USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 8/16/2004

GAIN Report Number: RS4042

Russian Federation

Livestock and Products

Russian Pork Production To Recover in 2005

2004

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Report Highlights:
Russian production of meat is forecast to remain stable in 2005 as three percent growth in pork output offsets a drop of four percent in beef. The Russian beef herd is forecast to continue its decline as it deals with the consequences of high slaughter rates in 2003/04 that severely diminished herd size. Russian imports are not forecast to completely fill tariff rate quota (TRQ) levels on pork or beef due mainly to problems in Russia's administration of the measures in Q1 2004.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Moscow [RS1]
[RS]

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Executive Summary

Production of meat is forecast to remain stable in 2005 as growth in pork production increases by three percent, to 1.79 million metric tons (MMT). As a result of better supplies of feed, the Russian pig crop is expected to expand faster and the slaughter rate and size will return to normal levels. The Russian beef herd and production is forecast to continue its decline as it deals with a poor financial situation from 2003/04 and consequences of slaughter rates that severely diminished herd size. Russian imports in 2005 are forecast at 500,000 MT and 700,000 MT for pork and beef. Strong exports from Ukraine and other Commonwealth of Independent States (CIS) countries are playing a growing role due to their preferential access to the Russian market. However, Russian imports are not forecast to completely fill the TRQs due to problems in administration in Q1 2004 and policy and market changes relating to the European Union and its expansion.

Production

Russian Federation swine production is forecast to increase by three percent in 2005, to almost 37 million pigs. Improvements in the feed supply and continued high prices are expected to support increased herd numbers. Pork production is also forecast to increase by three percent in 2005 due to the larger pig crop and a return to normal slaughter weights. Forecast 2004 pork production was decreased by one percent compared to the previous forecast due to a high slaughter rate at less than average weights. Slaughter rates in the spring of 2004 were high due to low feed availability, which should return to normal as a result of an adequate grain crop.

Table 1. Number of Livestock 2002-2004, as of Jan. 1, 1,000 head

	2002	2003	2004	As of July 1, 2004
Cattle	27,107	26,524	25,027	26,100 (-6%)
Including cows	12,215	11,754	11,103	11,000 (-5.7%)
Pigs	16,048	17,337	16,512	16,300 (-1.1%)
Sheep and goats	15,327	16,051	16,235	19,900 (+4.6%)

Source: Russian State Statistics Committee

Cattle beginning stocks are forecast to decrease by six percent in 2005, continuing their decade-long decline. Throughout 2005, the cattle herd is forecast to decrease a further five percent due to low production and reproduction efficiency. As a result, beef production is expected to fall by four percent in 2005. Production of beef also fell by about four percent in 2004, as the poor feed situation prompted producers to slaughter animals rather than pay high grain and fodder prices.

Small farms continue to play a large role in Russia's livestock industry (see RS4009 for more details). In 2004, small farms held 53.9 percent of all cattle, 50 percent of pigs, and 72.4 percent of sheep and goats, compared with 51.9 percent, 46.7 percent and 71 percent in July 2003. The increasing percent of livestock on the smaller farms resulted from reduction in the number of large farms due to the strain of high grain and fodder prices from the fall of 2003 through spring of 2004. Though the overall efficiency of small farms is generally lower than big enterprises, in times of trouble the small farmers hold or increase animal numbers as a store of wealth. By providing a continuous supply, small farms have helped agricultural producers and the meat processing industry survive. Generally, agricultural experts view large, corporate-style farms as the future of Russian livestock husbandry, while small farms will cover the needs of farmers markets and rural families.

Table 2: Structure of Russian Livestock Herds, in percent, by type of producer

	Jan. 2002	Jan. 2003	Jan. 2004	July 2004
Agriculture Enterprises (Collective and State Farms)				
Cattle	58.4	56.6	53.9	NA
Including cows	49.8	48.1	46.1	NA
Pigs	54.1	53.3	50.1	NA
Sheep and goats	29.0	29.0	27.60	NA
Private Households ("Private Subsidiary Plots")				
Cattle	39.4	40.8	43.0	45.3
Including cows	47.9	49.0	50.8	
Pigs	43.1	43.8	46.6	50.3
Sheep and goats	63.1	59.6	60.9	56.9
Private Farms ("Peasant Farms")				
Cattle	2.2	2.6	3.1	NA
Including cows	2.3	2.7	3.1	NA
Pigs	2.8	2.9	3.3	NA
Sheep and goats	7.9	11.4	11.5	NA

Source: Russian State Statistics Committee

Table 3. Production of Livestock Products 2001-2004, 1,000 MT

	2001	2002	2003	January-June 2004
Meat and poultry (live weight), all producers	7,000	7,316	7,661	3.1 (100.7 as % of January-June 2003%)
Including				
Agriculture Enterprises	2,846	3,102	3,344	NA
Private Households	4,017	4,071	4,145	NA
Private Farms	137	143	172	NA

Source: Russian State Statistic Committee

Regional Production

Production factors differ widely from region to region in Russia (see Tables 8-10). Southern oblasts (Krasnodar, Rostov, Stavropol) are famous of their excellent agricultural conditions and soil fertility, agricultural production in Bashkortostan and Tatar republic is strongly supported by the state, while climatic conditions are more risky for in other regions. The tables provide a good overview of regional differences.

