

R E S E A R C H

AGRICULTURAL COMPLEX OF RUSSIA

Results of 2018 and Trends for 2019
Forecast up to 2021

INFO *Line*

информационное агентство

information agency

- INDUSTRY CURRENT STATE
- KEY ECONOMIC EVENTS
- INDUSTRY INVESTMENT ACTIVITY
- SITUATION IN SPECIFIC BRANCHES
- RATINGS OF AGRICULTURAL COMPANIES
- PROFILES OF COMPANIES INCLUDED IN RATING

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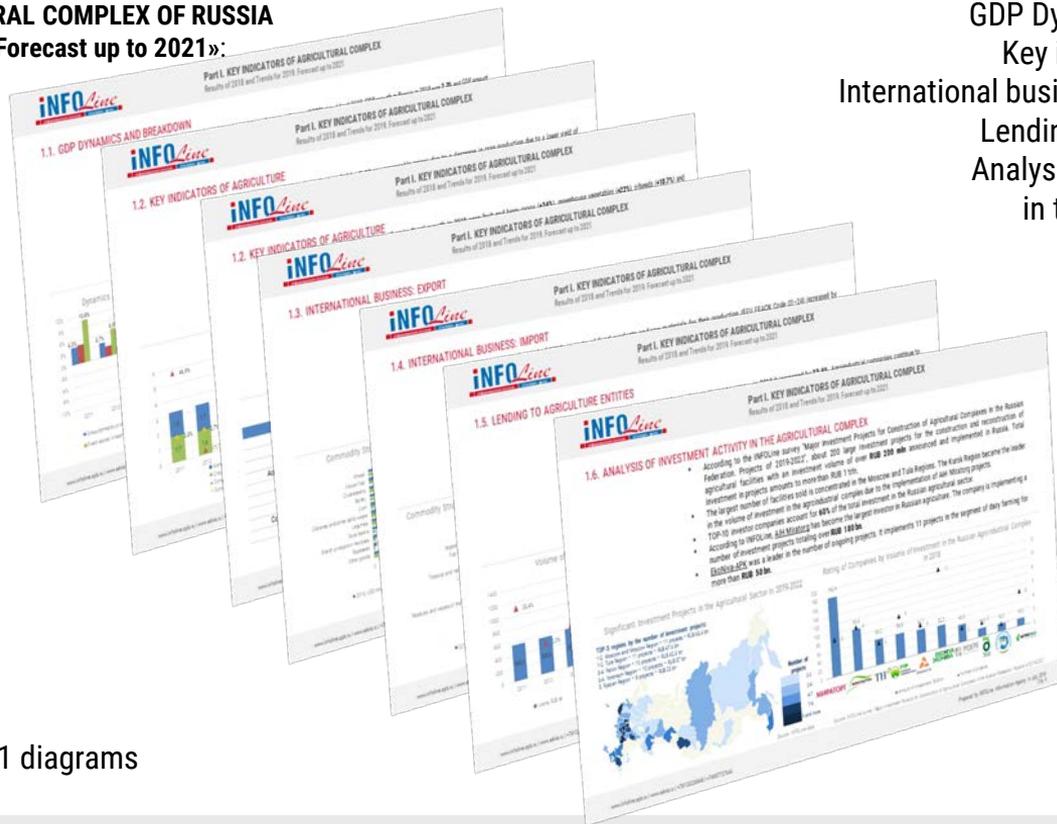
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Part I. KEY INDICATORS OF AGRICULTURAL COMPLEX

Full version of Research «**AGRICULTURAL COMPLEX OF RUSSIA**
Results of 2018 and Trends for 2019. Forecast up to 2021»:



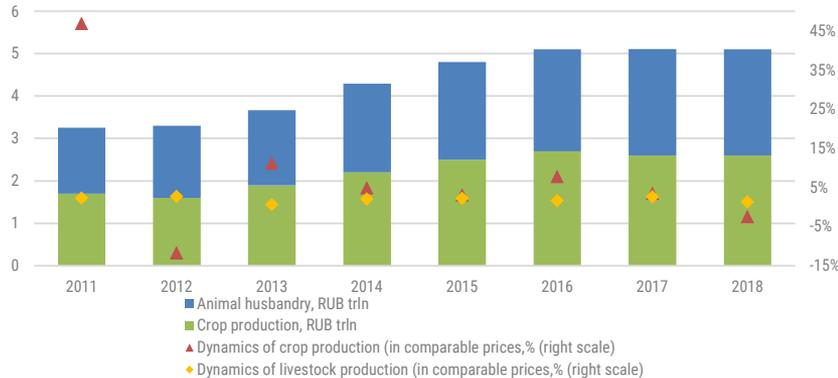
GDP Dynamics and Breakdown
Key indicators of agriculture
International business: export and import
Lending to agriculture entities
Analysis of investment activity
in the agricultural complex

