BRICS

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2024 / AGRICULTURAL SECTOR OVERVIEW

BRICS RUSSIA 2024

Ministry of Agriculture of the Russian Federation

AGROEXPORT

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2024 / AGRICULTURAL SECTOR OVERVIEW

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BRICS at the global agricultural market

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Expert opinion

Karina Mudaly

BRICS Business Council Agribusiness working group member (South Africa)

BRICS membership gives the member countries an opportunity to increase its export potential, provides mutual investments and closer business collaboration and stronger public buy in with policy reforms to support business growth and trade access.

Due to BRICS enlargement cross trade and investments opportunities have become more extensive through a larger net. Also, it gives us more expansion options and access to mineral resources and farm commodities from other BRICS member countries. Participation in BRICS means mutual and agreed accessibility to collaborate, partner, generate revenue, upskill and invest. In fact, it provides a forum to do so more easily with intended purpose.

Partnering, mutual investments, collaboration and incentives on high-cost labor, integration stronger buyer in and expansion into those countries, cross- country learning on best practices and upskilling (i.e exchange programs for young farmers) are to be the topics on BRICS agenda nowadays. In my opinion strong economic countries should join the BRICS since it's more beneficial for the global food market to leverage off the strengths, with the aim to be food secured, globally.

1.1. The process of creation and development of the BRICS association

BRICS (formerly BRIC) is currently an interstate association of ten states: Brazil, Russia, India, China, South Africa, Egypt, Iran, the United Arab Emirates, Saudi Arabia and Ethiopia. The countries related to BRICS may be subdivided into two kinds: the Member State and the Applicant State. The above-mentioned ten countries have the status of a Member State, while eighteen countries have been granted the applicant status, including Algeria, Argentina, Bangladesh, Bahrain, Belarus, Bolivia, Venezuela, Vietnam, Cuba, Honduras, Indonesia, Kazakhstan, Kuwait, Morocco, Nigeria, Palestine, Senegal and Thailand.

To date the BRICS members have cooperated within the framework of their selected priorities:

Development of banking and financial relations.
Final declaration on the summit results in 2023 stated the need to prepare a report on payment tools, including those based on cross-border payment systems. The new BRICS Development Bank is to play an important role in the implementation of common investment initiatives, in particular in creation of the BRICS countries finance research centers network.

Cooperation in the field of culture.
In 2022 an agreement on cooperation in the field of culture was signed between the BRICS members. This agreement is aimed at improvement of cooperation in areas like arts, cultural heritage and creative industry.

Introduction of digital technologies.
In order to get away from dollar currency dependence, Member States are actively developing their own system of international payments. The emphasis in the development of this project is on the block chain. Due to the scale of this project, it is currently under development.

Global security improvement.
Public security and the struggle against crime are also important tasks of the association. Member States seek to improve the capacity of both the countries and international organizations to respond more effectively to new traditional and non-traditional challenges, including those related to terrorism, money laundering, cyberspace, infodemia and dissemination of false information.

Significant events in the history of BRICS development

2006 **The first informal ministerial meeting in the BRIC format on the sidelines of the 61st session of the UN General Assembly in New York**

The meeting was attended by the Foreign Ministers of Russia, Brazil, China, and the Minister of Defense of India; they expressed interest in expanding multilateral cooperation.

2009 **The first official BRIC Summit in Yekaterinburg**

The BRIC leaders adopted a joint statement, which resulted in defining the goals of the association activities for promotion of the dialogue and cooperation between the countries, a consistent, active, pragmatic, open and transparent approach. Since 2009 there were held annual summits. Following the results of the summits, strategic documents are adopted, they determine the association agenda.

2011 **Official inclusion in the association of the fifth member — South Africa**

At the third BRIC summit in Sanya there took place an official inclusion of the fifth association member — South Africa, and the acronym of the association was changed: BRICS.

2015 **Development Bank foundation**

At the seventh BRICS summit in Ufa, foundation of the new Development Bank was coordinated; its capital is 100 billion US dollars.

2016 **Creation of the working group on agribusiness**

In October 2016 the BRICS members agreed to create a working group on agribusiness. This platform was formed to ensure regular dialogue between representatives of agribusiness and the governments of the BRICS countries.

2021 **Adoption of the Action Plan for Cooperation between the BRICS countries in the field of agriculture for 2021-2024.**

At the consultation of BRICS experts on cooperation in the field of agriculture, an Action Plan for 2021-2024 was developed; its objective is to facilitate the exchange of knowledge and experience in the field of agricultural research and development.

2022 **Signing of an agreement on cooperation in the field of culture**

This agreement is designed to improve cooperation in areas like arts, cultural heritage and creative industry.

2024 **Joining of Egypt, Ethiopia, Iran, the UAE and Saudi Arabia**

On January 1, 2024, five more countries have officially joined the association.

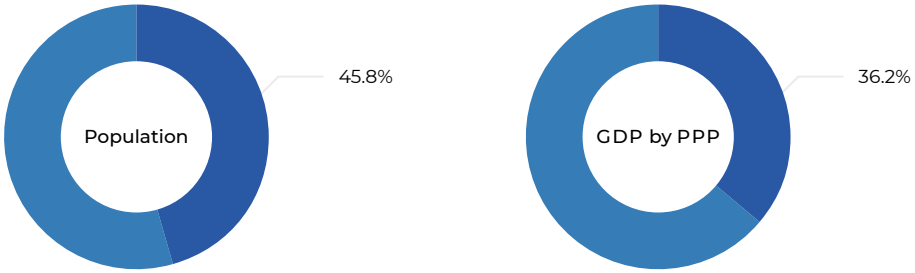
1.2. The scale and role of the BRICS countries

Every next year the BRICS association becomes an increasingly important participant in the global economy. The organization includes some of the world's largest developing countries in terms of both population and economy size. The expansion of BRICS in early 2024 marked the beginning of a new stage of the association development. Taking into account the new participants, BRICS had almost half of the world's population in 2023 — 45.8%, the association share in global GDP was 36.2% that is significantly more than the total share of developed economies belonging to the G7 (in 2023 the share of G7 countries in the global economy was 30.0%). It is worth noting, however, that the BRICS member states are heterogeneous. The organization unites states with extremely dissimilar economies: oil-producing and predominantly agricultural, with high and low levels of urbanization and income, as well as those at different stages of demographic transition and demonstrating different growth rates of macroeconomic indicators.

Such a big variety reflects the essence of the BRICS as a community of developing countries united by common objectives: democratization of global economy and trade on the principles of multipolar world order and multilateralism, promotion of the Global South role and creation of conditions for mutually beneficial cooperation that stimulates comprehensive development. Cooperation within BRICS is in a big range of areas, including politics, economics, security, as well as culture and humanitarian sphere. BRICS countries are also heterogeneous regarding their shares in the global GDP structure.

For example, in 2023 China accounted for 18.7% of global GDP by PPP terms, while the shares of the other countries were significantly lower. India's share, which ranks second among the BRICS countries in terms of GDP, was 7.6%, and Russia's was 2.9%. The share of the other participating countries vary from 0.2% for Ethiopia to 2.3% for Brazil. However, this situation is not unique for BRICS. For example, in 2023 the share of the United States in the global economy was 15.6%, while the other G7 states accounted for between 1.4% (Canada) and 3.7% (Japan) of global GDP by PPP. The key difference between the two associations is that the G7 countries have relatively low growth rates, which is typical for developed countries. In their turn, the developing BRICS countries, being in the process of realizing their existing prospects, are actively increasing their presence in the global economy, which leads to a gradual growth of their share in the global GDP.

Share of the BRICS countries by population and GDP by PPP in the world, 2023, %



Source: IMF

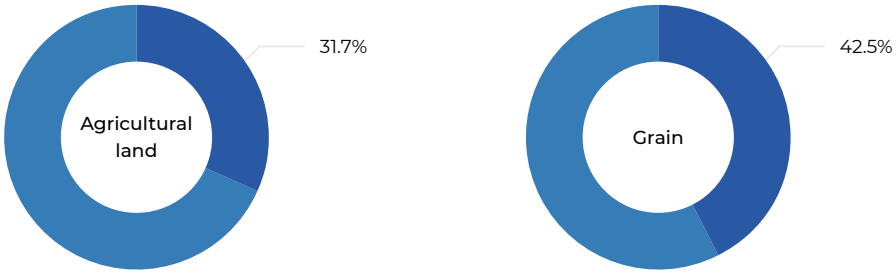
The priority areas of BRICS cooperation include the agricultural sector develompent. The association includes countries that are among the world's largest producers of agricultural goods, which makes it a significant player at the global market. At the same time the BRICS members are both net exporters and net importers of agricultural goods. The main purpose of cooperation within the organization is to ensure food security, improve the population well-being and to develop a modern, sustainable and environmentally friendly agricultural production system.

Due to geographic and climate differences the agriculture of every BRICS country has unique features that allows the association to produce a wide range of agricultural goods. These differences have a positive impact on the prospects for further development of mutually beneficial cooperation in the field of trade, exchange of experience and technology. The BRICS countries produce one third of the world's food that testifies the global importance of the association's agro-industrial sector and its key role in ensuring food security not only for the participating states, but for the whole world as well.

The share of the BRICS countries agricultural land is 31.7% of the global area. The leaders in this field are China, Brazil and Russia — they account for 10.9%, 5.0% and 4.5% of the world's agricultural land respectively.

As for the grain crops production in 2022 the BRICS countries accounted for 42.5% of the global gross harvest. Since 2018 the total grain production of the BRICS countries grew by 11.6%, which is higher than the global growth rate of 5.0%.

The BRICS countries share of global agricultural land and grain production, 2022, %



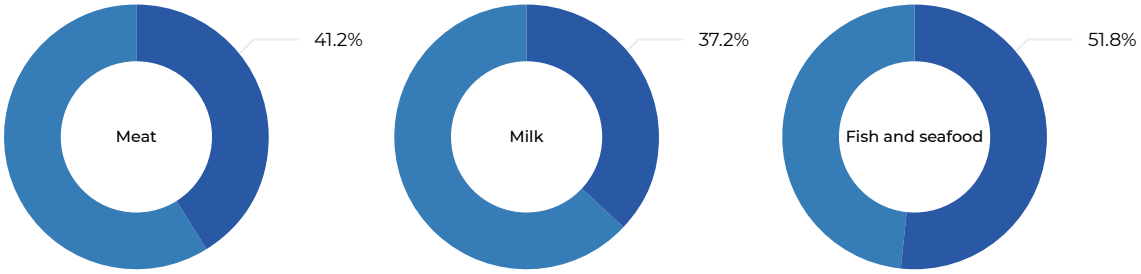
Source: World Bank, FAOSTAT, BRICS Joint Statistical Publication, national statistics agencies

The BRICS countries have a significant share of global meat production — by 2022 it amounted to 41.2%. From 2018 to 2022 this production in the association increased by 10.1% which is higher than the growth of global production — 5.7%.

In 2022 the BRICS countries accounted for 37.2% of the global milk production. Since 2018 production growth in BRICS was 13.1% while the global production growth was 6.7%.

In 2022 the BRICS countries accounted for 51.8% of the global fish production. In 2018-2022 the volume of fish production in BRICS grew by 9.9% which is higher than the global production growth of 3.9%.

The BRICS countries share of global meat, milk, fish and seafood production, 2022, %

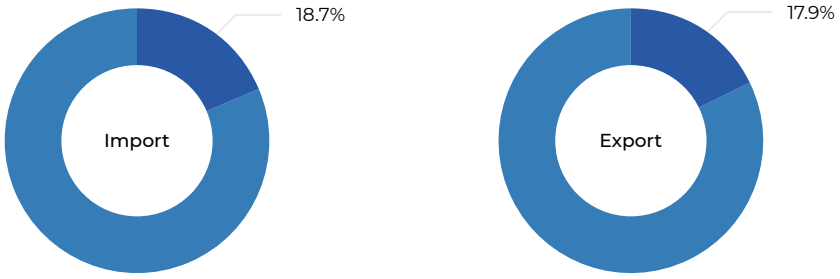


Source: FAOSTAT, BRICS Joint Statistic Publication, national statistics agencies

The share of the BRICS countries in the global import of agricultural products increased from 15.8% in 2018 to 18.7% in 2022. On average the volume of agricultural products import from the member countries increased by 12.1% annually.

In 2022 the BRICS countries export of agricultural products amounted to 17.9% of the global volume. The member countries annually increased their products supply to the global markets. The average annual growth rate of BRICS export was 9.4% per year.

The BRICS countries share of the agricultural products import and export in the global trade, 2022 %

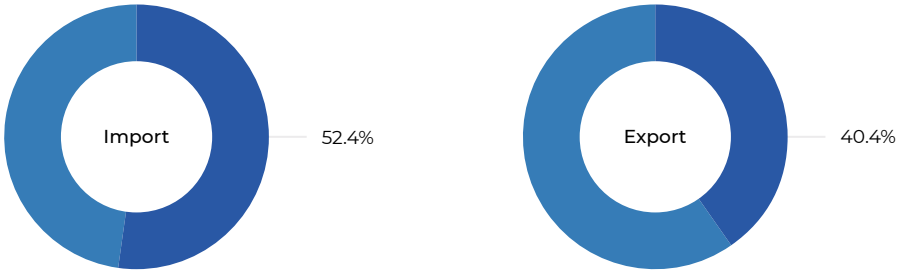


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 52.4% of the global import of oilseeds, mainly soybeans. On average the volume of oilseeds import from the member countries increased by 12.3% annually.

In the same year export of oilseeds from the BRICS countries amounted to 40.4% of global supplies. From 2018 to 2022 the volume of oilseeds export from the member countries increased by 41.2%. The average annual export growth rate for the BRICS members was 9.0% per year.

The BRICS countries share of oil crops import and export in the global trade, 2022, %

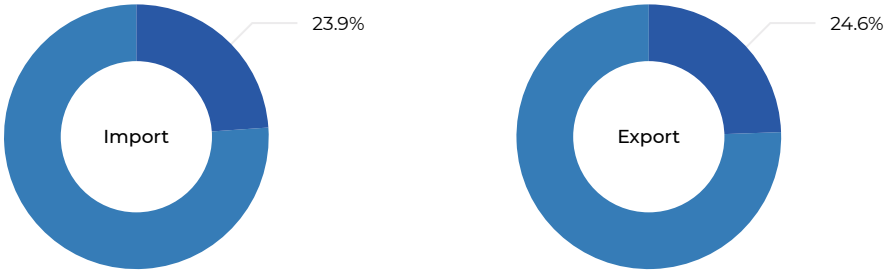


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 23.9% of the global grain import. Since 2018 the share of the BRICS countries in the global grain import has increased 2.1 times. On average the volume of grain import from the member countries increased by 19.8% annually.

In the same year export of grain crops from the BRICS countries amounted to 24.6% of the global volume. The member countries gradually increased their products supply to the global markets; thus from 2018 to 2022 the volume of grain export from the member countries increased by 79.2%. The average annual export growth rate of the BRICS members was 15.7% per year.

The BRICS countries share of grain crops import and export in the global trade, 2022, %

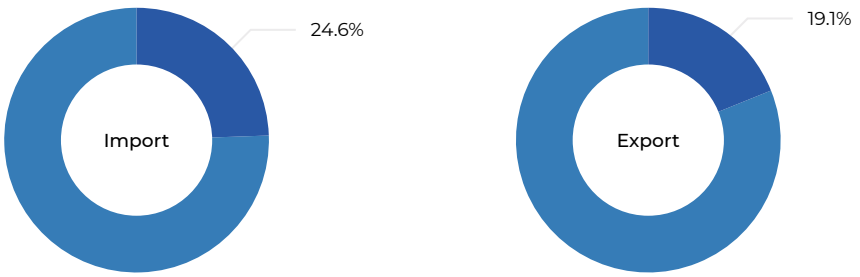


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 24.6% of the global import of meat and offal. On average the volume of import from the member countries increased by 18.7% annually.

In the same year export of meat and offal from the BRICS countries amounted to 19.1% of the global volume. Since 2018 the supply of products to global markets has increased by 54.5%. The average annual export growth rate of the BRICS members was 11.5% per year.

The BRICS countries share of meat and offal import and export in the global trade, 2022, %

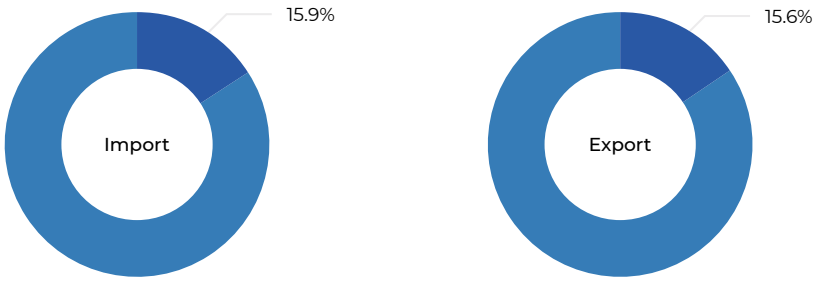


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 15.9% of the global import of vegetables, fruits and mushrooms. On average the volume of import from the member countries increased by 9.8% annually.

From 2018 to 2022 the volume of export of vegetables, mushrooms and fruits of the BRICS countries increased by 7.5%. The average annual export growth rate of the BRICS members was 1.8% per year.

The BRICS countries share of vegetables, fruits and mushrooms import and export in the global trade, 2022, %

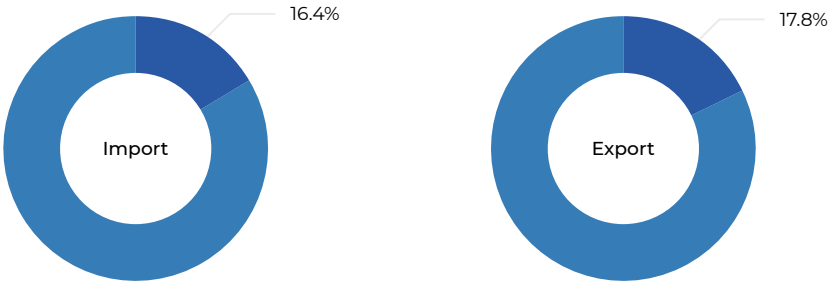


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 16.4% of the global fish and seafood import. On average the volume of import from the member countries increased by 9.6% annually.

In the same year the BRICS countries export of fish and seafood amounted to 17.8% of the global volume. In comparison with 2018 there was a slight decrease of seafood export volume from the BRICS countries by 0.7%.

The BRICS countries share of fish and seafood import and export in the global trade, 2022, %

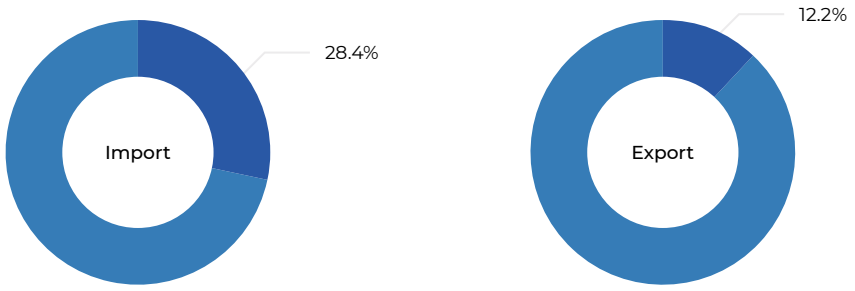


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 28.4% of the global vegetable oils import. On average the volume of import from the member countries increased by 17.7% annually.

In the same year export of vegetable oils from the BRICS countries amounted to 12.2% of the global volume. From 2018 to 2022 the volume of oil export from the member countries increased 2.9 times. The average annual export growth rate for the BRICS members was 30.7% per year.

The BRICS countries share of vegetable oils import and export in the global trade, 2022, %

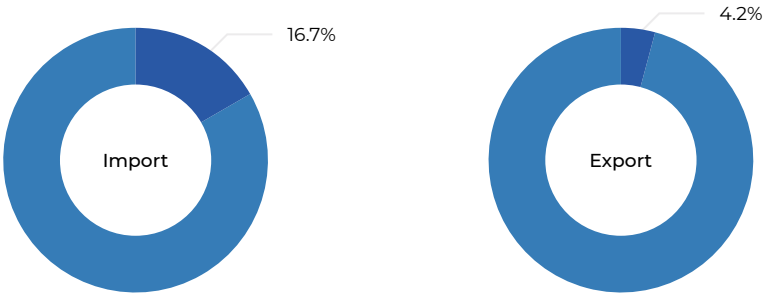


Source: ITC Trade Map, UN Comtrade

In 2022 the BRICS countries accounted for 16,7% of the global milk and dairy products import. On average the volume of import from the member countries increased by 9.6% annually.

In the same year export of milk and dairy products from the BRICS countries amounted to 4.2% of the global volume. From 2018 to 2022 the volume of oil export from the member countries increased by 9.7%. The average annual export growth rate for the BRICS members was 2.4% per year.

The BRICS countries share of milk and dairy products import and export in the global trade, 2022, %



Source: ITC Trade Map, UN Comtrade

1.3. Areas of BRICS activities in the field of agriculture

Action Plan 2012–2016 for Agricultural Cooperation of the BRICS countries

Objectives

- raising awareness in the BRICS countries about the state of agriculture development among the member countries using a unified information base;
- ensuring access to food for the most vulnerable population groups;
- intensification of efforts for reduction of climate change negative impact on food security and adaptation of agriculture to climate change;
- improvement of cooperation in the field of resources and environment, of plant residues processing and of environment protection;
- promotion of technology cooperation for support of traditional production methods to protect biodiversity.

Priorities

1) Creation of a system for information exchange between the BRICS countries in the field of agriculture.
2) Development of a common strategy to ensure access to food for the most vulnerable population groups.
3) Reduction of climate change negative impact on food security and adapting agriculture to climate change.
4) Expansion of cooperation in the field of agricultural technologies and innovations.
5) Trade development and investment promotion.

Action Plan 2017–2020 for Agricultural Cooperation of the BRICS countries

Objectives

- support of the United Nations Organization efforts in its struggle against poverty and starvation at the global level;
- implementation of national programs of the 2030 Agenda for Sustainable Development;
- improvement of the multilateral trading system;
- using technological innovations to ensure agriculture sustainability and to support agricultural development via technological cooperation and innovative achievements exchange;
- development of a basic agricultural information exchange system (BAIES) to be used commonly by the BRICS countries for cooperation at application in agriculture of modern information technologies and for promotion of the BRICS countries agricultural information and communication technologies

Priorities

1) Acceleration of agricultural development for improvement of food security and nutrition quality.
2) Promotion of cooperation and opinion exchange on climate change issues in order to increase the resilience of agriculture to natural threats.
3) Introduction of technical innovations for improvement of agriculture sustainability.
4) Expansion of agricultural trade and investment in agriculture.
5) Improvement of cooperation and information exchange for more efficient application of information and communication technologies (ICT) in the BRICS countries agriculture.

Action Plan 2021–2024 for Agricultural Cooperation of the BRICS countries

Objectives

- acceleration and support of agriculture development for improvement of food security and nutrition, taking into account the impact of the COVID-19 pandemic in all countries;
- intensification of efforts to improve the efficiency of water use in agriculture;
- support of efforts for reduction of poverty and starvation at the global level, sharing experiences in the field of food security policy, expanding the capacity of the BRICS countries to provide food and contribute to ensuring food security in the world;
- continued development of post-pandemic recovery mechanisms, including growth of trade in safe and high-quality food and investments in the agribusiness of the BRICS countries;
- promotion of preservation of agrobiodiversity to ensure food security and nutrition;
- promotion of new solutions in the field of sustainable agriculture via exchange of successful BRICS sustainability framework models with a special focus on small land owners and family farms, including models for support of women, youth and elderly farmers;
- exchange of information and best practices in the field of agriculture, including exchange via the BRICS Basic Agricultural Information Exchange System and the BRICS Agricultural Research Platform.

Priorities

1) Improvement of value chains in agriculture to ensure food security and the well-being of farmers.
2) Preservation and promotion of agrobiodiversity to ensure nutrition and sustainability.
3) Ensuring adaptation to climate change by increasing the sustainability of food and agricultural production systems via sustainable use of natural resources.
4) Promotion of digital agricultural solutions via technological innovations for achievement of SDGs.
5) Cooperation in the field of SPS measures and unified approach to healthcare.
6) Trade development.

02

BRICS countries review

Contents

Expert opinion

Arthur Alves Racy

Partner, Silo de Milho

Over the past 50 years, Brazil has become one of the world's leading net exporters of agribusiness products. The country has achieved impressive results in increasing production and productivity. Brazil's manufacturing sector is one of the most modern in the world and agriculture is the most important vector of the country's economic growth and continues to offer new prospects for future development.

Brazil's agricultural development path is similar to that of Russia, which has also shown impressive results in increasing its agricultural production and export over the past few years.

Brazil conducts active mutual trade with all BRICS countries: it imports wheat, vegetables, animal feed, exports soybeans, beef and other agro-industrial products. Agricultural trade between Brazil and other BRICS countries has been growing over the past few years and the expansion of the association offers Brazil new opportunities and prospects.

Brazil sees the BRICS countries not only as partners, but also as allies in the pursuit of a more sustainable global agricultural trade system. We are convinced that through joint efforts we have already succeeded in increasing the availability of food for our peoples and we continue to work in this direction. Sharing experience, developing investment projects and integrating supply chains can significantly strengthen our economic ties and increase the efficiency of economic and trade relations.

The joint work of the BRICS countries opens up new horizons for its members and helps them to achieve their goals in the area of food security and sustainable development. We look to the future of the association with great optimism and see great potential in deepening cooperation with BRICS partners.

2.1. Brazil

2.1.1. Social and economic profile

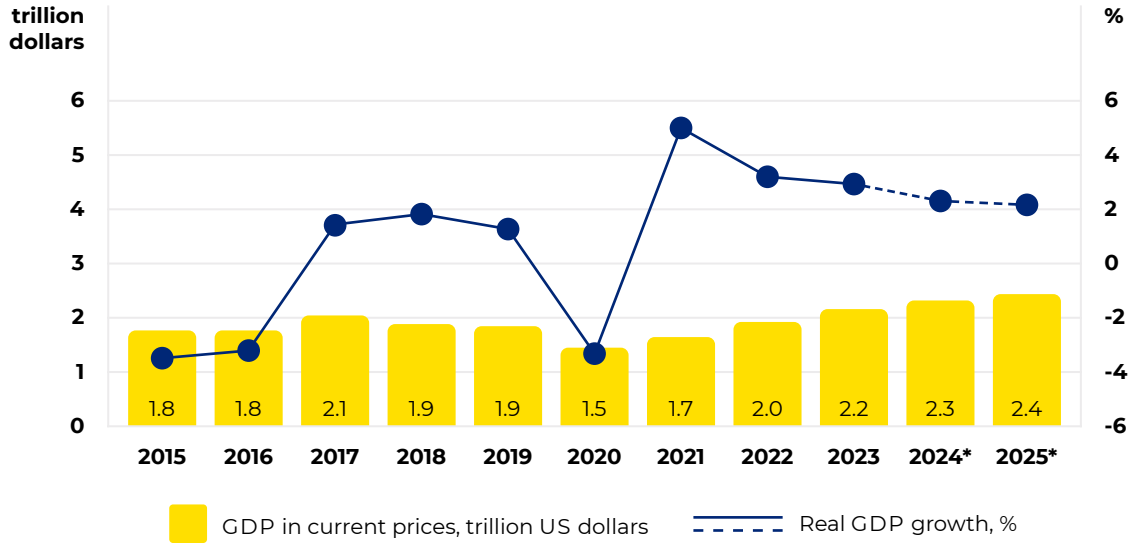
The Federative Republic of Brazil (Brazil) is the fifth largest country in the world by area and seventh most populous. Consists of 26 states and the Federal District of Brasilia. A long history of mass immigration has made Brazil one of the most ethnically diverse nations. The country is also a major producer and exporter of agricultural goods.

The country's area is 8.5 million km^2, of which 2.4 million km^2 is suitable for agriculture. The coastline is more than 7.4 thousand km. Brazil is the fifth largest country in the world in terms of land area. The length of Brazil's land border is 16.9 thousand km, the country borders on 10 countries. The urbanization rate reached 87.6% in 2022.

In the structure of Brazil's GDP agriculture accounts for about 6.8% while the industrial and service sectors account for 20.7% and 58.9%, respectively. About 8.7% of the population is employed in agriculture, 20.5% in industry and 70.8% in the service sector. The unemployment rate in Brazil in 2023 was 7.8%.

In 2022 despite inflationary pressures GDP growth was 3.0%, mainly due to a 4.3% increase in household consumption. GDP growth was also supported by the recovery of the labor market and further development of the services sector. In 2023 growth in consumer activity, as well as increased production and export of agricultural products contributed to the growth of the country's real GDP by 2.9%. GDP is expected to grow 2.2% in 2024 driven by tighter monetary policy as well as tax reform to reduce bureaucracy and ease of doing business.

Dynamics of Brazilian GDP in current prices, 2015-2025

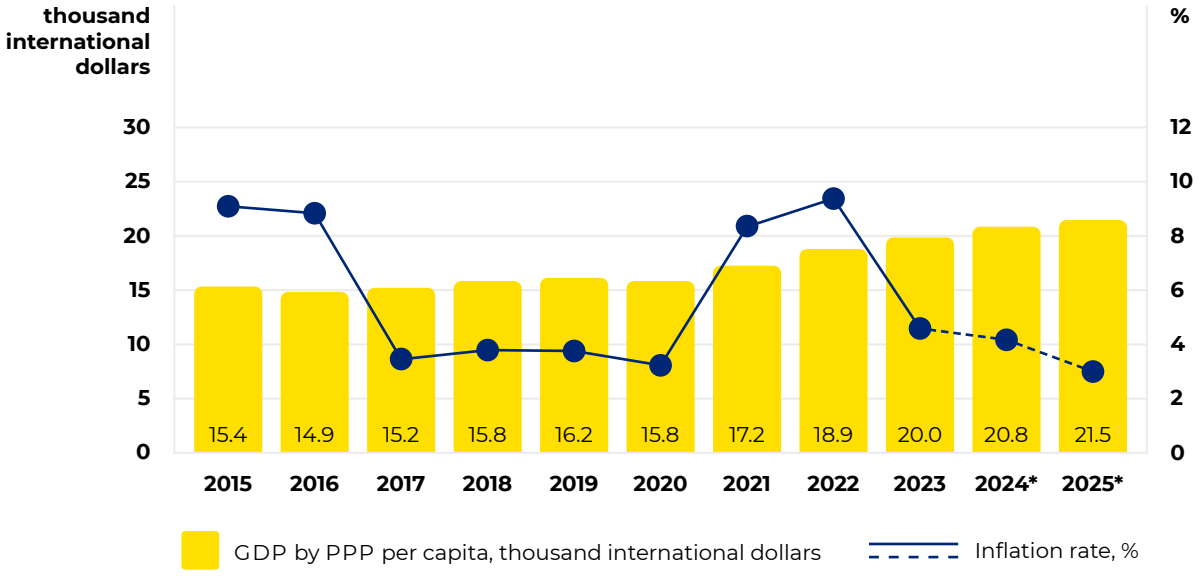


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

The GDP by PPP per capita of Brazil in 2023 amounted to 20 thousand international dollars. According to IMF forecasts, in 2025 the figure may increase to 21.5 thousand international dollars. Due to the implementation of a tight monetary policy in the country in 2023 the inflation rate decreased to 4.6%. Inflation is expected to fall to 3% in 2025 and reach the target level set by the National Monetary Council of Brazil.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

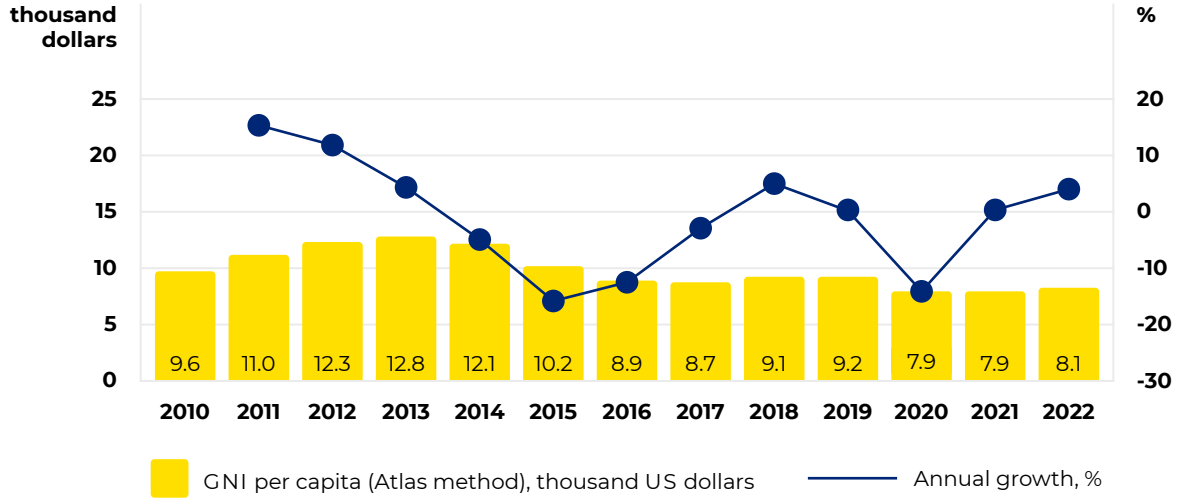


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, Brazil belongs to the group of upper-middle income countries. In 2022 Brazil's GNI per capita was 8.1 thousand US dollars.

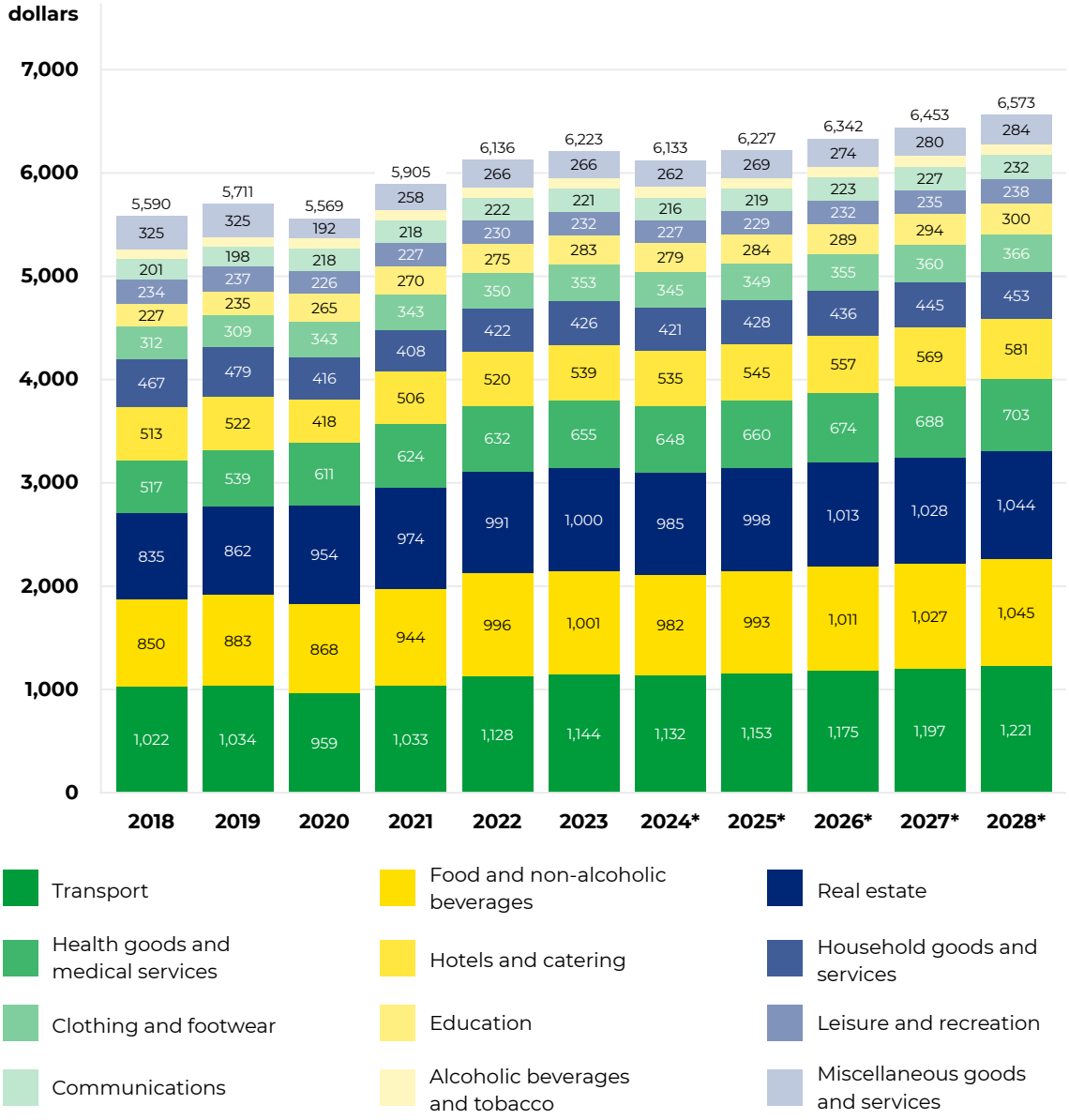
Dynamics of GNI per capita in Brazil, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 amounted to 6,223 US dollars in constant 2023 prices, which is 1.4% more than in 2022. The majority of expenses were for transport — about 18.4%. Significant expenses also occurred in food and non-alcoholic beverages (16.1%) and real estate (16.1%). By 2028 per capita final consumption expenditures are projected to reach 6,573 US dollars, of which food and non-alcoholic beverages will account for 1,045 US dollars (15.9%).

Final consumption expenditures in Brazil per capita in constant prices 2023, 2018–2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.1.2. Agriculture

2.1.2.1. Crop and livestock production

The country is the world's largest producer of soybean and sugar cane — in 2022 soybean production amounted to 120.7 million tons, which is 10.5% less than 2021. Sugar cane production in 2022 amounted to 724.4 million tons, increasing by 1.2% compared to 2021.

The largest production volumes are demonstrated by grain crops, in particular corn. Total grain production in 2022 reached 135.5 million tons, of which corn accounted for 109.4 million tons (80.7%). Compared to 2021 the production of this crop increased by 23.9% against the backdrop of favorable weather conditions.

The country also produces significant volumes of fruits and berries. 16.9 million tons of oranges, 6.9 million tons of bananas and 2.3 million tons of pineapples were produced in 2022.

Vegetables, roots and tubers are also one of the main categories of agricultural products produced in Brazil. In 2022 the volume of production amounted to 31.9 thousand tons, of which 17.6 million tons (55.2%) are cassava, 3.9 million tons (12.2%) are potatoes and 3.8 million tons (11.9%) are tomatoes.

Production of crop products, million tons

	2018	2019	2020	2021	2022
Sugar cane	**747.6**	**753.5**	**756.1**	**715.7**	**724.4**
Cereals	**103.3**	**121.2**	**125.6**	**112.0**	**135.5**
Corn	82.4	101.1	104.0	88.3	109.4
Rice	11.8	10.4	11.1	11.7	10.8
Wheat	5.5	5.6	6.3	7.9	10.3
Soybeans	**117.9**	**114.3**	**121.8**	**134.8**	**120.7**
Fruits and berries	**39.7**	**40.0**	**39.6**	**39.8**	**39.9**
Oranges	16.8	17.1	16.7	16.2	16.9
Bananas	6.7	6.8	6.6	6.8	6.9
Pineapples	2.7	2.4	2.5	2.3	2.3
Vegetables, roots and tubers	**31.8**	**31.5**	**32.0**	**32.1**	**31.9**
Cassava, fresh	17.9	17.6	18.2	18.2	17.6
Potato	3.7	3.7	3.8	3.9	3.9
Tomatoes	4.1	3.9	3.8	3.7	3.8

Source: FAOSTAT, BRICS Joint Statistical Publication, IBGE

Brazil is the second largest beef producer in the world (after the United States) with production volumes of 8.0 million tons in 2022. Brazil ranked third in the world in poultry production (after China and the United States) with 12.9 million tons. Pork was also among the main types of meat produced in the country, in 2022 the volume of pork production amounted to 5.2 million tons. Dairy production at the end of 2022 amounted to 33.6 million tons. The production volume of chicken eggs in 2022 reached 58.64 billion eggs.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	53.16	55.26	57.20	57.86	58.64
Dairy, million tons	32.9	33.9	34.3	34.2	33.6
Poultry, million tons	11.5	11.7	12.0	12.6	12.9
Beef, million tons	8.0	8.2	7.8	7.5	8.0
Pork, million tons	4.0	4.1	4.5	4.9	5.2
Fish and seafood, million tons	1.3	1.3	1.4	1.4	1.4*

Source: FAOSTAT, BRICS Joint Statistical Publication
*Note. *estimate.*

2.1.2.2. Overview of milestones in the agro-industrial complex

1909 Domestic policy

Establishment of the Ministry of Agriculture, Industry and Trade.

1945 Foreign policy

Brazil was one of the founding countries of the Food and Agriculture Organization of the United Nations (UN FAO).

1946 Foreign policy

Brazil's accession into the IMF.

1948 Foreign policy

Brazil's joining to the GATT.

1964 Domestic policy

Military coup in Brazil. The coup resulted in a series of reforms aimed at reducing inflation, increasing foreign investment and modernizing the country's market. The measures implemented by the new government laid the foundation for Brazil's Green Revolution, resulting in the country becoming a net exporter of food.

1972 Industry development

Opening of the trans-Amazonian highway, leading to connection between the western and eastern states of the country. The project was intended to facilitate the settlement and exploitation of the vast, sparsely populated Amazon River basin. The opening of the highway, in particular, contributed to the expansion of the livestock sector into the northern states.

1973 Domestic policy

The Brazilian Agricultural Research Corporation (EMBRAPA) was established with the goal of developing science and technology aimed at the country's agriculture. EMBRAPA forms the National System Agricultural Research (SNPA), which also includes federal and state agencies, universities, private companies and foundations collaborating in the field of research in different regions of the world and in different areas of scientific knowledge.

1975 Foreign policy

Brazil has acceded to the WIPO Convention.

1988 Domestic policy

Signing of the Constitution of the Federative Republic of Brazil.

1988 Domestic policy

Adoption of the first EMBRAPA master plan, which is a comprehensive strategic document of the organization in the field of development of agriculture and livestock, solving key development issues in these areas (increasing productivity, transition to renewable energy sources, equitable distribution of food, technological development, etc.).

1991 Foreign policy

Creation of the MERCOSUR trade bloc. Brazil is one of the four founding countries.

1994 Domestic policy

Initializing the Plano Real Program, aimed at combating hyperinflation, in particular, through the introduction of a new currency — the Brazilian real. As a result of the measures taken, the state reduced its participation in the country's agriculture, which led to a significant strengthening of agribusiness, increased mechanization and liberalization of foreign trade.

1995 Foreign policy

Brazil's accession to the WTO.

2004 Domestic policy

Adoption of Brazil's first four-year economic development plan. The main goals of the program include strengthening the country's economic position and social integration.

2008 Domestic policy

Adoption of Brazil's second four-year economic development plan. The main goals of the program are aimed at strengthening of social and transport infrastructure.

2011 Domestic policy

Adoption of Brazil's third four-year economic development plan. The main goals of the program are aimed at inclusive policies and sustainable development of agriculture.

2015 Domestic policy

Adoption of Brazil's fourth four-year economic development plan. The main goals of the program are aimed at economic growth and reduction of social and regional inequality.

2019 Foreign policy

Brazil has acceded to the Protocol to the Madrid Agreement Concerning the International Registration of Marks (WIPO).

2019 Domestic policy

Adoption of Brazil's fifth four-year economic development plan. The main goals of the program are aimed on improving the quality of life of the population and environmental sustainability.

2023 Foreign policy

Brazil accedes to the Hague Agreement Concerning the International Registration of Industrial Designs (WIPO).

2023 Domestic policy

Revision of EMBRAPA master plan for 2024-2030 providing a set of measures for sustainable development of agriculture and livestock farming, healthy nutrition, and digital transformation of agriculture.

2024 Domestic policy

Adoption of Brazil's sixth four-year economic development plan. The main goals of the program include reducing the level of social inequality and combating deforestation.

2.1.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

Being a major producer of agricultural products, the country has more than 30 million people, who were in a situation of severe food shortage or malnutrition in 2020-2022, according to estimates by UN FAO. Brazil's policy towards increasing self-sufficiency in basic food products is enshrined in the main strategic documents governing its agricultural development. Currently, the country is completely self-sufficient in meat, corn, soybeans, sugar, coffee and a number of other food products. In addition, over the next 10 years, Brazil will strive to achieve complete self-sufficiency in goods such as wheat and mineral fertilizers.

Bio-, nano- and geo-technologies, genetic engineering, artificial intelligence and other factors play a significant role in increasing domestic production of the most popular basic food products.

Sustainable development of agriculture

Sustainable agricultural development in Brazil involves the implementation of a set of social, economic and environmental measures that the country has consistently implemented since the 1980s. The updated EMBRAPA master plan sets the following main goals in the field of sustainable agriculture until 2030: efficient use of natural resources, application of modern technologies, protection of biodiversity and conservation of forests, increasing the availability of quality and healthy food, ensuring equal access for farmers, indigenous peoples and communities to modern technologies aimed at combating climate change.

Minimizing production and consumption waste

Important directions for the development of agriculture in Brazil are the transition to a circular economy and the use of more modern technologies to minimize waste in production. Thus, for the production of ethanol and biodiesel, which are in demand in the electric power sector, technologies are being developed that would allow use of waste from the processing of sugar cane, sweet sorghum and corn as the as raw materials. Also elephant grass, technical sorghum, as well as various other agricultural wastes would be of use for this application. Increasingly, industrial and consumer waste is subjected to a controlled anaerobic digestion process to produce biogas, biomethane and biofertilizers.

Consumption of healthy, functional and organic products

The concept of sustainable development of the food market in Brazil provides for increasing access of the country's residents to high-quality and healthy locally produced products, as well as the best products from around the world. Special attention in government programs is paid to the promotion of plant protein products (from beans, peas, lentils), including meat and dairy alternatives, food products based on algae and microalgae, edible insects, as well as products printed on special 3D printers. Another important factor in increasing access to healthy and organic products for Brazilians is the increase in the processing of agricultural products from small family farmers. Domestic tourism (agro-, gastro- and wine-tourism) developing in the country increases the population’s awareness of the nutritional characteristics of consumed products.

Development of “Blue Economy” — fish and seafood

Brazil is a major producer of fish and seafood, and the country's aquaculture sector has been developing for over 40 years. At the beginning of 2023 the Ministry of Fisheries and Aquaculture was re-established in the country. In 2022-2023 the National Aquaculture Development Plan (PNDA 2022/2023) and the National Program for Sustainable Aquaculture Development (ProAqui) have been adopted. The key areas for the development of the fisheries and aquaculture industry are increasing domestic production, export and availability of fish and seafood. From June 2023 Brazil increased the minimum insurance benefit under Defeso for fishermen during the spawning season when fishing is prohibited.

2.1.2.4. Key agricultural producers

The largest agricultural holdings in Brazil[1]

JBS S.A.

Activities	Production, processing, distribution, import, export
Industry	Meat, finished products
Description	A Brazilian company with a presence in more than 20 countries, founded in 1953, which is the world's largest producer of meat and meat products. JBS S.A headquarter is located in Sao Paulo, the company employs more than 270 thousand employees worldwide and also operates more than 450 factories. JBS S.A. has a diversified product portfolio ranging from fresh and frozen meats to ready meals under brands recognized in Brazil and other countries such as Friboi, Swift, Seara, Pilgrim's Pride, Primo. The company also specializes in biofuels, cooking oils, collagen, leather, soaps, logistics and recycling. As of 2023 the company's revenue amounted to 70.4 billion US dollars
Contact Information	**Address:** Av. Marginal Direita do Tietê, 500, Vila Jaguara São Paulo, SP, 05118-100 **Tel.:** +55 11 3144 4000 **Website:** www.jbs.com.br

Raízen S.A.

Activities	Production, processing, distribution, export
Industry	Sugar, bioethanol
Description	Raízen S.A. (subsidiary of Cosan) is the largest producer and exporter of sugar, ethyl alcohol and biofuels in Brazil. The company was founded in 2011 as a joint venture between Brazilian conglomerate Cosan and international oil company Shell. The main activities of Raízen S.A. include the production and sale of sugar and ethanol, the distribution of petroleum products and the production of electricity. With 35 production units the company operates a land bank of 1.3 million hectares for sugarcane cultivation and a network of 7,300 Shell-branded stations, serving for a total of 4 million customers in Brazil, Argentina and Paraguay. In 2022 the company announced 1.5 billion US dollars investment to build five plants to produce cellulosic ethanol, a clean biofuel also known as E2G, increasing its portfolio of low-carbon plants to nine units. As of 2023 the company's revenue amounted to approximately 47 billion US dollars
Contact Information	**Address:** Av. Brig. Faria Lima, 4100 — Itaim Bibi, São Paulo — SP, 04538-132 **Tel.:** +55 11 2344 6200 **Website:** www.raizen.com.br

[1] According to the Forbes Agro 100 2023 Brazil rating: https://forbes.com.br/forbesagro/2024/01/agro -100/

Brazil

Marfrig Global Foods S.A.

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	The company founded in 2000 in Sao Paulo is one of the largest food producers in Brazil. The company specializes in the production, processing and distribution of high value-added animal protein food products, mainly beef, as well as a wide range of ready-to-eat products such as frozen vegetables, desserts, fish and sauces. The company is one of the largest beef producers in the world. It is one of the most internationalized and diversified food companies with its products sold in more than 100 countries. The company employs approximately 30,000 employees at 21 manufacturing plants and 10 distribution and sales centers. Another activity of the company is the production and sale of plant-based products from Brazil. As of 2023 the company's revenue amounted to 26.1 billion US dollars
Contact Information	**Address:** Av. Chedid Jafet, 222 Bloco A — 5 Andar — Vila Olimp Sao Paulo, SP 04551-065 Brazil **Tel.:** +55 11 3792 8600 **E-mail:** ri@marfrig.com.br **Website:** www.marfrig.com.br

COPERSUCAR S.A.

Activities	Production, processing, distribution, export
Industry	Sugar, bioethanol
Description	Brazilian company founded in Sao Paulo in 1959 which is currently one of the world's largest producers and exporters of sugar and ethanol. The company annually processes more than 100 million tons of sugar cane and sells 4.5 million tons of sugar and approximately 5-7 billion liters of ethanol. The company operates more than 33 plants located in São Paulo, Minas Gerais, Paraná and Goiás, which are responsible for the processing of raw materials and the production of sugar and ethanol. As of 2023 the company's revenue amounted to 13.4 billion US dollars
Contact Information	**Address:** Avenida das Nações Unidas, nº 14.261 - 13º andar, Vila Cordeiro, São Paulo/SP, Brasil CEP 04794-000 **Tel.:** +55 11 2618 8166 **E-mail:** alcool@copersucar.com.br **Website:** https://copersucar.com/

Ambev S.A.

Activities	Production, distribution, import, export
Industry	Alcoholic and non-alcoholic drinks
Description	The largest Brazilian brewing company founded in 1999 which has been a subsidiary of the Belgian conglomerate AB InBev since 2008. The company was created as a result of the merger of two breweries Cervejaira Brahma and Companhia Antarctica. Ambev operates in the Americas, supplying its products and operating production facilities in these countries. The company's products include more than 20 types of beer, including the most famous Stella Artois and Corona, juices and sweet sodas. The company is also PepsiCo's main bottler outside the United States, supplying PepsiCo products in Brazil and other Latin American countries, including brands such as Pepsi, Lipton Ice Tea and Gatorade under a franchise agreement. The company's annual revenues in 2023 are 16.0 billion US dollars
Contact Information	**Address:** 1017, 3rd floor, Rua Dr. Renato Paes De Barros, Sao Paulo, 04530 **Tel.:** +55 11 2122 1200 **Website:** www.ambev.com.br

BRF S.A.

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	The Brazilian company founded in 1934 is one of the largest food manufacturers. The main activity of the company is the production and processing of beef, pork, chicken, turkey and lamb, as well as the breeding and trading livestock. In Brazil the company operates 30 factories and 20 distribution centers, in addition to which the company has production facilities in the UAE, Malaysia, the Netherlands, Turkey, Thailand and Argentina and more than 27 distribution centers around the world. As a major producer and exporter of meat, poultry and ready-to-eat meat products, the company has a portfolio of more than 800 products, a significant portion of which are sold under the world-famous Sadia and Perdigão brands. As of 2023 the company's revenue amounted to 11.0 billion US dollars
Contact Information	**Address:** Rua Jorge Tzachel 475 Itajai, Santa Catarina, 88301-600 Brazil **Tel.:** +55 11 2322 5000 **E-mail:** info@brf-globalbr.com **Website:** www.brf-globalbr.com

Brazil

AMAGGI

Activities	Production, processing, distribution, import, export
Industry	Cereals, legumes
Description	The Brazilian company founded in 1977 in São Miguel Iguaçu is the country's largest producer and exporter of soybeans, corn and cotton. The company manages a land bank of 362 thousand hectares and annually produces 1.2 million tons of agricultural products. The AMAGGI Commodities division specializes in imported and local purchases and sells grain through commercial offices in Brazil, Argentina, the Netherlands, Switzerland, Paraguay and China. All types of garin transportation are provided by the AMMAGI Logistics and Operations division. The division's activities also include the management of grain warehouses, terminals, ports, soybean processing plants in Brazil and Norway, and a fertilizer blending plant in Comodoro. As of 2023 the company's revenue was 9.0 billion US dollars
Contact Information	**Address:** Av. André Maggi, 303 - Alvorada, Cuiabá/MT. CEP. 78049-080 **Tel.:** +55 65 3645 5000 **E-mail:** assessoria.comunicacao@amaggi.com.br **Website:** www.amaggi.com.br

Coamo Agroindustrial Cooperativa

Activities	Production, processing, distribution, export
Industry	Cereals and legumes, oil and fat, coffee, ready-to-eat products
Description	The largest Brazilian cooperative founded in 1970 by a group of 79 farmers located in the central-western region of Paraná. The cooperative has 123 units located in 74 municipalities in Parana, Santa Catarina and Mato Grosso do Sul and accumulates agricultural products from more than 31 thousand farmers for further processing and sale. In 2022 Coamo accounted for 2.8% of Brazil's grain production, demonstrating its strategic importance in food production nationally and internationally. The cooperative has a storage capacity of more than 7 million tons and the main products are soybeans, corn, wheat and coffee. Coamo also specializes in the production of branded products under its own label including flour, cooking oils and baking mixes. In 2023 the cooperative launched the production of feed for production and domestic animals, aquculture. As of 2023 the company's revenue amounted to 5.8 billion US dollars
Contact Information	**Address:** Administração Central Rua Fioravante João Ferri, 99 Jardim Alvorada — Caixa Postal 460 **Tel.:** +55 44 3599 8000 **Website:** www.coamo.com.br

Minerva Foods

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	Brazilian food company founded in 1924 in the city of Barretos. The company is a leader in the export of beef and meat products in South America supplying its products for more that 100 foreign markets. Beyond Brazil Minerva Foods is represented in Paraguay, Argentina, Uruguay, Colombia and also has specialized sheep breeding plants in Australia. In total the company operates 33 manufacturing facilities, 14 distribution centers and 17 international offices. The company also specializes in the production of ingredients such as bone and meat and bone meal, blood meal, as well as various food casings obtained during beef processing. Minerva subsidiary Biodiesel also specializes in the production of renewable energy sources such as biofuels from vegetable and animal fats. As of 2023 the company's revenue amounted to 5.4 billion US dollars
Contact Information	**Address:** Avenida Antônio Manço Bernardes s/nº, Barretos – São Paulo 14781-545 **Tel.:** +55 17 3321 3355 **E-mail:** export@minervafoods.com **Website:** https://minervafoods.com

C. Vale — Cooperativa Agroindustrial

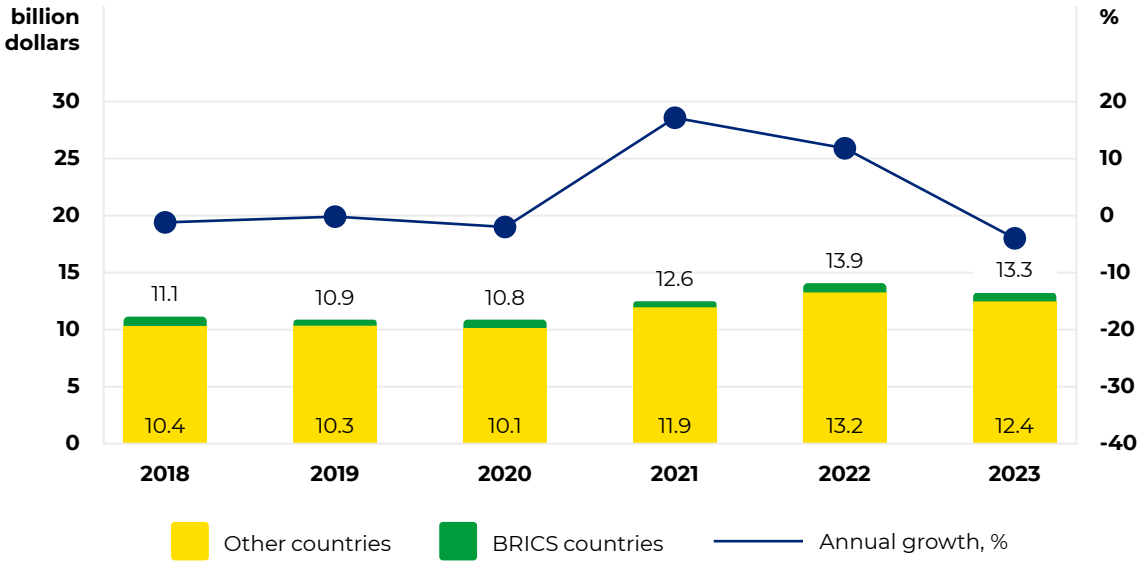
Activities	Production, processing, distribution, import, export
Industry	Cereals, legumes, meat, dairy, fish
Description	Brazilian agro-industrial cooperative based in Palotina, Paraná state, founded in 1963. The company specializes in the production, processing and sale of grains and legumes, dairy and meat products. The cooperative is also active in the poultry, pig and aquaculture industries. In total the cooperative unites more than 26 thousand farmers and employs more than 13 thousand people, managing more than 189 business units located mainly in Latin America. In the industrial segment C. Vale produces modified cassava starch and feed. The company also produces soybean seeds in Santa Catarina which are sold throughout Brazil. C.Vale finances production by providing loans to members of cooperatives, as well as conducting various educational activities. As of 2023 the company's revenue amounted to 4.2 billion US dollars
Contact Information	**Address:** Av. Independência, 2347, Centro, CEP 85950-000, Palotina, Paraná **Tel.:** +55 44 3649 8181 **Website:** www.cvale.com.br

2.1.3. Foreign trade in agricultural products

2.1.3.1. Import of agricultural products

In 2023 import of agricultural products from Brazil amounted to 13.3 billion US dollars, which is 4.4% (-617.5 million US dollars) below the level of 2022. In 2023 import from the BRICS countries increased by 27.0% (+195.3 million US dollars) compared to the previous year, while import from other countries decreased by 6.1% (-812.9 million US dollars). Volume of import of agricultural products in 2018–2023 increased by an average of 3.8% per year.

Import of agricultural products of Brazil, 2018-2023, billion US dollars



Source: ITC Trade Map

At the end of 2023 the top 5 imported agricultural products of Brazil included wheat (9.7% of import value), malt (6.5%), fresh and chilled fish (5.8%), milk powder (5.5%) and olive oil (4.4%). In total the top 10 products accounted for 46.8% of Brazilian agricultural import in value terms.

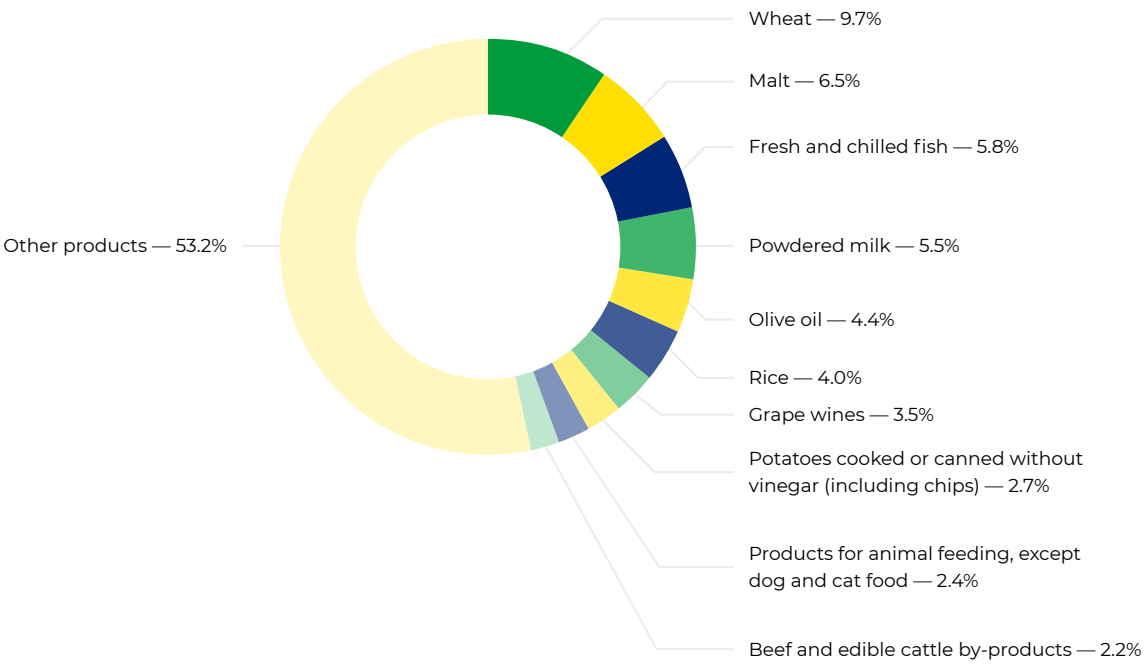
Import structure of Brazilian agricultural products in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	1,502.4	1,491.1	1,343.1	1,669.0	2,050.1	1,292.3	-757.9	-37.0
2	Malt	405.0	543.6	535.4	693.1	738.8	867.6	128.7	17.4

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
3	Fish fresh and chilled	505.7	528.6	366.1	610.8	747.0	777.1	30.2	4.0
4	Powdered milk	271.5	245.0	340.9	246.4	440.3	738.6	298.2	67.7
5	Olive oil	435.2	401.1	422.5	440.3	540.0	589.6	49.6	9.2
6	Rice	217.3	244.7	376.5	316.8	350.1	529.5	179.4	51.2
7	Grape wines	375.6	371.6	421.8	476.6	459.8	467.1	7.3	1.6
8	Potatoes cooked or canned without vinegar (including chips)	316.4	327.7	287.9	296.5	356.8	360.5	3.7	1.0
9	Products for animal feeding, except food for dogs and cats	264.6	251.4	302.6	310.6	334.7	324.9	-9.8	-2.9
10	Beef and cattle by-products	229.3	218.8	213.6	289.1	381.5	289.4	-92.2	-24.2
	Other products	6,528.2	6,324.5	6,159.0	7,220.0	7,548.3	7,093.3	-455.0	-6.0
	Total	**11,051.2**	**10,948.3**	**10,769.3**	**12,569.1**	**13,947.4**	**13,329.9**	**-617.5**	**-4.4**

Source: ITC Trade Map

Import structure of Brazilian agricultural products in value terms, 2023, %



Source: ITC Trade Map

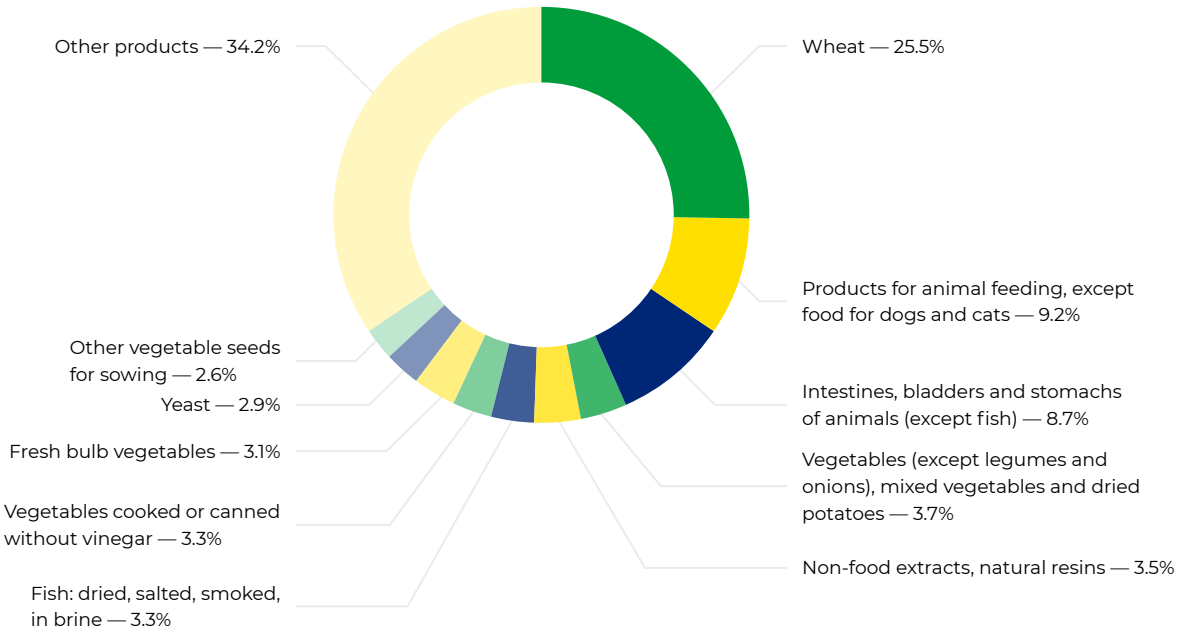
At the end of 2023 the structure of Brazil's import from the BRICS countries was dominated by wheat (25.5% of import by value). The top 5 imported products also included products for animal feeding, except food for dogs and cats (9.2%), intestines, bladders and stomachs of animals (except fish) (8.7%), vegetables (except legumes and onions), vegetable mixtures and dried potatoes (3.7%) and non-food extracts, natural resins (3.5%). In total the top 10 commodity items accounted for 65.8% of Brazilian agricultural import from the BRICS countries in value terms.

Import structure of Brazilian agricultural products from the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	5.8	18.4	49.1	7.0	98.9	234.6	135.8	2.4 times
2	Products for animal feeding, except food for dogs and cats	66.9	71.3	83.2	76.4	104.7	84.5	-20.2	-19.3
3	Intestines, bladders and stomachs of animals (except fish)	99.4	91.5	85.1	87.0	91.3	80.1	-11.2	-12.3
4	Vegetables (except legumes and onions), mixed vegetables and dried potatoes	21.8	21.9	29.4	26.4	32.6	34.4	1.8	5.4
5	Non-food extracts, natural resins	21.7	23.3	22.3	28.4	33.4	31.9	-1.5	-4.4
6	Fish dried, salted, smoked, in brine	56.5	43.5	37.0	27.1	28.9	30.4	1.5	5.1
7	Vegetables cooked or canned without vinegar	18.2	7.4	31.4	28.8	12.9	30.0	17.1	131.8
8	Fresh bulb vegetables	50.5	75.7	111.8	49.6	22.7	28.9	6.2	27.3
9	Yeast	17.8	16.3	16.4	12.9	14.6	27.1	12.5	85.9
10	Other vegetable seeds for sowing	18.0	18.1	17.5	21.3	24.1	23.7	-0.3	-1.4
	Other products	254.9	235.7	223.6	284.5	260.4	314.2	53.8	20.7
	Total	**631.6**	**623.0**	**706.7**	**649.4**	**724.5**	**919.8**	**195.3**	**27.0**

Source: ITC Trade Map

Import structure of Brazilian agricultural products from the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

At the end of 2023 the top 5 imported agricultural products of Brazil from other countries included wheat (8.5% of import value), malt (7.0%), fresh and chilled fish (6.3%), milk powder (6.0%) and olive oil (4.7%). In total the top 10 commodity items accounted for 47.9% of import of Brazilian agricultural products from other countries in value terms.

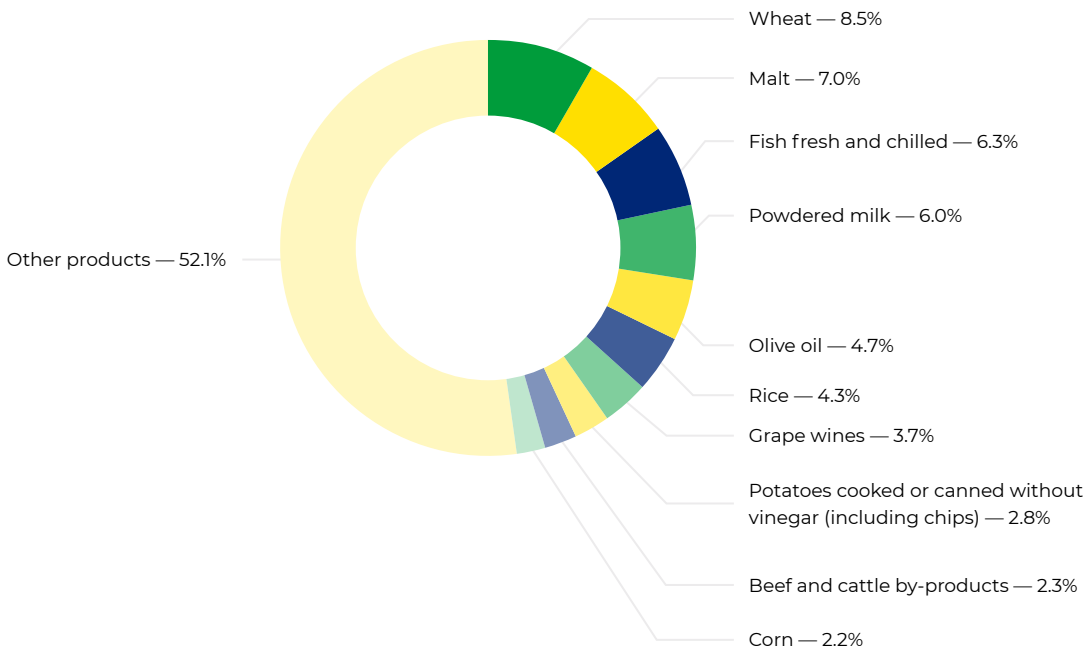
Import structure of Brazilian agricultural products from other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	1,496.6	1,472.7	1,294.0	1,662.0	1,951.2	1,057.6	-893.6	-45.8
2	Malt	405.0	530.9	521.1	624.3	720.5	867.6	147.1	20.4
3	Fish fresh and chilled	505.7	528.6	366.1	610.8	747.0	777.1	30.2	4.0
4	Powdered milk	271.5	245.0	340.9	246.4	440.3	738.6	298.2	67.7
5	Olive oil	435.2	401.1	422.5	439.9	540.0	588.8	48.8	9.0
6	Rice	217.3	244.7	367.8	309.6	350.1	529.4	179.3	51.2
7	Grape wines	371.9	367.9	420.0	473.9	457.4	465.3	7.9	1.7
8	Potatoes cooked or canned without vinegar (including chips)	315.7	326.5	286.5	296.0	356.4	350.3	-6.1	-1.7

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
9	Beef and cattle by-products	229.3	218.8	213.6	289.1	381.5	289.4	-92.2	-24.2
10	Corn	150.1	199.2	203.0	733.6	612.5	276.2	-336.3	-54.9
	Other products	6,021.3	5,789.7	5,627.1	6,234.2	6,665.9	6,469.8	-196.1	-2.9
	Total	**10,419.7**	**10,325.3**	**10,062.6**	**11,919.7**	**13,222.9**	**12,410.0**	**-812.9**	**-6.1**

Source: ITC Trade Map

Import structure of Brazilian agricultural products from other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest exporters of agricultural products to Brazil were China (3.4% of import in value terms), Russia (1.8%), India (0.8%) and Egypt (0.6%). In total the BRICS member states accounted for 6.9% of Brazilian agricultural import.