Feed supplies

By the beginning of August 2004, grain stocks in Russia were depleted to the lowest level in the last four years (see Tables 12 and 13). Compound feed and fodder are up compared to last year, which will hold down the soaring costs for animal feed. However, energy prices are so moving up and will pressure the producers' bottom line.

Due to the high prices and poor feeding conditions resulting from producers' efforts to save money, efficiency dropped significantly in 2003. The steady increases in both cattle and pig reproductive efficiency since 2000 were reversed by sharp drops in 2003. The average loss per herd also increased in 2003 due to the higher stress and poor feeding conditions.

Table 4. Livestock Crop

	2001	2002	2003
Calf crop, per 100 Cows	76	78	75
Piglets, per 1000 Sows	1,360	1,416	1,332
Lambs and Kids, per 100	77	79	79

Source: Russian State Statistics Committee

Table 5. Losses, as percent of the herd turnover

	2001	2002	2003
Cattle	3.2	3.0	3.3
Pigs	9.9	9.6	10.7
Sheep and goat	7.1	6.0	5.6

Source: Russian State Statistics Committee

Consumption

Pork consumption is forecast to grow by two percent in 2005, while beef consumption will remain stable. Consumption forecasts for pork in 2003 were reduced due to forecast lower pork imports. The steady growth in pork and beef prices due to the restrictions of the TRQs will continue to dampen Russian meat consumption and force consumers to purchase lower quality meat products or shift to other competing products such as poultry or fish.

Food Safety Issues

According to the Federal Service for the Protection of Consumer Rights, food poisoning rates have significantly increased in the Russian Federation. With regard to this, Russia's chief epidemiologist, Gennadiy Onishchenko, issued an order tightening control over companies engaged in producing and selling food products in the Russian Federation. According to the order, control in the Russian Federation should be strengthened over the production and sale of food products (including cream-filled confectionery, culinary products, meat, dairy and fish products) and special attention should be paid to the work of medium and small businesses. Food industry plants should not be opened without a program of production control and should have their own production laboratories. Consumers and processors generally agree that there needs to be greater oversight over food quality after several recent outbreaks related to poor sanitary control and unlicensed small producers.

Trade/Policy

Russian pork imports are forecast to remain stable in 2005, while beef imports are forecast to increase eight percent, to 700,000 MT. The previous pork import forecast for 2004 was lowered by 11 percent, to 500,000 MT, due to poor implementation of the 2004 pork import quota and fluctuations in European supply and prices resulting from the expansion of the European Union. Russian beef imports are forecast to remain at about 700,000 MT in 2005. The estimate for Russian imports of beef in 2003 was revised upward by 10 percent. This revision (in carcass weight) results from official data that showed higher than expected overall imports in November and December, a significant upward revision for non-Ukraine CIS imports outside the TRQ, and higher than expected ratio of boneless to bone-in beef.

Table 6: Russian Meat Imports, 2002-2004, MT

	2002	2003	January-May 2004
Poultry	1,375,039	1,188,379	334,358
Pork, fresh or frozen	602.010	533,871	154,892
Beef, frozen	469,141	495,031	127,620
Edible animal offal	216,144	219,484	71,666
Beef fresh/chilled	35,459	10,015	4,956

Source: World Trade Atlas

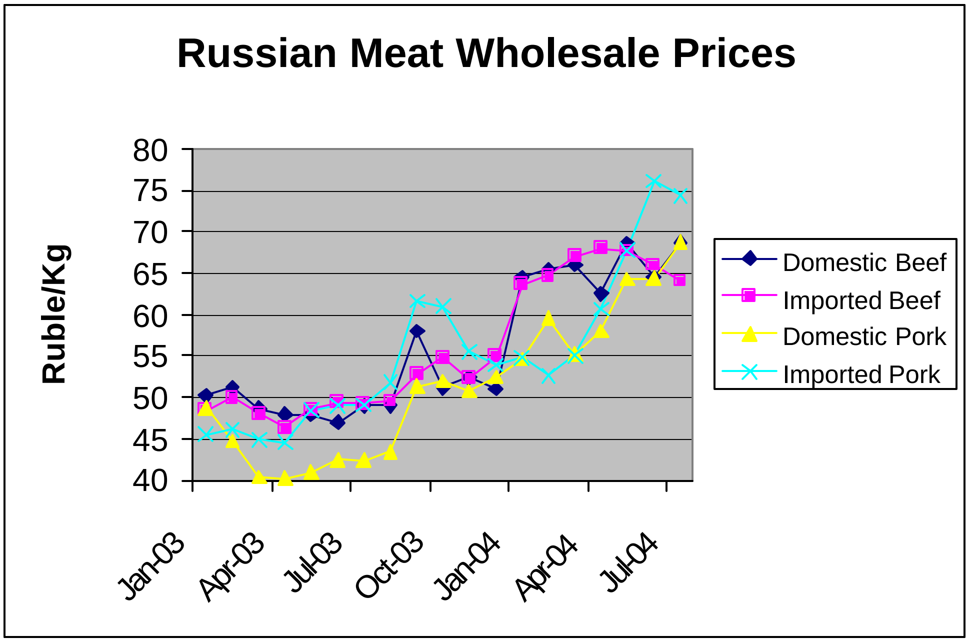
As reported in several GAIN reports over the first half of 2004, market access for exporters of meat to Russia has deteriorated compared to 2004. (See GAIN reports: RS4013, RS4016, RS4029, RS4033, and RS4036).