Full version contains 7 slides, 11 diagrams

1.2. KEY INDICATORS OF AGRICULTURE

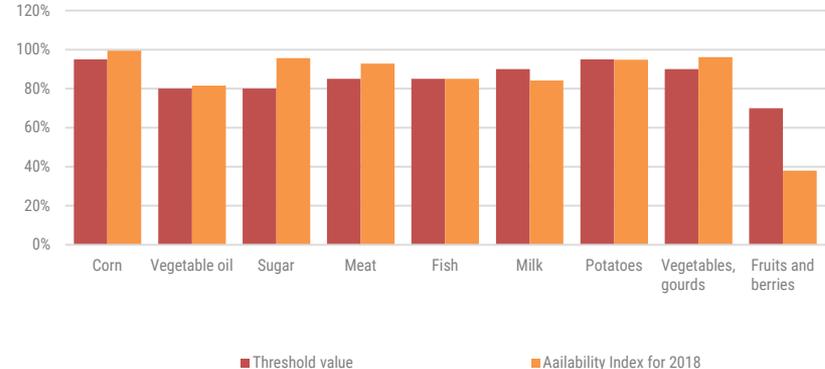
- In 2018, agricultural production fell by **0.6%** in comparable prices due to a decrease in crop production due to a lower yield of main crops (wheat, rye, barley, beets, etc.). Taking into account the growth in the food and beverage industry, the agricultural sector index in 2018 amounted to **2.3%**.
- In 2018, agricultural organizations accounted for **55.1%** of the agricultural production volume in current prices. Peasant farms and households accounted for **11.9%** and **33%**, respectively.
- One of the key factors in the agricultural production growth over the past years has been the state support and Russian products export potential. In 2018, total subsidies amounted to **RUB 254.1 bn (+77.6%** compared to 2017). In 2019, **RUB 303.6 bn** are provided **(+19.5%)**.
- At the end of 2018, almost all the indicators of the Food Security Doctrine were met, except for milk and fruits. The industry development paradigm is changing from an import substitution system to an export-oriented industry model.

