

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Required Report - public distribution

Date: 2/12/2016

GAIN Report Number: RS1606

Russian Federation

Poultry and Products Annual

2016 Poultry and Products Semi-Annual Report

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Report Highlights:

FAS Moscow forecasts 2016 broiler production to reach 3.70 million metric tons (MMT), or 4 percent growth year-on-year. Domestic producers continue expansion at a slower pace compared to 9 percent in 2015. Broiler meat consumption is expected to be 3.76 MMT, a minor 0.4 percent growth from 2015. Growing production costs and price sensitive consumer demand continue to impact margins; sector consolidation and competition between producers may intensify. The weak ruble, restrictive trade policies, and competitive domestic products in 2016 could halve imports to 130,000 MT from 260,000 MT in 2015. Poultry exports to traditional EAEU and new markets in 2016 may grow to 70, 000 MT.

General Information

NOTE: USDA unofficial data excludes Crimean production and exports. However, as of June 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.

Executive Summary:

FAS/Moscow forecasts broiler production to grow by four percent to 3.7 million metric tons (MMT) in 2016 due to continued production expansion by leading producers and stable demand for broiler meat. The 2015 broiler meat production estimate is 3.55 MMT. There are indications of saturation of the Russian broiler meat market, such as wholesale and consumer price decreases, especially when compared to the inflation levels and price growth for other food items¹. However, despite the growing production and intensified competition among local producers, the risk of market over-saturation in 2016 has decreased because several expansion projects were put on hold due to the increased cost of borrowed capital, growing operational expenses and declining margins.

FAS /Moscow forecasts broiler meat consumption in 2016 at 3.760 MMT, minor 0.4 percent increase compared to 2015, when domestic consumption grew by 2.2 percent to 3.745 MMT. A growing number of Russian consumers respond to the on-going economic crisis by economizing on food purchases, and the demand for broiler meat remains stable given its competitive price when compared with other meat products. Broiler meat prices are not expected to increase in 2016, so poultry will most likely remain the meat of choice both for struggling Russian households and for the meat processing industry.

Trends in other meat markets, primarily turkey and pork, influence the consumer demand for broiler meat. The Ministry of Agriculture reported 34.9 percent annual growth in turkey production in 2015, to 205,000 MT (live weight). Turkey competes with other meats for its share of declining meat consumption, and the growing popularity of turkey constrains stronger growth in demand for broiler meat in 2016. In addition, the average price in Russia for pork half-carcasses dropped by 32.7 percent to 2.03 USD/kg between January and December in 2015². Further decline in pork prices may result in some shift in demand from poultry back to pork, particularly in the meat processing industry.

Local products continue to replace imports – FAS/Moscow forecasts 130,000 MT of broiler meat shipments in 2016, which is a 50 percent decline from 260,000 MT of broiler meat imported in 2015. Poultry meat imports are expected to drop due to the reduced value of the ruble³, anticipated growth of domestic production, and the closure of the market to many trading partners due to both political and SPS reasons.

¹ According to Rosstat the Consumer Price Index in 2015 was 12.9 percent, and Food Price Index was 14 percent, while the Russian Ministry of Agriculture (www.specagro.ru) reports the average consumer price for broiler carcass (in rubles) decreased by 5 percent between January 2015 and January 2016.

² Source: Market Research Agency “EMEAT”. Unlike the poultry market, pork prices in Russia are sensitive to changes in world prices.

³ Official Rub to Dollar Exchange rate peaked on January 22, 2016 at 83.59 Rub per USD; compare to 56.23 Rub per USD on January 1, 2015

FAS/Moscow forecasts 2016 broiler meat exports to reach 70,000 MT. While the Eurasian Economic Union (EAEU) markets (namely Kazakhstan and Kyrgyz Republic) will likely remain the major destination for Russian broiler meat, Russian producers have received access to new markets in Middle East and further exports to new markets may increase in 2016. However, sanitary issues may impede these exports.

Broiler Production

Table 1. Russia: Broiler Production, Supply and Demand, 1,000 MT (ready-to-cook)

Poultry, Meat, Broiler Market Begin Year	2014		2015		2016	
	Jan 2014		Jan 2015		Jan 2016	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Russia						
Production	3,260	3,260	3,550	3,550	3,650	3,700
Total Imports	460	460	260	260	130	130
Total Supply	3,720	3,720	3,810	3,810	3,780	3,830
Total Exports	44	50	35	65	45	70
Human Consumption	3,676	3,670	3,775	3,745	3,735	3,760
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	3,676	3,670	3,775	3,745	3,735	3,760
Total Use	3,720	3,720	3,810	3,810	3,780	3,830
Ending Stocks	0	0	0	0	0	0
Total Distribution	3,720	3,720	3,810	3,810	3,780	3,830

