, feed additives, veterinary medicine, and equipment maintenance increased. The Gorbatov Center for Research of Food Systems published a study on "Covid-19 Threats and challenges for meat producers. Results of a panel survey." Seventy-five percent of the large diversified companies ("the federal producers" in terms of the study) reported positive financial results in April 2020, while 69 percent of smaller businesses ("the regional producers") did not achieve break-even results. A comparable distribution was reported for producers' expectations of annual financial results; 64 percent of the "regional" companies and 29 percent of the "federal" forecast declines in profitability. Leading companies are more resilient to lower margins because they have better access to credit, room for increased efficiency through the value-added chain, and better control over distribution. Most likely industry leaders will increase their market shares at the expense of smaller and less efficient players and market consolidation will intensify in 2021.

Feed base. Local Grains.
Locally harvested forage wheat, barley, corn, sunflower and soybean meals account for the major part of broiler rations in Russia. Key ingredients in feeds, these crops are also Russia's export commodities. GOR has a history of using protectionist measures to eliminate the spikes in feed prices resulted by global fluctuations. Average grain prices inside Russia sharply increased at the end of the first quarter of 2020 reflecting the depreciation of the ruble[2] and elevated demand from foreign buyers due to COVID-19. In March 2020, the GOR imposed a quota limiting exports of wheat, barley, corn, and rye to 7 MMT. The measure was explained by food security reasons during the COVID-19 pandemic. The quota was in place from April 1 till June 30, 2020. (Please refer to: RS2020-0014). Agriculture Minister Dmitry Patrushev told media "We want the quota mechanism to become permanent. We plan to define the quota's parameters together with market participants after receiving the final data on the new season's harvest - presumably in October". Grain exports most likely will be subject to quotas from January to June 2021 to guarantee sufficient domestic supply for production of feeds. Additionally, sales from the State Grain Reserves will be activated if necessary.

Chart 4. Russia: Average Producer prices for forage wheat, barley and corn. Rubles per MT. Excluding VAT.



Source: Ministry of Agriculture of Russian Federation

On June 30, 2020, at the end of 2019/2020 marketing year for grain, the average producer price (excluding VAT) for forage wheat was 10,858 Rubles (156.8 USD) per MT; a 5.3 percent increase over June 2019. Barley was priced at 9,807 Rubles (141.6 USD) per MT; 6 percent less than the previous year and corn prices were 10,231 Rubles (147.8 USD) per MT; a one percent decrease from the previous year. Russia is harvesting a good grain crop in 2020; total grain production is expected to exceed 120 MMT, where wheat may reach 78 MMT. Good crop and continued domestic market protection policies of the government promise a sufficient supply of attractively priced grain components for feeds in 2021.

[2] The ruble depreciated 13.9 percent against the U.S. dollar in March 2020 from 66.99 on 03.01.20 to 77.73 rubles per U.S. dollar on 04.01.20

Feed base. Imported ingredients.
Russia used 5.5 MMT of soybeans, including 2.070 MMT of imported beans in 2019. Imports accounted for 37.6 percent of the total national consumption of soybeans in 2019. The Federal Customs Service of Russia reports a 30 percent increase of soybean meal imports in January-August 2020. Despite the expected growth of domestic production in 2020-2021, prices on imported soybeans and soybean meals will remain a significant influence on poultry feeds.

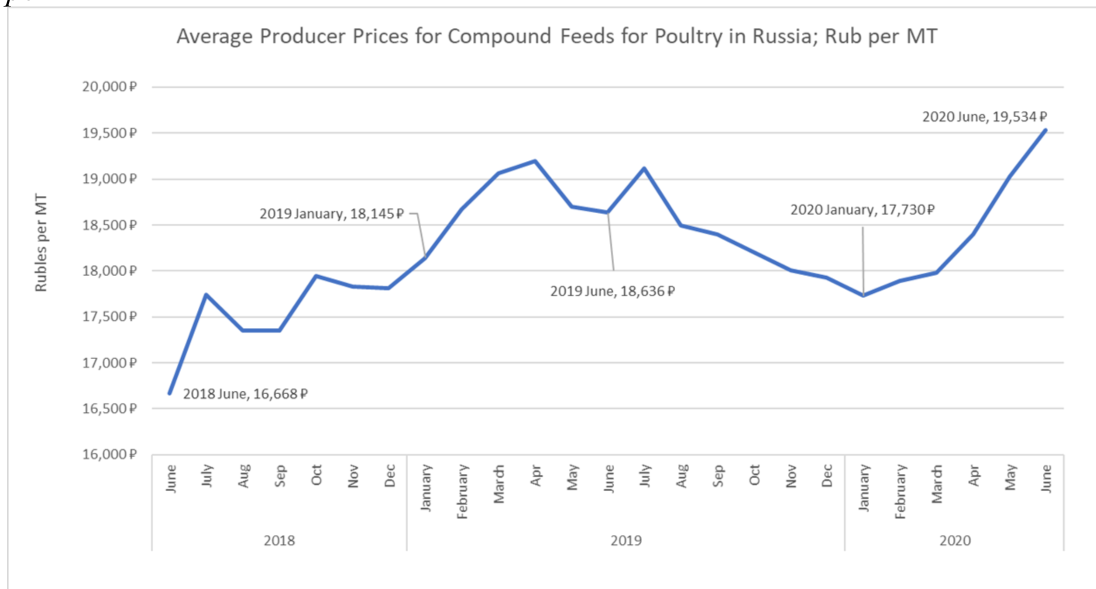
When the Ruble sharply depreciated in March 2020, the GOR immediately introduced several measures to protect the market from the spike in soybean prices. On March 31, 2020 the Eurasian Economic Commission (EEC),[3] banned exports of several agricultural commodities, most notably sunflower seeds and soybeans from the EAEU from April 12, 2020 through June 01, 2020. The measure was announced as part of the EAEU coronavirus pandemic response (Please refer to RS2020-0013 and RS2020-0030). Then, on April 16, 2020, the Russian Government issued a Decree simplifying the import of soybeans and soy meal for feed. The Decree allowed imports of certain genetically engineered (GE) soybeans and soybean meal for feed without state registration [4]for the period from April 20, 2020 through January 1, 2021 (Please refer to RS2020-0022 and RS2020-0027 for details).