Agricultural Production



Source: FSSS, INFOline calculations

Food Security Doctrine Indicators

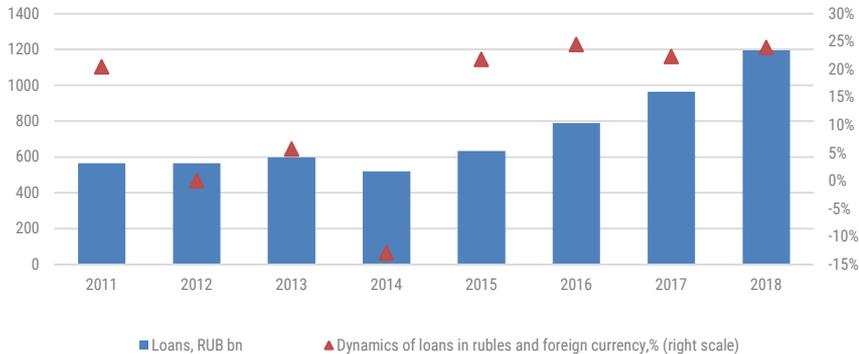


Source: Ministry of Agriculture

1.5. LENDING TO AGRICULTURE ENTITIES

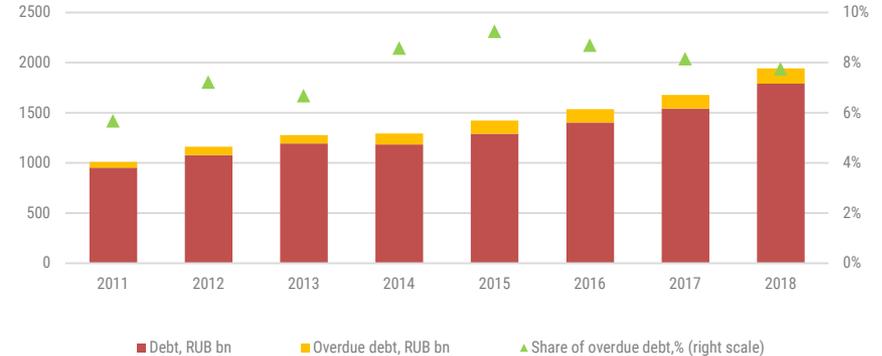
- Lending to the agroindustrial complex continues to grow – in 2018 it increased by **23.9%**. Agroindustrial companies continue to invest heavily in new agricultural production facilities.
- Loan debt in the industry grew by **15.7%** in 2018, while the share of overdue debt of industry participants continued to decrease: it amounted to **7.7%** at the end of the year.
- In 2018, agroindustrial enterprises and organizations were granted credit resources in the amount of **RUB 454.76 bn (+43.4%)** for seasonal field work including **RUB 325.73 bn (72%)** by Russian Agricultural Bank (Rosselkhozbank) and **RUB 129.03 bn (28%)** by Sberbank.
- As part of the agricultural lending program, farmers can obtain loans at a preferential rate of **5%** through accredited banks. The program was launched in 2017.
- Credit resources allocated for seasonal field work accounted for **38%** of the total volume of loans issued to industry companies.

Volume of Bank Loans to Agricultural Producers



Source: Central Bank of Russia (CBR), INFOLine estimates

Indebtedness of Agricultural Producers on Bank Loans



Source: CBR, INFOLine estimates

PART II. INDUSTRY MILESTONES

Full version of Research «**AGRICULTURAL COMPLEX OF RUSSIA**
Results of 2018 and Trends for 2019.Forecast up to 2021»:



State Agricultural Development Program
Government Regulation: Food Quality
Government Regulation: Other Events
Largest M&A Deals
Resignations and Appointments

Full version contains 18 slides

2.6. LARGEST M&A DEALS

Participants	Asset	Value, RUB bn	Closing date	Deal format and description	
 Rusagro, GK	CapitalAgro JSC Capital-Invest LLC, Trading House (TH) CapitalAgro	1.8	August 2018	Rusagro, GK bought CapitalAgro and the trading house of the same name in the Belgorod Region. The net debt of the acquired companies is RUB 1.9 bn. The deal perimeter includes complexes with 10.4 thousand sows and slaughter production with a capacity of 400 thousand pigs per year. Rusagro plans to modernize pig farms and slaughter by investing about RUB 300 mln. As a result of the deal, the holding expects to increase its share on the market for half carcasses, large lumps and consumer products.	
 VTB Group PJSC	 Summa Group	<u>22.25% of</u> <u>Novorossiysk Grain</u> <u>Plant PJSC</u>	3,1*	August 2018	VTB Group became the owner of a 22.25% stake in Novorossiysk Grain Plant (NGP). The stake was acquired in August as a result of debt settlement. Later, also in August 2018, FAS allowed VTB to acquire 10.93% of NGP voting shares (the deal will increase its stake in NGP to 33.18%). In October 2018, VTB filed an application for the purchase of 100% of NGP. As of January 2019, VTB Group owned 33.18% of the shares according to the Unified State Register of Legal Entities.
 Rusagro, GK	Ekaterina Strukova (75%), Konstantin Klemeshov (20%), Yuri Friedeman (5%) Vozrozhdenie LLC	0,55*	September 2018	Rusagro, GK acquired 100% of Vozrozhdenie LLC, which manages 11 thousand ha in the Tambov Region. The lands located near the Rusagro Nikiforovsky Sugar Plant are planned to be used for beet rotation.	
 Prodimeks, GK	 Exporthleb JSC	0,25*	September 2018	In September 2018, FAS received a request from Agroproduct LLC (part of Prodimeks, GK) to acquire 100% of Exporthlebagrotsentrplyus LLC. This company is engaged in crop production in the Voronezh Region and manages a land bank with an area of 4.5-5 thousand ha.	

* according to INFOLine estimates

2.7. RESIGNATIONS AND APPOINTMENTS: CORPORATE SECTOR



- In June 2018, Alexander Tkachev was elected **Chairman of the Board of Directors of Agrocomplex named after N.I. Tkachev JSC**. Alexander Tkachev headed the Ministry of Agriculture of Russia since April 2015. However, he was not included in the new composition of the Russian Government in May 2018. Prior to this, Tkachev led the Krasnodar Territory for 14 years.



- In September 2018, Stanislav Shalamkov was appointed **Head of the Dairy Business Line of Rusagro, GK**. Since 2011, he has been working at Bondarsky Cheesemaking Plant LLC, which was previously purchased by Rusagro, and his last position is the General Director.