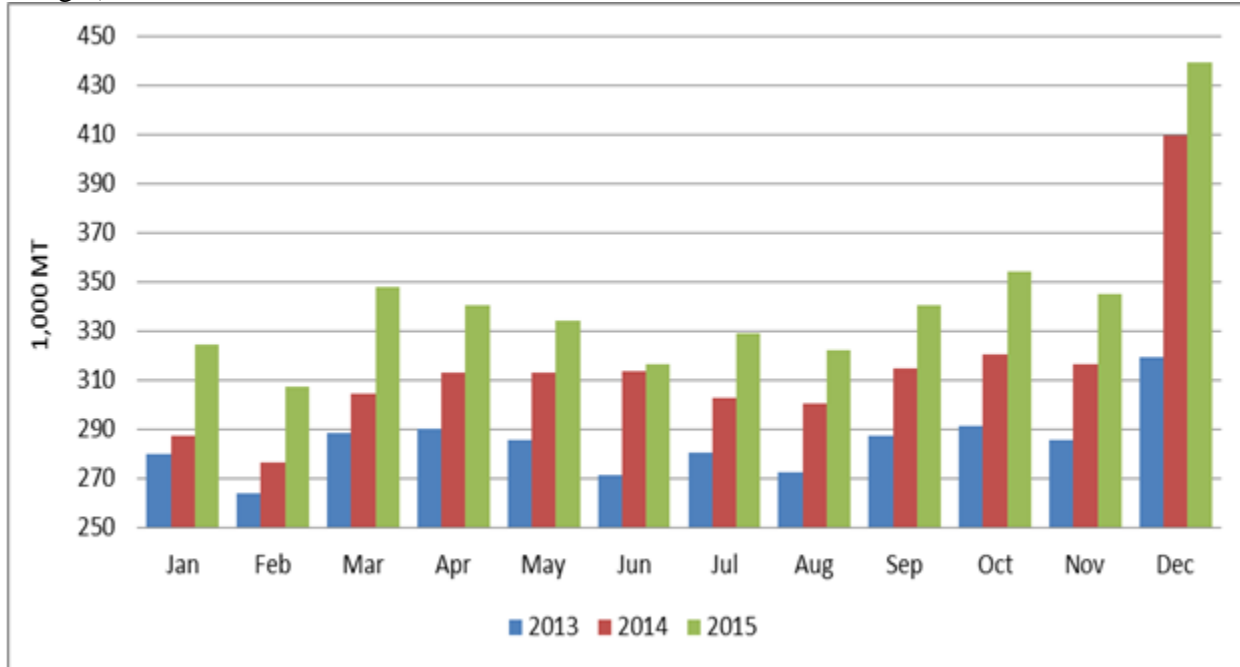
(MIL HEAD) ,(1000 MT)

NOTE: Not Official USDA Data.

Official USDA data is available at <http://apps.fas.usda.gov/psdonline>

FAS/Moscow forecasts broiler meat production to reach 3.70 MMT in 2016, which is 145,000 MT or four percent growth year-on-year. The pace of production growth is anticipated to slow compared to an almost nine percent annual increase in 2015. In 2015 poultry producers experienced downward pressure on margins due to accelerated inflation and the ruble's depreciation, which had a direct impact on production costs. Margins in the poultry sector are expected to further decrease in 2016. Producers' expenses for genetics, equipment, feed additives, veterinary drugs, vaccines, transportation and utilities have been growing. At the same time, opportunities for sales price increases are limited; elasticity of demand for poultry has increased during the crisis as purchasing power of consumers weakened.

Chart 1. Russia: Monthly Poultry Production at Agricultural Establishments (1,000 MT; Slaughter Weight) in 2013-2015



Source : Rosstat

Demand for poultry (as well as other meat products) usually declines during the Orthodox fasting in March and April, grows during barbeque season in May, remains stable in summer months, and, finally, peaks before the New Year holidays. Leading companies, which have modernized poultry plants and have their own feed production units, earn better than average margins⁴. These producers have some flexibility in choosing pricing strategies and can sell their products at lower prices than can smaller companies. Major players reacted to changes in consumer demand and implemented pricing policies aimed at selling the excess stocks in 2015. Thus, the largest companies caused repeated short-term wholesale price fluctuations in 2015, and their influence will grow in 2016.

Industry experts expect the consolidation process in the poultry industry to intensify in the second half of 2016. Large producers may consider buying smaller companies struggling with low poultry prices. Major companies that previously focused exclusively on crop production may begin to purchase poultry production businesses. The Central Bank of Russia (CBR) expects a gradual improvement of the financial state of domestic producers in the second half of 2016; however, in January 2016 CBR kept the key rate at 11 percent after a month in which ruble dropped to a record lows (83.59 Rub per USD on 22 January, 2016), and interest rates for ruble loans remain at record high levels (26-28 percent). If the economic situation further deteriorates, less efficient producers are more likely to go bankrupt as potential buyers experience difficulties with borrowing funds for closing mergers and acquisitions deals⁵.

⁴ Rospitisesouz (Russian Poultry Union) informs that profitable companies account for 91.5% of total poultry meat production in 2015; production expenses per kg varied from 69.75 rubles to 100 rubles; while the highest margins in broiler sector were 21.1%, most broiler producers earned between 10.2 to 12.2%

⁵ As one possible example, Rusagro cancelled its acquisition of Uralbroiler. Rusagro is one of the largest agricultural holdings in Russia <http://www.rusagroup.ru/about-us/>. “Uralbroiler” Ltd. <http://www.uralbroiler.ru/> is a large meat

Earlier in 2015, the Ministry of Agriculture has published a list of 65 projects totaling 64.9 billion rubles (approximately 1.1 billion USD) investment in additional poultry production in 2015-2016, which could increase production capacity as much as 455,000 MT (live weight) in that time. In 2016 several industry leaders, including “GAP Recourse” (in Tambov Region), “Miratorg” (in Bryansk), and “Produkty Pitania” (in Kaliningrad), confirmed that they will continue investment projects and expand broiler meat production in 2016. At the same time, the risk of market over-saturation has decreased because some broiler expansion projects were put on hold or cancelled due to financial reasons.