Most likely, the supply of soybeans will be sufficient in 2020-2021, but the domestic market protection measures will not fully offset the negative impact of the ruble depreciation. The average price 26,303 rubles (369 USD) per MT for soybeans in July 2020 is 22 percent higher compared to July 2019. Along with soybeans, Russian producers of compound feeds import up to 90 percent of vitamins, enzymes, amino acids, and veterinary medicines. According to estimates of the industry experts, the share of all imported ingredients in the price of feeds is approximately 23 percent. That makes the market susceptible to changes in the currency rates and disruptions of supply chain.

Average producer prices of compound feeds for poultry was 19,534 Rubles per MT in June 2020, 4.8 percent increase from same month in 2019.

[3] The regulatory body of the Armenia-Belarus-Kazakhstan-Kyrgyzstan-Russia Eurasian Economic Union (EAEU)
[4] Applies only to GE soybeans and GE soymeal whose registration has expired and must be accompanied by the Expert Conclusion from Rosselhoznadzor that was granted when the feed was previously registered.

Chart 5. Russia: Average Producer prices for compound feeds for poultry in 2018-June 2020. Rubles per MT



Source: Rosstat

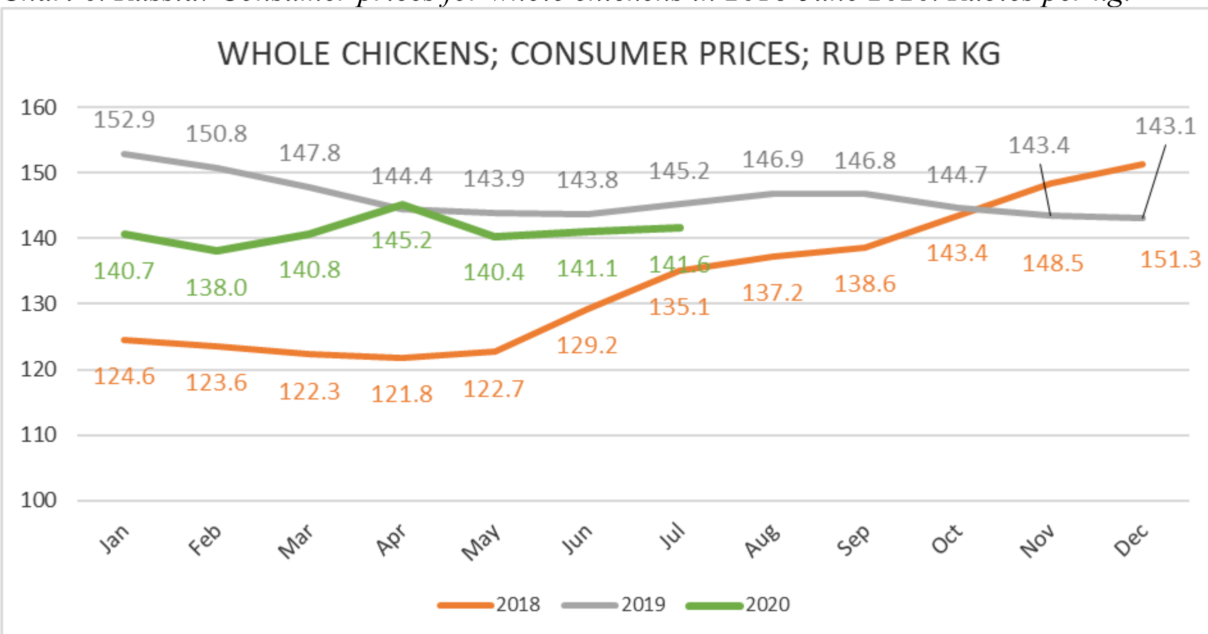
Consumption of Chicken Meat

Purchasing power of Russian consumers has being falling since 2014. Covid-19 related business disruptions and containment measures created additional pressure on businesses and wages. Real Disposable Income suffered the steepest fall in the second quarter of 2020, plunging record 8 percent. The annual accumulated decline of this key indicator is forecast to fall 3.8 percent in the most optimistic scenarios. Even if the fragile recovery starts as expected in 2021, disposable incomes in Russia will be far below 2014. Per official estimates, 18.6 million people (12.6 percent