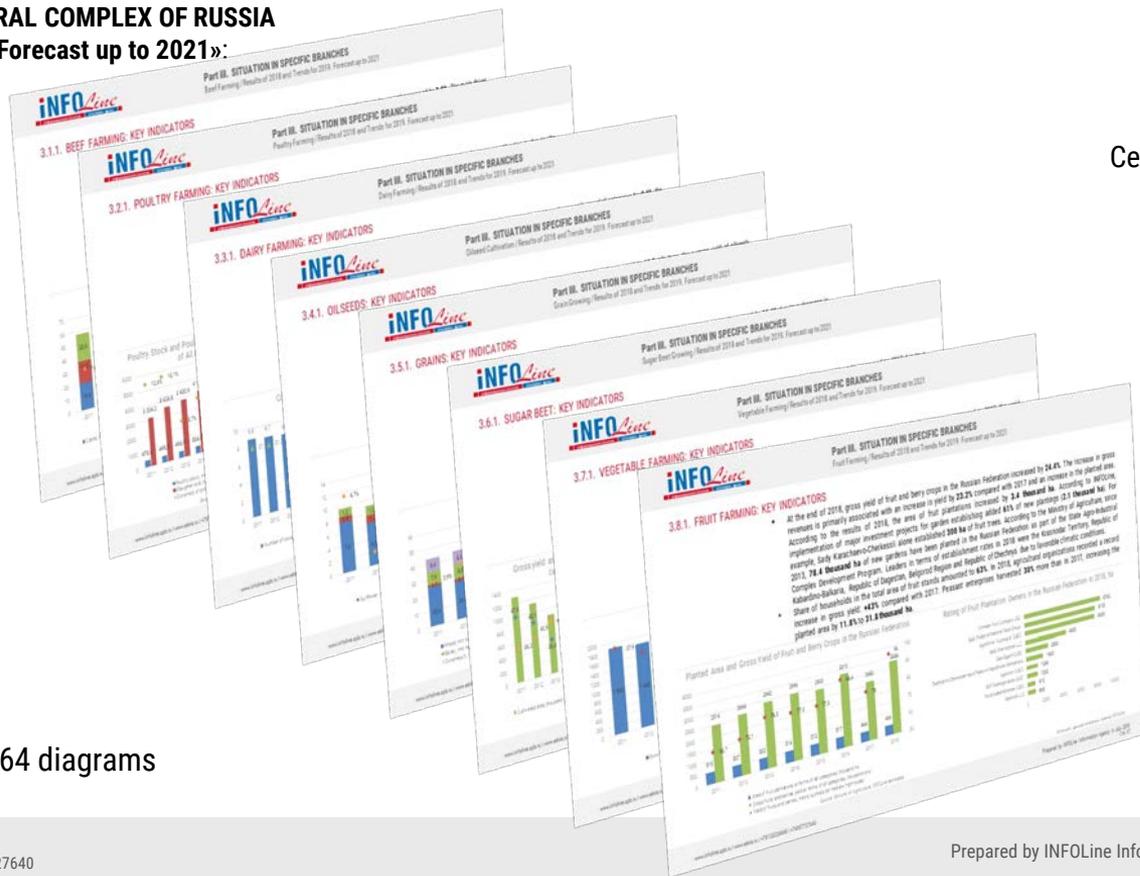
- In July 2018, Alexander Shenderyuk-Zhidkov headed the **Sodruzhestvo management company, which manages all subsidiaries of the Sodruzhestvo, GK in Russia and the CIS**. Prior to this, Shenderyuk-Zhidkov served as Deputy Chairman of the Kaliningrad Region Government where he oversaw the development of industry, agriculture, fishery complex, subsoil use and environment of the region.



- In November 2018, Sergey Korolev was appointed **Acting General Director of United Grain Company JSC**. Earlier, Sergey Korolev served as President of the National Union of Fruit and Vegetable Producers, and since 2016 he has been Chairman of the Public Council under the Ministry of Agriculture of Russia.