In 2015, the Ministry of Agriculture extended poultry production support programs. Subsidies for partial compensation of interest for investment and short-term loans remain the primary support measures for the poultry industry. The Ministry of Agriculture also intends to continue its breeding stock development support program by reimbursement direct expenses for the construction and modernization of breeding centers. The federal budget allocated 237 billion rubles for support of agricultural producers in 2016, the same amount as in 2015. However, it is unclear if the Government of Russia (GOR) will have the budget to implement these support plans.

The sharp fall in the price of oil has forced the Russian government to consider steep spending cuts, as the current budget is based on projected revenues from oil exports at a price of \$50 per barrel, while Benchmark Brent crude slid below \$30 per barrel already by mid-January 2016. The GOR abandoned three-year budgeting and adopted a budget for only 2016 because of current market volatility.

The Ministry of Agriculture drafted Amendments to the State Program of Development of Agriculture. According to the draft Amendments⁶, total federal budget spending for agriculture may be cut by 10 percent to 215 billion Rubles in 2016. The budget cut may impact the volume of subsidies for poultry producers because the Ministry suggested the reduction of funds for the sub-program of livestock and poultry sectors development⁷ from 40 billion rubles to 34.3 billion rubles. The draft Amendments also revise strategic meat and poultry production goals from current 14.45 MMT to 14.40 MMT of total meat production in 2020.

Feed grain crops will most likely remain a positive factor in poultry industry performance in 2016. FAS/Moscow improved its forecasted total grain crop for next year to 103 MMT based on Rosstat’s recent preliminary crop production data (see [RS1601 Grain and Feed January 2016 Update](#)). At the same time, prices for forage grains increased by 150-400 rubles (2-5.3 USD⁸) per MT in January 2016 due to continued depreciation of ruble. Instability of the ruble to dollar exchange rate is expected to continue throughout 2016. However, industry experts believe that GOR will continue its export policy aimed at reducing the negative effects of ruble volatility and keeping domestic feed prices at low levels.

producer in the Ural Federal District with poultry production capacity of about 110,000 MT and ambitious expansion plans. In the beginning of December 2015 Rusagro (LSE:AGRO) became the owner of minority stakes of “Uralbroiler Group of Companies” and planned to become a major owner of the meat production company. However, on December 24, 2015, the contract was terminated and all purchased assets are returned to the seller, as the companies were unable to agree on the final terms of the transaction.

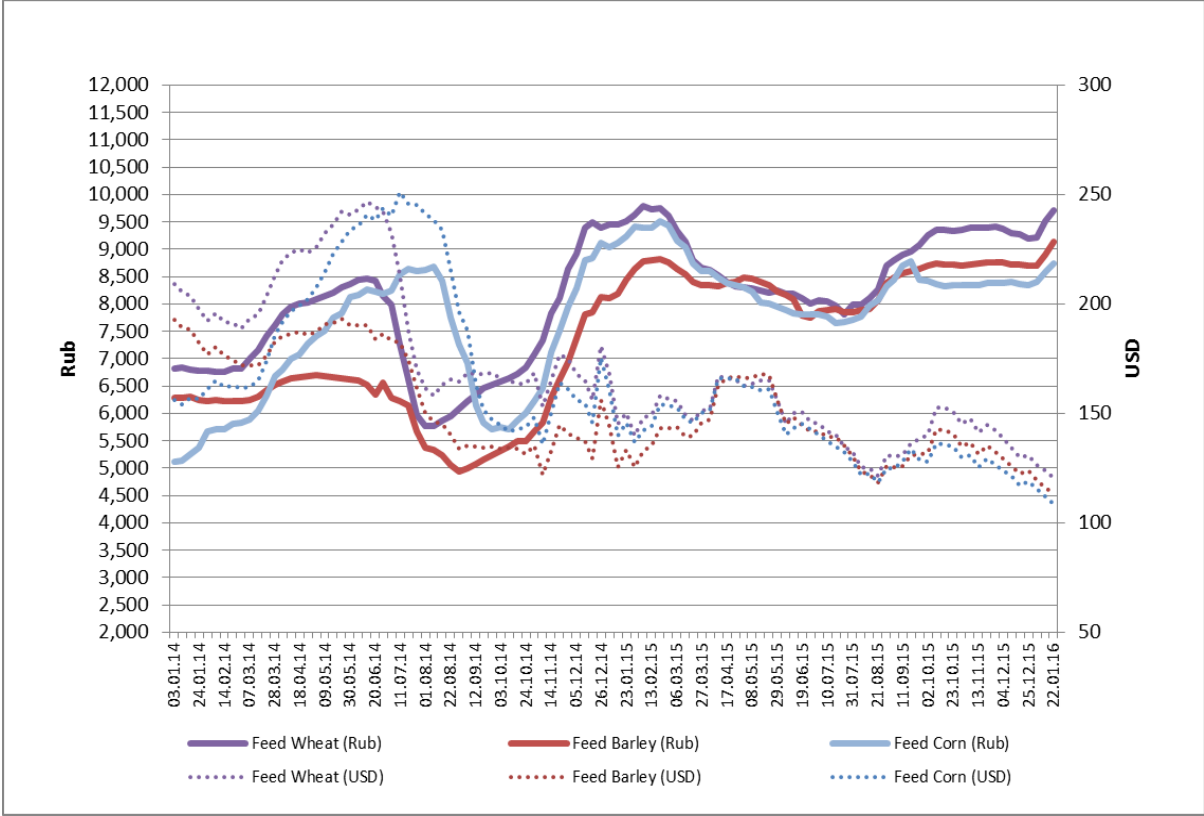
⁶ published at <http://regulation.gov.ru/projects#npa=45790> on February 2, 2016

⁷ The budget cut won’t affect the beef cattle sector because it is covered by a different sub-program.