of total population) live below poverty level; this number is forecast to increase by the end of the year. As the economic outlook remains unfavorable in the mid-term for any positive changes in consumer purchasing power, demand for the least expensive protein in the market will remain stable. Domestic consumption of chicken meat in 2021 is forecast at 4.715 MMT, unchanged from 2020. Growth of chicken consumption is not expected due to increased competition from pork. Consumer prices for pork in 2020 were on average 4.5 percent lower than in comparable months of 2019 due to abundant pork supply (please refer to charts 6, 7, 8 for details).

Sales of chicken meat soared at the end of March and beginning of April 2020, when households were purchasing additional food supplies after the government had announced quarantine measures due to COVID 19. While the demand from HORECA (hotel, restaurant, café) dropped at the end of April 2020 when the sector was hit by closures of dine-in restaurants for quarantine, the demand for chicken meat in retail exceeded the supply. Producers had to redirect the supply between distribution channels in the emergency mode. The quarantine measures were eased in the end of the second and beginning of the third quarters of the year, but the demand for chicken meat remained strong because of the ban on international travel due to COVID-19. All families, who used to spend summer vacations outside the country stayed home or traveled inside the country which supported demand for meat.

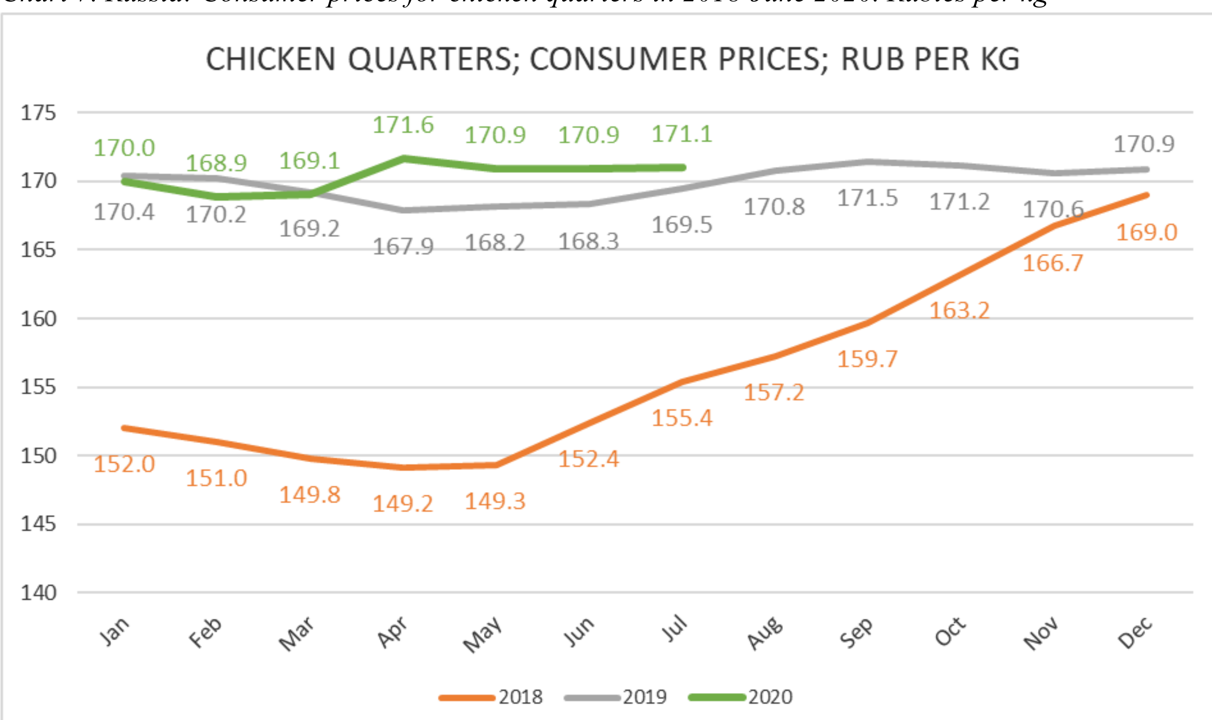
Whole chicken is the least expensive SKU and the most desirable during the times of crisis. Notably, retail prices for whole chicken remain 2-3 percent below 2019 levels due to abundant supply. Meanwhile, the prices for chicken quarters are approximately one percent higher, due to interest in chicken legs and drumsticks from exporters.