PART III. SITUATION IN SPECIFIC BRANCHES

Full version of Research «**AGRICULTURAL COMPLEX OF RUSSIA**
Results of 2018 and Trends for 2019. Forecast up to 2021»:



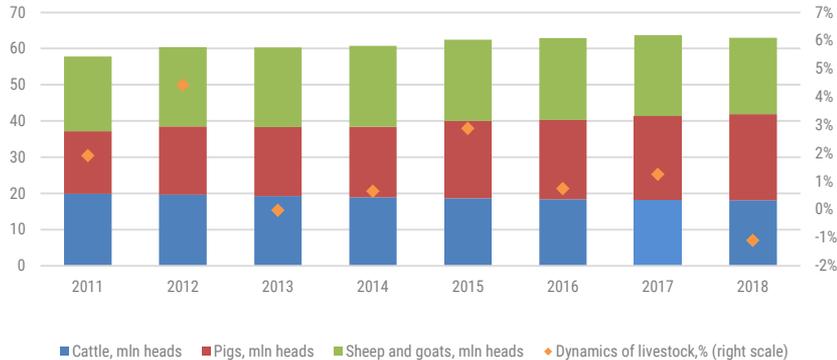
Beef Farming
Poultry Farming
Dairy Farming
Oilseeds
Cereals and Legumes
Sugar Beet
Vegetable Farming
Fruit Farming

Full version contains 46 slides, 64 diagrams

3.1.1. BEEF FARMING: KEY INDICATORS

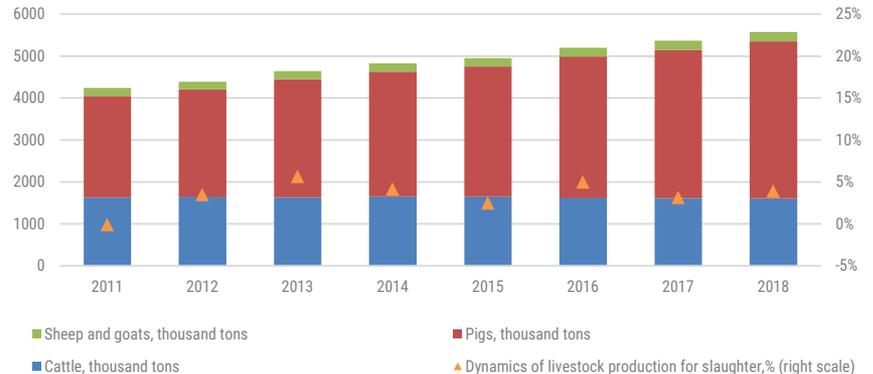
- According to the results of 2018, meat production in slaughter weight (without poultry meat) increased by **3.9%**. The main driver of growth is still pork, whose production in slaughter weight increased by **6%** (by **5%** in to **4.7 mln tons** live weight). In 2018, according to INFOLine, the capacity of pig farms increased by more than **200 thousand tons** due to the completion of major investment projects worth more than **RUB 42 bn**.
- Agricultural enterprises account for **85%** of all pig meat produced (**80%** in 2017), the competition between which continues to grow. In combination with falling household incomes, access to export markets is becoming the most promising direction. According to the National Pig Breeders Union, the TOP-20 manufacturing companies in 2018 accounted for **65%** of pork produced in slaughter weight: over the year, holdings increased their share by **3.2%** (from **2.3 mln tons** to **2.6 mln tons**). However, according to the results of 2018, the share of meat exports does not exceed **4%** of production.
- After poultry, pork remains the most consumed meat, while cattle meat more and more goes into the premium segment and becomes less accessible for the Russian consumer.

