



**Flanders**  
State of the Art



# MEAT SECTOR

IN RUSSIA AND  
NORTH-WEST REGION

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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RUSSIAN AND NORTH-WEST  
REGION – MEAT SECTOR  
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## 1. Sector Profile

The Russian agriculture has been developing fast in recent years. The fast growth in agriculture has been boosted by policy measures including food embargo, import tariffs and a huge governmental support. The Russian agricultural support system has been driven by the policy focused on import substitution and self-sufficiency in meat, vegetable and other food sectors.

Russia's food embargo has been renewed since 2014, and Russia seems to favour it. Deep effects and consequences of the food embargo go beyond the official policy. Nowadays one can observe new supply chains between food producers and food processors, food processors and food retailers. Some domestic producers buy Russian-made agricultural machines and equipment. There are now companies that develop and produce high-yield seeds in Russia. These production linkages constitute the real legacy of the countersanctions, and they are not easily reversible.

Russia's meat sector has made a considerable contribution to the agricultural growth. The Russian meat market is dominated by large integrated farms, namely agricultural holdings. Most of the operations are high-technology facilities distributed across Russia. The Russian poultry and pork industries are very consolidated and continue to increase their vertical integration and improve capacity. Medium- and small-sized farms produce mainly mutton, rabbit and turkey meat.

Russia has become self-sufficient in poultry and pork, the most popular kinds of meat. Self-sufficiency in poultry and pork reaches 95%. The turkey market is growing rapidly and has an enormous market potential in terms of growth. Being an excellent source of protein, vitamins and minerals, turkey meat is getting very popular in Russia, and it is in line with a general trend in healthy lifestyle.

## 2. Meat Production: Poultry, Pork, Beef, Turkey, Rabbit

**Poultry and pig** breeding are the most well-developed meat sectors. Russia has become self-sufficient in pork and poultry (self-sufficiency rate above 95%). Russia's leading producers of poultry and pork are listed below:

**Table 1. Top-20 Meat Producers in Russia** (thousand tonnes, slaughter weight)

Company name	Profile	Production output	Website
Cherkizovo	Poultry, pig breeding, meat processing, vegetable growing	702	<a href="http://cherkizovo.com">http://cherkizovo.com</a>
Miratorg	Pig and cattle breeding (market leader in beef), poultry, meat processing	511	<a href="http://www.miratorg.ru">www.miratorg.ru</a>
Resurs	Poultry (leader in poultry), meat processing, vegetable growing, grain growing	461	<a href="http://www.gapresurs.ru">www.gapresurs.ru</a>
Prioskolie	Poultry, meat processing	380	<a href="http://www.prioskol.ru">http://www.prioskol.ru</a>
Agrocomplex named after Tkachev	Poultry, dairy, grain and vegetable growing, gardening	278	<a href="https://zao-agrokomplex.ru/">https://zao-agrokomplex.ru/</a>
BelGranKorm	Poultry, pig breeding,	261	<a href="http://jasnzeni.ru/">http://jasnzeni.ru/</a>

	cattle breeding, meat processing		
Charoen Pokphand Foods	Poultry, pig breeding, meat processing, fodder production	236	<a href="http://cpfrussia.ru">http://cpfrussia.ru</a>
Belaya Ptitsa	Poultry, meat processing, fodder production, grain growing	197	<a href="http://belaya-ptica.ru/ru/">http://belaya-ptica.ru/ru/</a>
AgroBelogorie	Poultry, pig breeding, dairy, grain growing, fodder production	171	<a href="http://www.agrobel.ru/">http://www.agrobel.ru/</a>
Velikoluksky Meat Processing Plant	Pig breeding, meat processing, grain growing, fodder production	168	<a href="http://www.vlmlk.spb.ru/">http://www.vlmlk.spb.ru/</a>
Prodo	Poultry, pig and cattle breeding, fodder production, grain growing	167	<a href="http://www.prodo.ru">http://www.prodo.ru</a>
RusAgro	Pig breeding, meat processing, fodder production, oil and fat production, grain growing	160	<a href="http://www.rusagrogroup.ru">www.rusagrogroup.ru</a>
AgroPromKomplektasiya	Pig and cattle breeding, meat processing, dairy, grain growing	150	<a href="https://www.apkholding.ru/">https://www.apkholding.ru/</a>
Siberian AgroGroup	Poultry, pig breeding, meat processing	147	<a href="http://www.sibagrogroup.ru/">http://www.sibagrogroup.ru/</a>
KoPitaniya	Pig breeding, poultry, meat processing, grain growing, fodder production	136	<a href="http://www.kopitaniya.ru/">http://www.kopitaniya.ru/</a>
AgroEco	Pig breeding, meat processing, cattle genetics, grain growing and fodder production	124	<a href="https://agroeco.ru/">https://agroeco.ru/</a>
Zdorovaya Ferma	Pig breeding, poultry, meat processing, grain growing, fodder production	106	<a href="http://zferma.ru/">http://zferma.ru/</a>
Khoroshee Delo	Poultry, cattle breeding, dairy, meat processing, grain growing and fodder production	105	<a href="https://hordel.ru/">https://hordel.ru/</a>
AgroSila	Cattle breeding and dairy, meat processing, grain growing, fodder production	91	<a href="http://agrosila-holding.ru/">http://agrosila-holding.ru/</a>
Damate	Cattle breeding and dairy, turkey breeding (market leader in turkey), meat	88	<a href="http://www.acdamate.com/">http://www.acdamate.com/</a>