Chart 6. Russia: Consumer prices for whole chickens in 2018-June 2020. Rubles per kg.



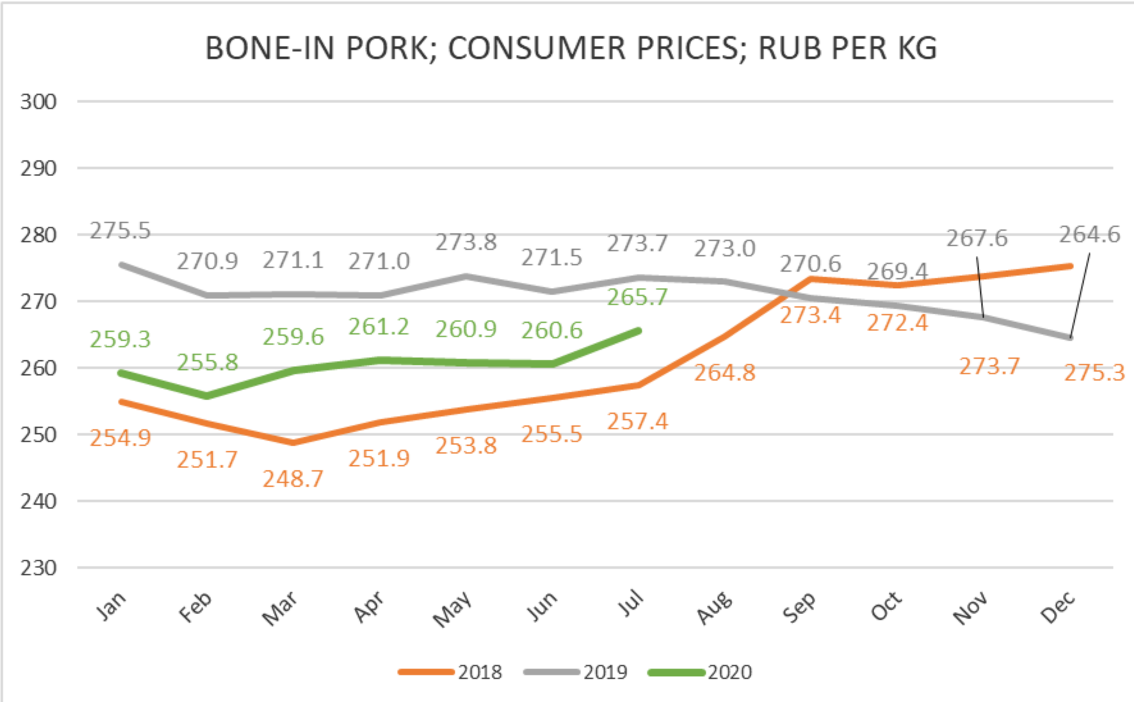
Source: www.fedstat.ru

Chart 7. Russia: Consumer prices for chicken quarters in 2018-June 2020. Rubles per kg



Source: www.fedstat.ru

Chart 8. Russia: Consumer prices for bone-in pork in 2018-June 2020. Rub per kg.