⁸ 1 USD = 75.17 Rubles, the official exchange rate defined by [Central Bank of Russia](#) for January 30, 2016. http://www.cbr.ru/currency_base/daily.aspx?date_req=30.01.2016

GOR initially enacted wheat export tariffs in February 2015, but later replaced them with a floating export duty on wheat in July 2015 and amended the export duty in October 2015 ([RS1577 Wheat Export Duty Amended](#)). This policy resulted in stabilization of feed prices and contributed to positive poultry (and pork) production dynamics in 2015.

Chart 2: Russia: Feed Grain Prices in Rubles and US Dollars (European Russia, EXW, MT) 2014 - January 2016



Source: Pro Zerno

Further consolidation in the sector increases biological risks. According to Rosptitzesouz (Russian Union of Poultry Producers), 10 companies account for 40 percent of the Russian broiler meat market production. The lion’s share of poultry is produced in 10 regions. As a result, outbreaks of avian diseases in the regions where large commercial poultry operations are located could impact the current production forecast. According to information on the official web site of the Federal Service of Veterinary and Phytosanitary Surveillance (Rosselkhoznadzor), cases of Highly Pathogenic Avian Influenza were registered in four Russian regions in 2015: Astrakhan, Tyva, Novosibirsk oblast and Zabaikalsky Krai⁹. However, all cases were in wild birds only.

⁹ <http://www.fsvps.ru/fsvps-docs/ru/iac/flu/2015/12-31/03.pdf>

Consumption

FAS/Moscow forecasts 3.760 MMT 2016 broiler meat consumption, which is minor 0.4 percent increase compared to 2015 broiler meat consumption estimate of 3.745 MMT (2.2 percent growth in 2015).

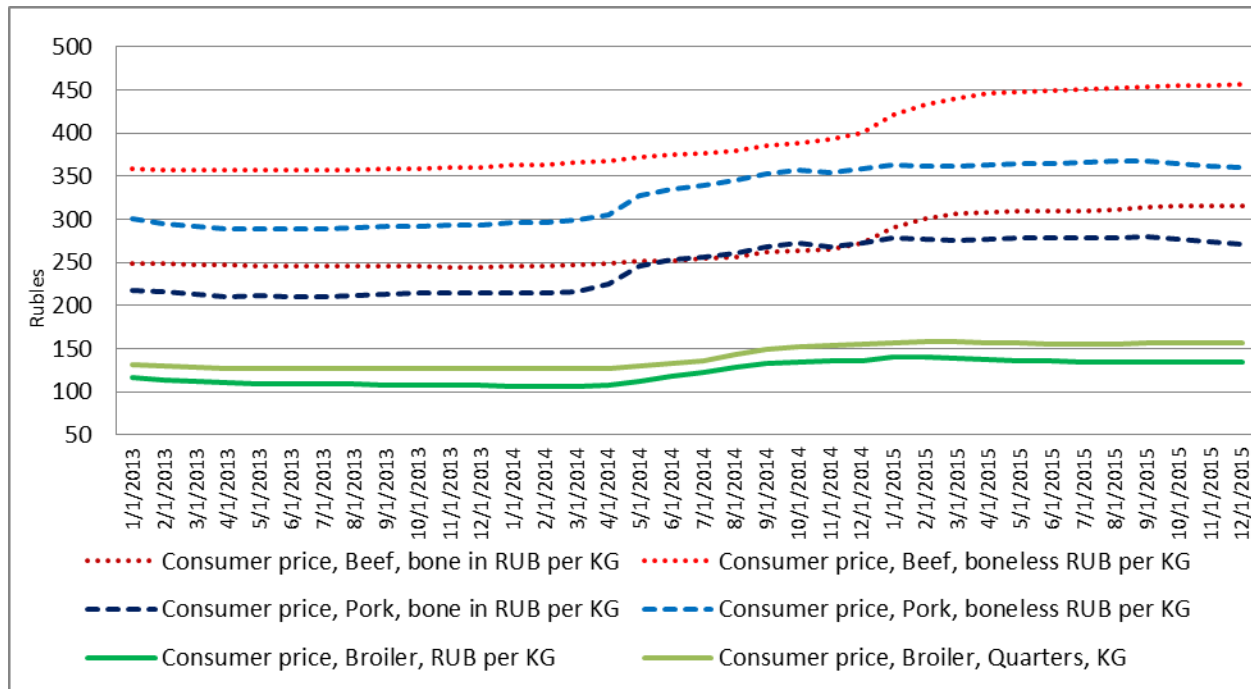
According to ROSSTAT, Russian gross domestic product (GDP) declined 3.7 percent, retail turnover dropped by 10 percent, and real disposable income declined by 4 percent in 2015. The Central Bank of Russia expects continued GDP decline in 2016 between -0.5 and -1.0 percent. Multiple research polls indicate that more Russian consumers have to economize on food purchases. For example, a recent Russian Public Opinion Research Center (VCIOM) poll¹⁰ showed that 34 percent of respondents started to buy cheaper goods in December 2015 (vs 22 percent in January 2015). Further, 18 percent of respondents claimed to have been buying cheaper goods for six months.