	processing		
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Source: [www.agroinvestor.ru](http://www.agroinvestor.ru)

According to meat experts, the TOP-2 meat producers are tough competitors and are hard to outpace. Only Resurs and Charoen Pokphand Food can get closer to the market leaders if they pursue expansion efforts. Resurs has already outpaced Prioskolie over the last two years and stands now third in the ranking.

Meat producers are present in many Russian regions, and the largest meat producers cover several geographical regions. The table below includes the TOP 10 regions specialized in meat production.

**Table 2. TOP-10 Meat Producing Regions of Russia**

Region	Federal District
Belgorod region	Central Federal District
Chelyabinsk region	Ural Federal District
Krasnodar region	Southern Federal District
Republic of Tatarstan	Volga Federal District
Stavropol region	North Caucasus Federal District
Kursk region	Central Federal District
Republic of Bashkiria	Volga Federal District
Bryansk region	Central Federal District
Voronezh region	Central Federal District
Leningrad region	North-Western Federal District

Source: [www.agroinvestor.ru](http://www.agroinvestor.ru)

Russia's total meat production increased by 1,8% in 2019. The production of meat reached 10,9 million tonnes compared to 10,62 million tonnes a year ago. See Figure 1 below:

**Figure 1. Meat Production over the Last Decade million tonnes**



**Table 3. Meat Production over the Last Decade, million tonnes**

Year	Meat Production
2009	7
2010	7,2
2011	7,5
2012	8
2013	8,5
2014	9
2015	9,5
2016	9,9
2017	10
2018	10,6
2019*	10,9

Source: RosStat (<https://www.gks.ru/>)

\* Forecast for 2019

Poultry accounted for 46,9% of the total production, while pork and beef production accounted for 35,2% and 15,1% respectively. In recent years, pig breeding has become the main factor that drives production growth in the Russian meat sector. Pork production increased by 3% reaching almost 4 million tonnes last year. Meat market leaders including Cherkizovo, Miratorg, RusAgro, AgroBelogorie and Prodo plan to launch new facilities and increase pork production in 2020. The domestic pork market is already mature and saturated, and pork prices are going down. So apparently, the market leaders see export potential and want to export pork overseas.

Many Russian pig breeders invest in swine genetics and cost-efficient pig production because the meat sector has become highly competitive. They build nucleus farms and cattle breeding and genetics centers. It enables to achieve a higher production efficiency and a better animal welfare. Now there are nine breeding and genetics centers in Russia (see Table 4 below). They work together with global leaders in cattle genetics: Genesis (Canada), DanBred (Denmark), Topigs Norsvin (the Netherlands), Hendrix Genetics (the Netherlands).

**Table 4. Cattle Breeding and Genetics Centers in Russia**

Genetics Center	Website	Region
Hava	<a href="https://v-hava.ru/">https://v-hava.ru/</a>	Voronezh region
AgroEco Genetics Center	<a href="https://agroeco.ru/">https://agroeco.ru/</a>	Voronezh region
Otrada Gen	<a href="https://otradagroup.ru/">https://otradagroup.ru/</a>	Lipetsk region
Znamensky Genetics Center	<a href="http://nsgc.ru/">http://nsgc.ru/</a>	Orel region
Ufa Genetics Center	<a href="http://ufasgc.ru/">http://ufasgc.ru/</a>	Bashkortostan
Vishnevsky Genetics Center	<a href="http://xn--b1agiaphcs.xn--p1ai/">http://xn--b1agiaphcs.xn--p1ai/</a>	Orenburg region
AgroBelogorie	<a href="http://www.agrobel.ru/">http://www.agrobel.ru/</a>	Belgorod region
Mortadel		Vladimir region
Velikoluksky Genetics Center	<a href="http://www.vlmlk.spb.ru/">http://www.vlmlk.spb.ru/</a>	Pskov region