Livestock at All Farm Categories in the Russian Federation



Source: Ministry of Agriculture, INFOLine estimates

Livestock Production for Slaughter (in Slaughter Weight) in All Farm Categories

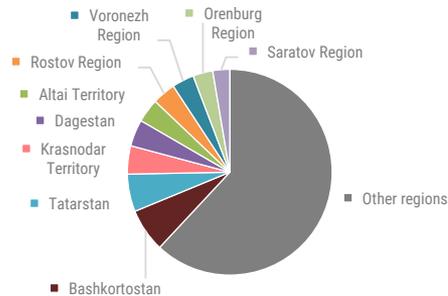


Source: Ministry of Agriculture, INFOLine estimates

3.1.1. BEEF FARMING: KEY INDICATORS

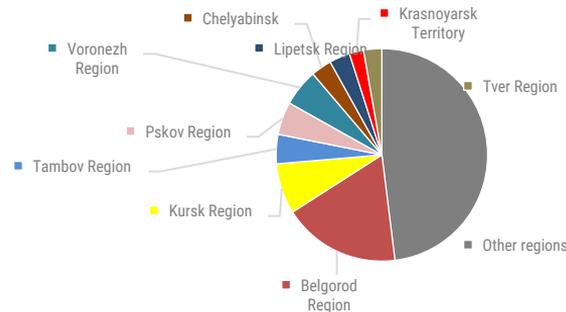
- In 2018, cattle meat production increased slightly, by **2%** to **1.6 mln tons**. The largest increase was shown by agricultural companies (**+6.9%**), which accounted for 36% of all-Russian cattle production for slaughter. The share of households in beef production decreased by **2%**, but still exceeds **50%**.
- The outlined increase in cattle meat production in agricultural organizations is associated with the ongoing investment program of the largest beef producer, AIH Miratorg. According to the results of 2018, the company increased beef production by **32%** to **108 thousand tons** in live weight, which is **11%** of cattle meat produced by agricultural organizations.
- In 2018, the number of sheep and goats continued to fall by **5.4%**. The households accounted for **47%** of the total number of sheep and goats. Agricultural organizations accounted for only **16%** due to reduce in the number of heads by **8.5%** in 2018. The meat production of sheep and goats remained at the level of 2018 and amounted to **223.8 thousand tons** in slaughter weight. Only agricultural enterprises showed an increase in production: **+13.5%** to **17.6 thousand tons**.

Cattle Production for Slaughter (in Live Weight) in 2018, %



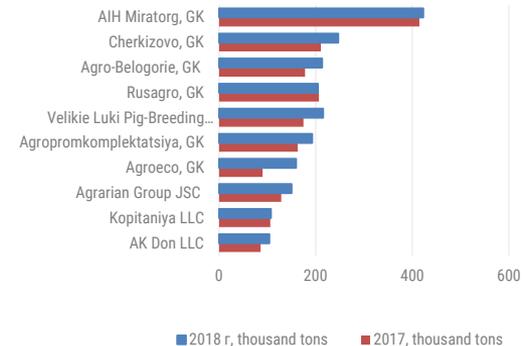
Source: Ministry of Agriculture, INFOLine estimates

Pigs Production for Slaughter (in Live Weight) in 2018, %



Source: Ministry of Agriculture, INFOLine estimates

Rating of Pork Producers (in Slaughter Weight) in 2018, thousand tons



Source: National Pig Breeders Union (NSS)

3.1.5. BEEF FARMING: MAJOR PROJECTS IN PROGRESS

Investor	Facility	Project start	Project finish	Investment, RUB bn *	Project description
 МИРАТОРГ	Complex for growing and slaughtering pigs in the Kursk Region	Q3 2017	Q4 2020	92	Construction of four pig-breeding complexes of 3 thousand sows in Fatezhsky district and three pig-breeding complexes of 3.4 thousand sows in Rylsky district. Slaughter plant capacity will be 3.7 mln heads, 346 thousand tons in slaughter weight.
AИH Miratorg	Specialized cattle feedlot in Smolensk Region	Q1 2017	2020	7.6	Construction of a specialized feedlot for the simultaneous maintenance of up to 12 thousand heads of breeding stock of cattle and up to 230 bulls of the Angus breed in the Sevsky district. The project is implemented in the Yershichsky, Pochinkovsky, Roslavlsky, Khislavichsky and Shumyachsky districts.
 РУСАГРО <small>Группа Компаний</small> Rusagro, GK	Project for the development of livestock and agricultural production in the Primorye Territory	Q3 2016	Q4 2019	40	Construction of 10 pig farms of 3 thousand sows each; breeding farm for 3 thousand sows; seed production shop; a complex for the production of animal feed comprising: a feed mill, a granary for 180 thousand tons; slaughter and meat processing with a capacity of 670 thousand heads per year; offal processing and waste disposal plant in the Mikhailovsky district.
 ВЕЛИКОЛУЖСКИЙ СВИНОВОДЧЕСКИЙ КОМПЛЕКС Velikie Luki Pig-Breeding Complex LLC	Pig-breeding complexes in the Pskov Region	Q4 2017	2021	17	Construction of 6 pig-breeding complexes in the territory of the Krasnogorodsky district. After the commissioning of all facilities, the production capacity of pig farms will be 2 mln pigs per year.
 АГРОЭКО AGROECO, GK	Pig-breeding complexes of Tulsкая Myasnaya Kompania in the Tula Region.	Q2 2018	Q4 2019	10	Construction of three modern pig-breeding complexes and a nucleus and pedigree farm with a total capacity of 420 thousand heads per year. Pig complex capacity will be 50 thousand tons of pork in live weight per year. Construction is underway in three districts of the region: Volovsky, Kurkinsky and Efremovskiy.
 RBPI Group	Pig complex SPF Serebryanye Prudy LLC in the Moscow Region	Q1 2017	Q4 2019	3.7	Construction of a full-cycle pig-breeding complex with a slaughterhouse, crematorium and a network of film lagoons-manure storages for 180 thousand heads a year on the territory of the Serebryanye Prudy urban district.
RBPI Group (RBPI, GK)	Pig complex in the Ryazan Region	Q1 2017	Q1 2020	3.7	Construction of a full-cycle pig-breeding complex for 6 thousand sows and a capacity of 180 thousand pigs per year in the Skopinsky district.