Meat consumption trends reflect changes in consumers' behavior resulting from reduction of disposable incomes. Consumption of beef in 2015 dropped significantly – sources vary the degree of change from 10 to 14 percent – and further decline in 2016 is anticipated. Consumer demand shifted from beef to more affordable sources of proteins, primarily poultry meat.

Broiler meat will most likely continue to be the meat of choice for struggling Russian households in 2016, as it remains competitively priced compared to red meats. According to Rosstat, retail prices for whole broilers varied between 140.15 rubles and 133.73 rubles per kilogram in 2015 with a general downward trend. Retail price for chicken leg quarters dropped from 157.1 rubles to 156.9 rubles per kilogram between January and December 2015. This price is very low in comparison to 362-359 rubles per kilogram of boneless pork and 420-456 rubles per kilogram of beef.

¹⁰ <http://www.vciom.com/index.php?id=61&uid=1223>

Chart 3. Russian Monthly Consumer Prices for Poultry, Pork and Beef in 2013-2015 (Rubles per 1 kg)



Source

: Rosstat

Trends in other meat markets, primarily turkey and pork, constrain stronger growth in consumer demand for broiler meat. The Ministry of Agriculture reported 34.9 percent annual growth in turkey production in 2015, to 205,000 MT (live weight). According to the National Meat Association, per capita consumption of turkey in Russia grew from 0.2 kg in 2005 to 1.5 kg in 2015. Several producers are planning to increase turkey production in 2016: “Eurodon” (Rostov Region), “Damate” (Penza Region), “Gafuri Poultry Complex” (Baskortostan), and “Cherkizovo” (Tambov Region). The growing share of turkey in meat consumption will continue impact the demand for broilers in 2016¹¹.

According to the Ministry of Agriculture (www.specagro.ru), pork prices decreased by 3.3 percent between January 2015 and 2016. The market research agency EMEAT estimates ruble price decline for pork half carcasses at 12.9-12.4 percent, reporting dollar pork price decline at 32.7 percent in 2015. If the world trend of low pork prices persists in 2016, some shift in demand from poultry to pork is possible, particularly from meat processors.

¹¹ Market experts name turkey production “the fastest growing sector” and estimate turkey business EBITDA at levels over 30 percent, higher than leading broiler producers report. More reading (in Russian): <http://www.rbc.ru/business/19/01/2016/5698d5539a794797dac13a30>

Trade

FAS/Moscow forecasts 130,000 MT of broiler imports in 2016, which is a 50 percent decrease from the 260,000 MT of imports estimated in 2015. Imports dropped in 2015 by 200,000 compared to the previous year due to growth in domestic production, a weak ruble, and continued market access restrictions placed on foreign suppliers. All three above-mentioned trends will remain in the market in 2016, resulting in a further decrease in imports.

In 2015, the GOR extended a ban on a variety of agricultural products (including poultry, HS code 0207) from the United States, Canada, the European Union, Australia, and Norway until August 6, 2016 ([RS1540 Russian Food Ban Extended Until August 2016](#)). In August 2015 Prime Minister Medvedev also signed a decree that expanded the list of countries that fall under restrictions to include Albania, Montenegro, Iceland and Liechtenstein.

On January 1, 2016, Ukraine implemented the full-scale Deep and Comprehensive Free Trade Agreement (DCFTA); effective the same date, Russia cancelled its FTA with Ukraine and banned imports of a number agricultural products, including poultry¹². In reaction to political tensions, Russia also banned imports of a number of agricultural products including poultry meat from Turkey starting January 1, 2016 ([RFATO030](#)).

Belarus and Brazil will likely remain the top poultry meat suppliers to Russia in 2016. However, price trends and low levels of TRQ utilization indicate that opportunities are limited even for non-restricted exporters because the market is close to saturation with competitively priced domestic products. Only 22.6 percent of poultry Tariff Rate Quotas have been utilized through the end of November 2015. In January 2016 the Russian meat market information agency “EMEAT” reported the following average prices per kg of broiler products (domestic vs imported): chicken quarters 98.4 rubles vs 98.2 rubles; chicken breasts 172.9 rubles vs 171.9 rubles; chicken legs 109.3 rubles vs 109.8 rubles. “EMEAT” also reports that average dollar price for broiler carcass declined in Russia by 23.4 percent between January 2015 and January 2016. Price pressures resulting from exchange rates will remain very important in trade with Russia, and so a drop in value of the Brazilian peso may contribute to higher-than-expected imports from Brazil in the coming year.