Source: Russian Ministry of Agriculture (<http://mcx.ru/>)

The figure below shows year-to-date (January-August) breed pig imports for 2018. In the first half of 2018, **hog** imports were about 4,33 thousand head, almost a fourfold drop compared to the imports in 2013. About 85% of the total hog imports were of Canadian origin. Other hog exporters were Belarus, Switzerland and Norway. The main breeds that are raised in Russia include Duroc, Yorkshire, Landrace and Chester White pigs.

Figure 2. Hog Imports over the Period 2013-2018, thousand head



Source: Federal Customs Service (<http://customs.ru/>)

Table 5. Hog Imports over the Period 2013-2018, thousand head

Year	Hog Imports
2013	18,5
2014	6,78
2015	2,36
2016	7,91
2017	4,95
2018*	4,33

\* January-to-August 2019

Poultry meat is a very popular product in Russia, but this market is not growing anymore due to overproduction. Last year poultry production reached 5,1 million tonnes, and market leaders, such as Cherkizovo, Miratorg, Resurs, Prioskolie, Agrokomplex, BelGranKorm and Damate, started exporting poultry products overseas. In 2019, the main export destinations were China, Japan, UAE, Serbia, Singapore, Turkey, Morocco and other African countries.

Nowadays there is a tough competition between local poultry producers. They compete with each other improving the quality of meat products, diversity of products, production efficiency. In general, continuous improvement and investments in meat safety and quality will be key factors for local producers to gain market shares in the future.

**Beef cow** breeding is Russia's most difficult meat subsector. It is not so profitable as poultry or pork and very cost-intensive. In the 1990s, there was a tremendous decline in cattle inventories. The cattle herd declined from 59 million head to 28 million head in 2000 and then below 21 million head in 2010. During those difficult times many breed herds were reduced or even eliminated. Since then cattle breeding has been gradually recovering from that dramatic decline. Now the total cow herd is only 8,3 million head (see Table 6 below). The beef herd totals 697 thousand head.

Table 6. Livestock Inventory, million head

Year	Cattle	Cows	Hogs and pigs	Sheep and goats
2018	19,0	8,3	26,3	22,8

Source: Russia in figures 2018, RosStat (<https://www.gks.ru/>)

Russia has a big shortage of beef cows. To meet this deficit, Russia has to multiply its beef herd sevenfold reaching 5 million head.



Main regions developing beef cow breeding:

- Bryansk region
- Belgorod region
- Chelyabinsk region
- Kaluga region
- Tula region
- Kaliningrad region
- Voronezh region.

Leading beef producers:

- Miratorg ([www.miratorg.ru](http://www.miratorg.ru))
- Zarechnoe (<http://zarechnoe.ru>)
- Zeros Group (<http://zeros-group.ru>).

Miratorg is Russia's leading beef producer. Its beef herd totals now 500 thousand head. The company is planning to increase its breed herd to 1 million head within 10 years. Miratorg is also planning to sell commercial breeds to other cattle breeders.

Besides, Miratorg is now developing sheep breeding in the Central part of Russia. The company has already launched two **sheep** breeding farms in Kursk and Tula regions. The sheep herd of the company totals 36 thousand head. Miratorg is planning to invest RUB 27 billion and build 10-12 sheep breeding farms if the first pilot projects turn out to be commercially successful.

Miratorg is developing export operations to other countries. The export business includes pork and poultry which are exported to Turkey, Egypt, South Korea, China, UAE and some African countries. Miratorg has qualified to export poultry and pork to Japan. Russia has never exported meat to Japan before.

As for **turkey** meat, turkey is getting very popular among Russians because it is healthy and affordable in comparison with beef. The Russian turkey market is dominated by medium- and small-sized farms that produced 259 thousand tonnes in 2018 (see Table 7 below).