Also among the largest exporting countries in 2023 were Argentina (24.1% of import in value terms), Uruguay (10.9%) and Chile (10.6%). Collectively, the top 10 countries accounted for 73.1% of Brazilian agricultural import in value terms.

The main countries exporting agricultural products to Brazil in value terms, 2018–2023, million US dollars

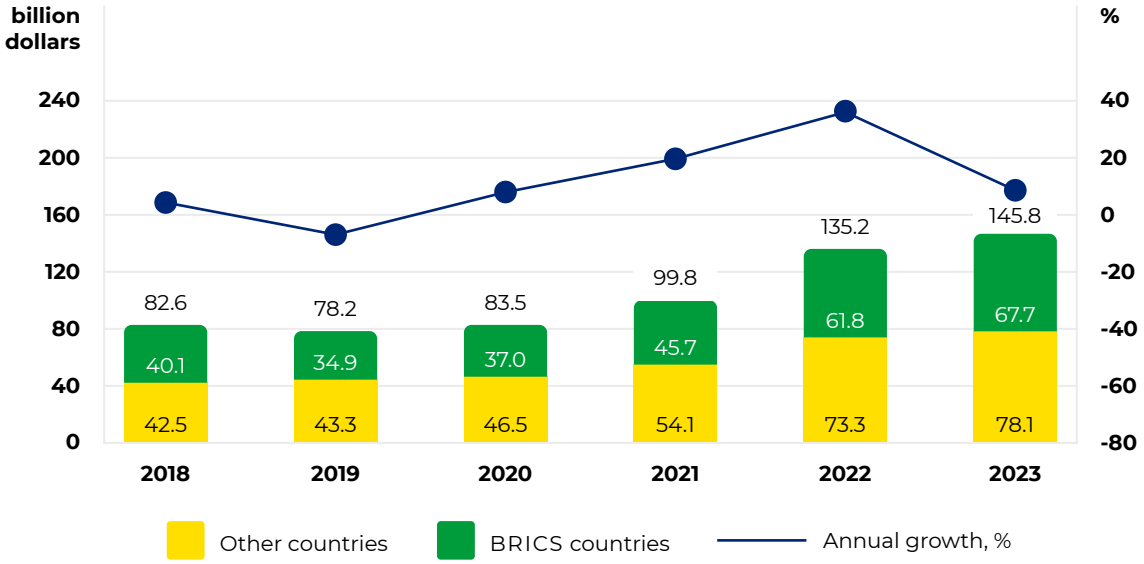
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	495.8	483.1	480.3	416.5	451.3	458.3	7.1	1.6
2	Russia	8.7	33.5	68.5	80.3	127.5	244.6	117.0	91.8
3	India	71.2	71.1	89.6	87.0	89.0	113.1	24.1	27.1
4	Egypt	35.3	19.2	52.3	42.5	33.4	77.3	43.9	2.3 times
5	South Africa	18.0	14.4	13.1	18.4	20.0	22.7	2.7	13.8
6	Iran	1.8	1.5	2.0	4.0	2.7	2.6	-0.1	-3.9
7	UAE	0.7	0.2	0.9	0.9	0.7	1.2	0.6	82.7
8	Saudi Arabia	0.003	0.01	—	0.01	—	0.03	0.03	—
9	Ethiopia	0.02	—	—	0.001	0.001	0.001	—	—
	Total BRICS	**631.6**	**623.0**	**706.7**	**649.4**	**724.5**	**919.8**	**195.3**	**27.0**
1	Argentina	3,232.1	3,290.3	3,072.2	3,741.5	4,069.2	3,209.0	-860.2	-21.1
2	Uruguay	580.5	662.1	747.0	832.1	996.5	1,447.8	451.3	45.3
3	Chile	1,051.7	1,033.6	878.0	1,103.5	1,349.8	1,409.6	59.9	4.4
4	Paraguay	534.7	663.5	932.1	1,433.3	1,496.7	1,073.7	-423.0	-28.3
5	Portugal	479.8	497.2	478.8	463.3	518.0	614.5	96.6	18.6
6	USA	1,238.9	1,046.3	949.8	558.7	658.6	456.6	-201.9	-30.7
7	Italy	258.7	249.2	252.1	267.9	304.0	384.7	80.7	26.5
8	Indonesia	284.5	215.0	270.5	567.2	646.3	383.8	-262.4	-40.6
9	Spain	268.5	298.3	229.9	267.0	291.0	312.1	21.2	7.3
10	France	188.1	181.7	185.1	214.4	212.9	276.6	63.8	29.9
	Other countries	2,302.2	2,188.1	2,067.1	2,470.6	2,680.0	2,841.4	161.4	6.0
	Total non-BRICS	**10,419.7**	**10,325.3**	**10,062.6**	**11,919.7**	**13,222.9**	**12,410.0**	**-812.9**	**-6.1**
	Total	**11,051.2**	**10,948.3**	**10,769.3**	**12,569.1**	**13,947.4**	**13,329.9**	**-617.5**	**-4.4**

Source: ITC Trade Map

2.1.3.2. Export of agricultural products

Export of Brazilian agricultural products in 2023 amounted to 145.8 billion US dollars, which is 7.9% (+10.6 billion US dollars) higher than in 2022. In 2023 export to the BRICS countries increased by 9.5% (+5.8 billion US dollars), export to other countries increased by 6.5% (+4.8 billion US dollars). For 2018-2023 Brazilian agricultural export increased at an average annual rate of 12.0%.

Export of agricultural products of Brazil, 2018-2023, billion US dollars



Source: ITC Trade Map

The main export product of the agro-industrial complex of Brazil in 2023 was soybeans (36.5%). A significant share of export also fell on beet and cane sugar (10.8%), corn (9.3%), as well as soybean cake and meal (7.9%). In total the top 10 exported types of products accounted for 88.0% of the value of Brazilian agricultural export.

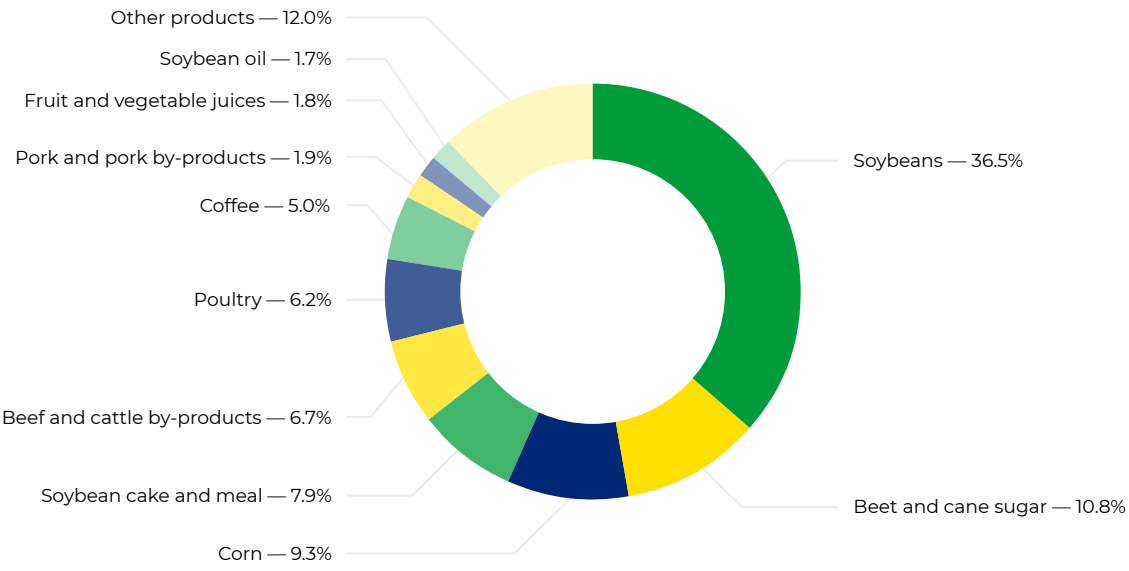
Export structure of Brazilian agricultural products in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	33,190.8	26,117.5	28,564.2	38,638.7	46,664.3	53,240.7	6,576.4	14.1
2	Beet and cane sugar	6,525.8	5,245.5	8,744.2	9,186.4	11,003.8	15,746.9	4,743.1	43.1
3	Corn	4,109.9	7,421.4	5,853.0	4,188.8	12,264.1	13,626.6	1,362.5	11.1
4	Soybean cake and meal	6,697.4	5,825.9	5,909.2	7,342.7	10,339.5	11,558.8	1,219.3	11.8

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
5	Beef and cattle by-products	5,855.1	6,888.6	7,774.0	8,318.1	12,100.5	9,800.4	-2,300.1	-19.0
6	Poultry	6,008.5	6,412.9	5,554.5	6,953.5	8,888.1	8,970.9	82.8	0.9
7	Coffee	4,371.3	4,553.6	4,996.3	5,833.3	8,542.5	7,350.5	-1,192.0	-14.0
8	Pork and pig by-products	1,164.9	1,555.2	2,227.4	2,592.5	2,523.4	2,765.9	242.5	9.6
9	Fruit and vegetable juices	2,352.2	2,110.1	1,603.3	1,865.4	2,231.7	2,678.7	447.0	20.0
10	Soybean oil	1,025.4	696.1	761.4	2,016.7	3,946.1	2,517.2	-1,428.9	-36.2
	Other products	11,283.8	11,410.0	11,498.9	12,884.5	16,659.3	17,518.4	859.1	5.2
	Total	**82,585.0**	**78,236.8**	**83,486.4**	**99,820.6**	**135,163.3**	**145,775.0**	**10,611.7**	**7.9**

Source: ITC Trade Map

Export structure of Brazilian agricultural products in value terms, 2023, %



Source: ITC Trade Map

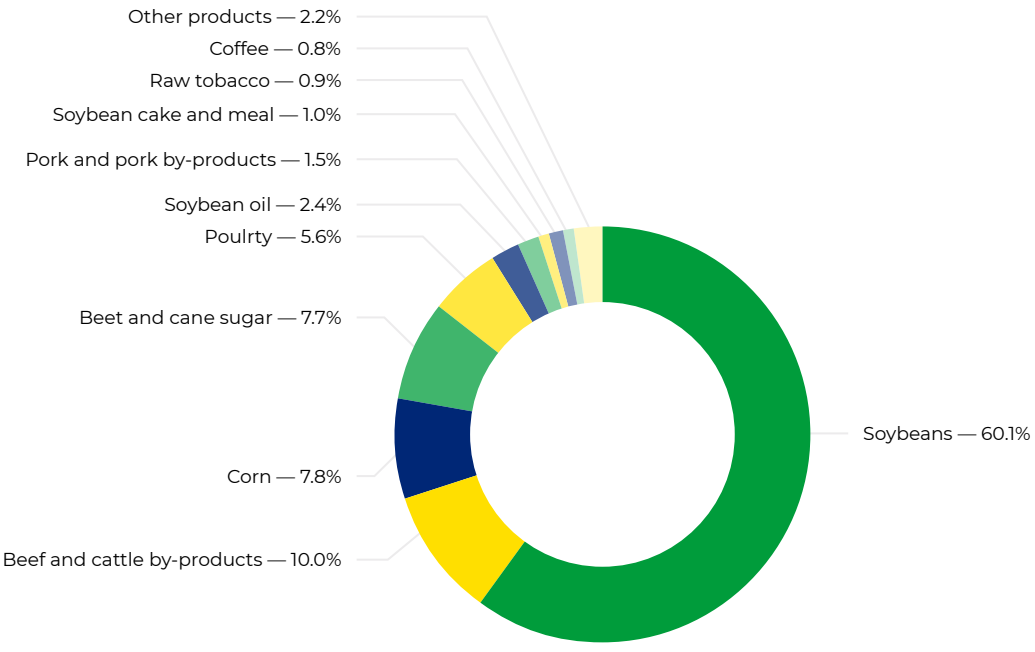
The main export products of Brazil's agro-industrial complex to the BRICS countries in 2023 were soybeans (60.1%), beef and cattle by-products (10.0%), corn (7.8%), as well as beet and cane sugar (7.7%). In total the top 10 exported products accounted for 97.8% of the value of Brazilian agricultural export.

Export structure of Brazilian agricultural products to the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	28,476.7	21,518.6	21,658.3	28,336.9	34,534.0	40,699.4	6,165.4	17.9
2	Beef and cattle by-products	2,643.8	3,996.8	4,972.0	4,759.5	8,953.6	6,742.9	-2,210.6	-24.7
3	Corn	1,574.6	1,718.4	1,450.2	1,468.9	3,772.0	5,283.6	1,511.6	40.1
4	Beet and cane sugar	2,039.2	1,667.5	2,864.4	2,959.2	3,890.8	5,238.8	1,348.0	34.6
5	Poultry	2,556.1	2,933.5	2,691.1	3,056.6	3,530.1	3,813.3	283.3	8.0
6	Soybean oil	727.9	406.8	400.1	1,390.2	2,816.8	1,619.8	-1,197.0	-42.5
7	Pork and pig by-products	357.2	739.8	1,295.7	1,408.9	1,193.6	1,001.1	-192.5	-16.1
8	Soybean cake and meal	295.2	338.5	113.6	365.3	581.1	650.0	68.9	11.9
9	Raw tobacco	379.1	531.6	290.1	283.6	598.2	626.2	28.0	4.7
10	Coffee	139.4	152.6	204.0	252.1	303.1	519.9	216.8	71.5
	Other products	880.9	919.1	1,030.8	1,402.3	1,657.8	1,485.5	-172.4	-10.4
	Total	**40,070.2**	**34,923.2**	**36,970.4**	**45,683.7**	**61,831.0**	**67,680.5**	**5,849.5**	**9.5**

Source: ITC Trade Map

Export structure of Brazilian agricultural products to the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

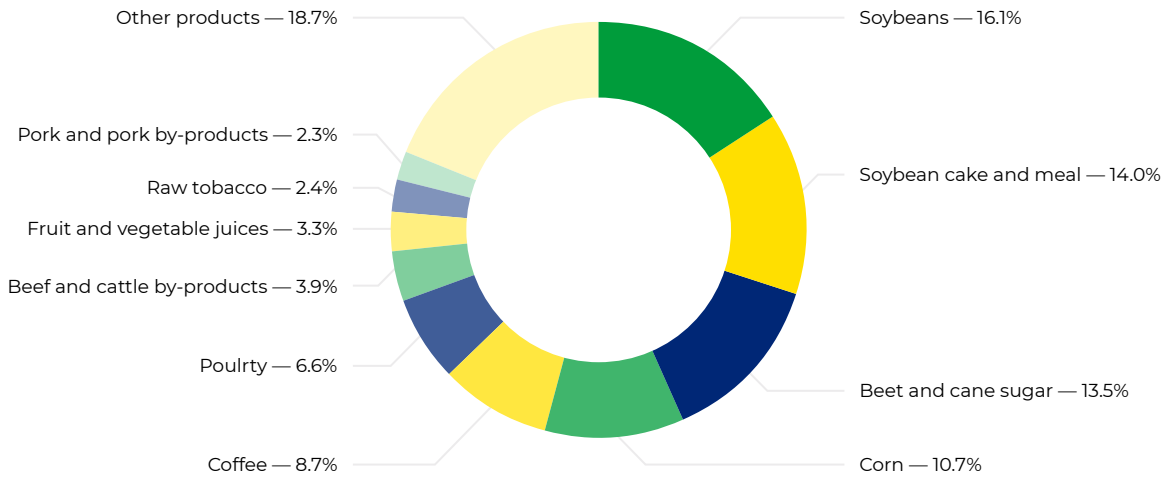
The main export products of Brazil's agro-industrial complex to other countries in 2023 were soybeans (16.1%), soybean cake and meal (14.0%), beet and cane sugar (13.5%) and corn (10. 7%). In total the top 10 exported products accounted for 81.3% of the value of Brazilian agricultural export.

Export structure of Brazilian agricultural products to other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	4,714.2	4,599.0	6,905.8	10,301.8	12,130.4	12,541.3	410.9	3.4
2	Soybean cake and meal	6,402.1	5,487.4	5,795.7	6,977.4	9,758.4	10,908.8	1,150.4	11.8
3	Beet and cane sugar	4,486.5	3,578.1	5,879.7	6,227.2	7,113.0	10,508.1	3,395.1	47.7
4	Corn	2,535.2	5,703.0	4,402.8	2,719.9	8,492.0	8,342.9	-149.1	-1.8
5	Coffee	4,231.9	4,400.9	4,792.3	5,581.1	8,239.4	6,830.7	-1,408.8	-17.1
6	Poultry	3,452.4	3,479.3	2,863.4	3,896.9	5,358.1	5,157.6	-200.4	-3.7
7	Beef and cattle by-products	3,211.3	2,891.8	2,802.0	3,558.6	3,146.9	3,057.4	-89.5	-2.8
8	Fruit and vegetable juices	2,261.3	2,022.0	1,531.5	1,751.1	2,121.8	2,545.5	423.7	20.0
9	Raw tobacco	1,470.2	1,458.7	1,182.2	1,026.0	1,638.1	1,854.2	216.1	13.2
10	Pork and pig by-products	807.7	815.4	931.7	1,183.6	1,329.8	1,764.8	435.0	32.7
	Other products	8,941.9	8,878.0	9,428.9	10,913.3	14,004.4	14,583.1	578.8	4.1
	Total	**42,514.8**	**43,313.6**	**46,516.0**	**54,136.9**	**73,332.3**	**78,094.5**	**4,762.2**	**6.5**

Source: ITC Trade Map

Export structure of Brazilian agricultural products to other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest importers of Brazilian agricultural products were China (37.3% of export in value terms), Saudi Arabia (1.9%) and India (1.9%). The BRICS member countries collectively accounted for 46.4% of Brazil's agricultural export.

Also among the largest importing countries in 2023 were the United States (4.0% of export in value terms), the Netherlands (3.0%) and Japan (2.7%). In total the top 10 importing countries accounted for 59.6% of Brazilian agricultural export in 2023.

The main importing countries of agricultural products from Brazil in value terms, 2018–2023, million US dollars

№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	30,899.2	26,297.4	29,439.7	36,375.3	45,759.6	54,325.2	8,565.6	18.7
2	Saudi Arabia	1,696.0	1,683.3	1,596.7	1,734.2	2,594.3	2,838.9	244.6	9.4
3	India	1,152.2	588.6	817.3	1,116.1	2,746.7	2,757.2	10.5	0.4
4	Iran	2,191.6	2,208.2	1,155.6	1,938.0	4,296.1	2,299.9	-1,996.2	-46.5
5	UAE	1,271.9	1,191.5	1,120.1	1,413.3	1,960.1	2,106.2	146.1	7.5
6	Egypt	1,431.8	1,402.9	1,387.1	1,496.6	2,211.6	1,653.6	-558.0	-25.2
7	Russia	1,032.6	1,243.8	1,139.2	1,231.6	1,804.8	1,239.5	-565.3	-31.3
8	South Africa	391.8	304.4	312.6	377.1	456.5	459.4	2.8	0.6
9	Ethiopia	3.1	3.0	2.1	1.5	1.3	0.7	-0.7	-49.8
	Total BRICS	**40,070.2**	**34,923.2**	**36,970.4**	**45,683.7**	**61,831.0**	**67,680.5**	**5,849.5**	**9.5**

№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	USA	3,535.8	3,760.3	3,640.0	4,660.1	5,497.8	5,894.7	396.9	7.2
2	Netherlands	3,545.0	3,109.8	3,521.2	3,939.1	5,084.2	4,372.2	-711.9	-14.0
3	Japan	1,792.4	2,988.4	2,248.0	2,262.6	3,791.3	3,887.6	96.3	2.5
4	Indonesia	947.3	802.4	1,476.3	1,563.3	2,610.4	3,335.8	725.4	27.8
5	Spain	1,699.2	1,933.0	2,000.3	2,855.3	4,495.9	3,200.6	-1,295.3	-28.8
6	South Korea	1,708.9	1,764.9	1,948.3	1,967.0	2,881.3	3,139.7	258.4	9.0
7	Thailand	1,430.4	1,261.4	1,732.5	2,407.3	3,115.4	3,044.0	-71.5	-2.3
8	Vietnam	1,270.5	1,307.7	1,499.9	1,685.6	2,449.5	2,974.2	524.7	21.4
9	Argentina	865.1	600.1	653.6	758.2	981.9	2,742.5	1,760.5	2.8 times
10	Germany	1,794.6	1,745.0	1,816.3	1,939.6	3,071.1	2,411.9	-659.2	-21.5
	Other countries	23,925.6	24,040.4	25,979.6	30,098.8	39,353.5	43,091.3	3,737.8	9.5
	Total non-BRICS	**42,514.8**	**43,313.6**	**46,516.0**	**54,136.9**	**73,332.3**	**78,094.5**	**4,762.2**	**6.5**
	Total	**82,585.0**	**78,236.8**	**83,486.4**	**99,820.6**	**135,163.3**	**145,775.0**	**10,611.7**	**7.9**

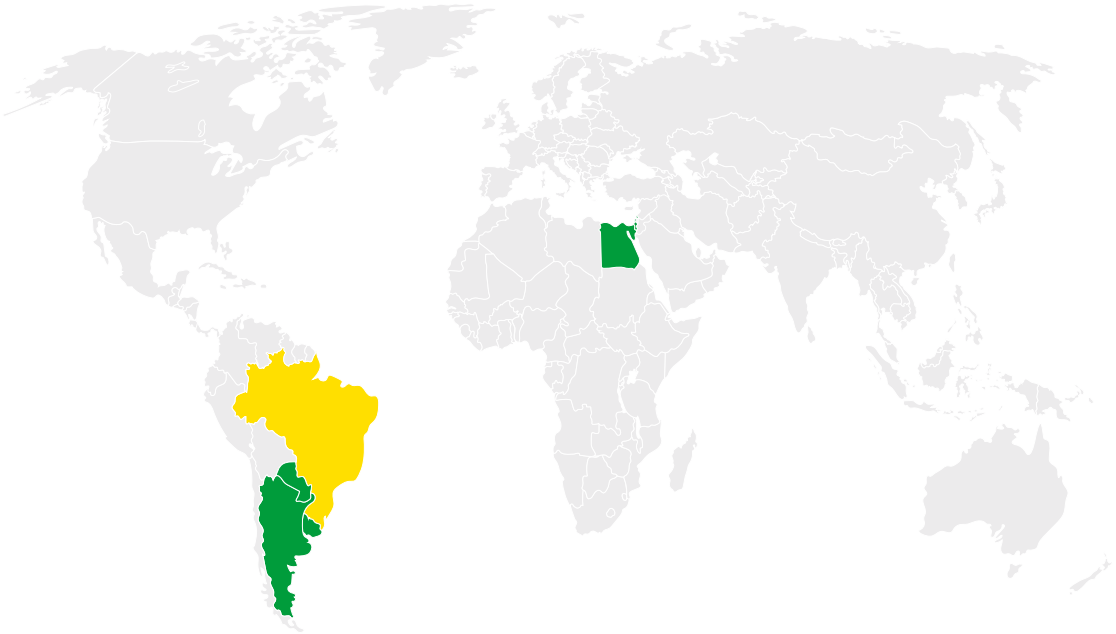
Source: ITC Trade Map

2.1.3.3. International cooperation

Brazil along with Argentina, Paraguay and Uruguay has been a member of the customs union of the Common Market of South America (MERCOSUR) since 1991.

As a member state of MERCOSUR the country participates in preferential trade agreements with Israel and Egypt.

Brazilian trade agreements



State/association with which Brazil has entered into a preferential trade agreement	Effective date of the agreement
MERCOSUR: Argentina, Brazil, Paraguay, Uruguay	1991
Israel (within MERCOSUR)	2009
Egypt (within MERCOSUR)	2017

2.1.3.4. Special economic zones

There are two types of special economic zones in Brazil: export production zones (EPZs) and free trade zones (FTZs).

FTEs use various incentives to attract investment at the federal and state levels. The national government provides incentives for the purchase of goods and services in the domestic market with respect to the federal excise tax, federal contributions levied on income, social security contributions as a percentage of income and incentives for the purchase of goods and services in the foreign market.

FTE residents conduct business activities under the same legal regime as national companies. For the support provided FTE residents must ensure that their export volume is at least 80% of total sales. Products sold on the domestic market are subject to the FTE taxation regime.

Brazil's most famous FTZ, Manaus, is located in the Amazon. It provides a range of tax and other incentives to attract and retain investment. The federal tax incentives of the Manaus FTZ are:

- reduction of import customs duty rates on raw materials, semi-finished products, packaging materials used in the production of industrial goods in the FTZ territory for subsequent sale in other regions of the country;
- exemption from excise duties;
- reduction of the income tax rate;
- tax exemption for imported goods intended for sale within the Manaus FTZ and the application of a reduced rate for the sale of finished products in other regions of the country, etc.

2.1.3.5. Institutes for supporting the export of agricultural products

Brazilian Trade and Investment Promotion Agency

Description	Founded in 1997 as a subsidiary of the micro and small business support organization SEBRAE. In 2003 the company became an autonomous non-profit organization funded by the private sector and controlled by the Brazilian federal government. The main aim of the agency is to promote Brazilian goods and services in foreign markets and attract foreign investment into the country's economy. One of its activities is hereby to support the export of agricultural products, as well as fertilizers, veterinary drugs and agricultural technologies
Main goals	• research and analysis of possible markets in order to provide public and private companies and partners with information about the best opportunities for business development abroad; • training and consulting for companies offered to improve the competitiveness of exported products. Training is provided in the field of international marketing, export (including to specific countries), promotion on e-commerce platforms, etc.; • facilitation of business missions of Brazilian companies and government delegations to countries most promising for export activities; • ensuring the participation of Brazilian companies in international exhibitions; • promotion of Brazilian products abroad and search for foreign partners and assistance in entering foreign markets; • attracting foreign investments
Contact details	**Address:** SAUN, Quadra 5, Lote C, Torre B, 12° a 18° andar Centro Empresarial CNC Asa Norte, Brasília — DF, 70040-250 **Tel.:** +55 61 2027 0202 **E-mail:** apexbrasil@apexbrasil.com.br **Website:** https://apexbrasil.com.br/br/pt.html

Confederação da Agricultura and Pecuária do Brazil, CNA

Description	Confederação da Agricultura and Pecuária do Brazil was created in 1964. The Confederation represents the interests of small, medium and large Brazilian agricultural producers. The CNA also includes the National Agricultural Training Service (SENAR), which offers vocational education, technical and managerial assistance and other support to Brazilian agricultural producers and the CNA Institute which conducts research in the social sector and agricultural business. In 2020 the CNA and the Bank of Brazil announced cooperation in lending to agricultural producers. In 2023 the CNA together with the ApexBrasil, the Sebrae, the National Industrial Confederation (CNI) and other government agencies launched the Brazilian Export Platform aimed at providing free foreign trade services for various types of companies
Main goals	• representing the interests of associations in the country and abroad; • providing access to information for companies operating in the agricultural sector about foreign markets, rules for importing goods, fairs and events to promote their products; • ensuring the participation of Brazilian agricultural producers in international exhibitions and business missions; • training and implementation of social initiatives in the field of export of agricultural products; • conducting scientific and applied research on technological solutions to improve the productivity of the agro-industrial complex
Contact details	**Address:** SGAN Quadra 601, Módulo K - Ed. Antônio Ernesto de Salvo Brasília - Distrito Federal **Tel.:** +55 61 2109 1400 **E-mail:** cna@cna.org.br **Website:** https://www.cnabrasil.org.br/

Expert opinion

Dmitry Krasnov

Director, Federal Centre "Agroexport"

Russia is actively developing its agriculture. In recent years, the Russian agro-industrial complex has achieved the goals of self-sufficiency in basic agricultural products, which allowed it to strengthen food security and expand supplies to foreign markets. Between 2017 and 2023 Russia's agricultural export doubled to 43.5 billion US dollars.

Currently, Russia is the largest supplier of wheat and frozen fish to the world market, ranks second in terms of sunflower and rapeseed oil export and third in terms of barley supplies. Russia acts as a guarantor of food security for many countries of the world.

The BRICS member states are important trade partners of Russia in the agro-industrial sector. The BRICS countries account for 35% of Russia's agricultural export. We supply our partners with wheat, sunflower and rapeseed oil, fish and seafood, meat, milk and ready-to-eat food products. A wide range of exported goods and positive dynamics of supplies allow us to work on further deepening of co-operation in the sphere of trade in agro-industrial products.

The development of trade makes it possible to increase the efficiency of use of land and water resources, strengthens ties between countries and ensures food security of members of the association. Joint efforts to ensure comfortable conditions for trading operations will make it possible to provide the population of our countries with high-quality and safe food products in the required volume.

2.2. Russia

2.2.1. Social and economic profile

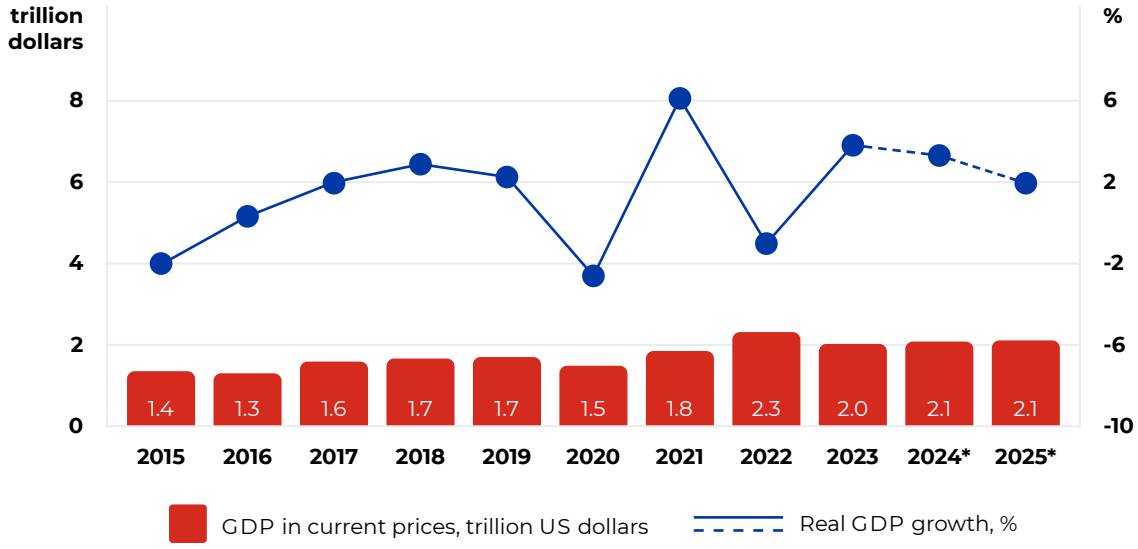
The Russian Federation (Russia) is the largest state in Europe in terms of population and the largest state in the world in terms of its land area. In 2023, according to the Russia Census Bureau (Rosstat), about 146 million people lived in the country; the level of urbanization was 75%. Russia is in the last phase of its demographic transition, characterized by stagnant population growth rates — since 2015, its population has varied between 146-147 million people.

The country covers more than 17 million km^2, of which about 2.1 million km^2 is arable land, which is caused by significant climatic differences characterizing the territory of Russia — a significant part of it is located in the permafrost zone. At the same time, the country also accounts for almost half of the global black soil area, which contributes to high rates of agricultural production.

In the structure of Russia's GDP, the share of agriculture is 3.9%, the industrial sector is 32.8%, and the service sector is 54.0%. 5.7% of the population is employed in agriculture, 26.6% in industry, and 67.8% in the service sector. Unemployment rate as of 2023, according to Rosstat, was 3.2% which is lowest figure since 1992. Agricultural products account for about 12.3% of Russian imports and 10.2% of exports.

Russia is one of the world's largest economies by nominal GDP and GDP by PPP. Nominal GDP in 2023 was 2.0 trillion US dollars, GDP by PPP — 5.2 trillion US dollars. The country's economy has demonstrated a high level of stability in the face of increasing sanctions pressure. The reduction in real GDP in 2022 was only 1.2%, and already in 2023 the increase was 3.6%. According to the IMF forecasts, in 2024 the growth rate will be 3.2% and will significantly exceed the rate expected in the largest developed economies.

Dynamics of Russian GDP in current prices, 2015-2025

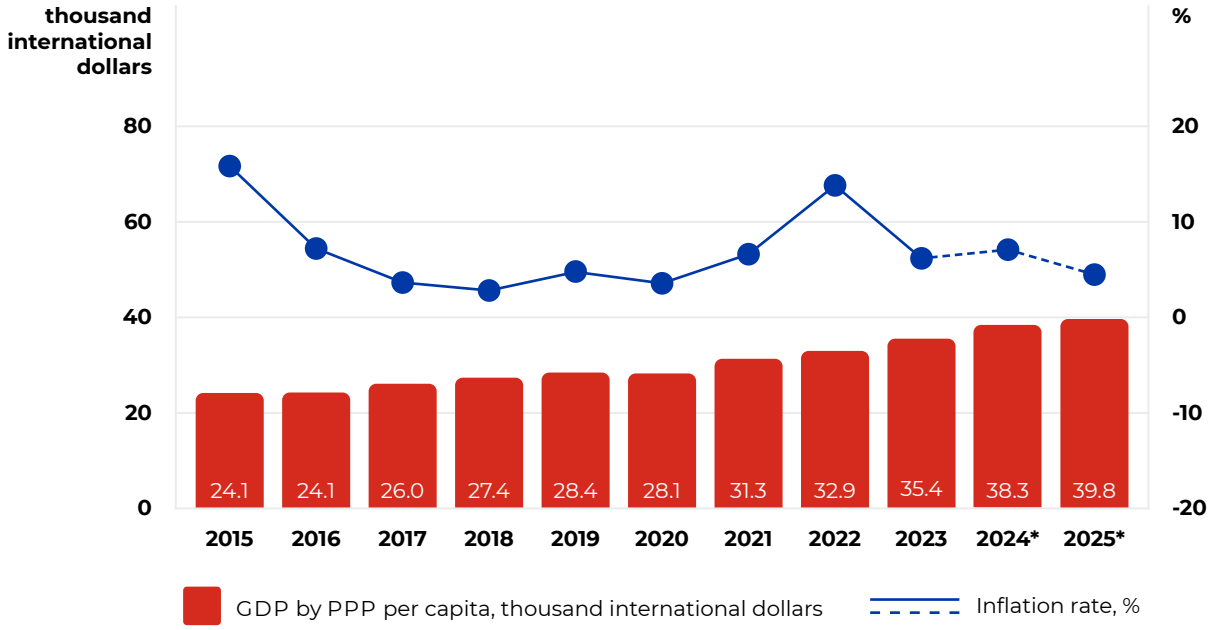


Source: IMF
*Note. *forecast, IMF data as of April 16, 2024.*

GDP by PPP per capita in Russia in 2023 amounted to 35.4 thousand international dollars. According to the IMF forecasts, in 2025 the figure may increase to 39.8 thousand international dollars.

The peak in consumer price growth caused by sanctions pressure occurred in 2022. According to the IMF, at the end of the year inflation amounted to 13.7% which resulted in a tightening of the monetary policy of the Central Bank of Russia. In March 2022 the key rate was set at 20.0%. The subsequent stabilization of price growth allowed the Central Bank to significantly soften its policy but another round of inflation in the second half of 2023 caused a repeated increase of the key rate. From December 2023 it is set at 16.0%. Currently, inflationary pressure is gradually eased but remains at a high level. The IMF predicts that by the end of 2024 inflation in Russia will be 6.9%. However, the tight monetary policy adopted by the Central Bank will further stabilize price increases and return inflation to the 4% target index.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

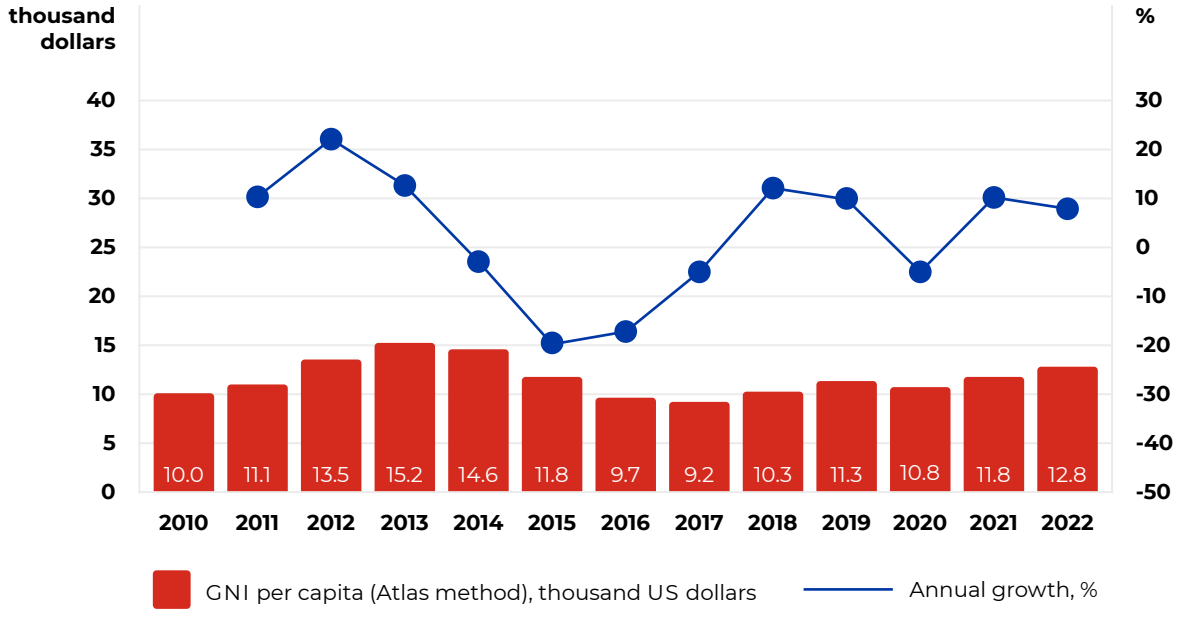


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, Russia is included in the group of countries with upper-middle income. In 2022 the figure was 12.8 thousand US dollars, an increase by 9.4% as compared to 2021.

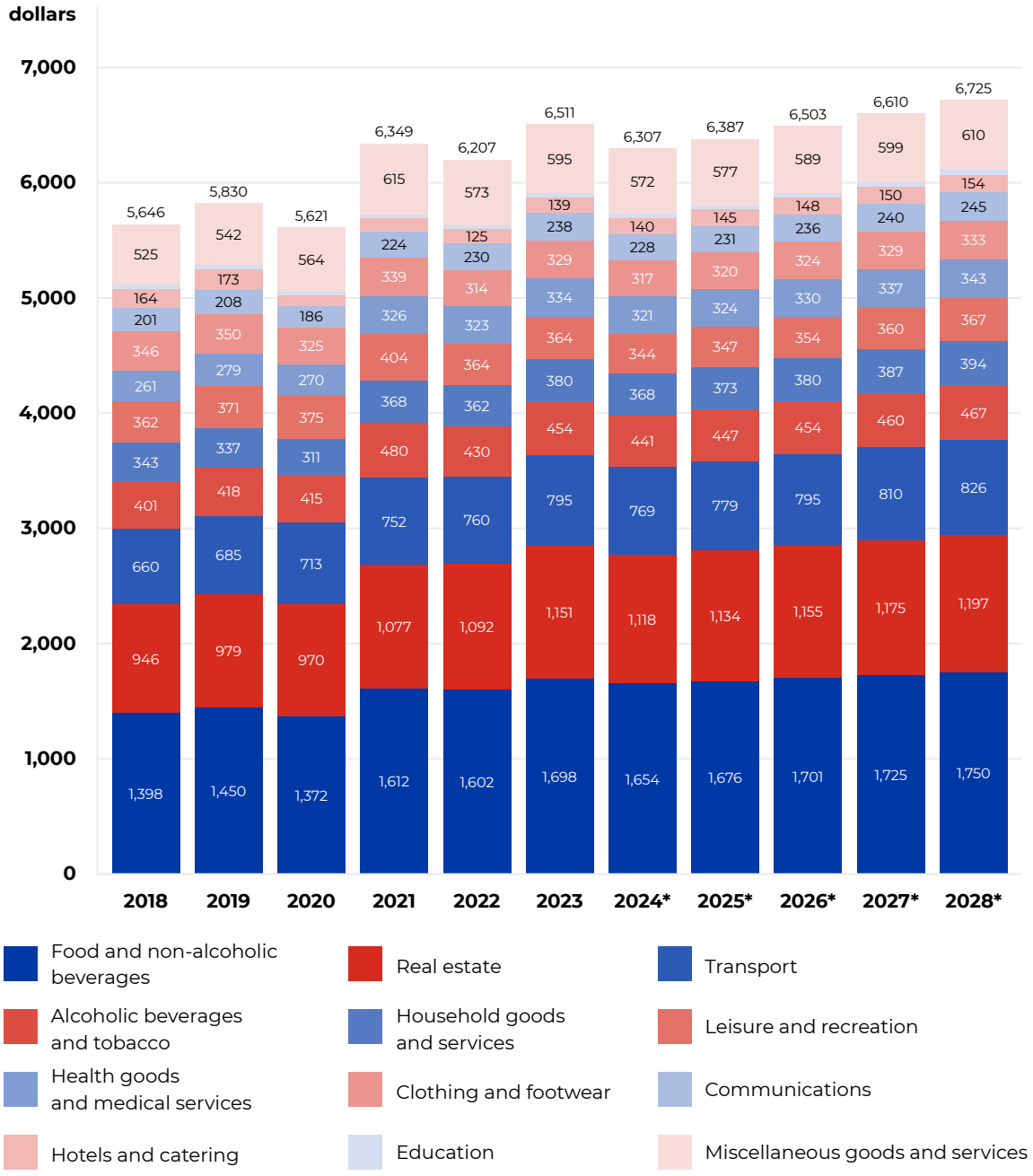
Dynamics of GNI per capita in Russia, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 amounted to 6,511 US dollars at constant 2023 prices, an increase of 4.9% as compared to 2022. Food and non-alcoholic beverages accounted for most spending — 26.1%. In 2028 final consumption expenditures are projected to reach 6,725 US dollars, of which food and non-alcoholic beverages will account for 26.0% (1,750 US dollars).

Final consumption expenditures in Russia per capita in constant prices 2023, 2018-2028, US dollars



Food and non-alcoholic beverages
Real estate
Transport
Alcoholic beverages and tobacco
Household goods and services
Leisure and recreation
Health goods and medical services
Clothing and footwear
Communications
Hotels and catering
Education
Miscellaneous goods and services

Source: Euromonitor International (Passport platform)
*Note. *forecast.*

2.2.2. Agriculture

2.2.2.1. Crop and livestock production

The Russian agricultural sector is one of the most rapidly developing segments of its economy. The country actively increases production and export of food products while becoming less and less dependent on import supplies.

Grain crops account for the majority of crop production. In 2023 the gross grain harvest amounted to 139.0 million tons, including 92.9 million tons wheat, 21.1 million tons barley and 16.6 million tons corn. Russia is one of the world's largest producers of grain crops. The country is also a leader in the production of sugar beets — in 2023 the gross harvest amounted to 53.1 million tons.

Production of vegetables, roots and tubers in 2023 amounted to 34.1 million tons with major share of potato production — 20.2 million tons. The most common vegetable crops are tomatoes and cabbage, whose gross harvests in 2023 amounted to 3.3 million tons and 2.2 million tons, respectively.

Gross harvests of oilseeds in 2023 reached 29.9 million tons. The majority of production came from sunflower seeds — 17.3 million tons. Russia is also actively increasing the gross harvest of soybeans — 6.8 million tons in 2023. Production of rapeseed amounted to 4.2 million tons. Among the leguminous crops, the most common is peas; its production amounted to 4.7 million tons in 2023.

Production of crop products, million tons

	2018	2019	2020	2021	2022	2023
Cereals	**109.8**	**117.9**	**130.0**	**117.6**	**153.0**	**139.0**
Wheat	72.1	74.5	85.9	76.1	104.2	92.9
Barley	17.0	20.5	20.9	18.0	23.4	21.1
Corn	11.4	14.3	13.9	15.2	15.8	16.6

	2018	2019	2020	2021	2022	2023
Sugar beet	**42.1**	**54.4**	**33.9**	**41.2**	**48.9**	**53.1**
Vegetables, roots and tubers	**36.1**	**36.2**	**33.5**	**31.0**	**32.5**	**34.1**
Potato	22.4	22.1	19.6	18.0	18.8	20.2
Tomatoes	2.9	3.0	3.0	3.1	3.3	3.3
Cabbage	2.5	2.6	2.7	2.2	2.3	2.2
Oilseeds	**19.5**	**22.8**	**21.2**	**24.9**	**29.1**	**29.9**
Sunflower seeds	12.8	15.4	13.3	15.7	16.4	17.3
Soybeans	4.0	4.4	4.3	4.8	6.0	6.8
Rapeseed seeds	2.0	2.1	2.6	2.8	4.5	4.2
Leguminous crops	**3.4**	**3.3**	**3.4**	**3.8**	**4.6**	**6.0**
Peas	2.3	2.4	2.7	3.2	3.6	4.7

Source: Rosstat, BRICS Joint Statistical Publication

Russia is also increasing its livestock. In 2023 dairy production amounted to 33.8 million tons. The vast majority of dairy production in Russia comes from cow's milk. The most common type of meat products is poultry — in 2023 the production of this type of products amounted to 5.3 million tons in carcass weight. Also in 2022 4.7 million tons of pork and 1.6 million tons of beef were produced in the country.

Most of the fish production comes from catching but the country is also developing aquaculture. The total production volumes in 2023 amounted to 5.8 million tons.

Livestock production

	2018	2019	2020	2021	2022	2023
Chicken egg, billion pcs.	44.90	44.86	44.91	44.89	46.11	46.65
Dairy, million tons	30.6	31.4	32.2	32.3	33.0	33.8
Poultry, million tons	5.0	5.0	5.0	5.1	5.3	5.3
Pork, million tons	3.7	3.9	4.3	4.3	4.5	4.7
Beef, million tons	1.6	1.6	1.6	1.7	1.6	1.6
Fish and seafood, million tons	5.3	5.3	5.3	5.4	5.3	5.8

Source: Rosstat, Federal Agency for Fishery of the Russian Federation (Rosrybolovstvo), BRICS Joint Statistical Publication

2.2.2.2. Overview of milestones in the agro-industrial complex

1990 Domestic policy

Establishment of the Ministry of Agriculture.

1991 Foreign policy

Foundation of the CIS and joining of Russia to the CIS.

1992 Foreign policy

Foundation and membership of Russia in the Organization of the Black Sea Economic Cooperation (BSEC).

1992 Foreign policy

Russia's membership at the IMF.

1993 Domestic policy

Adoption of Law N 4973-1 “On Grain”. The law defines the legal basis for the development of the grain complex of the Russian Federation, which is a set of types of agricultural and other activities related to the production, transportation, storage, handling, processing, sale and disposal of grain and grain processed products in the domestic and foreign markets.

2001 Foreign policy

Foundation and membership of Russia in the Shanghai Cooperation Organization (SCO).

2001 Foreign policy

Foundation and membership of Russia in the Eurasian Economic Community (EurAsEC).

2002 Domestic policy

Approval of the federal target program “Social development of rural areas until 2013”. The main goals of the program are to improve the level and quality of life of the rural population by increasing the level of development of social infrastructure and engineering development of settlements, creating legal, administrative and economic conditions for the transition to sustainable social and economic development of rural areas, improving the social and demographic situation in rural areas, expanding the labor market in rural areas and ensuring its attractiveness, increasing the prestige of living in rural areas.

2006 Domestic policy

The State Duma adopts the Federal Law N264-FZ “On the development of agriculture”. The law establishes the legal basis for the implementation of state social and economic policy in the field of agricultural development.

2007 Domestic policy

Approval of the concept for the development of agricultural sciences and research and development support of the Russian agro-industrial complex until 2025. The goal of the concept is the development of agricultural sciences, deepening fundamental and prioritized applied scientific research for the development of competitive scientific and technical products, defining an innovative mechanism for the participation of science in development and production of scientific research results, ensuring the efficient development of the agritech complex of the Russian Federation.

2007 Domestic policy

Approval of the State Program for the Development of Agriculture and Regulation of Markets for Agricultural Products, Raw Materials and Food for 2008-2012. The goals of the Program were: sustainable development of rural areas, increasing employment and living standards of the rural population, increasing the competitiveness of Russian agricultural products based on financial sustainability and modernization of agriculture, as well as on the basis of the accelerated development of prioritized sub-sectors of agriculture; conservation and reproduction of soils and other natural resources used in agricultural production.

2008 Domestic policy

Approval of the Concept of long-term social and economic development of the Russian Federation until 2020. Within the framework of the agricultural sector, the following goals were identified: meeting the needs of the population with Russian origin agricultural products and food, sustainable development of rural areas, increasing the standard of living of the rural population, increasing the competitiveness of the Russian agricultural complex, efficient import substitution in the livestock market and the creation of advanced export potential (especially in crops), improvement and increase in the productivity of land and other natural resources used in agricultural production.

2009 Foreign policy

Foundation of BRICS and membership of Russia in BRICS.

2010 Domestic policy

Approval of the Concept of Sustainable Development of Rural Areas of the Russian Federation until 2020. The purpose of the development is to identify key issues in the development of rural territories, including settlements with fishing specialization, and to develop the necessary social, economic, legal and administrative measures.

2010 Domestic policy

Approval of the Doctrine of Food Security of the Russian Federation until 2020.

2012 Domestic policy

Approval of the State Program for the Development of Agriculture and Regulation of Markets for Agricultural Products, Raw Materials and Food. The goals of the program by 2030 are aimed on increase of production of agricultural products and food items, increase wages for agricultural workers, as well as raise the volume of exports of agricultural products.

2012 Foreign policy

Russia's accession to the World Trade Organization (WTO).

2013 Domestic policy

Approval of the federal target program “Sustainable Development of Rural Areas for 2014-2017 and until 2020”. The goals of the program were aimed on creation of comfortable living conditions in rural areas, stimulation of investment activity in the agritech complex by creating favorable infrastructure conditions, promotion of creation of high-tech jobs in rural areas, enhancing the participation of citizens living in rural areas in the implementation of community projects, and creation of positive attitude towards countryside and rural lifestyle.

2013 Domestic policy

Approval of the federal target program “Development of Reclamation of Agricultural Lands in Russia for 2014 - 2020”. The goals of the program were to increase the productivity and sustainability of agricultural production and soil fertility through comprehensive reclamation against the backdrop of climate change and environmental fluctuations, to increase the productive potential of reclaimed lands and the efficient use of natural resources.

2014 Domestic policy

Approval of the State Program “Development of the Fishery Complex”, the main goals of which are the modernization of the fish processing sector and stimulation of the production of highly processed fish products, shaping and implementation of a mechanism for long-term and effective management of aquatic biological resources, the development of artificial reproduction of aquatic biological resources, ensuring the accelerated development of commercial aquaculture (fish farming), including mariculture.

2015 Domestic policy

Approval of the Strategy for Sustainable Development of Rural Territories of the Russian Federation until 2030. The Strategy is aimed at creating conditions for a stable quality of the improvement and standard of living of the rural population based on the advantages of the rural lifestyle.

2015 Foreign policy

Liquidation of the Eurasian Economic Community (EurAsEC) in connection with the beginning of the functioning of the Eurasian Economic Union (EAEU).

2016 Domestic policy

Approval of the project “Export of Agricultural Products”. The goal of the project is to create an industry-bound system for supporting and promoting the export of agricultural products and ensuring that Russian products comply with the requirements of regulatory authorities of target foreign markets.

2017 Domestic policy

Approval of the Federal Scientific and Technical Program for the Development of Agriculture for 2017 - 2030, the goals of which were to ensure import substitution and increase production efficiency in agriculture through the development and implementation of domestic innovative technologies and achievements, increasing their competitiveness based on the interaction of the state, science and business to implement the provisions of the Doctrine of Food Security of the Russian Federation.

2019 Domestic policy

Approval of the State Program “Comprehensive Development of Rural Territories”. The priorities of the Program are the creation of conditions for providing affordable and comfortable housing to the rural population, creation and development of infrastructure in rural areas, development of labor market (e.g. human resources) in rural areas.

2019 Domestic policy

Approval of a Long-term Strategy for the Development of the Grain Complex of the Russian Federation until 2035. The goal of the Strategy is the formation of a highly efficient, scientifically and innovation-oriented, competitive and investment-attractive balanced system of production, processing, storage and sale of basic grain and leguminous crops, correspondent processed products, providing for food security of the Russian Federation to fully satisfy the country's internal needs and create significant export potential.

2020 Domestic policy

Approval of the Doctrine of Food Security of the Russian Federation.

2021 Domestic policy

Approval of the State Program for the efficient circulation of agricultural lands and the development of the reclamation complex of the Russian Federation. Priorities of the program are as follows: restoring and increasing the fertility of agricultural land, preventing a reduction in the area of agricultural land, rational use of such land, protecting and preserving agricultural land from water and wind erosion and desertification; improving the turnover of agricultural land; expansion of agricultural crops at the expense of unused arable land.

2021 Domestic policy

Approval of the Strategy for the Social and Economic Development of the Russian Federation with Low Greenhouse Gas Emissions until 2050. The Strategy defines measures to ensure a reduction in greenhouse gas emissions by 2030 to 70% as compared to levels in 1990 taking into account the maximum possible carbon capture capacity of forests and other ecosystems and subject to sustainable and balanced social and economic development of the Russian Federation, and also outlines the directions and measures of development with low greenhouse gas emissions until 2050.

2022 Domestic policy

Approval of the Development Strategy of the Agro-Industrial and Fishery Complexes of the Russian Federation up to 2030. The purpose of its development and implementation is to ensure long-term and sustainable development of the Russian agro-industrial and fishery complexes, import substitution of critical types of agricultural products, strengthening food security, development of new export directions, efficient land management agricultural purposes, including promotion of circulation, restoration of fertility of arable lands, as well as digital transformation, taking into account current foreign policy and economic risks.

2.2.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

According to the Food Security Doctrine of the Russian Federation, the country's independence from imported agricultural products, raw materials and food is one of the main areas of ensuring national security. Special attention is paid to import substitution of seed material. As part of the implemented doctrine, by 2030 it is planned to achieve self-sufficiency in domestically selected seed materials of the main agricultural crops at a level of at least 75%.

Taking into account the Doctrine of Food Security and the Strategy for Scientific and Technological Development, the Russian Government adopted the Federal Scientific and Technical Program for the Development of Agriculture for 2017-2030. The program itself includes sub-programs focusing on the development of potatoes, sugar beets, corn, oilseeds, industrial crops, grains and vegetable crops breeding and their seed industry development. In addition, the program facilitates financing and preferential lending for domestic crop breeders. From 2023, the amount of reimbursement for capital costs for the construction of crop breeding and seed centers has been increased. In addition, demand for seeds produced as part of the scientific and technical program is stimulated.

Development of agricultural export

Over 2017-2023 the Russian Federation has doubled the supply of the agricultural products to foreign countries and in 2023 the export volume exceeded 43 billion US dollars. Export shipments include more than 150 countries. Currently, Russia ranks first in wheat and frozen fish export, second in sunflower and rapeseed oil export and third in the world barley market. The country is among the largest exporters of soya oil and corn. Due to positive dynamics, export has become the main growth driver for most sectors of the agro-industrial complex.

Sustainable development of agriculture

Currently, there is a gradual transition in Russian agriculture from a model of exporting raw materials to a model of their deep processing within the country. In addition, there is an update of the technological base of agricultural enterprises and the use of low-carbon technologies. The above factors will ensure increased competitiveness and sustainability of Russian agricultural products.

A number of programs and strategies are being implemented in agriculture and forestry as part of the sustainable development of agriculture in the Russian Federation; in particular the Strategy for the Sustainable Development of Rural Areas until 2030 and the Strategy Social and Economic Development with Low Greenhouse Gas Emissions until 2050. Special attention is paid to measures to reduce air emissions, such as the wider use of slow-release mineral fertilizers, which dissolve and release nitrogen at a slower pace than the traditional nitrogen fertilizers, and the use of regenerative technologies that increase yields and promote

more intensive capturing of residual carbon, as well as the development of targeted selection, which would facilitate for breeding of livestock with a lower level of methane emissions generated as a result of its vital activity.

One of the priorities of the country's maritime activities is to ensure environmental safety of the marine environment, preservation and restoration of marine ecosystems. Active monitoring of the state and pollution of the marine environment to achieve these goals and comprehensive measures to prevent and eliminate the consequences of its pollution are carried out backed up by the replenishment of the Russian fleet with specialized vessels for environmental protection activities and special-purpose underwater activities. Special attention is paid to increasing the level of environmental protection through the transition of domestic sea vessels to environmentally friendly fuels, compliance with environmental requirements when implementing investment projects related to the development of maritime transport, construction of new and reconstruction of existing facilities for wastewater treatment, processing and disposal of ship waste.

Development of the “Blue Economy” — fish and seafood

Russia is a major producer of fish and aquaculture. The importance of the fishery complex is enshrined in the Maritime Doctrine of the Russian Federation. According to the document, the development of the resources of the oceans is a necessary and even mandatory condition for expanding the raw material base of the Russian Federation and ensuring its economic and food security. Among the priority areas for the development of fisheries and aquaculture, the following stand out: the development of aquaculture and mariculture, including the artificially supported breeding of environmentally friendly aquatic biological resources, the development and use of modern technologies for breeding and growing fish and non-fish objects, including the creation of innovative bio-technoparks, the development and implementation of a national environmental system certification of extracted aquatic biological resources and fish and other products derived from them.

E-commerce development

The volume of the Russian e-commerce market has shown stable growth rates over the past 10 years. In 2023 sales in the sector increased by almost 30% compared to 2022. The vast majority of sales were in the domestic market. Despite maintaining the leading positions behind Moscow and St. Petersburg in terms of online sales, there was an increase in the share of regions. This dynamic is explained by the rapid development of partner pick-up points, servicing both marketplaces and classic online stores. E-commerce companies are actively investing in the development of their local logistics infrastructure and developing partnerships with local businesses. Food products remained in the top five best-selling products in the e-commerce sector in the product structure of Russia at the end of 2023.

2.2.2.4. Key agricultural producers

The largest owners of agricultural land in Russia (as of May 2023)[2]

Miratorg

Activities	Production, processing, distribution, export, retail
Industry	Meat, grain, oil and fat, animal feed, ready-to-eat products
Description	A systemically important Russian agro-industrial company, founded in 1995, is one of the leaders in the meat industry. The company is a vertically integrated full-cycle enterprise. The company's activities include production and processing of meat and poultry, crop production, production of processed and packaged products, beverages and animal feed, management of retail chains and catering networks, distribution and export. The company's products are supplied to more than 30 countries. The company strives to constantly improve production technologies, quality control and expand the range of products to meet the needs of consumers in the Russian and the global market. The company controls the entire process of product creation — “from field to counter”
Contact Information	**Address:** Moscow region, Domodedovo, Tsentralny microdistrict, territory "Trio-Invest"-Yam, building 3, floor 3, room 25 **Tel.:** +7 495 651 92 52 **E-mail:** info@agrohold.ru **Website:** www.miratorg.ru

Agrocomplex named after N.I. Tkachev

Activities	Production, processing, distribution, export, retail
Industry	Grain, meat, dairy, animal feed, ready-to-eat products, drinks
Description	Agrocomplex named after N.I. Tkachev is one of the leading companies in Russia in terms of agricultural land area, dairy, sugar and meat production. The company's activities include: livestock, poultry farming, crop production, meat processing, animal feed production, commodity production, domestic and export trade. The company was founded in 1993 as a result of the merger of the Voskhod feed mill and feedlot. The geography of the company's export supplies covers more than 10 countries in the Middle East, Asia and Africa. The company manages 71 livestock farms, the holding includes 10 large modern poultry factories and total area of agricultural land reaches more than 763 thousand hectares. The company has also built one of the most developed distribution networks with a cargo transportation volume of more than 1,300 tons of products per day
Contact Information	**Address:** Krasnodar region, st. Vyselki, st. Stepnaya, 1 **Tel.:** +7 800 250 06 90 **E-mail:** info@agrokomplex.ru **Website:** https://agrokomplex.ru

[2] According to BEFL: https://www.befl.ru/upload/iblock/61d/61ddd322468d1cd4f56f38f05780dc76.pdf

ПРОДИМЕКС Prodimex Group

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, grain, sugar, animal feed
Description	Prodimex Group, founded in 1992, has a vertically integrated structure and operates in the agricultural and food industries. In 1992 the company began operations as a trading company specializing in the import of white sugar and processing of raw sugar. Within five years, Prodimex Group has taken a leading position in this segment. The company's activities cover the full cycle from growing crops to releasing final products. Prodimex Group has a land bank with an area of over 900 thousand hectares in eight regions of Russia. Its agricultural enterprises grow wheat, barley, peas, corn, sunflower, rapeseed, soy, flax and sugar beet. The company has 10 own elevators. The total storage volume of grains, legumes, and oilseeds is more than 1 million tons. The volumes of sugar beet cover a significant part of the needs of 14 sugar factories that are part of the Group
Contact Information	**Address:** Moscow region, g.o. Krasnogorsk, ter. highway "Baltia", 26th km, no. 5, building 3, BC "Riga Land" **Tel.:** +7 495 933 44 00 **E-mail:** office@prodimex.ru **Website:** https://prodimex.ru/

РУСАГРО Группа Компаний Rusagro Group

Activities	Production, processing, distribution, export
Industry	Oil and fat, meat, sugar, grain
Description	Rusagro Group is the largest vertically integrated agricultural holding in Russia, founded in 1995, which occupies a leading position in sugar production, pork farming, crop production and fat and oil business. Land bank of the Group — 685 thousand hectares. The main assets are located in the Belgorod, Tambov, Voronezh, Kursk, Orel, Sverdlovsk, Samara, Ulyanovsk, Saratov, Orenburg, Nizhny Novgorod, Volgograd, Tula regions, the Republic of Bashkortostan and the Primorsky Territory ensuring regional business diversification. Currently, Rusagro Group sells products in more than 80 regions of Russia and more than 50 countries
Contact Information	**Address:** Moscow, st. Valovaya, 35, 5th floor, room 256 **Tel.:** +7 495 363 16 61 **E-mail:** rusagrogroup@rusagrogroup.ru **Website:** www.rusagrogroup.ru

EkoNiva

Activities	Production, processing, distribution, export
Industry	Dairy, legumes, seeds, ready-to-eat products
Description	EkoNiva Group of Companies was founded in 1994 and currently consists of independent holdings covering various areas of agricultural and manufacturing activities. EkoNiva-APK is the largest producer of raw milk in Russia and Europe. The main activity is dairy farming. It also develops crop production, crop breeding and seed production, livestock breeding and organic production. EkoNiva-Produkty Pitania unites enterprises that process milk from its own farms. The company produces natural dairy products using the “from field to counter” principle. EkoNivaTekhnika-Holding supplies and services agricultural and road construction equipment, as well as equipment from major domestic and foreign manufacturers. The company is one of the leaders in the special equipment market with a developed network of service centers in 25 regions of Russia. EkoNiva-Semena is the largest producer of field crop seeds in Russia based on one agricultural holding. Every year the company sells about 80 thousand tons of certified seeds with high genetic potential. Its varietal portfolio is represented not only by the best exported genetics, but also by the most popular varieties of domestic crop breeding products. Since 2015 the company has been developing its own breeding programs
Contact Information	**Address:** Voronezh, st. F. Engelsa, 33A **Tel.:** +7 473 267 97 77 **E-mail:** apk@ekoniva-apk.com **Website:** www.ahstep.ru

STEPPE Agroholding

Activities	Production, processing, distribution, export
Industry	Grain, meat, dairy, animal feed, ready-to-eat products
Description	STEPPE Agroholding is one of the largest agricultural companies in the south of Russia, which unites a number of promising agricultural enterprises. The assets are located in the most favorable regions in terms of climate, productivity and logistics: Krasnodar Territory, Stavropol Territory, Rostov Region. The Agroholding develops business in four key areas: crop production, dairy, intensive horticulture and trade in agricultural products. Today the total land bank of the company is 578 thousand hectares, including the land bank of RZ Agro (subsidiary) — 110 thousand hectares. The dairy farming segment of the Agroholding is represented by seven technologically advanced dairy complexes in the Krasnodar and Stavropol Territories. The company's elevator complex is represented by four elevators located in the Rostov region. The total simultaneous storage capacity is 500 thousand tons
Contact Information	**Address:** Rostov-on-Don, Soborny lane, 19 **Tel.:** +7 863 309 07 10 **E-mail:** info@ahstep.ru **Website:** www.ahstep.ru

БИО·ТОН BIO-TON AGRI CORP.

Activities	Production, processing, distribution, export
Industry	Grain, legumes, oil and fat, animal feed
Description	One of the largest Russian agricultural producers with a land bank of more than 550 thousand hectares in the Volga Federal District, founded in 2004. The BIO-TON is the largest sunflower producer in the country, a pioneer in the implementation of precision farming systems and modern resource-saving technologies. The company produces more than 1 million tons of products and manages a fleet of agricultural machinery consisting of 1,900 units. The company's land assets are located in the Samara, Saratov, Ulyanovsk, Penza and Volgograd regions and the Stavropol Territory. The main cultivated crops are sunflower, wheat, barley, peas, chickpeas, corn, and buckwheat. In 2022 the company began to develop seed breeding to provide the company with own seed material, opening a plant in the Bezenchuksky district, with a total capacity of 86 thousand tons of seeds of grains, legumes and oilseeds
Contact Information	**Address:** Samara, Moskovskoe highway, 4, building 4 **Tel.:** +7 846 277 77 27 **E-mail:** office@bioton-agro.ru **Website:** https://bioton-agro.ru

АГРОИНВЕСТ Agroinvest Group

Activities	Production, processing, distribution, export
Industry	Grains, oil and fat, fruits and vegetables, meat
Description	Agroinvest Group is a Russian agricultural holding, formed in 2017 as a result of the merger of three companies. In a short period of its existence, the company has come a long way in its development: today it is one of the largest companies in the country by the size of agricultural land. The company's land bank is 450 thousand hectares. The company operates in seven regions of Russia — Volgograd, Lipetsk, Tambov, Kursk, Voronezh, as well as in the Ryazan and Samara regions. The main activity is crop production — wheat, barley, corn, sunflower, soybeans, chickpeas, rapeseed, open ground vegetables; a horticultural project is being implemented to grow apples, blueberries, raspberries and strawberries; the company is engaged in livestock farming in the Stanovlyansky district of the Lipetsk region
Contact Information	**Address:** Moscow, 1st Tverskaya-Yamskaya st., 21, Business Center “Four Winds” **Tel.:** +7 495 232 67 72 **E-mail:** info@agroinvest.com **Website:** www.agroinvest.com

JSC "Avangard-Agro"

Activities	Production, processing, distribution, export
Industry	Grains, oil and fat, processed products, dairy
Description	JSC "Avangard-Agro" founded in 2003, which is currently among the top 10 Russian companies by agricultural land size. The company's land bank is 447 thousand hectares. The main areas of activity are crop production and malt production; meat and dairy farming is also developing. The company operates in the Voronezh, Oryol, Kursk, Tula, Belgorod and Lipetsk regions. The products of JSC "Avangard-Agro" are marketed by the trading company Avangard-Agro-Trade. The holding supplies grain products to consumers both in Russia and abroad. The company also manages one of the largest fleets of modern equipment, including more than 2,000 harvesters and tractors, 1,630 vehicles for efficient distribution of goods. In total, the company employs more than 4,200 employees
Contact Information	**Address:** Moscow, st. Bratislavskaya, 18, building 1 **Tel.:** +7 495 730 02 20 **E-mail:** press.agro@avangard-agro.ru **Website:** https://avangard-agro.ru

JSC "Sibagro"

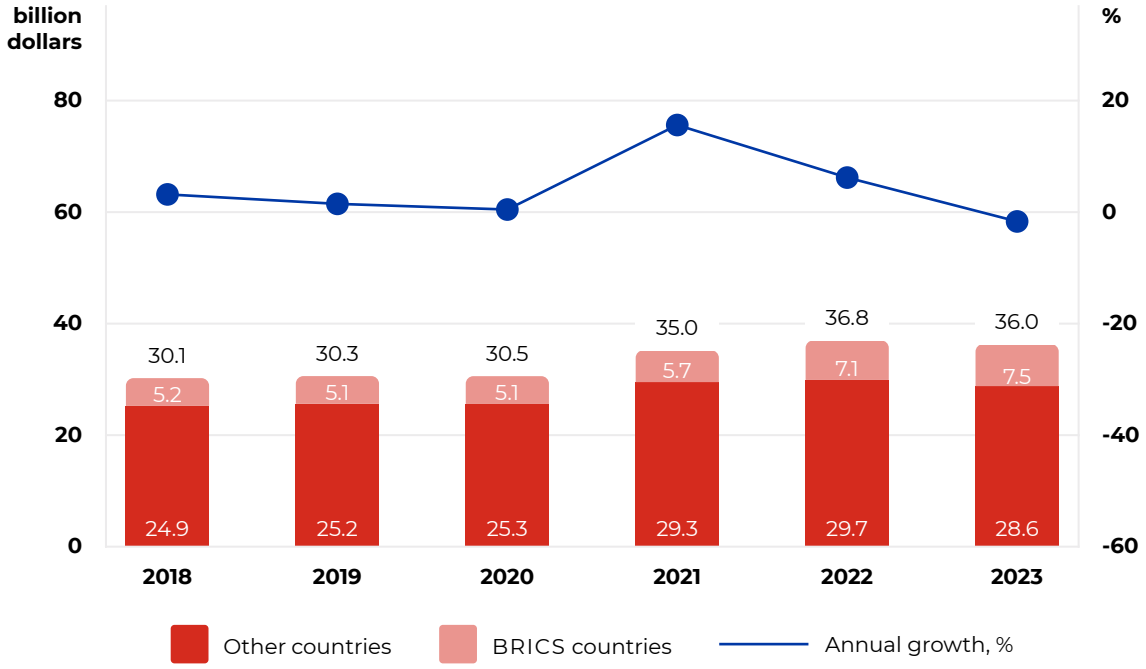
Activities	Production, processing, distribution, export
Industry	Meat, grain, animal feed, finished products
Description	JSC "Sibagro" is an integrated agro-industrial holding with a full production cycle, founded in 2000. The main activities are pig breeding, processing and sale of meat, poultry farming and egg production. The company operates in 10 regions of Central Russia, Siberia, the Urals and the Far East. The holding's enterprises are geographically located in various geographical areas and are located in the zone of veterinary welfare outside potential foci of animal diseases. In recent years, the company has been actively developing its export business. The company's land bank is more than 411 thousand hectares, on which winter and spring wheat, barley and soybeans are grown, creating a basis for high-quality animal feed production
Contact Information	**Address:** Tomsk region. Tomsk, per. Cooperative, 2 **Tel.:** +7 382 2 90 00 99 **E-mail:** info@sagro.ru **Website:** https://sibagrogroup.ru

2.2.3. Foreign trade in agricultural products

2.2.3.1. Import of agricultural products

In 2023 import of Russian agricultural products amounted to 36.0 billion US dollars which is 2.1% (-773.3 million US dollars) lower than in 2022. In 2023 import from the BRICS countries increased by 4.9% (+347.3 million US dollars) compared to the previous year, while import from other countries decreased by 3.8% (-1.1 billion US dollars). Volume of import of agricultural products for 2018-2023 increased by an average of 3.7% per year.