The Federal Customs Service of Russia (FCS of Russia) reported that January to October Belarus and Brazil together accounted for approximately 85 percent of all Russian broiler imports. Belarus shipped 111,745 MT of broiler meat to Russia in January-October, 2015, which is a 14 percent increase year-on-year¹³. Brazil reports 90,534 MT broiler meat exports to Russia in 2015, which is 27.54 percent decline year-on-year¹⁴. Other notable suppliers of broiler meat to Russia in January-November of 2015 were Turkey (20,599 MT) and Argentina (7,842 MT). Despite the increase in imports from Belarus and

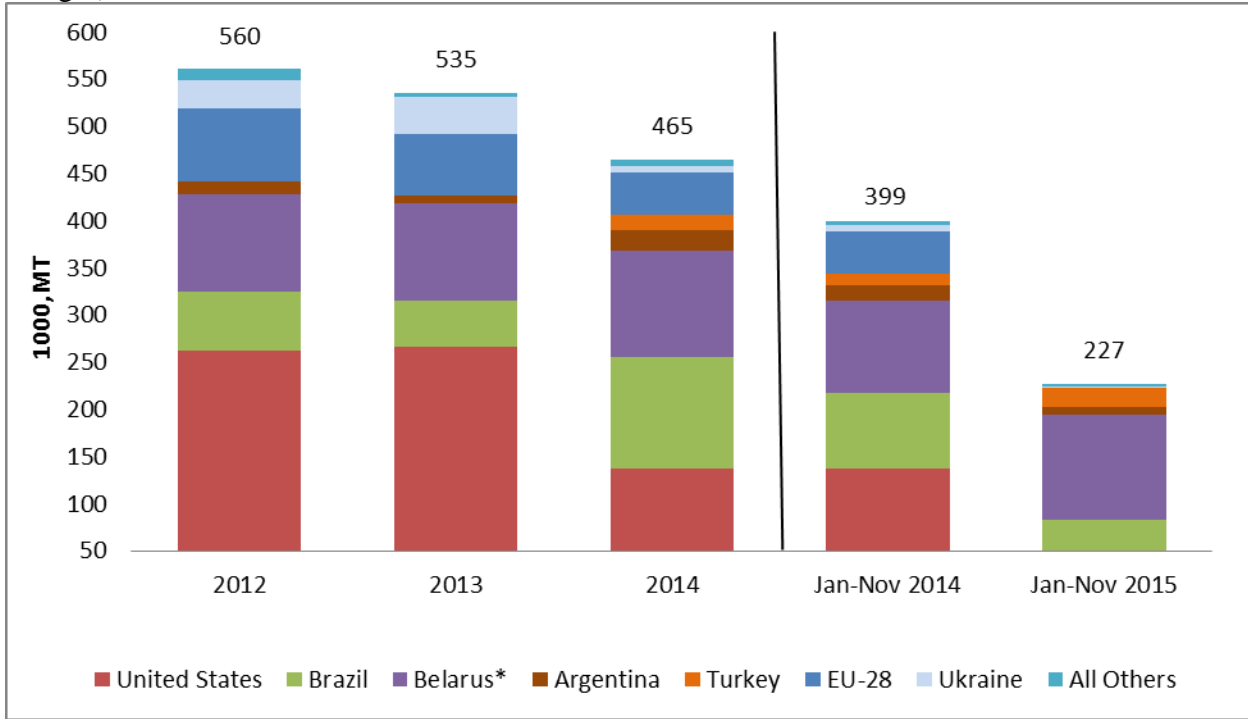
¹² The ban is similar to the trade restrictions imposed on a number of Western countries until August 2016. The list of banned agricultural includes product groups under the following HS Codes: 0201, 0202, 0203, 0207, 0210, 0301, 0302-0308, 0401-0406, 0701-0714, 0801- 0811, 0813, 1601, 190190 and 210690

¹³ Source: Belstat

¹⁴ Source: SECEX – Foreign Trade Secretariat

Turkey¹⁵ in January-November 2015, total broiler imports were approximately 42 percent lower than during the same period in 2014.

CHART 4. Russia: Broiler Meat Imports in 2012-2014 and from Jan-October 2015 (1,000 MT, Product Weight)



Belarus trade data is available for Jan-Oct 2015

Source: Federal Customs Service of Russia, Belstat

FAS/Moscow forecasts 2016 broiler meat exports to reach 70,000 MT. The EAEU market will remain the major destination for broiler exports from Russia in 2016. Russia will continue to increase broiler meat shipments to Kazakhstan, Kyrgyzstan and Armenia, benefiting from trade preferences under EAEU agreements and currency rates, which are favorable for Russian suppliers in comparison with other world exporters.

Russia shipped 31,181 MT of broiler meat, or 48 percent of its total poultry exports, to Kazakhstan in January-November 2015. Broiler meat exports to Kyrgyzstan increased almost five-fold from 1,000 MT in 11 months of 2014 to 5,619 MT in January-November 2015.

FCS of Russia reports a significant increase of broiler meat exports to Ukraine in January-November 2015, to 12,711 MT from just 2 MT shipped in 2014. However, it is unclear if Russia continues active trade in Ukraine in 2016 since on-going political tensions between the countries has led to changes in

¹⁵ Turkey started poultry exports to Russia in August 2014, poultry imports from Turkey banned by Russia effective 01.01.2016

the trade regime¹⁶. Despite this uncertainty, FAS/Moscow expects overall Russian exports to grow slightly due to greater trade with Africa and the Middle East.