*according to INFOLine estimates

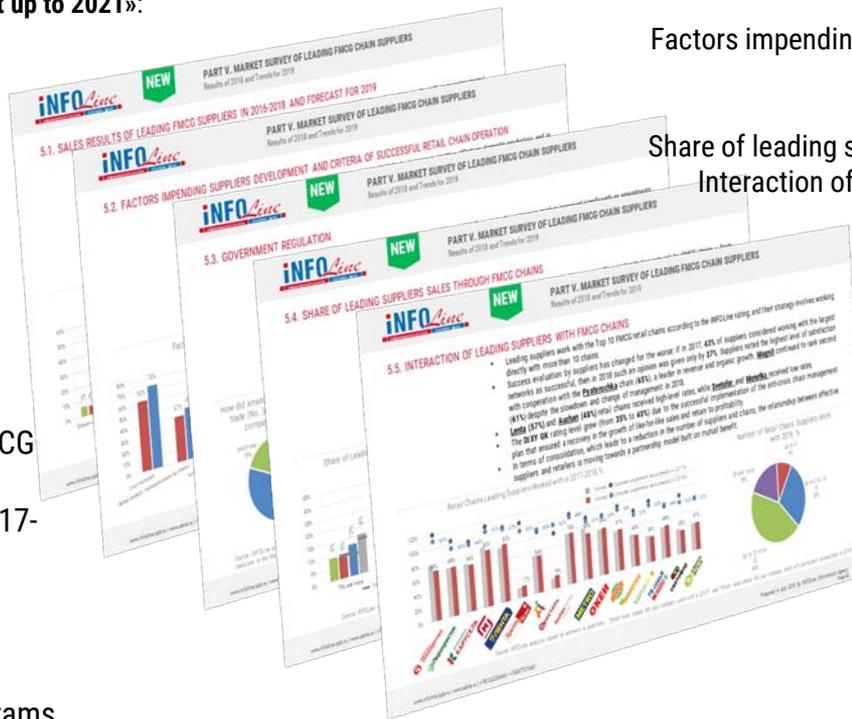
PART IV. MARKET SURVEY OF LEADING FMCG CHAIN SUPPLIERS

Full version of Research «**AGRICULTURAL COMPLEX OF RUSSIA**
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Promo sales and special range for FMCG chains in 2018 and forecast for 2019
 Online sales of leading suppliers in 2017-2018 and forecast for 2021
 Exports in sales structure in 2018 and forecast for 2019

Full version contains 8 slides, 29 diagrams

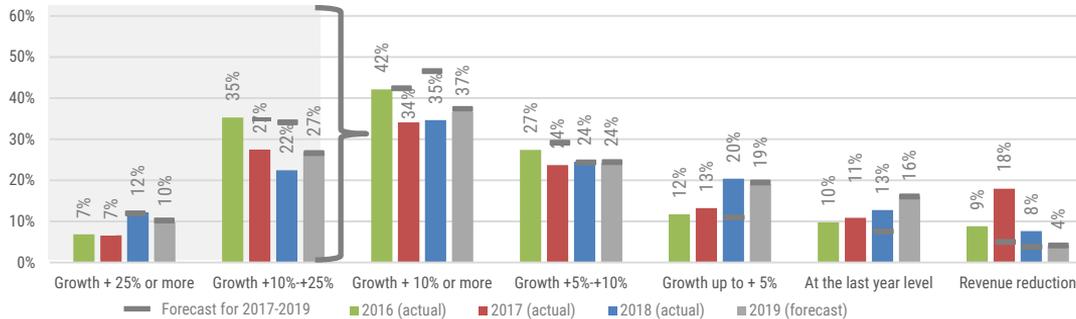


Sales results of leading FMCG suppliers in 2016-2018 and forecast for 2019
 Factors impeding suppliers development and criteria of successful retail chain operation
 Government regulation
 Share of leading suppliers sales through FMCG chains
 Interaction of leading suppliers with FMCG chains