Import of agricultural products of Russia, 2018-2023, billion US dollars



Source: ITC Trade Map

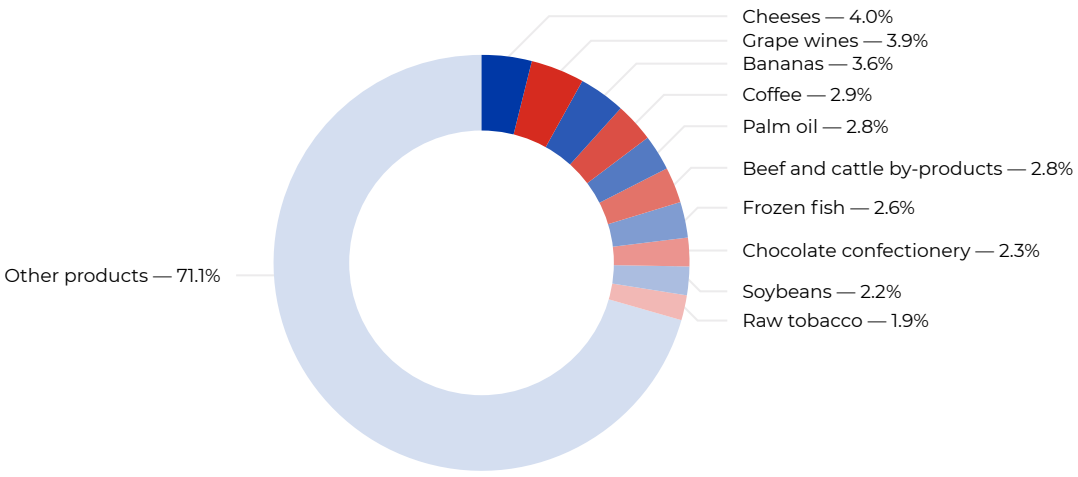
At the end of 2023 the top 5 imported products of the Russian agro-industrial complex included cheeses (4.0% of import value), grape wines (3.9%), bananas (3.6%), coffee (2.9%) and palm oil (2.8%). In total the top 10 commodity items accounted for 28.9% of import of Russian agricultural products in value terms.

Import structure of Russian agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Cheeses	979.3	1,162.3	1,227.7	1,306.6	1,696.1	1,424.7	-271.4	-16.0
2	Grape wines	1,051.1	1,161.2	1,092.5	1,251.7	1,309.1	1,421.5	112.4	8.6
3	Bananas	1,154.6	1,119.9	1,116.8	1,079.6	1,188.9	1,306.0	117.1	9.8
4	Coffee	592.9	631.5	652.3	787.6	1,099.0	1,038.6	-60.4	-5.5
5	Palm oil	748.8	668.1	793.2	1,271.7	1,436.6	998.3	-438.3	-30.5
6	Beef and cattle by-products	1,450.6	1,207.5	1,063.2	1,034.9	1,248.3	996.4	-251.9	-20.2
7	Frozen fish	776.9	796.9	706.4	830.1	826.6	951.2	124.6	15.1
8	Chocolate confectionery	541.8	586.1	547.0	645.4	753.5	830.2	76.7	10.2
9	Soybeans	992.6	791.9	862.2	1,261.4	742.4	779.0	36.6	4.9
10	Raw tobacco	633.6	618.1	600.1	580.6	687.5	674.1	-13.5	-2.0
	Other products	21,156.5	21,575.9	21,793.8	24,901.8	25,818.3	25,613.1	-205.2	-0.8
	Total	**30,078.7**	**30,319.5**	**30,455.3**	**34,951.3**	**36,806.3**	**36,033.0**	**-773.3**	**-2.1**

Source: ITC Trade Map

Import structure of Russian agricultural products in value terms, 2023, %



Source: ITC Trade Map

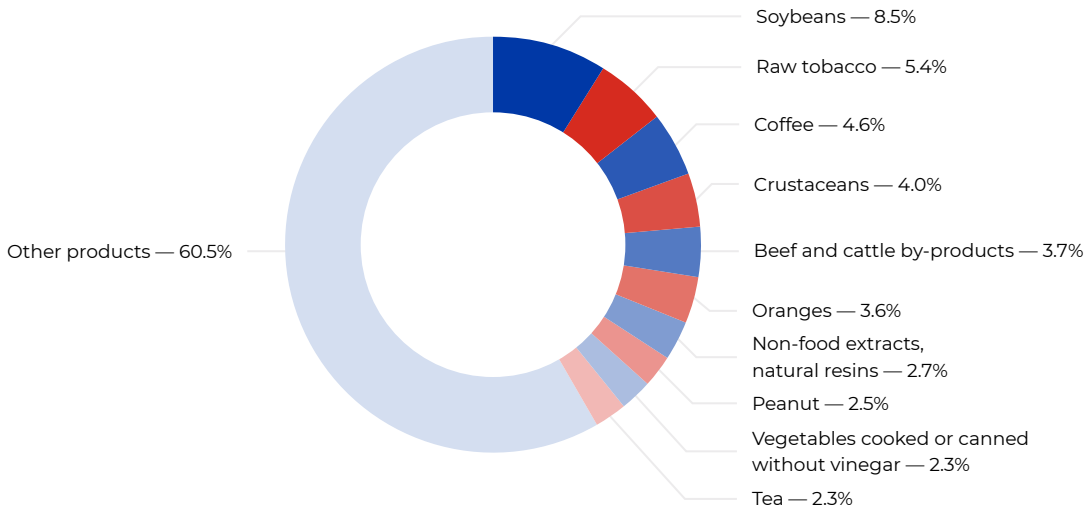
At the end of 2023 the structure of Russia's import from the BRICS countries was dominated by soybeans (8.5% of import value). The top 5 imported agricultural products also included raw tobacco (5.4%), coffee (4.6%), crustaceans (4.0%) and beef and cattle by-products (3.7%). In total the top 10 commodity items accounted for 39.5% of Russian agricultural import from the BRICS countries in value terms.

Import structure of Russian agricultural products from the BRICS countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	549.2	365.3	445.4	562.7	572.0	634.1	62.1	10.9
2	Raw tobacco	272.8	267.2	229.9	221.8	329.2	405.0	75.8	23.0
3	Coffee	123.4	141.3	171.2	221.9	369.9	340.6	-29.3	-7.9
4	Crustaceans	106.6	111.7	105.8	167.8	257.3	295.7	38.4	14.9
5	Beef and cattle by-products	90.3	289.6	244.7	151.5	228.1	273.7	45.6	20.0
6	Oranges	232.1	230.3	221.3	234.0	265.7	269.5	3.8	1.4
7	Non-food extracts, natural resins	113.5	113.2	101.1	120.9	237.3	202.2	-35.2	-14.8
8	Peanut	123.5	139.0	151.3	154.5	144.3	189.6	45.3	31.4
9	Vegetables cooked or canned without vinegar	64.9	76.4	79.3	76.9	104.5	175.4	70.9	67.9
10	Tea	200.5	172.7	154.3	176.9	165.4	169.1	3.7	2.2
	Other products	3,316.7	3,238.7	3,234.1	3,594.4	4,458.0	4,524.2	66.2	1.5
	Total	**5,193.6**	**5,145.3**	**5,138.4**	**5,683.4**	**7,131.7**	**7,479.0**	**347.3**	**4.9**

Source: ITC Trade Map

Import structure of Russian agricultural products from the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

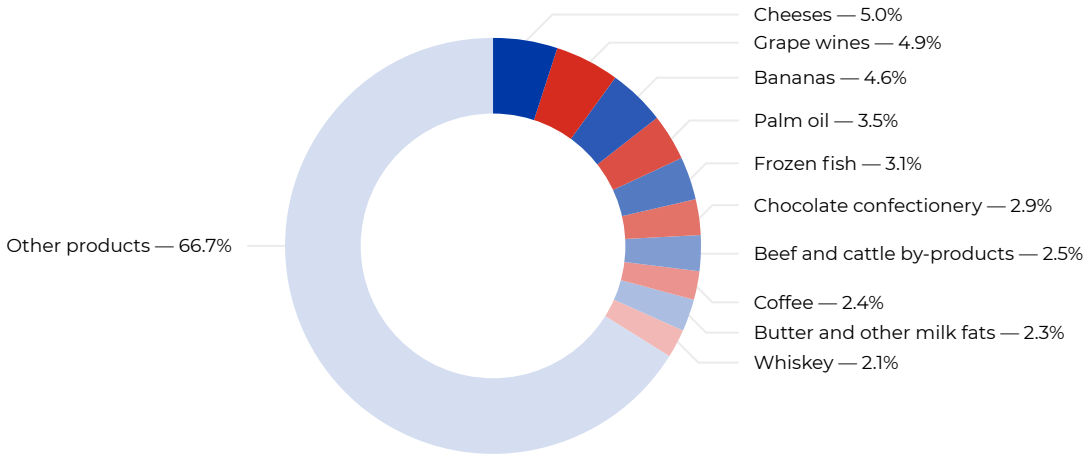
At the end of 2023 the top 5 imported agricultural products of Russia from other countries included cheeses (5.0% of import value), grape wines (4.9%), bananas (4.6%), palm oil (3.5%) and frozen fish (3.1%). In total the top 10 product items accounted for 33.3% of imports of Russian agricultural products from other countries in value terms.

Import structure of Russian agricultural products from other countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million USD	%
1	Cheeses	970.4	1,152.8	1,217.0	1,294.4	1,685.5	1,417.1	-268.4	-15.9
2	Grape wines	1,023.4	1,132.7	1,072.8	1,226.6	1,286.2	1,390.0	103.8	8.1
3	Bananas	1,154.5	1,119.8	1,116.7	1,079.3	1,188.8	1,303.6	114.8	9.7
4	Palm oil	748.7	668.1	793.2	1,271.7	1,436.6	998.1	-438.5	-30.5
5	Frozen fish	704.8	686.7	635.6	763.4	776.3	895.0	118.7	15.3
6	Chocolate confectionery	539.1	583.8	542.5	640.3	749.7	819.8	70.1	9.4
7	Beef and cattle by-products	1,360.3	918.0	818.5	883.3	1,020.2	722.7	-297.5	-29.2
8	Coffee	469.5	490.2	481.2	565.7	729.1	698.0	-31.2	-4.3
9	Butter and other milk fats	431.3	641.7	600.3	599.3	782.6	661.3	-121.3	-15.5
10	Whiskey	324.5	394.9	370.1	440.7	271.9	613.7	341.8	2.3 times
	Other products	17,158.4	17,385.6	17,669.1	20,503.1	19,747.6	19,034.6	-713,0	-3.6
	Total	**24,885.1**	**25,174.2**	**25,316.8**	**29,267.9**	**29,674.6**	**28,554.0**	**-1,120.6**	**-3.8**

Source: ITC Trade Map

Import structure of Russian agricultural products from other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest exporters of agricultural products to Russia were China (6.9% of import in value terms), Brazil (5.4%), India (3.1%) and Iran (2.1%). In total the BRICS member countries accounted for 20.8% of import of Russian agricultural products.

Also among the largest exporting countries in 2023 were Belarus (14.7% of import in value terms), Türkiye (6.4%) and Ecuador (4.8%). In total the top 10 countries accounted for 56.1% of import of Russian agricultural products in value terms.

The main countries exporting agricultural products to Russia in value terms, 2018–2023, million US dollars

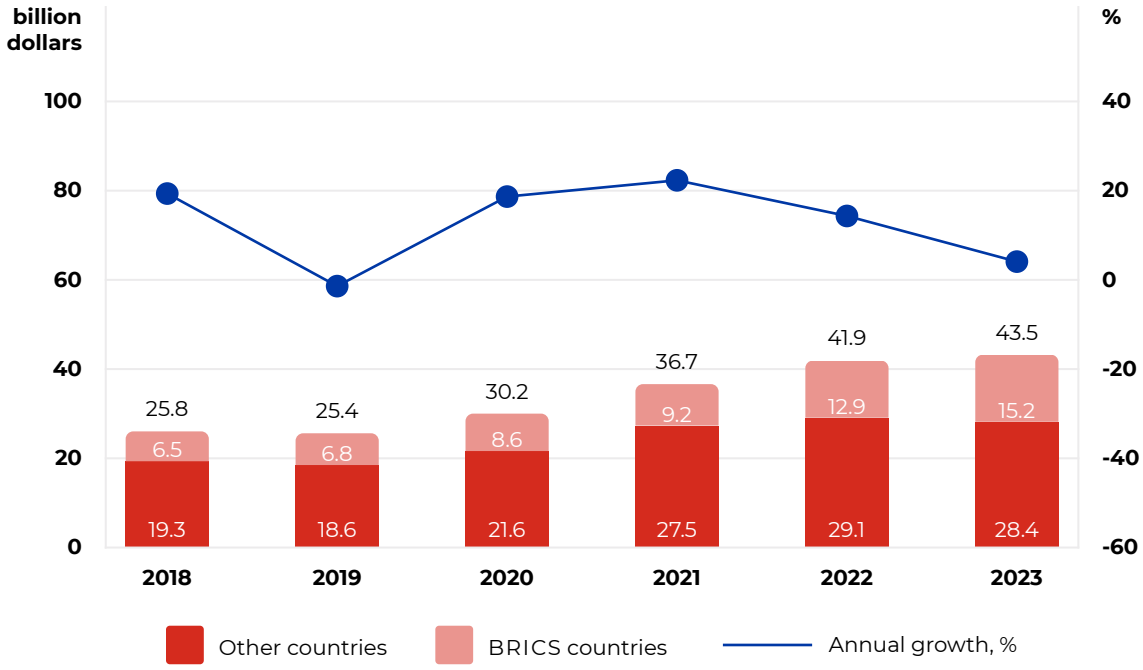
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	1,984.6	1,793.9	1,553.0	1,674.3	2,439.5	2,472.0	32.5	1.3
2	Brazil	1,357.8	1,478.5	1,442.8	1,617.3	1,885.5	1,950.9	65.3	3.5
3	India	693.8	717.6	638.6	735.5	946.8	1,114.8	168.0	17.7
4	Iran	395.4	454.8	713.9	757.2	689.7	764.3	74.6	10.8
5	Egypt	420.9	384.4	420.3	481.7	689.4	644.5	-44.9	-6.5
6	South Africa	286.8	265.6	322.5	346.2	390.1	421.2	31.1	8.0
7	UAE	31.0	25.5	25.7	35.6	32.5	41.2	8.7	26.7
8	Ethiopia	22.4	23.9	20.1	27.4	34.0	36.6	2.5	7.5
9	Saudi Arabia	0.9	1.0	1.5	8.1	24.0	33.5	9.5	39.4
	Total BRICS	**5,193.6**	**5,145.3**	**5,138.4**	**5,683.4**	**7,131.7**	**7,479.0**	**347.3**	**4.9**
1	Belarus	4,122.1	4,305.4	4,212.1	4,600.2	5,914.0	5,282.3	-631.7	-10.7
2	Türkiye	1,149.4	1,330.7	1,599.9	1,864.8	2,334.9	2,318.0	-17.0	-0.7
3	Ecuador	1,288.7	1,284.8	1,273.0	1,455.2	1,551.9	1,743.1	191.2	12.3
4	Germany	1,421.1	1,352.3	1,359.6	1,553.4	1,456.9	1,652.6	195.6	13.4
5	Indonesia	867.3	837.7	1,041.5	1,664.0	1,829.3	1,403.9	-425.3	-23.3
6	Italy	1,118.2	1,083.8	1,047.9	1,209.4	1,420.4	1,349.8	-70.6	-5.0
7	France	890.3	890.5	987.2	1,172.6	848.8	920.0	71.1	8.4
8	Vietnam	473.6	477.2	475.0	587.0	763.2	720.9	-42.3	-5.5
9	Azerbaijan	527.9	575.4	566.6	592.5	660.2	716.6	56.5	8.6
10	Netherlands	665.6	712.5	632.7	728.4	718.7	652.3	-66.4	-9.2
	Other countries	12,360.9	12,323.9	12,121.2	13,840.4	12,176.3	11,794.5	-381.8	-3.1
	Total non-BRICS	**24,885.1**	**25,174.2**	**25,316.8**	**29,267.9**	**29,674.6**	**28,554.0**	**-1,120.6**	**-3.8**
	Total	**30,078.7**	**30,319.5**	**30,455.3**	**34,951.3**	**36,806.3**	**36,033.0**	**-773.3**	**-2.1**

Source: ITC Trade Map

2.2.3.2. Export of agricultural products

Export of Russian agricultural products in 2023 amounted to 43.5 billion US dollars which is 3.8% (+1.6 billion US dollars) higher than the level of 2022. In 2023 export to the BRICS countries increased relative to the previous year by 17.8% (+2.3 billion US dollars), export to other countries decreased by 2.5% (-716.5 million US dollars). For 2018-2023 Russian export of agricultural goods increased by an average of 11.1% per year.

Export of agricultural products of Russia, 2018-2023, billion US dollars



Source: ITC Trade Map

The main export product of the Russian agro-industrial complex in 2023 was wheat (30.2%). A significant share of export also fell on sunflower oil (10.0%), frozen fish (6.3%) and crustaceans (3.9%). In total the top 10 exported types of products accounted for 66.0% of the export value of Russian agro-industrial complex products.

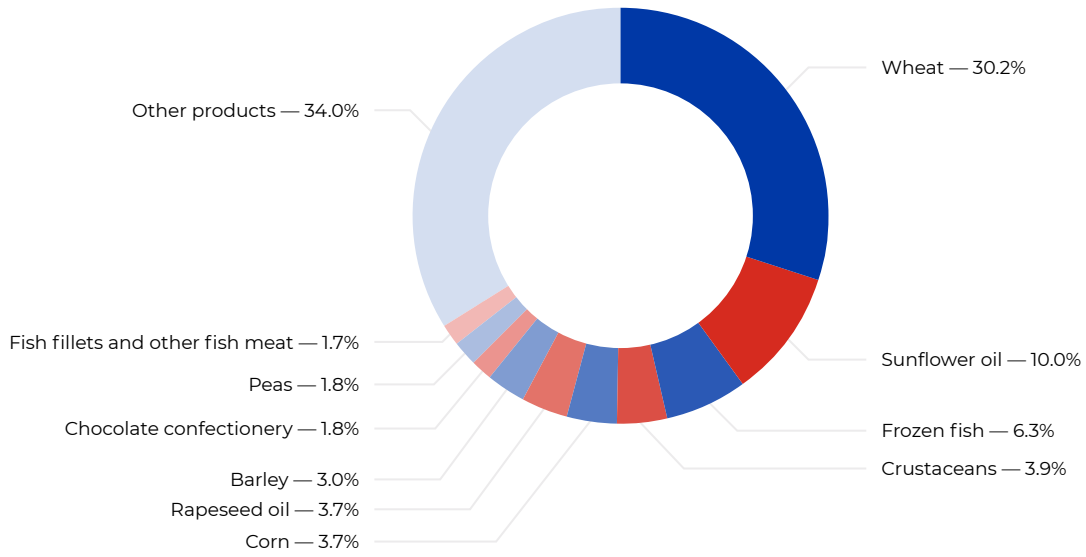
Export structure of Russian agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	8,436.5	6,406.3	8,194.6	8,895.7	10,852.5	13,164.7	2,312.2	21.3
2	Sunflower oil	1,606.8	2,206.2	2,811.3	3,997.9	4,688.8	4,338.5	-350.2	-7.5
3	Frozen fish	3,274.3	3,012.7	2,827.8	2,938.8	3,186.6	2,721.2	-465.4	-14.6

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
4	Crustaceans	1,198.8	1,582.5	1,673.7	2,664.1	1,469.2	1,718.7	249.5	17.0
5	Corn	854.5	617.6	699.5	1,014.0	1,199.3	1,610.9	411.6	34.3
6	Rapeseed oil	361.4	514.2	585.5	987.3	1,403.6	1,605.1	201.4	14.4
7	Barley	1,026.7	764.0	1,087.2	1,262.3	1,133.0	1,289.4	156.5	13.8
8	Chocolate confectionery	631.5	720.0	729.3	864.2	773.3	781.3	8.0	1.0
9	Peas	228.3	137.3	170.7	377.7	411.5	780.4	368.9	89.6
10	Fish fillets and other fish meat	481.1	455.1	488.2	694.7	936.9	721.9	-215.0	-23.0
	Other products	7,658.1	9,029.9	10,923.9	13,004.1	15,892.3	14,792.3	-1,100.0	-6.9
	Total	**25,758.0**	**25,445.8**	**30,191.7**	**36,700.8**	**41,947.0**	**43,524.4**	**1,577.4**	**3.8**

Source: ITC Trade Map

Export structure of Russian agricultural products in value terms, 2023, %



Source: ITC Trade Map

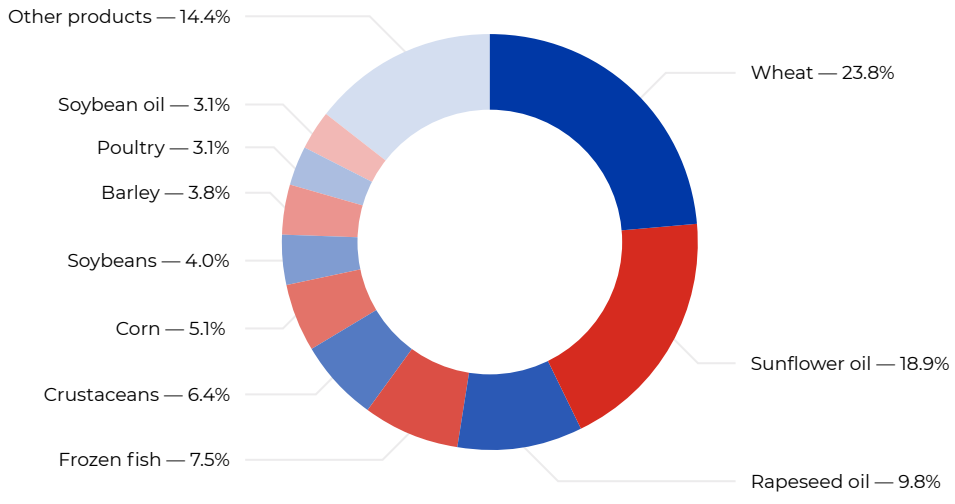
The main export products of the Russian agro-industrial complex to the BRICS countries in 2023 were wheat (23.8%), sunflower oil (18.9%), rapeseed oil (9.8%) and frozen fish (7.5%). In total the top 10 exported types of products accounted for 85.6% of the export value of Russian agro-industrial complex products.

Export structure of Russian agricultural products to the BRICS countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	2,271.5	1,571.2	2,402.7	3,078.1	4,331.6	3,605.8	-725.8	-16.8
2	Sunflower oil	674.5	1,121.2	1,389.8	1,812.4	2,177.7	2,868.7	691.0	31.7
3	Rapeseed oil	65.8	170.0	251.2	393.7	959.2	1,487.4	528.2	55.1
4	Frozen fish	1,229.2	1,325.6	1,188.0	478.5	828.1	1,136.6	308.5	37.3
5	Crustaceans	232.2	296.0	338.5	562.7	610.5	971.2	360.7	59.1
6	Corn	287.7	395.9	328.4	311.4	534.4	779.7	245.3	45.9
7	Soybeans	244.1	213.5	337.8	297.0	603.7	601.5	-2.1	-0.3
8	Barley	595.1	465.2	732.1	579.2	615.5	577.9	-37.6	-6.1
9	Poultry	9.8	177.4	292.0	339.2	564.1	474.7	-89.4	-15.9
10	Soybean oil	161.5	186.6	273.4	225.4	405.8	471.0	65.2	16.1
	Other products	698.0	911.2	1,066.4	1,073.8	1,227.4	2,177.4	949.9	77.4
	Total	**6,469.4**	**6,833.8**	**8,600.3**	**9,151.4**	**12,858.0**	**15,151.9**	**2,293.8**	**17.8**

Source: ITC Trade Map

Export structure of Russian agricultural products to the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

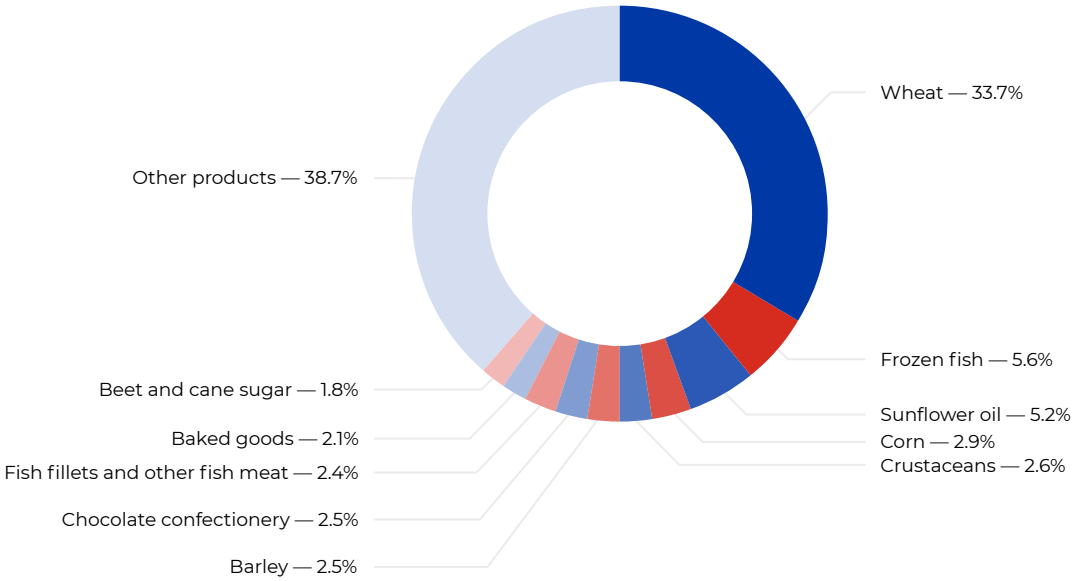
The main export products of the Russian agro-industrial complex to other countries in 2023 were wheat (33.7%), frozen fish (5.6%), sunflower oil (5.2%) and corn (2.9%). In total the top 10 exported types of products accounted for 61.3% of the export value of Russian agricultural products.

Export structure of Russian agricultural products to other countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	6,164.9	4,835.1	5,792.0	5,817.6	6,520.9	9,558.9	3,038.0	46.6
2	Frozen fish	2,045.2	1,687.1	1,639.8	2,460.3	2,358.5	1,584.6	-773.9	-32.8
3	Sunflower oil	932.4	1,085.0	1,421.5	2,185.4	2,511.0	1,469.8	-1,041.2	-41.5
4	Corn	566.8	221.7	371.1	702.5	665.0	831.2	166.3	25.0
5	Crustaceans	966.6	1,286.5	1,335.1	2,101.4	858.7	747.5	-111.2	-13.0
6	Barley	431.6	298.7	355.1	683.0	517.5	711.5	194.0	37.5
7	Chocolate confectionery	486.7	545.3	551.4	703.1	722.7	699.5	-23.2	-3.2
8	Fish fillets and other fish meat	480.7	452.1	483.7	685.3	934.7	677.5	-257.1	-27.5
9	Baked goods	344.1	400.0	423.3	530.2	641.3	599.5	-41.8	-6.5
10	Beet and cane sugar	183.0	271.4	466.3	258.8	180.9	501.7	320.8	2.8 times
	Other products	6,686.7	7,529.1	8,752.2	11,421.8	13,177.8	10,990.8	-2,187.0	-16.6
	Total	**19,288.7**	**18,612.0**	**21,591.5**	**27,549.4**	**29,089.0**	**28,372.5**	**-716.5**	**-2.5**

Source: ITC Trade Map

Export structure of Russian agricultural products to other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest importers of Russian agricultural products were China (17.5% of export in value terms), Egypt (5.8%) and Iran (5.1%). The BRICS member states accounted for a total of 34.8% of Russian agricultural export.

Also among the largest importing countries in 2023 were Türkiye (11.4% of export in value terms), Kazakhstan (7.6%) and Belarus (6.3%). In total the top 10 importing countries in 2023 accounted for 65.0% of export of Russian agricultural products.

The main importing countries of agricultural products from Russia in value terms, 2018–2023, million US dollars

№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	2,529.5	3,197.6	3,953.5	3,381.0	4,972.3	7,615.2	2,642.9	53.2
2	Egypt	2,147.4	1,469.4	1,955.0	1,834.5	2,267.7	2,508.6	240.9	10.6
3	Iran	791.4	1,208.6	1,168.0	2,671.0	3,404.4	2,236.6	-1,167.8	-34.3
4	India	66.7	232.9	399.1	320.9	766.4	1,115.0	348.5	45.5
5	Saudi Arabia	497.1	347.3	691.0	683.2	1,023.7	999.1	-24.6	-2.4
6	UAE	224.1	244.2	227.4	107.7	178.0	304.9	126.8	71.2
7	Brazil	6.0	26.5	71.7	47.7	128.3	205.3	77.0	60.0
8	South Africa	159.1	94.2	123.3	28.8	98.6	167.3	68.7	69.7
9	Ethiopia	48.1	13.2	11.4	76.5	18.6	0.0	-18.6	-100.0
	Total BRICS	**6,469.4**	**6,833.8**	**8,600.3**	**9,151.4**	**12,858.0**	**15,151.9**	**2,293.8**	**17.8**
1	Türkiye	1,860.7	2,489.4	3,126.6	4,324.0	5,052.4	4,955.7	-96.8	-1.9
2	Kazakhstan	1,539.4	1,856.2	2,060.0	2,761.3	3,398.4	3,299.1	-99.3	-2.9
3	Belarus	1,279.6	1,388.9	1,415.4	1,829.3	2,784.0	2,750.3	-33.7	-1.2
4	South Korea	1,596.1	1,554.9	1,744.5	2,467.0	2,318.1	1,854.4	-463.7	-20.0
5	Uzbekistan	354.1	462.8	683.9	802.4	980.8	960.4	-20.4	-2.1
6	Algeria	173.4	136.3	145.4	336.7	698.4	837.5	139.2	19.9
7	Azerbaijan	422.5	619.6	690.7	717.8	858.7	736.0	-122.7	-14.3
8	Netherlands	955.6	1,070.2	1,051.1	1,664.4	851.1	707.8	-143.4	-16.8
9	Bangladesh	395.4	541.5	435.1	292.4	134.6	706.4	571.8	в 5.2 раза
10	Latvia	537.8	411.0	488.2	681.9	748.4	673.8	-74.7	-10.0
	Other countries	10,174.1	8,081.2	9,750.7	11,672.2	11,264.0	10,891.3	-372.7	-3.3
	Total non-BRICS	**19,288.7**	**18,612.0**	**21,591.5**	**27,549.4**	**29,089.0**	**28,372.5**	**-716.5**	**-2.5**
	Total	**25,758.0**	**25,445.8**	**30,191.7**	**36,700.8**	**41,947.0**	**43,524.4**	**1,577.4**	**3.8**

Source: ITC Trade Map

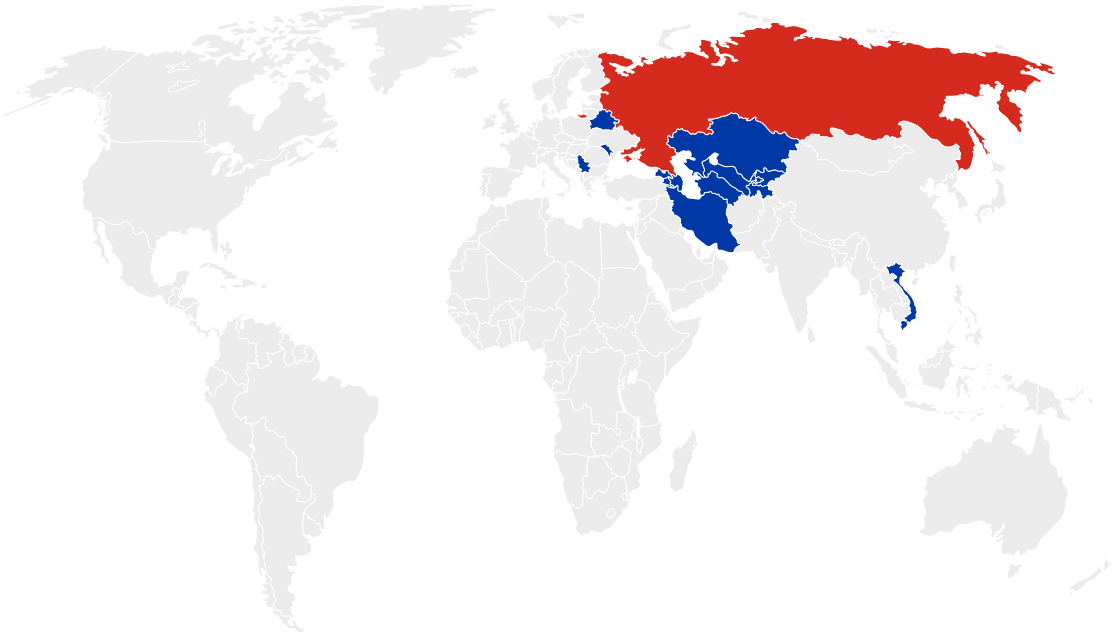
2.2.3.3. International cooperation

Russia's trade policy is formed taking into account the obligations assumed under the following international trade agreements (preferential agreements that have entered into force are listed):

- Free Trade Agreement of October 18, 2011 (member states: Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russia, Moldova, Ukraine (the agreement between Russia and Ukraine was suspended), Tajikistan);
- Treaty on the Eurasian Economic Union (EAEU) of May 29, 2014 (member states: Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russia);
- Free Trade Agreement between the EAEU and Vietnam dated May 29, 2015 (came into force on October 5, 2016);
- Interim Agreement leading to the formation of a free trade area between the EAEU and Iran dated May 17, 2018 (came into force on October 27, 2019);
- Free Trade Agreement between the EAEU and Serbia of October 25, 2019 (came into force on July 10, 2021).

In addition, Russia has bilateral agreements on a free trade zone with Azerbaijan, Georgia, Serbia, Turkmenistan, and Uzbekistan.

Russian trade agreements



State/association with which Russia has entered into a preferential trade agreement	Effective date of the agreement
Uzbekistan	1993
Turkmenistan	1993
Azerbaijan	1993
Georgia	1994
Serbia	2006
CIS Free Trade Agreement: Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russia, Moldova, Tajikistan	2012
Eurasian Economic Union (EAEU): Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russia	2015
Vietnam (within the EAEU)	2016
Iran (within the EAEU)	2019
Serbia (within the EAEU)	2021

2.2.3.4. Special economic zones

Special economic zones (SEZ) in Russia are one of the most large-scale projects to attract direct investment in priority types of economic activity. There are 50 SEZs in the country (31 industrial-manufacturing SEZs, 7 technology-innovation SEZs, 10 tourism-recreational SEZs and 2 port SEZs (Port-SEZs)).

It is advisable for suppliers of agro-industrial products to consider the industrial-manufacturing SEZ and the Port-SEZ. SEZs of industrial enterprises are created for the production, processing and sale of goods in areas of no more than forty square kilometers and are located in the most developed regions from an economic point of view. Port-SEZs are created for the purpose, among other things, of providing logistics services, as well as a base for new routes, located in close proximity to main transport routes.

In the public domain you can see the catalog of products of SEZ residents[3] which also includes food products.

SEZs offer businesses a number of competitive advantages for implementing projects, including localizing production in Russia and entering the Eurasian market, including:

- minimal administrative barriers;
- tax benefits and customs preferences;
- reduced prices for rent and purchase of land;
- assistance in the implementation of the investment project at the first stage of its development, as well as its further support from the managing bodies of the SEZ.

[3] https://clck.ru/3Arpjq

2.2.3.5. Institutes for supporting the export of agricultural products

AGROEXPORT

The Federal State Budgetary Institution “Agroexport”

(Federal Center “Agroexport”)

Description	The Federal State Budgetary Institution “Agroexport” is a center of knowledge and competence in the field of agricultural export, created by the Ministry of Agriculture of the Russian Federation. It controls and coordinates the implementation of the Federal Project “Export of Agricultural Products”, and also cooperates with the management bodies of the agro-industrial complex in terms of the regional projects’ implementation and export potential development of the Russian territorial entities. Agroexport possesses unique competencies in the field of foreign markets analysis, trade barriers assessment, food products promotion and positioning, consulting on state support programs for agro-industrial complex exporters, organization of export events — exhibitions, conferences, training seminars and business missions
Main tasks	• coordination and monitoring of the implementation of the Federal Project “Export of Agricultural Products”; • assessing the export potential of individual entities and identifying drivers of regional export growth; • informing businesses about current government support measures; • analysis of tariff and non-tariff barriers to international trade; • forecasting the conditions of world agricultural markets; • analysis of promising foreign markets; • development of strategies to increase the presence of Russian agricultural products in foreign markets; • development of concepts for promoting promising product groups in target markets; • development of export guides (guidelines and reference books); • carrying out activities to develop agricultural export; • conducting business missions to find partners in foreign countries; • providing consulting services at all stages of the life cycle of an export project
Contact details	**Address:** Moscow, st. Zemlyanoy Val, 9 **Tel.:** +7 (495) 280 74 49 **E-mail:** info@aemcx.ru **Website:** https://aemcx.ru/

Russian Export Center JSC (REC)

Description	Russian Export Center JSC is a state institution for supporting non-resource exports, consolidating a group of companies that provide Russian exporters with a wide range of financial and non-financial support measures. The Russian Agency for Insurance of Export Credits and Investments (EXIAR JSC), Roseximbank JSC and ANO School of Export are integrated into the REC Group. The center provides Russian exporters with support in a "single window" mode — exporting companies can receive a full range of services from initial consultations to assistance in processing export transactions. REC works with all exporters of non-commodity products, goods and services without industry restrictions, providing support at any stage of export activity
Main goals	• lending and insurance of export transactions and investments; • information support, conducting training webinars; • assisting in promotion to foreign markets, including searching for potential partners, supporting the negotiation process, selecting marketplaces, searching for foreign suppliers, etc.; • implementation of state export support programs; • educational support for exporting companies, formation of a knowledge base and competencies in the field of foreign trade activities; • preparation of analytical reports and studies on foreign trade issues; • legal support for exporters, consultations on export certification issues
Contact details	**Address:** Moscow, Krasnopresnenskaya embankment 12, entrance 9 **Tel.:** +7 (495) 937-4747 **E-mail:** info@exportcenter.ru **Website:** https://www.exportcenter.ru/

Expert opinion

Ms. Ankita Sachdev

Joint Director BRICS Chamber of Commerce and Industry

India is one of the largest agricultural producers in the world. The country is among world leaders in sugar cane and milk production. In addition, India ranks in the top 15 countries in terms of both food import and export.

Participation in BRICS provides us with a number of advantages in economic, technological, political, cultural and other areas. The country benefits from enhanced economic co-operation with other BRICS members, leading to increased trade, investment and opportunities for economic growth. The platform facilitates co-operation on sustainable development initiatives, enabling India to access the resources and knowledge of other countries for a more comprehensive solution to socio-economic issues.

Indian agro-industrial producers are actively promoting their products in the BRICS markets. Cultural adaptation is among the most popular practices used by Indian companiesю for instance, Indian spice producers customize packaging to appeal to Brazilian tastes. In addition, leveraging social media and e-commerce, Indian producers develop their products in other BRICS countries. For example, Indian tea exporters use online platforms to showcase their products to South African consumers.

India expects several benefits from BRICS enlargement, including increased economic opportunities, diversified partnerships, strengthened regional cooperation and expanded markets for Indian goods and services.

In my opinion, countries with significant agricultural potential and emerging economies like Nigeria and Indonesia could strengthen BRICS' position in the global food market. Their accession would broaden the association agricultural diversity, increase market access, and amplify its influence on global food trade dynamics.

2.3. India

2.3.1. Social and economic profile

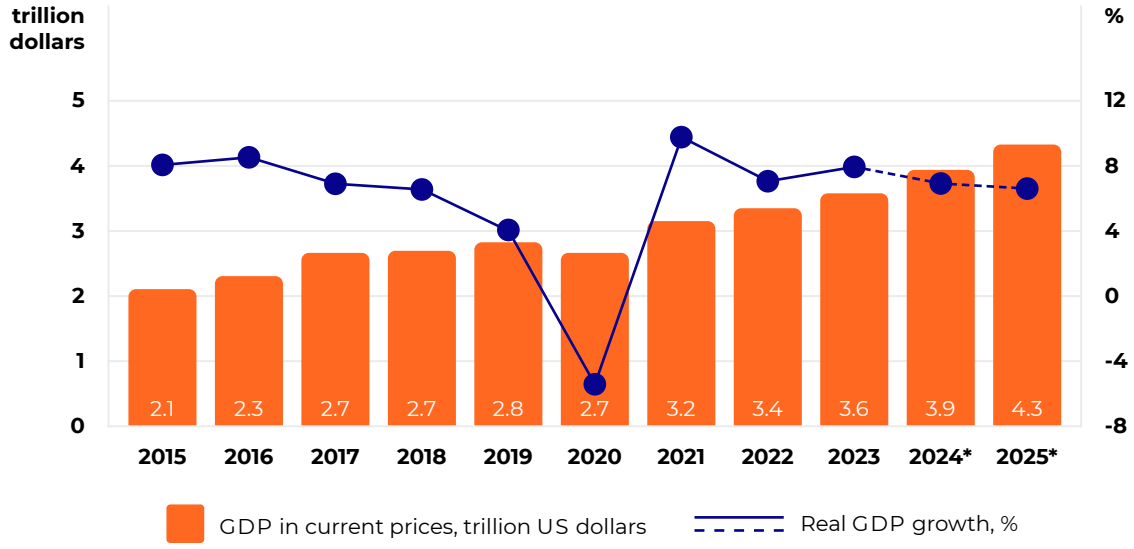
The Republic of India (India) is a country that ranks first in the world in terms of population. Since the 2000s India has been implementing important economic reforms and has made significant progress, reducing the number of people living below the extreme poverty line by 90 million.

The country's area is 3.3 million km^2, of which 1.8 million km^2 is suitable for agriculture. The coastline is more than 7,500 km. India is the seventh largest country in the world by land area. The length of the land border is 15.1 thousand km, the country borders on 7 states. In 2022 the urbanization rate reached 35.9%.

Agriculture accounts for 16.7% in GDP of India, while the industrial and service sectors account for 25.7% and 48.4%, respectively. About 42.9% of the population is employed in agriculture, 26.1% in industry and 31.0% in the service sector. In 2023 India's unemployment rate was 4.7%.

In 2022 the country's real GDP growth was 7.0% compared to 9.7% in 2021, due to the exhaustion of pent-up demand after the COVID-19 recession in 2020. However, India remains one of the fastest growing economies in the world thanks to sustainable consumption levels, significant investment and high service exports. According to forecasts, in the medium term, high growth rates of the country's economy are expected to remain at a level of more than 6% including due to a favorable demographic situation. Today India's population is one of the youngest in the world, which provides broad prospects for long-term growth of the country's economy by increasing the share of working-age citizens. It is possible to realize this potential provided that the government carries out structural reforms aimed at developing human capital.

Dynamics of Indian GDP in current prices, 2015-2025

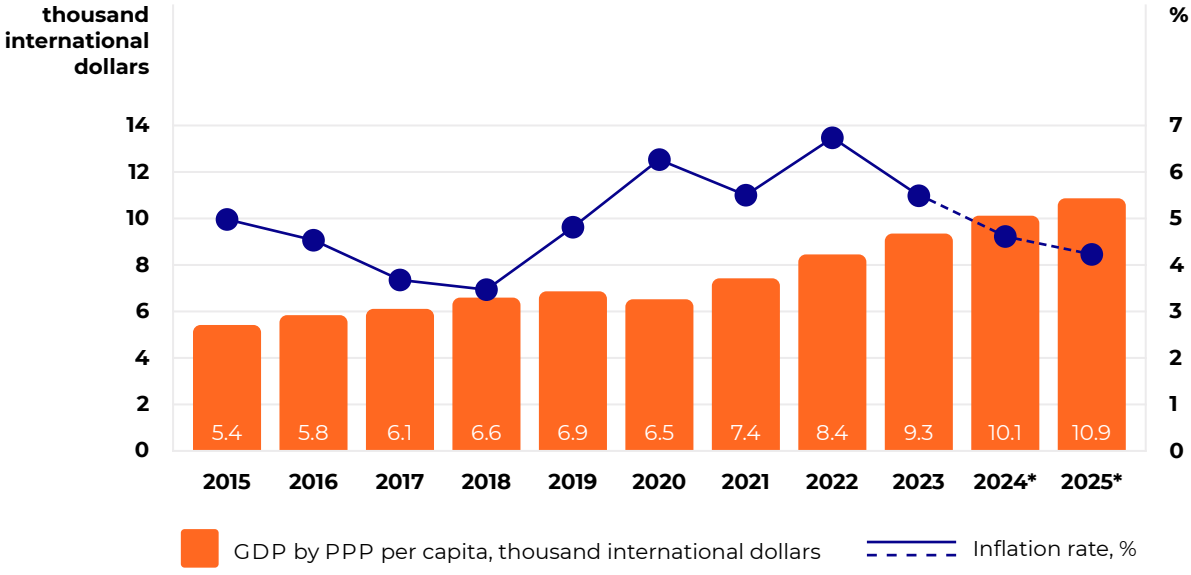


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the IMF in 2022 the inflation rate was 6.7% compared to 5.5% in 2021. The main factor affecting this indicator was the increase in prices for food products, including in 2023. Despite lower inflationary pressure compared to the peak in 2022, the Central Bank of India will continue to hold interest rates at 6.5% until the inflation target of 4% is achieved which is expected in the medium term.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

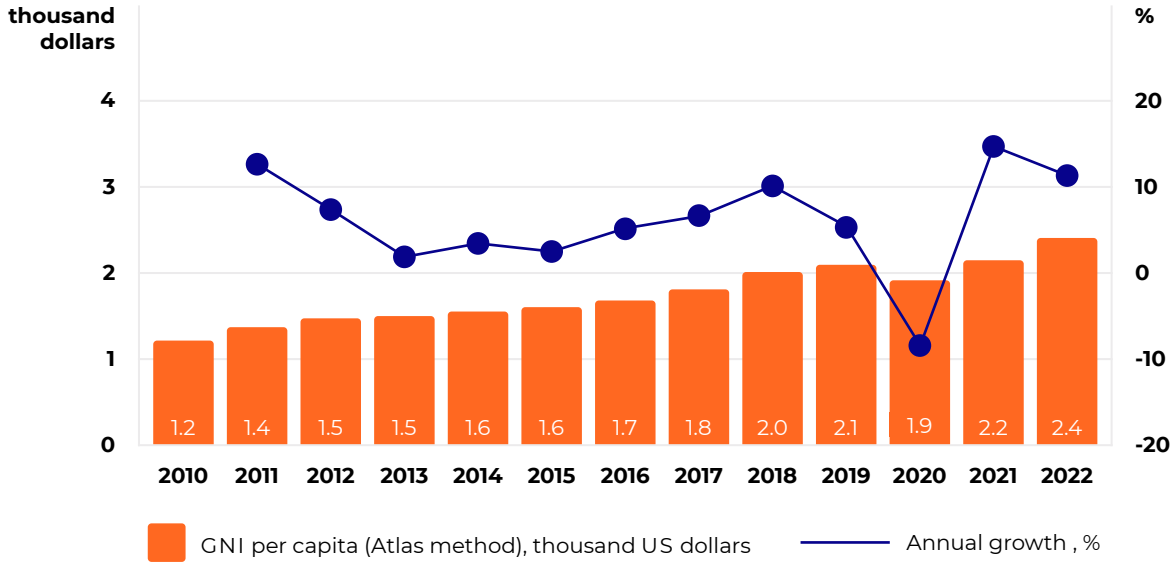


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification India belongs to a lower-middle income country by GNI per capita based on the Atlas method. In 2022 India's GNI per capita was 2.4 thousand US dollars. Until 2007 the country fell into the group of low income countries. With the exception of 2020 the GNI has shown a steady annual increase since 2010.

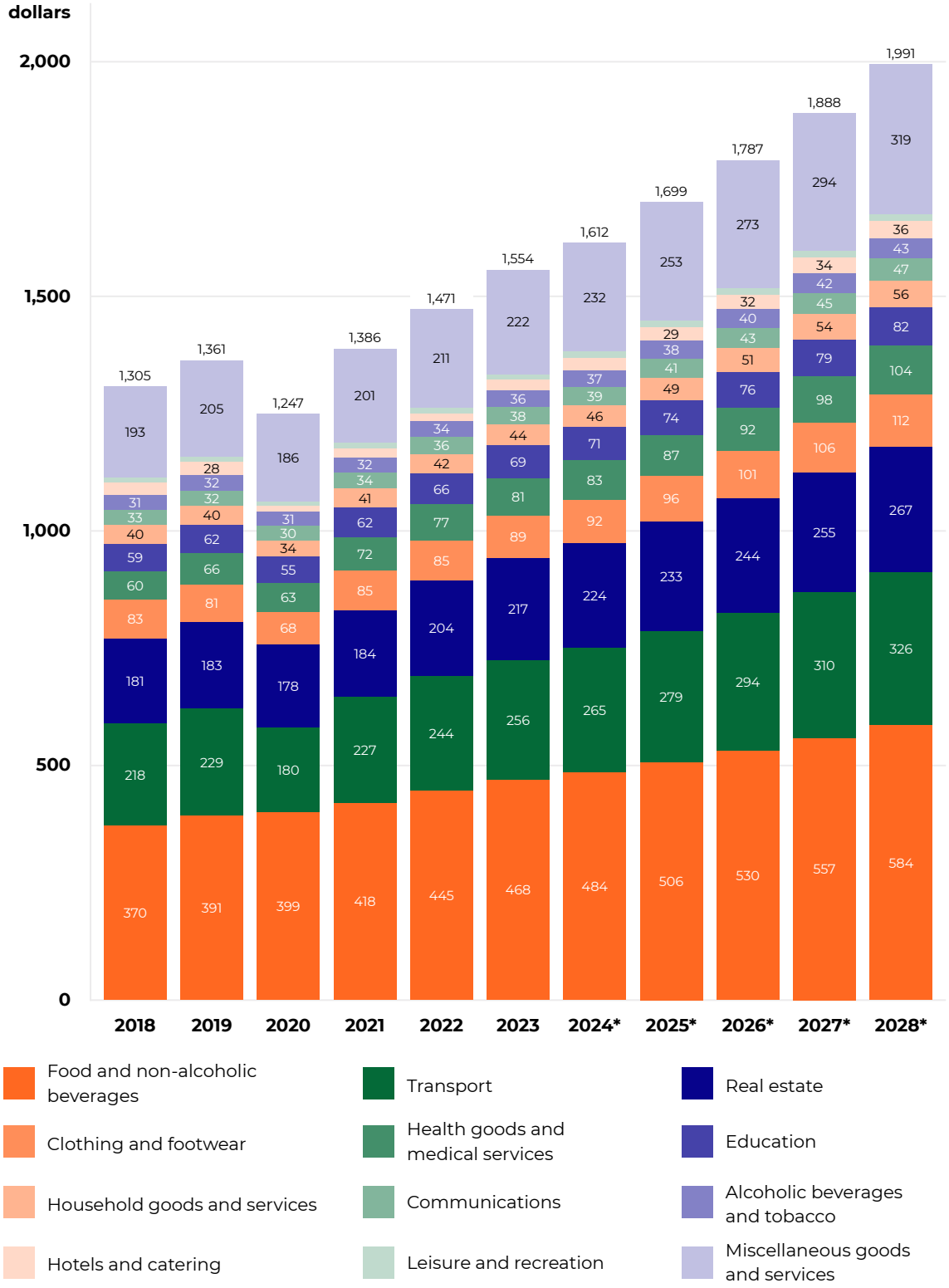
Dynamics of GNI per capita in India, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 amounted to 1,554 US dollars in constant 2023 prices, which is 5.7% higher than in 2022. Food and non-alcoholic beverages represented the majority of expenditures — about 30.1%. Other significant expenditures included transport (16.5%) and real estate (14.0%). In 2028 final consumption expenditures per capita are projected to reach 1,991 US dollars, where food and non-alcoholic beverages will account for 584 US dollars (29.3%).

Final consumption expenditures in India per capita in constant prices 2023, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.3.2. Agriculture

2.3.2.1. Crop and livestock production

India is one of the largest agricultural producers in the world. The country has three cropping seasons: Kharif, Rabi and Zaid. Kharif begins with the arrival of monsoons and rains, when from June to July such crops as rice, corn, peanuts, etc. are sown. Harvesting lasts from September to October. Rabi, on the contrary, is a dry season: in October–December the sowing of wheat, barley and oilseeds takes place. Crops are harvested in April–June. Zaid lasts from March to July; during this period vegetables, cucurbits and industrial crops (for example, jute) are sown and harvested.

India is one of the world's leading sugarcane producers. In 2022, according to India's Ministry of Agriculture and Farmers Welfare, sugarcane production stood at 431.8 million tons, 6.5% higher than the previous year.

289.1 million tons of grain was produced in 2022 with the average annual growth rate for 2018-2022 amounting to 2.7%. About 80% of the total grain production comes from rice and wheat. Over the past five years rice and wheat production has increased annually by an average of 3.7% and 1.9%, respectively. The key grain producing states are Uttar Pradesh, Madhya Pradesh and Punjab.

In 2022 the production of vegetables, roots and tubers in India increased by 4.3%, fruits and berries — by 4.9%. The top three states (Uttar Pradesh, West Bengal, Madhya Pradesh) accounted for 39.8% of vegetable production in the country. In the fruit segment three states (Andhra Pradesh, Maharashtra and Uttar Pradesh) produce 38.4% of the total harvest of this type of agro-industrial complex in the country.

Production of crop products, million tons

	2018	2019	2020	2021	2022
Sugar cane	**379.9**	**405.4**	**370.5**	**405.4**	**431.8**
Cereals	**259.6**	**263.2**	**274.5**	**285.3**	**289.1**
Rice	112.8	116.5	118.9	124.4	130.3
Wheat	99.9	103.6	107.9	109.6	107.7
Corn	28.8	27.7	28.8	31.6	33.7
Vegetables, roots and tubers	**184.0**	**183.2**	**188.3**	**200.4**	**209.1**
Potato	51.3	50.2	48.6	56.2	56.2
Onion	23.3	22.8	26.1	26.6	31.7
Tomatoes	19.8	19.0	20.6	21.2	20.7

	2018	2019	2020	2021	2022
Fruits and berries	**96.4**	**98.0**	**102.1**	**102.5**	**107.5**
Bananas	30.8	30.5	32.6	33.1	34.5
Mango	20.9	21.4	20.3	20.4	20.8

Source: Ministry of Agriculture & Farmers' Welfare, FAOSTAT

The cattle population in India exceeds 300 million heads, where about a third are buffaloes. Most states have banned the slaughter of domestic bulls and cows, which are considered sacred by the country's dominant religion, Hinduism.

In 2022 cattle meat production reached 4.4 million tons, showing an increase of 3.7% compared to 2021. Poultry meat production decreased significantly in 2020 due to the COVID-19 pandemic. The restrictions imposed by the government have had a serious negative impact on the functioning of the country's logistics infrastructure. With critical seaports closed, domestic production as well as overseas supplies were affected. In 2022 poultry meat production amounted to 3.8 million tons. The leading meat producing states are Uttar Pradesh, Maharashtra and West Bengal.

India is the world leader in dairy production. According to FAOSTAT, in 2022 the country produced 213.8 million tons of dairy products. It should be noted that cow's milk accounts for about 50% of the total production volume, the rest is buffalo milk. The leaders in milk production in India are the states of Uttar Pradesh and Rajasthan.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	103.3	114.4	122.0	129.0	139.2*
Dairy, million tons	187.8	198.4	210.0	221.1	213.8*
Beef, million tons	4.2	4.3	3.8	4.2	4.4
Poultry, million tons	4.1	4.2	3.6	3.8	3.8
Fish and seafood, million tons	12.6	13.6	14.2	14.7	16.2

Source: Ministry of Agriculture & Farmers' Welfare, Department of Animal Husbandry & Dairying, FAOSTAT, USDA, OECD
*Note. *estimated.*

2.3.2.2. Overview of milestones in the agro-industrial complex

1945 Foreign policy

India's accession to the Food and Agriculture Organization of the United Nations (FAO), the International Monetary Fund (IMF) and the World Bank.

1948 Foreign policy

The country's accession to the General Agreement on Tariffs and Trade (GATT).

1959 Domestic policy

Adoption of the Tamil Nadu Agricultural Produce Markets Act (No. 23/1959), which sets out the legal framework for regulating trade in agricultural products at the regional level. Subsequently, similar laws were passed by other states in India.

1962 New institutes

Law establishing the National Cooperative Development Corporation (NCDC) (No. 26/1962). The stated purpose of this industry association is announced as the development and implementation of programs to support the production, processing, marketing, storage, export and import of agricultural products, including food and livestock products, as well as a number of other goods and services, within cooperatives.

1965 New institutes

Creation of the Food Corporation of India (FCI) — a structural unit of the Ministry of Consumer Affairs, Food and Public Distribution of India, responsible for the purchase of grains from Indian farmers, the development of logistics infrastructure in the interests of the agro-industrial complex, building of strategic reserves, and ensuring the availability of basic food products for all strata of the Indian society and maintaining an affordable price level through grain interventions.

1965 New institutes

Establishment of the National Dairy Development Board (NDDB), a division of the Indian Ministry of Agriculture & Farmers' Welfare responsible for the development and regulation of the country's dairy industry.

1975 Foreign policy

Joining the World Intellectual Property Organization (WIPO).

1977 Foreign policy

Joining the International Fund for Agricultural Development (IFAD).

1982 New institutes

The creation, under the auspices of the Ministry of Finance of India, of the National Bank for Agriculture and Rural Development (NABARD), the stated purpose of which is, among other things, to regulate the activities of banks and lending to agricultural enterprises situated in the agricultural regions of India.

1982 New institutes

Establishment of the National Egg Coordination Committee (NECC), one of the world's largest poultry industry associations, with more than 35 thousand Indian farmers as members. The organization plays a key role in improving the efficiency of egg production in India and monitoring regional prices for this type of product.

1995 Foreign policy

India's joining the World Trade Organization (WTO).

2002 Domestic policy

Adoption of the Multi-State Co-operative Societies Act (No. 39/2002), the provisions of which determine the procedure for registering cooperative societies at the regional and national levels. The implementation of the law contributed to the development of cooperation between economic entities in neighboring states, including in the agricultural sector.

2013 Development plan

Approval of the Indian livestock development strategy with the following goals: increasing the productivity and investment attractiveness of the industry; promoting related scientific research; increasing production of milk, meat and eggs; bringing the quality of Indian livestock products in line with international standards; development of veterinary medicine, etc.

2013 Domestic policy

Adoption of the National Food Security Act (No. 20/2013), the provisions of which establish the state's responsibility to provide food to the most vulnerable segments of the population.

2017 Industry development

Adoption of a strategy for the development of Indian marine fisheries in order to ensure the sustainable development and modernization of the industry, as well as increasing the added value of products.

2018 Foreign policy

As part of the work of the intergovernmental Russian-Indian commission on trade, economic, scientific, technical and cultural cooperation, the first meeting of the Russian-Indian working group on cooperation in the field of agriculture was held. The parties discussed the development of bilateral trade and existing barriers, interaction in the field of veterinary and phytosanitary supervision, as well as cooperation in the field of agricultural science and exhibition and fair activities.

2020 Industry development

Approval of a strategy for the development of fisheries and fish farming in India, aiming at increasing the sustainability and diversification of the industry through the development of production of high value-added products, the creation and improvement of fisheries infrastructure, encouraging the aquaculture development, raising the competitiveness of Indian seafood on the world market and increasing exports.

2021 **Domestic policy**

Repeal of several farm laws passed in 2020 that deregulated the state wholesale market system due to farmers' concerns about potential government failure to maintain price floors.

2023 **Domestic policy**

Amid record-high global rice prices, the Indian government banned the export of white rice and imposed an export duty of 20% on parboiled rice. The goals of the new restrictions were to provide rice for the Indian market and reduce domestic prices. The country is the world's largest exporter of rice; India accounts for more than a third of supplies of this type of product, and therefore the rise in rice prices accelerated, most noticeably in countries in Africa and Asia with poorly developed economic systems, which are the main importers of Indian rice.

2023 **Industry development**

Launch of a unified sales platform for organic agricultural products based on the state agricultural cooperative society, National Cooperative Organics Ltd. (NCOL), and under the common brand Bharat Organics. It is planned that NCOL will provide organic product manufacturers with support on the issues of certification, logistics, branding, product labeling, as well as promote it on the national and foreign markets.

2.3.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

India is one of the ten largest suppliers of agricultural products to world markets. Meanwhile, the country's food security policy significantly affects world food prices due to the fact that restrictive measures on the export of a number of agricultural products are occasionally applied. India is the world's main supplier of rice and one of the largest exporters of sugar and cattle meat. The country is completely self-sufficient in grains, meat, sugar, fish and seafood, as well as other staple foods.

Sustainable development of agriculture

Digital Agriculture Mission 2021–2025 was launched in September 2021. The government has signed MoUs with several IT companies to promote the digitalization of agriculture. Efforts are taken to support and accelerate the implementation of projects based on new technologies such as artificial intelligence, remote sensing and GIS, as well as the use of drones and robots. Digitalization of agriculture involves the integration of advanced digital technologies into the agricultural production system. Projects are being implemented to increase the knowledge and capabilities of farmers in using modern technologies in their activities.

Consumption of healthy, functional and organic products

The establishment of the National Cooperative Organics Limited (NCOL) marked an important step towards promoting organic farming and supporting Indian farmers with the aim to develop a global organic brand, Bharat Organics, using Indian farmers' products. Thanks to NCOL the supply of organic products in the Indian market is expected to increase in the upcoming years, although the economic availability of such products will remain low. In addition the Indian market is expanding its range of plant-based protein foods, including meat and dairy alternatives.

Development of the “Blue Economy” — fish and seafood

Fisheries are an important component of the national food security system and a promising export sphere for India. The main areas of the development of fisheries in India are defined in the 2017 National Policy on Marine Fisheries Strategy and include the following: increasing fish catches, including through the development of deep-sea fishing and net-pen fish farming in the high seas, involving large segments of population in fishing, reducing fishing losses, the introduction of principles of sustainable development in fishing, etc. Meanwhile, regulations in the field of fishing in India vary significantly across states, which impedes the sustainable development of the sector and leads to overfishing. In addition, cases of bacterial, fungal, parasitic and viral infections affecting fish in Indian aquaculture have become more frequent, which is a direct consequence of the intensification of manufacturing of this type of product in the country.

2.3.2.4. Key agricultural producers

The largest agricultural holdings in India[4]

ITC Limited

Activities	Production, processing, distribution, export
Industry	Grain, animal feed, seafood, ready-to-eat products, FMCG products, tobacco
Description	One of India's leading diversified conglomerates, founded in 1910, whose activities span agribusiness, information technology, consumer goods, food and beverage, hotels and restaurants, packaging, and FMCG marketing. The conglomerate operates more than 15 subsidiaries and 25 world-famous food and beverage brands. ITC Limited's preeminent position as one of India's leading corporations in the agricultural sector is based on strong and long-term partnerships with farmers and one of the most developed supply chains. As one of the largest exporters of agricultural products in the country, ITC Limited supplies Indian feed ingredients, grains, seafood, processed fruits and coffee to foreign markets. The company's products are exported to more than 80 countries. The company ranks 38th in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 8.7 billion US dollars
Contact Information	**Address:** Virginia House, 37, J. L. Nehru Road, Kolkata **Tel.:** +91 33 2288 9371 **E-mail:** contactus@itc.in **Website:** www.itcportal.com

Adani Wilmar

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, grains and legumes, food ingredients, ready-to-eat products
Description	Indian multinational food and beverage conglomerate based in Ahmedabad, which is part of Adani Group. The company was founded in 1999 as a joint venture of Adani Enterprises and Wilmar International. It is India's largest oil processor. The company operates 23 plants in 10 Indian states. Adani Wilmar's Export Division began its activities in 2004 and today it is present throughout the world. North America, the Middle East, Southeast Asia and Africa are among the company's key export destinations. The company ranks 47th in Fortune 500 India rating, in 2022-2023 its revenue amounted to 6.5 billion US dollars
Contact Information	**Address:** Fortune House, Nr Navrangpura Railway Crossing, Ahmedabad 380 009, Gujarat **Tel.:** +91 79 2645 5650 **E-mail:** info@adaniwilmar.in **Website:** www.adaniwilmar.com

[4] According to the India Fortune 500 rating: https://clck.ru/3Ayijv

Godrej Group

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, grain, meat, dairy, ready-to-eat products, animal feed
Description	One of the largest Indian conglomerates, founded in 1897, which covers such areas as agriculture, food and consumer goods manufacturing and distribution, real estate, logistics, chemicals, engineering, finance and the IT sector. Godrej Group operates a number of subsidiaries, including: Godrej Industries (2.8 billion US dollars revenue in 2022-2023, ranked 98th by Fortune 500 India) specializes in the production and sale of FMCG goods, household chemicals, agrochemicals, edible oil products, real estate and retail; Godrej Agrovet (1.1 billion US dollars revenue in 2022-2023) operates in the agro-industrial complex, including the meat, dairy, grains, oil and fat and feed industries. Godrej Group supplies product to over 90 countries and is highly regarded internationally with over 1.1 billion consumers
Contact Information	**Address:** Pirojshanagar, Vikhroli, Mumbai **Tel.:** +91 22 6796 5656; +91 22 7116 5656 **Website:** www.godrej.com

Britannia Industries

Activities	Production, distribution, import, export
Industry	Confectionery, dairy, ready-to-eat products
Description	One of the leading food manufacturing companies in India, currently owned by Waida Holding Group. Founded in 1892, the company is one of the oldest and most recognized brands in the country. Britannia produces a wide range of food and beverage products, including flour, chocolate confectionery, snacks and dairy products, which are widely known not only in India but also in many countries around the world. As of 2023, about 80% of Britannia's annual income comes from the sale of cookies, and 10% from the sale of dairy products. The company ranks 133rd in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 2.0 billion US dollars
Contact Information	**Address:** Prestige Shantiniketan, Tower C, 16th & 17th Floor, Whitefield, Bangalore — 560 048 Karnataka **Tel.:** +91 80 3768 7100 **E-mail:** feedback@britindia.com **Website:** www.britannia.co.in

Gokul Agro Resourses

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, animal feed
Description	The company is one of the largest producers and processors of edible oils and related products. In addition to the production of oils and cooking fats Gokul Agro Resources also specializes in the production of high-quality castor oil and feed additives based on soybean meal, rapeseed meal and mustard meal. The company operates manufacturing facilities in 14 Indian states, as well as 2 branches in Indonesia and Singapore. The company's products are exported to many countries in the Asian region and are in high demand among consumers. The company ranks 225th in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 1.1 billion US dollars
Contact Information	**Address:** Crown 3, Inspire Business Park, Shantigram, Nr. Vaishnodevi Circle, S.G. Highway, Ahmedabad — 382421, Gujarat **Tel.:** +91 90 9990 8537 **E-mail:** garl@gokulagro.com **Website:** www.gokulagro.com

Patanjali Foods Limited

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, confectionery, ready-to-eat products
Description	Since its inception in 1986, Patanjali Foods Limited (formerly known as Ruchi Soya Industries Limited) has turned into a major player in the edible oil industry. The company is among the leading players in the FMCG market as one of the dominant manufacturers of edible oils, cooking fats, flour confectionery products and soy products, it operates 22 production units with a total capacity of more than 11 thousand tons/day, seed grinding capacity — 11 thousand tons/day and packaging capacity — 10 thousand tons/day. Patanjali Foods Limited is also one of the largest exporters of feed additives such as meal and mill cake to markets in over 40 countries. The company ranks 82nd in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 3.4 billion US dollars
Contact Information	**Address:** 601, Part B-2, Metro Tower 6th Floor, Vijay Nagar, AB Road Indore **Tel.:** +91 731 4767 109 / 4767 110 **E-mail:** corporate@patanjalifoods.co.in **Website:** www.patanjalifoods.com

LT Food

Activities	Production, processing, distribution, export
Industry	Grains, legumes
Description	Founded in 1978, the company is a leading manufacturer and exporter of rice and other specialty food products. As one of the largest rice exporters in India, LT Foods is active on the international market, exporting its products to all regions of the world. The company operates several famous rice brands such as Daawat Royal, Ecolife. These brands are widely recognized and trusted by consumers due to the high quality of their products. LT Foods attaches great importance to innovation and the quality of its products, constantly introducing new technologies and production methods to ensure a high standard of quality for its products. The company ranks 291st in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 0.9 billion US dollars
Contact Information	**Address:** 601, Part B-2, Metro Tower 6th Floor, Vijay Nagar, AB Road Indore **Tel.:** +91 124 3055 100 **E-mail:** ir@ltgroup.in **Website:** www.ltgroup.in

Hatsun Agro Product Limited

Activities	Production, processing, distribution, import, export
Industry	Dairy, confectionery, animal feed, ready-to-eat products
Description	Hatsun Agro Product Limited, founded in 1970, is India's leading dairy company headquartered in Chennai, with a significant share of its products exported to 42 countries, primarily to the markets of the Middle East and South Asia. It operates 19 factories, as well as one of the most developed distribution networks, covering more than 3.3 thousand retail outlets daily. Under the Santosa brand, the company produces and sells cattle feed to farmers depending on their needs. The company ranks 293rd in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 0.9 billion US dollars
Contact Information	**Address:** Plot No. 14, Tamil Nadu Housing Board, A Road, Sholinganallur, Chennai **Tel.:** +91 44 2450 1622 **E-mail:** info@hap.in **Website:** www.patanjalifoods.com

Tata Consumer Products

Activities	Production, distribution, export, HoReCa
Industry	Drinks, ready-to-eat products, FMCG products
Description	A leading food and beverage company owned by the Indian conglomerate Tata Group. The company sells a wide range of food and beverage products, including tea, coffee, water, juices, carbonated drinks, plant-based meat analogues and spices under Tata brands Tea, Tetley, Himalayan, Eight O'Clock Coffee and many others. Tata Consumer Products has a significant international presence and exports its products to over 40 countries and operates factories located in the US, the EU, Africa and Asia. Tata Consumer Products Management also pays attention to social responsibility and sustainable development, implementing programmes for environmental protection, social support and community development. The company ranks 159th in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 1.7 billion US dollars
Contact Information	**Address:** 11/13, Botawala building, 1st floor, Office #2-6 Horniman Circle Fort, Mumbai **E-mail:** nidhi.verma@tataconsumer.com **Website:** www.tataconsumer.com

Avanti Feeds Limited

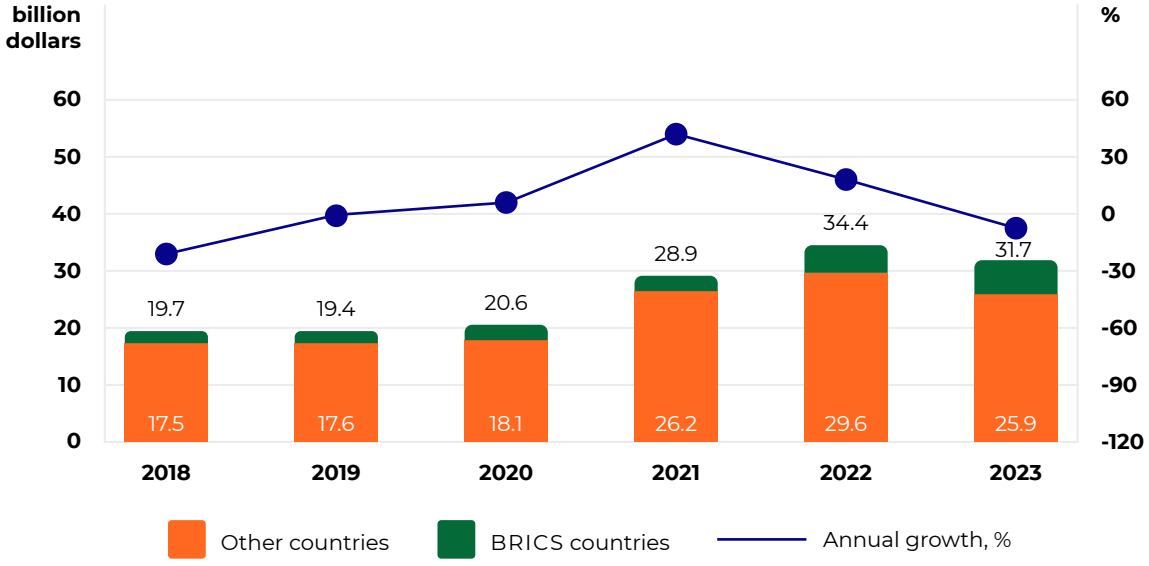
Activities	Production, processing, distribution, import, export
Industry	Animal feed, fish
Description	A leading Indian company in the production and export of aquaculture products such as shrimp, with a wide international presence, which also specializes in feed production, aquatic farm management and fingerling farming. Avanti Frozen (a subsidiary focused on shrimp exports) has two highly developed shrimp processing and export facilities, state-of-the-art in-house laboratories and international food safety standards. The enterprises have a total capacity of 22 thousand tons and provide products to the markets of Europe, the USA, Japan, the Republic of Korea, China, Russia, Canada and the Middle East. The company ranks 386th in the Fortune 500 India rating, in 2022-2023 its revenue amounted to 0.6 billion US dollars
Contact Information	**Address:** G-2, Concorde Apartments, 6-3-658, Somajiguda, Hyderabad-500082 Telangana **Tel.:** +91 40 2331 0260 **E-mail:** avantiho@avantifeeds.com **Website:** https://avantifeeds.com

2.3.3. Foreign trade in agricultural products

2.3.3.1. Import of agricultural products

In 2023 Indian import of agricultural products amounted to 31.7 billion US dollars, which is 8.0% (-2.7 billion US dollars) below the 2022 level. In 2023 import from the BRICS countries increased by 20.2% (+1.0 billion US dollars) compared to the previous year, while import from other countries decreased by 12.5% (-3.7 billion US dollars). Volume of import of agricultural products in 2018–2023 increased by an average of 9.9% per year.