The leading Russian broiler meat producers intensified market expansion activities focusing on the Middle East and African countries in 2015. Several leading companies have registered “halal” brands targeted for Middle Eastern markets. GOR supported business initiatives aimed at export development. The Ministry of Agriculture launched an intergovernmental working group that focuses on support measures and coordinates efforts to expand agricultural exports. The Russian veterinary and phytosanitary surveillance service “Rosselkhoznadzor” has shifted its priority from finding new suppliers of meat products to the country to activities to open new markets for Russian producers. In September 2015 the Russian Ministry of Economic Development (MED) signed an agreement with the leading meat producer “Miratorg” to coordinate actions proactively to develop export market potential.

Joint efforts of the business community and authorities have brought some results; for example, nine Russian poultry plants as of February 2016 have received the right to ship poultry to United Arab Emirates. There is also progress in opening the Iranian market for Russian meat: Iranian authorities approved “Miratorg” for beef shipment, which is a positive sign for potential poultry meat exporters. Industry experts believe that Russia can annually supply 20,000–30,000 MT of “halal” broiler meat to the Middle East in 2016-2017.

At the same time, Russian exporters were not fully able to benefit from the potential the weak ruble promised in the Asian markets because other key exporters offered better prices. Thus, as reported by FCS of Russia, broiler exports to Hong-Kong dropped by 78 percent from 22,819 MT to 4,921 MT in January-November 2015. Exports to Thailand and Vietnam also declined by approximately 1,000 MT (minus 72 percent year-on-year) and 2,300 MT (minus 44 percent year-on-year) respectively.

Even with the reduction of exports to Asia and other markets, the increase in exports to the Middle East and EAEU countries is likely to result in a moderate increase in total export numbers. However, there are reports that Russian poultry producers are facing sanitary issues in exporting to Asia and the Middle East.

¹⁶ Important Note: State Customs Committee of the Ukraine reports only 20 MT of broiler imports from Russia in January-November 2015, which may be related to the fact that most of broiler exports from Russia are destined to those eastern regions of Ukraine, which have not reported trade data to Kyiv in 2015.

Production Tables

Table 2. Russia: Poultry Production by Region, 1,000 MT, Live Weight

Regions	January – December 2014	January – December 2015	Ratio of 2015 to 2014
RUSSIAN FEDERATION*	4992.8	5435.8	108.8
CENTRAL DISTRICT	1863.3	2071.4	111.2
Belgorod region	761.2	821.9	108.0
Bryansk region	151.6	216.5	142.8
Vladimir region	26.5	27.2	102.6
Voronezh region	107.1	111.7	104.3
Ivanovo region	7.4	18.7	252.8
Kaluga region	63.6	63.1	99.2
Kostroma region	7.5	7.0	93.6
Kursk region	130.3	138.6	106.4
Lipetsk region	144.9	174.8	120.6
Moscow region	167.0	177.6	106.3
Orel region	13.4	18.5	137.9
Ryazan region	3.9	4.6	119.2
Smolensk region	0.9	0.4	45.8
Tambov region	120.7	124.2	102.9
Tver region	53.0	59.8	112.8
Tula region	49.8	49.6	99.6
Yaroslavl region	54.3	57.1	105.1
Moscow	0.103	0.091	87.9
NORTHWEST DISTRICT	477.5	501.7	105.1
The Republic of Karelia	6.8	6.3	93.1
The Republic of Komi	19.1	19.9	104.0
Arkhangelsk region	27.6	6.1	22.2
Arkhangelsk region (excluding Nenets Autonomous District)	27.6	6.1	22.2
Vologda region	12.6	12.2	96.3
Kaliningrad region	22.4	25.7	114.9
Leningrad Region	296.7	298.7	100.7
Murmansk region	5.1	2.4	47.5
Novgorod region	82.0	108.0	131.6
Pskov region	5.2	22.5	432.5
SOUTHERN DISTRICT	421.7	437.5	103.7
The Republic of Adygea	38.3	36.7	95.8
The Republic of Kalmykia	0.00	0.00	
Krasnodar Krai	205.7	214.5	104.2
Astrakhan region	6.3	7.2	115.2
Volgograd region	72.3	70.6	97.8

Rostov region	99.1	108.5	109.4
NORTH-CAUCASIAN FEDERAL DISTRICT	273.2	309.2	113.2
The Republic of Dagestan	23.2	24.3	104.9
The Republic of Ingushetia			
Kabardino-Balkaria	21.5	26.0	121.2
Karachay-Cherkessia	13.8	14.1	102.6
Republic of North Ossetia-Alania	17.0	4.6	27.0
The Chechen Republic	0.9	0.7	75.3
Stavropol Krai	196.8	239.4	121.6
THE VOLGA FEDERAL DISTRICT	978.8	1122.2	114.6
The Republic of Bashkortostan	68.8	51.8	75.3
The Republic of Mari El	150.8	209.0	138.5
The Republic of Mordovia	131.6	171.9	130.6
The Republic of Tatarstan	163.9	174.8	106.7
Udmurt Republic	42.8	43.1	100.7
Chuvash Republic	34.2	51.9	151.6
Perm Krai	47.0	48.3	102.6
Kirov region	4.4	2.5	56.3
Nizhny Novgorod region	61.7	63.9	103.6
Orenburg region	42.2	43.2	102.2
Penza region	149.2	181.8	121.8
Samara region	47.5	51.4	108.3
Saratov region	27.6	27.0	97.9
Ulyanovsk region	7.0	1.6	23.1
URAL FEDERAL DISTRICT	509.7	533.2	104.6
Kurgan region	11.0	11.9	108.1
Sverdlovsk region	130.0	131.3	101.0
Tyumen region (including Khanty-Mansi Autonomous District Yugra and Yamal-Nenets Autonomous District)Tyumen Region	44.9	44.7	99.4
Chelyabinsk region	323.7	345.4	106.7
SIBERIAN FEDERAL DISTRICT	399.8	402.2	100.6
Altai Republic	0.01		2.4
The Republic of Buryatia	0.1	0.1	141.3
The Republic of Tuva	0.2		
The Republic of Khakassia	5.7	0.7	12.4
Altay Krai	80.8	82.1	101.5
Trans-Baikal Krai	0.01		12.6
Krasnoyarsk Krai	24.2	13.6	56.4
Irkutsk Region	54.6	57.0	104.4
Kemerovo region	38.9	44.0	113.2
Novosibirsk region	76.5	76.3	99.7
Omsk Region	51.4	57.9	112.5