As noted in RS4029, Government actions to decrease market access for imports and high feed prices forced prices for meat higher in the Russian Federation since mid-2003. The single biggest factor was the intoduction of a 1.05 million metric ton quota on poultry meat and TRQ on beef and pork in 2003 (420,000 MT and 450,000 MT). Poor implementation of these measures has caused price swings due to traders' uncertainty about their ability to effectively cope with anticipated measures. Russian Customs data shows that January and February were fully disrupted and March partially disrupted by the poor implementation of the quota and TRQs. Expectations of another average crop year will likely bring some relief as domestic producers cope with high feed costs, but will not permit domestic producers to fully relieve the price/supply crunch. Prices are set to rise farther when the market senses no relief for domestic producers or for key suppliers in Ukraine, while imports remain limited. The Russian Government has actively been involving itself in the meat market over the past year and various actions it has taken have combined to reduce feed grain availability and drive overall meat prices higher. Below is a brief outline of the events that have been shaping the Russian market since 2003.

- *May/June 2003* – Introduction of quota on poultry meat and TRQs on beef and pork
- *Late Fall/Winter 2003* – Mediocre grain harvest and poor fodder crop plus significant Russian grain exports
- *Winter 2003/04* – Avian Influenza in Asia raises global poultry prices
- *December 2003* – Rush to fill 2003 quota and TRQ in anticipation of subsequent problems issuing initial 2004 import licenses
- *January/March 2004* – "Technical" problems allocating quota and TRQs leads to almost three months with significantly reduced meat and poultry imports
- *June 2-8, 2004* – Russia temporarily halts all EU imports due to unsuccessful negotiations over a unified veterinary certificate
- *Spring/Summer 2004* – Expectations of average crop production and little price relief for domestic feed grains as a strong poultry and swine sector maintain domestic demand growth.
- *May- September 2004* – Re-inspection of plants in ten new European Union members.

The forecast for 2004 Russian imports assumes incomplete TRQ fill for pork and beef (chilled and frozen). The main reason for this is the above-mentioned delay in distributing TRQ licenses in the first quarter of 2004. Additional factors likely to eliminate complete quota fill are the diversion of meat (mainly pork) from new EU member states that had formerly exported to Russia, namely Poland. The process of re-inspection of new EU member plants will also somewhat hinder Russian imports in the late summer as plants wait to be inspected and some fail the inspection and are removed from eligibility. Last, the dispute between EU and Russian veterinary authorities on the single veterinary certificate had some short-term effects in May.

While all importers holding a license have incentive to use it or lose it before the end of 2005, there are limitations in terms of storage space. There will also be difficulties because importers will all try to finalize shipments in December and this will push prices down. Importing a lot of product under these circumstances may likely be unprofitable and cause companies to forgo excessive late 2004 imports.



Strong import demand from CIS countries will also be a factor, especially in beef. Exports grew briskly for Mongolia, Kazakhstan, and Moldova, reaching over 22,000 MT of beef in 2003. This growth is expected to be strong again in 2004 as high Russian prices attracts product from neighboring countries that are not included in the beef and pork TRQs. Ukraine is expected to remain the largest beef exporter to Russia, with exports limited to what Ukraine is willing to sell. Ukraine is also emerging as a small, but more important exporter of pork to Russia. In the future, high prices in Russia and preferential access for CIS products will help Ukrainian producers and exporters.

Table 7: Russian Meat Import Quota Volumes for 2004

	Pork	Beef,	
		Frozen	**Fresh**
Total	450	420	27.5
Including			
EU	227.3	331.8	27
US	42.2	17.2	0
Paraguay	1	3	0
Other	179.5	68	0.5

Source: GOR Resolutions

Re-organization of Ministry of Agriculture

The Government of the Russian Federation passed a resolution on the Federal Veterinary and Phytosanitary Surveillance Service (Rosselkhoznadzor) on June 30, 2004. The resolution states that Rosselkhoznadzor is a Federal executive body that will have management and supervisory functions in veterinary services, quarantine, plant protection, the use of pesticides and agrochemicals, ensuring soil fertility, breeding, protection, replenishment, hunting, fish and other maritime species and protecting the population from diseases that affect people and animals. This service was formed from combining two separate departments, but remains within the Agriculture Ministry. It will be authorized to give out licenses for various types of activity in breeding, elite seed farming and permission (including the setting and lifting of restrictions) to import and export or transit products of animal origin, medicine, fodder and feed additives for animals and quarantine production. Rosselkhoznadzor will also make sure that Russian legislation is being adhered to at the Russian border and in transport, including requirements to protect the country's territory from the spread of infectious animal diseases, pests, pathogens, and quarantine plants. Former First Deputy Agriculture Minister Sergey Dankvert was appointed to head the Federal Veterinary and Phytosanitary Surveillance Service.