Import of agricultural products of India, 2018-2023, billion US dollars



Source: ITC Trade Map

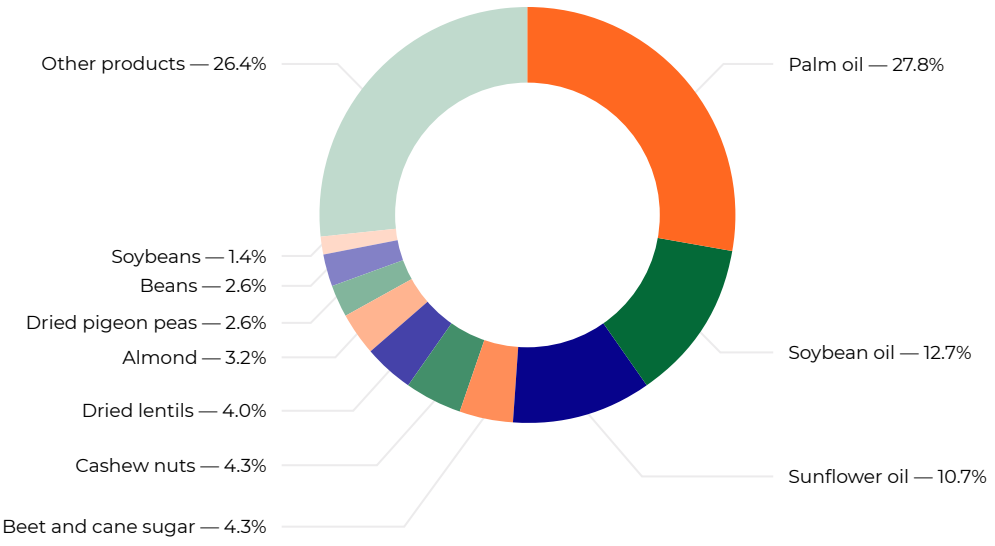
At the end of 2023 the structure of India's import was dominated by palm oil (27.8% of import value). The top 5 imported agricultural products also included soybean oil (12.7%), sunflower oil (10.7%), beet and sugar cane (4.3%) and cashew nuts (4.3%). In total the top 10 commodity items accounted for 73.6% of Indian import of agricultural products in value terms.

Import structure of Indian agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Palm oil	5,478.1	5,408.9	5,119.3	9,568.5	11,728.7	8,786.8	-2,942.0	-25.1
2	Soybean oil	2,279.5	2,267.3	2,986.4	4,750.9	6,095.8	4,031.2	-2,064.5	-33.9
3	Sunflower oil	1,901.3	1,795.3	2,077.6	2,433.6	3,034.3	3,389.2	354.9	11.7
4	Beet and cane sugar	581.6	305.1	641.6	183.0	251.3	1,365.5	1,114.2	5.4 times
5	Cashew nuts	1,747.6	1,138.1	1,111.2	1,150.5	1,902.9	1,358.7	-544.2	-28.6
6	Dried lentils	91.9	346.3	580.9	525.8	543.4	1,251.2	707.8	2.3 times
7	Almond	821.2	850.7	927.4	978.4	1,019.7	1,018.5	-1.3	-0.1
8	Dried pigeon peas	203.6	310.1	303.5	514.1	633.8	833.0	199.2	31.4
9	Beans	414.1	420.9	475.2	881.7	721.9	809.2	87.4	12.1
10	Soybeans	78.6	112.3	292.1	488.4	416.4	458.2	41.7	10.0
	Other products	6,117.8	6,412.5	6,068.1	7,464.1	8,045.7	8,356.0	310.2	3.9
	Total	**19,715.3**	**19,367.7**	**20,583.3**	**28,939.0**	**34,394.1**	**31,657.6**	**-2,736.5**	**-8.0**

Source: ITC Trade Map

Import structure of Indian agricultural products in value terms, 2023, %



Source: ITC Trade Map

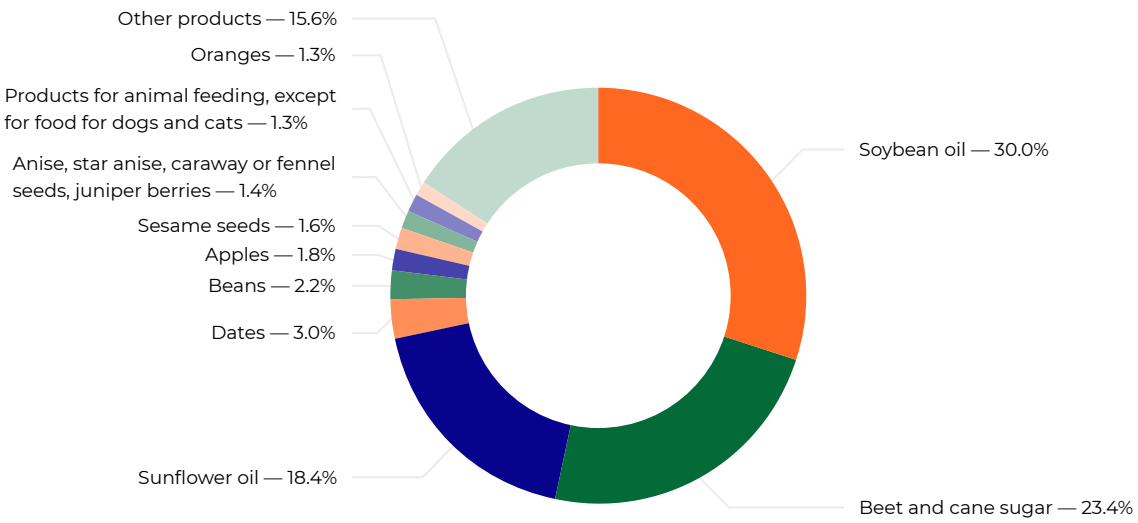
At the end 2023 the structure of India's import from the BRICS countries was dominated by soybean oil (30.0% of import value). The top 5 imported agricultural products also included beet and cane sugar (23.4%), sunflower oil (18.4%), dates (3.0%) and beans (2.2%). In total the top 10 commodity items accounted for 84.4% of Indian import of agricultural products from the BRICS countries in value terms.

Import structure of Indian agricultural products from the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybean oil	563.2	238.4	368.6	703.3	2,320.4	1,727.0	-593.4	-25.6
2	Beet and cane sugar	570.1	291.7	631.9	168.0	245.8	1,343.4	1,097.5	5.5 times
3	Sunflower oil	0.0002	157.5	353.7	302.6	803.2	1,059.8	256.6	31.9
4	Dates	61.4	76.3	128.0	128.7	133.8	172.3	38.4	28.7
5	Beans	111.8	130.2	102.1	162.3	111.3	128.2	16.9	15.2
6	Apples	20.2	14.6	30.4	107.2	77.5	101.3	23.9	30.8
7	Sesame seeds	4.0	2.3	16.6	12.5	4.7	94.7	90.0	20.1 times
8	Anise, star anise, caraway or fennel seeds, juniper berries	2.4	2.5	9.7	8.3	3.6	80.5	76.8	22.2 times
9	Products for animal feeding, except for food for dogs and cats	58.1	58.0	60.2	75.8	68.2	74.2	6.0	8.7
10	Oranges	45.4	35.6	25.1	87.4	65.9	71.9	6.0	9.1
	Other products	805.3	739.0	753.7	938.1	949.7	899.2	-50.4	-5.3
	Total	**2,242.0**	**1,746.1**	**2,480.0**	**2,694.2**	**4,784.2**	**5,752.4**	**968.2**	**20.2**

Source: ITC Trade Map

Import structure of Indian agricultural products from the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

In 2023 the structure of India's import from other countries was dominated by palm oil (33.8% of import value). The top 5 imported agricultural products also included sunflower oil (9.0%), soybean oil (8.9%), cashew nuts (5.2%) and dried lentils (4.7%). In total the top 10 commodity items accounted for 74.5% of Indian agricultural products import from other countries.

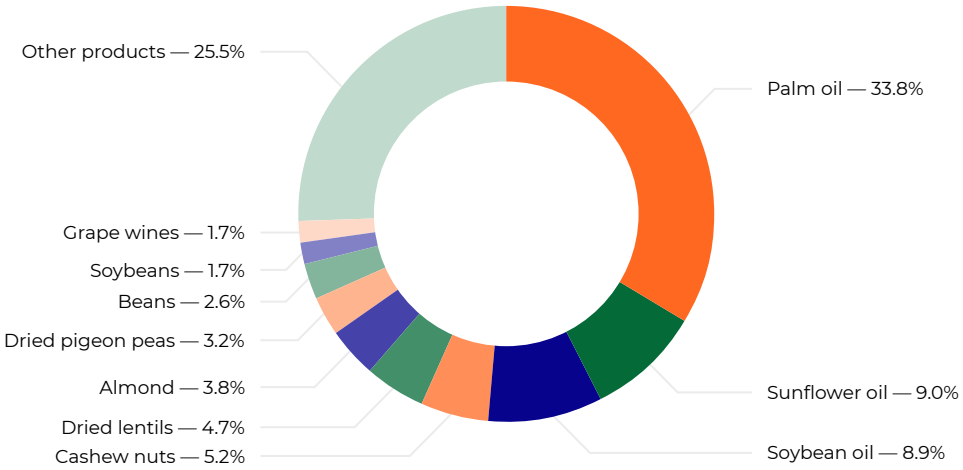
Import structure of Indian agricultural products from other countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Palm oil	5,478.1	5,408.9	5,119.3	9,568.5	11,728.7	8,748.8	-2,979.9	-25.4
2	Sunflower oil	1,901.3	1,637.8	1,723.9	2,131.0	2,231.1	2,329.5	98.3	4.4
3	Soybean oil	1,716.3	2,028.8	2,617.8	4,047.6	3,775.4	2,304.3	-1,471.1	-39.0
4	Cashew nuts	1,672.9	1,062.1	1,067.7	1,096.4	1,856.5	1,342.1	-514.3	-27.7
5	Dried lentils	91.4	344.8	568.5	521.7	538.8	1,211.7	672.9	2.2 times
6	Almond	798.5	830.3	901.4	915.2	998.9	989.4	-9.5	-1.0
7	Dried pigeon peas	203.3	309.2	301.8	511.7	632.2	832.1	199.8	31.6
8	Beans	302.3	290.7	373.1	719.4	610.6	681.1	70.5	11.5
9	Soybeans	47.3	54.5	260.2	444.6	388.7	431.3	42.7	11.0

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
10	Grape wines	26.5	20.8	12.4	22.8	31.8	431.2	399.4	13.5 times
	Other products	5,235.4	5,633.4	5,157.3	6,265.9	6,817.2	6,603.8	-213.4	-3.1
	Total	**17,473.3**	**17,621.5**	**18,103.3**	**26,244.8**	**29,609.9**	**25,905.2**	**-3,704.7**	**-12.5**

Source: ITC Trade Map

Import structure of Indian agricultural products from other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest exporters of agricultural products to India were Brazil (9.9% of import in value terms), Russia (4.1%), China (1.4%) and the UAE (1.3%). In total BRICS countries accounted for 18.2% of Indian import of agricultural products.

Moreover, in 2023 the largest exporting countries included Indonesia (16.2% of import in value terms), Malaysia (8.2%) and Argentina (6.7%). Collectively, the top 10 countries accounted for 60.9% of Indian import of agricultural products in value terms.

The main countries exporting agricultural products to India in value terms, 2018-2023, million US dollars

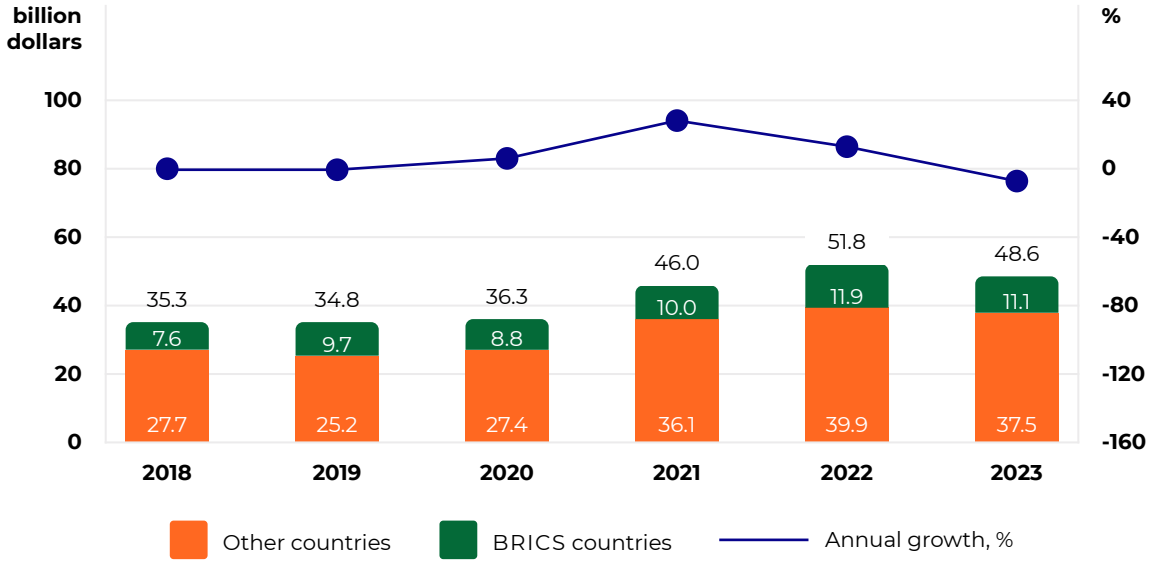
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Brazil	1,181.3	573.2	984.0	1,053.3	2,622.8	3,148.9	526.1	20.1
2	Russia	94.0	225.3	457.3	314.9	936.9	1,301.0	364.1	38.9
3	China	290.6	321.2	336.4	358.0	376.5	448.9	72.4	19.2
4	UAE	380.6	311.6	362.4	456.2	339.6	406.6	67.0	19.7
5	Iran	118.4	68.8	123.8	219.1	167.3	152.6	-14.7	-8.8
6	South Africa	46.3	88.9	67.7	90.6	115.9	106.4	-9.6	-8.3
7	Egypt	58.2	50.2	107.1	125.3	87.7	88.9	1.2	1.4
8	Ethiopia	50.5	86.3	25.4	55.1	37.6	59.9	22.3	59.3
9	Saudi Arabia	22.1	20.6	15.9	21.6	99.9	39.2	-60.7	-60.8
	Total BRICS	**2,242.0**	**1,746.1**	**2,480.0**	**2,694.2**	**4,784.2**	**5,752.4**	**968.2**	**20.2**
1	Indonesia	4,080.6	3,049.8	3,680.6	4,481.3	6,167.5	5,137.3	-1,030.2	-16.7
2	Malaysia	1,417.7	2,360.8	1,610.4	4,253.6	4,066.8	2,601.2	-1,465.6	-36.0
3	Argentina	1,647.8	1,857.3	2,258.8	3,264.1	3,614.9	2,133.5	-1,481.4	-41.0
4	USA	1,419.0	1,428.3	1,402.8	1,432.2	1,746.7	1,389.2	-357.5	-20.5
5	Thailand	392.1	256.9	269.3	814.5	1,525.0	1,118.2	-406.9	-26.7
6	Myanmar	316.4	378.9	479.1	688.8	858.7	911.2	52.5	6.1
7	Singapore	493.5	531.3	372.7	628.9	676.6	798.5	121.9	18.0
8	Romania	6.5	9.4	0.5	23.1	126.5	743.1	616.5	5.9 times
9	Australia	254.6	162.7	182.2	297.5	338.9	738.0	399.0	2.2 times
10	Canada	128.6	463.1	534.8	435.9	346.9	694.0	347.1	2.0 times
	Other countries	7,316.5	7,123.1	7,312.1	9,925.0	10,141.3	9,641.2	-500.1	-4.9
	Total non-BRICS	**17,473.3**	**17,621.5**	**18,103.3**	**26,244.8**	**29,609.9**	**25,905.2**	**-3,704.7**	**-12.5**
	Total	**19,715.3**	**19,367.7**	**20,583.3**	**28,939.0**	**34,394.1**	**31,657.6**	**-2,736.5**	**-8.0**

Source: ITC Trade Map

2.3.3.2. Export of agricultural products

In 2023 export of Indian agricultural products amounted to 48.6 billion US dollars, which is 6.1% (-3.2 billion US dollars) below the level of 2022. In 2023 export to the BRICS countries decreased compared to the previous year by 6.7% (-796.0 million US dollars) and export to other countries went down by 5.9% (-2.4 billion US dollars). In 2018-2023 Indian agricultural export grew at an average annual rate of 6.6%.

Export of agricultural products of India, 2018-2023, billion US dollars



Source: ITC Trade Map

The main export product of India's agro-industrial complex in 2023 was rice (21.5%). A significant share of export also came from crustaceans (9.1%), beet and sugar cane (7.6%), as well as beef and cattle by-products (7.3%). In total the top 10 exported types of products accounted for 58.2% of the export value of Indian agricultural products.

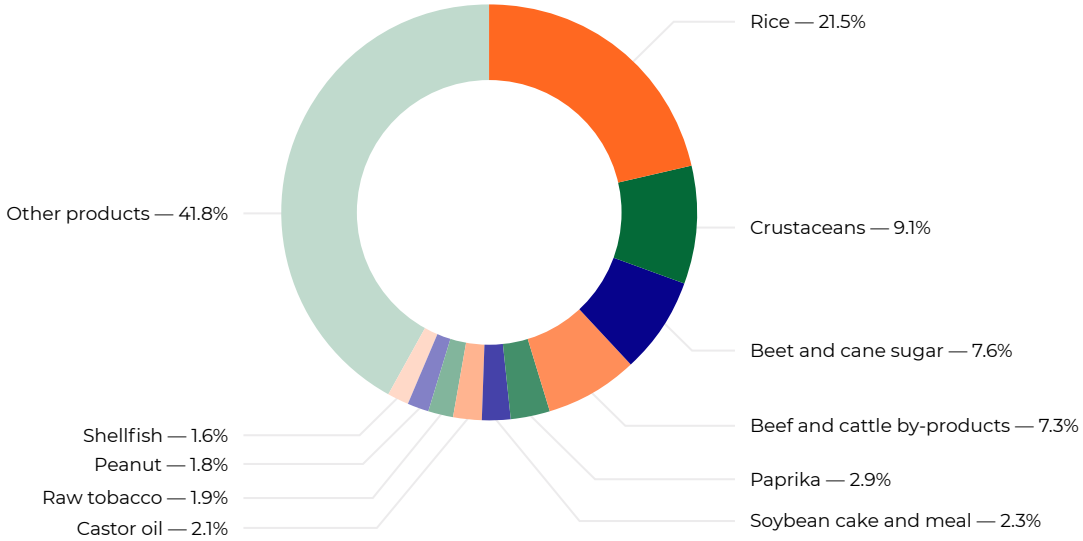
Export structure of Indian agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Rice	7,346.2	6,800.7	7,980.0	9,623.6	10,766.6	10,463.2	-303.5	-2.8
2	Crustaceans	4,482.4	4,676.9	3,884.3	5,253.9	4,907.5	4,429.6	-478.0	-9.7
3	Beet and cane sugar	928.5	1,712.6	2,494.6	3,813.1	5,742.0	3,719.2	-2,022.8	-35.2
4	Beef and cattle by-products	3,602.1	3,338.4	3,050.7	3,315.5	3,172.3	3,566.2	393.9	12.4
5	Paprika	772.3	929.2	1,167.2	1,306.4	1,175.0	1,414.5	239.5	20.4

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
6	Soybean cake and meal	891.4	744.4	701.4	900.8	574.3	1,115.8	541.5	94.3
7	Castor oil	821.2	856.9	799.0	1,050.3	1,090.1	1,009.7	-80.5	-7.4
8	Raw tobacco	579.7	544.8	504.0	545.7	800.3	947.0	146.6	18.3
9	Peanut	456.6	619.0	750.4	688.4	711.6	874.4	162.9	22.9
10	Shellfish	772.9	718.9	529.7	693.9	858.3	763.3	-95.0	-11.1
	Other products	14,623.4	13,888.0	14,405.1	18,856.6	21,984.4	20,326.8	-1,657.6	-7.5
	Total	**35,276.8**	**34,829.8**	**36,266.4**	**46,048.0**	**51,782.4**	**48,629.6**	**-3,152.9**	**-6.1**

Source: ITC Trade Map

Export structure of Indian agricultural products in value terms, 2023, %



Source: ITC Trade Map

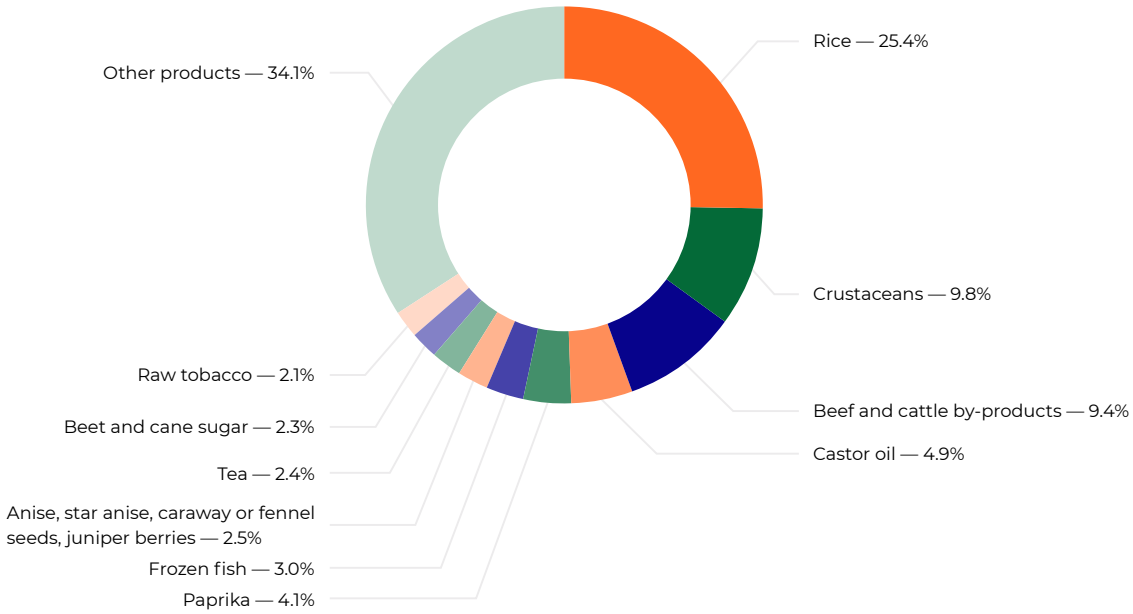
In 2023 Indian agricultural export to the BRICS countries was dominated by rice (25.4%), crustaceans (9.8%), beef and cattle by-products (9.4%) and castor oil (4.9%). In total the top 10 exported types of products accounted for 65.9% of the export value of Indian agricultural products.

Export structure of Indian agricultural products to the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Rice	2,856.8	3,099.0	2,603.5	2,368.8	3,480.5	2,824.8	-655.7	-18.8
2	Crustaceans	553.2	1,243.2	836.3	1,092.1	1,221.9	1,088.8	-133.1	-10.9
3	Beef and cattle by-products	384.8	581.2	550.1	1,005.7	850.6	1,043.9	193.2	22.7
4	Castor oil	413.2	399.0	412.3	532.9	538.7	540.7	2.0	0.4
5	Paprika	96.1	333.2	448.6	532.2	371.4	454.6	83.2	22.4
6	Frozen fish	246.8	316.2	238.6	160.2	268.9	333.8	64.9	24.1
7	Anise, star anise, caraway or fennel seeds, juniper berries	68.6	175.1	247.0	217.8	183.9	280.9	97.0	52.8
8	Tea	350.9	430.0	309.3	279.8	373.3	267.5	-105.8	-28.4
9	Beet and cane sugar	89.2	376.9	510.7	574.0	891.9	250.1	-641.8	-72.0
10	Raw tobacco	82.7	85.7	78.2	89.9	133.2	228.2	94.9	71.3
	Other products	2,432.5	2,612.5	2,595.5	3,115.8	3,584.1	3,789.2	205.1	5.7
	Total	**7,574.9**	**9,651.9**	**8,830.0**	**9,969.4**	**11,898.3**	**11,102.3**	**-796.0**	**-6.7**

Source: ITC Trade Map

Export structure of Indian agricultural products to the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

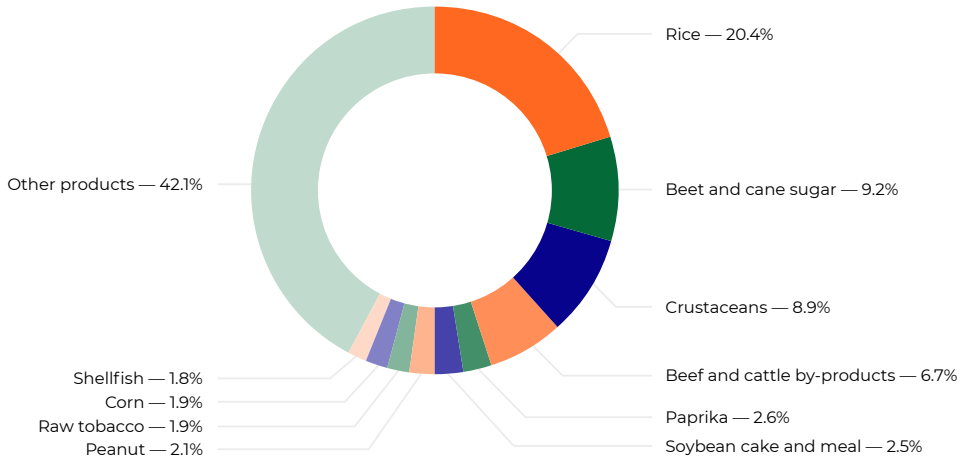
In 2023 Indian agricultural export to other countries was dominated by rice (20.4%), beet and cane sugar (9.2%), crustaceans (8.9%), as well as beef and cattle by-products (6.7%). In total the top 10 exported types of products accounted for 57.9% of the export value of Indian agricultural products.

Export structure of Indian agricultural products to other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Rice	4,489.4	3,701.7	5,376.5	7,254.7	7,286.1	7,638.3	352.2	4.8
2	Beet and cane sugar	839.3	1,335.7	1,984.0	3,239.0	4,850.1	3,469.1	-1,381.0	-28.5
3	Crustaceans	3,929.2	3,433.8	3,048.0	4,161.8	3,685.6	3,340.7	-344.9	-9.4
4	Beef and cattle by-products	3,217.3	2,757.2	2,500.6	2,309.8	2,321.7	2,522.4	200.7	8.6
5	Paprika	676.1	596.0	718.7	774.2	803.6	959.9	156.3	19.4
6	Soybean cake and meal	785.1	558.8	648.6	876.1	559.9	919.4	359.5	64.2
7	Peanut	429.9	548.1	635.0	626.9	658.4	793.2	134.8	20.5
8	Raw tobacco	497.1	459.1	425.8	455.8	667.1	718.8	51.7	7.7
9	Corn	250.4	141.3	388.1	929.6	1,114.1	696.9	-417.2	-37.5
10	Shellfish	732.4	623.1	462.6	604.9	771.6	666.0	-105.6	-13.7
	Other products	11,855.8	11,023.2	11,248.5	14,845.8	17,165.8	15,802.5	-1,363.3	-7.9
	Total	**27,702.0**	**25,177.9**	**27,436.4**	**36,078.6**	**39,884.1**	**37,527.2**	**-2,356.9**	**-5.9**

Source: ITC Trade Map

Export structure of Indian agricultural products to other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest importers of Indian agricultural products included China (6.6% of export in value terms), the UAE (6.1%) and Saudi Arabia (4.4%). The BRICS countries collectively accounted for 22.8% of India's agricultural export.

Moreover, the United States (10.3% of export in value terms), Vietnam (5.4%) and Bangladesh (4.9%) were among the largest importing countries in 2023. In total the top 10 importing countries accounted for 48.5% of Indian agricultural export in 2023.

The main importing countries of agricultural products from India in value terms, 2018–2023, million US dollars

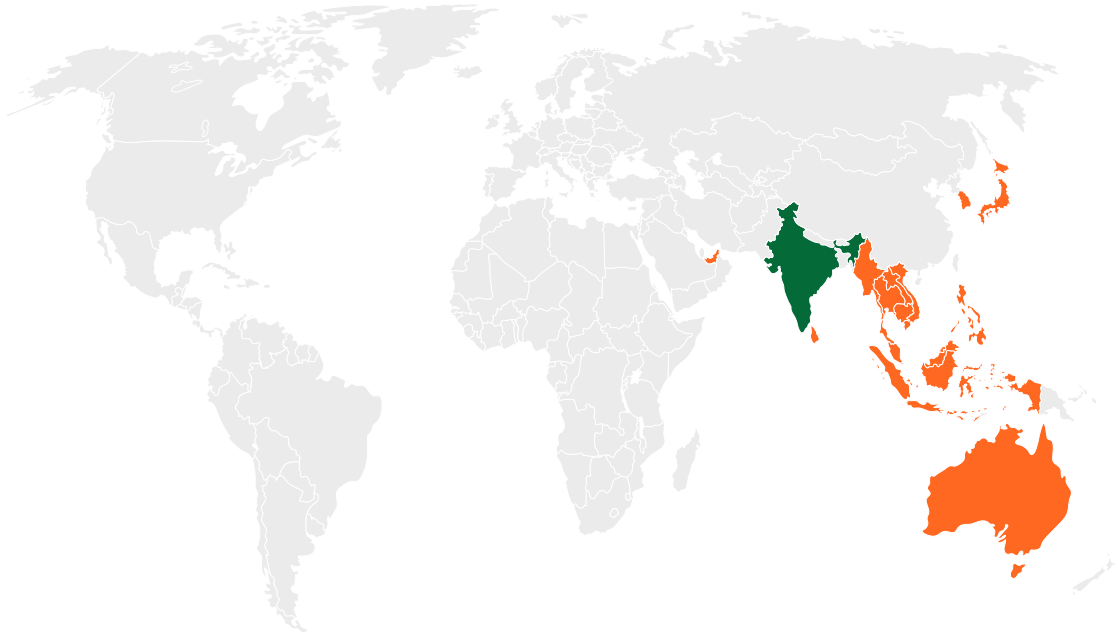
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	1,247.9	2,459.3	2,470.1	3,125.3	3,606.3	3,185.4	-420.9	-11.7
2	UAE	2,028.2	1,788.7	1,844.0	2,503.5	3,001.6	2,951.8	-49.8	-1.7
3	Saudi Arabia	1,593.1	1,672.8	1,633.5	1,556.3	2,020.0	2,126.2	106.2	5.3
4	Iran	1,563.8	2,290.6	1,554.4	938.1	1,504.4	1,019.2	-485.3	-32.3
5	Russia	573.8	613.9	523.2	618.1	710.9	748.5	37.6	5.3
6	Egypt	288.3	530.0	455.7	883.4	717.2	692.4	-24.8	-3.5
7	South Africa	171.3	189.5	208.1	216.8	216.8	266.5	49.7	22.9
8	Brazil	61.2	66.6	83.3	69.5	76.0	96.9	20.8	27.4
9	Ethiopia	47.3	40.4	57.6	58.3	45.1	15.6	-29.4	-65.3
	Total BRICS	**7,574.9**	**9,651.9**	**8,830.0**	**9,969.4**	**11,898.3**	**11,102.3**	**-796.0**	**-6.7**
1	USA	4,621.2	4,744.7	4,707.9	5,710.8	5,434.6	5,010.1	-424.5	-7.8
2	Vietnam	3,846.0	2,130.5	1,144.2	1,939.2	1,940.3	2,628.8	688.5	35.5
3	Bangladesh	925.9	777.8	1,364.0	3,689.8	3,293.4	2,381.7	-911.7	-27.7
4	Malaysia	865.5	862.3	1,139.1	1,457.8	1,770.3	1,644.3	-126.0	-7.1
5	Iraq	652.2	706.7	814.2	889.2	964.6	1,436.5	471.9	48.9
6	Indonesia	849.8	742.7	984.8	1,965.2	2,150.5	1,191.8	-958.8	-44.6
7	Thailand	685.3	667.9	571.7	710.6	959.3	1,021.6	62.3	6.5
8	Nepal	891.5	866.8	1,103.4	1,357.0	1,119.2	981.4	-137.8	-12.3
9	United Kingdom	683.4	712.5	761.8	816.2	772.3	959.3	187.0	24.2
10	Netherlands	820.8	853.4	776.8	968.8	1,018.2	925.1	-93.1	-9.1
	Other countries	12,860.4	12,112.5	14,068.7	16,574.0	20,461.3	19,346.6	-1,114.7	-5.4
	Total non-BRICS	**27,702.0**	**25,177.9**	**27,436.4**	**36,078.6**	**39,884.1**	**37,527.2**	**-2,356.9**	**-5.9**
	Total	**35,276.8**	**34,829.8**	**36,266.4**	**46,048.0**	**51,782.4**	**48,629.6**	**-3,152.9**	**-6.1**

Source: ITC Trade Map

2.3.3.3. International cooperation

At the bilateral level India has preferential trade agreements with Sri Lanka, Singapore, the Association of Southeast Asian Nations (ASEAN), the Republic of Korea, Malaysia, Japan, Australia and the UAE.

Indian trade agreements



State/association with which India has entered into a preferential trade agreement	Effective date of the agreement
Sri Lanka	2000
Singapore	2005
Association of Southeast Asian Nations (ASEAN): Brunei, Myanmar, Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Vietnam, Thailand	2010
South Korea	2010
Malaysia	2011
Japan	2011
Australia	2022
UAE	2022

2.3.3.4. Special economic zones

As of February 2024 India had 424 official approvals for special economic zones (SEZs) and 278 operational SEZs[5]. Moreover, these were both diversified zones and zones that had target sectors.

Among the SEZs targeting the food sector, one can highlight Pearl City FoodPort and Falta. The first brings together investors in the food industry from all over the world and is located 30 km from the Tuticorin port. The second, along with other areas, helps to develop food industry enterprises, mainly tea producers, and is located 55 km from the center of Kolkata. In addition SEZs targeting the food sector comprise: Visakhapatnam in Kakinada, Andhra Pradesh; KIADB Food Processing in Hassan, Karnataka; KINFRA (FOOD PROCESSING) located near Kozhikode in Kerala.

The Government of India provides tax and non-tax incentives to investors in selected sectors and regions (North Eastern Region, Jammu and Kashmir, Himachal Pradesh and Uttarakhand). Additional benefits include:

- full exemption from taxes on export profits for the first five years for SEZ facilities, a reduced rate (50%) for the next five years and 50% of reinvested export profits for another five years;
- exemption from service and sales taxes (levied by the central and state governments);
- duty-free regime for purchasing goods on the domestic market for the development, operation and maintenance of FEZ facilities.

Free Trade and Warehousing Zones (FTWZ), which focus on trading and warehousing activities, form another category of India's SEZs. The FTWZ is considered as a foreign territory in terms of trade rules and tariffs. The FTWZ allows for duty-free import of all goods (except those that are prohibited) for storage, resale or re-export.

[5] https://sezindia.nic.in/upload/65d5d533f23cbFact%20Sheet%20on%20SEZ%2019.02.2024.pdf

2.3.3.5. Institutes for supporting the export of agricultural products

Agricultural and Processed Food Products Export Development Authority, APEDA

Description	The Agricultural and Processed Food Products Export Development Authority was founded in 1985 with the aim of developing the export of Indian agro-industrial products. It is a subordinate agency of the Ministry of Commerce and Industry of India. It replaced the Processed Food Export Promotion Council (PFEPC). In addition to export development the Authority monitors the import of sugar and fulfills the functions of the secretariat of the National Accreditation Council regarding the export of organic products
Main goals	• development of export-oriented agricultural sectors by providing financial support measures, as well as other benefits and subsidies; • registration of enterprises as exporters, collection of appropriate duties and other payments; • standardization of export products; • development of export marketing, assistance in the development of export-oriented production; • collection of statistical data used for the development of national export of agricultural products; • educational support for exporters of agricultural products; • sugar import controls
Contact details	**Address:** 3rd Floor, NCUI Building 3, Siri Institutional Area, August Kranti Marg, (Opp. Asiad Village), New Delhi **Tel.:** +91 11 4148 6013 **E-mail:** headq@apeda.gov.in **Website:** https://apeda.gov.in/

Trade Promotion Council of India

Description	Trade Promotion Council of India is one of the leading institutes for export promotion and foreign investment facilitation. It is authorized by the Ministry of Commerce and Industry of India to carry out tasks for the development of the Indian economy by strengthening export and investment potential. One of the Council's objectives is to increase the export of Indian agricultural products
Main goals	• increase in the number of Indian exporting enterprises; • conducting research to find promising export markets and facilitating entry into them; • creation of a platform for interaction between government agencies and the business community in order to develop export and attract foreign investment; • promoting the attraction of foreign investment and creating a favorable investment climate; • issuance of electronic certificates of origin of products
Contact details	**Address:** 9, 2nd Floor, Scindia House, Connaught Circus, New Delhi **Tel.:** +91 11 4072 7272 **E-mail:** info@tpci.in **Website:** https://www.tpci.in/

Expert opinion

Sun Yongli

Chairman, Bejing Hopewise International Trading. Co.

“While China is a large producer and exporter of food, insufficient domestic capacity to meet increasing demand results into import necessity. China is gradually opening its market to agricultural products such as grains, oil, dairy products, meat, seafood, vegetables and fruits from BRICS countries. At the same time Chinese manufactured goods such as clothing, toys, household appliances, equipment, communication tools and vehicles are exported to the member countries from China, this’s a strategic and long-term development plan. Now, according to the pace set by the BRICS member countries, the implementation of projects is very agile. We believe that the complementarity in resources, technology, human resources between the BRICS countries is very strong. Members come together to solve the issues, build effective trade rules. In 5-10 years BRICS should become the most competitive and powerful association in the world.

The expansion of BRICS will establish long-term credible friendly and business relations with a large number of countries, promote more effective dialogue in resolving joint issues, expand investment and trade opportunities between the enterprises. Also, it’ll promote cultural exchange, implement mutual visa-free policies to encourage the development of the tourism sector.”

2.4. China

2.4.1. Social and economic profile

The People's Republic of China is one of the world's largest countries in area, population and economy. About 1.4 billion people lived in China in 2023, at the same time the country demonstrates low population growth rates and in 2022 the figure decreased for the first time since 1961.

The country's area is 9.6 million km^2, among which 5.2 million km^2 is suitable for agriculture. The coastline is more than 18 thousand km. China ranks third largest in the world in territory, second only to Russia and Canada. The length of China's land border is 22.8 thousand km, and the country borders 14 countries.

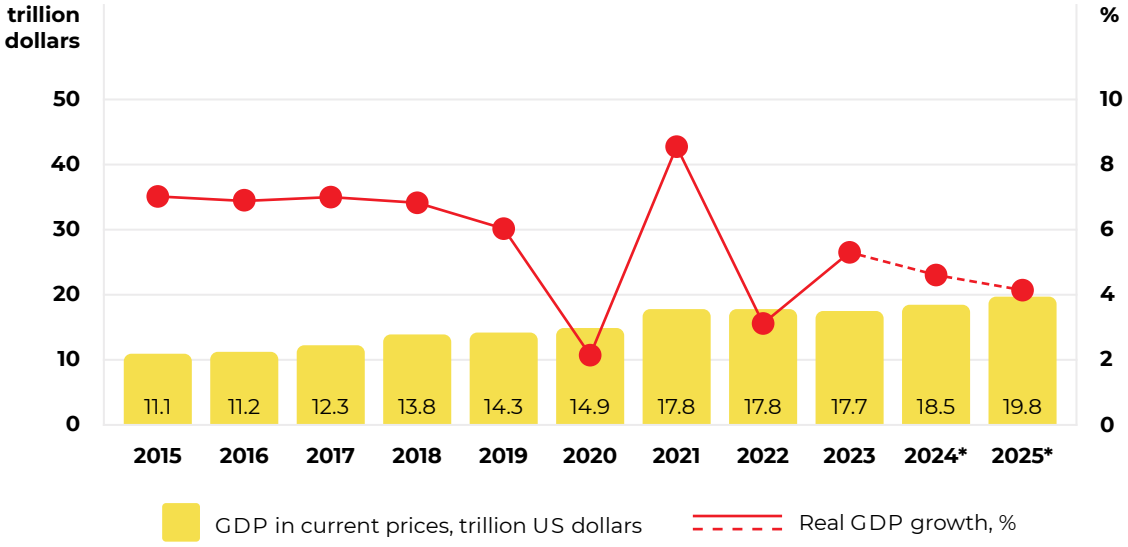
In 2022 the urbanization rate reached 63.6%. At the same time the growth rate of the urban population in China is decreasing annually, amounting to 1.6% in 2022, which is slightly higher than the world average. China ranks second in the world in the volume of FDI received. In 2022 this figure reached a record 189.1 billion US dollars due to increased investment in the industrial and high-tech sectors, growing by 5% compared to 2021.

Agriculture accounts for about 7.3% of China's GDP, while the industrial and service sectors account for 39.9% and 52.8%, respectively. About 22.6% of the population is employed in agriculture, 32.2% in industry and 45.3% in the service sector. In 2022 the unemployment rate in China was 5.0% 2022, the unemployment rate in China was 5.0%. The share of agro-industrial products accounts for about 8.7% of China's import and 2.9% of its export.

China ranks second in the world in terms of nominal GDP, second only to the United States. In 2023 GDP in current prices was 17.7 trillion US dollars. At the same time China is the world leader in terms of GDP by PPP (32.9 trillion US dollars in 2023).

China's economy is gradually recovering from quarantine restrictions caused by the pandemic. At the end of 2022 a zero-tolerance policy for COVID-19 was lifted and the country managed to increase its real GDP growth rate. At the end of 2023 economic growth was 5.2%, primarily due to the deferred demand effect. In 2024 the Chinese government aims to maintain growth rates at 5%. However, it is an extremely difficult task because of the high base in 2023. However, in May 2024 the IMF raised its forecast for China's real GDP growth this year from 4.6% to 5.0%, citing the country's strong economic performance in the first quarter as well as the government's efforts to achieve its goals.

Dynamics of China's GDP in current prices, 2015-2025



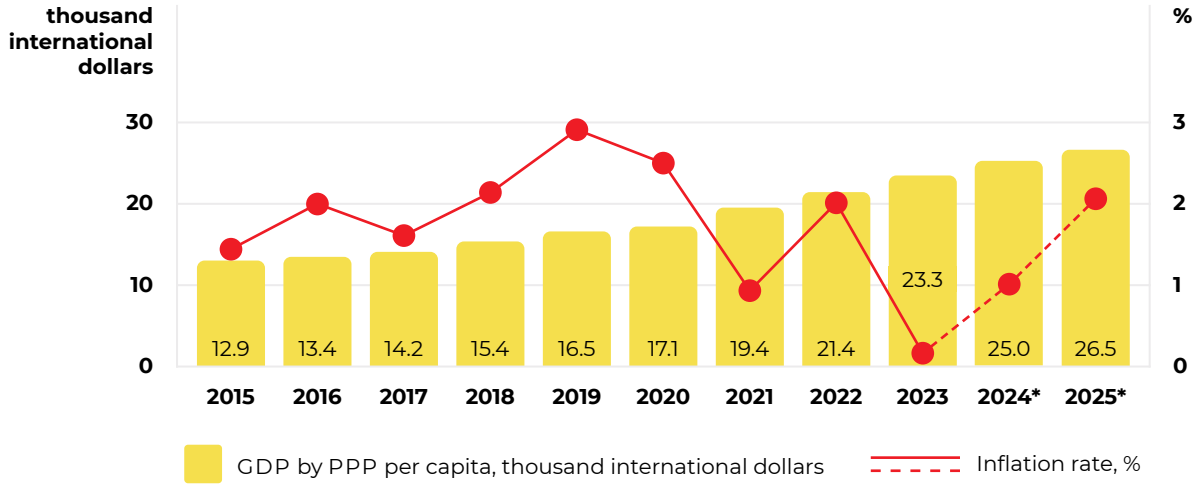
Source: IMF

*Note. *forecast, IMF data as of May 28, 2024.*

In 2023 China GDP by PPP per capita amounted to 23.3 thousand international dollars. According to IMF forecasts by 2025 this indicator may increase to 26.5 thousand thousand international dollars.

One of the main challenges for the modern Chinese economy is the low level of domestic demand and the citizen's propensity to save money caused by the instability of economic development under quarantine restrictions, as well as the crisis in the real estate market. As a result, the country is experiencing low growth rates in consumer prices and there is a risk of deflation. The lowest inflation rates were recorded in 2021 and 2023 — 0.9% and 0.2%, respectively. Nevertheless, the objective of stimulating economic growth and domestic demand requires the People's Bank of China to pursue a relatively loose monetary policy.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

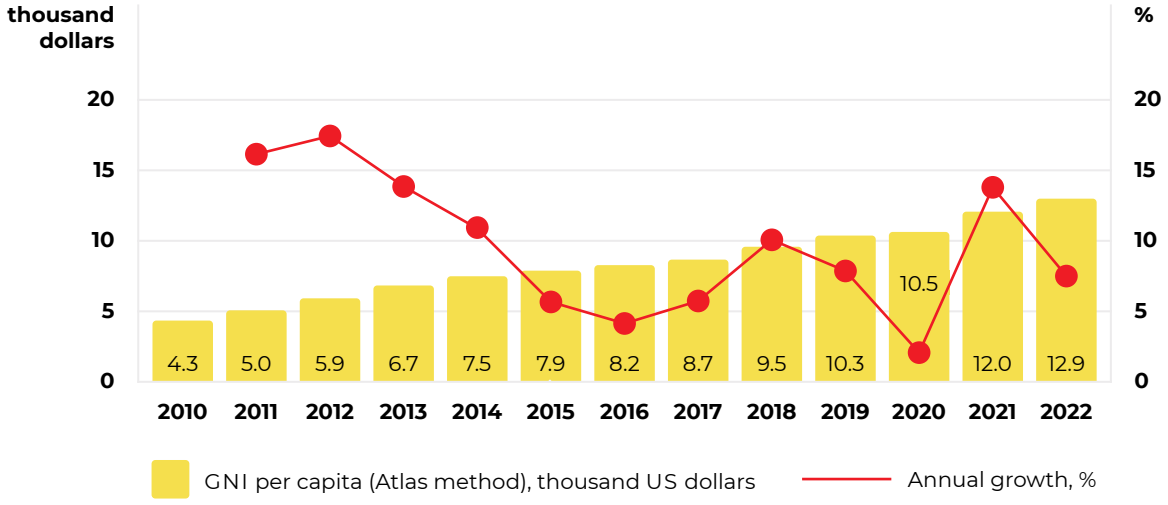


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification based on GNI per capita using the Atlas method, China belongs to the group of countries with upper-middle income. In 2022 China's GNI per capita was 12.9 thousand US dollars. The growing dynamics of China's GNI per capita is a clear reflection of its rapid development. For example, in 2000 this economical indicator was only at the level of 0.9 thousand US dollars and at that period of time the country belonged to the lower-middle income group. The transition to the group of upper-middle income countries took place in 2010. Currently, China is already approaching the upper limit of this group and in the medium term it may move to the group of high-income countries.

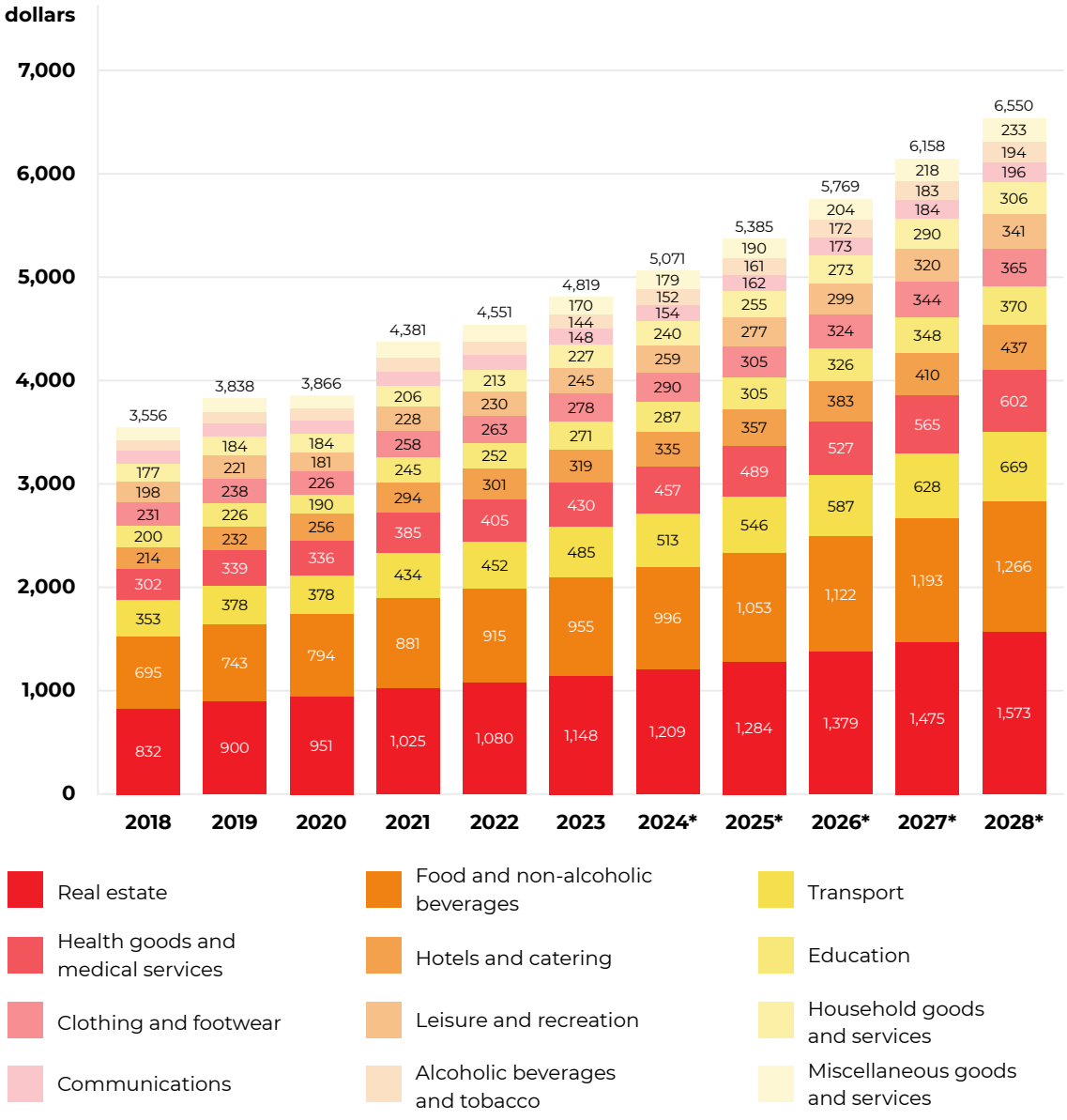
Dynamics of GNI per capita in China, 2010-2022



Source: The World Bank

Final consumption expenditures per capita in 2023 amounted to 4,819 US dollars at constant 2023 prices, 5.9% more than in 2022. The majority of the expenditures accounted for real estate — about 23.8%. Expenditures on food and non-alcoholic beverages accounted for 19.8% and ranked second in the structure of final consumption expenditures. In 2028 final consumption expenditures per capita are projected to reach 6,550 US dollars, among which 1,266 US dollars will be spent on food and non-alcoholic beverages (19.3%).

Final consumption expenditures in China per capita in constant prices 2023, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)
*Note. *forecast.*

2.4.2. Agriculture

2.4.2.1. Crop and livestock production

China is a major manufacturer and exporter of agro-industrial products, but it lacks the internal capacities to meet the existing demand and needs to import goods. Despite the vast territory, the agro-industrial complex is developed unevenly due to natural and climatic differences among other reasons. In addition, China is facing an acute shortage of land and water resources to meet the needs of its nearly one and a half billion people, due to both rising costs from urbanization and declining soil quality from prolonged intensive development.

The country is a major producer of vegetables, root and tubers. The most common are potatoes, whose production reached 95.6 million tons in 2022, cucumbers and gherkins (77.3 million tons) and tomatoes (68.2 million tons).

Cereal crops such as corn, rice and wheat show the highest production volumes. Total grain production in 2022 was 633.3 million tons and in 2023, according to the National Bureau of Statistics of China, the volume reached 641.4 million tons. Corn production in 2023 was 288.8 million tons, an increase of 4.2% from 2022, while rice and wheat production decreased by 0.9% and 0.8% from 2022 respectively. 206.6 million tons of rice and 136.6 million tons of wheat were grown in China at the end of 2023.

The country also produces significant volumes of fruits and berries. In 2022 China grew 63.0 million tons of watermelons and harvested 60.0 million tons of citrus fruits, which is 7.1% more than in 2021. The average annual growth rate of citrus production in China in 2018-2022 was 9.7%. Cultivation of apples also demonstrates significant growth rates. On average in 2018-2022 the production volume was increasing annually by 5.0%, reaching 47.6 million tons by 2022.

Sugar cane production in 2022 amounted to 103.4 million tons, decreasing by 3.1% compared to 2021. The drop in indicators is caused by the low level of mechanization and labor shortage in the regions where this crop is produced.

Production of crop products, million tons

	2018	2019	2020	2021	2022
Vegetables, root and tubers	**664.5**	**682.8**	**684.3**	**692.1**	**704.8**
Potato	90.3	89.5	92.8	94.3	95.6
Cucumbers and gherkins	67.6	70.3	72.9	74.8	77.3
Tomatoes	60.9	62.9	64.7	66.5	68.2
Cereals	**609.9**	**613.4**	**616.6**	**632.6**	**633.3**
Corn	257.2	260.8	260.7	272.6	277.2
Rice	212.1	209.6	211.9	212.8	208.5
Wheat	131.4	133.6	134.3	136.9	137.7
Fruits and berries	**231.8**	**241.2**	**243.5**	**250.8**	**253.4**
Watermelons	61.5	63.2	62.3	61.6	63.0
Citrus	41.4	45.8	51.2	56.0	60.0
Apples	39.2	42.4	44.1	46.0	47.6
Sugar cane	**108.1**	**109.4**	**108.1**	**106.7**	**103.4**

Source: FAOSTAT, NBS

China demonstrates high volumes of livestock production but they are still insufficient to meet domestic needs.

Demand for dairy products is dynamically growing in the country, although they were not part of the traditional Chinese diet historically. However, the westernization of consumer preferences, as well as government efforts to promote the consumption of milk and its beneficial properties, leads to increased demand and supply of this category of goods. In 2018-2022 the average annual growth rate of cow's milk production was 6.4% and in 2022 the indicator reached 39.3 million tons. Production increased to a record 42.0 million tons in 2023, according to the National Bureau of Statistics of China.

China is also the largest meat market. The most popular type is pork and the country ranks the world’s first in its production and consumption. The volume of production in 2022 amounted to 55.4 million tons. In 2023 production of this type of meat increased to 57.9 million tons, which is 4.6% more than in 2022. Poultry meat production in China in 2022 amounted to about 24.4 million tons. Also, the country produced 583.96 billion chicken eggs.

The long coastline allows China to maintain its leading position in terms of fish and seafood production. In 2022 the volume is estimated at 87.5 million tons. Most of the production comes from the developed aquaculture sector.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	536.98	569.08	596.50	586.32	583.96
Cow's milk, million tons	30.7	32.0	34.4	36.8	39.3
Pork, million tons	54.0	42.6	41.1	53.0	55.4
Poultry, million tons	19.9	22.4	23.6	23.8	24.4
Fish and seafood, million tons	81.0	82.6	83.9	85.9	87.5*

Source: FAOSTAT, NBS, MARA
*Note. *estimated.*

2.4.2.2. Overview of milestones in the agro-industrial complex

1924 Domestic policy

The First Congress of the Kuomintang Party (“National Party”), during which a program for the modernization of China based on the “Three People’s Principles” was announced. One of the principles is national welfare prescribed to carry out land and tax reforms, improve infrastructure and living standards in rural areas, and increase the productivity of the agro-industrial complex.

1950 Domestic policy

The adoption of a law on land reform, within which the lands of former landowners were transferred into the ownership of peasants. It significantly improved the financial situation of the latter and led to the formation of a wide class of landowners in the country.

1953 Development plan

With the support of the USSR, China began implementing the first five-year economic development plan. It envisaged accelerated industrialization of the country. In the field of agriculture, it prioritized the creation of production cooperatives, and their number increased sharply during the five-year plan. At the same time, a state monopoly was introduced on trade in grain, cotton and vegetable oil, which marked China's transition to an administrative-command management system in the agro-industrial complex.

1958 Domestic policy

The second five-year plan for the country's economic development was adopted, aimed primarily at increasing industrial production, further collectivization in agriculture and stimulating scientific and technological progress. The implementation of the five-year plan was actually interrupted by the beginning of the Great Leap Forward, an ambitious attempt to accelerate building of communism. Poor governance, poor planning, the diversion of agricultural labor to metal production, the transformation of cooperatives into people's communes, the extermination of sparrows (followed by an infestation of insect pests), and unprecedented natural disasters led to a significant reduction in food production and a nationwide famine.

1961 Industry development

The beginning of the adjustment period. Against the backdrop of the emerging economic crisis, the Chinese leadership focused on restoring agriculture and ensuring the supply of essential goods to the population. To this end, they reduced the scale of major construction and the volume of industrial production, and tens of millions of workers were sent from cities to villages. The adjustment policy also involved restructuring the people's communes and prioritizing support for more efficient production teams. Citizens got back their garden plots and personal property and were allowed to keep livestock and engage in handicrafts and trade. The principle of material interest was partially restored in agro-industrial enterprises, and specialization began to take shape. During this period, the government practically allowed to divide communes into cooperatives and individual farms.

1966 Development plan

The beginning of the implementation of China's third five-year economic development plan, the main goal of which is the restoration of the country's agriculture. The key objectives of the plan included improving the quality and expanding the range of agro-industrial production, solving problems of providing the population with essential goods, modernizing the relevant infrastructure, and achieving self-sufficiency in basic food products to strengthen national security. Most of the five-year plan targets were achieved, but further development of agriculture was restrained by the objective limitations of the planned economy.

1973 Industry development

Chinese scientist Yuan Longping was the first in the world to breed a high-yielding variety of hybrid rice, one of the main agricultural crops in the country and the world. The results of this scientific discovery allowed China to significantly increase rice production and subsequently almost completely solve the problem of food security. Today, such hybrid rice is grown all over the world, and up to half of all rice fields are sown with it in China. Its yield significantly exceeds other varieties.

1978 Domestic policy

The beginning of the implementation of the “policy of reform and opening up”, a program of structural transformations that involved China’s transition to an export-oriented model of economic development. The program included reducing the role of the state in the national economy, deregulating foreign and domestic trade, as well as actively attracting foreign direct investment, primarily capital from huaqiao (Chinese diasporas in other countries). A system of family contracts replaced communes and brigades in agriculture. In fact, those were peasant (farm) households with state ownership of the land. The reforms ensured rapid growth of the economy and living standards of the majority of the country's population, especially in the coastal eastern provinces.

1980 Industry development

Creation of the first special economic zones in the provinces of Guangdong (the cities of Shenzhen, Zhuhai and Shantou) and Fujian (Xiamen) in the southeastern part of China. Thanks to an advantageous geographical location, as well as tax incentives, a simplified procedure for registering companies, exemption from import duties and other government support measures, in a relatively short period such zones became centers of attraction for foreign investment, the development of modern technologies and the concentration of export-oriented production.

1986 Development plan

The seventh five-year economic development plan for the country was adopted, which included an increase in the gross national product by an average of 6.7% per year, incl. by 4% in agriculture. The main goals of the plan included the reorganization of state-owned enterprises and their adaptation to market conditions, support for free trade, reduction of administrative control over the economy and more active use of levers of indirect influence on the macroeconomic situation (primarily taxes and interest rates).

1990 New institutions

China's first commodity exchange Zhengzhou Commodity Exchange (ZCE) is created in Zhengzhou, Henan Province. It specialized in trading futures contracts on chemical and agricultural products (including sugar, wheat, rice, apples, rapeseed, rapeseed oil and rapeseed meal).

1993 New institutions

Dalian Commodity Exchange (DCE) was founded in Dalian, Liaoning Province. The exchange specializes in trading futures contracts on industrial and agricultural commodities (including corn, corn starch, soybeans, soybean oil, soybean meal, edible eggs and live pigs).

2006 Domestic policy

Abolition of the flat agricultural tax, the amount of which in China was calculated depending on the area of land cultivated by the farmer and the number of family members (regardless of farm income or soil productivity). The adoption of this measure led to a noticeable increase in the standard of living in rural areas. The central government compensated for local budget deficits that arose due to the abolition of the tax through subsidies.

2011 Development plan

China's twelfth five-year economic development plan was adopted. The document for the first time announced the reorientation of the government from investment in export-oriented production to stimulating domestic consumption, as well as from the development of large coastal cities to the revival of rural areas and small towns in the central and western regions of the country. The plan also provided for the development of the successes of the previous five-year plans, attracting foreign investment in modern sectors of the agro-industrial complex and strengthening environmental protection.

2016 Industry development

The Chinese government abolished the minimum purchase price for corn and announced a transition to market pricing in the market for this type of product due to its excess stocks. As a result, the price of corn in the country fell sharply, its production, which previously depended on government support, decreased noticeably and import volumes increased significantly (in 2021, China took first place in the world in corn purchases). At the same time, measures to support domestic production of rice and wheat were preserved. Among the main reasons for the Chinese government's refusal to encourage corn cultivation are insufficient profitability and low drought tolerance.

2020 Foreign policy

The signing of an agreement on the first phase of a trade deal between the United States and China marked the beginning of the restoration of US-Chinese economic relations after a long “trade war”. The conclusion of the agreement contributed to a significant increase in the export of food and other agricultural products from the United States to China (almost 2 times in 2020) due to the elimination of a number of non-tariff barriers by China, including for the supply of meat and dairy products, seafood, rice, baby food, vegetables and fruits, feed for farm and pet animals, as well as advanced technologies in the field of agro-industrial complex. In the same year, China for the first time came out on top in the world in terms of agricultural imports, ahead of the United States and the EU amid the onset of the full-scale COVID-19 pandemic.

2022 Foreign policy

Entry into force of the agreement on the Regional Comprehensive Economic Partnership, within the framework of which a free trade zone was created between the member states of the Association of Southeast Asian Nations (Brunei, Vietnam, Indonesia, Cambodia, Laos, Malaysia, Myanmar, Singapore, Thailand, the Philippines), Australia, China, New Zealand, the Republic of Korea and Japan.

2022 Domestic policy

Adoption of a law on the protection of black soils, the stated goals of which are to preserve and increase soil fertility in China, protect the environment and strengthen the country's food security. Chinese black soils are concentrated mainly in the northeastern regions and, in accordance with the law, are protected by the state.

2022 Industry development

The world's first 26-story pork farm, built by Zhongxin Kaiwei Modern Farming, opened in Ezhou, Hubei Province. In total, the company's production site includes two such complexes with a total area of 800 thousand m^2, equipped with 12 elevators for transporting animals, 30 thousand automatic pig feeding systems and is designed for the slaughter of 1.2 million heads of livestock (more than 100 thousand tons of pork) annually. The farm also has a system for processing production waste into biogas for partial self-sufficiency of the complex with electricity. The project cost was 4 billion yuan. The company initiating the project previously specialized in the production of cement, but decided to invest in agriculture against the backdrop of the crisis in the Chinese construction industry and amid a decline in the number of pigs due to a regional outbreak of African swine fever in 2018–2020.

2023 Foreign policy

Based on the results of a risk assessment and analysis of the Russian system of state control of African swine fever, the General Administration of Customs of China allowed the supply of pork from Russia, lifting the restrictions in force since 2008. This marked the beginning of the process of domestic pork producers entering the largest market for this type of product. In addition, Russia and China signed an addition to the protocol on phytosanitary requirements for corn, rice, soybeans and rapeseed, according to which the export of corn and rice from all regions of Russia is allowed to China (previously, supplies were allowed only from five Far Eastern regions).

2024 Industry development

The Ministry of Agriculture and Rural Affairs of the People's Republic of China has expanded the list of varieties of genetically modified soybeans, corn and cotton permitted for production and import. In particular, the sale and cultivation of herbicide-resistant soybean varieties DBN8002 and corn DP202216 have been approved throughout the country. Supporting developments in the field of GMOs is part of the Chinese government's strategy to ensure the state's food security and reduce dependence on imported field crops.

2024 Development plan

Publication of the government program for rural development for 2024. The main goals are strengthening food security, ensuring stable incomes for rural residents, developing the processing sector, modernizing infrastructure and improving local governance. The document sets a target for grain production of at least 650 million tons by the end of the year, special attention is also paid to supporting the production of soybeans, rapeseed, camellia oil, wild plants, raw milk, live pigs, cattle meat and lamb.

2024 Foreign policy

For the first time, companies from Argentina, which had not previously supplied these products to the Chinese market, received permission to export wheat to China. The decision comes in the context of Beijing's efforts to diversify its imports of agricultural goods (currently, more than half of all imported wheat comes from Australia).

2.4.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

Today China is known, first of all, as a state with a developed industry, producing and exporting almost all types of goods, including high-tech. At the same time the country remains one of the world's largest net importers of agricultural products (grains, meat, etc.). Imported products are in high demand in the country, including due to various problems related to food safety.

China is a country with a high level of self-sufficiency in vegetables and fruits, processed fish and seafood products (fresh and canned fish and shellfish, fish fillets), meat and grains. However, to produce these goods, the country imports significant volumes of low-value products.

Increasing China's food security directly depends on increasing the productivity of agricultural land, expanding arable land and restoring it, introducing modern technological solutions in the field of seed production, irrigation, fertilizer application and other measures enshrined in national strategic documents. China's latest five-year plan for 2023-2028 stipulates the adoption of at least 10 laws of the PRC in the field of food security.

Development of high-tech production and deep processing

China officially included the development of technologies for the production of alternative proteins in the 14th five-year plan. The country's food industry has the largest capacity for processing legumes and producing high-tech vegetable proteins and starches from peas, soybeans and other crops.

In many large cities in China large-scale projects are being implemented to build robotic vertical farms for growing vegetables, herbs and mushrooms. Experiments are being conducted on growing tubers and fruit trees. Indoor farms can grow produce regardless of the surrounding terrain, making them ideal for urban areas, vacant lots and deserts. In addition, the growing process is faster, allowing for more harvests per year. Such a farm could act as a breeding accelerator, reducing the growing time for wheat, cotton and soybeans by at least 50 percent.

Sustainable development of agriculture

At the beginning of 2020 the Chinese government published the Digital Development Plan for Agriculture and Rural Areas for 2019–2025, which involves the introduction of digital technologies to improve the data collection system, monitor the dynamics of supply and demand in the market, and improve the level of education of agricultural workers. Electronic platforms for trading agricultural commodities established in China in recent years have allowed local producers to maintain customer connections and expand their presence in foreign markets, even despite the consequences of disrupted supply chains during the COVID-19 pandemic. Digitalization of agriculture and the economy as a whole (including through the active development of 5G networks) is one of the priority areas of the Chinese government as part of efforts to increase the competitiveness of Chinese products in the global market.

Minimizing production and consumption waste

China is making a concerted effort to tackle the food waste problem through a series of reforms through government campaigns. In August 2020 Chinese President Xi Jinping launched the Clean Your Plate 2.0 campaign, modeled on an earlier anti-corruption initiative of the same name. Following the Clean Your Plate 2.0 campaign, China passed the Anti-Food Waste Law in April 2021. This State Council initiative includes educational campaigns, business regulatory measures, systems to improve purchasing, storage and processing practices, and methods to improve food production efficiency with associated incentives and penalties.

Consumption of healthy, functional and organic products

As China's disposable incomes rise and people become more familiar with other cultures, demand for safer, more diverse and higher-quality food is growing. The traditional Chinese diet is based on grains (wheat, rice) with a high content of vegetables and a low content of animal products in the diet. However, along with income growth, consumption of meat products, vegetable oils and sugar has also increased. In urban markets consumers are increasingly looking for special food products such as organic foods, dairy alternatives and imported meat. China's growing middle class is expected to make up more than half the population by 2025 and the demand for meat products from wealthier populations will rise steadily, matching growing demand for soybeans, grains and other farm animal feeds.

More and more Chinese people are striving to follow a healthy lifestyle, which means eating healthy and balanced meals rich in nutritious ingredients. Food products with the “Eco” and “Organic” labels, as well as sugar-free and gluten-free products, are gaining popularity. Plant-based dairy and meat alternatives, both imported and locally produced, are also in high demand.

E-commerce development

Offline stores in China have undergone significant changes in recent years. Even before the start of the pandemic, consumers began to increasingly opt for online shopping, but the most active development of e-commerce occurred in 2020–2022. With the introduction of strict quarantine restrictions, services for the delivery of food and other goods became even more in demand and the general the number of online shoppers exceeded 842 million people. Many retail stores began to cooperate with home delivery services or hired their own staff of couriers, while developing mobile applications for online orders.

At the end of 2023 the number of Internet users in China reached about 1.1 billion people. The e-commerce segment in China is one of the most highly competitive, which forces delivery companies to constantly improve the services they provide, since the client often chooses the store with the fastest delivery rather than the store with a larger assortment.

The development of cold chain logistics allows online platforms to offer and deliver chilled and frozen products. This has led to increased demand for the services of e-commerce companies in medium and small cities, forcing retailers to optimize logistics and supply chains.

Social networks in China are currently also one of the most efficient marketing tools for promoting products sold primarily online. During the COVID-19 pandemic many well-known brands conducted online broadcasts, inviting famous influencers to promote their products. Such broadcasts and other advertising on social networks continue to attract an audience of millions, which has a positive effect on online sales.

Development of the “Blue Economy” — fish and seafood

China is the leader in aquaculture production, which accounts for more than 80% of the country's total fish and seafood production. According to the fisheries development plan for the 14th five-year plan, by 2025 aquaculture production will increase to 69 million tons, the coastal catch limit will remain at 10 million tons per year and the number of large and medium-sized fishing vessels will be reduced.

In April 2023 the President Xi Jinping proposed the term Blue Granary to describe marine fisheries and aquaculture, particularly deep-sea fisheries and aquaculture. Soon after, Chinese authorities released guidelines on deep-sea aquaculture as a key element in strengthening the agricultural supply chain.

In order to protect biodiversity in the country's longest waterway, the Yangtze River basin, productive fishing will be completely banned from 2021 for 10 years. As of the beginning of 2024 the fish population in the river basin has increased by a quarter, but the volume of aquatic fauna in it is still three times lower than before the start of industrialization of the country in the 1950s.