Tomsk region	67.3	70.5	104.7
FAR EASTERN FEDERAL DISTRICT	68.9	58.3	84.7
The Republic of Sakha (Yakutia)	1.6	3.0	196.2
Kamchatka	0.3	0.2	68.0
Primorsky Krai	33.8	26.8	79.1
Khabarovsk Krai	9.9	4.5	45.1
Amur Region	22.7	23.0	101.4
Magadan region	0.1	0.4	292.1
Sakhalin Region	0.5	0.5	102.2
Yevreiskaya Autonomous Oblast	0	0	

Note: Includes data attributable to some products which are not reported in the PSD

Source: Rosstat

*Excluding Crimean Production

Table 3. Russia: Monthly Industrial Production of Poultry Meat and Sub-products All Establishments, MT, Product Weight

	2011	2012	2013	2014	2015
Jan	239,199	265,418	291,755	304,336	347,493
Feb	229,521	268,417	278,558	295,619	335,032
March	258,182	290,958	298,192	318,354	369,696
April	241,401	280,095	301,791	337,239	365,415
May	251,519	282,294	294,987	327,616	359,096
June	237,355	260,235	276,173	306,967	340,366
July	233,354	284,569	293,795	316,318	350,135
Aug	240,295	277,740	281,769	316,412	347,639
Sept	241,885	272,306	289,114	325,619	357,192
Oct	258,404	284,067	304,823	338,530	379,225
Nov	263,090	288,425	296,723	336,464	370,168
Dec	279,943	306,582	332,032	361,474	N/A

Note: Includes data attributable to some products which are not reported in the PSD

Source: Rosstat

Trade Tables

Table 4. Russia: Import Volume of Broiler Meat, 2010 – 2014 & Year To Date: 11/2014 & 11/2015, MT (020711, 020712, 020713, 020714, 160232)

	2011	2012	2013	2014	Jan-Nov-2014	Jan-Nov-2015	% Change Jan-Nov 2014/2015
World	463,423	560,958	535,429	465,142	399,435	233,699	-42.61%
Brazil	64,446	61,847	48,367	117,785	79,145	82,325	4.02%
United States	239,306	262,882	266,236	137,713	137,713	0	-100.00%
Turkey	52	341	0	16,040	12,166	20,599	69.32%
Argentina	4,745	14,026	8,221	21,699	16,505	7,842	-52.49%
EU-28	72,482	76,997	64,946	45,437	45,418	170	-99.63%
Ukraine	5,171	30,440	39,691	7,036	6,947	1,098	-84.19%
* Belarus	73,434	102,929	103,739	112,516	106,184	118,000** *	11.13%
**Kazakhstan	10	1,419	2,620	5,925	3,125	3,677	17.67%
All Others	3,777	10,077	1,609	991	504	318	-36.90%

Source: Federal Customs Service of Russia; *Belstat; **Eurasian Economic Commission (HS Code 0207)

*** FAS/Moscow Estimate

Includes data attributable to some products which are not reported in the PSD

Table 5. Russia: Export Volume of Broiler Meat, 2010 – 2014 & Year to Date: 11/2014 & 11/2015, MT (020711, 020712, 020713, 020714, 160232)

	2011	2012	2013	2014	Jan- Nov- 2014	Jan- Nov- 2015	% Change Jan- Nov 2014/2015
World	38,403	42,225	55,631	62,490	57,456	64,421	12.12%
Kazakhstan	18,406*	25,538*	30,218	23,659	21,263	31,181	46.64%
Ukraine	0	140	14	2	7	12,711	N/A
Kyrgyzstan	3	288	371	1,135	1,000	5,619	461.90%
Hong Kong	11,128	10,741	14,683	24,236	22,819	4,921	-78.43%
Vietnam	6,424	2,650	1,421	5,216	5,114	2,840	-44.47%
Belarus	895**	936**	658	2,308	2,231	2,199	-1.43%
Abkhazia	929	1,314	1,256	1,341	1,226	1,175	-4.16%
Liberia	0	54	1,459	946	841	1,360	61.71%
Thailand	0	325	2,447	1,834	1,474	405	-72.52%
All Others	618	239	3,104	1,813	1,744	2,010	15.25%

Source: Federal Customs Service of Russia; *Eurasian Economic Commission (HS Code 0207); **Belstat
Includes data attributable to some products which are not reported in the PSD