**Table 7. Dynamics in Turkey Production over 2014-2018, thousand tonnes**

Year	Production output	Growth rate
2014	142	28,7%
2015	205	44%
2016	226,5	10,5%
2017	222	-2%
2018	259	16,6%
2019*	330	27%

Source: AgroConsult (<https://agricos.ru>) \* Production forecast for 2019

TOP-5 turkey producers:

- Damate (<http://acdamate.com>)
- Turkey Farm named after M. Gafury (<http://индюшкин.рф>)
- Krasnobor (<http://krasnobor.ru/>)
- Evrodon (<http://eurodon.ru/>)

- Morozovskaya Turkey Farm (<https://indey.ru/>).

The market leaders mentioned above account for 82% of the total turkey production in Russia.

Evrodon has fallen back in recent years and lost a big market share against its main competitors. In 2018, the company had to slaughter the whole flock of turkeys because of two bird flu outbreaks. The company was badly damaged and could not cope with that severe problem. As a result, Evrodon declared bankruptcy in July 2019. Now the company assets are managed and controlled by VEB RF (<https://xn--90ab5f.xn--p1ai/>) that is looking for investors for Evrodon. Cherkizovo Group (<https://cherkizovo.com/>), a market leader in poultry and pig breeding, is planning to acquire the assets of Evrodon located mainly in Rostov-on-Don. Cherkizovo is already active in turkey business and wants to strengthen its position as a market leader in Russia.

All leading turkey producers have announced plans to further increase their production because turkey meat is in great demand in Russia. Turkey accounts for 2,5% of the total meat consumption in Russia, but its per capita consumption has been rising steadily in recent years. Turkey consumption is determined by the level of income per capita and seasonality.

As for **rabbit meat**, the Russian rabbit market is very small, but has a lot of potential. The market is dominated by small-sized farms that produce 20-21 thousand tonnes annually. Medium-sized farms play a significant role in rabbit breeding, but they produce only 4 thousand tonnes annually.

China is the largest global producer of rabbit meat producing 660 thousand tonnes annually, but it has nothing to do with rabbit meat consumption. China breeds mainly Angora rabbits for Angora fiber production. Compared to China, Russia is a very small, but a growing market. In 2018, the rabbit herd totaled about 4,5 million head. The biggest rabbit breeding farms plan to expand in the nearest future, but the rabbit business is very cost-intensive. Russia sources rabbits mainly from France, technologies and equipment for rabbit breeding are also imported from France.

Leading rabbit producers:

- Krol &K (<https://kroliko.ru/>) – market leader
- Plemennoy Zavod Krolika (<http://russianrabbit.ru/>)
- Russian Rabbit (<http://rus-krol.ru/>)
- Roschinsky (<https://vk.com/public46232045>)
- Kovrov Rabbit (<http://kkrolik.ru/>)
- Zayco (<http://zayco.ru/>).

Recently, three investment projects in rabbit breeding have been announced in North-West Russia. Their total investment will be 3,5 billion roubles, and the total designed capacity will be 7,4 thousand tonnes per annum.

AFG National (<http://afg-n.ru>) is planning to build two fully integrated rabbit farms: one in Novgorod region, another in Leningrad region. The total production capacity of the two farms will be 2,4 thousand tonnes annually.

In May 2019, a new rabbit farm was launched in Volhov, Leningrad region. The designed capacity of the new farm is 45 thousand tonnes annually. The total investment is RUB 12 million.

**Quail** meat is a niche product, but its consumption is rising 4% annually regardless of the crisis. Russians who promote a healthy life style like quail and turkey meat. In Russia, there are a few medium-sized farms that breed and raise quails. The largest producers are Uglich Quail Farm