2.4.2.4. Key agricultural producers

The largest agricultural holdings in China[6]

COFCO Corporation

Activities	Production, processing, distribution, import, export, retail
Industry	Meat, dairy, grain, oil and fat, ready-to-eat products, beverages
Description	Founded in 1949, COFCO Corporation is the leader in China's agricultural industry and one of the world's leading agribusinesses with a global presence. The company is the largest food and beverage manufacturer in China, covering grain, dairy, meat, oil and fat industries. The company also operates in the retail, financial and real estate sectors. COFCO Corporation is the largest importer and exporter of soybeans, wheat, corn, sugar and other agricultural products. As an investment holding company, COFCO Corporation owns 15 listed companies, 8 of which are listed in Hong Kong. In 2022 COFCO Corporation's total assets were 695.6 billion yuan (96 billion US dollars). The company ranks 29th in the Fortune China 500 rating, with annual revenue of 110.2 billion US dollars as of March 31, 2023
Contact Information	**Address:** COFCO Fortune Plaza, No.8, Chao Yang Men South St., Chao Yang District, Beijing **Tel.:** +86 10 8500 6688 **E-mail:** cofco-news@cofco.com **Website:** www.cofco.com

China Resources Group

Activities	Production, distribution, import, export, retail
Industry	Ready-to-eat products, alcoholic and non-alcoholic beverages
Description	A diversified holding company founded in 1938, based in Shenzhen and Hong Kong with major assets in mainland China. Main areas of interest China Resources Group are: retail trade, logistics, residential, commercial and office real estate, production of cement, concrete, pharmaceuticals, ethanol, microelectronics, textiles, beer, soft drinks and food, electric power, natural gas supplies, financial and medical services. The company operates more than 20 subsidiaries with total assets of more than 275 billion US dollars and a total number of employees of 370 thousand. The company ranks 24th in Fortune China 500 rating, with annual revenue of 121.6 billion US dollars as of March 31, 2023
Contact Information	**Address in Hong Kong:** 49/F., China Resources Building, 26 Harbour Road, Wanchai, Hong Kong **Tel.:** +852 2879 7888 **Address in Shenzhen:** China Resources Tower No. 2666, Keyuan South Road, Nanshan District, China **Tel.:** +86 755 8266 8888 **Website:** www.en.crc.com.cn/

[6] According to the Fortune China 500 rating: https://clck.ru/3B2Fhf

New Hope Group

Activities	Production, processing, distribution, import, export
Industry	Meat, dairy, feed, ready-to-eat products
Description	One of the largest agro-industrial corporations in China and the world, founded in 1982. The company specializes in meat and dairy farming, production of animal feed, dairy and meat products, seafood, and chemical fertilizers. New Hope Group is also a major shareholder of China Minsheng Banking Corporation and Minsheng Insurance Company Life Insurance, covering real estate, finance, transport and logistics sectors. The company operates more than 600 subsidiaries around the world, employs more than 135 thousand people, and has total assets exceeding 41.5 billion US dollars. The company ranks 100th in the Fortune China 500 rating, with annual revenue of 41.4 billion US dollars as of March 31, 2023
Contact Information	**Address:** Floor 11, Block B, Tower 3, Wangjing SOHO,1 East Futong Avenue, Chaoyang District, Beijing **Tel.:** +86 10 5329 9800 **E-mail:** contact@newhope.cn **Website:** www.newhopegroup.com

Wanzhou International (WH Group)

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	The Chinese company, which is the world's largest pork producer, holds leading positions in China, the USA and the EU. The company is a full-cycle enterprise. The company's current business is mainly divided into three main sectors: pork production, fresh pork production and pork products (prepared foods and sausages). Among them, the production of meat products is the company's main business, accounting for about 50% of its annual revenue and more than 90% of its operating profit. The company ranks 147th in the Fortune China 500 rating, with annual revenue of 28.1 billion US dollars as of March 31, 2023
Contact Information	**Address:** RM 7602B-7604A, International Commerce Centre, 1 Austin Road, Kowloon, Hong Kong **Tel.:** +852 2868 2828 **E-mail:** investor@wh-group.com **Website:** www.wh-group.com

Muyuan Foods Co.

Activities	Production, processing, distribution, import
Industry	Meat, feed
Description	The company, founded in 1992, is one of China's largest pig breeding and pork production enterprises. Muyuan Foods is a full-service production facility, from pig farming to feed and veterinary drug production, that operates the world's largest multi-story pig farm, housing 2.1 million pigs. The company operates more than 308 subsidiaries. In 2023 the company sold a total of 63.82 million pigs and slaughtered 13.26 million pigs. The company ranks 183rd in the Fortune China 500 rating, with annual revenue of 18.5 billion US dollars as of March 31, 2023
Contact Information	**Address:** Longsheng Industrial Park Wolong District Nanyang, China **Tel.:** +86 400 999 7888; +86 400 065 8989 **E-mail:** sjb@muyuanfoods.com **Website:** www.muyuanfoods.com

Inner Mongolia Yili Industrial Group

Activities	Production, processing, distribution, import, export
Industry	Dairy
Description	The company, founded in 1993, is headquartered in Hohhot, and is listed on the Shanghai Stock Exchange. Inner Mongolia Yili Industrial Group is one of the world's top five dairy producers and has been the leader in Asia for ten years in a row. Inner Mongolia Yili Industrial Group is also the largest dairy producer in China, selling a wide range of products. The company employs more than 60 thousand employees. The company ranks 186th in the Fortune China 500 rating, with annual revenue of 18.3 billion US dollars as of March 31, 2023
Contact Information	**Address:** 1 Jinshan Avenue Jinshan Development Zone Hohhot, Inner Mongolia **Tel.:** +86 400 816 9999 **Website:** www.yili.com/en/

Guangdong HAID Group Co.

Activities	Production, processing, distribution, import, export
Industry	Meat, fish, feed, ready-to-eat products
Description	Chinese agricultural and food corporation specializing in the field of animal feed, livestock and poultry breeding, fish, crab and shrimp breeding, meat processing industry, and production of animal vaccines. The company also provides comprehensive technical solutions for farmers. With the rapid development of more than two decades, Guangdong HAID Group Co. has opened 600 subsidiaries in mainland China and overseas. It also owns one research center, more than 10 piloting facilities, the company employs more than 40 thousand employees. The company ranks 201st in the Fortune China 500 rating, with annual revenue of 15.5 billion US dollars as of March 31, 2023
Contact Information	**Address:** 7th Floor, Block 2, Haida Building, No. 42, Wanbo Fourth Road, Nancun Town, Panyu District, Guangzhou **Tel.:** +86 203 938 8960 **Website:** www.haid.com.cn

Beijing Capital Agribusiness and Foods Group (Beijing Shounong Food Group)

Activities	Production, processing, distribution, import, export, retail
Industry	Meat, grain, oil and fat, dairy, ready-to-eat products
Description	One of the largest agro-industrial group of companies in China, founded in 2017 as a result of the merger of 3 large agro-industrial and financial companies, which is also known as Beijing Shounong Food Group. The group of companies specializes in the production and sale of food products, agriculture, retail trade, logistics and distribution, as well as deep processing of agricultural products. The company ranks among the top 100 agricultural industrialization enterprises in China and among the top 200 companies in the Fortune China 500 with annual revenue of over 22 billion US dollars
Contact Information	**Address:** Beijing Shounong Food Group Co., Ltd., No. 28 Shuguang West Road, Chaoyang District, Beijing **Website:** www.bjcag.com

Wen's Food Group Co.

Activities	Production, processing, distribution, import, retail
Industry	Meat, dairy, ready-to-eat products
Description	The group of companies was founded in 1983 and now it is one of of the largest agricultural holdings in China, the main activities of which are livestock and poultry farming, processing and production of food products from meat and poultry, retail trade and distribution network management, production of feed additives and veterinary drugs, financial investments. Wen's Food Group Co. is currently a leading national innovative enterprise in the field of industrialization of agriculture, with a total workforce of almost 50 thousand people. The company ranks 223rd in the Fortune China 500 rating, with annual revenue of 12.4 billion US dollars as of March 31, 2023
Contact Information	**Address:** No. 9, Dundee North Road, Jincheng City, Xinxing County, Yunfu City, Guangdong Province **Tel.:** +86 758 398 8098 **E-mail:** gdwsjt@163.com **Website:** https://www.wens.com.cn/

China Mengniu Dairy Company Limited

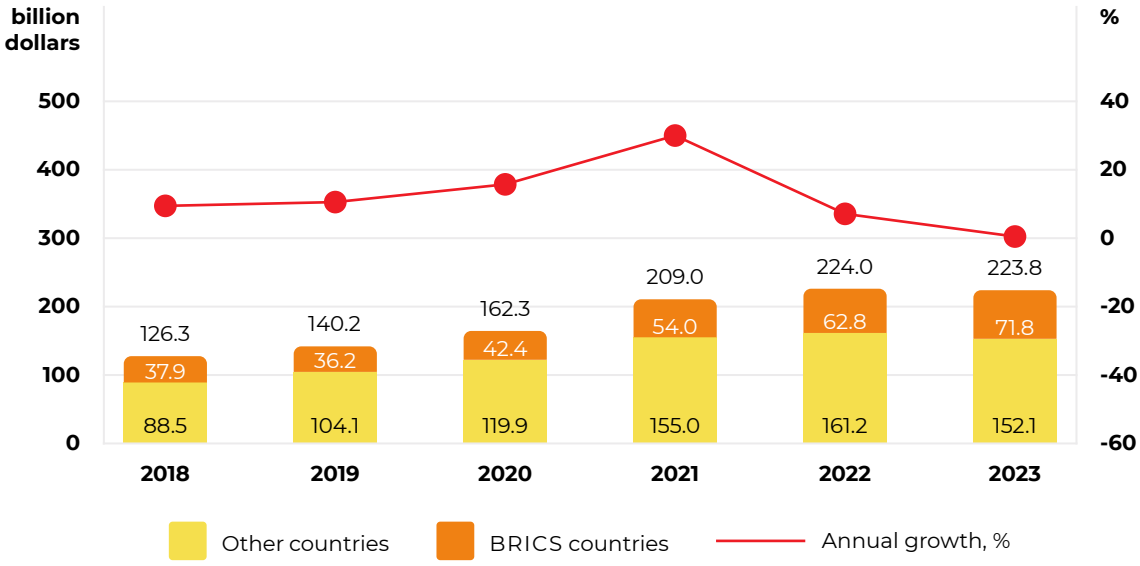
Activities	Production, processing, distribution, import, export, retail
Industry	Dairy
Description	A food processing company that is the second largest dairy producer in China after Inner Mongolia Yili Industrial Group. China Mengniu Dairy Company Limited was founded in 1999 and has its headquarters in Hong Kong and Hohhot. The company operates 41 production facilities across China and holds market leadership positions in the premium pure milk, refrigerated yogurt, premium fresh milk and cheese segments. The company ranks 7th in the Global list Dairy Top 10, 26th place in the Top 100 Most ranking Valuable Chinese Brands and 214th place in Fortune China 500 rating, with annual revenue of 12.4 billion US dollars as of March 31, 2023
Contact Information	**Address:** Room 311, Milk Source Building, Mengniu Dairy, Shengle Economic Park, Helinghe, Hohhot City, Inner Mongolia **Tel.:** +86 400 660 3333 **E-mail:** mnkf@mengniu.cn **Website:** https://www.mengniu.com.cn/

2.4.3. Foreign trade in agricultural products

2.4.3.1. Import of agricultural products

In 2023 import of Chinese agricultural products amounted to 223.8 billion US dollars, which is 0.1% (-194.6 million US dollars) below the level of 2022. In 2023 import from the BRICS countries increased by 14.2 % (+8.9 billion US dollars) compared to the previous year, while import from other countries decreased by 5.7% (-9.1 billion US dollars). Import volumes of agricultural products in 2018–2023 increased by an average of 12.1% per year.

Import of agricultural products of China, 2018-2023, billion US dollars



Source: ITC Trade Map

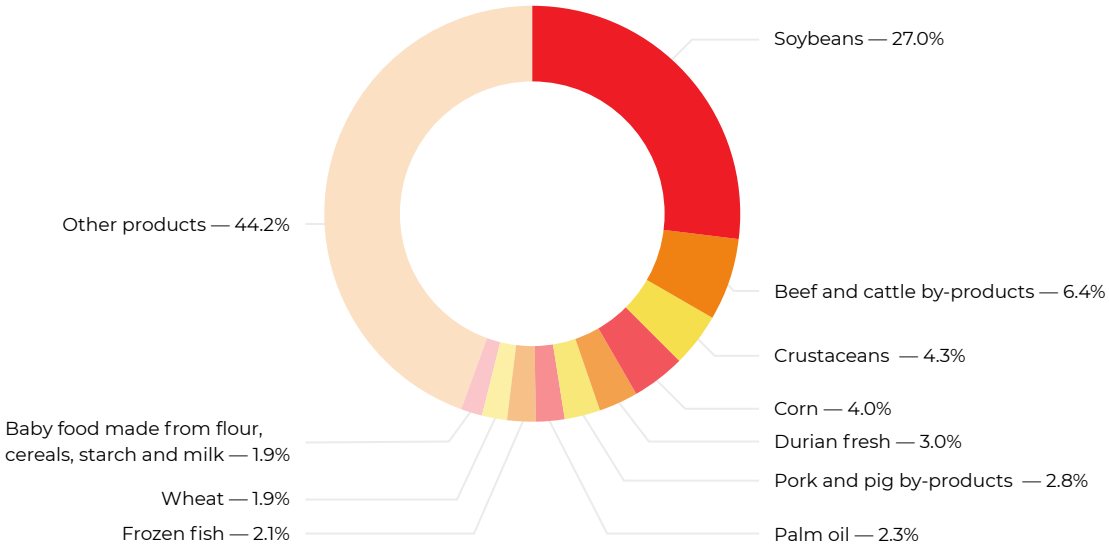
At the end of 2023 the structure of China's import was dominated by soybeans (27.0% of import value). The top 5 imported agro-industrial products also included beef and cattle by-products (6.4%), crustaceans (4.3%), corn (4.0%) and fresh durian (3.0%). In total the top 10 commodity items accounted for 55.8% of imported Chinese agro-industrial products in value terms.

Import structure of Chinese agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	38,078.0	35,342.0	39,545.6	53,528.2	61,236.0	60,462.8	-773.2	-1.3
2	Beef and cattle by-products	4,888.7	8,332.1	10,272.9	12,634.9	18,001.7	14,414.3	-3,587.4	-19.9
3	Crustaceans	4,374.5	7,037.2	5,911.8	6,974.1	9,565.8	9,567.3	1.5	0.02
4	Corn	787.2	1,061.1	2,481.1	8,022.7	7,103.7	9,019.7	1,916.0	27.0
5	Durian fresh	1,095.1	1,604.5	2,305.0	4,205.4	4,034.9	6,707.3	2,672.4	66.2
6	Pork and pork by-products	3,605.1	6,541.8	14,683.8	13,007.1	6,589.6	6,275.8	-313.8	-4.8
7	Palm oil	3,394.9	4,108.8	4,123.8	5,946.1	5,842.2	5,099.6	-742.6	-12.7
8	Frozen fish	4,554.9	4,934.8	3,918.6	3,508.4	5,102.4	4,798.3	-304.1	-6.0
9	Wheat	780.9	901.0	2,261.7	3,038.7	3,779.7	4,305.3	525.6	13.9
10	Baby food made from flour, cereals, starch and milk	4,888.5	5,330.7	5,218.0	4,453.2	4,544.3	4,294.8	-249.4	-5.5
	Other products	59,894.6	65,055.7	71,579.8	93,715.2	98,231.9	98,892.2	660.4	0.7
	Total	**126,342.2**	**140,249.8**	**162,302.0**	**209,034.0**	**224,032.1**	**223,837.5**	**-194.6**	**-0.1**

Source: ITC Trade Map

Import structure of Chinese agricultural products in value terms, 2023, %



Source: ITC Trade Map

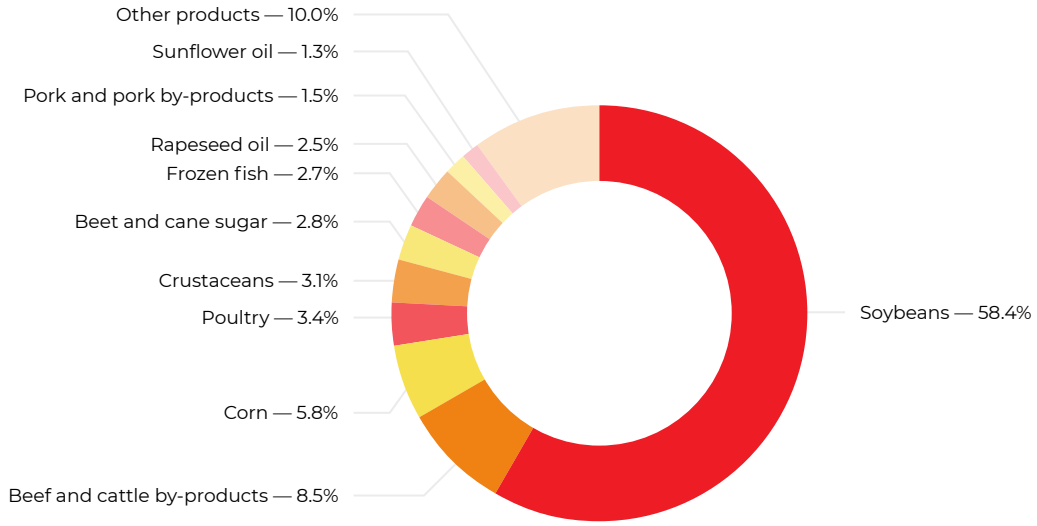
At the end of 2023 the structure of China's import from the BRICS countries was dominated by soybeans (58.4% of import value). The top 5 imported agricultural products also included beef and cattle by-products (8.5%), corn (5.8%), poultry (3.4%) and crustaceans (3.1%). In total the top 10 commodity items accounted for 90.0% of Chinese import of agricultural products from the BRICS countries in value terms.

Import structure of Chinese agricultural products from the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	29,108.4	23,236.8	25,158.5	33,375.0	37,712.1	41,882.1	4,170.0	11.1
2	Beef and cattle by-products	1,548.9	2,115.7	4,255.1	4,800.7	7,691.8	6,090.3	-1,601.4	-20.8
3	Corn	5.4	11.9	22.4	22.3	30.1	4,190.7	4,160.5	—
4	Poultry	931.3	1,415.5	1,966.2	1,723.2	1,923.1	2,413.1	490.0	25.5
5	Crustaceans	624.0	1,551.7	1,172.8	1,681.1	2,068.5	2,207.5	139.0	6.7
6	Beet and cane sugar	292.1	491.1	1,392.4	1,966.2	2,127.9	2,019.2	-108.7	-5.1
7	Frozen fish	1,868.7	1,992.3	1,522.3	1,187.3	2,089.7	1,963.9	-125.8	-6.0
8	Rapeseed oil	67.7	289.3	503.1	780.4	1,119.8	1,819.0	699.2	62.4
9	Pork and pork by-products	317.3	607.6	1,597.6	1,720.9	1,074.2	1,077.6	3.4	0.3
10	Sunflower oil	174.6	238.6	575.5	380.8	334.9	921.6	586.7	2.8 times
	Other products	2,935.0	4,203.5	4,279.7	6,356.6	6,676.0	7,180.5	504.6	7.6
	Total	**37,873.5**	**36,154.0**	**42,445.5**	**53,994.5**	**62,848.2**	**71,765.5**	**8,917.4**	**14.2**

Source: ITC Trade Map

Import structure of Chinese agricultural products from the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

At the end of 2023 the structure of China's import from other countries was dominated by soybeans (12.2% of import value). The top 5 imported agricultural products also included beef and cattle by-products (5.5%), crustaceans (4.8%), fresh durian (4.4%) and pork and pig by-products (3.4%). In total, the top 10 commodity items accounted for 44.9% of import of Chinese agricultural products from other countries in value terms.

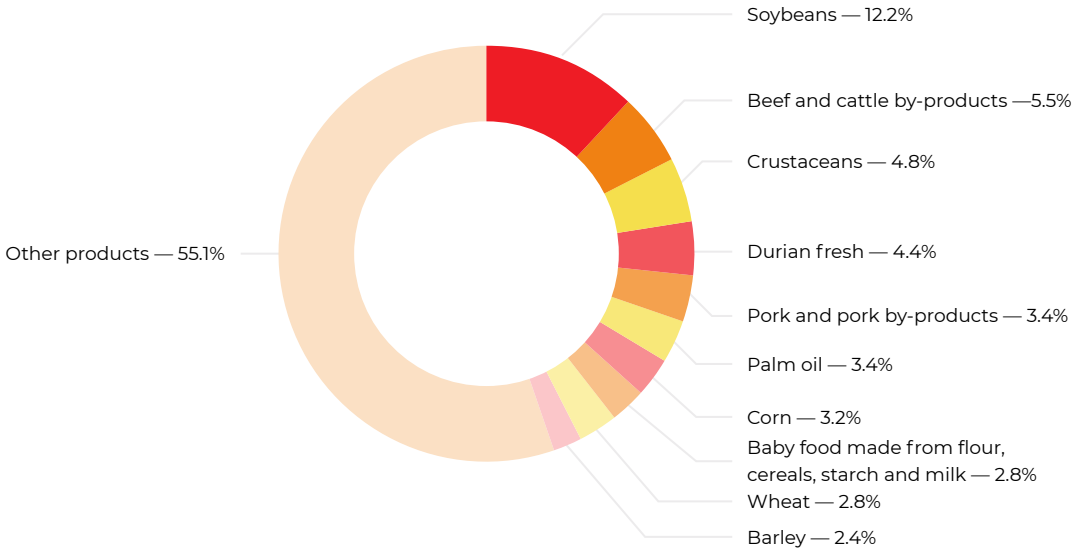
Import structure of Chinese agricultural products from other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Soybeans	8,969.6	12,105.2	14,387.0	20,153.2	23,523.9	18,580.7	-4,943.2	-21.0
2	Beef and cattle by-products	3,339.8	6,216.4	6,017.8	7,834.2	10,310.0	8,324.0	-1,985.9	-19.3
3	Crustaceans	3,750.5	5,485.5	4,739.0	5,293.0	7,497.2	7,359.7	-137.5	-1.8
4	Durian fresh	1,095.1	1,604.5	2,305.0	4,205.4	4,034.9	6,707.3	2,672.4	66.2
5	Pork and pig by-products	3,287.7	5,934.2	13,086.2	11,286.2	5,515.3	5,198.2	-317.2	-5.8
6	Palm oil	3,394.9	4,108.8	4,123.8	5,946.1	5,842.2	5,099.6	-742.6	-12.7
7	Corn	781.7	1,049.2	2,458.7	8,000.3	7,073.6	4,829.0	-2,244.5	-31.7
8	Baby food made from flour, cereals, starch and milk	4,887.3	5,330.6	5,217.7	4,453.2	4,544.3	4,294.8	-249.4	-5.5

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
9	Wheat	764.8	892.0	2,249.5	3,024.4	3,777.0	4,270.6	493.6	13.1
10	Barley	1,690.4	1,561.4	1,879.1	3,537.0	2,034.1	3,660.2	1,626.0	79.9
	Other products	56,507.0	59,807.9	63,392.7	81,306.5	87,031.4	83,747.8	-3,283.7	-3.8
	Total	**88,468.8**	**104,095.8**	**119,856.5**	**155,039.4**	**161,183.9**	**152,071.9**	**-9,112.0**	**-5.7**

Source: ITC Trade Map

Import structure of Chinese agricultural products from other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest exporters of agricultural products to China were Brazil (25.7% of import in value terms), Russia (3.9%) and India (1.5%). In total the BRICS countries accounted for 32.1% of import of Chinese agricultural products.

In addition, among the main exporters of agricultural products to China in 2023 were the USA (13.9%) and Thailand (5.8%). In total the top 10 countries accounted for 72.3% of Chinese agricultural import in value terms.

The main countries exporting agricultural products to China in value terms, 2018–2023, million US dollars

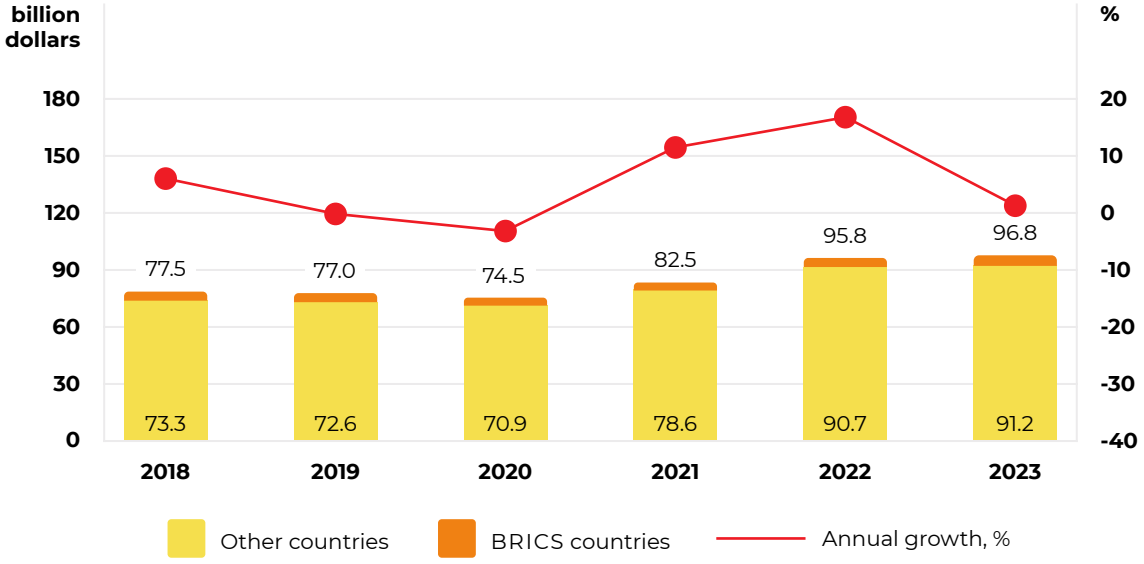
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Brazil	32,647.4	28,542.4	34,213.7	44,049.4	50,884.3	57,423.5	6,539.2	12.9
2	Russia	3,198.4	3,584.2	4,074.2	4,276.8	6,095.8	8,781.9	2,686.1	44.1
3	India	1,055.3	2,338.1	2,245.0	3,322.1	3,760.9	3,372.9	-388.0	-10.3
4	South Africa	538.0	537.5	528.2	605.1	692.8	792.7	99.9	14.4
5	UAE	31.4	214.1	474.2	641.8	505.0	539.5	34.6	6.8
6	Ethiopia	256.9	277.5	312.9	333.0	381.5	362.7	-18.9	-4.9
7	Iran	47.3	308.1	421.1	475.5	232.0	217.5	-14.5	-6.3
8	Egypt	95.9	167.8	136.7	219.6	179.4	174.9	-4.5	-2.5
9	Saudi Arabia	2.8	184.5	39.5	71.2	116.4	99.9	-16.5	-14.2
	Total BRICS	**37,873.5**	**36,154.0**	**42,445.5**	**53,994.5**	**62,848.2**	**71,765.5**	**8,917.4**	**14.2**
1	USA	14,208.4	12,688.0	21,443.0	36,561.6	38,162.0	31,010.4	-7,151.6	-18.7
2	Thailand	5,562.3	6,785.6	7,628.1	11,640.2	12,347.2	12,925.3	578.1	4.7
3	Canada	7,712.3	7,062.0	7,139.5	8,619.2	7,486.5	10,152.5	2,666.0	35.6
4	Australia	6,830.6	8,204.5	7,772.2	7,082.9	9,179.2	9,867.5	688.4	7.5
5	Indonesia	5,143.4	5,825.4	5,792.6	9,369.5	10,348.5	9,744.9	-603.6	-5.8
6	New Zealand	6,685.8	8,479.4	8,576.7	10,790.4	11,236.8	9,464.7	-1,772.0	-15.8
7	Vietnam	3,196.4	3,235.6	3,932.6	3,947.1	5,931.2	6,650.7	719.5	12.1
8	France	3,780.1	3,893.6	4,600.9	6,343.8	4,901.5	5,714.8	813.3	16.6
9	Argentina	2,164.4	6,507.5	6,206.5	6,393.9	7,609.4	5,375.9	-2,233.5	-29.4
10	Chile	3,062.8	3,449.3	3,766.3	3,940.6	5,014.0	4,748.2	-265.8	-5.3
	Other countries	30,122.4	37,964.9	42,998.2	50,350.3	48,967.8	46,416.9	-2,550.8	-5.2
	Total non-BRICS	**88,468.8**	**104,095.8**	**119,856.5**	**155,039.4**	**161,183.9**	**152,071.9**	**-9,112.0**	**-5.7**
	Total	**126,342.2**	**140,249.8**	**162,302.0**	**209,034.0**	**224,032.1**	**223,837.5**	**-194.6**	**-0.1**

Source: ITC Trade Map

2.4.3.2. Export of agricultural products

Export of Chinese agricultural products in 2023 amounted to 96.8 billion US dollars, it is 1.1% (+1.1 billion US dollars) higher than in 2022. In 2023 export to the BRICS countries increased by 10.8% (+552.5 million US dollars), export to other countries increased by 0.6% (+507.5 million US dollars) in comparison with 2022. In 2018-2023 Chinese agricultural export was growing at an average annual rate of 4.5%.

Export of agricultural products of China, 2018–2023, billion US dollars



Source: ITC Trade Map

The main export products of China's agro-industrial complex in 2023 were fish products and canned fish (4.2%), vegetables cooked or canned without vinegar (4.0%), fish fillets and other fish meat (3.4%) and fresh bulb vegetables (3.2%). In total the top 10 exported products accounted for 30.1% of the value of Chinese agricultural export.

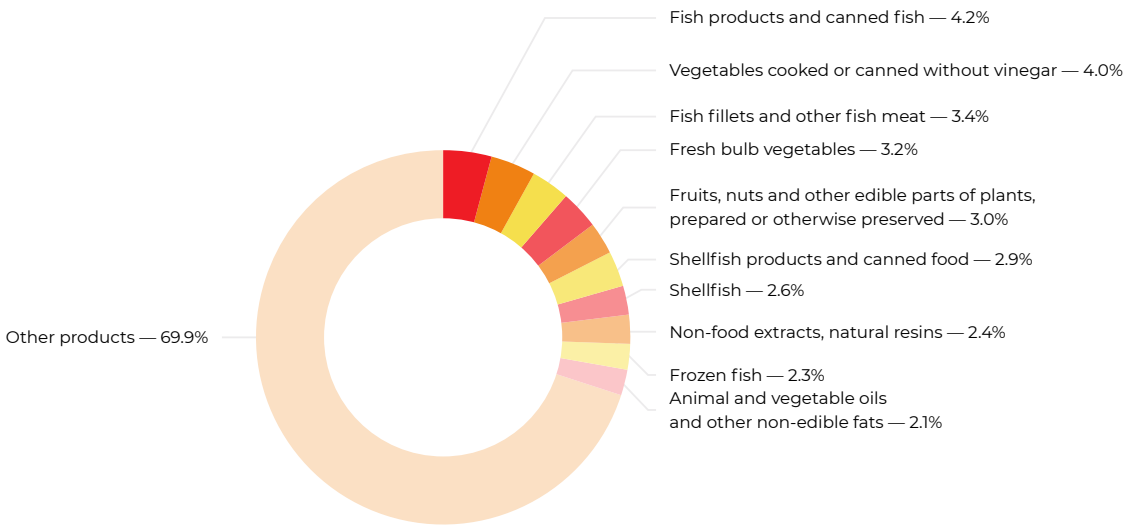
Export structure of Chinese agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Fish products and canned fish	3,586.4	3,678.3	4,074.7	4,991.3	4,506.7	4,072.0	-434.8	-9.6
2	Vegetables cooked or canned without vinegar	3,176.0	3,222.7	3,014.1	3,136.9	3,637.8	3,837.3	199.5	5.5
3	Fish fillets and other fish meat	4,472.7	4,291.3	3,345.2	3,162.7	4,077.8	3,322.9	-754.9	-18.5

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
4	Fresh bulb vegetables	1,977.3	2,644.3	2,620.9	2,539.2	2,404.2	3,074.4	670.2	27.9
5	Fruits, nuts and other edible parts of plants, prepared or otherwise preserved	2,917.1	2,609.5	2,521.0	2,712.8	2,943.7	2,864.8	-78.8	-2.7
6	Shellfish products and canned food	2,180.1	2,046.1	2,075.0	2,981.5	3,377.6	2,830.1	-547.5	-16.2
7	Shellfish	3,278.3	2,943.9	2,720.9	3,118.5	3,377.8	2,526.1	-851.7	-25.2
8	Non-food extracts, natural resins	1,528.7	1,556.0	1,636.4	2,113.8	2,766.3	2,320.1	-446.2	-16.1
9	Frozen fish	2,873.6	2,852.0	2,377.4	2,363.5	2,263.4	2,256.1	-7.3	-0.3
10	Animal and vegetable oils and other non-edible fats	394.8	521.1	751.9	1,304.9	2,207.8	2,005.6	-202.2	-9.2
	Other products	51,160.4	50,586.0	49,389.0	54,039.9	64,220.3	67,733.9	3,513.7	5.5
	Total	**77,545.4**	**76,951.2**	**74,526.5**	**82,464.8**	**95,783.4**	**96,843.3**	**1,059.9**	**1.1**

Source: ITC Trade Map

Export structure of Chinese agricultural products in value terms, 2023, %



Source: ITC Trade Map

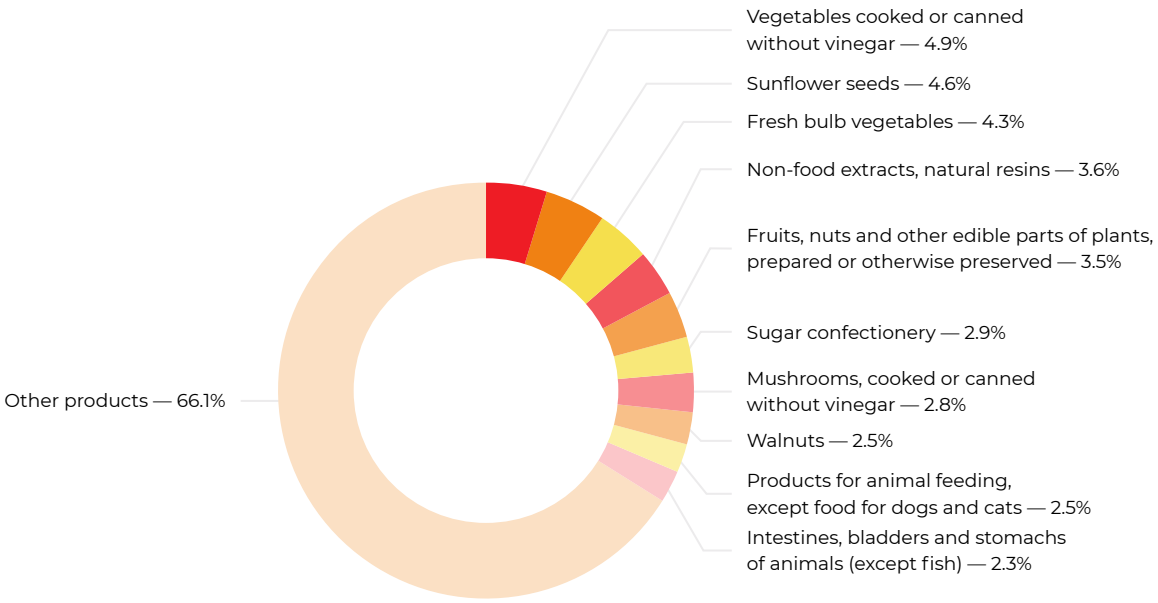
The main export products of China's agro-industrial complex to the BRICS countries in 2023 were vegetables cooked or canned without vinegar (4.9%), sunflower seeds (4.6%), fresh bulb vegetables (4.3%), as well as non-food extracts, natural resins (3.6%). In total the top 10 exported products accounted for 33.9% of the value of Chinese agricultural export.

Export structure of Chinese agricultural products to the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Vegetables cooked or canned without vinegar	167.4	218.9	195.0	145.8	226.2	278.1	51.9	23.0
2	Sunflower seeds	208.0	231.3	193.3	189.9	281.9	260.8	-21.1	-7.5
3	Fresh bulb vegetables	176.9	261.8	306.0	238.7	211.6	245.9	34.3	16.2
4	Non-food extracts, natural resins	130.8	136.1	135.6	174.2	236.1	205.3	-30.7	-13.0
5	Fruits, nuts and other edible parts of plants, prepared or otherwise preserved	184.0	163.3	149.9	173.7	182.5	198.5	16.1	8.8
6	Sugar confectionery	70.7	73.0	51.6	82.4	131.3	162.6	31.3	23.8
7	Mushrooms, cooked or canned without vinegar	85.9	109.7	105.8	165.3	194.5	160.1	-34.4	-17.7
8	Walnuts	6.6	28.9	41.3	102.6	126.6	142.2	15.7	12.4
9	Products for animal feeding, except food for dogs and cats	149.2	109.2	108.8	145.5	186.7	139.0	-47.7	-25.5
10	Intestines, bladders and stomachs of animals (except fish)	132.9	112.6	107.7	122.8	135.1	129.9	-5.2	-3.8
	Other products	2,973.7	2,885.9	2,207.1	2,338.8	3,201.9	3,744.2	542.3	16.9
	Total	**4,286.0**	**4,330.7**	**3,602.1**	**3,879.7**	**5,114.3**	**5,666.7**	**552.5**	**10.8**

Source: ITC Trade Map

Export structure of Chinese agricultural products to the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

The main export products of China's agro-industrial complex to other countries in 2023 were fish products and canned food (4.4%), vegetables cooked or canned without vinegar (3.9%), fish fillets and other fish meat (3.6%), as well as fresh bulb vegetables (3.1%). In total the top 10 exported types of products accounted for 30.5% of the value of Chinese agricultural export.

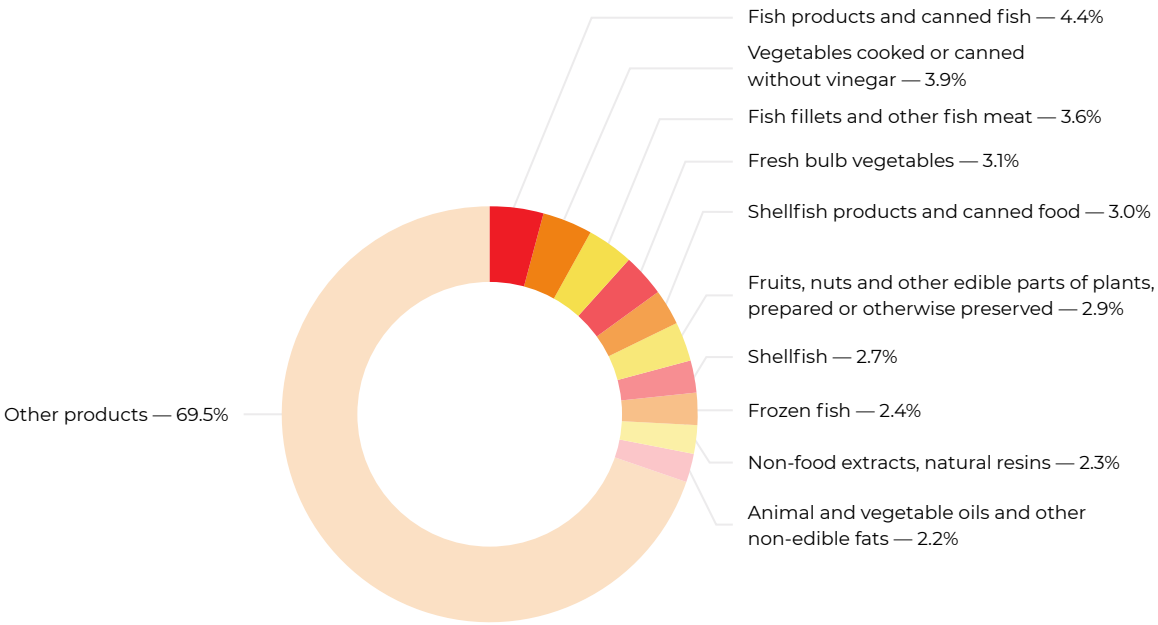
Export structure of Chinese agricultural products to other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Fish products and canned fish	3,406.7	3,533.2	3,951.7	4,876.3	4,384.9	3,967.0	-417.9	-9.5
2	Vegetables cooked or canned without vinegar	3,008.6	3,003.8	2,819.1	2,991.1	3,411.6	3,559.2	147.6	4.3
3	Fish fillets and other fish meat	4,341.1	4,185.6	3,281.1	3,083.0	4,011.8	3,262.4	-749.4	-18.7
4	Fresh bulb vegetables	1,800.4	2,382.5	2,314.9	2,300.5	2,192.7	2,828.5	635.9	29.0
5	Shellfish products and canned food	2,097.7	1,987.9	2,032.1	2,924.6	3,322.9	2,773.8	-549.1	-16.5
6	Fruits, nuts and other edible parts of plants, prepared or otherwise preserved	2,733.1	2,446.2	2,371.0	2,539.0	2,761.2	2,666.3	-94.9	-3.4

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
7	Shellfish	3,165.6	2,848.3	2,654.4	3,038.8	3,282.9	2,449.8	-833.1	-25.4
8	Frozen fish	2,724.5	2,624.3	2,276.4	2,255.8	2,189.7	2,164.5	-25.2	-1.1
9	Non-food extracts, natural resins	1,398.0	1,419.9	1,500.8	1,939.5	2,530.2	2,114.7	-415.5	-16.4
10	Animal and vegetable oils and other non-edible fats	367.5	516.0	749.1	1,301.7	2,200.9	1,995.6	-205.3	-9.3
	Other products	48,216.2	47,672.9	46,973.7	51,334.9	60,380.2	63,394.7	3,014.4	5.0
	Total	**73,259.3**	**72,620.5**	**70,924.4**	**78,585.1**	**90,669.1**	**91,176.6**	**507.5**	**0.6**

Source: ITC Trade Map

Export structure of Chinese agricultural products to other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest importers of agricultural products from China were Russia (2.4% of export in value terms), the UAE (1.1%), Saudi Arabia (0.6%), South Africa (0.5%) and Brazil (0,5%). The BRICS member countries accounted for a total of 5.9% of Chinese agricultural export.

The largest importing countries of agro-industrial products from China in 2023 were Hong Kong (11.4%), Japan (10.3%), the USA (10.3%), the Republic of Korea (6.3%) and Vietnam (5.5%). In total the top 10 importing countries accounted for 62.5% of Chinese agro-industrial export in 2023.

The main importing countries of agricultural products from China in value terms, 2018–2023, million US dollars

№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Russia	1,948.5	1,827.8	1,382.6	1,587.1	2,202.2	2,329.8	127.6	5.8
2	UAE	458.3	548.8	499.7	606.2	895.9	1,019.0	123.0	13.7
3	Saudi Arabia	273.1	320.2	335.4	271.4	360.4	533.3	173.0	48.0
4	South Africa	323.7	347.8	297.3	359.7	429.0	479.2	50.2	11.7
5	Brazil	420.4	401.6	408.9	396.3	424.9	436.2	11.3	2.7
6	India	339.8	313.0	265.1	271.2	325.2	415.2	90.0	27.7
7	Egypt	263.8	394.8	292.6	269.2	308.0	239.6	-68.4	-22.2
8	Iran	247.5	160.8	109.1	102.5	154.6	191.6	37.1	24.0
9	Ethiopia	11.0	15.9	11.3	16.0	14.1	22.7	8.6	60.7
	Total BRICS	**4,286.0**	**4,330.7**	**3,602.1**	**3,879.7**	**5,114.3**	**5,666.7**	**552.5**	**10.8**
1	Hong Kong	10,053.8	9,533.7	8,844.7	10,532.2	11,328.2	11,030.8	-297.4	-2.6
2	Japan	10,605.6	10,216.5	9,520.1	10,136.0	10,452.6	10,014.8	-437.8	-4.2
3	USA	8,141.6	6,335.6	6,318.6	7,286.4	10,106.1	9,970.3	-135.7	-1.3
4	South Korea	5,176.6	4,881.8	4,769.9	5,221.0	6,117.0	6,095.8	-21.3	-0.3
5	Vietnam	5,209.9	5,355.2	5,443.0	5,377.4	5,482.1	5,282.7	-199.4	-3.6
6	Malaysia	2,411.7	2,991.7	3,466.3	4,200.4	5,351.8	5,068.0	-283.7	-5.3
7	Thailand	3,285.5	3,657.4	4,222.1	4,575.2	4,821.2	4,585.2	-236.0	-4.9
8	Indonesia	2,157.5	2,477.0	2,248.2	2,383.4	2,684.9	3,020.2	335.3	12.5
9	United Kingdom	1,108.4	1,196.4	1,179.8	1,209.7	2,381.6	2,793.0	411.4	17.3
10	Netherlands	1,574.1	1,632.6	1,749.5	2,150.5	2,934.7	2,711.9	-222.8	-7.6
	Other countries	23,534.6	24,342.6	23,162.2	25,512.7	29,008.8	30,603.8	1,594.9	5.5
	Total non-BRICS	**73,259.3**	**72,620.5**	**70,924.4**	**78,585.1**	**90,669.1**	**91,176.6**	**507.5**	**0.6**
	Total	**77,545.4**	**76,951.2**	**74,526.5**	**82,464.8**	**95,783.4**	**96,843.3**	**1,059.9**	**1.1**

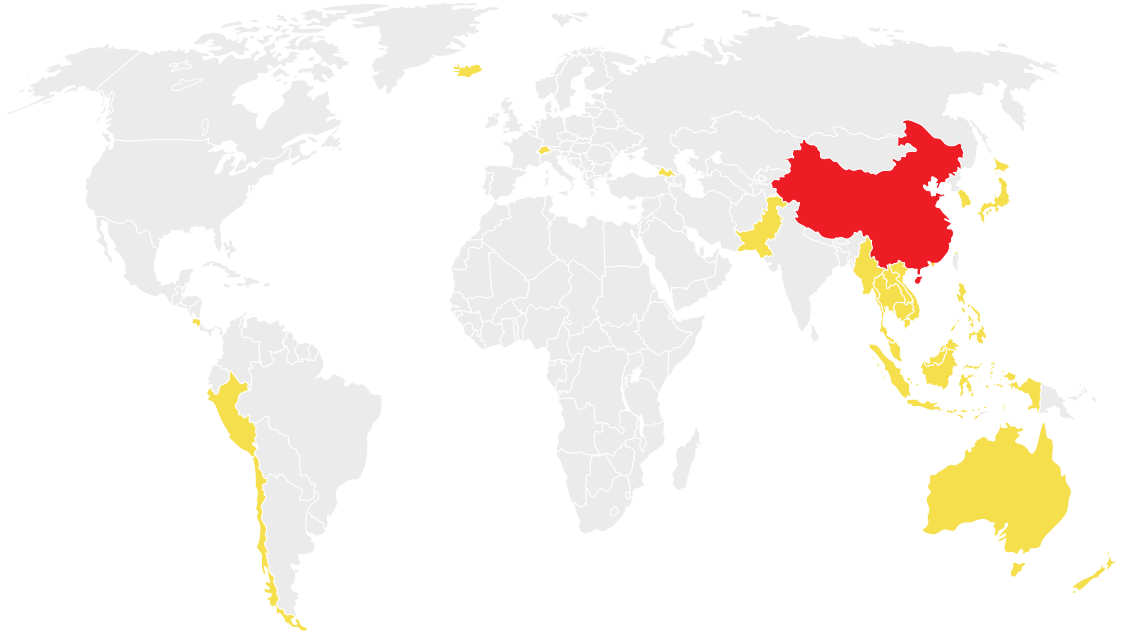
Source: ITC Trade Map

2.4.3.3. International cooperation

China has an extensive network of trade agreements with foreign countries. The largest in terms of the number of participants are the Regional Comprehensive Economic Partnership (RCEP) and the free trade area with the Association of Southeast Asian Nations (ASEAN).

China signed an agreement on trade and economic cooperation with the EAEU in May, 2018. It is not preferential, that is it does not provide for a reduction in duties, but is aimed at increasing the level of transparency of regulatory systems, simplifying trade procedures and developing cooperative ties.

Chinese trade agreements



State/association with which China has entered into a preferential trade agreement	Effective date of the agreement
Hong Kong	2003
Macau	2003
Association of Southeast Asian Nations (ASEAN): Brunei, Myanmar, Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Vietnam, Thailand	2005
Chile	2006
Pakistan	2007
New Zealand	2008
Singapore	2009
Chinese Taipei	2010
Peru	2010
Costa Rica	2011
Iceland	2014
Switzerland	2014
South Korea	2015
Australia	2015
Georgia	2018
Regional Comprehensive Economic Partnership: Brunei, Vietnam, Indonesia, Cambodia, Laos, Malaysia, Myanmar, Singapore, Thailand, Philippines, Australia, New Zealand, South Korea, Japan	2022
Cambodia	2022

2.4.3.4. Special economic zones

A complex multi-level system of economic zones has formed in China. There are more than 15 types of free economic zones, including special economic zones (SEZ), free trade zones (FTZ)[7], national economic and technological development zones (ETDZ), new and high-tech development zones, cross-border economic zones (CBEZ) and also “open” port cities, duty-free and investment areas.

The general coordination of the activities of economic zones is carried out by a special interdepartmental commission, led by a representative of the State Council of the People's Republic of China. There is no uniform legislation at the country level, and each province has its own regulations for regulating different types of economic zones.

FTZs are optimal for locating an office or production in order to enter the Chinese market, as they provide exemption from duties and VAT. As a rule, FTZs offer the following preferences:

- corporate income tax (CIT) reduced to 9–15%;
- payment of CIT in installments;
- personal income tax subsidies for highly qualified specialists;
- duty-free import of machinery and equipment;
- better conditions for customs declaration and payments;
- accelerated VAT refund.

Currently, there are more than 21 FTZs in China, but most of them are aimed at developing high-tech industries. It is advisable for Russian exporters of agricultural products to pay attention to two FTZs: Heilongjiang and Yunnan. Heilongjiang's activities are aimed at expanding trade relations with Russia, mainly in import of timber and grains. Yunan pays special attention to food trade and export processing.

[7] These intrastate economic zones should not be confused with supranational forms of integration in the form of free trade areas.

2.4.3.5. Institutes for supporting the export of agricultural products

Agricultural Trade Promotion Center, Ministry of Agriculture and Rural Affairs of the People's Republic of China, ATPC

Description	The Agricultural Trade Promotion Center of the Ministry of Agriculture and Rural Affairs of the People's Republic of China directly reports to the Ministry of Agriculture and Rural Affairs. It was established in November 2003
Main tasks	• participation in negotiations of the World Trade Organization on agricultural issues, the creation of free trade zones and other international negotiations on trade in agricultural products, as well as provision of technical support to the Ministry in these areas; • participation in the settlement of international disputes in the field of agricultural trade and the revision of trade policies; • assistance in trade in agricultural products and initiating appropriate measures; • monitoring, evaluation and early warning measures on agricultural safety issues; • conducting research in the field of agriculture and trade policy for agricultural products; • collection and analysis of information on domestic and foreign trade in agricultural products and provision of government services; • promoting trade in agricultural products and organizing trade promotion events such as exhibitions and conferences on agricultural trade at home and abroad, and promoting agricultural products in international markets; • managing the activities of the Specialized Sub-council on Agriculture of the China Council for the Promotion of International Trade and the Agricultural Chamber of Commerce of the China Chamber of International Commerce
Contact details	**Address:** Chaoyang District, Maizidian Str., № 20, Beijing **Tel.:** +86 010 5919 4627 **E-mail:** cafteweb@agri.gov.cn **Website:** http://www.mczx.agri.cn/mczx_en/

China Council for the Promotion of International Trade, CCPIT

Description	Founded in 1952, the China Council for the Promotion of International Trade is today the national agency for promoting foreign trade and attracting investment. CCPIT strives to establish broad connections with relevant international organizations, trade and investment promotion agencies, commercial associations and the business community to facilitate various forms of communication and cooperation. Within the structure of the Council there is a special subcommittee dealing with the promotion of agricultural products (Specialized Sub-council of Agriculture of the China Council for the Promotion of International Trade)
Main tasks	• implementation of major national strategies to develop foreign trade and attract investment; • promoting cooperation with foreign partners in trade; • organization of business events for Chinese trade and economic delegations to foreign countries; • organizing the participation of Chinese delegations at international exhibitions, fairs, forums, as well as assistance in organizing exhibitions in China; • participation in the development of trade and economic policies and regulations, conducting foreign trade negotiations and assistance in establishing international commercial agreements; • providing legal advice and commercial arbitration services; • issuance of certificates of origin for export products and other trade documents; • providing services in the field of intellectual property, such as filing patent applications, registering trademarks, and litigation in the field of rights protection; • providing up-to-date trade and economic information, educational services, etc.
Contact details	**Address:** Xi Cheng Qu, Fuxingmenwai Str., №1, Beijing **Tel.:** +86 10 8807 5000 **Website:** https://www.ccpit.org/

Expert opinion

Wandile Sihlobo

Chair Agribusiness Working Group, BRICS Business Council (South Africa)

South Africa produces significant amounts of sugar cane, cereals, various fruits and vegetables. Export opportunities for South Africa's agricultural products are opening within the BRICS countries. Over the past two years, China, the Kingdom of Saudi Arabia and Egypt have widened market access for various agricultural products from South Africa like fruits, wine, meat and grains.

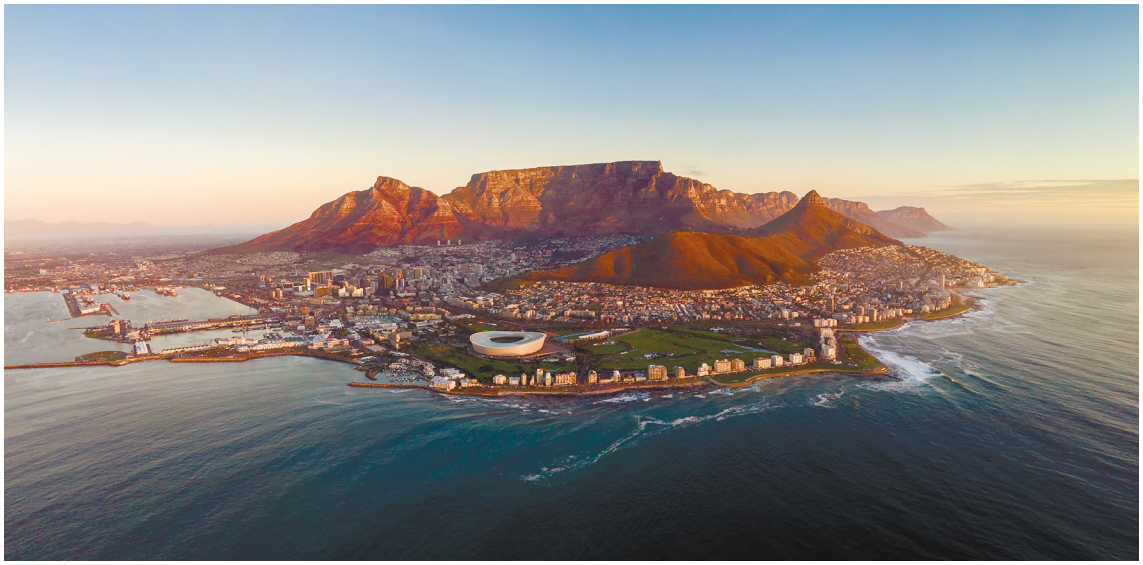
However, South Africa aims to broaden market access in BRICS for most of the country's agricultural products. For this reason, through the 2023 the BRICS Summit in Johannesburg and the prior engagements, South Africa prioritized trade as a significant point on the agenda for discussion. Still each country's trade and agricultural authorities are responsible for taking the lead and seeking market access from member countries. The idea of a BRICS agricultural trade agreement that some argued for has not yet been thoroughly ventilated. With BRICS adding new members to form a bigger BRICS, the agricultural trade opportunities have increased largely due to Egypt and Saudi Arabia, who are major importers of agricultural products.

Russia also remains a strategic partner for South Africa. The South African fruit industry already enjoys access in Russia and there are now prospects for wine export. Russia is among the countries that should widen its exports of fertilizers into South Africa, in addition to wheat and other products. We expect that Russia's chairmanship of BRICS will also keep the issue of agricultural trade development on the agenda. Importantly, as a collective, the BRICS members should address the non-tariff barriers and phytosanitary issues that constrain intra-BRICS trade. This point was raised in Johannesburg in 2023 and should be formally implemented or adopted by members in Russia later in 2024.

2.5. South Africa

2.5.1. Social and economic profile

The Republic of South Africa (South Africa) is the southernmost country of the African continent. In the north it shares a border with Namibia, Botswana and Zimbabwe, in the northeast — with Mozambique and Eswatini, and within the territory of South Africa takes place the kingdom of Lesotho. South Africa is a multi-ethnic country with a diverse number of cultures, religions and languages. There are 12 officials languages enshrined in the Constitution of the country. The country's high level of economic development is ensured by the advanced mining industry (precious and non-ferrous metals, gems, coal) and the service sector.



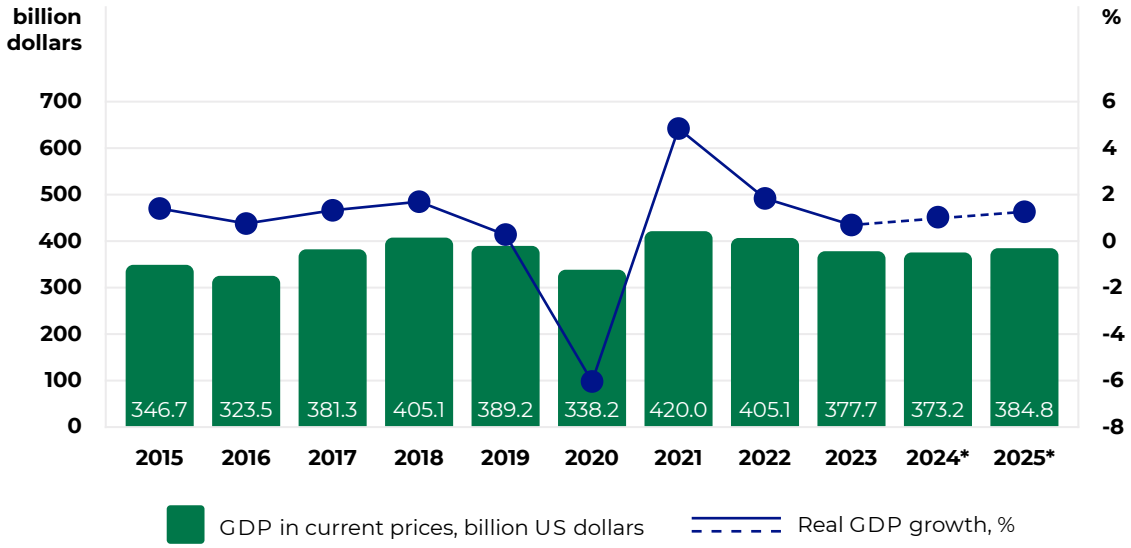
The population of South Africa was estimated at 61.5 million in 2023. The level of urbanization in 2022 has reached 68.3%. The unemployment rate in South Africa in 2022 was 28.8%.

Agriculture accounts for 2.8% of South Africa's GDP, while the industrial and service sectors account for 24.7% and 62.3%, respectively. 19.3% of the population is employed in agriculture, 18.1% — in the industrial sector, while 62.7% is employed in the service sector. In the import structure of South Africa agricultural products accounted for 6.6% of the total volume of imported goods by value in 2022. The share of agricultural products in export is 12.0%.

South Africa is one of the largest and most developed economies on the African continent. The country is rich in various mineral resources, which extraction is an integral part of the South African economy. In recent years South Africa has demonstrated modest rates of economic growth due to the ongoing energy crisis, the depreciation of the national currency, as well as the deterioration of the transport and energy infrastructure facilities.

According to IMF estimates, South Africa's real GDP growth rate in 2023 was 0.6%. The deceleration is due to the ongoing energy crisis and volatility of external demand for South African export. In the medium term solving the country's internal socio-economic problems will allow the country's economy to reach a real GDP growth rate of 1.2% by 2025. Meanwhile the figure will continue to remain below the level of other large African economies (Nigeria and Egypt).

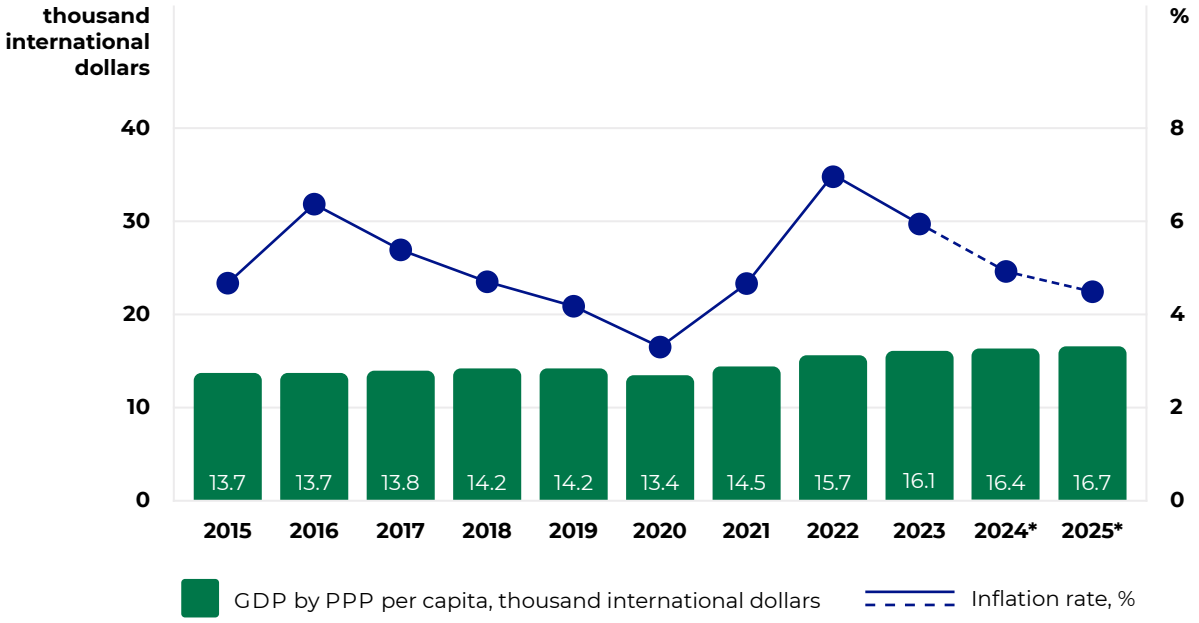
Dynamics of South African GDP in current prices, 2015-2025



Source: IMF
*Note. *forecast, IMF data as of April 16, 2024.*

In 2022 South Africa's annual inflation rate was 6.9%, exceeding the South African Reserve Bank's (SARB) target of 3-6%. The main reasons for the country's increase in consumer prices include disruptions in logistics, currency depreciation, as well as the surge in global energy and food prices. The SARB's stance on tight monetary policy is expected to continue into 2024 against the backdrop of high inflation in 2023 (5.9%). From May, 2023 the SARB key rate has been set at 8.25% (an increase of 475 bps since October 2021). In the medium term annual inflation is expected to fall to 4.5% by 2025, thanks to the stabilization of global prices for energy and food, as well as the high level of the key rate.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

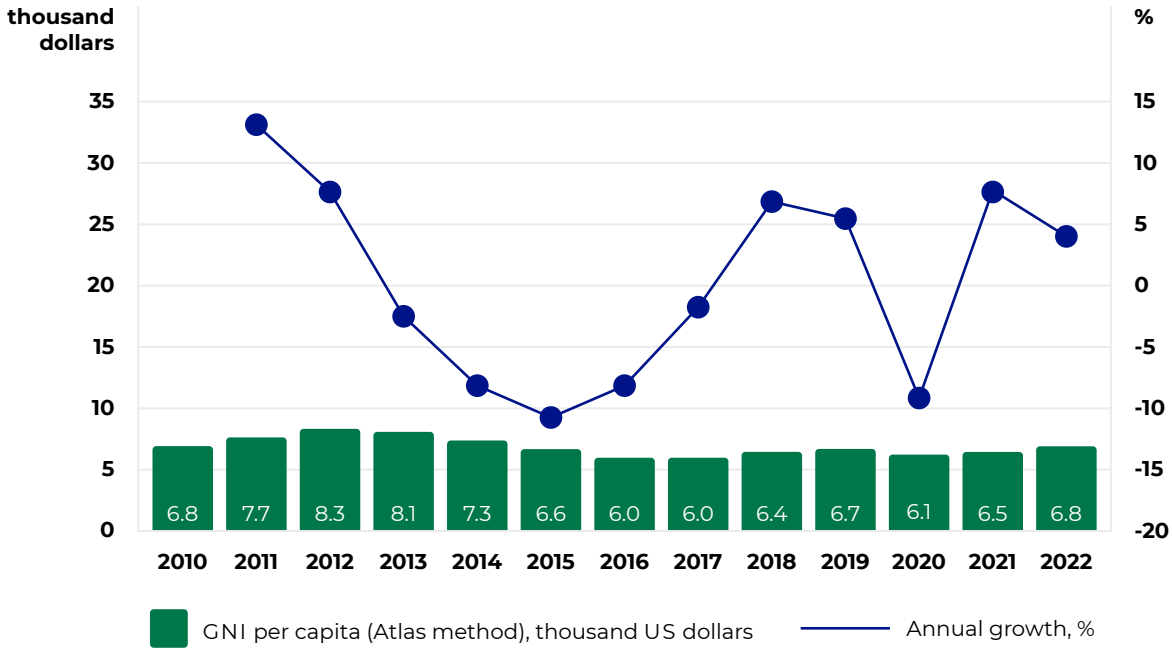


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, South Africa belongs to the group of upper-middle income countries. In 2022 South Africa's GNI per capita was 6.8 thousand US dollars.

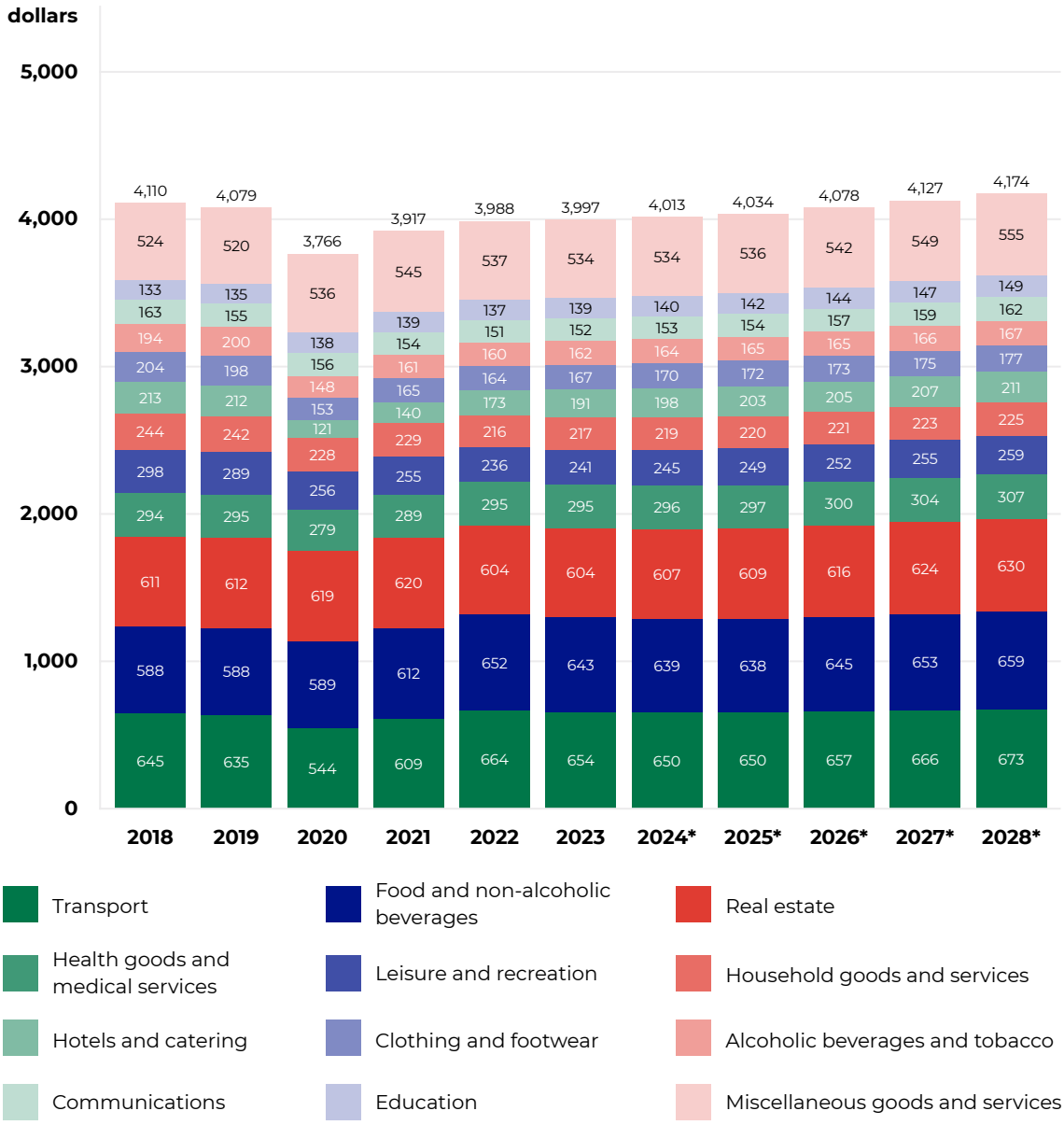
Dynamics of GNI per capita in South Africa, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 at constant prices was 3,997 US dollars, which is 0.2% more than in 2022. The biggest part of the expenditures was spent on transport — about 16.4%. Expenses on food and non-alcoholic beverages were 16.1% and ranked second in the structure of final consumption expenditures. In 2028 final consumption expenditures per capita are expected to reach 4,174 US dollars, of which 659 US dollars will be spent on food and non-alcoholic beverages (15.8%).

Final consumption expenditures in South Africa per capita in constant prices 2023, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.5.2. Agriculture

2.5.2.1. Crop and livestock production

South Africa is one of the countries with unfavorable conditions for agriculture, which is mainly due to arid and hot climate, as well as oversaturation of soil with salts. Although only a limited part of the country's territory is suitable for the cultivation of agricultural crops, South Africa produces significant volumes of grains, sugar cane, various fruits and vegetables, which is possible with advanced tillage and irrigation technologies. South Africa's transport and trade infrastructure is well developed and ensures the efficient distribution of local agricultural products throughout the country's major urban agglomerations.

In 2022 South Africa produced 18.7 million tons of grains. The most common grain crop is corn (16.1 million tons), consumed in both the food and feed industries.

The volume of sugar cane production in South Africa in 2022 amounted to 17.9 million tons, which is 0.5% less than in 2021 (-81.0 thousand tons). The country is actively increasing the production of fruits and berries. In 2022 their total production was 9.0 million tons, of which 2.1 million tons came from grapes and 1.7 million tons from oranges.