Source: www.fedstat.ru

Chicken Meat Trade

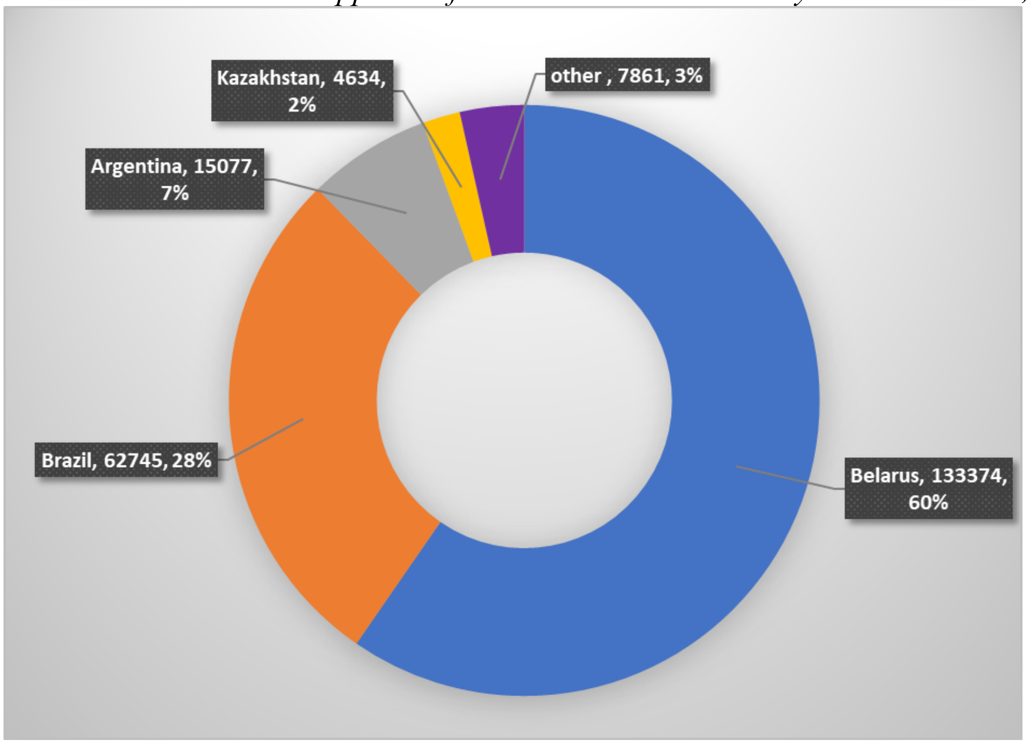
Imports

Imports in 2021 are forecast to decline to 210,000 MT (RTC) from 220,000 MT (RTC) expected in 2020. Total imports of chicken meat in the first half of 2020 were 111,588 MT (RTC), which is 2,728 MT more compared to same months in 2019. Russia increased imports of frozen chicken quarters and drumsticks due to favorable prices for these cuts in the current market. A weaker ruble and growing domestic output most likely will constrain further increases of imports in the second half of the year.

Belarus and Brazil remain major suppliers of chicken meat to Russia. These two countries account for 94 percent of Russia chicken imports; both suppliers increased their shipments in the first half of 2020 compared to the same period in 2019. Belarus shipped 67,988 MT; a 3.5 percent increase. Imports from Brazil increased 25 percent and reached 36,909 MT (RCT). Meanwhile imports from other key suppliers, Argentina and Kazakhstan, decreased to 3,364 and 1,424 correspondingly.

Brazil's exports to Russia are comprised of 52 percent frozen boneless chicken meat under HS code 0207141009, 35 percent frozen chicken quarters under HS code 0207142009 and 10.5 percent frozen chicken breasts under HS code 0207141001. Seventy-six percent of imports from Belarus is chilled chicken meat; 4 percent is processed ready to eat products, and only 20 percent is frozen cuts.

Chart 9. Russia: Main Suppliers of Chicken Meat to Russia by Volume in 2019; Metric Tons.



Source: Trade Data Monitor

The market remains closed for the United States and some other key suppliers until the end of 2020 due to counter-sanctions that were introduced in 2014 [5]. As of the date of the report, the GOR has not extended the embargo through 2021 and there were no announcements of any intensions to lift the restrictions.

<u>*Exports*</u>

FAS/Moscow forecasts 220,000 MT (RTC) of chicken meat exports in 2021, an increase from 215,000 MT (RTC) expected in 2020. Russia exported 111,439 MT(RTC) of chicken meat in January-June 2020, which is 58.8 percent higher than the same months of 2019. The trade is currently growing mostly because of the shipments to China, which has been open for Russian poultry since May, 2019.

Exports to China

Despite of the COVID-19 related difficulties with sea shipments in the first quarter of 2020, China quickly became the major destination for chicken exports from Russia. Shipments to China accounted for 62 percent of Russia's exports in the first half of 2020. The Federal Customs Service of Russia reports 76,753 MT of chicken meat shipped to China in January-June 2020 including 42,119 MT of Frozen chicken claws (HS Code 0207149909); 25,564 MT of Frozen mid-joint chicken wings (HS Code 0207143009); 4,637 MT frozen chicken legs /drumsticks (HS Code 0207146009) and 3,217 MT of Frozen chicken thighs (HS Code 0207147009). The value of this trade reached 141,709,821 US dollars. If the epizootic situation remains favorable, the trade is expected to continue in 2021. However, growth at the same pace is unlikely due to intensified competition with other suppliers.