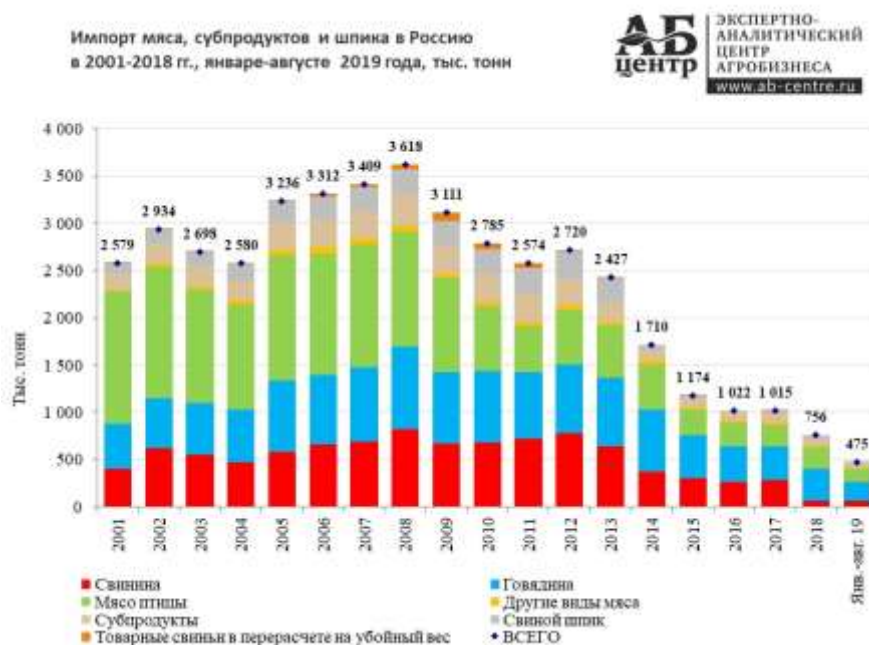
(<http://rukko.ru/>) located in Yaroslavl region, Perepelli (<http://perepelli.ru/>) located in Krasnodar region, and Shepilovo Farm (<https://1perepel.ru/>) located in Moscow region.

In general, meat production continues to indicate a positive trend pattern, although the poultry and pork markets have already reached the saturation point. In terms of demand, turkey meat has a big potential. The demand for turkey is growing in Russia, and the increase in production output is feasible due to the number of projects that will be implemented by the end of 2020.

### 3. Meat Imports

Since 2014 meat imports have been falling down below two million tonnes annually and totaled in 2018 756,1 thousand tonnes. In 2019, the meat import forecast was reduced to reflect a slower import pace in the second half of the year. The figure below depicts year-to-date meat imports for 2019. See Figure 3 below.

Figure 3. Meat Imports over the Period 2001-2019\*, thousand tonnes



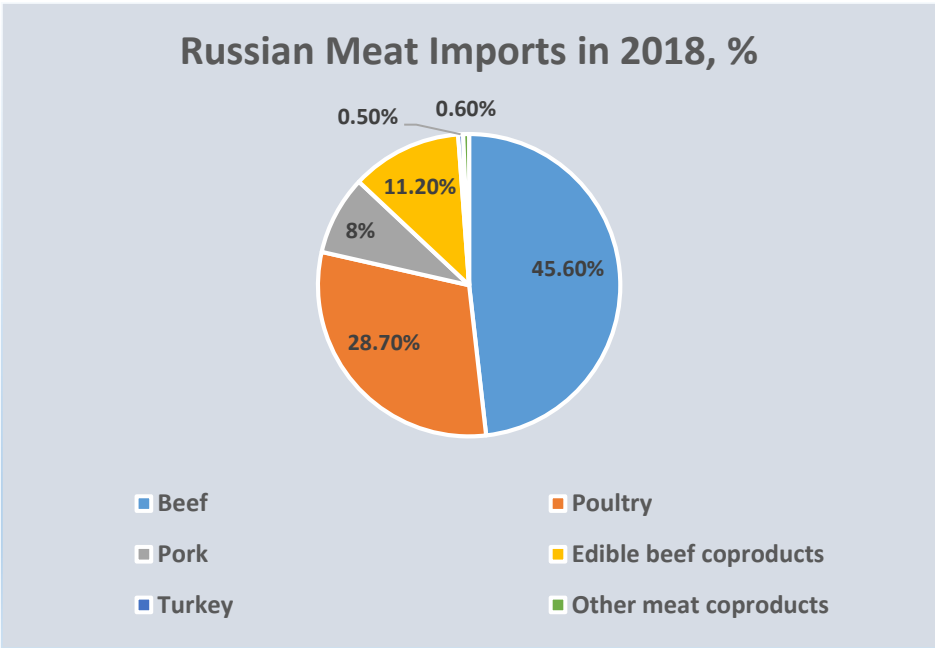
Source: AB Centre (<https://ab-centre.ru/>)

\*January-to-August 2019

In 2013, Russia imported over two million tonnes of meat and meat products. Compared to 2013, the importation of frozen beef in 2019 is less than one-half its previous volume. Pork and poultry are two-thirds lower. The main meat exporters to Russia are Brazil, Paraguay and Belarus. Brazil exports mainly frozen beef and pork, Belarus exports mainly poultry.