Production of crop products, thousand tons

	2018	2019	2020	2021	2022
Cereals	**15,565.7**	**13,872.3**	**18,790.4**	**19,865.1**	**18,685.9**
Corn	13,104.0	11,824.2	15,843.5	16,951.0	16,137.0
Wheat	1,876.0	1,542.0	2,129.0	2,295.0	2,098.0
Barley	421.5	345.0	588.0	334.0	309.0
Sugar cane	**19,301.7**	**19,242.0**	**18,220.0**	**17,991.0**	**17,910.0**
Fruits and berries	**7,580.0**	**7,542.6**	**7,685.7**	**8,231.6**	**9,037.3**
Grape	1,901.7	1,883.9	2,003.9	2,108.6	2,064.7
Oranges	1,774.5	1,687.3	1,499.4	1,614.8	1,747.8
Apples	841.1	893.5	997.3	1,144.8	1,231.7
Vegetables, roots and tubers	**4,463.3**	**4,791.4**	**4,757.9**	**4,670.4**	**4,460.4**
Potato	2,681.0	2,670.0	2,681.0	2,626.0	2,533.0
Onions and shallots (dried)	734.0	742.0	746.0	713.0	737.0
Tomatoes	624.0	570.0	620.0	543.0	534.0
Pulses	**1,657.1**	**1,282.4**	**1,367.3**	**2,015.0**	**1,248.1**

Source: DALRRD (Department of Agriculture, Land Reform and Rural Development), FAOSTAT

The leading livestock industries in South Africa are poultry farming, dairy and beef cattle breeding. In 2022 the production of cow's milk in the country amounted to 3.7 million tons, a decrease of 1.3% from 2021. The volume of commercial milk production in 2022 also showed a decrease of 1.6% and amounted to 3.3 million tons.

The poultry industry, on the contrary, showed a positive dynamic during 2018-2022: poultry production over the past five years has increased by an average of 2.8% per year and chicken eggs — by 4.3%. Pork production for 2018–2022 grew by an average of 6.8% per year but continues to be the least common meat in South Africa. According to the Department of Agriculture, Land Reform and Rural Development of the Republic of South Africa, in 2022 poultry production amounted to 1,976.0 thousand tons (+3.3% from 2021), beef — 1,047.8 (+2.1%) and pork — 345.7 thousand tons (+0.7%).

In 2022 fish production in South Africa amounted to 503.0 thousand tons. Most of the production comes from fishing — 492.4 thousand tons. The aquaculture industry is also gradually developing in the country, but its volumes are still insignificant — in 2021-2022 at the level of 10.5 thousand tons per year.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	**8.97**	**10.66**	**11.21**	**10.36**	**10.60**
Dairy milk, thousand tons	**3,752.6**	**3,873.5**	**3,821.5**	**3,793.8**	**3,744.2**
Dairy commodity milk	3,411.0	3,433.0	3,427.0	3,403.0	3,349.1
Meat, thousand tons	**3,763.4**	**3,897.7**	**3,989.6**	**4,053.0**	**4,054.2**
Poultry	1,766.0	1,855.0	1,929.0	1,912.0	1,976.0
Beef	1,001.1	1,095.5	1,063.2	1,026.0	1,047.8
Pork	265.7	289.4	302.6	343.4	345.7
Fish and seafood, thousand tons	**578.4**	**458.3**	**612.8**	**501.9**	**503.0**
Catch	570.4	449.1	603.0	491.3	492.4
Aquaculture	8.0	9.2	9.8	10.5	10.5

Source: DALRRD, FAOSTAT, OECD, MILK SA

2.5.2.2. Overview of milestones in the agro-industrial complex

1936 New institutions

Founding of National Chamber of Milling (NCM), which is a trade association promoting the collective interests of South African milling companies. NCM has long been one of the most influential industry unions in the country, with member companies currently accounting for up to 40% of all food maize processing in South Africa.

1945 Foreign policy

Accession of the Union of South Africa (as a dominion kingdom of the British Commonwealth) to the International Monetary Fund (IMF) and the International Bank for Reconstruction and Development (IBRD).

1948 Foreign policy

Accession to the General Agreement on Tariffs and Trade (GATT).

1961 Domestic policy

Gaining independence, formation of the Republic of South Africa.

1988 M&A

Nestlé's takeover of the major British chocolate confectionery manufacturer Rowntree. The company's South African subsidiary, Wilson-Rowntree, became part of Nestlé South Africa.

1990 Domestic policy

Adoption of the Agricultural Research Act (No. 86/1990), which established a specialized Agricultural Research Council and defined its composition, tasks and powers. The stated goal of the new body is to promote the development of agriculture by supporting scientific research and introducing advanced technologies into the agro-industrial complex.

1993 Foreign policy

South Africa joins the Food and Agriculture Organization of the United Nations (FAO).

1994 Foreign policy

Joining the Organization of African Unity (OAU), renamed the African Union in 2002, an international intergovernmental organization uniting 55 African states.

1994 Foreign policy

The country's entry into the Southern African Development Community (SADC).

1995 Foreign policy

South Africa's accession to the World Trade Organization (WTO).

1996 New institutions

Formation, under the auspices of the Ministry of Agriculture, Forestry and Fisheries of South Africa, of the National Agricultural Marketing Council (NAMC), whose stated objectives are to improve market access for its participants, increase the efficiency of promotion of agricultural products and optimize the income of producers and the state budget from the export of agricultural products.

1997 Foreign policy

Joining the International Fund for Agricultural Development (IFAD).

1998 Companies

Foundation of Africa SunOil Refineries, which later became a major local manufacturer of vegetable oils, margarine, spreads, soaps and candles.

2002 Development plan

Adoption of the country's Food Security Strategy for the period up to 2015. Among the main goals of the program include increasing the volume of household food production, boosting trade in food products, expansion of income opportunities for citizens, creating new jobs, improving national food and nutrition security, strengthening social protection and emergency management systems related to food shortages.

2008 New institutions

Establishment of the National Consumer Commission (NCC), whose objectives are to protect the interests of consumers, increase their awareness of product quality and provide accessible, transparent and effective consumer protection in South Africa.

2010 M&A

Takeover of South African division of the confectionery manufacturer Cadbury by American conglomerate Kraft Foods for 19 billion US dollars. Thanks to the deal, Kraft Foods has significantly expanded its presence in the markets of developing countries, primarily in Africa.

2011 Foreign policy

South Africa became a part of an intergovernmental association consisting of Brazil, Russia, India and China (BRIC), after which the updated organization changed its name to BRICS.

2011 Companies

Incorporation of the South African subsidiary of the Swiss company Lindt & Sprüngli — Lindt & Sprüngli South Africa, subsequently one of the most prominent players on the confectionery market.

2013 Domestic policy

Adoption of the National Food Security Policy, the strategic goal of which is to ensure the availability and accessibility of quality, safe food both at the national level and at the level of low-income households.

2014 Industry development

Approval of the Agricultural Policy Action Plan (APAP) for 2015-2019, which is designed to contribute to the achievement of national goals in the field of agriculture.

2015 Industry development

South African Department of Rural Development and Land Reform published the Strategic Plan for 2015 - 2020, which involves the implementation of land reform, infrastructure development in rural areas and comprehensive support for farm development.

2018 Domestic policy

The National Assembly voted to begin the process of amending the Constitution to allow land expropriation without compensation.

2018 Foreign policy

Signing of an intergovernmental Agreement on cooperation in the field of agriculture between South Africa and Russia. The document addresses bilateral cooperation in several areas, including livestock and veterinary medicine, crop production and phytosanitary, as well as personnel training and investment.

2019 New institutions

Establishment of the South African Department of Agriculture, Land Reform and Rural Development (DALRRD) by merging the functions of the former Department of Agriculture, Forestry and Fisheries with the Department of Rural Development and Land Reform. The new government structure is responsible for the development of South Africa in the field of agriculture and livestock, ensuring food safety, as well as carrying out land reforms.

2020 M&A

PepsiCo's takeover of Pioneer Foods, South African ready-to-eat food and beverage producer.

2020 Domestic policy

South African Department of Agriculture, Land Reform and Rural Development published the Strategic Development Plan for 2020 - 2025, the implementation ofwhich involves:

- increasing production volumes of the main agricultural goods (grains, fruits and vegetables, sugar cane, meat products) and increasing their supplies to foreign markets;
- allocation of additional land plots for small landowners;
- introduction of modern methods of combating agricultural pests and animal diseases;
- implementation of spatial planning and land use management systems, etc.

2022 Industry development

Approval of the Agricultural and Agro-Processing Master Plan «Social Contract» (AAMP), aimed at restructuring and diversifying the South African economy, solving the problems of slow economic growth and strengthening the country's food security. AAMP also includes the implementation of a range of sustainable development measures, including reducing carbon dioxide emissions and increasing the population’s access to water, including for irrigation.

2023 Industry development

Launch of the Agricultural Energy Fund (AEF) to finance farms and help mitigate the impact of power outages. The focus will be on energy-intensive agricultural activities such as irrigation, intensive agricultural production systems and cold chain activities.

2024 M&A

The second largest PepsiCo beverage bottling company in the world outside of the US and the largest in the regions of Africa, Middle East and South Asia, India's Varun Beverages has completed the acquisition of BevCo, the South African manufacturer and distributor of PepsiCo beverages. As the result of the deal, valued at13.2billion Indian rupees, Varun Beverages has significantly expanded its presence in South Africa's soft drinks market, which is the largest in Africa.

2.5.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

South Africa is one of the countries that does not have sufficient conditions for agriculture, however the country still manages to produce significant amounts of grains, sugar cane, various fruits and vegetables. South Africa is completely self-sufficient in corn, fruits (citrus fruits, apples, grapes, pears, etc.), soybeans, and is also a net exporter of high value-added products (grape wines, cider and other fermented drinks, fruit juices).

An important element of the Strategic Development Plan for 2020-2025, which was adopted in 2020, is to increase production of grain crops, fruits and vegetables, sugar cane and meat products in South Africa, also to increase the supply of these products to foreign markets.

Sustainable development of agriculture

The land reform remains the main focus of South Africa's agricultural development policy. Sustainable development of agriculture in the country involves ensuring equal access to land resources for all population groups, creating new jobs in rural areas and villages, expanding the area of agricultural land with modern irrigation systems. By 2030, according to the national development plans, the country plans to create about 1 million jobs in agriculture and increase the area of irrigated land by a third. These measures will improve the standard of living for rural residents, as well as improve the food security of socially vulnerable population groups.

Consumption of healthy, functional and organic products

The diet of South Africans is currently unbalanced — it is dominated by high-calorie grains (corn, wheat). The country's National Development Plan calls for changing the diet of South Africans, especially in rural areas, in favor of fruits, vegetables and livestock products, while reducing consumption of saturated fat, sugar and salt. In South Africa's major urban agglomerations, higher-income residents are showing increased interest in imported functional (beverages, plant-based protein products) and organic products. At the same time organic farming in South Africa is in its infancy and is a promising area of agriculture.

2.5.2.4. Key agricultural producers

The largest agricultural holdings in South Africa[8]

RCL FOODS

Activities	Production, processing, distribution, import, export
Industry	Meat, animal feed, grain processing, ready-to-eat products, drinks
Description	RCL Foods is one of South Africa's leading food manufacturers. It was founded in 1960. Currently part of the South African holding company Remgro (more than 80% of the shares belong to Remgro Limited). It operates more than 30 production sites domestically and more than 20 distribution centers domestically and in neighboring Namibia, Botswana and Zambia, and employs more than 16 thousand people. The company produces a wide range of food products, including products with high added value: cookies, bakery products, sauces, drinks, as well as semi-finished meat products, wheat and corn flour, sugar, feed for livestock and house pets. The company's products are sold under brand names such as Rainbow, Pieman's, Ouma, Monati, Nola, Driehoek Feeds, Bobtail and private labels. In 2023 the company's revenue was 1.98 billion US dollars
Contact Information	**Address:** 10, The Boulevard Westway Office Park, Westville, 3629 **Tel.:** +27 031 242 8600 **Website:** https://rclfoods.com/

Tiger Brands

Activities	Production, processing, distribution, import, export
Industry	Ready-to-eat products, drinks, grain processing
Description	Tiger Company Brands is one of Africa's largest fast-moving consumer goods (FMCG) companies. The main activity of the company is production, promotion and distribution of food and beverages. The company's products are sold in more than 50 thousand stores across the country and are also represented on the market in 29 countries on the continent. Tiger Brands operates over 40 manufacturing sites domestically and internationally — in Lesotho, Eswatini, Namibia, Botswana and Cameroon. The company has a diverse portfolio of food products, including bakery products, flour and baking mixes, pasta, confectionery sugar products, ready-made cereals, canned goods, rice, sauces, jams and drinks. Products are sold under the brands Fatti's & Moni's, Tastic, Albany, Tinkies, Beacon, Black Cat, Koo, Golden Cloud and others. In 2023 the company's revenue was 1.96 billion US dollars
Contact Information	**Address:** 3010, William Nicol Drive, Bryanston **Tel.:** +27 0860 005 342 **Website:** https://www.tigerbrands.com/

[8] According the rating: Sunday Times Top 100 Companies and Les 500 premières entreprises africaines

Distell Group

Activities	Production, processing, distribution, import, export
Industry	Beverages
Description	A major South African manufacturer and distributor of spirits, fine wines, ciders and ready-to-drink beverages. In 2022 the company was acquired by Heineken holding Beverages (a company with operations in the South African and Namibian markets), which in turn is part of the Remgro group. Distell produces and markets wines, spirits and flavored alcoholic beverages in South Africa and internationally. Products are sold under the brands Savanna, Extreme, Bernini, Klipdrift Export, JC Le Roux, Nederburg and others. There are more than 3.7 thousand employees. As of April 30, 2023 the company's revenue was 1.67 billion US dollars
Contact Information	**Address:** 54 Wierda Rd W, Wierda Valley, Sandton **Tel.:** +27 010 226 5000 **Website:** https://www.heinekenbeverages.co.za/

Astral Foods

Activities	Production, processing, distribution, import, export
Industry	Meat, animal feed
Description	One of South Africa's leading integrated poultry producers and processors. The company was founded and listed on the JSE in 2001. The company has more than 12 thousand employees. The main activities of the company are the production of livestock feed, poultry farming and poultry meat processing, the production of semi-finished meat products and hatching eggs. The company operates 8 feed mills, particularly in Zambia, 178 poultry enterprises, 4 processing plants, as well as its own research and development laboratories. By the end of 2023 production capacity for meat processing amounted to more than 500 thousand tons of poultry. The company’s meat products are sold under such brands as Goldi, Country Fair, Festive Fresh Chicken, Mountain Valley. In 2023 the company’s revenue amounted to 1.01 billion US dollars
Contact Information	**Address:** Lanseria Corporate Estate, 13 Thunderbolt Lane, Lanseria Ext 26 **Tel.:** +27 012 667 5468 **Website:** https://www.astralfoods.com/index.html; https://www.astralchicken.com/

Anglovaal Industrial Holdings (AVI Limited)

Activities	Production, processing, distribution, import, export
Industry	Ready-to-eat products, drinks
Description	South African consumer goods company. The company is engaged in the production, processing, marketing and sale of food, beverages, footwear, clothing and cosmetics. In total, the group's roster includes more than 50 brands, including Snackworks in the segment of flour confectionery and snacks, Entyce Beverages in the beverage category, Ciro, I&J in the seafood segment and others. The company has more than 9 thousand employees. In 2023 the company's revenue amounted to 793 million US dollars
Contact Information	**Address:** 2 Harries Road, Illovo, Johannesburg **Tel.:** +27 011 502 1300 **Website:** https://www.avi.co.za/

Oceana Group

Activities	Production, processing, distribution, import, export
Industry	Fish, ready-to-eat products
Description	A large fishing company in South Africa founded in 1918. In addition to fishing, the company is engaged in food processing and sales in both domestic and foreign markets. The company has more than 3 thousand employees. Oceana Group operates 46 vessels and 8 production and fishing facilities in South Africa, Namibia and the USA. The products are sold in 36 countries, including African countries, Japan, Hong Kong, the USA and European countries. The Group has a diverse range of products, including canned fish products, fishmeal and fish oil, frozen fish, live fish and seafood. The company also purchases and sells canned meat and vegetables. Every year the company processes about 470 thousand tons of fish and seafood. Products being implemented under brands Lucky Star, Daybrook, Blue Continent Products. In 2023 the company's revenue amounted to 525 million US dollars
Contact Information	**Address:** 7th Floor, Oceana House, 25 Jan Smuts Street Foreshore, Cape Town **Tel.:** +23 021 410 1453 **Website:** https://www.oceana.co.za/

Rhodes Foods Group (RFGH Ltd.)

Activities	Production, processing, distribution, import, export
Industry	Ready-to-eat products
Description	South Africa's leading manufacturer of fresh, frozen, convenience and shelf-stable foods. The original jam production company was founded in 1896 and the company has had its current name since 1999. The main activity is the production and sale of fast food products, which include ready-made meals, pies and other bakery and confectionery products, dairy products, fruit juices, fruit purees and concentrates, as well as shelf-stable dishes, including jams, fruits, salads, vegetables, meat and dry packaged foods. The company's products are sold under the brands Rhodes, Bull Brand, Magpie, Squish, Hinds and Today, as well as private labels. The company's production facilities include 15 factories domestically and in neighboring Eswatini. The company's main export markets are: Europe, USA, Canada, Australia, Russia and countries in the Middle East. In 2023 the company's revenue was 419 million US dollars
Contact Information	**Address:** Pniel Road, Groot Drakenstein, 7680, Western Cape **Tel.:** +27 021 870 4000 **Website:** https://www.rfg.com/

Quantum Foods Anglovaal Industrial Holdings (AVI)

Activities	Production, processing, distribution, import, export
Industry	Animal feed, meat
Description	A fully integrated enterprise with a diversified business portfolio, which includes feed and poultry production. The company was originally founded in 2013 to supply the Pioneer Food Group. Today, Quantum Foods Anglovaal Industrial Holdings is an independent company and operates more than 40 production sites, including feed mills, egg processing plants both domestically and in Uganda, Mozambique and Zambia, and also raises and markets broilers and day-old chicks. The company has more than 2.5 thousand employees. The company's feed products are sold under the brand Nova Feeds, poultry products, including table eggs, are produced under the brands Bergvlei Chicks, Nulaid, Safe Eggs, Quantum, Tydstroom Poultry, as well as private labels. At the end of 2023 the company supplied more than 730 thousand tons of feed, 75 million day-old chicks, 970 million eggs and egg products. In 2023 the company's revenue amounted to 400 million US dollars
Contact Information	**Address:** 11 Main Road, Wellington, Western Cape **Tel.:** +27 021 864 8600 **Website:** https://quantumfoods.co.za/

Ingrain (Barloworld Limited)

Activities	Production, processing, distribution, import, export
Industry	Feed, glucose
Description	The large South African conglomerate founded in 1902 specializes in two main areas: the production of industrial equipment and the production of technological solutions in the field of food and ingredients, which is responsible for its subsidiary Ingrain. Ingrain is one of Africa's largest producers of unmodified and modified maize starch, glucose and other related products. The company was formed as part of the Barloworld group as a result of the acquisition of Tongaat Hulett Starch in 2020. Its product portfolio includes feed additives, glucose powder and glucose syrup, modified and unmodified corn starch. It is the only producer of starch and glucose in South Africa providing 89% of the South African market and processes more than 850 thousand tons of corn annually. The main export destinations are the countries of the African continent. The company operates 4 processing plants within the country with a total capacity of about 900 thousand tons per year. The staff consists of 900 employees. In 2023 the revenue of the Barloworld holding amounted to about 2.4 billion US dollars, of which the revenue of Ingrain was 350 million US dollars
Contact Information	**Address:** Private Bag 2019, Isando, 1600, Gauteng **Tel.:** +27 11 458 5000 **Website:** https://ingrainsa.com/index.php; https://www.barloworld.com/index.php

Sea Harvest Group

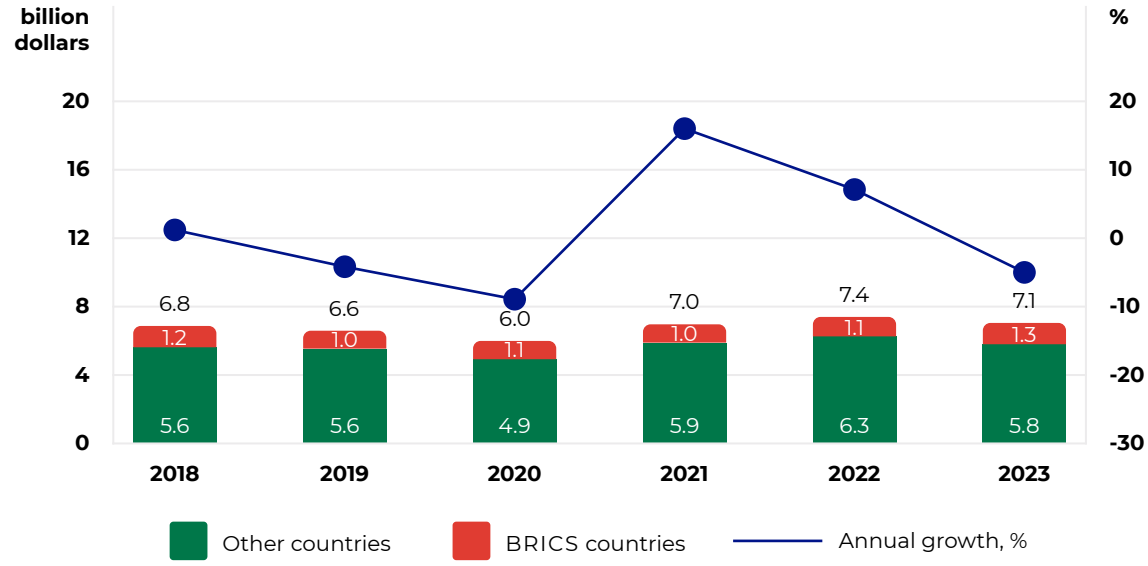
Activities	Production, processing, distribution, import, export
Industry	Fish, ready-to-eat products
Description	A leading company in the processing of fish and seafood, agricultural products and consumer goods. The group was founded in 1964 and consists of 4 subsidiaries today: Sea Harvest, Sea Harvest Australia, Sea Harvest Aquaculture, Cape Harvest Foods, which are engaged in fishing, fish and seafood trade, and processing of dairy products. The group has more than 4 thousand employees. The Sea Harvest Group operates 57 ships domestically and abroad, 11 processing plants, 9 factory stores. The range of caught and processed products includes hake, mackerel, deep-sea shrimp, anchovies, sardines, crab, scallop, as for finished products — they include semi-finished fish products, cheese, butter, finished dairy products, milk powder and whey. The products are sold under the brands Sea Harvest, Viking Aquaculture, Ladismith Cheese. In 2023 the company's revenue amounted to 330 million US dollars
Contact Information	**Address:** 1st Floor, Block C, Boulevard Office Park, Searle Street, Woodstock **Tel.:** +27 21 468 7900 **Website:** https://www.seaharvest.co.za/; https://seaharvestgroup.co.za/

2.5.3. Foreign trade in agricultural products

2.5.3.1. Import of agricultural products

In 2023 the import of South African agricultural products amounted to 7.1 billion US dollars, which is 4.7% (-351.9 million US dollars) below the level of 2022. In 2023 import from the BRICS countries increased by 11.9% (+134.0 million US dollars) compared to the previous year, while import from other countries decreased by 7.7% (-485.9 million US dollars). Import volume of agricultural products for 2018-2023 increased by an average of 0.6% per year.

Import of agricultural products of South Africa, 2018-2023, billion US dollars



Source: ITC Trade Map

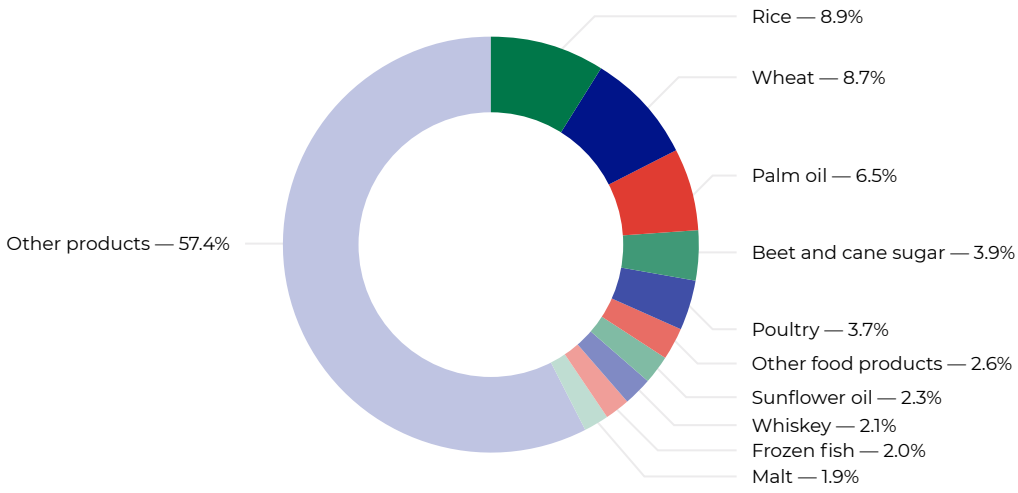
In 2023 the top 5 imported agricultural products of South Africa included rice (8.9% of import value), wheat (8.7%), palm oil (6.5%), beet and cane sugar (3.9%) and poultry (3.7%). In total the top 10 commodity items accounted for 42.6% of import of South African agricultural products in value terms.

Import structure of South African agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Rice	523.0	449.8	546.7	504.4	478.3	631.6	153.3	32.1
2	Wheat	406.5	394.6	492.8	463.5	636.3	613.8	-22.4	-3.5
3	Palm oil	298.8	270.5	325.4	509.2	659.5	459.3	-200.2	-30.4
4	Beet and cane sugar	305.9	303.2	282.6	287.6	230.1	273.7	43.6	19.0
5	Poultry	493.5	422.5	312.6	360.7	278.7	258.9	-19.8	-7.1
6	Other food products	186.0	181.2	180.1	210.5	197.1	181.3	-15.9	-8.0
7	Sunflower oil	117.4	173.9	163.4	90.4	279.8	165.4	-114.4	-40.9
8	Whiskey	172.2	170.2	107.0	145.2	171.0	151.6	-19.5	-11.4
9	Frozen fish	176.3	168.0	120.4	162.0	194.1	140.9	-53.2	-27.4
10	Malt	45.1	45.4	27.6	64.3	79.0	133.6	54.6	69.1
	Other products	4,118.2	4,007.6	3,428.8	4,156.4	4,213.7	4,055.6	-158.1	-3.8
	Total	**6,843.0**	**6,587.0**	**5,987.5**	**6,954.4**	**7,417.6**	**7,065.7**	**-351.9**	**-4.7**

Source: ITC Trade Map

Import structure of South African agricultural products in value terms, 2023, %



Source: ITC Trade Map

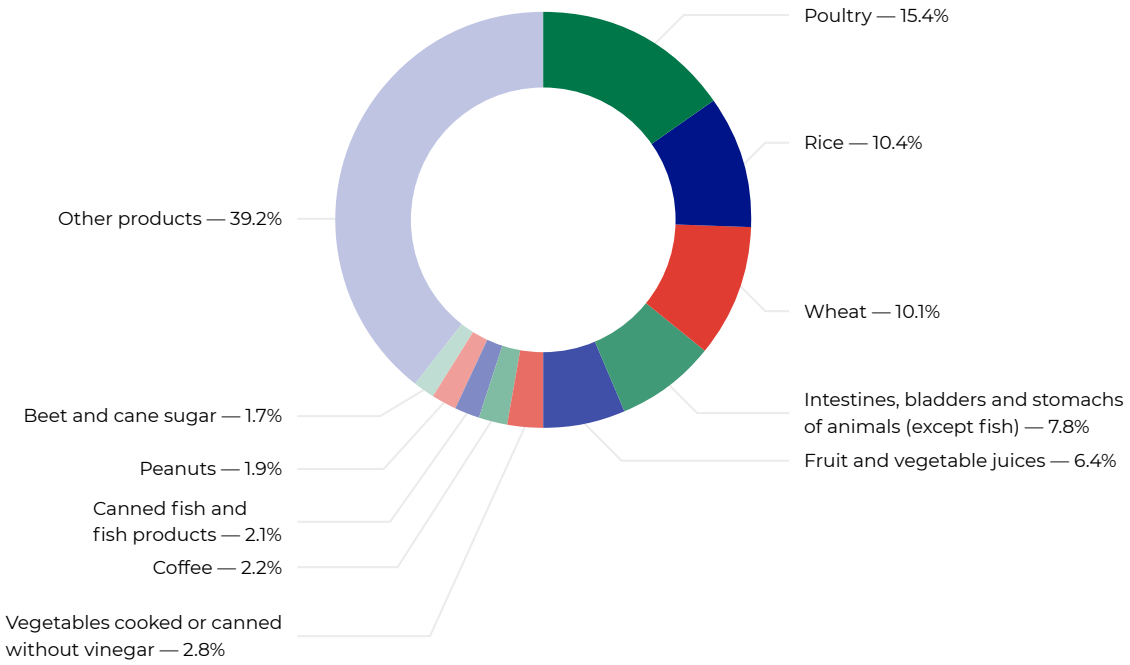
At the end of 2023 South Africa's import structure from the BRICS countries was dominated by poultry (15.4% of import value). The top 5 imported agricultural products also included rice (10.4%), wheat (10.1%), intestines, bladders and stomachs of animals (except fish) (7.8%) and fruit and vegetable juices (6.4 %). In total the top 10 commodity items accounted for 60.8% of import of South African agricultural products from the BRICS countries in value terms.

Import structure of South African agricultural products from the BRICS countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Poultry	277.9	172.9	138.2	213.4	202.9	194.5	-8.3	-4.1
2	Rice	147.0	110.2	185.1	125.4	93.8	131.0	37.2	39.7
3	Wheat	176.3	99.3	131.2	33.5	104.6	128.1	23.5	22.4
4	Intestines, bladders and stomachs of animals (except fish)	83.7	83.9	73.0	94.9	94.0	99.0	4.9	5.3
5	Fruit and vegetable juices	48.7	55.2	39.0	65.6	81.7	80.8	-0.9	-1.1
6	Vegetables cooked or canned without vinegar	7.8	14.1	8.3	11.7	17.1	35.6	18.5	2.1 times
7	Coffee	9.4	22.2	32.1	26.8	19.4	27.7	8.2	42.5
8	Canned fish and fish products	29.0	23.1	17.3	19.4	29.1	27.1	-2.0	-6.8
9	Peanuts	7.4	16.2	16.7	16.9	10.6	23.7	13.1	2.2 times
10	Beet and cane sugar	47.9	19.5	19.9	10.4	3.8	21.4	17.6	5.7 times
	Other products	386.1	404.0	391.6	419.0	474.0	496.2	22.2	4.7
	Total	**1,221.2**	**1,020.6**	**1,052.1**	**1,037.0**	**1,130.9**	**1,265.0**	**134.0**	**11.9**

Source: ITC Trade Map

Import structure of South African agricultural products from the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

In 2023 the top 5 imported agricultural products of South Africa included rice (8.6% of import value), wheat (8.4%), palm oil (7.9%), beet and cane sugar (4.3%) and sunflower oil (2.9%). In total the top 10 commodity items accounted for 43.3% of import of South African agricultural products from other countries in value terms.

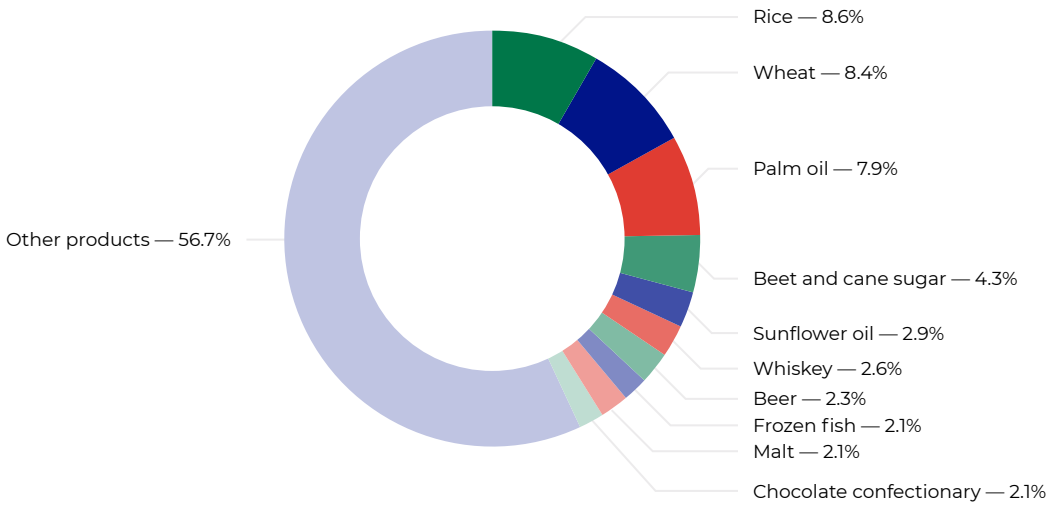
Import structure of South African agricultural products from other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Rice	376.0	339.6	361.7	379.0	384.5	500.6	116.1	30.2
2	Wheat	230.2	295.2	361.7	430.0	531.6	485.7	-45.9	-8.6
3	Palm oil	298.6	270.5	325.3	509.2	659.5	459.2	-200.3	-30.4
4	Beet and cane sugar	258.0	283.7	262.7	277.2	226.3	252.3	26.0	11.5
5	Sunflower oil	116.7	173.9	163.4	90.4	279.8	165.4	-114.3	-40.9
6	Whiskey	171.8	170.0	105.4	144.9	170.9	151.5	-19.4	-11.3
7	Beer	161.7	242.4	112.3	143.4	126.5	132.4	5.8	4.6
8	Frozen fish	158.9	148.9	110.8	130.4	162.5	124.0	-38.5	-23.7

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
9	Malt	45.1	45.4	27.6	59.8	79.0	122.0	43.0	54.4
10	Chocolate confectionery	111.2	104.0	98.1	110.1	111.9	119.4	7.5	6.7
	Other products	3,693.5	3,492.7	3,006.4	3,642.9	3,554.1	3,288.2	-265.9	-7.5
	Total	**5,621.8**	**5,566.4**	**4,935.4**	**5,917.4**	**6,286.7**	**5,800.8**	**-485.9**	**-7.7**

Source: ITC Trade Map

Import structure of South African agricultural products from other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest exporters of agricultural products to South Africa were China (5.8% of import in value terms), Brazil (5.6%), India (3.8%) and Russia (1.7%). In total the BRICS countries accounted for 17.9% of import of South African agricultural products.

Also among the largest exporting countries in 2023 were Thailand (8.2% of import in value terms), Indonesia (6.0%) and Eswatini (5.5%). Collectively, the top 10 countries accounted for 51.5% of South African agricultural import in value terms.

The main countries exporting agricultural products to South Africa in value terms, 2018–2023, million US dollars

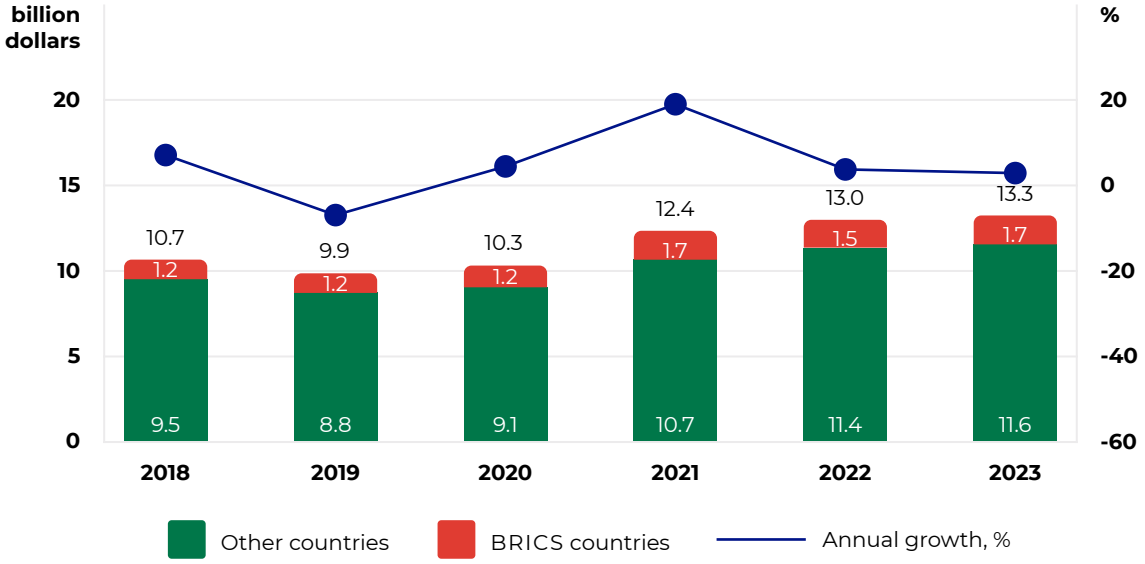
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	304.7	308.3	270.8	313.1	385.4	413.0	27.6	7.2
2	Brazil	410.3	316.2	312.2	352.4	396.8	392.4	-4.3	-1.1
3	India	237.2	222.4	267.4	245.6	224.2	266.8	42.6	19.0
4	Russia	186.9	111.6	134.5	59.2	44.1	117.1	73.0	2.7 times
5	Egypt	20.3	24.3	26.0	22.7	24.3	32.3	8.0	32.9
6	UAE	48.7	26.5	31.9	32.0	42.4	30.3	-12.1	-28.5
7	Ethiopia	6.2	6.5	5.3	6.5	7.3	7.3	-0.03	-0.4
8	Saudi Arabia	5.1	4.0	3.2	4.6	5.7	5.0	-0.6	-11.3
9	Iran	1.7	0.8	0.9	1.0	0.8	0.7	-0.1	-7.6
	Total BRICS	**1,221.2**	**1,020.6**	**1,052.1**	**1,037.0**	**1,130.9**	**1,265.0**	**134.0**	**11.9**
1	Thailand	503.1	463.0	431.4	456.6	474.2	578.8	104.6	22.1
2	Indonesia	231.5	224.6	267.7	463.5	587.1	423.6	-163.6	-27.9
3	Eswatini	312.8	353.4	339.1	400.2	357.8	390.5	32.7	9.1
4	France	240.4	221.4	181.8	258.9	290.5	318.6	28.0	9.6
5	Poland	92.0	126.6	228.0	124.1	188.0	312.0	124.0	66.0
6	Netherlands	254.6	252.9	242.7	287.0	209.3	281.1	71.8	34.3
7	Namibia	450.5	372.2	216.3	283.7	337.8	265.6	-72.3	-21.4
8	USA	291.5	333.7	237.3	271.4	226.3	212.2	-14.1	-6.2
9	United Kingdom	281.7	276.7	205.7	239.6	251.2	205.4	-45.8	-18.2
10	Belgium	105.3	102.2	103.2	117.9	131.1	196.3	65.1	49.7
	Other countries	2,858.3	2,839.7	2,482.1	3,014.4	3,233.3	2,616.9	-616.5	-19.1
	Total non-BRICS	**5,621.8**	**5,566.4**	**4,935.4**	**5,917.4**	**6,286.7**	**5,800.8**	**-485.9**	**-7.7**
	Total	**6,843.0**	**6,587.0**	**5,987.5**	**6,954.4**	**7,417.6**	**7,065.7**	**-351.9**	**-4.7**

Source: ITC Trade Map

2.5.3.2. Export of agricultural products

Export of South African agricultural products in 2023 amounted to 13.3 billion US dollars, which is 2.2% (+289.2 million US dollars) higher than in 2022. In 2023 export to the BRICS countries increased relative to the previous year by 7.6% (+116.9 million US dollars), export to other countries increased by 1.5% (+172.3 million US dollars). For 2018-2023 South Africa's agricultural export increased by an average of 4.5% per year.

Export of agricultural products of South Africa, 2018-2023, billion US dollars



Source: ITC Trade Map

The main export product of the South African agro-industrial complex in 2023 was corn (9.1%). The products that also accounted for a large share of export were oranges (5.9%), grape wines (4.7%) and fresh grapes (4.6%). In total the top 10 exported types of products accounted for 43.9% of the value of South African agricultural export.

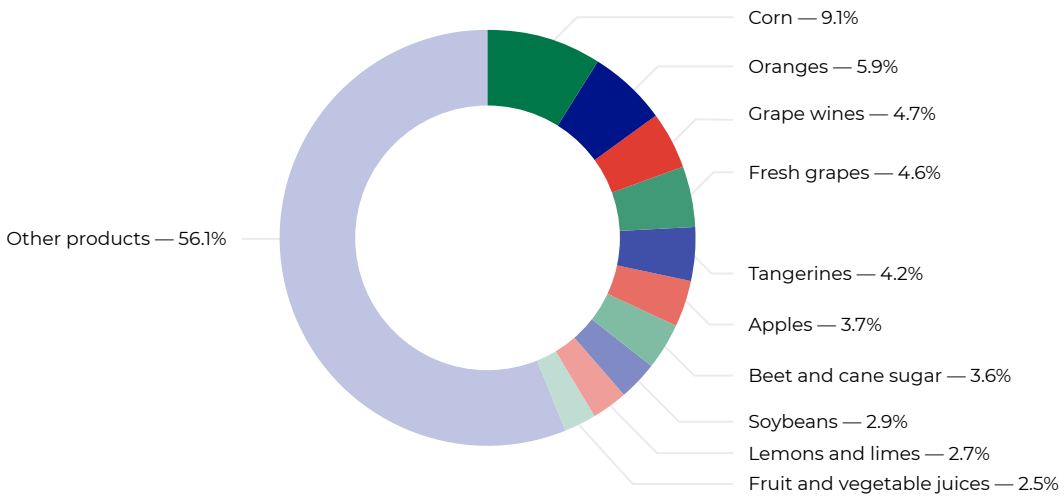
Export structure of South African agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Corn	456.0	281.1	564.6	809.3	1,212.2	1,209.5	-2.7	-0.2
2	Oranges	819.2	667.1	797.9	808.6	762.7	779.8	17.1	2.2
3	Grape wines	787.8	663.0	621.3	750.4	697.2	617.9	-79.3	-11.4
4	Fresh grapes	541.9	521.2	520.2	708.5	764.3	615.2	-149.1	-19.5

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
5	Tangerines	252.8	260.9	390.0	507.3	463.9	563.3	99.3	21.4
6	Apples	389.9	376.0	410.6	486.1	490.4	486.5	-3.9	-0.8
7	Beet and cane sugar	380.6	492.4	369.7	277.1	293.6	475.4	181.8	61.9
8	Soybeans	14.9	3.4	3.5	26.1	167.1	385.3	218.2	2.3 times
9	Lemons and limes	269.6	282.2	375.8	347.8	357.3	359.2	1.9	0.5
10	Fruit and vegetable juices	319.0	266.1	249.6	314.5	286.6	333.8	47.1	16.4
	Other products	6,422.5	6,113.3	6,044.4	7,368.4	7,485.8	7,444.5	-41.3	-0.6
	Total	**10,654.2**	**9,926.5**	**10,347.5**	**12,404.2**	**12,981.0**	**13,270.3**	**289.2**	**2.2**

Source: ITC Trade Map

Export structure of South African agricultural products in value terms, 2023, %



Source: ITC Trade Map

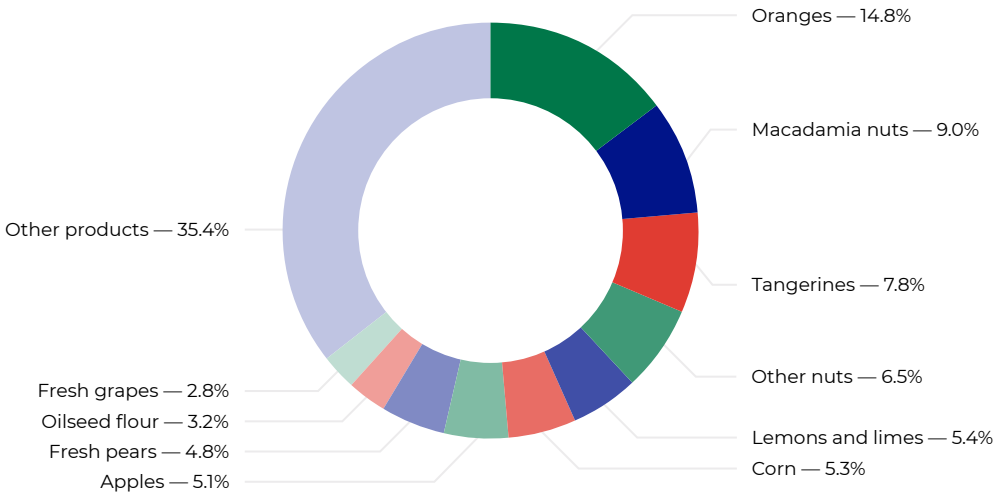
The main products of export of South African agro-industrial complex to the BRICS countries in 2023 were oranges (14.8%), macadamia nuts (9.0%), tangerines (7.8%), and other nuts (6.5%). In total the top 10 exported types of products accounted for 64.6% of the value of South African agricultural export.

Export structure of South African agricultural products to the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Oranges	254.6	208.7	211.7	224.1	236.9	245.5	8.6	3.6
2	Macadamia nuts	26.5	41.3	50.6	66.3	116.8	148.9	32.0	27.4
3	Tangerines	49.5	46.9	74.2	110.8	115.7	129.4	13.7	11.8
4	Other nuts	40.5	82.7	88.1	77.4	144.4	108.3	-36.1	-25.0
5	Lemons and limes	82.1	84.6	101.5	89.7	91.1	89.3	-1.8	-2.0
6	Corn	14.8	24.4	13.3	25.2	27.4	87.4	60.0	3.2 times
7	Apples	33.9	38.5	63.4	70.7	85.9	84.1	-1.8	-2.1
8	Fresh pears	66.2	64.7	77.4	78.8	94.1	79.5	-14.6	-15.5
9	Oilseed flour	1.3	0.6	0.5	2.8	1.4	53.7	52.2	38.0 times
10	Fresh grapes	42.7	37.5	37.7	39.3	42.0	46.0	4.0	9.6
	Other products	549.0	522.2	508.8	904.9	586.1	586.6	0.5	0.1
	Total	**1,161.0**	**1,151.9**	**1,227.2**	**1,690.0**	**1,541.8**	**1,658.8**	**116.9**	**7.6**

Source: ITC Trade Map

Export structure of South African agricultural products to the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

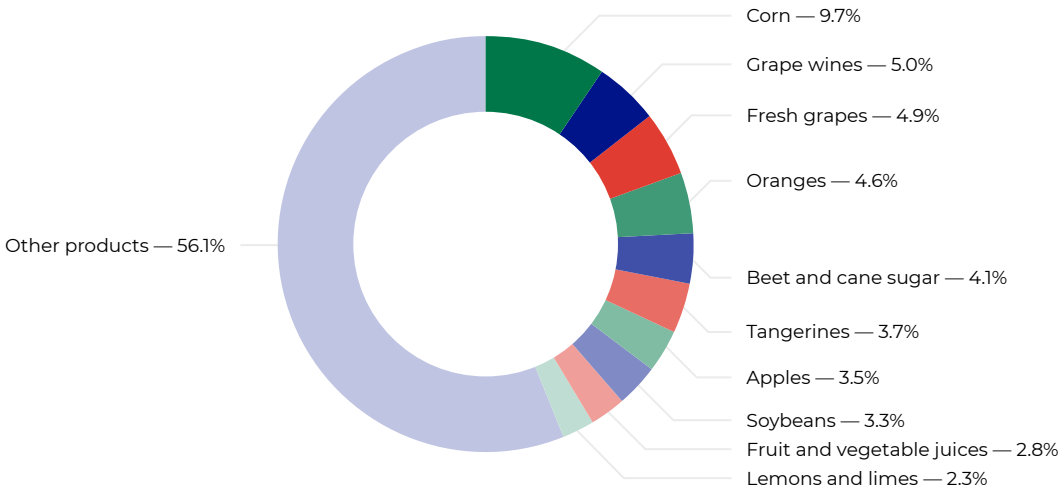
The main agricultural products of export from South Africa to other countries in 2023 were corn (9.7%), grape wines (5.0%), fresh grapes (4.9%), and oranges (4.6%). In total the top 10 exported types of products accounted for 43.9% of the value of South African agricultural export.

Export structure of South African agricultural products to other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Corn	441.2	256.7	551.3	784.1	1,184.7	1,122.1	-62.7	-5.3
2	Grape wines	707.2	602.3	577.1	692.6	650.6	580.3	-70.3	-10.8
3	Fresh grapes	499.3	483.7	482.5	669.2	722.3	569.2	-153.1	-21.2
4	Oranges	564.5	458.4	586.2	584.5	525.8	534.2	8.5	1.6
5	Beet and cane sugar	344.1	442.6	346.8	277.1	293.6	475.4	181.8	61.9
6	Tangerines	203.3	214.1	315.9	396.5	348.2	433.9	85.7	24.6
7	Apples	356.0	337.5	347.2	415.4	404.5	402.4	-2.1	-0.5
8	Soybeans	14.9	3.4	3.5	26.1	167.0	385.3	218.3	2.3 times
9	Fruit and vegetable juices	311.4	257.1	241.7	307.1	279.8	324.2	44.4	15.9
10	Lemons and limes	187.4	197.5	274.3	258.1	266.2	269.9	3.7	1.4
	Other products	5,863.8	5,521.3	5,393.9	6,303.4	6,596.6	6,514.7	-81.9	-1.2
	Total	**9,493.2**	**8,774.6**	**9,120.3**	**10,714.2**	**11,439.2**	**11,611.5**	**172.3**	**1.5**

Source: ITC Trade Map

Export structure of South African agricultural products to other countries in value terms, 2023, %



Source: ITC Trade Map

Among the BRICS countries the largest importers of agricultural products from South Africa were China (4.3% of export in value terms), the UAE (3.8%), Russia (1.8%) and India (1.3%). The BRICS countries accounted for a total of 12.5% of South African agricultural export.

Also among the major importing countries in 2023 were the Netherlands (9.8% of export in value terms), the UK (6.7%) and Botswana (5.9%). In total the top 10 importing countries accounted for 53.4% of South African agricultural export in 2023.

The main importing countries of agricultural products from South Africa in value terms, 2018–2023, million US dollars

№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	China	410.0	406.2	423.6	780.3	555.6	572.5	16.8	3.0
2	UAE	263.1	280.0	329.7	379.1	449.3	499.8	50.5	11.2
3	Russia	216.0	183.3	245.6	255.6	252.0	245.2	-6.9	-2.7
4	India	52.8	88.0	59.4	87.4	102.2	169.4	67.3	65.8
5	Saudi Arabia	135.0	147.9	139.8	157.6	147.7	135.5	-12.2	-8.2
6	Ethiopia	61.9	29.4	13.0	10.2	9.8	12.0	2.2	22.5
7	Brazil	12.1	9.8	8.6	10.2	12.1	11.9	-0.2	-1.9
8	Egypt	7.3	5.9	6.8	8.7	11.6	10.2	-1.4	-12.1
9	Iran	2.8	1.4	0.8	0.9	1.5	2.2	0.8	51.5
	Total BRICS	**1,161.0**	**1,151.9**	**1,227.2**	**1,690.0**	**1,541.8**	**1,658.8**	**116.9**	**7.6**
1	Netherlands	958.4	839.5	1,048.8	1,270.2	1,310.2	1,305.9	-4.4	-0.3
2	United Kingdom	848.5	744.2	810.5	909.6	851.8	883.2	31.4	3.7
3	Botswana	685.6	744.4	636.7	775.7	777.7	788.9	11.2	1.4
4	Namibia	689.1	699.9	591.9	713.0	737.7	730.1	-7.6	-1.0
5	Mozambique	537.6	569.8	526.7	561.6	641.8	717.2	75.4	11.8
6	Zimbabwe	245.1	194.2	444.7	473.5	521.3	651.4	130.0	24.9
7	USA	377.2	381.3	401.4	574.3	567.6	538.6	-29.0	-5.1
8	Lesotho	369.5	382.1	352.5	427.0	448.4	392.9	-55.5	-12.4
9	Eswatini	305.0	305.1	294.0	356.6	376.3	371.4	-4.9	-1.3
10	Zambia	292.6	262.0	228.4	298.1	338.5	353.1	14.7	4.3
	Other countries	4,184.6	3,652.2	3,784.6	4,354.5	4,867.9	4,878.9	10.9	0.2
	Total non-BRICS	**9,493.2**	**8,774.6**	**9,120.3**	**10,714.2**	**11,439.2**	**11,611.5**	**172.3**	**1.5**
	Total	**10,654.2**	**9,926.5**	**10,347.5**	**12,404.2**	**12,981.0**	**13,270.3**	**289.2**	**2.2**

Source: ITC Trade Map

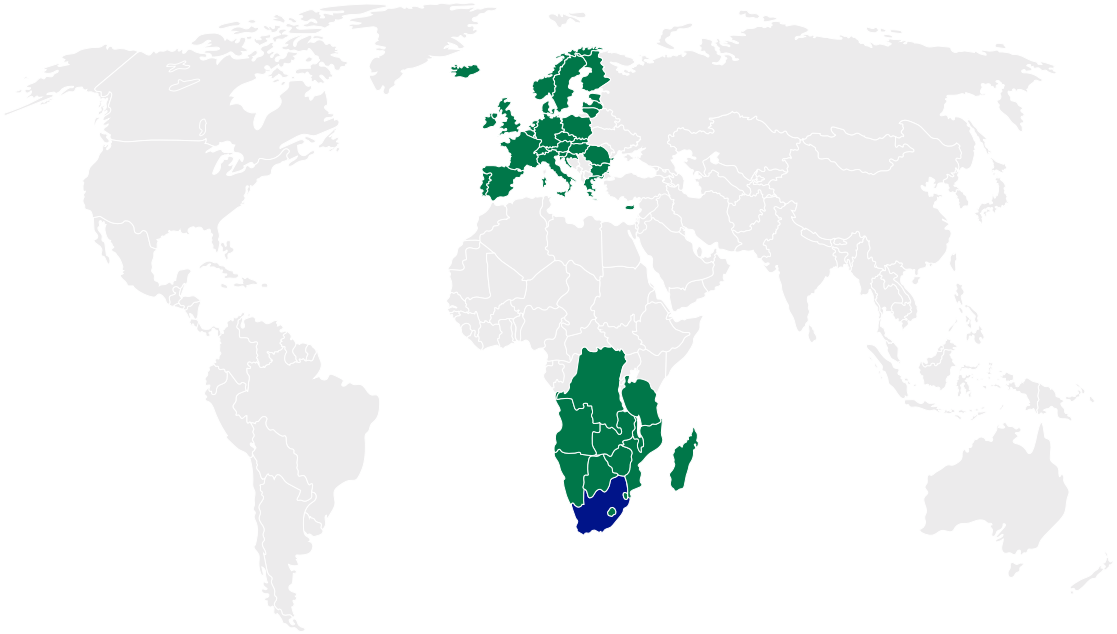
2.5.3.3. International cooperation

South Africa is a member state of the Southern African Customs Union (SACU), which also includes Namibia, Botswana, Lesotho and Eswatini. To date the countries/ regional associations with which the union has signed free trade agreements are:

- European Free Trade Association (Iceland, Liechtenstein, Norway, Switzerland);
- European Union (Austria, Belgium, Bulgaria, Hungary, Germany, Greece, Denmark, Ireland, Spain, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Finland, France, Croatia, Czech Republic, Sweden, Estonia);
- United Kingdom;
- Mozambique.

South Africa is also a member of the free trade area of the Southern African Development Community (SADC, unites 16 states (Angola, Botswana, Comoros, Zambia, Zimbabwe, DR Congo, Lesotho, Mauritius, Madagascar, Malawi, Mozambique, Namibia, Eswatini, Seychelles, Tanzania, South Africa)).

South Africa trade agreements



State/association with which South Africa has entered into a preferential trade agreement	Effective date of the agreement
European Union: Austria, Belgium, Bulgaria, Hungary, Germany, Greece, Denmark, Ireland, Spain, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Finland, France, Croatia, Czech Republic, Sweden, Estonia	2000
Southern African Customs Union: South Africa, Namibia, Botswana, Lesotho, Eswatini	2004
Southern African Development Community: Angola, Botswana, Comoros, Zambia, Zimbabwe, Democratic Republic of the Congo, Lesotho, Mauritius, Madagascar, Malawi, Mozambique, Namibia, Eswatini, Seychelles, Tanzania, South Africa	2004
EFTA: Iceland, Liechtenstein, Norway, Switzerland (within the South African Customs Union)	2008
UK and Mozambique (within the South African Customs Union)	2021

2.5.3.4. Special economic zones

In South Africa special economic zones (SEZs) have been operating for more than 20 years. The legal and regulatory framework for SEZs consists of the Special Economic Zone Act 16 of 2014 and the Industrial Policy Action Plan, which define SEZs as “key factors of economic development” and “drivers of growth for achieving the government's strategic goals of industrialization, regional development and job creation”.

Most of the SEZs in the country are located in the areas of airports and seaports. About half of them are industrial development zones (IDZs) — industrial zones created specifically to attract investment in the export-oriented manufacturing of products and services with high added value.

Among the SEZs, IDZs worth noting are Coega (the very first SEZ in the country, which accounts for more than half of the total private investment in the SEZs of South Africa), Maluti-a-Phofung, Richards Bay, East London, Saldanha Bay and Dube Commercial Port, Atlantis SEZ.

The following benefits are provided for investors in the South African SEZ:

- preferential income tax rate of 15% (versus the regular rate of 28%);
- preferential income tax rate (Employment Tax Incentive) regardless of the employee’s age (outside the SEZ, a preferential rate is provided only when hiring younger employees);
- benefits for VAT payment and customs duties within the customs territory of the SEZ, etc.

2.5.3.5. Institutes for supporting the export of agricultural products

Brand South Africa

Description	Government Marketing Agency of South Africa. Founded in 2002 with the aim of creating and developing a national brand for South Africa. The agency's goal is to develop and implement marketing and communication strategies to promote products under a national brand. In addition to developing the export of South African products, the agency's task is to promote the image of South Africa as an attractive destination for investment, education and tourism
Main goals	• strategizing a plan for the development of a national umbrella brand; • development and implementation of national initiatives to promote national products in foreign markets; • raising awareness of South African products in foreign markets through exhibition events; • provide research to improve the competitiveness and image of national products; • conducting educational events for local exporting companies
Contact details	**Address:** 103 Central Street Houghton, Johannesburg **Tel.:** +27 011 483 0122; +27 011 483 0124 **E-mail:** info@brandsouthafrica.com **Website:** https://brandsouthafrica.com/

Export Credit Insurance Corporation of South Africa Soc. Ltd.

Description	The Export Credit Insurance Corporation of South Africa Soc. Ltd. was founded in 2001 to provide political and commercial risk insurance to South African exporters of goods and related services. It is an institution under the jurisdiction of the South African Department of Trade, Industry and Competition. The corporation's main activities cover the export of South African companies to developing countries on the continent, including Ghana, Zimbabwe, Ethiopia, Mozambique and other countries
Main goals	• export credit insurance for South African companies; • insurance for investments of South African investors in foreign enterprises; • insurance and maintenance of small (up to 10 million US dollars) and medium (up to 20 million US dollars) transactions; • performance guarantee insurance for export contracts
Contact details	**Address:** Bylsbridge Boulevard Office Park Building 9, Fourth Floor, 11 Byls Bridge Boulevard, Highveld Extension 73, Centurion **Tel.:** +27 012 471 3800 **E-mail:** info@ecic.co.za **Website:** https://www.ecic.co.za/

Expert opinion

Hassan Anis

Managing director, Buena Vista Group

Egypt is a large consumer market with a population of over 100 million. BRICS accession will strengthen cooperation with the world's strongest economies, which will ultimately affect the purchasing power of local residents. There is a steady demand for agricultural products in the Egyptian market, so the expansion of BRICS will help to meet current needs and attract more stakeholders interested in co-operation. All this can be expected to lead to trade liberalization and, consequently, to easing of tariff restrictions.

So far, we are ready to propose a number of initiatives that will facilitate the development of trade in agro-industrial products within the association. These include building of grain storage facilities outside the main ports, shaping a financial system that would allow unimpeded trade in agricultural commodities. Establishment of harmonized simplified system for the movement of goods would avoid delays at customs. In addition, we can take advantage of Egypt's local climate and human resources to grow organic products and promote it in the BRICS markets. Another initiative could be the establishment of institutions which provide farmers with modern scientific knowledge.

The accession of East and West African countries to BRICS would contribute to the enrichment of the association's resource potential.

2.6. Egypt

2.6.1. Social and economic profile

The Arab Republic of Egypt (Egypt) is located in North Africa and the Sinai Peninsula of Asia. It is the largest Arab country with a population of over 100 million people. Most of them live in the Nile River Valley, where fertile land is found. Almost all of the rest of the country is covered by sparsely populated desert.

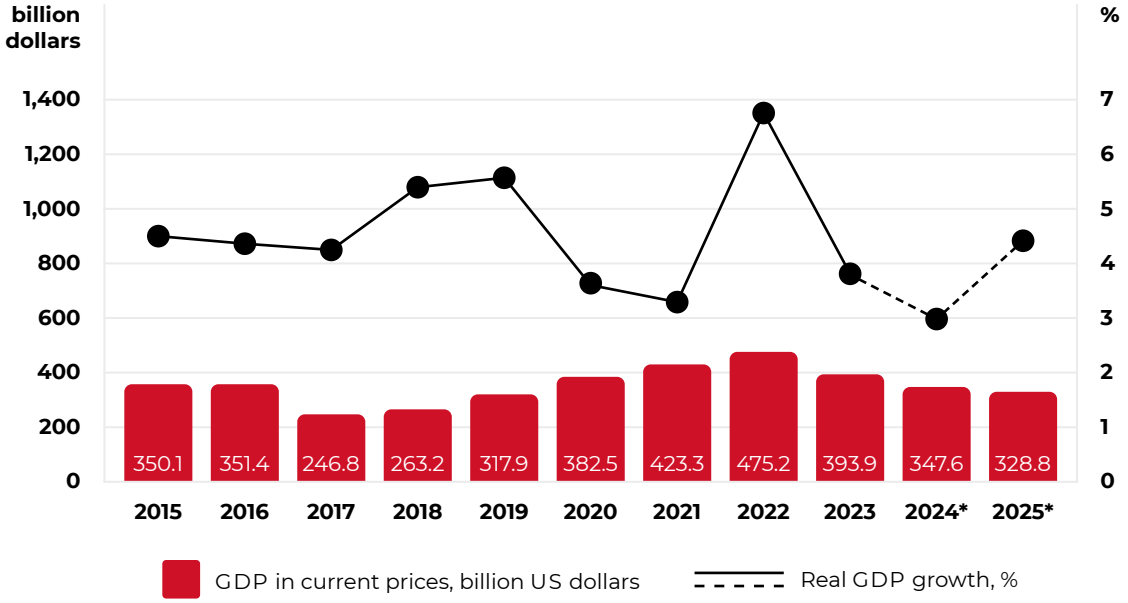
The country covers an area of 1.0 million km^2, including 40,300 km^2 of land suitable for agriculture. The coastline is about 2.9 thousand kilometers. The length of Egypt's land border is 2.7 thousand km, the country borders with 4 states. The urbanization rate in 2022 reached the mark of 43.0%.

Throughout 2017-2022 Egypt maintained its position as the top recipient of FDI in Africa. FDI inflows into the country increased 2.2 times to 11.4 billion US dollars in 2022 compared to 5.1 billion US dollars in 2021.

Agriculture accounts for 10.9% of Egypt's GDP by PPP, while the industrial and services sectors account for 32.7% and 51.4%, respectively. Agriculture employs about 18.7% of the population, industry 28.4%, and services 53.0%. Egypt's unemployment rate stood at 6.3% as of 2023.

Despite the slowdown the country managed to avoid recession during the pandemic, with real GDP growth of 3.6% in 2020. In 2021 a further increase in private consumption combined with a recovery in investment and export ensured that the positive momentum continued, although GDP growth slowed to 3.3% overall. In 2022 Egypt's GDP growth accelerated to 6.7%, above the MENA average, despite a slowdown in the global economy due to geopolitical instability. However, the country's currency crisis resumed in 2023, accompanied by a rapid and uncontrolled rise in inflation, and the real GDP growth rate stood at 3.8%.

Dynamics of Egyptian GDP in current prices, 2015-2025



Source: IMF

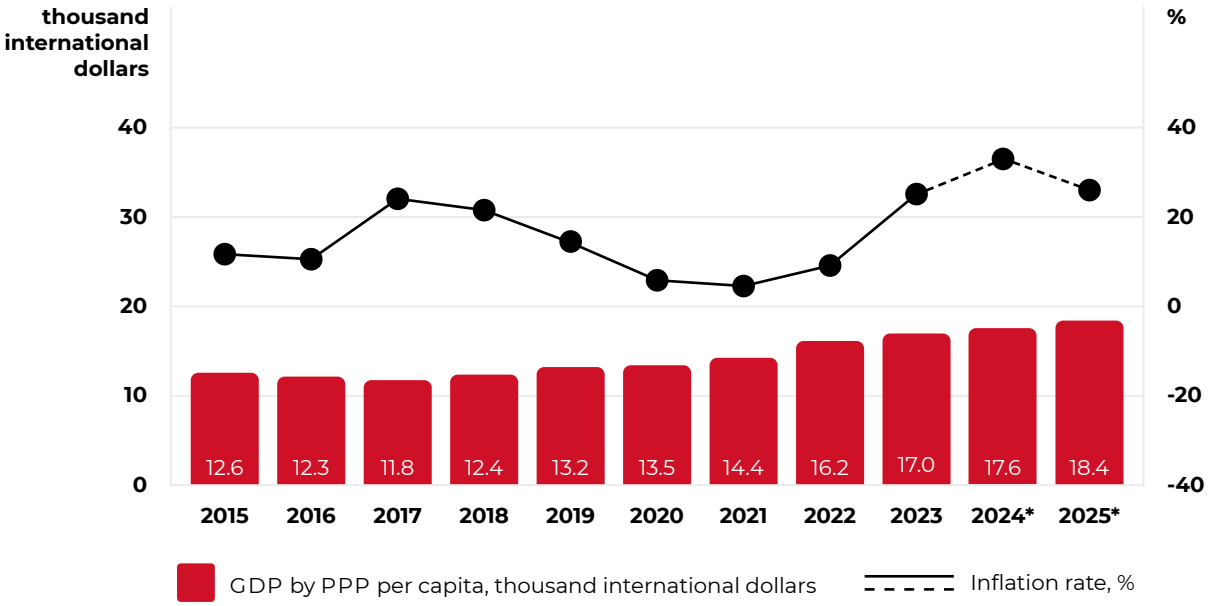
*Note. *forecast, IMF data as of April 16, 2024.*

The economic situation was exacerbated by heightened geopolitical tensions, a slowing global economy, rising food inflation and tighter monetary policy in most countries of the world. In accordance with IMF recommendations, Egypt devalued the national currency in several stages, resulting in a halving of the Egyptian pound exchange rate by early 2024 relative to early 2022.

The devaluation of the national currency, carried out in order to attract foreign financing, led to a significant increase in the inflation rate and another serious economic crisis. In 2022 the inflation rate in annual terms amounted to 8.5%, in 2023 — 24.4% with the highest value of the indicator reached in August, 2023 when price growth amounted to almost 38%.

At the end of 2023 the inflation rate began to gradually decline. However, on February 1, 2024 the Central Bank of Egypt announced an increase in the key rate by 200 bps to 21.25% (a total of 1,200 bps from March, 2022). The decision was made against the backdrop of persistent pro-inflationary risks associated with the disruption of navigation in the Red Sea and armed conflicts in neighboring countries. These circumstances negatively affect tourism in Egypt and revenues from international trade through the Suez Canal.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

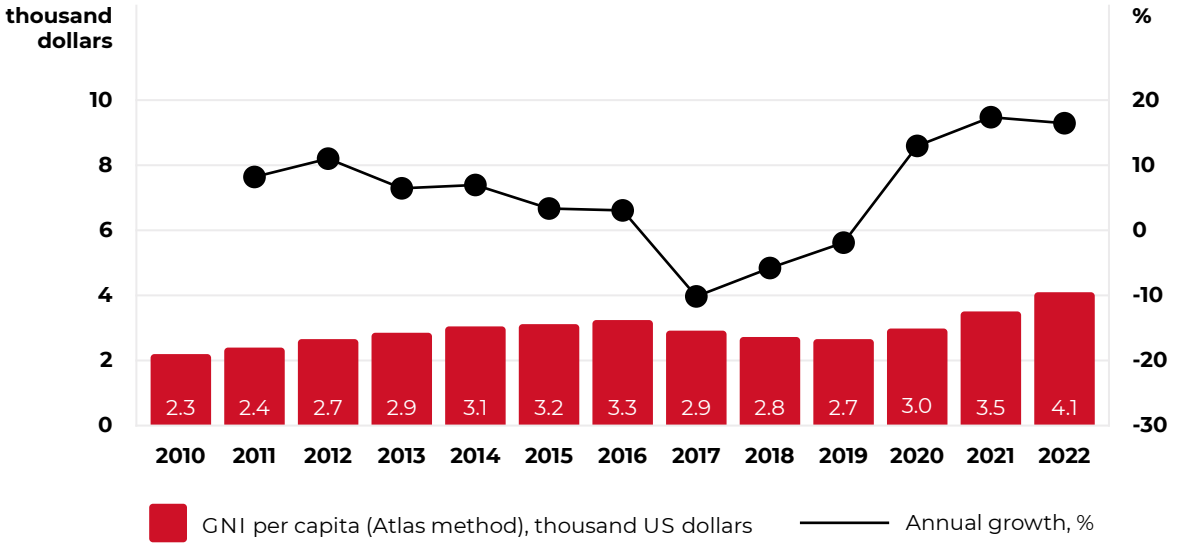


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, Egypt belongs to the group of lower-middle income countries. In 2022 the GNI per capita was 4.1 thousand US dollars. Egypt is currently at the upper end of the lower-middle income category and may move into the upper-middle income group in the medium term if current growth rates continue.

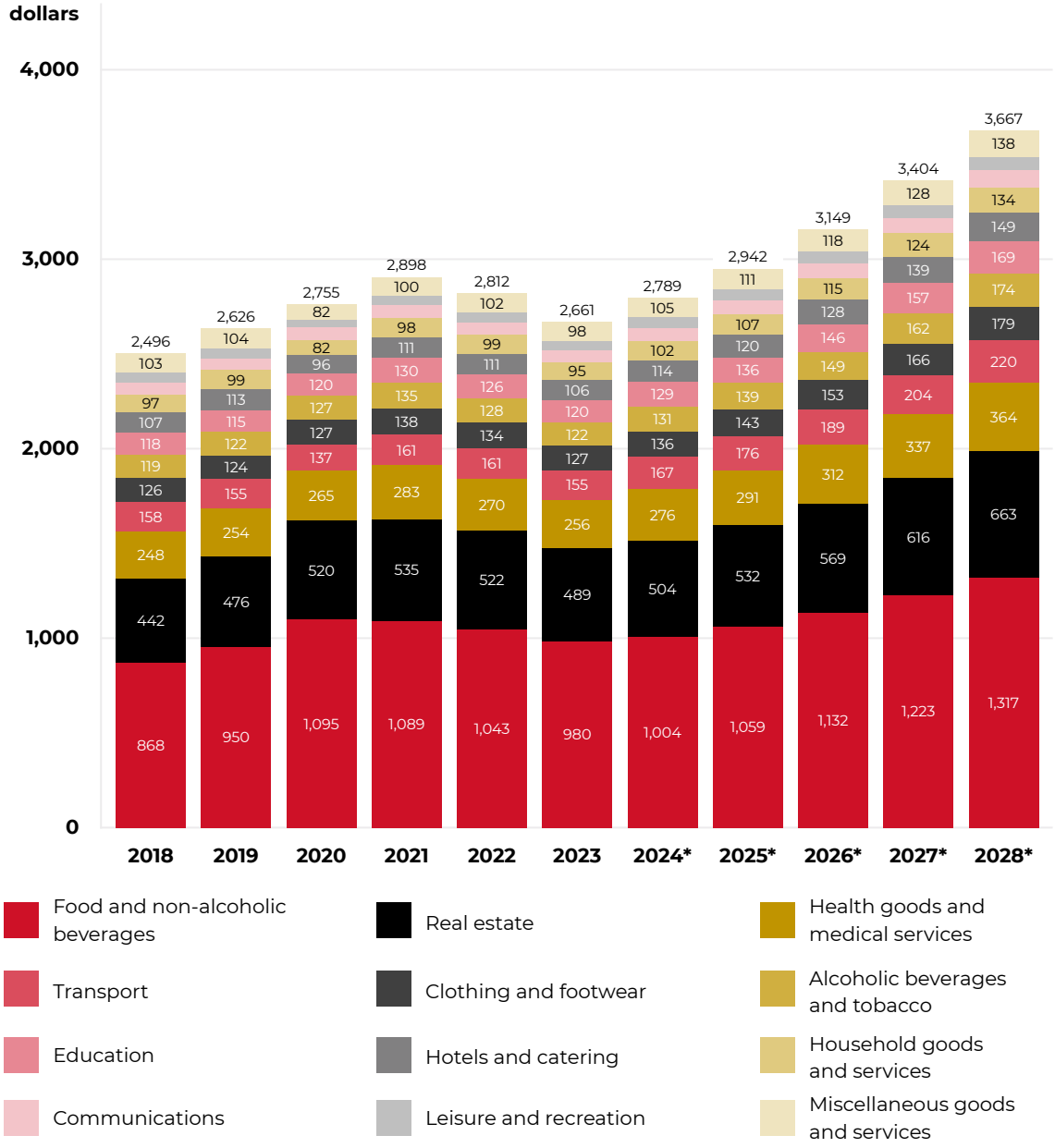
Dynamics of GNI per capita in Egypt, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 amounted to 2,661 US dollars in constant 2023 prices, which is 5.4% below that of 2022. Most of the expenditures were on food and non-alcoholic beverages — about 36.8%. Real estate (18.4%) and health goods and medical services (9.6%) also accounted for a significant amount of spending. In 2028 final consumption expenditures per capita are projected to reach 3,667 US dollars, of which food and non-alcoholic beverages will account for 1,317 US dollars (35.9%).