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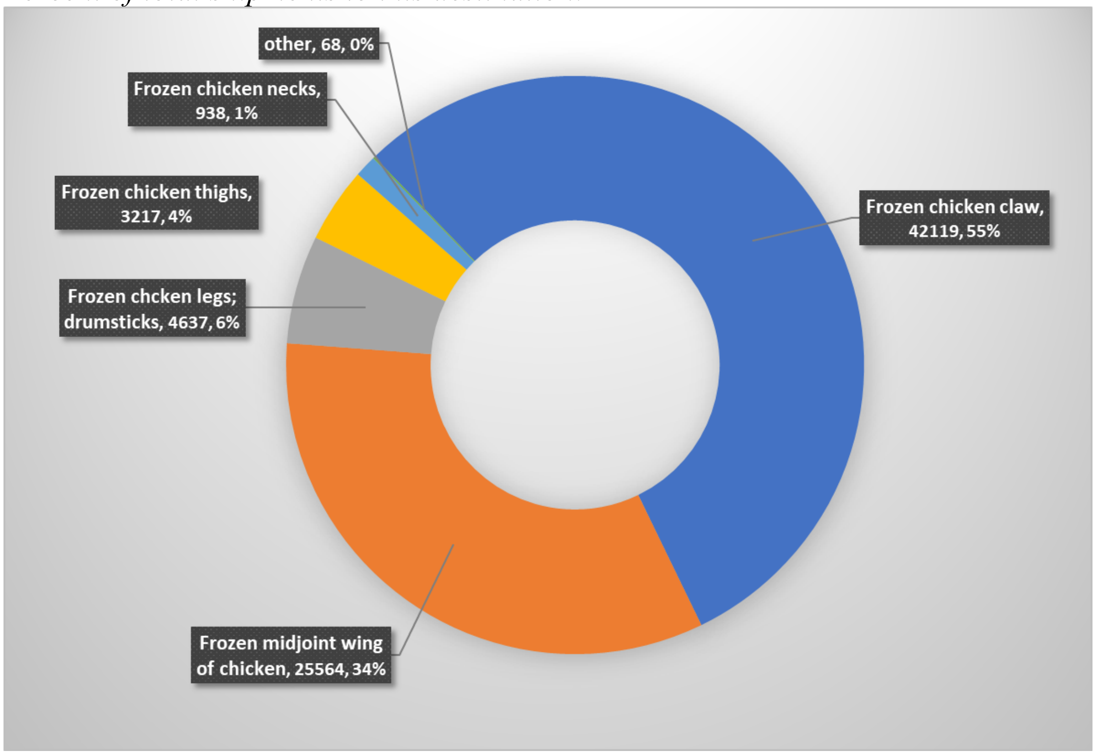
[5] USDA GAIN REPORT RS1907 Russia Extended Food Import Ban Through 2020

Chart 10. Russia: Exports of chicken meat to China in January-June 2020. Types of products. MT; Percent of total shipments to this destination.



Source: Federal Customs Service of Russia

Russian exporters managed to successfully use the momentum to enter the Chinese market as demand for chicken increased to substitute for reduced supplies of pork after African Swine Fever swept through China. The Russian market is now saturated with chicken meat, so producers are striving for new markets. As of the date of the report, forty Russian poultry plants and fifteen cold storages have been approved for exports to China. The largest exporters are GAP "Resurs, "Cherkizovo", "Miratorg", and "Belgrankorm".

According to industry contacts exporters face the following issues:

- Short shelf life, long delivery time. Most of the products were exported through the ports of St. Petersburg and Novorosiysk. Average delivery time by sea is currently 55-60 days. Maximum shelf life of frozen poultry from Russia is 12 months. Due to delays in delivery caused by COVID-19, some shipments were stuck and arrived to importers with limited remaining shelf live. Shipments by rail can reduce the delivery time to 15-16 days but are expensive compared to sea.
  Exporters are currently cooperating with Russian Railways and the public sector to consolidate shipping efforts and develop effective rail routes for refrigerated exports to China[6].

[6] In May 2020 GAP "Resource" shipped the pilot shipment of 24 MT of frozen poultry from Selyatino railway terminal in Moscow region to Chongqing, China. The project was supported by RZD Logistics and the Russian Export Center (REC), a state-owned institution for promoting non-commodity exports. The expected delivery time was 15-16 days. The single

- Exports are non-branded, only to BTB channels; exporters have no control over distribution. Contacts with market are limited to the importer level. No Russian brands have captured market attention in China.
- Requirements for large volumes and consistent quality of products requires stronger cooperation between players who do not have experience in undertaking joint marketing efforts.

According to the Agroanalytics Center of the Ministry of Agriculture most of poultry meat for China was shipped from the following the areas: the Moscow region - 15.6 thousand MT, Stavropolkiy Krai - 16.2 thousand MT, Bryansk region - 5.1 thousand MT, Belgorod region - 7.1 thousand MT, Krasnodarskii Krai - 5.8 thousand MT.

Other exports

Russia continues shipping chicken to the Donetsk and Luhansk regions of Ukraine[7], which was the largest export market in 2017-2019 with annual shipments of 42,000-49,000 MT. Exports to this market most likely will reach 45,000 MT in 2020 and continue at comparable level in 2021.

Russia's exports to its partners within the EAEU totaled 54,197 MT of chicken in 2019. Exports to EAEU countries increased 26 percent in the first half of 2020 with specific distribution as follows: Kazakhstan 24,638 MT (+54.33% YTD), Kyrgyzstan 4,488 MT (-31.19% YTD), Armenia 2,426 MT (+3.59%) and Belarus 582 MT (25%).