Despite the fact that the volume of meat imports has declined, Russia is still dependent on meat imports. Russia continues to import frozen beef, beef coproducts, deli meat products, pate's. Figure 4 depicts the structure of Russian meat imports in 2018.

Figure 4. Structure of Russian Meat Imports in 2018, %



#### 4. Per Capita Meat Consumption

Meat consumption in Russia has been on the rise since 2004 (See Figure 5 below). Last year the per capita consumption of all kinds of meat reached 75,4 kg per person. The most popular kind of meat among Russians is chicken. An average Russian consumes about 25 kg of chicken annually. Pork consumption is also on the rise reaching 22 kg per capita whilst beef consumption reaches only 17,5 kg per capita. The per capita consumption of turkey is approximately 1,8 kg per person which is very low compared to the consumption in France, Germany and Spain.

Figure 5. Per capita meat consumption in Russia



Source: AB Centre (<http://ab-centre.ru>)

## 5. African swine fever and bird flu in Russia

African swine fever is a transmissible disease caused by a complex DNA virus that affects only porcine species of all breeds. It appears among pigs, warthogs, bush pigs, wild boars and American wild pigs.

The disease came from Africa, mainly from the countries located South of the Sahara. In 2007, ASF virus spread to the Trans Caucasus Countries and Russia.

Russia has to combat ASF and bird flu diseases. Every year the Russian Federal Service for Veterinary and Phytosanitary Surveillance reports ASF and bird flu outbreaks. In 2017, there were several outbreaks of bird flu in Moscow region and Rostov region. ASF occurs mainly in the Central Federal District, and the North Caucasus region. In 2016 there were 222 outbreaks of ASF in 27 regions of Russia (see Figure 6 below). In 2019, the Russian Federal Service for Veterinary and Phytosanitary Surveillance reported 41 outbreaks of ASF, saying that that situation with ASF virus was under control. Two severe outbreaks were identified in Kaliningrad region and Kursk region. According to experts, ASF virus was transmitted by wild boars in both regions.

ASF virus is spreading across different regions of Russia. Last year, it was reported in Siberia and the Far East of Russia (Amur region).

Figure 6. Outbreaks of ASF in Russia over 2007-2019



Source: Rosselkhoznadzor (<https://www.fsvps.ru/>) \*January-September 2019

## 6. Summary

- Russia's poultry and pork sectors are very consolidated and will continue to experience a series of mergers and acquisitions to obtain sophisticated production technologies through new investments.
- The Russian poultry and pork markets have reached the saturation point. Meat producers explore new markets and open up new export opportunities.
- The Russian beef market continues to develop as a niche market limited to the demand of high-income consumers in big cities.
- Russia's meat imports have declined dramatically in recent years, but the country will continue to import high-quality beef, some pork, meat deli products.
- Local meat has become competitive in terms of quality. Most of the market leaders have qualified to export poultry and pork to Turkey, South Korea, China, Japan, Hong Kong, UAE, Egypt and other African countries.
- The per capita consumption of meat in Russia is on the rise reaching 75.4 kg per person per year.
- The epizootic situation with African swine fever and bird flu in Russia is unfavourable.

## 7. Market Opportunities for Belgian Companies

The Belgian food sector stands for high quality, innovation and diversity, and Belgium can offer many products. Belgian companies can export equipment and machines for meat butchery and processing. New projects in cattle breeding and turkey breeding are announced and ongoing in Russia. Once installed, these production capacities will require new processing capacities, so Belgium can offer agricultural equipment for cattle breeding and poultry as well as meat processing equipment.

Besides, Belgian companies can deliver meat ingredients for the meat processing sector. Many different ingredients including: spices, flavorings, preservatives, binders and additives, are used in meat processing.

Russia continues to import meat delicatessen products, but exact customs codes have to be identified and checked beforehand. So meat deli products can be exported to Russia.

## 8. Sources

1. Agricultural platform 'Agroinvestor' ([www.argoinvestor.ru](http://www.argoinvestor.ru))
2. Magazine 'Expert North-West Russia' (<http://expert.ru/>)
3. RBC Information and Marketing Agency ([www.rbc.ru](http://www.rbc.ru))
4. Newspaper 'Delovoy Petersburg' (<https://www.dp.ru/>)
5. Institute for Agricultural Market Studies (<http://www.ikar.ru>)
6. Consulting and marketing company Agriconsult (<https://agricons.ru>)
7. Consulting and marketing company AB-Centre (<http://ab-centre.ru>)

## 9. Companies referred to in the overview

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