Final consumption expenditures in Egypt per capita in constant prices 2023, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.6.2. Agriculture

2.6.2.1. Crop and livestock production

Most of the agricultural production takes place in the fertile valley and delta of the Nile River while the rest of the country's territory is not suitable for crop production and requires additional measures to green the deserts. The climatic peculiarities of the country also determine the high water demand of Egyptian farmers. Irrigation systems are being developed in the country for these needs. The agricultural sector consumes most of Egypt's water resources and the government is focusing on projects such as desalination and water treatment plants.

Egypt is a major crop producer. In 2022 the country produced 23.9 million tons of cereals, 21.2 million tons of vegetables, roots and tubers and 14.1 million tons of fruits and berries. Sugarcane and sugar beet occupy an important place in the country's agricultural production structure with production of 16.0 million tons and 13.6 million tons respectively in 2022. The sugar market situation directly affects the income of millions of people in the southern part of the country, the main sugarcane and sugar beet growing area.

Among cereals wheat is the most widespread with a production of 9.6 million tons in 2022. This crop is highly important for the country's food security but domestic production does not meet the demand and Egypt has to import large amounts of wheat. In order to increase the level of self-sufficiency the government is implementing measures to stimulate production, in particular, by increasing the purchase price of wheat to replenish the intervention fund. The second most important cereal crop is corn with production of 7.4 million tons in 2022. Rice is also produced in the country (about 4.3 million tons in 2022) but its production is under state control due to high water consumption. At the same time rice cultivation in the Nile Delta allows controlling the level of saline water inflow from the Mediterranean Sea and prevents soil salinization.

Egypt is a major producer of fruits and vegetables. In the product group of vegetables, roots and tubers, the most common crops are tomatoes (6.3 million tons in 2022), potatoes (6.2 million tons), onions and shallots (3.7 million tons). Orange is not only the most widely grown fruit in the country but also leads Egypt's agricultural export. In 2022 Egypt produced 3.4 million tons of oranges. In addition the country is the world's largest producer of dates — in 2022 their production amounted to 1.7 million tons. Egypt also produces grapes (1.6 million tons).

Production of crop products, million tons

	2018	2019	2020	2021	2022
Cereals	**17.6**	**21.9**	**22.5**	**23.1**	**23.9**
Wheat	8.3	8.6	9.1	9.8	9.6
Corn	6.8	6.4	6.4	7.4	7.4
Rice	3.1	4.8	4.4	4.2	4.3
Vegetables, roots and tubers	**19.7**	**19.7**	**21.0**	**21.5**	**21.2**
Tomatoes	6.8	6.8	6.5	6.4	6.3
Potato	5.0	5.2	6.8	6.3	6.2
Onions and shallots (dried)	3.1	3.1	3.2	3.6	3.7
Fruits and berries	**14.7**	**14.6**	**15.1**	**13.9**	**14.1**
Oranges	3.1	3.1	4.0	3.2	3.4
Dates	1.6	1.6	1.7	1.7	1.7
Grape	1.6	1.6	1.2	1.5	1.6
Sugar cane	**15.8**	**15.3**	**15.9**	**16.0**	**16.0**
Sugar beet	**10.4**	**12.2**	**10.3**	**14.2**	**13.6**

Source: FAOSTAT, USDA, CAPMAS

Egypt has developed both dairy and meat animal husbandry but the production of ready-to-eat products does not fully meet the needs of the domestic market. The country is still a net importer of meat, dairy products and seafood. Moreover, Egypt has to purchase animal feed from other countries the prices of which are subject to high volatility.

Milk production in 2022 amounted to 5.7 million tons including cow's milk (75.9%) and buffalo milk (22.3%). Also the needs of the domestic market in dairy products are partially met by import of milk powder. The most developed livestock sector in Egypt is poultry. In 2022 poultry meat production amounted to about 2.5 million tons. Consumption of other types of meat, including cattle meat, is provided mainly by import.

Egypt produces about 2 million tons of fish and seafood annually. The majority comes from the country's developed aquaculture sector, which is the largest on the African continent.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	10.10	13.50	15.06	16.36	15.35
Milk, million tons	5.2	5.3	5.6	6.2	5.7
Poultry meat, million tons	1.3	1.5	2.0	2.4	2.5
Fish and seafood, million tons	2.0	2.0	2.0	2.0	2.1*

Source: FAOSTAT, USDA, CAPMAS
*Note. * estimated.*

2.6.2.2. Overview of milestones in the agro-industrial complex

1945 Foreign policy

Membership of the Arab League, one of the largest international organisations in terms of population and GDP.

1945 Foreign policy

Membership of the International Monetary Fund (IMF) and the International Bank for Reconstruction and Development (IBRD).

1952 Domestic policy

Start of the land reform in Egypt (Law No. 178/1952) which limited the maximum size of land holdings, set a marginal rate on land rents and a minimum wage for peasants and established the country's first agricultural cooperatives. The reform created a class of farmers and accelerated urbanization in Egypt.

1963 Foreign policy

Membership of the African Union, an intergovernmental organization of 55 African states.

1966 Domestic policy

Adoption of the basic law on agriculture (No. 53/1966). The document defined the powers of the Ministry of Agriculture (including the organization of crop rotation and irrigation, as well as the regulation of import and export of live animals) and its structural subdivisions, streamlined the process of registration of varieties and hybrids of agricultural plants, formulated the rules of trade in fertilizers and the basis of state policy on animal disease control.

1968 New institutions

The General Authority For Supply Commodities (GASC) is established under the auspices of the Egyptian Ministry of Supply and Internal Trade to provide the country with basic foodstuffs (the list now includes wheat, sugar, vegetable oil and tea) through tenders.

1969 Foreign policy

Membership of the Organization of Islamic Cooperation (OIC).

1970 Foreign policy

Accession to the General Agreement on Tariffs and Trade (GATT).

1970 Foreign policy

Foundation of the Arab Organization for Agricultural Development (AOAD) under the auspices of the League of Arab States to promote agricultural development in member countries and to coordinate this process at the supranational level.

1971 Industry development

Putting into service of the Aswan High Dam on the Nile River. Designed by engineers from Moscow's Gidroenergoproekt Institute, the dam provided Egypt with affordable electricity and water for irrigation, regulated the flow of the Nile, and maintained high crop yields by preventing floods and droughts. The dam also facilitated navigation on the Nile, leading to the increase in Egypt's tourism revenues and fishing productivity.

1975 Foreign policy

Membership of the World Intellectual Property Organization (WIPO).

1977 Foreign policy

Membership of the International Fund for Agricultural Development (IFAD).

1987 Industry development

Start of agrarian reform, which involved liberalization of Egypt's agribusiness sector. The reform abolished forced crop rotation and compulsory government purchases of all field crops except cotton, sugarcane and rice, and deregulated the market for fruits, vegetables and livestock products. The government gradually eliminated a number of subsidies, started privatization of the state-owned firms, made significant efforts to attract private investment in agro-industrial technology, and loosened the rules on land allocation for horticulture and cattle breeding.

1988 Foreign policy

Membership of the Multilateral Investment Guarantee Agency (MIGA).

1991 Domestic policy

Launch of the program of large-scale economic reforms developed jointly with the IMF and the World Bank. The program included redistribution of budget expenditures, liberalization of the foreign exchange market and supportive monetary policy measures. As part of the reforms, quantitative restrictions on imports of agricultural products were lifted, tariff rates on most imported goods were reduced, imports of a number of previously banned commodity groups were allowed and the customs procedure for exports was simplified. The reforms have generally encouraged the private sector to play a more active role in agricultural trade.

1995 Foreign policy

Membership of the World Trade Organization (WTO).

1996 Domestic policy

Continuation of the reform program following Egypt's accession to the WTO: elimination of non-tariff restrictions on exports and active privatization of state-owned companies, including in the agricultural sector.

1997 Companies

Establishment of Obour Land Company, currently Egypt's largest producer of soft cheese and dairy products in general.

2001 Foreign policy

Adoption of the African Union's New Partnership for Africa's Development (NEPAD) economic development program, which has as one of its main objectives the development of agriculture in the member countries of the organization.

2009 Development plan

Adoption of Egypt's Sustainable Agricultural Development Strategy 2030 (SADS 2030) which main objectives are to modernize the country's agricultural sector, ensure food security and improve the quality of life of the rural population.

2016 Development plan

Publication of Egypt Vision 2030, the state's strategic plan to achieve sustainable development goals in all areas of society, including agriculture.

2017 New institutions

Establishment of the National Food Safety Authority (NFSA).

2023 Industry development

Signing of an agreement between Elsewedy Electric and MAFI (For Agricultural Production Industries) for the latter to transfer 154,000 km^2 of land in Madinat al-Sadat for the establishment of the Middle East's largest agricultural cluster. The complex will include two of Egypt's largest plants for the production of essential oils, fruit and vegetable concentrates, as well as one of the world's largest freeze drying plants. The total planned investment in the project is 300 million US dollars. The projected capacity at the initial stage is 100,000 tons of products annually, with more than 80% of the output to be exported. The cluster is expected to create more than 7 thousand jobs. Foreign companies manufacturing equipment for the food industry are actively involved in the project: the American John Bean Technologies Corporation, the Danish Cabinplant and the German GEA.

2024 Industry development

The Ministry of Water Resources and Irrigation of the Arab Republic of Egypt announced plans to provide more than 25,000 hectares of agricultural land with deep drainage systems in 2024. These engineering structures stabilize groundwater levels, which improves soil properties and slows down the process of soil salinization, increasing fertility. The Ministry noted that over the past few years, more than 2.5 million hectares of agricultural land in Egypt have been equipped with such systems within the framework of public-private partnership.

2.6.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

The Egyptian government aims to increase self-sufficiency in agricultural products. Currently, the country fully satisfies domestic demand for many types of fruits and vegetables. Provision of wheat, corn, pulses, vegetable oils and meat remain insufficient.

Agricultural development has been stimulated by several national projects that have developed 1.5 million acres (600,000 hectares) of land in eight governorates in Upper Egypt and Sinai, expanded the capacity of public grain elevators from 1.4 to 5.5 million tons, established 100,000 greenhouses, organized seed production and new crop varieties, expanded fertilizer production capacity and subsidized agricultural producers.

Sustainable development of agriculture

At the end of 2020 Egypt launched a 50 billion US dollars water management strategy until 2050. It includes several major projects to develop the agricultural and irrigation sectors, including a national canal rehabilitation project, a project to transition from flood irrigation systems to modern irrigation, as well as programs for climate change adaptation, sea level rise protection and rain harvesting projects.

E-commerce development

Thanks to the government's efforts to introduce digital payments the growing proportion of the population with internet access and the increasing number of smartphone users, the share of online sales in total retail sales is gradually increasing. Egyptian consumers' trust in online shopping platforms is growing, which encourages companies to expand their market presence and improve their delivery infrastructure. Although retailers continue to accept cash on delivery, many companies are encouraging consumers to switch to cashless payments as they are more convenient and secure.

The main factor holding back the development of the e-commerce channel in Egypt is the poor quality of services provided. The government continues to invest in infrastructure development, which is expected to have a positive impact on online commerce volumes in the medium term. Also given the continuing problems with the delivery of goods in the e-commerce channel, there has been an increase in the number of companies providing a full range of logistics services.

Development of the “Blue Economy” — fish and seafood

Egypt's aquaculture industry is growing rapidly. The country is the leader in aquaculture production in Africa and one of the largest producers of tilapia in the world. There are major aquaculture projects underway in several Egyptian governorates. The largest aquaculture project is being implemented in Kafr El Sheikh governorate. The complex includes not only ponds for growing fish and seafood but also hatcheries for the production of fry, facilities for feed production, product processing and packaging. The project implements measures to clean water resources from pollution, develop energy and transportation infrastructure, improve social conditions for the local population and develop research capabilities.

2.6.2.4. Key agricultural producers

The largest agricultural holdings in Egypt[9]

Juhayna Food Industries

Activities	Production, processing, distribution, import, export
Industry	Dairy, non-alcoholic beverages
Description	A leading producer of dairy products and non-alcoholic beverages in Egypt. The company was founded in 1983, the structure includes production facilities Juhayna Food Industries, International Company for Modern Food Industries, Egyptian Food Industries, El Masreya for Dairy Products, Tiba for Trading and Distribution, fruit and vegetable processor El Marwa Food Industries and a farm Al Enmaa for agriculture development & livestock. The land bank of the holding exceeds 2 thousand hectares, the number of cattle — 7 thousand. The company cooperates with 110 farms to ensure the raw material base. Juhayna Food Industries' product range includes whole and UHT milk, yogurts, dairy drinks, juices and dairy alternatives. For 2023 the company's revenue amounted to 333 million US dollars
Contact Information	**Address:** Juhayna Headquarter, Polygon, Building No.2, Beverly Hills, Sheikh Zayed-Giza **Tel.:** +20 2 3850 8393 **E-mail:** contactus@juhayna.com **Website:** https://www.juhayna.com/

Edita Food Industries Company

Activities	Production, processing, distribution, export
Industry	Confectionery
Description	Manufacturer of confectionery products founded in 1996. Ranked among the leading companies in the industry in the Middle East and North Africa market. The company structure includes production facilities Edita Food Industries, Edita Confectionery Industries, Edita Frozen Food Industries, trading company Eidta for trade and distribution, foreign Edita Participation Cyprus Limited and Edita Food Industries Morocco. Edita Food Industries Company owns 7 factories, annual production volumes exceed 180 thousand tons. The export geography covers 17 foreign markets, the largest of which are the USA, Germany, Turkey and Saudi Arabia. The product range includes packaged croissants, chocolate rolls, cakes, muffins and other pastries, and sugary confectionery. For 2023 the company's revenue amounted to 252 million US dollars
Contact Information	**Address:** Edita Group Building, Plot 13 – Central Pivot, El Sheikh Zayed **Tel.:** +20 2 3851 6464 **Website:** https://edita.com.eg/

[9] According to the Fortune 500 Arabia rating: https://fortunearabia.com/en/Home/Fortune-500-Arabia

Delta Sugar

Activities	Production, distribution, export
Industry	Sugar
Description	Egypt's first national sugar producer. Founded in 1979. In 1981 the company launched a production line with a capacity of 100 thousand tons. Today Delta Sugar's production capacity is 350 thousand tons of sugar per year. The company produces crumbly and lump beet sugar and packs it from 1 kg to 50 kg. It also produces molasses. For 2023 the company's revenue amounted to 1.73 million US dollars
Contact Information	**Address:** Markaz Elkhadamat Street, 4th Quarter, Block 17 6th of October City, Giza, 12566 **Tel.:** +20 2 3830 8214 **E-mail:** headoffice@deltasugar.com **Website:** https://deltasugar.com/

Arabian Food Industries Company (Domty)

Activities	Production, processing, distribution, import, export
Industry	Dairy, confectionery, non-alcoholic beverages
Description	Food holding company was founded in 1990 as a cheese production company. Today it is the second producer of dairy products in Egypt, it operates 27 distribution centers throughout the country, the number of employees exceeds 2.6 thousand people. In addition to cheeses, the company's product range includes milk and milk drinks, juices and baked goods. The export geography includes 35 countries, including the countries of the Middle East and Africa, Europe and North America. For 2023 the company's revenue was 156 million US dollars
Contact Information	**Address:** 32C Murad Street - Giza, PO Box 245 Orman - Giza **Tel.:** +20 2 3572 4924 / 3572 2833 **E-mail:** domty@domty.org **Website:** https://www.domty.org/en/

Obour Land for Food Industries

Activities	Production, processing, distribution, import, export
Industry	Dairy, non-alcoholic beverages
Description	A cheese manufacturer, the company was founded in 1995 and today operates 17 production lines, as well as a packaging production facility. In addition 4 juice production and bottling lines were launched in 2018. The product range includes more than 100 SKU, including white and processed cheeses in packages from 80 to 500 g, as well as juices. For 2023 the company's revenue amounted to 150 million US dollars
Contact Information	**Address:** First industrial area, block 13012, El obour city, Qaliyubia Egypt **Tel.:** +20 12 7192 6667 **E-mail:** ir@obourland.com

Extracted Oils and Derivatives Co.

Activities	Production, processing, distribution, import, export
Industry	Oil and fat
Description	The edible oil manufacturing company was founded in 1959 in accordance with Presidential Decree No. 534. In 1998 it was transformed into a joint stock company. Extracted Oils and Derivatives Co. produces edible oils, animal feed, soap, washing powder and detergents. The range of edible oils includes sunflower, corn and cottonseed oil; the company also produces soybean meal and cottonseed meal. For 2023 the company's revenue amounted to 75.4 million US dollars
Contact Information	**Address:** 95C, Merghany St, Heliopolis, Cairo **Tel.:** +20 3381 4987 **E-mail:** chairman.ceo@extractedoils.com **Website:** https://www.extractedoils.com/website/index.php/en/

International Company for Agricultural Crops

Activities	Production, processing, distribution, export
Industry	Grain, legumes
Description	The company is a manufacturer, processor and trader of agricultural products and seed material. It was founded in 1981 in the Nile delta area. Since 1995 the company's shares have been traded on the stock exchange. International Company for Agricultural Crops operates in the production of agricultural seeds, trade and import of seeds and grains, packaging of fertilizers. The company operates two production sites, a screening laboratory, and a land bank of 76 thousand m^2 in an industrial zone in the province of Dakahlia. The product range includes corn, rice, wheat and their seeds, as well as complex fertilizers. For 2023, the company's revenue amounted to 48.7 million US dollars
Contact Information	**Address:** 79 El Guish St. Dakahlia, Nile Delta **Tel.:** +20 2 1223 989498 **E-mail:** mahaseel@mahaseel.com **Website:** https://mahaseel.com/

Middle & West Delta Flour Mills S.A.E.

Activities	Production, processing, distribution, export
Industry	Grain
Description	The company was founded in 1967. It processes grains and operates flour mills in the Nile Delta region. The range of products includes flour, pasta, bakery and flour confectionery products, as well as yeast and animal feed. For 2023 the company's revenue amounted to 38.9 million US dollars
Contact Information	**Address:** 19 El Galaa St, P.O. Box 202 Tanta, Nile Delta **Tel.:** +20 40329 4259 **E-mail:** deltamillscomputer@gmail.com

AJWA Group for Food Industries

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, grain, fruit and vegetable
Description	Food holding, founded in 1985. It operates in the following areas: production, processing and sale of edible oils and fats, trade in grains and production of animal feed, production of frozen vegetables and fruits. The company's main activities are in Egypt and KSA; AJWA Group also exports products to the countries of the Middle East and Africa. The product range includes sunflower, palm and corn oils, margarine, wheat, corn, barley, sorghum, rice, soybean meal, frozen fruits, vegetables and berries. AJWA Group also operates two grain terminals in Saudi Arabia. For 2023 the company's revenue amounted to 37.5 million US dollars
Contact Information	**Address:** 95C, Merghany St, Heliopolis, Cairo **Tel.:** +20 2 2417 8182 **E-mail:** info@ajwa.com **Website:** https://ajwa.com/

The Egyptian Holding Company for Silos & Storage

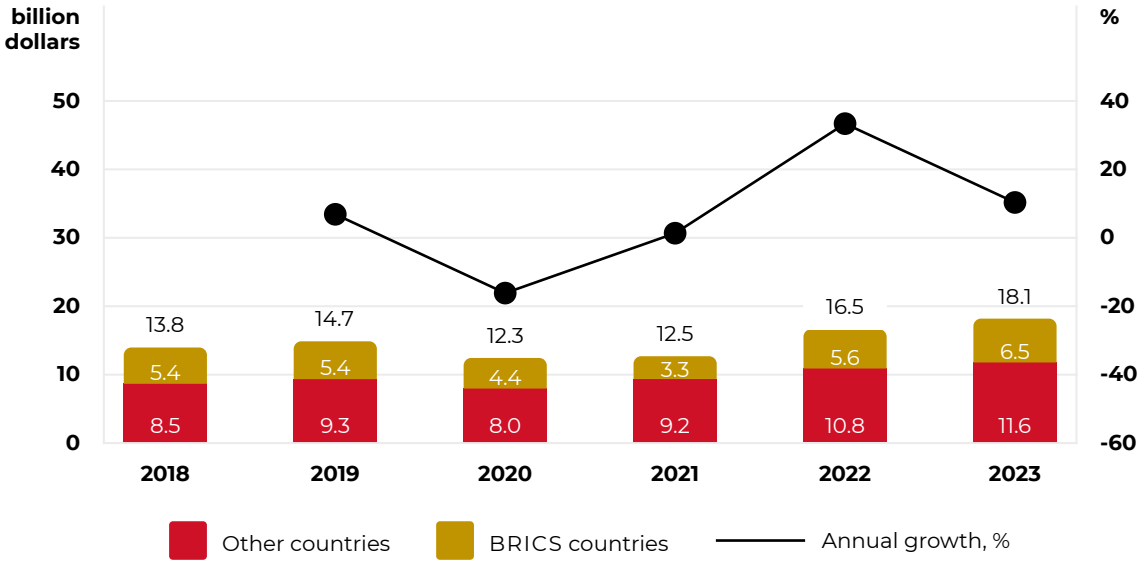
Activities	Procurement, storage, distribution
Industry	Grain, legumes
Description	The company was founded in 2002 in accordance with the decision of the Prime Minister No. 1682. It is a subordinate company of the Ministry of Supply and Internal Trade. The highest leader is the Minister of Supply and Internal Trade. The collegial governing body is the Board of Directors, consisting of 9 members and headed by a chairman. The holding structure includes The General Company for Silos & Storage and grain terminal operator company Egyptian ports silos. The holding's tasks include the creation and operation of elevators, the purchase and storage of wheat on the domestic market, the management of strategic grain reserves, as well as the optimization of logistics for this purpose. For 2023 the company's revenue amounted to 22.3 million US dollars
Contact Information	**Address:** 1, El-Sawah Square, 6th floor, Cairo **Tel.:** +20 2 2285 0914 **Website:** https://www.ehcss.com/

2.6.3. Foreign trade in agricultural products

2.6.3.1. Import of agricultural products

In 2023 Egypt's import of agro-industrial products amounted to 18.1 billion US dollars which is 9.9% (+1,627.5 million US dollars) above the 2022 level. In 2023 import from the BRICS countries increased by 14.6% (+826.4 million US dollars) compared to the previous year while import from other countries increased by 7.4% (+801.2 million US dollars). The volume of import of agricultural products for 2018-2023 increased by 5.5% per year on average.

Import of agricultural products of Egypt, 2018-2023, billion US dollars



Source: ITC Trade Map

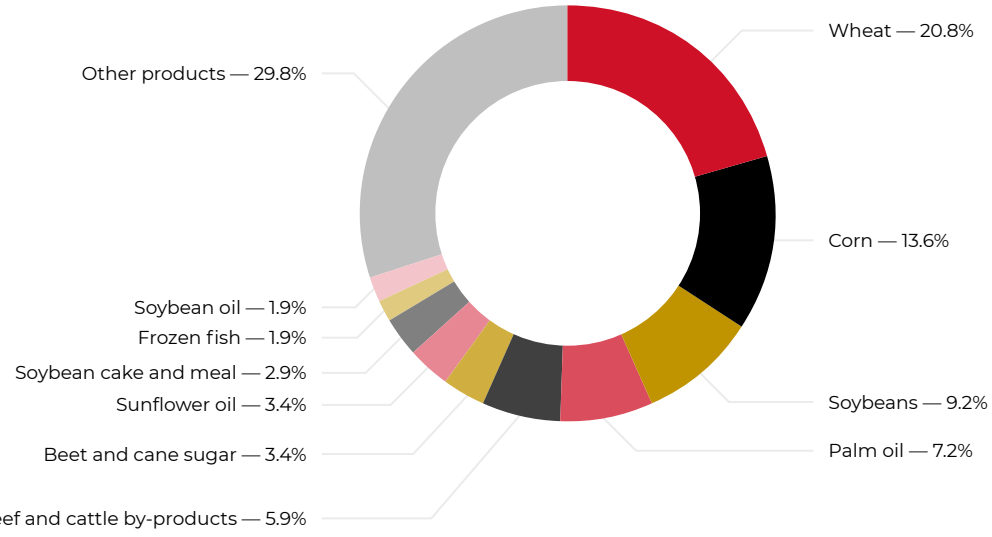
The structure of Egypt's agribusiness import in 2023 was dominated by wheat (20.8% of import), corn (13.6%), soybeans (9.2%), palm oil (7.2%) and beef and cattle by-products (5.9%). In total the top 10 commodity items accounted for 70.2% of Egypt's import of agro-industrial products in value terms.

Import structure of Egyptian agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	2,806.0	3,004.8	2,693.9	2,463.6	3,803.0	3,773.5	-29.5	-0.8
2	Corn	1,882.7	1,998.7	1,880.9	2,411.1	2,500.9	2,456.0	-44.9	-1.8
3	Soybeans	5.5	—	111.4	21.4	1,436.7	1,658.4	221.7	15.4
4	Palm oil	687.0	639.3	732.5	957.8	1,126.2	1,304.3	178.1	15.8
5	Beef and cattle by-products	1,592.0	1,898.4	1,609.9	1,106.2	1,214.7	1,071.3	-143.4	-11.8
6	Beet and cane sugar	565.3	343.7	34.6	108.0	190.1	624.3	434.3	3.3 times
7	Sunflower oil	391.3	258.4	81.9	134.7	157.4	617.6	460.2	3.9 times
8	Soybean cake and meal	243.0	74.5	13.5	0.3	95.1	518.8	423.7	5.5 times
9	Frozen fish	517.6	583.3	487.8	339.2	324.1	347.8	23.7	7.3
10	Soybean oil	125.5	174.9	27.4	53.3	81.1	341.0	259.9	4.2 times
	Other products	5,028.5	5,692.3	4,668.6	4,884.8	5,552.5	5,396.3	-156.2	-2.8
	Total	**13,844.5**	**14,668.2**	**12,342.3**	**12,480.3**	**16,481.7**	**18,109.3**	**1,627.5**	**9.9**

Source: ITC Trade Map

Import structure of Egyptian agricultural products in value terms, 2023, %



Source: ITC Trade Map

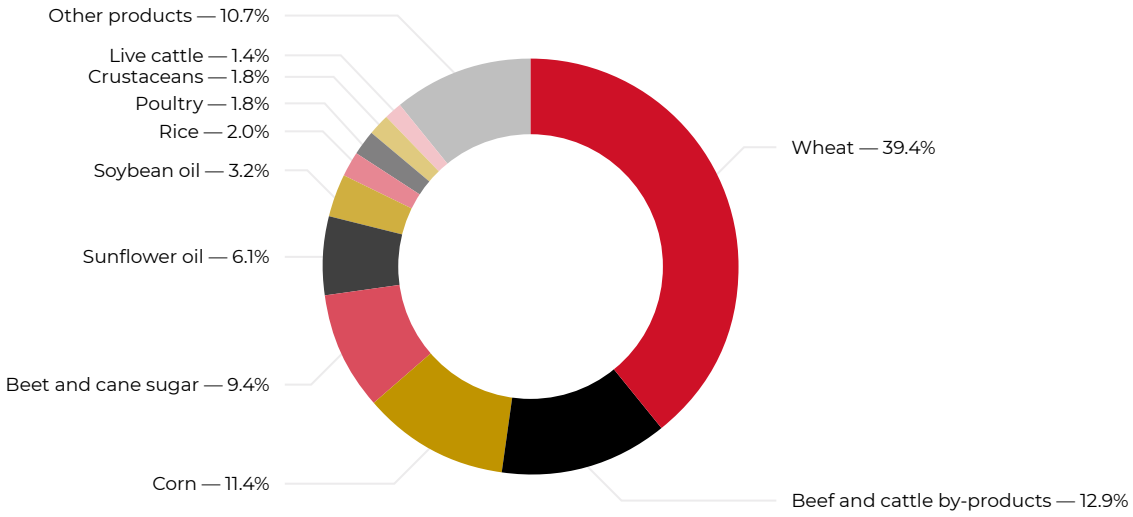
In 2023 wheat accounted for 39.4% of the value of Egypt's import of agricultural products from the BRICS countries. The top 5 imported agricultural products also included beef and cattle by-products (12.9%), corn (11.4%) and beet and cane sugar (9.4%).

Import structure of Egyptian agricultural products from the BRICS countries in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Wheat	2,066.8	1,448.5	1,626.7	1,027.1	1,992.1	2,545.1	553.0	27.8
2	Beef and cattle by-products	1,196.5	1,466.1	1,241.5	821.6	1,020.4	831.4	-189.0	-18.5
3	Corn	462.4	624.2	477.5	607.9	1,373.4	737.8	-635.6	-46.3
4	Beet and cane sugar	292.2	226.7	9.8	74.9	164.3	605.7	441.5	3.7 times
5	Sunflower oil	268.7	185.6	59.8	112.8	141.0	393.0	252.0	2.8 times
6	Soybean oil	—	0.2	0.1	0.2	17.6	206.7	189.1	12.0 times
7	Rice	55.8	256.5	41.4	45.5	93.3	131.1	37.8	40.5
8	Poultry	77.9	105.3	61.1	25.0	82.9	117.3	34.5	41.6
9	Crustaceans	133.0	166.4	148.3	122.6	143.4	116.5	-26.9	-18.8
10	Live cattle	63.2	72.2	51.6	—	33.9	93.6	59.7	2.8 times
	Other products	733.9	824.9	661.7	447.2	578.7	689.1	110.3	19.1
	Total	**5,350.4**	**5,376.5**	**4,379.6**	**3,284.8**	**5,641.0**	**6,467.4**	**826.4**	**14.6**

Source: ITC Trade Map

Import structure of Egyptian agricultural products from the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

The main positions in the import structure of Egyptian agricultural products from other countries in 2023 were corn (14.8% of import value), soybeans (13.5%), palm oil (11.1%) and wheat (10.6%).

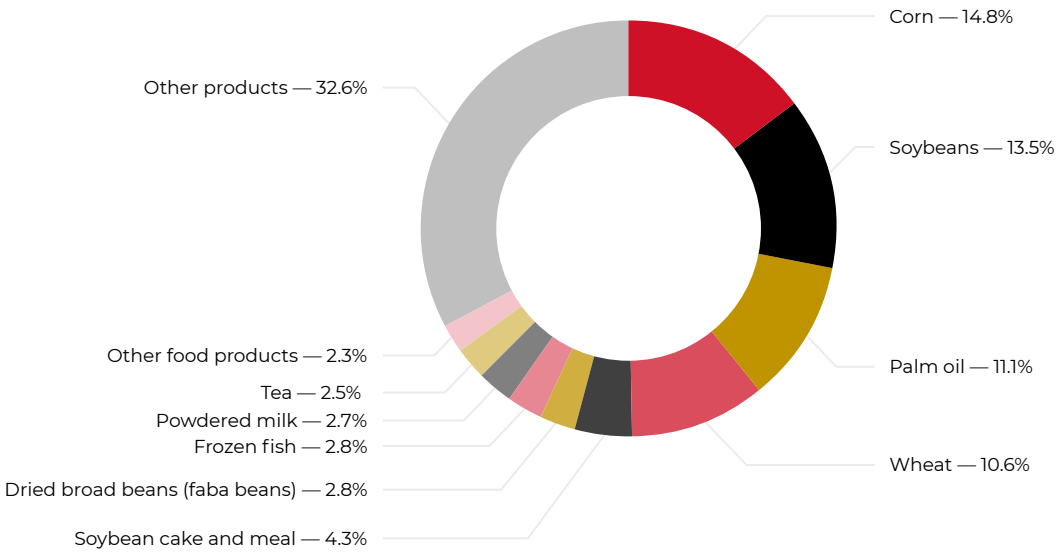
Import structure of Egyptian agricultural products from other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Corn	1,420.3	1,374.5	1,403.3	1,803.2	1,127.5	1,718.2	590.7	52.4
2	Soybeans	—	—	111.4	21.4	1,357.8	1,566.5	208.7	15.4
3	Palm oil	686.3	637.2	732.3	957.3	1,121.8	1,296.3	174.4	15.6
4	Wheat	739.2	1,556.4	1,067.1	1,436.5	1,810.9	1,228.4	-582.5	-32.2
5	Soybean cake and meal	243.0	74.5	13.5	0.3	85.2	495.6	410.4	5.8 times
6	Dried broad beans (faba beans)	258.5	297.1	242.4	227.5	286.5	330.9	44.5	15.5
7	Frozen fish	452.8	489.7	484.0	326.0	313.2	329.6	16.4	5.2
8	Powdered milk	231.6	274.4	244.4	258.3	335.7	316.9	-18.8	-5.6
9	Tea	281.1	251.0	184.1	210.8	257.6	296.5	38.9	15.1

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
10	Other food products	188.3	210.8	193.0	208.0	188.2	262.3	74.1	39.4
	Other products	3,993.1	4,126.2	3,287.1	3,746.2	3,956.3	3,800.7	-155.6	-3.9
	Total	**8,494.1**	**9,291.7**	**7,962.6**	**9,195.5**	**10,840.7**	**11,641.9**	**801.2**	**7.4**

Source: ITC Trade Map

Import structure of Egyptian agricultural products from other countries in value terms, 2023, %



Source: ITC Trade Map

In total the BRICS countries accounted for 37.5% of the structure of Egypt's agricultural products in 2023. The largest BRICS exporters of agricultural products to Egypt in 2023 were Russia (17.4% of import in value terms), Brazil (11.5%) and India (4.3%).

The main exporters of agricultural products to Egypt in 2023 were also Ukraine (12.3% of import in value terms), the USA (6.6%), Indonesia (6.2%) and Argentina (6.0%).

The main countries exporting agricultural products to Egypt in value terms, 2018-2023, million US dollars

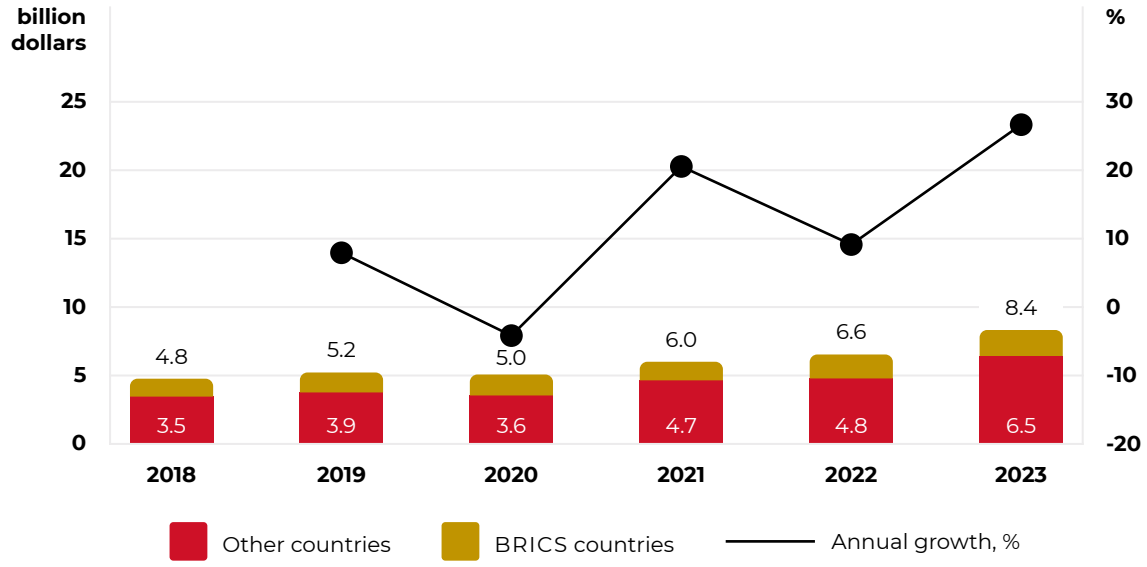
№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Russia	2,367.5	1,665.6	1,703.7	1,164.0	2,138.6	3,146.7	1,008.1	47.1
2	Brazil	2,101.4	2,145.4	1,390.0	985.4	2,252.6	2,081.3	-171.3	-7.6
3	India	357.0	760.0	814.2	734.6	840.3	786.2	-54.1	-6.4
4	UAE	168.1	211.6	184.9	146.9	182.0	181.8	-0.2	-0.1
5	China	289.7	500.5	206.5	164.7	146.4	146.2	-0.2	-0.2
6	Saudi Arabia	46.5	53.8	59.4	67.9	62.4	102.5	40.1	64.2
7	South Africa	8.6	8.8	8.0	9.1	11.2	11.3	0.1	1.0
8	Ethiopia	8.7	25.9	7.7	5.5	4.9	10.2	5.3	2.1 times
9	Iran	2.9	5.0	5.2	6.7	2.6	1.2	-1.4	-53.3
	Total BRICS	**5,350.4**	**5,376.5**	**4,379.6**	**3,284.8**	**5,641.0**	**6,467.4**	**826.4**	**14.6**
1	Ukraine	1,085.2	1,569.4	1,274.2	1,132.5	673.3	2,230.1	1,556.8	3.3 times
2	USA	1,002.8	877.4	674.8	525.0	1,539.1	1,199.3	-339.8	-22.1
3	Indonesia	790.0	787.5	770.0	904.4	902.7	1,119.2	216.5	24.0
4	Argentina	928.9	870.7	770.7	929.3	726.3	1,082.6	356.3	49.1
5	Romania	276.0	413.8	202.0	468.0	745.0	621.5	-123.5	-16.6
6	Malaysia	133.7	107.7	163.7	203.0	472.7	448.2	-24.5	-5.2
7	Australia	218.2	217.5	241.6	299.3	351.5	344.1	-7.5	-2.1
8	Kenya	272.7	243.1	184.5	187.2	257.1	302.0	44.9	17.5
9	France	279.9	424.8	336.5	226.6	795.3	282.6	-512.8	-64.5
10	Sudan	163.2	158.3	111.1	156.1	288.6	269.4	-19.2	-6.6
	Other countries	3,343.4	3,621.4	3,233.5	4,164.1	4,089.2	3,743.1	-346.1	-8.5
	Total non-BRICS	**8,494.1**	**9,291.7**	**7,962.6**	**9,195.5**	**10,840.7**	**11,641.9**	**801.2**	**7.4**
	Total	**13,844.5**	**14,668.2**	**12,342.3**	**12,480.3**	**16,481.7**	**18,109.3**	**1,627.5**	**9.9**

Source: ITC Trade Map

2.6.3.2. Export of agricultural products

Egypt's export of agricultural products in 2023 amounted to 8.4 billion US dollars which is 26.6% (+1,760.6 million US dollars) higher than the level of 2022. In 2023 export to the BRICS countries compared to the previous year increased by 4.3% (+77.4 million US dollars), export to other countries increased by 34.6% (+1,683.2 million US dollars). Over 2018-2023 Egyptian agricultural export increased at an average annual rate of 11.6%.

Export of agricultural products of Egypt, 2018–2023, billion US dollars



Source: ITC Trade Map

The main export products of Egypt's agro-industrial complex in 2023 were oranges (9.5%), strawberries and wild strawberries (5.6%), beet and cane sugar (5.2%) and potatoes (5.0%). In total the top 10 exported types of products accounted for 44.6% of Egypt's agricultural export by value.

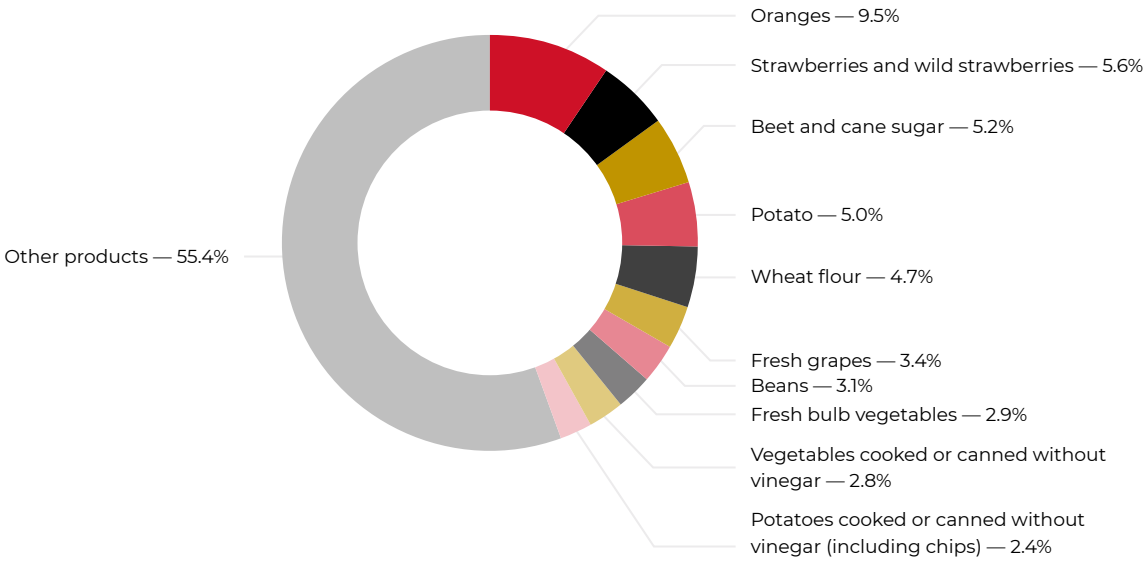
Export structure of Egyptian agricultural products in value terms, 2018-2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Oranges	666.7	661.7	648.6	714.4	635.9	798.8	162.9	25.6
2	Strawberries and wild strawberries	194.1	240.3	230.1	346.6	394.6	467.8	73.2	18.6
3	Beet and cane sugar	188.8	86.9	103.7	122.2	183.8	434.7	250.9	2.4 times
4	Potato	217.1	278.3	225.7	206.7	350.6	418.4	67.8	19.3

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
5	Wheat flour	167.2	232.3	140.5	195.6	115.8	390.7	274.9	3.4 times
6	Fresh grapes	221.5	234.9	235.8	254.3	238.9	288.2	49.3	20.6
7	Beans	157.8	110.7	150.5	189.4	219.7	263.1	43.4	19.8
8	Fresh bulb vegetables	131.1	274.0	213.4	166.6	247.5	243.9	-3.6	-1.5
9	Vegetables cooked or canned without vinegar	95.8	78.7	110.3	132.2	140.5	234.6	94.1	67.0
10	Potatoes cooked or canned without vinegar (including chips)	62.9	95.8	70.0	94.2	139.9	199.9	60.0	42.8
	Other products	2,741.5	2,924.5	2,890.2	3,620.7	3,958.6	4,646.3	687.7	17.4
	Total	**4,844.6**	**5,218.0**	**5,018.7**	**6,042.9**	**6,625.8**	**8,386.4**	**1,760.6**	**26.6**

Source: ITC Trade Map

Export structure of Egyptian agricultural products in value terms, 2023, %



Source: ITC Trade Map

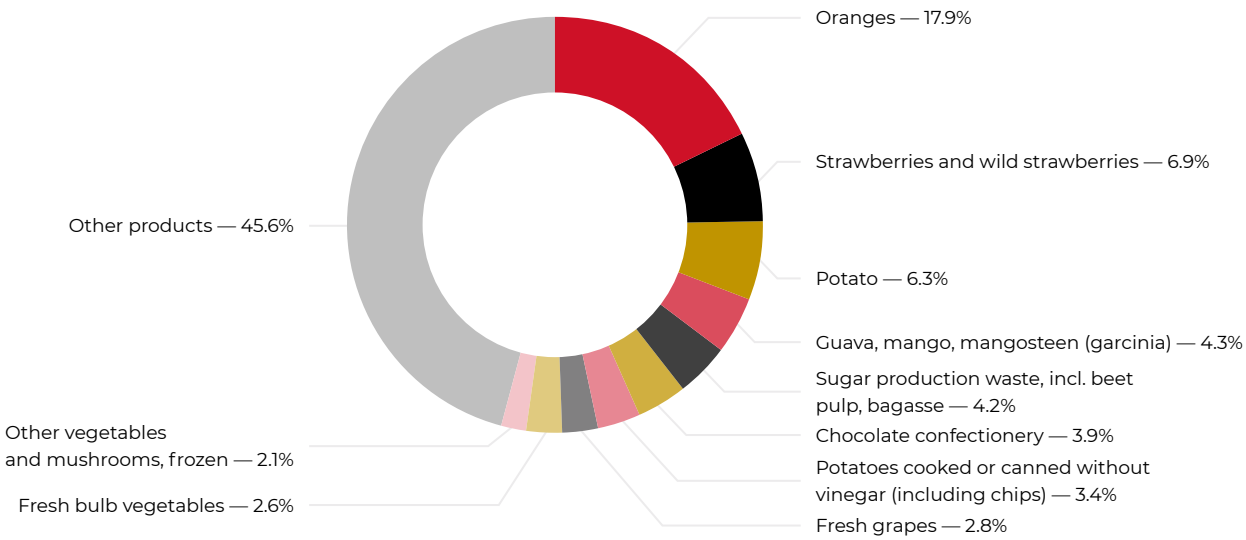
In the export structure of Egyptian agricultural products to the BRICS countries in 2023 oranges accounted for 17.9% of supplies, strawberries and wild strawberries — 6.9%, potatoes — 6.3%.

Export structure of Egyptian agricultural products to the BRICS countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Oranges	355.7	360.3	333.5	285.2	324.0	332.7	8.7	2.7
2	Strawberries and wild strawberries	50.3	69.6	63.9	84.3	115.5	128.6	13.2	11.4
3	Potato	118.5	65.8	81.8	85.2	153.0	117.2	-35.8	-23.4
4	Guava, mango, mangosteen (garcinia)	15.1	18.3	25.9	34.2	71.8	80.4	8.5	11.9
5	Sugar production waste, incl. beet pulp, bagasse	1.2	14.6	20.7	53.3	61.2	78.1	16.9	27.6
6	Chocolate confectionery	55.3	83.0	68.3	60.1	84.1	72.0	-12.1	-14.4
7	Potatoes cooked or canned without vinegar (including chips)	26.2	33.2	22.5	30.9	52.6	63.6	10.9	20.7
8	Fresh grapes	34.0	38.2	40.9	49.9	63.9	52.5	-11.4	-17.9
9	Fresh bulb vegetables	86.3	88.1	82.8	52.0	91.3	48.4	-43.0	-47.0
10	Other vegetables and mushrooms, frozen	20.3	14.4	24.4	30.1	43.4	39.3	-4.1	-9.5
	Other products	596.0	561.1	617.2	600.6	723.6	849.1	125.6	17.4
	Total	**1,358.9**	**1,346.7**	**1,382.1**	**1,366.0**	**1,784.6**	**1,861.9**	**77.4**	**4.3**

Source: ITC Trade Map

Export structure of Egyptian agricultural products to the BRICS countries in value terms, 2023, %



Source: ITC Trade Map

In the export structure of Egyptian agricultural products to other countries in 2023 oranges accounted for 7.1%. Significant volumes were also accounted for beet and cane sugar (6.5%), wheat flour (5.9%), the supply of which increased relative to the previous year by 2.3 and 3.6 times, respectively.

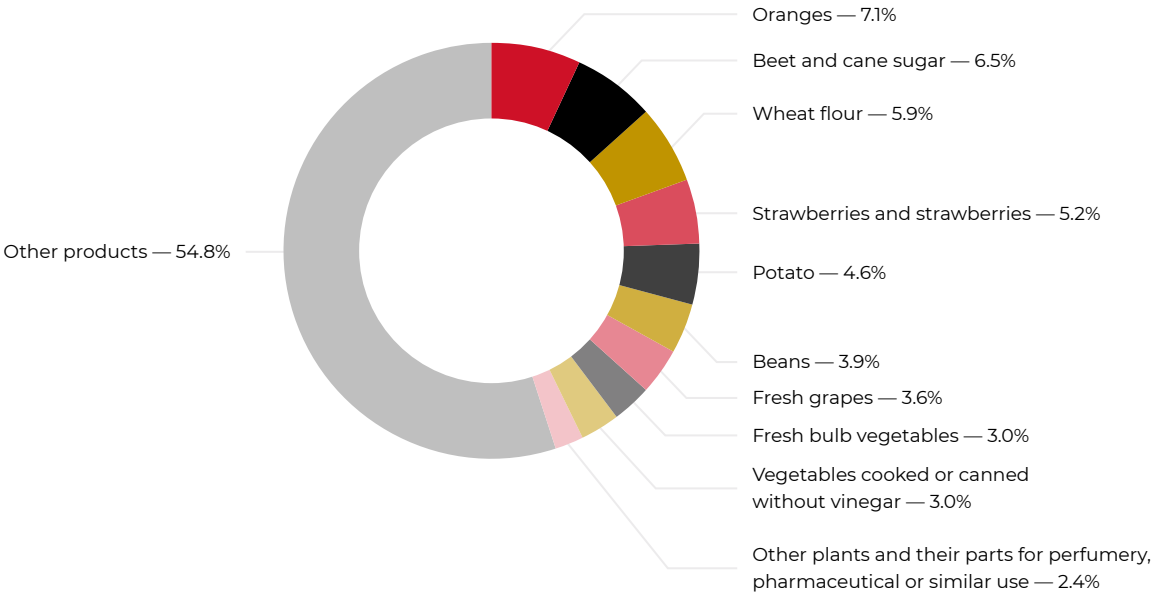
Export structure of Egyptian agricultural products to other countries in value terms, 2018–2023, million US dollars

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Oranges	311.0	301.4	315.1	429.2	311.9	466.1	154.2	49.4
2	Beet and cane sugar	170.4	84.1	103.1	122.2	182.1	422.9	240.8	2.3 times
3	Wheat flour	164.0	230.8	138.4	194.2	108.8	386.7	277.9	3.6 times
4	Strawberries and wild strawberries	143.8	170.7	166.2	262.3	279.2	339.2	60.0	21.5
5	Potato	98.6	212.4	143.8	121.4	197.6	301.2	103.6	52.4
6	Beans	150.3	104.6	143.7	182.4	209.6	252.0	42.4	20.2
7	Fresh grapes	187.5	196.7	194.9	204.4	175.0	235.8	60.7	34.7
8	Fresh bulb vegetables	44.8	185.9	130.5	114.6	156.2	195.5	39.3	25.2
9	Vegetables cooked or canned without vinegar	74.5	67.0	75.2	111.8	120.8	194.1	73.3	60.7

№	Name	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
10	Other plants and their parts for perfumery, pharmaceutical or similar use	99.8	102.9	116.6	146.4	141.8	156.1	14.3	10.1
	Other products	2,040.9	2,214.8	2,109.1	2,788.1	2,958.3	3,575.0	616.7	20.8
	Total	**3,485.7**	**3,871.3**	**3,636.6**	**4,676.9**	**4,841.3**	**6,524.5**	**1,683.2**	**34.8**

Source: ITC Trade Map

Export structure of Egyptian agricultural products to other countries in value terms, 2023, %



Source: ITC Trade Map

The BRICS countries cumulatively accounted for 22.2% of Egypt's agro-industrial export in 2023. The largest importing countries among the BRICS countries were Saudi Arabia (9.0% of export in value terms), Russia (4.9%) and the UAE (4.0%).

Among other countries the main importers of Egyptian agricultural products in 2023 were Sudan (5.8%), the Netherlands (5.3%), Libya (4.2%), the USA (3.5%) and Italy (3.4%).

The main importing countries of agricultural products from Egypt in value terms, 2018–2023, million US dollars

№	Country	2018	2019	2020	2021	2022	2023	2023/2022	
								million US dollars	%
1	Saudi Arabia	579.6	547.5	553.3	523.3	713.8	754.4	40.6	5.7
2	Russia	355.5	306.7	346.9	328.5	494.1	406.9	-87.2	-17.6
3	UAE	225.1	250.5	243.3	219.5	327.1	339.5	12.4	3.8
4	China	70.2	128.6	99.1	129.3	117.6	146.7	29.0	24.7
5	India	58.6	47.4	53.0	95.3	62.2	90.2	28.0	45.0
6	Brazil	33.5	22.1	49.9	31.6	41.1	80.1	39.0	2.0 times
7	South Africa	25.5	25.9	25.3	20.2	20.8	34.3	13.4	64.3
8	Ethiopia	10.7	18.1	11.3	18.4	7.8	9.5	1.7	21.2
9	Iran	0.2	0.0	0.0	—	0.0	0.4	0.4	14 times
	Total BRICS	**1,358.9**	**1,346.7**	**1,382.1**	**1,366.0**	**1,784.6**	**1,861.9**	**77.4**	**4.3**
1	Sudan	4.2	41.4	67.9	206.8	196.1	483.9	287.8	2.5 times
2	Netherlands	211.5	229.1	252.3	255.0	292.9	447.8	154.9	52.9
3	Libya	246.8	220.4	149.8	175.5	234.7	356.0	121.2	51.6
4	USA	119.7	145.8	154.6	185.4	258.6	289.5	30.9	11.9
5	Italy	147.1	153.5	150.4	158.3	170.1	288.6	118.4	69.6
6	Palestine	75.6	107.4	101.6	144.4	209.6	279.6	70.0	33.4
7	United Kingdom	176.6	214.3	200.6	217.3	239.0	261.3	22.3	9.3
8	Morocco	122.5	128.9	115.9	197.6	162.4	253.3	90.9	56.0
9	Jordan	231.3	231.6	203.3	204.9	245.3	249.3	4.0	1.6
10	Iraq	173.8	131.2	127.9	117.2	155.5	238.8	83.3	53.6
	Other countries	1,976.4	2,267.7	2,112.4	2,814.5	2,677.2	3,376.5	699.4	26.1
	Total non-BRICS	**3,485.7**	**3,871.3**	**3,636.6**	**4,676.9**	**4,841.3**	**6,524.5**	**1,683.2**	**34.8**
	Total	**4,844.6**	**5,218.0**	**5,018.7**	**6,042.9**	**6,625.8**	**8,386.4**	**1,760.6**	**26.6**

Source: ITC Trade Map

2.6.3.3. International cooperation

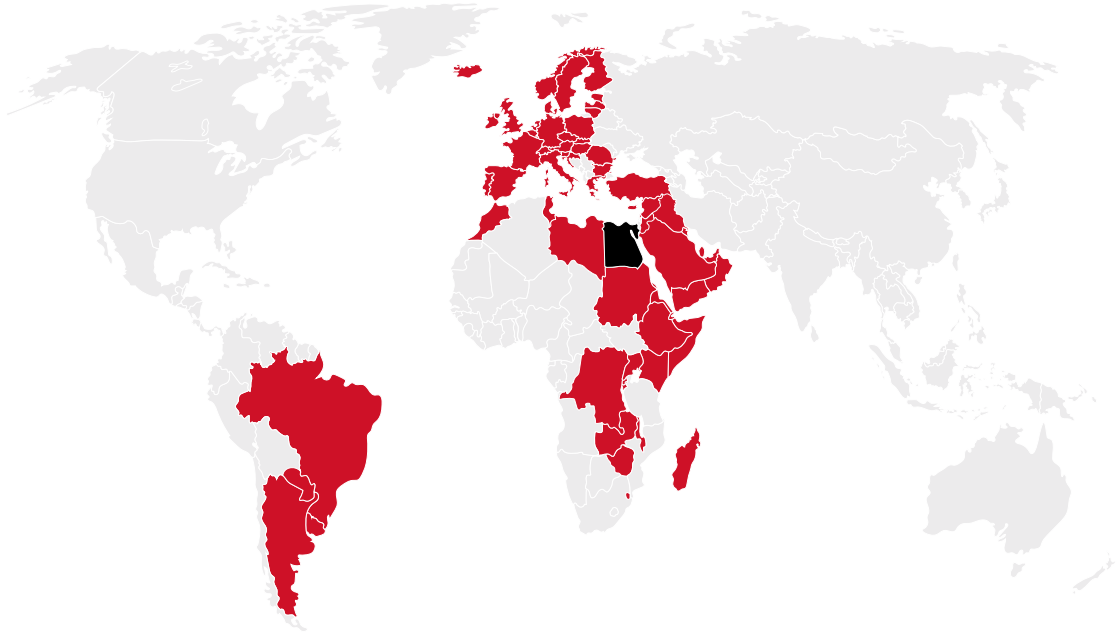
In February 2004 Egypt signed a free trade agreement (the Agadir Agreement, which entered into force in 2007) with three Mediterranean Arab countries: Jordan, Morocco and Tunisia.

Egypt is also a party to the Greater Arab Free Trade Area. Since January, 2005 tariffs on most goods from the reciprocal trade of the member states of the agreement (referred to as GAFTA) have been eliminated. GAFTA participants today are the countries of North Africa and the Arabian Peninsula (Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, the UAE and Yemen).

Egypt became a member of COMESA (21 states are members of the agreement: Burundi, DR Congo, Djibouti, Zambia, Zimbabwe, Egypt, Kenya, Comoros, Libya, Mauritius, Madagascar, Malawi, Rwanda, Eswatini, Seychelles, Somalia, Sudan, Tunisia, Uganda, Eritrea, Ethiopia) in June 1998. In October 2000 Egypt, along with 13 other member states, eliminated tariffs on goods originating in the COMESA countries.

The agreement between Egypt and the European Union entered into force in June 2004. This agreement is of particular importance to Egypt as the European Union is its main trade and investment partner. Egypt and the countries of the European Free Trade Association (EFTA: Iceland, Liechtenstein, Norway, Switzerland) concluded a free trade agreement that entered into force in August 2007.

Egypt trade agreements



State/association with which Egypt has entered into a preferential trade agreement	Effective date of the agreement
COMESA: Burundi, Comoros, Democratic Republic of Congo, Djibouti, Egypt, Eritrea, Eswatini, Ethiopia, Kenya, Libya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Somalia, Sudan, Tunisia, Uganda, Zambia, Zimbabwe	1998
GAFTA: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, the UAE, Yemen	1998
European Union: Austria, Belgium, Bulgaria, Hungary, Germany, Greece, Denmark, Ireland, Spain, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Finland, France, Croatia, Czech Republic, Sweden, Estonia	2004
Agadir Agreement: Jordan, Morocco, Tunisia	2007
Türkiye	2007
EFTA: Iceland, Liechtenstein, Norway, Switzerland	2007
MERCOSUR: Argentina, Brazil, Paraguay, Uruguay	2017
United Kingdom	2021

2.6.3.4. Special economic zones

Egypt has been using free economic zones for many years for the development of the national economy. The first zone was established in 1974 near the port city of Port Said. Now Egypt has seven types of economic zones: public and private free trade zones (FTZs), investment and technology zones, special economic zones (SEZs), industrial and qualified industrial zones. The main regulator for free zones is the General Authority for Investment and Free Zones.

Free economic zones differ in size and specialization. The largest are the Golden Triangle SEZ and the Suez Canal SEZ, within which the ports are located. Economic zones are located in different parts of the country. State FTZs, investment zones and qualified industrial zones are concentrated in the most developed regions (Cairo, Alexandria, Suez Canal). Industrial zones are present in almost all 27 governorates, including southern and desert areas with low levels of investment.

SEZs provide the following preferences:

- exemption from taxes and customs duties;
- no regulations on export-import operations;
- exemption from import duty and sales tax.

For foreign investors the Suez Canal SEZ is the most attractive. Since 2015 it has specialized in agricultural and industrial production, infrastructure services and the development of transport links. Resident companies can import production equipment, raw materials and intermediate products duty-free; they are also exempt from indirect taxes and sales tax.

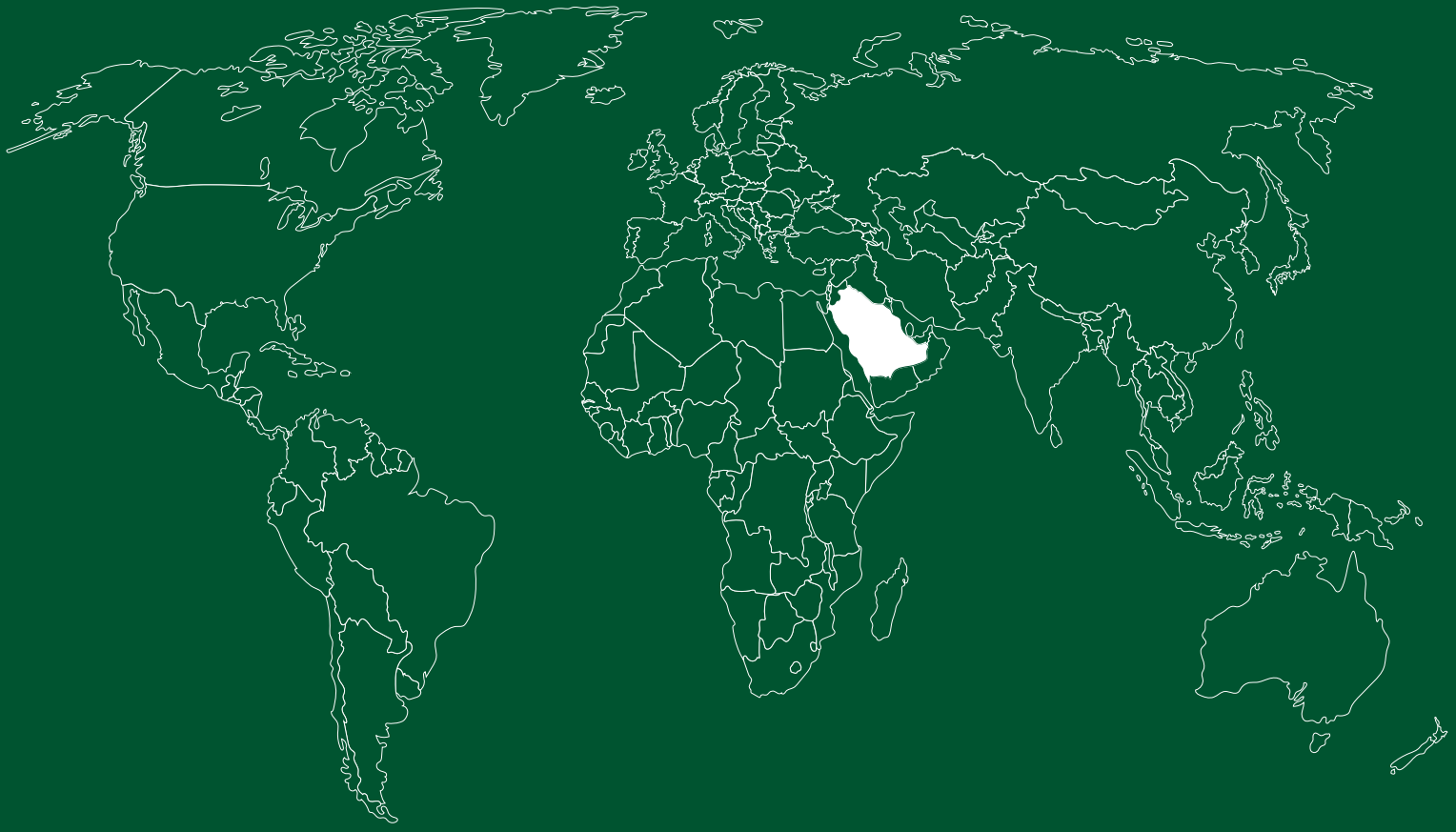
2.6.3.5. Institutes for supporting the export of agricultural products

Export Development Authority

Description	A subordinate institution of the Ministry of Trade and Industry of the Arab Republic of Egypt. The purpose of the institution is to form a platform that unites participants in export activities in order to implement the Ministry's strategy to increase and promote national export. The department organizes business missions, B2B meetings and also provides assistance in promoting products on electronic trading platforms
Main goals	• providing consulting services to exporters; • information and analytical support for exporters; • raising awareness of the benefits of export activities; • search for foreign buyers of egyptian products, organizing B2B meetings and business missions; • promotion of egyptian products on electronic trading platforms; • professional development of exporters, creation of a system of knowledge and competencies in the field of foreign economic activity
Contact details	**Address:** Governmental District - Ministry of Trade and Industry - Administrative Capital **Tel.:** +202 3749 3921; +202 3749 3920 **E-mail:** expoegypt.gov@gmail.com **Website:** http://www.expoegypt.gov.eg/

Industrial Modernization Centre

Description	A subordinate institution of the Ministry of Trade and Industry of the Arab Republic of Egypt. It was established with joint funding from the egyptian government, private sector enterprises and the European Union with the aim of developing national production, increasing competitiveness and developing the export of egyptian products. The center's activities cover agriculture, food production, as well as light and heavy industry, pharmaceuticals, chemical industry and others. The center provides services independently or using a network of accredited contractors
Main goals	• assessment of the enterprise's readiness for export activities; • development of export strategies, as well as communication strategies for foreign markets; • raising awareness of national export and opportunities for its development; • providing assistance in concluding export transactions; • promotion of egyptian products on electronic trading platforms
Contact details	**Address:** Extension of Ramses Street Nasr City Ministry of Finance, Building Tower 5, 6th & 7th Floor Cairo **Tel.:** +202 5770 090 **E-mail:** info@imc-egypt.org **Website:** http://www.imc-egypt.org/index.php/en/



Expert opinion

Dr. Saade Abdullah Kalil Esa

Economic Advisor, Ministry of Environment, Water and Agriculture of the Kingdom of Saudi Arabia

"The BRICS countries must complement each other because some of them has the natural resources for agricultural production such as irrigation water fertile soil and labor but they lack capital investment, modern production technology and sometimes experience. While other countries of BRICS who lack the natural resources but have the financial capabilities, experience and modern production technology. By doing so all BRICS countries can achieve sustainable food security.

The Action Plan 2021-2024 provides for enhanced cooperation in the field of agriculture amongst BRICS nations and focuses on the themes of food security, welfare of farmers, conservation of agro biodiversity, resilience of food and agricultural production systems, promotion of digital agricultural solutions etc.

The Action Plan 2021-2024 was developed to achieve the following objectives:

- accelerate and sustain agricultural development for enhanced food security and nutrition, especially in view of the challenges posed by COVID-19 pandemic across all countries;
- support efforts in fighting poverty and hunger at the global level;
- enhancing trade of safe and quality agro-products and investment of BRICS agribusiness;
- promote new solutions for sustainable agriculture.

For the successful implementation of the Plan, it is necessary to combine the efforts of all BRICS countries, as well as the effective use of their existing capabilities."

2.7. Saudi Arabia

2.7.1. Social and economic profile

The Kingdom of Saudi Arabia (Saudi Arabia) situated in the Arabian Peninsula between the Persian Gulf and the Red Sea is the largest country in the Middle East by land area. The state is divided into 13 provinces, the capital is Riyadh. Saudi Arabia is one of the world's leading oil producers and exporters, and thanks to oil revenues the country has been developing dynamically in recent decades. Since 2017, Kingdom's government has been carrying out structural reforms aimed at diversifying the economy and improving the living standards of the population.

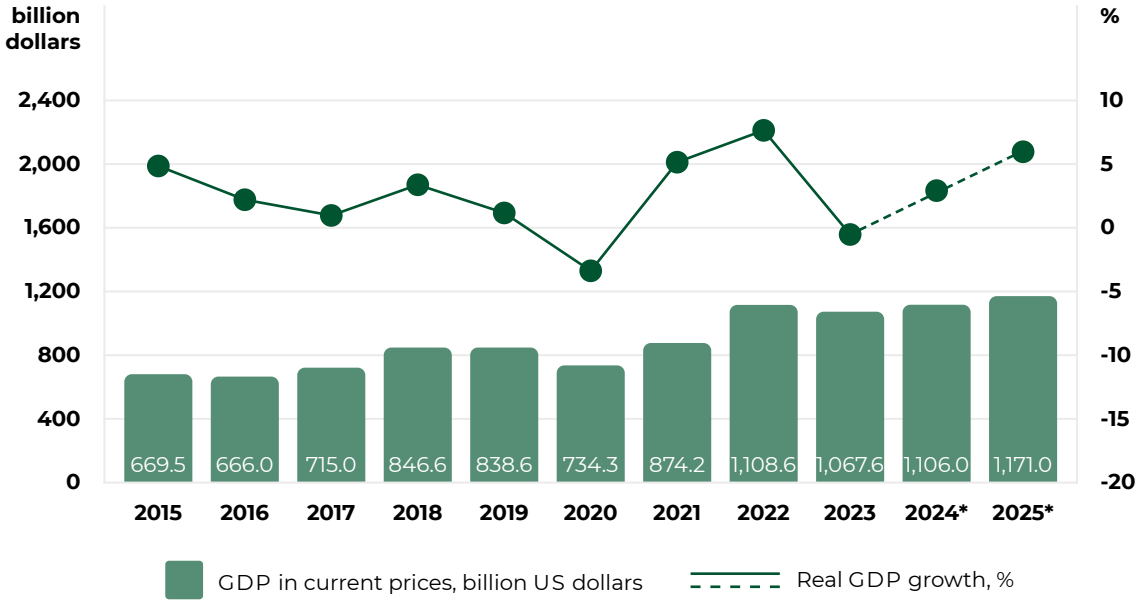
By the end of 2023 Kingdom's population is estimated at 32.8 million people. In 2022 the urbanization rate reached 84.7%. As of 2022 the unemployment rate in Saudi Arabia stood at 5.6%.

In Saudi Arabia's GDP agriculture accounts for 2.4%, while the industrial and service sectors account for 53.2% and 39.8%, respectively. About 2.9% of the population is employed in agriculture, 16.9% in industry, and 80.2% in the service sector. In 2022 in the structure of Saudi Arabia's import of agricultural products accounted for 15.7% of the total import of goods in value terms. The share of agricultural products in export was 1.2%.

The oil and gas sector dominates the Saudi Arabian economy. According to the country's Ministry of Economy and Planning, in 2022 hydrocarbon production and processing accounted for about 40% of GDP, 70% of state budget revenues and 80% of export of goods and services. Saudi Arabia is the fastest growing economy among the G20 countries; in 2022 country's real GDP grew by 7.5% due to increased oil production and high world oil prices. Meanwhile, excluding the oil and gas sector, country's economic growth stood at 4.8% as a result of stable private consumption and significant investments in the implementation of megaprojects, tourism development and other non-oil sectors of the economy.

The situation on the hydrocarbon market remains a leading factor determining the dynamics of Saudi Arabia's economic development. The country is a key member of the Organization of the Petroleum Exporting Countries (OPEC), which seeks to maintain stable oil prices by limiting production. In 2023 against the background of declining world prices for hydrocarbons, the OPEC+ countries (an expanded format of the organization, including Russia and Brazil) decided to reduce oil production. As a result, according to IMF estimates, Saudi Arabia's real GDP fell by 0.8% at the end of the year. In March 2024 OPEC+ members announced the extension of production restrictions until the middle of the year due to price conditions that were unfavorable for oil-producing countries. Prospects for further growth of Saudi Arabia's real GDP depend on subsequent OPEC+ decisions and the overall situation in the global economy. Saudi Arabia needs revenue from hydrocarbon export primarily to implement a large-scale reform programme as part of the Saudi Vision 2030 strategy.