Trade Policy Issues With EU

Following the breakdown in negotiations over a single veterinary certificate, Rosselkhoznadzor has given the EU until September 1, 2004 to agree to a unified veterinary certificate for all member states. The Ministry of Agriculture has stated that trade will be halted without an agreement. One additional requirement is the re-inspection of all establishments that are supplying meat and dairy products from any of the ten new EU members. Russian Veterinary Service specialists have started checking enterprises in the Czech Republic, Hungary, Latvia, Lithuania, Estonia, and Poland. Only those enterprises that have been inspected by Russian specialists and fulfill Russian veterinary demands will have the right to export animal products after September 1. A list of exporters from the new EU member-countries will be made once the checks are completed. The list is currently made up of enterprises that have been certified by the European Commission.

The first results of inspection reportedly showed that Russian veterinarians included additional requirements regarding laboratory testing of water, raw material and the final products. Russian veterinarians recommended that the exported product be produced from local raw material and that the exporting plant be large enough to provide significant volumes of high-quality products.

Foot and Mouth Disease (FMD) Outbreak in the Russian Far East

The Russian Veterinary Service reported an outbreak of foot and mouth disease in the Amur region in mid-April 2004. FMD was detected at a research farm run by the Soya Institute along the border with China. The farm, which had 900 animals, bred high yielding Simmental cows. Quarantine, herd eradication, and surveillance measures were taken.

The National Research Institute for Animal Protection provided Russia's Far East, including Amur region, with FMD vaccine. The Institute also sent 50,000 doses of vaccine for hogs to the Far East as a preventative measure. The Institute is one of Russia's primary producers of vaccines and makes up to 50 million doses of FMD vaccine per year on three production lines. This completely covers the country's needs and allows it to export to other CIS countries, primarily Armenia, Azerbaijan, Georgia, Uzbekistan and Tajikistan. According to

Rosselkhoznadzor, Russia annually uses 11 million to 14 million doses of vaccine to immunize animals in areas with high FMD risk, especially the North Caucasus, the southern Volga River region, areas on the border with China, and other areas in Siberia and the Far East. This covers six percent of Russia's area and almost 18 percent of the country's cattle. Prior to the 2004 case, the most recent case of FMD in Russia was reported in 2000 at a research farm in Primorye, in Russia's Far East.

State Support

Most Russian regions support agricultural production to varying degrees. Regional subsidies are generally allocated on a per head basis on the precondition that the farm doesn't decrease its herd and is expected to sell the milk/meat to the local processing facility. Subsidies are also provided for production and sale of pork, horse, sheep, and cattle.

Marketing

The Moscow City Government plans to introduce a new system of financing food supplies for the city needs (schools, hospitals, etc). It will select food suppliers and provide financial support in return for providing the city with locally produced products. The selected suppliers are required to build modern processing and wholesale facilities using the city's investment money.

Table 8: Meat and poultry production, live weight, MT

Oblasts	2002	2003	2003 as % of 2002	Share of households in total production
Russia, total	7,300,000	7,700,000	104	54.1
Krasnodar	388,500	420,600	108	47.6
Bashkortostan	372,100	380,800	102	71.2
Tatar	281,300	295,400	105	46.9
Rostov	227,800	250,900	110	67.4
Altai	211,800	241,800	114	68,8
Stavropol	204,000	218,400	107	66.9
Novosibirsk	206,400	207,300	100	49.9
Belgorod	180,100	209,000	116	39.3
Voronezh	179,800	186,300	103	58.2
Moscow	142,600	159,500	112	20.0
Dagestan	103,700	126,700	122	86.1

Source: Russian State Statistics Committee

Table 9: Livestock Production in Russia by Key Regions, 1,000 head

	Cattle		Sheep and goats	
	2003	2004	2003	2004
Total Russia	26,500	25,000	16,100	16,200
Including				
Bashkortostan	1,780	1,738	746	774
Tatarstan	1,196	1,170	428	408
Altai	1,098	1,049	279	246
Krasnodar	922	862	125	113
Novosibirsk	864	820	252	234
Orenburg	840	825	287	293
Dagestan	760	794	3,175	3,330
Rostov	668	620	574	578
Voronezh	586	536	180	175
Moscow	488	440	76	70
Belgorod	471	419	59	55
Stavropol	434	403	1,363	1,329

Source: Russian State Statistics Committee

Table 10: Swine Production in Russia by Key Regions, 1,000 head

	Pigs	
	2003	2004
Total Russia	17,300	16,500
Including		
Krasnodar	1,785	1,590
Rostov oblast	923	777
Tatarstan	756	751
Altai	698	734
Bashkortostan	588	588.6
Stavropol	548	524
Belgorod	530	491
Voronezh	503	423
Novosibirsk	485	446
Orenburg	400	411

Source: Russian State Statistics Committee

Table 11: Wholesale Prices (Offer Price), January 2003 – July 2004.