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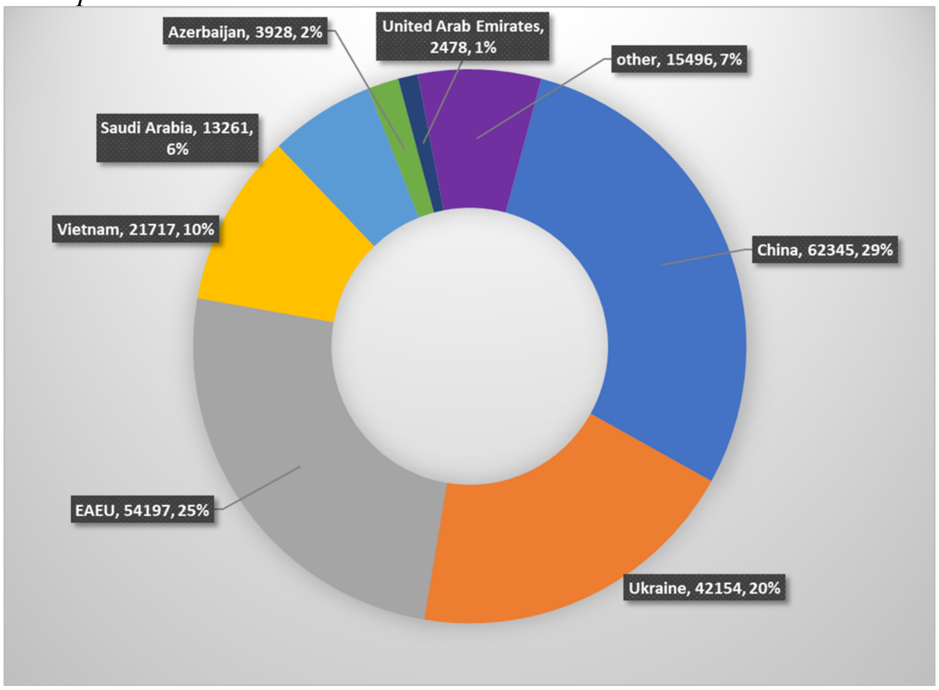
refrigerated container went through Kazakhstan and was transshipped at the terminal in Khorgos. The main goal of the private-public logistical project is to make the Selyatino – Chongqing connection regular route for delivering food products. RZD Logistics has been developing its Agroexpress services, a series of refrigerated container trains for agricultural goods, since September 2019.

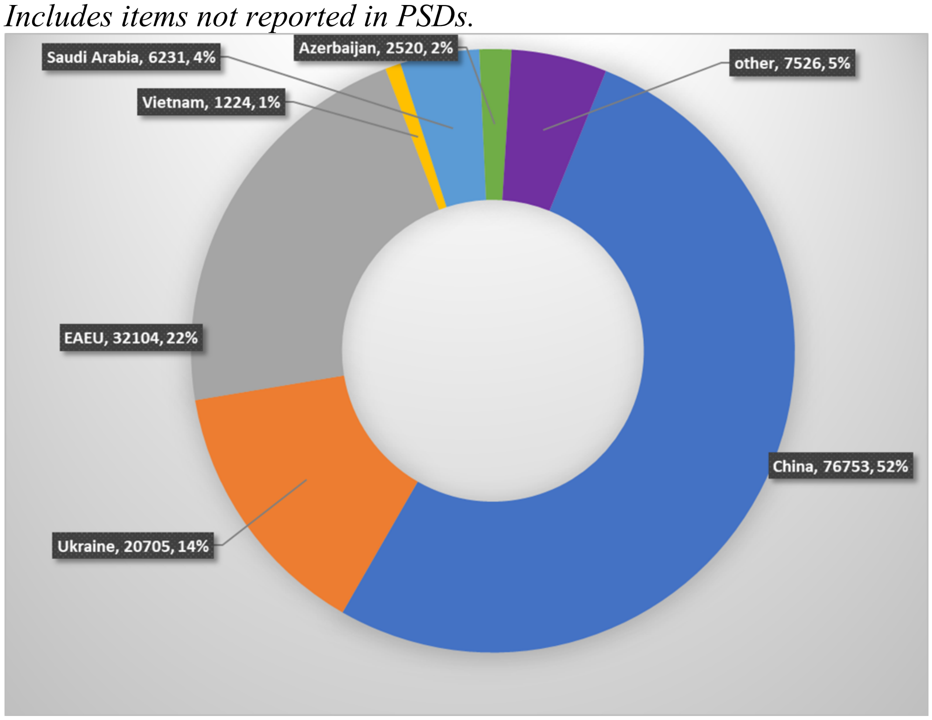
[7] The State Customs Committee of Ukraine does not report these imports from Russia.

Chart 11. Russia: Main Destinations of Chicken Meat Exports by Volume in 2019; MT. Includes items not reported in PSDs.



Source: Trade Data Monitor. Includes commodities not reported in PSDs.

Chart 12. Russia: Main Destinations of Chicken Meat Exports by Volume in January-June 2020; MT. Includes items not reported in PSDs.



Source: Trade Data Monitor. Includes commodities not reported in PSDs.