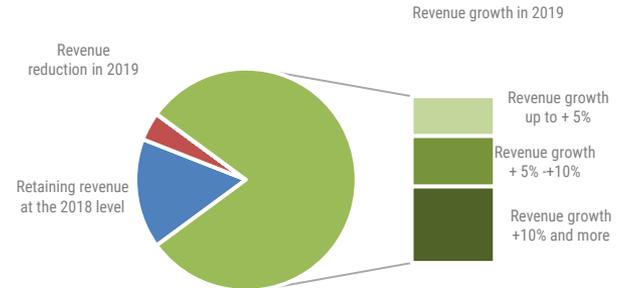
5.1. SALES RESULTS OF LEADING FMCG SUPPLIERS IN 2016-2018 AND FORECAST FOR 2019

- In 2018 retail turnover in the food segment increased by **2.1%** to **RUB 15.06 trln** in physical terms (by 4.5% in monetary terms). At the end of 2017, the indicator in physical terms increased by **1.1%**.
- In 2018, real disposable incomes of the population grew by **0.1%**. In H1 2018, real disposable monetary incomes of the population showed significant growth for the first time since 2014. This was mainly caused by the pre-election first quarter when there was a local increase in payments in the public sector for implementing the "May Decrees".
- The overwhelming majority (**80%**) of leading food products suppliers noted an increase in sales in 2018 in rubles, and more than a **third** of respondents said that sales grew by **10%** or more.
- The INFOLine forecast was confirmed: growth in sales of leading FMCG suppliers accelerated, despite the market stagnation as a whole, which is associated with consolidation (crowding out small players and replacing imports).
- Sales forecast for 2019 is somewhat more optimistic for the majority – also **80%** of respondents expect an increase in sales, and only **5%** of respondents expect a decrease.

Sales Dynamics of Leading FMCG Suppliers in 2016-2018 and Forecast for 2019,%



Plans of FMCG Suppliers on Change in Sales in 2019,%



Source: INFOLine analysis based on answers to questions: "How did sales of your company grow in 2018 (in rubles)?" and "How will sales of your company grow in 2019 (in rubles)?"

INDUSTRY MINISTRIES, DEPARTMENTS AND ASSOCIATIONS



- Ministry of Agriculture (Minselkhoz)
- Council of Federation Committee on Agrarian and Food Policy and Environmental Management
- State Duma Committee on Agrarian Issues
- Committee for Agroindustrial Complex Development of the Chamber of Commerce and Industry of the Russian Federation
- Federal Service for Veterinary and Phytosanitary Surveillance (Rosselkhoz nadzor)
- Federal Service for Supervision of Consumer Rights Protection and Human Welfare (Rosspotrebnadzor)
- Russian Fishery Agency (Rosrybolovstvo)



Rosagroleasing



▪ Russian Agricultural Bank JSC (Rosselkhozbank)



▪ Association "Greenhouses of Russia"



▪ National Union of Grain Producers (NSZ)

СОЮЗМОЛОКО

▪ National Union of Milk Producers (Soyuzmoloko)



▪ National Union of Pig Breeders (NSS)



▪ Russian Poultry Union (Rosptitsesoyuz)



▪ National Union of Beef Producers (NSPG)



▪ National Union of Fruit and Vegetable Producers (Plodoovoshchnoy soyuz)



▪ Union of sugar producers of Russia (SOYUZROSSAKHAR)

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LIST ENGLISH ABBREVIATIONS

- AIH – Agro-industrial holding
- ASF – African swine fever
- CBR – Central Bank of Russia
- CIS – Commonwealth of Independent States
- EBIDTA – Earnings before interest, taxes, depreciation and amortization
- EEC – Eurasian Economic Commission
- EEU – Eurasian Economic Union
- EEU FEACN – Foreign Economic Activity Commodity Nomenclature
- EU – European Union
- FAO – Food and Agriculture Organization of the United Nations
- FAS – Federal Antimonopoly Service
- FCS – Federal Customs Service
- FMCG – Fast Moving Consumer Goods
- FSSS – Federal State Statistics Service
- FTS – Federal Tax Service
- GDP – Gross domestic product
- GK – Group of companies
- GMO – Genetically modified organism
- M&A – Mergers and acquisitions
- MED – Ministry of Economic Development of the Russian Federation
- NCSP – Novorossiysk Commercial Sea Port
- Rosselkhozbank – Joint stock company Russian Agricultural Bank
- TH – Trading house
- UGC – United Grain Company
- WTO – World Trade Organization

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At present companies are in urgent need of monitoring and analysis of industrial events and general economic situation in the Russian Federation and around the globe. This problem may be efficiently solved only with the help of highly competent information department.

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