Date	Exchange rate, ruble/$	Domestic beef	Imported beef	Domestic pork	Imported pork
01/30/2003	31.80	50.17	48.40	48.75	45.50
02/28/2003	31.57	51.17	49.95	44.75	46.14
03/30/2003	31.38	48.67	48.01	40.37	44.90
04/30/2003	31.10	48.00	46.35	40.25	44.62
05/30/2003	30.66	48.00	48.52	41.02	48.45
06/30/2003	30.34	47.00	49.45	42.51	49.00
07/30/2003	30.24	49.00	49.30	42.39	49.11
08/30/2003	30.50	49.00	49.57	43.50	51.83
09/30/2003	30.61	58.00	52.75	51.33	61.60
10/30/2003	29.82	51.17	54.81	52.00	60.93
11/30/2003	29.74	52.38	52.31	50.75	55.53
12/30/2003	29.25	51.00	54.96	52.50	53.89
01/30/2004	28.48	64.42	63.61	54.63	54.81
02/29/2004	28.52	65.50	64.68	59.50	52.67
03/30/2004	28.49	66.00	67.05	55.17	55.05
04/30/2004	28.88	62.50	68.00	58.00	60.69
05/30/2004	28.99	68.50	67.64	64.25	67.75
06/30/2004	29.03	64.50	65.99	64.33	76.05
07/30/2004	29.09	68.75	64.02	68.68	74.37

Source: Russian Institute for Agricultural Market Studies (IKAR)
Prices are in rubles per kilogram.

Table 12. Feed Production as of July 12 (2003-2004).

	2004	2003	2004 as % of 2003	2003 as % of 2002
Hay harvesting, mln hectares	6.3	6.4	97.6	81.7
Hay stored, MT	4.0	3.6	112.4	66.0
Dried silage	7.5	6.2	121.7	81.8
Silage	4.2	4.0	106.0	106.4
Feed stocks				
Total, MMT, of conditional units	5.0	4.3	114.9	77.1
Per conditional cattle, MT *	0.43	0.34	126.5	81.0

Source: Russian State Statistics Committee
* See Table 14 for explanation of conditional cattle units.

Table 13. Compound Feed Production, MT

	2002	2003	2004
QI	2,038	2,199	2,219
QII	2,165	2,255	2,232
1H	4,203	4,454	4,451

Source: Russian State Statistics Committee

Table 14: Livestock Conversion Factor: Calculations of "Conditional Cattle Units"

Type of livestock	conversion factor
Adult cattle	1.0
Calves, more than 1 year old	0.50
Calves, less than 1 year old	0.12
Adult pigs	0.50
Piglets, more than 4 month old	0.25
Piglets less than 4 month old	0.05
Adult sheep and goat	0.10
Lamb	0.06
Adult horses	1.10
Colts, more than 12 month old	0.80
Colts, less than 12 month old	0.25
Poultry	0.02

Source: Manual "Statistics", A.F. Grishina, 2003

PSD Table

Country	Russian Federation						
Commodity	Animal Numbers, Cattle				(1000 HEAD)		
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Total Cattle Beg. Stks	23500	23500	22285	22285	20995	20995	(1000 HEAD)
Dairy Cows Beg. Stks	11700	11700	10970	10970	0	10640	(1000 HEAD)
Beef Cows Beg. Stocks	0	0	0	0	0	0	(1000 HEAD)
Production (Calf Crop)	8845	8845	8330	8400	0	8200	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Total Imports	9	9	10	10	0	10	(1000 HEAD)
TOTAL Imports	9	9	10	10	0	10	(1000 HEAD)
TOTAL SUPPLY	32354	32354	30625	30695	20995	29205	(1000 HEAD)
Intra EC Exports	0	0	0	0	0	0	(1000 HEAD)
Total Exports	8	8	5	5	0	5	(1000 HEAD)
TOTAL Exports	8	8	5	5	0	5	(1000 HEAD)
Cow Slaughter	1720	1720	1630	1650	0	1620	(1000 HEAD)
Calf Slaughter	0	0	0	0	0	0	(1000 HEAD)
Other Slaughter	8000	8000	7750	7785	0	7380	(1000 HEAD)
Total Slaughter	9720	9720	9380	9435	0	9000	(1000 HEAD)
Loss	341	341	245	260	0	200	(1000 HEAD)
Ending Inventories	22285	22285	20995	20995	0	20000	(1000 HEAD)
TOTAL DISTRIBUTION	32354	32354	30625	30695	0	29205	(1000 HEAD)

PSD Table

Country	**Russian Federation**						
Commodity	**Meat, Beef and Veal**				(1000 MT CWE)(1000 HEAD)		
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Slaughter (Reference)	9720	9720	9380	9435	0	9000	(1000 HEAD)
Beginning Stocks	0	0	0	0	0	0	(1000 MT CWE)
Production	1670	1670	1610	1610	0	1550	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	590	650	650	650	0	700	(1000 MT CWE)
TOTAL Imports	590	650	650	650	0	700	(1000 MT CWE)
TOTAL SUPPLY	2260	2320	2260	2260	0	2250	(1000 MT CWE)
Intra EC Exports	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	5	5	5	5	0	5	(1000 MT CWE)
TOTAL Exports	5	5	5	5	0	5	(1000 MT CWE)
Human Dom. Consumption	2210	2270	2205	2205	0	2200	(1000 MT CWE)
Other Use, Losses	45	45	50	50	0	45	(1000 MT CWE)
TOTAL Dom. Consumption	2255	2315	2255	2255	0	2245	(1000 MT CWE)
Ending Stocks	0	0	0	0	0	0	(1000 MT CWE)
TOTAL DISTRIBUTION	2260	2320	2260	2260	0	2250	(1000 MT CWE)