Table 2. Top-20 Russia's Broiler Meat Producing Companies in 2018-19

	# in 2019	# in 2018	Company Name / Location	Chicken Meat Production in 2018; live weight; 1,000 MT	Chicken Meat Production in 2019; live weight; 1,000 MT	Change in production in 2019; live weight; 1,000 MT (%)
	1	1	"Cherkizovo" Group Bryansk Oblast, Lipetsk Oblast, Moscow Oblast, Penza Oblast; Voronezh Oblast, Altaiskii Krai Kursk Oblast	626	766	140 (+22%)
	2	2	GAP "Resurs" The Republic of Adygeya; the Republic of Karachaevo-Cherkessia; Krasnodarskii Krai, Stavropolskii Kraj, Rostov Oblast; Tambovskaya Oblast	615	645	30 (+4.9%)
	3	3	"Prioskolie" Belgorod oblast, Altaiskii Krai	505	452	-53 (-10.5%)
	4	4	"Agrokomplex named after N. Tkachyov" Krasnodarskiy Krai, Rostovskaya Oblast, Republic of Mari-El, Stavropolskii Krai.	291	346	55 (18.9%)
	5	5	"Belgrankorm" Belgorod Oblast, Novgorod Oblast	279	287	8 (2.9%)
	6	7	"Severnaya" poultry plant Leningradskaya Oblast	252	253	1 (0.3%)
	7	8	"Prodo" Kaluga Oblast; Novosibirsk Oblast; Omsk Oblast; Perm Oblast; Tyumen Oblast	194.6	191	-3.6(-1.8%)
NEW IN RAITING	8	N/A	"Poultry Growers Assets Trust" (Bank Trust manages broiler plants of "Belaya Ptitsa" Belgrodskaya Oblast; Rostov Oblast (filed bankruptcy in 2018) and Zdorovaya Ferma	(262 + 107.8) 369.8	(172+130) 302	-67.8 (-18.3%)

	# in 2019	# in 2018	Company Name / Location	Chicken Meat Production in 2018; live weight; 1,000 MT	Chicken Meat Production in 2019; live weight; 1,000 MT	Change in production in 2019; live weight; 1,000 MT (%)
			Chelyabinskaya Oblast (trust purchased 69% of the company stocks in 2019)			
	9	9	“Miratorg” Bryansk Oblast	140	151	11 (7.8%)
	10	10	“Sfera” Republic of Mordovia (Broiler plant “Chamzinskaya”)	129	140	11(8.5%)
	11	11	Chelny-Broiler (“Agrosila”) Republic of Tatarstan	121.2	123	1.9 (1.5%)
	12	13	Ravis Sosnovskaya Poultry Plant Chelyabinskaya Oblast	99.6	104	4.4 (4.4%)
	13	14	SITNO Chelyabinskaya Oblast	90.3	93	2.7 (2.9%)
NEW IN RAITING	14	N/A	AK Bars Holding Republic of Tatarstan		89	
NEW IN RAITING	15	N/A	Agroholding “Sibirskiy Premier” Novosibirsk Oblast		85	
	16	14	Agrofirma Octyabrskaya Republic of Mordovia	85.1	84	-1.1 (-1.2%)
	17	16	Elinar Broiler Moscow region	74.3	77	2.7 (3.6%)
	18	17	“Ecoptitca” Lipetsk Oblast	70.5	70	-0.5 (-0.07%)
NEW IN RAITING	19	n/a	Volovsky Broiler, Tulskaya oblast		63	
	20	18	Reftinskaya poultry pant, Sverdlovsk region	65.1	62	-3.1 (-4%)
			Total Top 20		4,383	

Source: FAS-Moscow Estimate based on data from Union of Poultry producers and information from Companies

Table 3. Chicken Flock Inventories for Reference (Excluding Crimea where possible):

	January 1, 2019	January 1, 2020	July 1, 2019	July, 1 2020	comments
Hens and Roosters; Agricultural Organizations	404,690.191	415995.067			1,000 head Source: Rosstat, bulletin "State of Livestock sector on January 1, 2020" published on March 17th, 2020
Poultry flock, excluding chicken and geese; Agricultural Organizations	9,348.011	10,762.792			1,000 Head Source: Rosstat, bulletin "Livestock sector as of January 1, 2020" published on March 17th, 2020
Poultry flock; Agricultural organizations (all types of fowl)	449,289	449,091	442355.14	445767.30	1,000 head; Source: Rosstat: "Production and shipment of agricultural goods in January July 2020". Published on July 14, 2020
Poultry flock; all farms (all types of fowl, includes agricultural organizations, small individual and backyard farms)	541,447	544,691	554,163.725	555,459.072	1,000 head; Source: Rosstat: "Production and shipment of agricultural goods in January July 2020". Published on July 16, 2020

Table 4. Poultry Meat Production, Rosstat (Excluding Crimea, including offals and turkey meat)

	2017 (for reference)	2018 (for reference)	2019	Jan-Jun 2018 (for reference)	Jan-Jun 2019 (for reference)	Jan-Jun 2020	comments
Poultry Meat Production, live weight, all farms	6549.6	6591.3	6609.1	3229.482	3195.851	3221.238	1,000 MT Source: Rosstat "Livestock sector production in 2019" and Rosstat "Agricultural production in January-June 2020"
Poultry Meat Production, slaughter weight, all farms	4892.6	4919.8	4938.6				1,000 MT Source: Rosstat "Livestock sector production in 2019"

Attachments:

No Attachments