PSD Table

Country	**Russian Federation**						
Commodity	**Animal Numbers, Swine**				(1000 HEAD)		
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
TOTAL Beginning Stocks	17000	17000	17200	17200	18000	17600	(1000 HEAD)
Sow Beginning Stocks	3300	3300	3340	3340	0	3400	(1000 HEAD)
Production (Pig Crop)	35000	35000	35800	35800	0	36700	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Total Imports	35	35	35	35	0	35	(1000 HEAD)
TOTAL Imports	35	35	35	35	0	35	(1000 HEAD)
TOTAL SUPPLY	52035	52035	53035	53035	18000	54335	(1000 HEAD)
Intra EC Exports	0	0	0	0	0	0	(1000 HEAD)
Total Exports	1	1	1	1	0	1	(1000 HEAD)
TOTAL Exports	1	1	1	1	0	1	(1000 HEAD)
Sow Slaughter	0	0	0	0	0	0	(1000 HEAD)
OTHER SLAUGHTER	30600	30600	30800	31000	0	31900	(1000 HEAD)
Total Slaughter	30600	30600	30800	31000	0	31900	(1000 HEAD)
Loss	4234	4234	4234	4434	0	4434	(1000 HEAD)
Ending Inventories	17200	17200	18000	17600	0	18000	(1000 HEAD)
TOTAL DISTRIBUTION	52035	52035	53035	53035	0	54335	(1000 HEAD)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 HEAD)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 HEAD)

PSD Table

Country	**Russian Federation**						
Commodity	**Meat, Swine**				(1000 MT CWE)(1000 HEAD)		
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Slaughter (Reference)	30600	30600	30800	31000	0	31900	(1000 HEAD)
Beginning Stocks	0	0	0	0	0	0	(1000 MT CWE)
Production	1710	1710	1760	1740	0	1790	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	600	620	560	500	0	500	(1000 MT CWE)
TOTAL Imports	600	620	560	500	0	500	(1000 MT CWE)
TOTAL SUPPLY	2310	2330	2320	2240	0	2290	(1000 MT CWE)
Intra EC Exports	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	1	1	1	1	0	1	(1000 MT CWE)
TOTAL Exports	1	1	1	1	0	1	(1000 MT CWE)
Human Dom. Consumption	2225	2245	2235	2179	0	2224	(1000 MT CWE)
Other Use, Losses	84	84	84	60	0	65	(1000 MT CWE)
TOTAL Dom. Consumption	2309	2329	2319	2239	0	2289	(1000 MT CWE)
Ending Stocks	0	0	0	0	0	0	(1000 MT CWE)
TOTAL DISTRIBUTION	2310	2330	2320	2240	0	2290	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)

Russian Beef Imports

	Quantity (MT)	1999	2000	2001	2002	2003	2003 Jan.	Feb.	Mar	Apr	May	YTD
0202	BEEF, FROZEN	522,029	270,714	420,844	469,141	495,031	10,313	10,111	30,935	35,825	40,437	127,620
020230	CUTS BONELESS	198,142	104,399	232,297	325,928	387,030	8,763	6,918	26,584	31,364	36,444	110,074
020210	CARCASS,WHOLE/HALF	139,406	121,714	73,265	96,397	95,827	1,357	2,938	4,351	4,460	3,990	17,096
020220	CUTS WITH BONE	184,481	44,601	115,283	46,816	12,174	192	255	0	0	3	450
0201	BEEF FRESH, CHILLED	9,360	11,449	34,671	35,459	10,015	0	423	1,186	1,874	1,473	4,956
020130	CUTS BONELESS	125	88	12,094	34,212	9,891	0	405	1,185	1,872	1,454	4,916
020120	CUTS WITH BONE	9,123	11,321	22,525	1,229	124	0	18	1	2	19	40
020110	CARCASS,WHOLE/HALF	111	40	53	18	0	0	0	0	0	0	0

	Value (Million USD)	1999	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
0202	BEEF, FROZEN	845	338	468	540	602	13	15	41	49	55	173
020230	CUTS BONELESS	356	143	245	369	465	11	10	33	41	48	142
020210	CARCASS,WHOLE/HALF	283	149	111	127	125	2	5	8	8	7	31
020220	CUTS WITH BONE	207	46	112	44	12	0	0	0	0	0	0
0201	BEEF FRESH, CHILLED	19	12	42	49	14	0	1	2	3	2	7
020130	CUTS BONELESS	0	0	17	48	13	0	1	2	3	2	7
020120	CUTS WITH BONE	18	12	25	2	0	0	0	0	0	0	0
020110	CARCASS,WHOLE/HALF	0	0	0	0	0	0	0	0	0	0	0

0202	BEEF, FROZEN Qty. (MT)	1999	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
	1 Brazil	0	0	1,912	27,087	90,503	4,502	1,739	6,407	3,762	10,378	26,787
	2 Ukraine	137,534	135,426	90,161	128,578	144,904	1,732	4,453	6,682	7,552	7,195	27,614
	3 Argentina	898	4,985	1,662	0	22,020	367	795	2,093	1,432	4,552	9,239
	4 Spain	15,630	6,296	29,139	32,113	42,516	361	442	3,797	4,393	3,706	12,699
	5 Italy	16,158	8,506	25,026	23,157	21,456	153	41	1,356	3,078	3,204	7,831
0201	BEEF FRESH, CHILLED Qty. (MT)											
	1 Germany	1,067	3,731	27,658	32,189	9,229	0	404	1,109	1,656	1,379	4,548
	2 Netherlands	390	28	296	272	316	0	0	38	97	32	167
	3 Denmark	6,761	7,159	5,782	1,474	88	0	0	0	19	19	38
	4 Poland	107	339	53	656	40	0	0	36	40	19	94
	5 Lithuania	137	101	0	15	9	0	18	0	0	18	36

0202	Mkt. Share (% of Qty.)	1999	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
	1 Brazil	0.0%	0.0%	0.5%	5.8%	18.3%	43.7%	17.2%	20.7%	10.5%	25.7%	21.0%
	2 Ukraine	26.3%	50.0%	21.4%	27.4%	29.3%	16.8%	44.0%	21.6%	21.1%	17.8%	21.6%
	3 Argentina	0.2%	1.8%	0.4%	0.0%	4.4%	3.6%	7.9%	6.8%	4.0%	11.3%	7.2%
0201												
	1 Germany	11.4%	32.6%	79.8%	90.8%	92.2%	0.0%	95.6%	93.5%	88.4%	93.6%	91.8%
	2 Netherlands	4.2%	0.2%	0.9%	0.8%	3.2%	0.0%	0.0%	3.2%	5.2%	2.2%	3.4%
	3 Denmark	72.2%	62.5%	16.7%	4.2%	0.9%	0.0%	0.0%	0.0%	1.0%	1.3%	0.8%

Source: World Trade Atlas, Customs Committee of Russia

Russian Pork Imports

	Quantity (MT)	2000	2001	2002	2003	2004 Jan.	Feb.	Mar	Apr	May	YTD
0203	PORK,FRESH OR FROZEN	212,759	367,998	602,010	533,871	17,654	14,212	40,723	44,077	38,225	154,892
020321	FROZEN CARCASSES	87,372	183,357	301,929	266,729	9,651	5,740	20,427	26,310	26,485	88,615
020329	FROZEN CUT BONELESS	72,314	138,028	238,026	228,899	7,690	7,699	16,366	11,681	8,880	52,317
020311	FRESH CARCASSES	46,159	41,277	55,756	29,632	294	614	3,550	4,946	2,365	11,768
020322	FROZEN CUTS+BONES	5,563	3,282	4,856	6,786	20	120	261	1,005	377	1,782
020319	FRESH CUTS BONELESS	953	1,694	1,358	1,805	0	39	119	135	118	410
020312	FRESH CUTS+BONES	398	359	85	20	0	0	0	0	0	0

	Value (Million USD)	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
0203	PORK,FRESH OR FROZEN	212	322	672	651	24	17	51	58	54	204
020321	FROZEN CARCASSES	86	160	366	369	15	8	29	38	19	109
020329	FROZEN CUT BONELESS	72	123	239	237	8	8	17	13	11	58
020311	FRESH CARCASSES	44	32	59	34	0	1	4	6	1	13
020322	FROZEN CUTS+BONES	8	5	7	8	0	0	0	1	1	3
020319	FRESH CUTS BONELESS	1	1	2	3	0	0	0	0	0	1
020312	FRESH CUTS+BONES	0	0	0	0	0	0	0	0	0	0

0203	**PORK,FR./FR. Qty. (MT)**	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
1	Brazil	14,562	140,766	349,799	312,693	15,475	4,047	18,282	21,356	27,773	86,931
2	China	1,482	10,347	67,519	43,757	432	374	1,251	3,194	3,065	8,316
3	Denmark	34,766	55,479	41,437	20,440	97	887	3,063	2,616	1,735	8,396
4	United States	29,660	31,983	16,018	2,734	173	52	659	1,854	869	3,606
5	Germany	22,395	25,637	29,652	16,351	47	611	1,572	2,066	708	5,005
6	Ukraine	12,206	1,504	1,069	12,180	495	1,716	1,547	651	573	4,982
7	Italy	2,464	741	1,459	625	0	0	21	64	541	626
8	Ireland	1,949	3,821	5,581	3,208	56	100	286	742	521	1,705
9	France	26,670	15,675	16,301	8,111	0	587	1,703	1,918	500	4,707
10	Poland	20,506	22,042	17,153	78,466	850	5,007	9,086	4,785	447	20,175

0203	**Mkt. Share (% of Qty.)**	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
1	Brazil	6.8%	38.3%	58.1%	58.6%	87.7%	28.5%	44.9%	48.5%	72.7%	56.1%
2	China	0.7%	2.8%	11.2%	8.2%	2.4%	2.6%	3.1%	7.2%	8.0%	5.4%
3	Denmark	16.3%	15.1%	6.9%	3.8%	0.5%	6.2%	7.5%	5.9%	4.5%	5.4%
4	United States	13.9%	8.7%	2.7%	0.5%	1.0%	0.4%	1.6%	4.2%	2.3%	2.3%
5	Germany	10.5%	7.0%	4.9%	3.1%	0.3%	4.3%	3.9%	4.7%	1.9%	3.2%
6	Ukraine	5.7%	0.4%	0.2%	2.3%	2.8%	12.1%	3.8%	1.5%	1.5%	3.2%
7	Italy	1.2%	0.2%	0.2%	0.1%	0.0%	0.0%	0.1%	0.1%	1.4%	0.4%
8	Ireland	0.9%	1.0%	0.9%	0.6%	0.3%	0.7%	0.7%	1.7%	1.4%	1.1%
9	France	12.5%	4.3%	2.7%	1.5%	0.0%	4.1%	4.2%	4.4%	1.3%	3.0%
10	Poland	9.6%	6.0%	2.8%	14.7%	4.8%	35.2%	22.3%	10.9%	1.2%	13.0%

Source: World Trade Atlas, Customs Committee of Russia

Russian Imports of Offals

	Quantity (MT)	1999	2000	2001	2002	2003	2004 Jan.	Feb.	Mar	Apr	May	YTD
0206	0206 EDIBLE ANIMAL OFFAL	70,335	97,277	175,271	216,144	219,484	8,932	15,766	15,805	16,895	14,267	71,666
020622	FROZEN BOVINE LIVER	31,705	35,685	68,790	92,196	82,551	3,122	1,273	1,160	2,508	2,735	10,798
020641	FROZEN SWINE LIVER	9,212	14,802	23,603	26,861	28,599	1,261	3,519	3,872	3,351	2,568	14,571
020649	FROZEN SWINE OTHER	18,863	36,721	69,366	83,446	93,334	3,819	9,969	9,538	9,976	7,925	41,228
020629	FROZEN OTHER BOVINE	9,039	8,657	12,146	12,518	13,268	579	633	1,006	810	838	3,867

	Value (Million USD)	1999	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
0206	0206 EDIBLE ANIMAL OFFAL	46	46	84	112	120	5	9	9	10	8	40
020622	FROZEN BOVINE LIVER	23	16	33	25	47	2	1	1	1	2	6
020641	FROZEN SWINE LIVER	5	7	11	6	14	1	2	2	2	1	7
020649	FROZEN SWINE OTHER	10	16	33	17	48	2	6	5	6	4	23
020629	FROZEN OTHER BOVINE	6	4	6	3	9	0	0	1	1	1	3

020622	**FROZEN BOVINE LIVER**	1999	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
1	Denmark	540	1,069	1,607	1,712	1,576	29	135	86	386	713	1,349
2	Australia	1,904	2,195	5,794	5,988	5,536	524	340	364	572	612	2,412
3	France	64	563	23	24	566	47	322	270	949	425	2,014
020641	**FROZEN SWINE LIVER**											
1	Brazil	0	18	2,163	4,404	4,525	246	305	541	430	493	2,015
2	Germany	132	456	1,773	1,250	1,562	110	408	687	700	492	2,397
3	Denmark	4,472	4,270	8,914	10,894	8,706	420	1,284	819	374	427	3,323
020649	**FROZEN SWINE OTHER**											
1	Germany	3,037	6,974	17,387	23,842	23,754	683	2,675	2,850	3,037	2,367	11,612
2	France	2,811	6,351	8,202	11,669	11,318	645	1,337	877	1,242	1,208	5,309
3	Denmark	3,973	9,212	14,673	18,469	17,101	419	2,150	1,377	1,352	1,159	6,457

	Mkt. Share (% of Qty.)	1999	2000	2001	2002	2003	Jan.	Feb.	Mar	Apr	May	YTD
020622	**FROZEN BOVINE LIVER**											
1	Denmark	1.7%	3.0%	2.3%	1.9%	1.9%	0.9%	10.6%	7.4%	15.4%	26.1%	12.5%
2	Australia	6.0%	6.2%	8.4%	6.5%	6.7%	16.8%	26.7%	31.4%	22.8%	22.4%	22.3%
3	France	0.2%	1.6%	0.0%	0.0%	0.7%	1.5%	25.3%	23.3%	37.8%	15.5%	18.6%
020641	FROZEN SWINE LIVER											
1	Brazil	0.0%	0.1%	9.2%	16.4%	15.8%	19.6%	8.7%	14.0%	12.8%	19.2%	13.8%
2	Germany	1.4%	3.1%	7.5%	4.7%	5.5%	8.7%	11.6%	17.7%	20.9%	19.2%	16.5%
3	Denmark	48.6%	28.9%	37.8%	40.6%	30.4%	33.3%	36.5%	21.2%	11.1%	16.6%	22.8%
020649	FROZEN SWINE OTHER											
1	Germany	16.1%	19.0%	25.1%	28.6%	25.5%	17.9%	26.8%	29.9%	30.4%	29.9%	28.2%
2	France	14.9%	17.3%	11.8%	14.0%	12.1%	16.9%	13.4%	9.2%	12.5%	15.2%	12.9%
3	Denmark	21.1%	25.1%	21.2%	22.1%	18.3%	11.0%	21.6%	14.4%	13.5%	14.6%	15.7%

Source: World Trade Atlas, Customs Committee of Russia