Dynamic of Saudi Arabia's GDP in current prices, 2015-2025

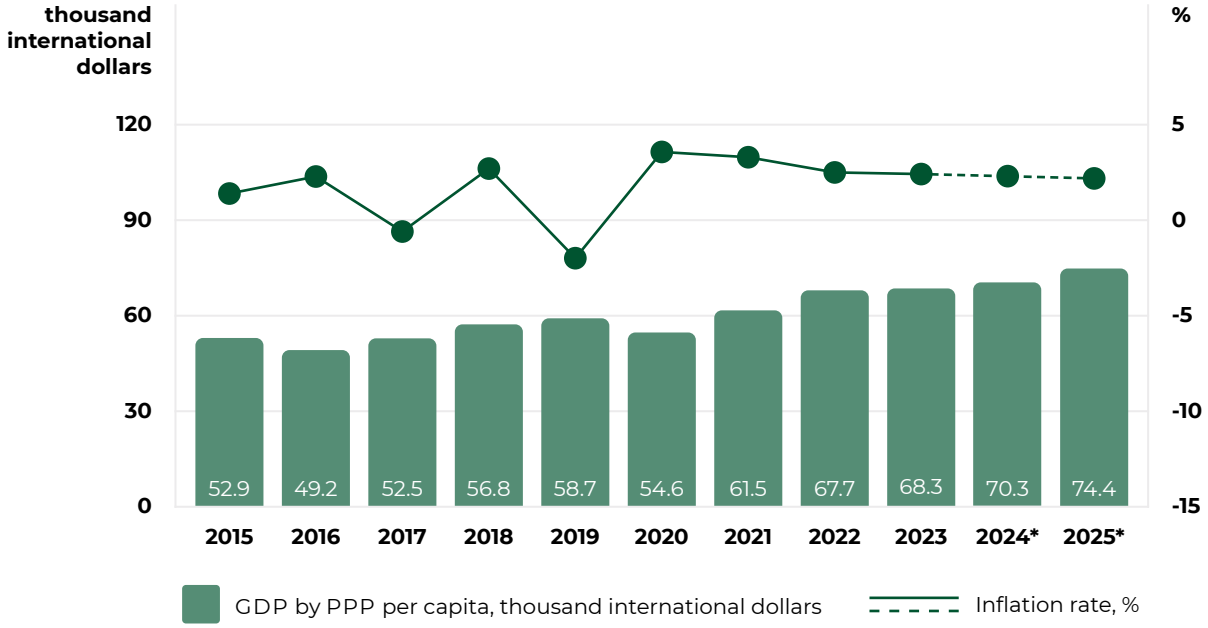


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

Saudi Arabia's inflation rate has remained stable over the past few years. In 2022 it was 2.5% in annual terms, having significantly decreased compared to 2020-2021 level. The low inflation rate in Saudi Arabia is especially indicative amid a sharp jump in the global average consumer price in 2020-2022. Factors that affected the rise of inflation in other countries (the COVID-19 pandemic, growing energy prices, supply chain disruptions) had a smaller impact on the Gulf countries; consumer price growth in the region remained significantly below the world average. Over the medium-term consumer price growth in Saudi Arabia is expected to remain at its current level of 2-2.5%.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

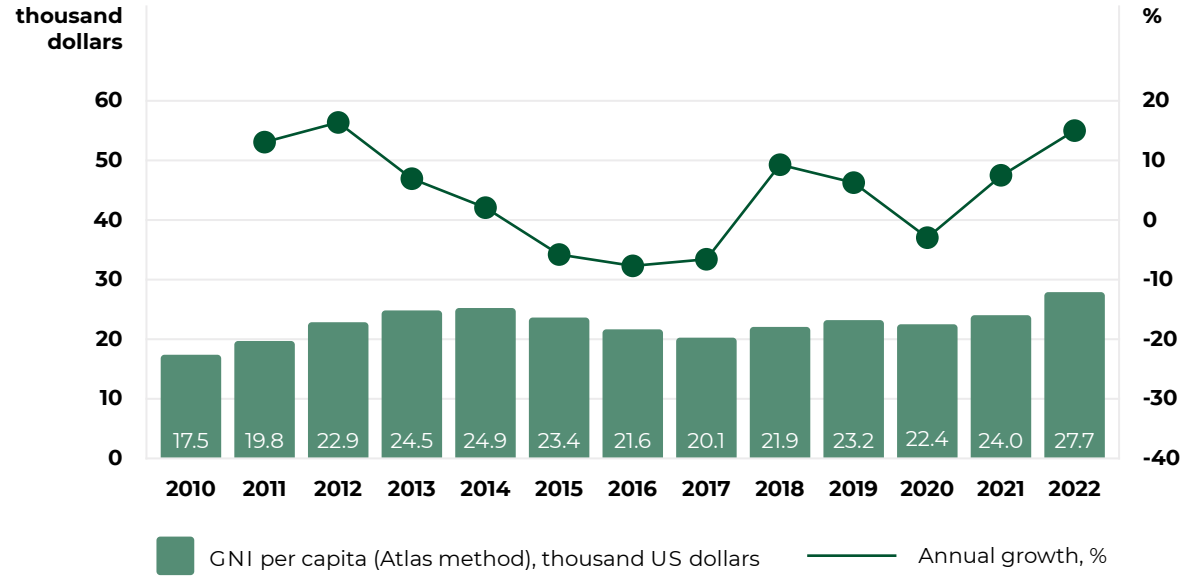


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, Saudi Arabia belongs to the group of high-income countries by GNI per capita based on the Atlas method. In 2022 Saudi Arabia's GNI per capita was 27.7 thousand US dollars, which is 15.2% higher compared to the previous year.

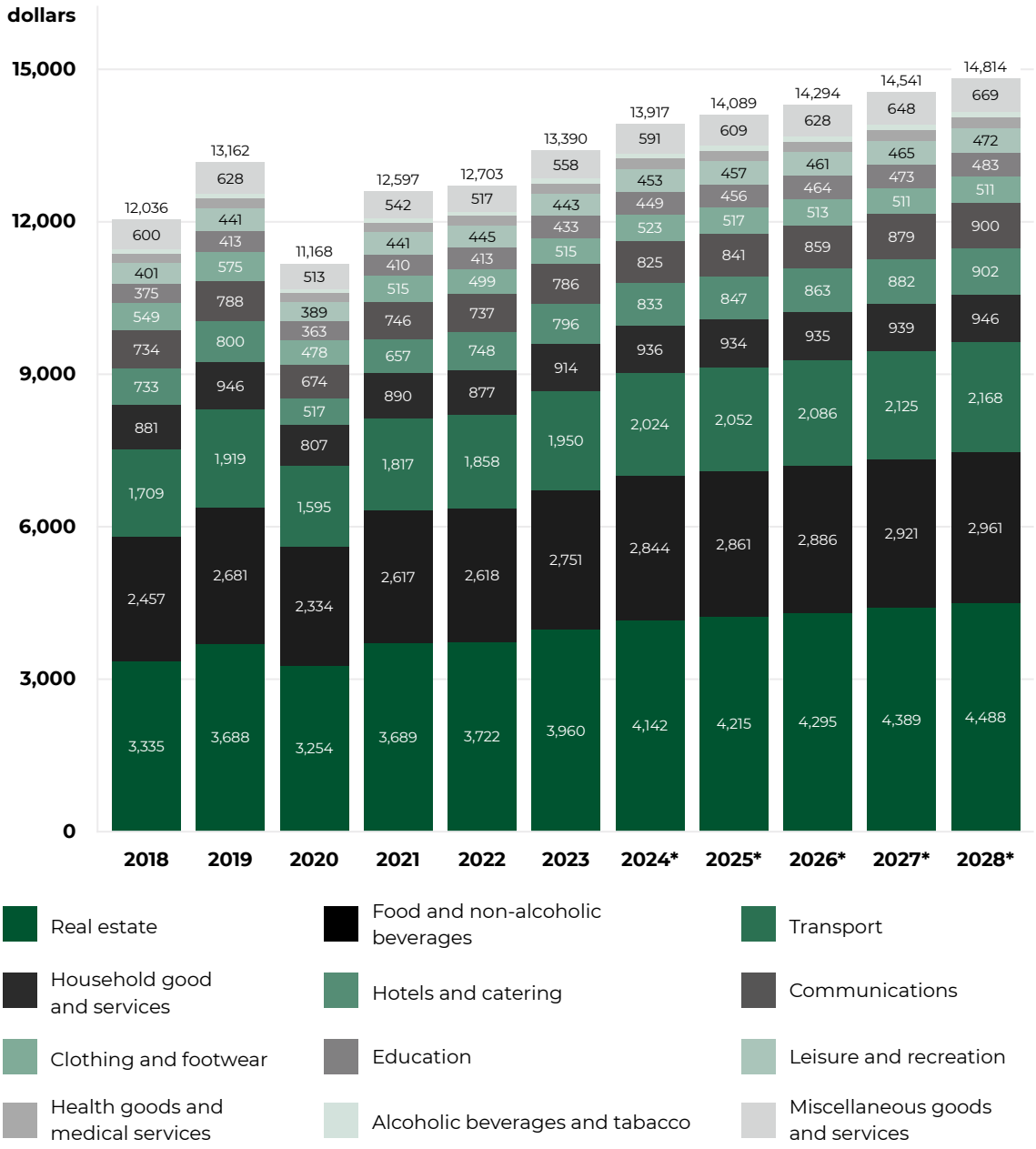
Dynamics of GNI per capita in Saudi Arabia, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 amounted to 13,390 US dollars at constant 2023 prices, which is 5.4% more than in 2022. Real estate represented the majority of expenditures — about 29.6%. Expenditures on food and non-alcoholic beverages accounted for 20.5% and ranked second in the structure of final consumption expenditures. By 2028 final consumption expenditures per capita are projected to reach 14,814 US dollars, where food and non-alcoholic beverages will account for 2,961 US dollars (20.0%).

Final consumption expenditure in Saudi Arabia per capita at constant 2023 prices, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.7.2. Agriculture

2.7.2.1. Crop and livestock production

Agriculture plays a minor role in the economy of Saudi Arabia. The sector accounts for about 2.4% of GDP and 2.9% in the structure of the employed population. Meanwhile, the state and commercial sector have been taking significant efforts to build up agricultural production by implementing programmes to green the deserts that make up most of Kingdom's area and also by actively using high-tech irrigation systems.

The main crop of the country is dates. In 2022 production of dates amounted to 1.6 million tons, which is 2.9% more than in 2021. Saudi Arabia is the second largest producer of dates in the world, second only to Egypt. Saudi Arabia's level of self-sufficiency in dates reached 124% in 2022. In addition, fruits such as watermelons and grapes are grown in the country, in 2022 their production amounted to 605.0 and 110.5 thousand tons, respectively. In the category of vegetables, roots and tubers, the most common crops are tomatoes, potatoes and onions — in 2022 their production reached 658.5 thousand tons, 605.0 thousand tons and 310.0 thousand tons, respectively. The country has been actively building greenhouses and vertical farms, and advanced hydroponic technologies are widely used. Among grain crops, the majority of production comes from wheat (800 thousand tons in 2022) and sorghum (120 thousand tons).

Production of crop products, thousand tons

	2018	2019	2020	2021	2022
Fruits and berries	**2,365.1**	**2,805.7**	**3,108.9**	**2,840.9**	**2,905.9**
Dates	1,302.9	1,539.8	1,541.8	1,565.8	1,610.7
Watermelons	634.5	687.7	522.2	624.1	605.0
Grapes	44.8	117.6	101.6	106.4	110.5
Vegetables, roots and tubers	**1,166.7**	**1,119.6**	**2,066.1**	**2,057.8**	**2,179.5**
Tomatoes	312.3	259.9	598.8	620.9	658.5
Potatoes	482.4	474.1	562.3	578.1	605.0
Onions	71.6	86.9	259.7	298.0	310.0
Cereals	**1,378.9**	**1,293.6**	**1,251.0**	**877.6**	**1,068.7**
Wheat	586.4	500.2	554.6	612.6	800.0
Sorghum	144.0	116.6	117.4	119.4	120.0
Olives	**357.8**	**357.8**	**364.5**	**382.1**	**388.2**

Source: FAOSTAT, MEWA

Saudi Arabia has developed both meat and dairy farming. In particular, the country is fully self-sufficient in dairy products: according to official data, in 2022 the level of self-sufficiency was 118%, when more than 2.5 million tons of raw cow's milk were produced. Poultry farming is also highly developed in the country. In 2022 Saudi Arabia produced 1.1 million tons of poultry meat, as well as 6.94 billion chicken eggs. The increase in poultry meat production that the country has seen in recent years resulted from the expansion of production capacities of leading companies (Al Watania Poultry, Fakieh Poultry, Alyoum Chicken) and additional support measures taken by the government in the form of subsidies, investments in raising broiler chickens, as well as permits issued to those who use the land for poultry farming. As part of the national development program "Saudi Vision 2030", Kingdom's authorities have sought to achieve a level of self-sufficiency in poultry meat of more than 90%.

In 2022 fish and seafood production amounted to 184.8 thousand tons. According to official data, country's level of self-sufficiency in this type of product is estimated at 48%. The main share in the catch structure is made up of shrimp, mackerel, bonito and rockfish. Most seafood is caught in the Persian Gulf; fishing in the Red Sea is less developed.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	6.39	6.46	6.50	6.65	6.94
Dairy, thousand tons	2,074.6	2,393.8	2,593.8	2,600.0	2,529.2
Poultry, thousand tons	710.0	800.0	900.0	913, 1	1,130.0
Fish and seafood, thousand tons	122.9	141.0	157.7	181.9	184.8

Source: FAOSTAT, MEWA

2.7.2.2. Overview of milestones in the agro-industrial complex

1945 Foreign policy

Joining the League of Arab States — one of the largest international organizations in terms of population and GDP.

1947 New institutes

Within the Ministry of Finance of Saudi Arabia, the General Directorate of Agriculture was established — the first element of the state power system in the history of the country that was responsible for the development of the agro-industrial complex only.

1948 Foreign policy

Joining the Food and Agriculture Organization of the United Nations (FAO).

1953 New institutes

Transformation of the General Directorate of Agriculture into an independent Ministry of Agriculture and Water Resources.

1957 Foreign policy

The country's accession to the International Monetary Fund (IMF) and the International Bank for Reconstruction and Development (IBRD).

1963 New institutes

Establishment of the Saudi Arabian Agricultural Development Fund.

1968 Industry development

Launch of a program for the distribution and reclamation of unused land, within the framework of which the state transferred the ownership of agricultural land to farmers free of charge, provided that the land they received would be developed within a certain period.

1970 Development plan

Adoption of the first five-year economic development plan. The target for average annual growth of the country's real GDP is set at 9.8% with priority given to the development of non-resource sectors and infrastructure. The implementation of the plan coincided with a significant increase in oil production and an increase in world oil prices, due to which Saudi Arabia's economic growth rates and budget revenues significantly exceeded forecasts. Expenses for the implementation of the plan increased by 2.1 times compared to the originally planned and amounted to 21 billion US dollars, revenues exceeded the planned level by 4.8 times and amounted to over 43 billion US dollars.

1970 Foreign policy

Under the auspices of the League of Arab States, the Arab Organization for Agricultural Development (AOAD) was created in order to promote the development of the agro-industrial complex in member countries and coordinate this process at the supranational level.

1972 New institutes

Establishment of the Saudi Arabian Grain Silos and Flour Mills Organization (GSFMO) responsible for the procurement and storage of wheat, the construction of flour mills and the production of animal feed in the country.

1975 Development plan

Adoption of the second five-year economic development plan. The main goals include an average annual GDP growth rate of 10% (for the non-resource sector — 13.3%), jobs creation, improving the standard of living of the population, diversifying the economy and

reducing import dependency. The plan provides for the active construction of infrastructure, the introduction of free medical care and education, the provision of interest-free loans for the purchase of housing, subsidizing prices for essential goods, as well as the expansion of social support in general. The implementation of the plan saw a spike in inflation, a drastic labor shortage, and as a result, real GDP growth did not reach the target value. However, production in the non-oil sector grew by a record 15.1% (agro-industrial complex — by 5.4%), its share in the GDP structure rose from 27% to 39%, and the country began to actively attract labor migrants.

1977 Foreign policy

Joining the International Fund for Agricultural Development (IFAD).

1977 Companies

Establishment of Almarai, the largest food company in Saudi Arabia in terms of capitalization.

1980 Development plan

Adoption of the third five-year economic development plan, the implementation of which saw the fastest growth rate — 8.1% — in agriculture. Amid declining oil production, the country's government focused on maintaining macroeconomic and social stability, as well as finishing large infrastructure projects that had been previously launched.

1981 Foreign policy

Establishment of the Cooperation Council for the Arab States of the Gulf (Saudi Arabia is one of the six founding states).

1982 Foreign policy

Joining the World Intellectual Property Organization (WIPO).

1988 Foreign policy

Joining the Multilateral Investment Guarantee Agency (MIGA).

1995 Development plan

Amid persistently low world oil prices, global economic restructuring and population growth, Saudi Arabia's sixth economic development plan was adopted. Programme's stated goals included job creation, higher labor productivity, privatization and priority support for the private sector, including in the agro-industrial complex.

2002 New institutes

Taking into account that the issue of providing the country with water has a particular importance, an independent Ministry of Water Resources, a former part of the Ministry of Agriculture of Saudi Arabia, was established.

2005 Development plan

The key priorities of the eighth five-year economic development plan included improving the standard and quality of life; supporting scientific research; integration into the global economy and increasing the competitiveness of national producers. Particular attention was paid to enhancing the investment climate, developing tourism and information technology, as well as women's economic empowerment. The programme set the target for annual growth in fisheries, agriculture and forestry production at 3.2%. The plan also provides for optimization of water use in agriculture.

2005 Foreign policy

The country's accession to the World Trade Organization (WTO).

2007 Domestic policy

It was announced that programmes to support domestic wheat production were to be phased out due to potential depletion of water supplies. Government Decree No. 335/2007 instructed the GSFMO to reduce wheat procurement quotas from local farmers by 12.5% annually in order to cease the cultivation of this crop entirely by early 2015-2016.

2008 M&A

Saudi Almarai acquired a 75% stake in Teeba Investment for Developed Food Processing Company that was a key player on the Jordanian dairy and juice market. The deal was worth 126.4 million US dollars.

2009 M&A

Joint venture of Almarai and PepsiCo acquired the International Company for Agro-Industrial Projects (Beyti) that was one of the largest producers of dairy products and juices in Egypt.

2010 Development plan

The ninth economic development plan was adopted, it stipulated that in 2010-2014 agro-industrial complex production should increase by an average of 1.7% annually, accounting for up to 4% in the GDP structure by the end of the period.

2011 M&A

As part of the Saudi Arabian government's strategy to outsource the production of water-intensive crops, Almarai acquired the assets of Fondomonte, major Argentine producer of animal feed. The transaction was worth 312 million Saudi riyals (83 million US dollars).

2015 Domestic policy

Since the government cut off support for the country's wheat production, the GSFMO was restructured and renamed the Saudi Grains Organization (SAGO). The new institute was tasked with focusing on maintaining uninterrupted supplies and processing of imported grains.

2016 Development plan

Publication of the Saudi Vision 2030 strategic plan for economic development and diversification, which included an agricultural modernization programme. Special attention was paid to supporting aquaculture, conserving water resources, reducing food waste, and expanding strategic partnerships with countries that had abundant water resources and fertile soils.

2016 New institutes

The abolition of the Ministry of Water and Electricity, whose functions related to water resources were transferred to the new Ministry of Environment, Water and Agriculture of Saudi Arabia.

2018 Industry development

The government has renewed support for feed wheat production to replace burclover production that requires more water.

2018 M&A

One of the largest Saudi food companies, Savola Group, announced the acquisition of a majority stake in Al Kabeer Group, key player in the frozen food market in the Gulf countries. The transaction was worth 565.5 million Saudi riyals.

2019 Foreign policy

Signing of a Memorandum on the mutual expansion of export of agricultural products and food between Russia and Saudi Arabia.

2020 Industry development

At the initiative of the SAGO, the phased privatization of the four largest flour mills in Saudi Arabia, which were owned by the state investment fund, began. Buyers included AlRaha AlSafi Food Company-Consortium, Alrajhi-Ghurair-Masafi Consortium, as well as other large private companies.

2021 Foreign policy

Approval of the second phase of the roadmap to develop scientific, technical and economic cooperation between Russia and Saudi Arabia until 2023, which comprised more than 50 projects in 60 different areas, including the agro-industrial complex.

2021 Industry development

Signing of two new project agreements on joint work to improve the efficiency of irrigation systems between the Saudi Department of Land Reclamation and FAO. As part of the initiative, it was planned to introduce advanced irrigation technologies and practices in the country's agriculture, and 6.8 million US dollars has been allocated for the implementation of new projects.

2021 Domestic policy

Signing of the law on agriculture (Government Decree No. 431/2021), which replaced a number of previously adopted regulations related to the agro-industrial complex. The provisions of the law defined the powers of the Ministry of Agriculture, formulated the basic principles and measures of state regulation and support for agriculture in Saudi Arabia, and also described the rules for trade in certain agro-industrial products. The document paid special attention to the production of organic agricultural products.

2022 M&A

Acquiring a 75% stake in Agricultural Machinery and Materials Company, Saudi manufacturer of fertilizers, plant protection products, equipment and veterinary drugs, by the Agrimatco, Cypriot agricultural company (Jeddah).

2022 M&A

Saudi Savola Foods Company acquired the assets of Egyptian Belgian Company for Industrial Investments (Egybelg), engaged in the production and sale of bakery products. The transaction was worth 622 million Egyptian pounds. Savola announced significant investments in modernizing its production and planned to enter the Egyptian snacks market.

2022 Development plan

The Ministry of Environment, Water and Agriculture of Saudi Arabia approved a programme to develop crop production through the use of advanced technologies worth 4 billion Saudi riyals (more than 1 billion US dollars) until 2025. A key element of the strategy is to increase the productivity of greenhouse farms (there are more than 73 thousand of them), it was planned to raise the total annual production capacity of greenhouses to 1 million tons.

2023 Industry development

Saudi Arabia's Ministry of Investment signed a 1 billion US dollars agreement with UPL Limited, Indian agrochemical company, to locate pesticide production on Kingdom’s territory.

2023 Domestic policy

Transformation of the SAGO into the General Food Security Authority, GFSA, responsible for creating and maintaining public food reserves, developing an early warning system for food shortages, reducing food waste and interacting with other countries and international organizations on related issues.

2024 Industry development

The country's government launched a programme to support agricultural start-ups in order to develop small and medium-sized businesses. Today only 1% of all Saudi start-ups operate in the agro-industrial complex, which is below the global average, but the country's Ministry of Environment, Water and Agriculture forecasts a significant increase in the number of such enterprises and expects that by 2030 the contribution of start-ups to the country's GDP will be about 4 billion riyals.

2024 Industry development

Saudi Arabia began exporting hydroponically grown vegetables to Europe. DAVA Agricultural Company of Saudi Arabia signed an agreement with Lehmann & Troost, Dutch company, for the supply of Saudi tomatoes to the Netherlands and other EU countries. The deal was aimed at making the marketing of Saudi Arabia's agricultural products more effective and further strengthening the potential of the Kingdom's agro-industrial complex.

2.7.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

Saudi Arabia remains a major importer of grains, meat and dairy products, fruits and vegetables. As the country's demand for food increases, more attention is paid to the development of its own agro-industrial complex. Thus, ensuring and strengthening the country's food security is one of the main goals of Saudi Vision 2030.

Much of the progress achieved by the Saudi Arabian agricultural sector in recent years has been driven by a number of government incentive programmes, including the provision of preferential interest-free loans, offering scientific and technical support and advisory services.

Sustainable development of agriculture

One of the country's most pressing agricultural problems is water scarcity — Saudi Arabia has one of the lowest precipitation levels in the world. To overcome the shortage of water resources, dams have been actively built across the country, including in dry river valleys (wadis) that are filled with water after heavy rainfall. These dams make it possible to use the water that fills the wadi during the rainy season. Moreover, groundwater and desalinated seawater are used for irrigation in Saudi Arabia — the country is a world leader by the number of desalination plants and the volume of seawater they process.

Meanwhile, in Saudi Arabia the production of field crops that require large amounts of water is under strict state control and has been actively outsourced in recent years. For example, Saudi companies invest in companies growing grains in Argentina and the United States, that ship the products directly to the Kingdom's market.

E-commerce development

Saudi Arabia, along with the UAE, is the largest market for the delivery of food and ready-to-eat meals among the Gulf countries. In 2019-2022 the number of applications for online food ordering has quadrupled. The food delivery market in Saudi Arabia is expected to grow at an annual rate of around 11% per year.

Development of the “Blue Economy” — fish and seafood

Saudi Arabia is washed by the seas of the Indian Ocean — the Red Sea on the west and the Gulf on the east. About 2,400 km of Saudi Arabia's coastline is suitable for marine aquaculture production. The main product of marine aquaculture is shrimp. Plans have been developed to cultivate marine fish, especially valuable marine fish species such as grouper, sea bream and sea bass, raised in floating cages in the Red Sea.

The Saudi Vision 2030 programme includes projects to develop aquaculture production to reach 600 thousand tons per year by 2030, which is twice the current consumption of fish and seafood in Saudi Arabia.

2.7.2.4. Key agricultural producers

The largest agricultural holdings in Saudi Arabia[10]

Savola Group

Activities	Production, processing, distribution, import, export, retail
Industry	Grain, oil and fat, dairy, ready-to-eat products, FMCG products
Description	A large industrial conglomerate based in Saudi Arabia. The company was founded in 1979 and since then it has become one of the leading players in the food, consumer goods and oil refining markets in the Middle East and Africa region. The main activities of the company: production of food and beverages (flour, edible oils and cooking fats, ready-to-eat products), FMCG goods, investments in real estate and industrial projects, oil refining. Savola Foods is a key division of Savola Group, which plays a key part in the Group's investments and operations, including the production and promotion of food and beverages, as well as the import and export business. In 2022-2023 the company's revenue amounted to 7.0 billion US dollars
Contact Information	**Address:** Savola Tower Ashati District, Prince Faisal Bin Fahd Road, Savola Group 2444 Taha Khusaifan-Ashati Unit No, 15 Jeddah **Tel.:** +966 12 268 7800 **E-mail:** info@savola.com **Website:** www.savola.com

Almarai

Activities	Production, processing, distribution, import, export
Industry	Dairy, meat, confectionery, ready-to-eat products, beverages
Description	Saudi multinational food company, which is listed on the Tadawul Stock Exchange, was founded in 1977. It specializes in the manufacturing and distribution of food products, including dairy, meat and poultry products, confectionery, and soft drinks. The company's HQ is located in Riyadh (Saudi Arabia). Its products are supplied to the markets of the Middle East and Africa, to more than 42 million consumers. The company puts special emphasis on sustainable production methods and a quality control system. Its products are supplied to more than 220 thousand retail outlets. In 2022-2023 the company's revenue amounted to 5.2 billion US dollars
Contact Information	**Address:** 56CW+X33 Almarai company Saudi Arabia West - Al Quoz - Al Quoz 1 **Tel.:** +966 11 470 0005 **E-mail:** headoffice@almaraigroup.com **Website:** www.almarai.com

[10] According to the Fortune 500 Arabia rating: https://fortunearabia.com/en/Home/Fortune-500-Arabia

Saudia Dairy and Foodstuff Company (SADAFCO)

Activities	Production, processing, distribution, import, export
Industry	Dairy, ready-to-eat products, drinks
Description	Founded in 1976, the company has become a leading food manufacturer and distributor operating throughout the Middle East. It is the market leader in shelf-stable milk, tomato paste and ice cream in Saudi Arabia, selling its core products under its flagship brand Saudia. The company's product range also includes snacks, sauces and dressings, plant-based alternatives of dairy products, and by and large there are more than 124 SKU. It operates 3 factories, 23 warehouses and a fleet of 1 thousand vehicles. The company's products are supplied to all countries of the Middle East and some countries in Africa. In 2022-2023 the company's revenue amounted to 0.7 billion US dollars
Contact Information	**Address:** PO Box 5043, Jeddah **Tel.:** +966 12 629 3370 **E-mail:** sadafco@sadafco.com **Website:** www.sadafco.com

National Agricultural Development Company (NADEC)

Activities	Production, processing, distribution, import, export
Industry	Dairy, ready-to-eat products, drinks
Description	Founded in 1981, NADEC is one of Saudi Arabia's largest national companies, specializing in the production of dairy products, beverages and bottled olive oil. NADEC's head office is located in Riyadh. The company owns more than 6 dairy farms with a total population of 94 thousand cows, three modern factories with an overall production capacity of 1.5 million liters of milk and juice per day, as well as 38 warehouses and distribution centers. The company's products are supplied to most countries in the Middle East and North Africa. To manufacture products, the company uses the latest innovative technologies, and also conducts more than 13 thousand tests for quality control on a daily basis. In 2022-2023 the company's revenue amounted to 0.71 billion US dollars
Contact Information	**Address:** NADEC Building, Al Muraba, South of Crowne Plaza Riyadh Palace South of Crowne Plaza Riyadh, P.O. Box 2557 Riyadh **Tel.:** +966 11 202 7777 **E-mail:** info@nadec.com.sa **Website:** https://nadec.com

Tanmiah Food Company

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	Founded in 1962, over more than 60 years this Saudi agribusiness company has become one of the leading poultry producers in the Middle East. Its activities include poultry farming, production and processing of poultry meat and eggs, marketing and distribution (the company is one of the biggest suppliers of chicken meat products to the hotel and restaurant sector), as well as foreign trade. The Tanmiah division that is in charge of value-added food products produces ready-to-eat poultry, turkey and beef products. Tanmiah is a leading supplier of poultry and ready-to-eat meat products not only to the domestic Saudi Arabian market, but also to foreign countries. Its products, which are widely recognized for their high quality and compliance with all modern standards, are shipped to the markets of the Middle East and Africa. In 2022-2023 the company's revenue amounted to 0.71 billion US dollars
Contact Information	**Address:** Ahmad Ibn Ghalib, Ar Rabwah, Riyadh **Tel.:** +966 800 124 9898 **E-mail:** info@tanmiah.com **Website:** https://tanmiah.com

Herfy Food Services Co.

Activities	Production, distribution, import, export
Industry	Ready-to-eat products
Description	A major Saudi Arabian company specializing in the manufacturing and distribution of products for fast-food sector it was founded in 1981 and since then it has become one of the leading players in the food service industry in the country. Its activities also include managing a fast-food restaurant chain, offering a wide range of dishes such as burgers, sandwiches, pizza, etc. The company is a major manufacturer and exporter of ready-to-eat meat products and semi-finished products, as well as bakery products, operating its own production facilities. Herfy Food Services Co. also offers franchising opportunities for entrepreneurs willing to open their own restaurants under the Herfy brand. In 2022-2023 the company's revenue amounted to 350 million US dollars
Contact Information	**Address:** Building No: 2586, Dirar ibn al khattab – Al muruj, Unit No: 2 **Tel.:** +966 11 450 9767 **Website:** www.herfy.com

Balady Poultry Company

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	The company is a big regional producer of poultry meat and ready-to-eat meat products. Balady Poultry Trading Company is engaged in breeding and raising chickens, and it adheres to high standards in poultry management and care to ensure proper quality of meat. The company also manufactures a wide range of poultry products, including fresh and frozen meat and by-products, minced meat, and semi-finished products. Balady Poultry Trading Company actively promotes its products on the market and has its own distribution network that makes its products available in various regions of Saudi Arabia. In 2022-2023 the company's revenue amounted to 171 million US dollars
Contact Information	**Address:** 62952 Main Road, Khamis, Mushayt, Wadi Bin Hashbal **Tel.:** +966 92 003 5184 **E-mail:** info@balady-sa.com **Website:** https://balady-sa.com

First Mills

Activities	Production, processing, distribution
Industry	Grain, animal feed
Description	Established in 2017 as a result of the privatization of the General Food Security Authority (GFSA), First Mills is one of Saudi Arabia's strategic enterprises. The company is a leading flour milling player on the Kingdom's market introducing innovative solutions for the production of the highest quality flour, animal feed and bran. It covers all major regions of the country with four strategically located large factories in Jeddah, Qassim, Tabuk and Al Ahsa. In 2022-2023 the company's revenue amounted to 257 million US dollars
Contact Information	**Address:** Jeddah Islamic Port 22312, beside Sugar Factory Jeddah Saudi Arabia **Tel.:** +966 92 003 5184 **E-mail:** info@firstmills.com **Website:** www.firstmills.com

Arabian Agricultural Services Company (ARASCO)

Activities	Production, processing, distribution, import, export
Industry	Grain, meat, animal feed, food ingredients
Description	Founded in 1983, the mixed fodder enterprise l is one of Saudi Arabia's top 100 companies and one of the biggest national food companies in the Gulf. As one of the largest agri-food conglomerates, the company operates 6 subsidiaries, which cover feed production, poultry farming and poultry meat production, advanced grain processing and food ingredients production, consulting and marketing, logistics and distribution. ARASCO plays an important role in the development of agriculture in Saudi Arabia and the region as a whole, ensuring a stable supply of quality food products to consumers, and also makes a huge contribution to the livestock industry in the region
Contact Information	**Address:** Central Region, Riyadh ARASCO Building Prince Sultan Ibn Abdul Aziz St. PO Box: 53845, Riyadh **Tel.:** +966 11 261 2222 **E-mail:** info@arasco.com **Website:** www.arasco.com

Al Rabie Saudi Foods Company

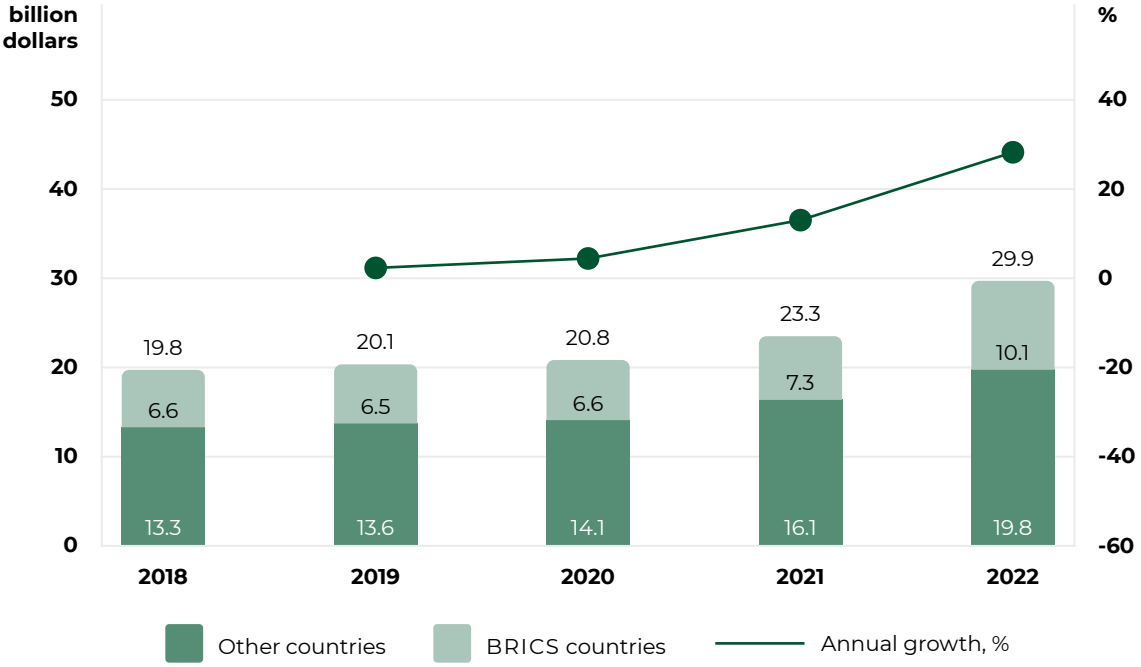
Activities	Production, distribution, import, export
Industry	Dairy, drinks, ready-to-eat products
Description	One of the largest juice companies in the Middle East which was founded in 1979 in Riyadh and became one of the first companies producing dairy products, juices and sauces in Saudi Arabia. For more than 30 years the company has created one of the most developed distribution networks, which covers the entire region. Since its inception, Al Rabie Saudi Foods Company has strived to apply the concept of integrated quality and service by opening a high-tech plant, launching production and establishing distribution networks to ensure availability of products throughout the Kingdom, as well as export tothe Middle East region and other countries
Contact Information	**Address:** P.O. Box 42787, Riyadh **Tel.:** +966 11 498 0000 **E-mail:** social@alrabie.com **Website:** www.alrabie.com

2.7.3. Foreign trade in agricultural products

2.7.3.1. Import of agricultural products

In 2022 Saudi Arabia's import of agricultural products amounted to 29.9 billion US dollars, which is 28.0% (+6.5 billion US dollars) higher than in 2021. In 2022 import from the BRICS countries increased by 39.4% (+2.9 billion US dollars) compared to the previous year, while import from other countries grew by 22.9% (+3.7 billion US dollars). Volume of import of agro-industrial products in 2018-2022 rose by an average of 10.8% per year.

Import of agricultural products of Saudi Arabia, 2018-2022, billion US dollars



Source: ITC Trade Map

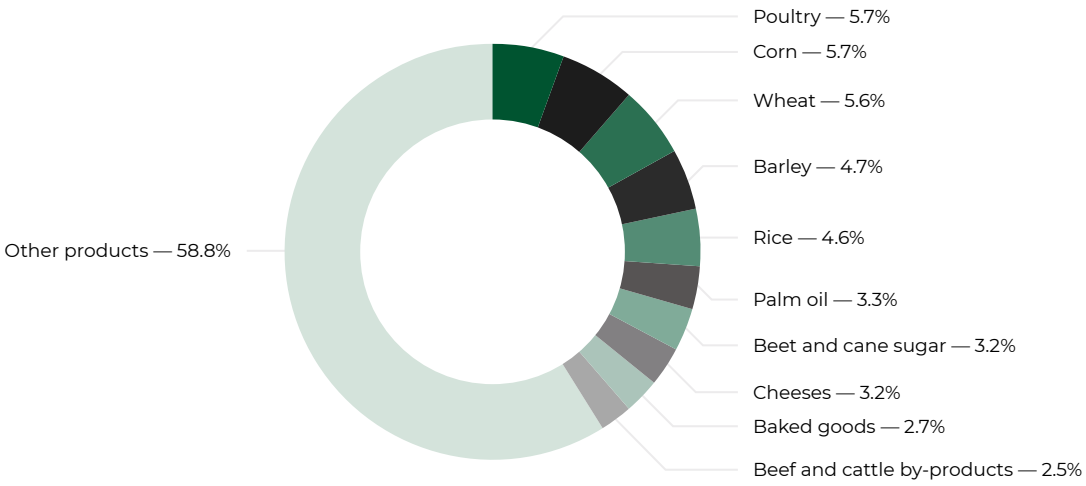
The structure of Saudi Arabia’s import of agricultural products is quite diversified. At the end of 2022 it was dominated by poultry (5.7% of import value), as well as grain crops — corn (5.7%), wheat (5.6%), barley (4.7%) and rice (4.6%). In total the top 10 commodity items accounted for 41.2% of Saudi Arabia's import of agro-industrial products in value terms.

Import structure of Saudi Arabian agricultural products in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Poultry	1,217.8	1,302.3	1,125.2	1,186.5	1,703.6	517.1	43.6
2	Corn	640.9	715.3	654.2	909.4	1,700.6	791.1	87.0
3	Wheat	222.9	123.5	194.1	703.4	1,662.0	958.6	136.3
4	Barley	1,032.6	541.8	616.1	1,458.4	1,401.2	-57.2	-3.9
5	Rice	1,314.7	1,415.1	1,404.2	1,095.0	1,388.0	293.0	26.8
6	Palm oil	307.9	337.4	309.1	665.9	991.7	325.8	48.9
7	Beet and cane sugar	506.3	425.4	490.0	728.0	945.9	217.9	29.9
8	Cheeses	625.9	660.5	683.3	729.7	942.6	212.9	29.2
9	Baked goods	633.0	670.9	668.7	727.7	816.9	89.1	12.2
10	Beef and cattle by-products	417.1	475.1	536.7	657.5	744.1	86.5	13.2
	Other products	12,919.7	13,459.0	14,090.8	14,479.3	17,582.5	3,103.3	21.4
	Total	**19,838.9**	**20,126.3**	**20,772.4**	**23,340.9**	**29,879.0**	**6,538.2**	**28.0**

Source: ITC Trade Map

Import structure of Saudi Arabian agricultural products in value terms, 2022, %



Source: ITC Trade Map

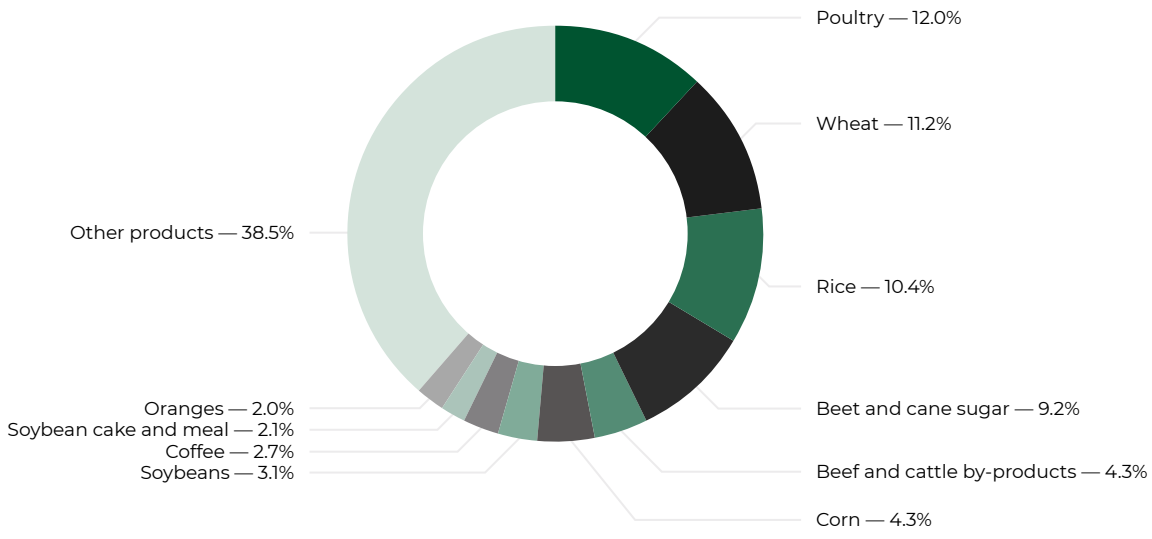
At the end of 2022 the structure of Saudi Arabia's import from the BRICS countries was dominated by poultry (12.0% of import value), wheat (11.2%), rice (10.4%), as well as beet and cane sugar (9.2%). In total the top 10 commodity items accounted for 61.5% of Saudi Arabia's import of agro-industrial products from the BRICS countries in value terms.

Import structure of Saudi Arabian agricultural products from the BRICS countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Poultry	992.8	1,040.7	858.2	843.9	1,215.3	371.4	44.0
2	Wheat	—	0.0	31.2	158.7	1,133.7	974.9	614.2
3	Rice	1,043.1	1,117.9	1,111.7	846.1	1,050.1	204.1	24.1
4	Beet and cane sugar	432.2	391.2	465.6	708.4	933.7	225.3	31.8
5	Beef and cattle by-products	265.2	280.7	319.7	391.9	439.8	47.9	12.2
6	Corn	67.4	142.9	125.2	158.7	432.9	274.2	172.8
7	Soybeans	137.0	127.9	122.0	251.3	318.2	66.9	26.6
8	Coffee	153.4	160.1	163.6	206.3	271.4	65.2	31.6
9	Soybean cake and meal	79.9	14.8	12.2	70.3	216.1	145.8	207.5
10	Oranges	179.3	173.3	188.4	210.0	205.7	-4.3	-2.0
	Other products	3,233.2	3,055.9	3,230.8	3,410.6	3,899.1	488.5	14.3
	Total	**6,583.6**	**6,505.2**	**6,628.6**	**7,256.1**	**10,116.1**	**2,860.0**	**39.4**

Source: ITC Trade Map

Import structure of Saudi Arabian agricultural products from the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

The structure of Saudi Arabia's import from other countries is also highly diversified. In 2022 the main agro-industrial products purchased on these markets were corn (6.4% of import value), barley (6.1%), palm oil (5.0%) and cheeses (4.4%).

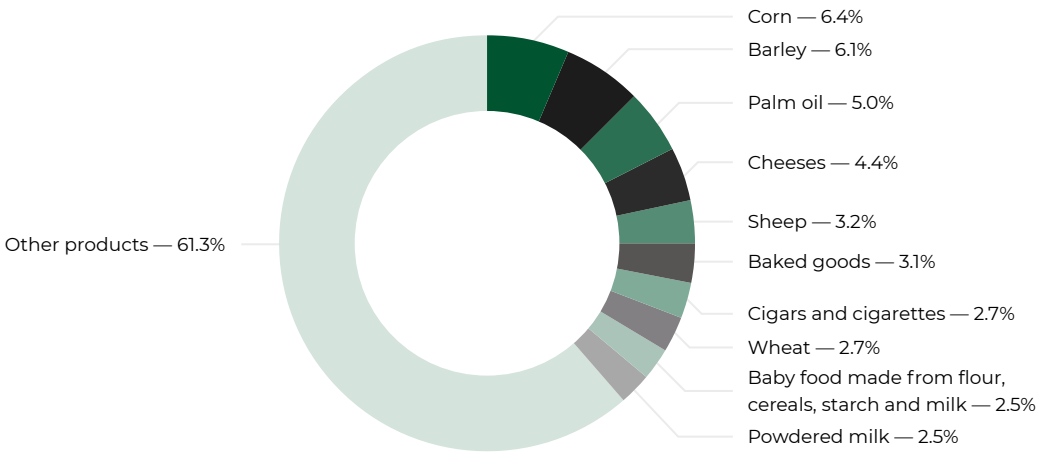
In total the top 10 commodity items accounted for 38.7% of Saudi Arabia's import of agricultural products from other countries in value terms.

Import structure of Saudi Arabian agricultural products from the other countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Corn	573.5	572.4	529.0	750.7	1,267.6	516.9	68.9
2	Barley	759.2	447.5	406.3	1,189.2	1,214.6	25.4	2.1
3	Palm oil	285.5	294.5	259.0	627.5	988.5	361.0	57.5
4	Cheeses	555.0	604.7	613.7	660.2	862.7	202.5	30.7
5	Sheep	518.1	565.8	420.2	464.4	641.5	177.1	38.1
6	Baked goods	498.4	527.8	525.4	557.4	611.6	54.2	9.7
7	Cigars and cigarettes	419.9	500.3	541.5	569.8	542.9	-26.9	-4.7
8	Wheat	222.9	123.4	162.8	544.7	528.3	-16.4	-3.0
9	Baby food made from flour, cereals, starch and milk	508.7	579.1	560.8	494.0	491.4	-2.6	-0.5
10	Powdered milk	316.7	304.7	404.6	309.5	491.3	181.8	58.7
	Other products	8,597.6	9,100.9	9,720.4	9,917.3	12,122.5	2,205.2	22.2
	Total	**13,255.3**	**13,621.1**	**14,143.8**	**16,084.8**	**19,762.9**	**3,678.2**	**22.9**

Source: ITC Trade Map

Import structure of Saudi Arabian agricultural products from the other countries in value terms, 2022, %



Source: ITC Trade Map

The BRICS countries provide about a third of Saudi Arabia's total import of agro-industrial products in value terms (33.9% in 2022). Among the countries of the association the largest exporters of agricultural products were Brazil (10.7% of import in value terms), India (7.4%), Russia (4.8%), the UAE (4.1%) and Egypt (3.5%) — these countries accounted for 90.4% of Saudi Arabia's imports of agro-industrial products from the BRICS countries.

In 2022 major exporters of agricultural products comprised also the USA (5.7% of import in value terms), Australia (5.3%) and Argentina (5.3%).

The main countries exporting agricultural products to Saudi Arabia in value terms, 2018–2022, million US dollars

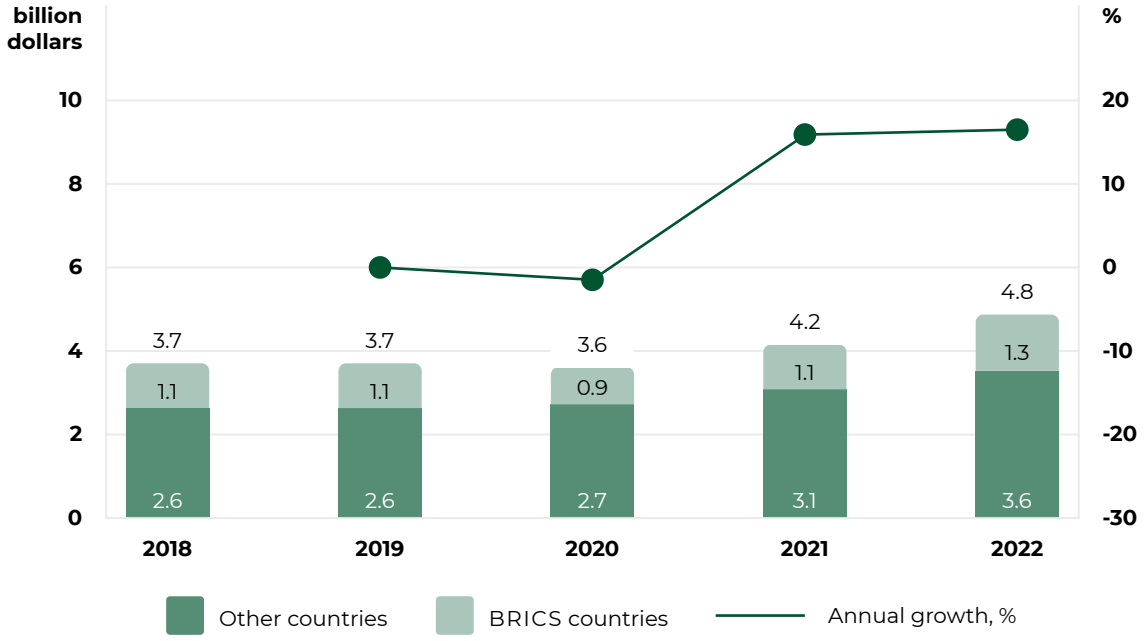
№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Brazil	1,832.0	1,811.5	1,773.5	2,060.4	3,203.5	1,143.1	55.5
2	India	1,697.4	1,754.8	1,698.3	1,711.0	2,197.6	486.6	28.4
3	Russia	379.8	251.1	377.2	665.2	1,446.5	781.2	117.4
4	UAE	1,341.1	1,310.3	1,256.3	1,165.7	1,237.3	71.6	6.1
5	Egypt	647.7	627.9	711.3	831.8	1,060.3	228.5	27.5
6	China	292.3	321.5	365.2	315.9	418.9	103.1	32.6
7	Ethiopia	185.7	199.5	196.1	229.0	286.5	57.5	25.1
8	South Africa	207.6	228.6	250.8	277.1	265.5	-11.6	-4.2
	Total BRICS	**6,583.6**	**6,505.2**	**6,628.6**	**7,256.1**	**10,116.1**	**2,860.0**	**39.4**
1	USA	1,647.1	1,469.4	1,440.6	1,489.6	1,711.9	222.3	14.9
2	Australia	319.6	330.7	319.7	1,292.0	1,570.9	278.9	21.6
3	Argentina	700.1	1,057.8	843.1	1,011.2	1,569.2	558.0	55.2
4	Malaysia	398.3	273.6	397.9	590.6	906.7	316.1	53.5
5	Germany	591.0	517.1	518.1	532.1	777.1	245.0	46.0
6	Indonesia	339.2	490.3	381.3	524.5	774.6	250.1	47.7
7	Spain	446.2	449.7	613.8	673.0	766.4	93.4	13.9
8	Jordan	192.7	215.3	456.6	537.2	721.3	184.1	34.3
9	Poland	232.2	268.0	528.1	825.0	706.9	-118.1	-14.3
10	Netherlands	531.7	580.4	590.7	684.3	705.4	21.1	3.1
	Other countries	7,857.1	7,968.8	8,053.9	7,925.4	9,552.5	1,627.2	20.5
	Total non-BRICS	**13,255.3**	**13,621.1**	**14,143.8**	**16,084.8**	**19,762.9**	**3,678.2**	**22.9**
	Total	**19,838.9**	**20,126.3**	**20,772.4**	**23,340.9**	**29,879.0**	**6,538.2**	**28.0**

Source: ITC Trade Map

2.7.3.2. Export of agricultural products

In 2022 Saudi Arabia's export of agro-industrial products amounted to 4.8 billion US dollars, which is 16.2% (+0.7 billion US dollars) higher than in 2021. In 2022 export to the BRICS countries increased by 18.0% (+0.2 billion US dollars) compared to the previous year, while export to other countries grew by 15.5% (+0.5 billion US dollars). In 2018-2022 Saudi Arabia's export of agro-industrial products rose at an average annual rate of 7.2%.

Export of agricultural products of Saudi Arabia, 2018–2022, billion US dollars



Source: ITC Trade Map

In 2022 the main Saudi Arabian agricultural export-oriented products comprised beet and sugar cane (9.2%), baked goods (8.5%), dates (7.1%), cheeses (7.0%) and pasta (6.3%). In total the top 10 exported products accounted for 60.9% of Saudi Arabian agricultural export by value.

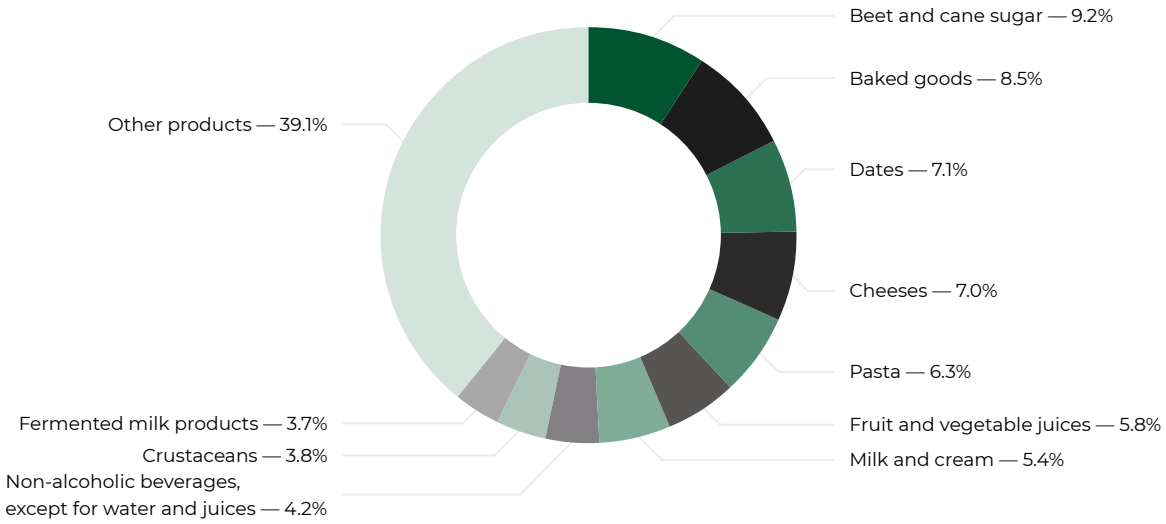
Export structure of Saudi Arabian agricultural products in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Beet and cane sugar	153.2	165.2	164.2	271.0	443.2	172.2	63.6
2	Baked goods	288.6	327.7	333.2	383.1	410.0	27.0	7.0
3	Dates	201.4	230.7	247.2	324.6	341.5	17.0	5.2
4	Cheeses	309.4	328.1	344.2	313.2	337.4	24.2	7.7

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
5	Pasta	128.7	165.5	195.5	248.7	303.3	54.5	21.9
6	Fruit and vegetable juices	346.3	328.8	273.3	288.3	278.7	-9.6	-3.3
7	Milk and cream	167.5	211.2	192.9	245.0	261.9	16.9	6.9
8	Non-alcoholic beverages, except for water and juices	129.0	144.8	173.5	194.5	203.9	9.3	4.8
9	Crustaceans	268.0	126.2	63.7	114.1	185.8	71.7	62.9
10	Fermented milk products	238.1	232.6	150.8	163.3	179.5	16.2	9.9
	Other products	1,432.1	1,407.7	1,460.8	1,615.6	1,889.1	273.5	16.9
	Total	**3,662.3**	**3,668.4**	**3,599.3**	**4,161.3**	**4,834.3**	**673.0**	**16.2**

Source: ITC Trade Map

Export structure of Saudi Arabian agricultural products in value terms, 2022, %



Source: ITC Trade Map

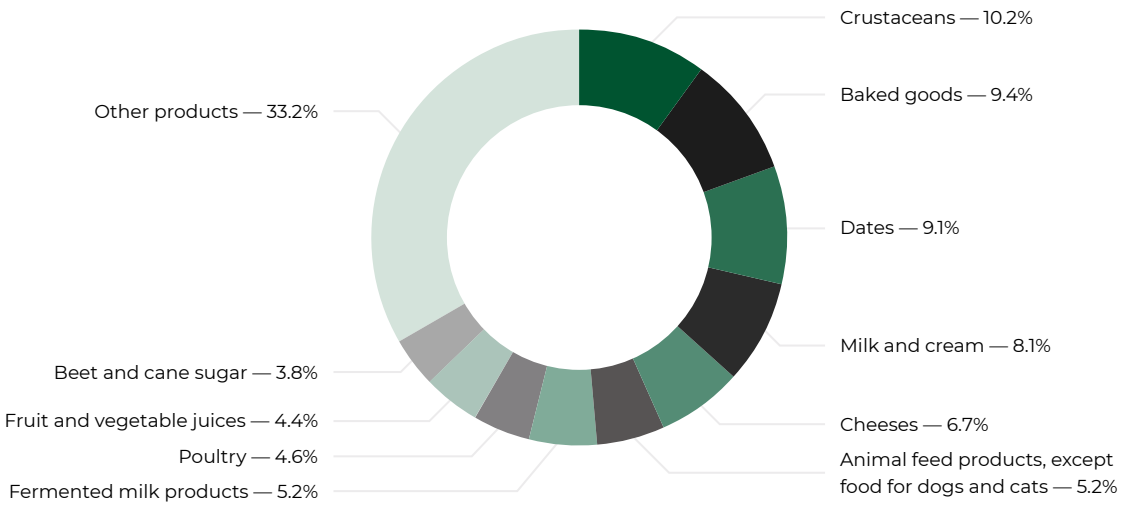
In 2022 the structure of Saudi Arabian agro-industrial export to the BRICS countries was dominated by crustaceans (10.2%), baked goods (9.4%), dates (9.1%), milk and cream (8.1%) and cheeses (6.7%). In total the top 10 exported products accounted for 66.8% of Saudi Arabian agro-industrial export by value.

Export structure of Saudi Arabian agricultural products to the BRICS countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Crustaceans	141.4	95.7	45.7	89.7	130.5	40.7	45.4
2	Baked goods	93.8	101.4	96.6	121.6	120.9	-0.7	-0.6
3	Dates	60.8	81.9	71.0	110.1	116.8	6.8	6.1
4	Milk and cream	70.3	69.5	50.6	64.6	104.0	39.4	61.0
5	Cheeses	78.4	103.2	85.6	83.1	85.5	2.5	3.0
6	Animal feed products, except food for dogs and cats	2.3	2.8	2.1	3.5	67.1	63.6	1,811.0
7	Fermented milk products	72.8	72.6	46.0	58.1	66.3	8.2	14.1
8	Poultry	59.5	71.8	55.5	59.5	59.4	-0.1	-0.2
9	Fruit and vegetable juices	85.4	76.2	72.6	71.8	56.5	-15.3	-21.4
10	Beet and cane sugar	8.9	9.9	11.2	18.2	48.5	30.2	165.8
	Other products	377.8	384.1	369.8	405.8	425.6	19.8	4.9
	Total	**1,051.4**	**1,068.9**	**906.8**	**1,086.0**	**1,281.1**	**195.1**	**18.0**

Source: ITC Trade Map

Export structure of Saudi Arabian agricultural products to the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

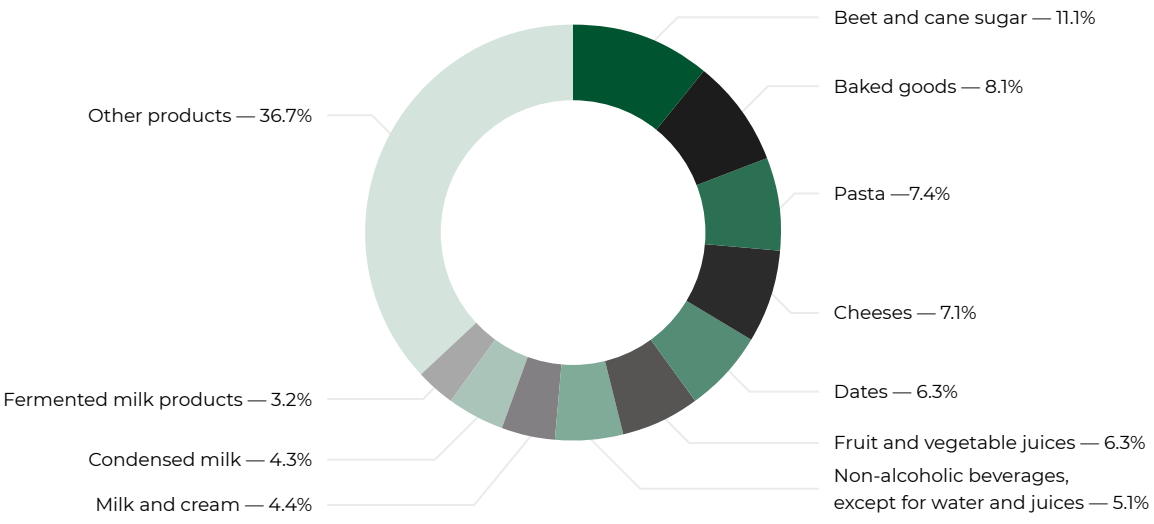
In 2022 the structure of Saudi Arabia's agro-industrial export to other countries was dominated by beet and cane sugar (11.1%), baked goods (8.1%), pasta (7.4%), cheeses (7.1%) and dates (6.3%). In total the top 10 exported products accounted for 63.3% of Saudi Arabia's agro-industrial export by value.

Export structure of Saudi Arabian agricultural products to the other countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollaras	%
1	Beet and cane sugar	144.3	155.3	152.9	252.8	394.8	142.0	56.2
2	Baked goods	194.8	226.2	236.6	261.4	289.2	27.7	10.6
3	Pasta	101.9	135.6	161.2	213.1	262.9	49.8	23.4
4	Cheeses	231.0	225.0	258.6	230.2	251.8	21.7	9.4
5	Dates	140.6	148.8	176.2	214.5	224.7	10.2	4.8
6	Fruit and vegetable juices	260.9	252.6	200.7	216.5	222.3	5.7	2.7
7	Non-alcoholic beverages, except for water and juices	123.8	135.1	161.9	173.9	181.2	7.2	4.2
8	Milk and cream	97.2	141.7	142.3	180.3	157.8	-22.5	-12.5
9	Condensed milk	160.5	164.4	198.1	142.7	151.8	9.1	6.4
10	Fermented milk products	165.3	160.0	104.8	105.2	113.3	8.0	7.6
	Other products	990.7	854.8	899.1	1,084.6	1,303.6	218.9	20.2
	Total	**2,610.9**	**2,599.5**	**2,692.4**	**3,075.3**	**3,553.2**	**477.9**	**15.5**

Source: ITC Trade Map

Export structure of Saudi Arabian agricultural products to the other countries in value terms, 2022, %



Source: ITC Trade Map

The BRICS countries purchase about a quarter of Saudi Arabia's total export of agro-industrial products in value terms (26.5% in 2022). Among the countries of the association the largest importers of agricultural products were the UAE (21.8% of export in value terms).

Kuwait (13.4% of export in value terms), Jordan (12.0%) and Yemen (10.4%) also became major importers of agricultural products from Saudi Arabia in 2022.

The main importing countries of agricultural products from Saudi Arabia in value terms, 2018-2022, million US dollars

№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	UAE	827.3	887.5	783.8	893.6	1,055.1	161.5	18.1
2	China	136.0	81.8	27.8	64.1	130.1	66.0	102.9
3	Egypt	46.4	52.9	73.2	86.6	62.0	-24.6	-28.4
4	India	31.7	25.5	13.5	24.8	23.1	-1.6	-6.6
5	South Africa	3.6	3.8	2.3	3.4	5.0	1.6	47.1
6	Russia	0.4	1.1	1.8	9.9	2.6	-7.3	-74.1
7	Ethiopia	3.3	6.9	4.0	3.4	1.7	-1.7	-49.4
8	Brazil	2.8	9.3	0.4	0.3	1.5	1.2	347.2
	Total BRICS	**1,051.4**	**1,068.9**	**906.8**	**1,086.0**	**1,281.1**	**195.1**	**18.0**
1	Kuwait	574.8	553.0	601.4	612.2	649.1	36.9	6.0
2	Jordan	319.1	348.0	376.6	480.2	580.3	100.1	20.8
3	Yemen	256.7	335.8	348.9	433.9	504.8	70.9	16.3
4	Bahrain	321.6	302.2	302.1	334.4	354.9	20.6	6.2
5	Oman	300.2	322.3	290.3	259.9	301.6	41.7	16.1
6	Iraq	176.6	188.2	211.8	222.6	280.4	57.8	26.0
7	Netherlands	40.7	47.3	53.4	80.7	113.6	32.9	40.8
8	Türkiye	30.0	29.9	20.8	24.2	95.9	71.7	296.8
9	Palestine	12.1	15.0	20.2	35.2	72.9	37.7	107.1
10	Bangladesh	15.0	15.6	47.9	43.0	62.0	19.0	44.2
	Other countries	564.2	442.3	418.9	549.1	537.7	-11.4	-2.1
	Total non-BRICS	**2,610.9**	**2,599.5**	**2,692.4**	**3,075.3**	**3,553.2**	**477.9**	**15.5**
	Total	**3,662.3**	**3,668.4**	**3,599.3**	**4,161.3**	**4,834.3**	**673.0**	**16.2**

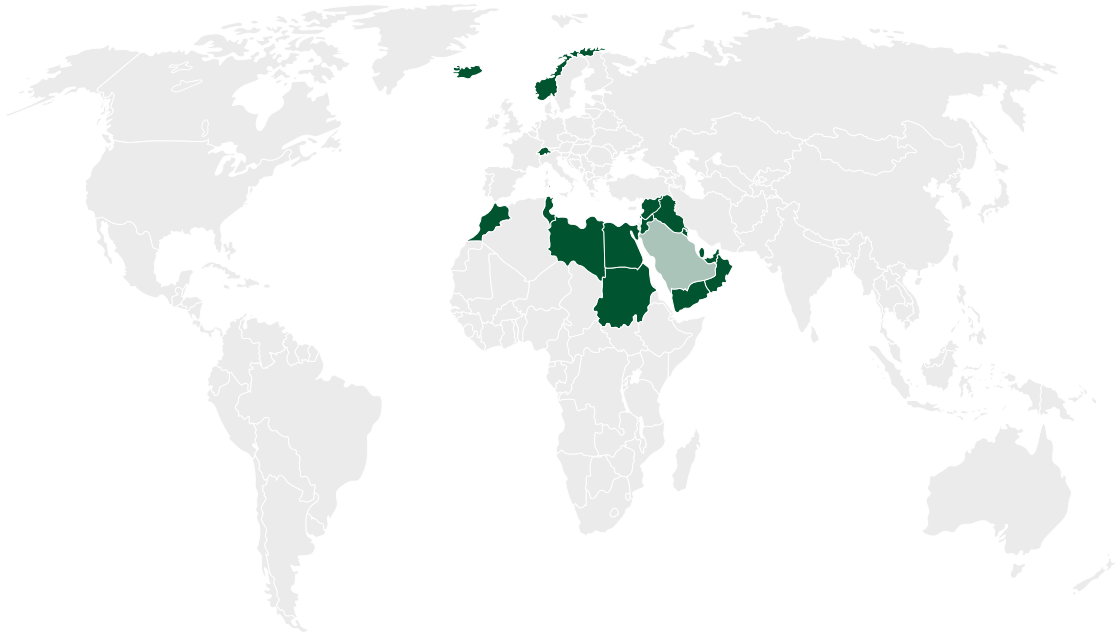
Source: ITC Trade Map

2.7.3.3. International cooperation

The Kingdom of Saudi Arabia is a member of the League of Arab States and the Cooperation Council for the Arab States of the Gulf (GCC).

The main goals of the GCC, as set out in its Charter, also include coordination in order to achieve unity among member states, stimulating scientific and technological progress and standardization (establishing common rules and requirements applicable to food products for all participants).

Saudi Arabia's trade agreements



State/association with which the Kingdom of Saudi Arabia has entered into a preferential trade agreement	Effective date of the agreement
GCC: Bahrain, Qatar, Kuwait, the UAE, Oman	1981
Pan-Arab Free Trade Zone: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Sudan, Syria, Tunisia, the UAE, Yemen	1998
EFTA: Iceland, Liechtenstein, Norway, Switzerland	2014

2.7.3.4. Special economic zones

There are 5 special economic zones (SEZs) in the KSA that support a wide range of industries and are located in Riyadh, Jazan, Ras al-Khair and King Abdullah Economic City.

SEZs in the KSA have specific goals in various sectors of the economy. For example, due to its proximity to the Red Sea and potential for maritime activities, the Jazan Special Economic Zone (JSEZ) is well positioned to stimulate growth in logistics and trade. This Saudi special free zone seeks to leverage its strategic location to facilitate international trade and improve the KSA's connectivity.

Meanwhile, today no separate SEZs have been established to strengthen the KSA's food security or modernize its agro-industrial complex.

2.7.3.5. Institutes for supporting the export of agricultural products

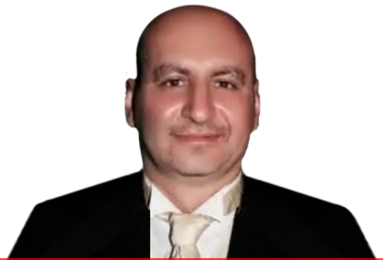
Saudi Export Development Authority

Description	The Saudi Export Development Authority is a government agency aimed at promoting products on foreign markets, increasing their competitiveness and raising export potential. Its activities cover all non-oil export of the country. The institute is also responsible for the implementation of the programme for the development of the national brand, Saudi Made. One of the areas of activity is the development of export of dates and date products. Authority's strategic partners comprise leading government bodies, government and public organizations functioning in the field of foreign economic activity
Main goals	• information and analytical support for national exporters; • promotion of exhibition activities; • implementation of programmes to stimulate non-oil export; • supporting exporters on issues of overcoming foreign trade barriers; • assessing the Saudi companies' readiness to export; • educational support for exporters, raising their competencies
Contact details	**Address:** Arcade Commercial Complex, Entrance #1, King Fahd Road, Olaya District, PO Box 75169, Riyadh **Tel.:** +966 92 000 7355 **E-mail:** CC@saudiexports.sa **Website:** https://www.saudiexports.gov.sa/en

Export-Import Bank of Saudi Arabia
(SaudiEXIM Bank)

Description	The Export-Import Bank of Saudi Arabia is an institute supporting Saudi non-oil export, which seeks to provide export financing solutions, guarantees and export risk insurance. Bank's clients comprise more than 30 largest exporters of the country, including agricultural producers such as Almarai, Nada Dairy Altaleb Group and others. Bank's partners are leading investment funds and commercial banks of the KSA, as well as Export-Import banks of India, Nigeria, Thailand and other countries
Main goals	• lending to importers of Saudi products; • providing loans to exporting companies to expand their activities; • optimization of settlements for foreign trade transactions; • structural financing of international projects that promote the development of export of Saudi goods and services; • export credit insurance; • performance guarantee insurance for export contracts; • providing bank guarantees for participation in international tenders
Contact details	**Address:** Shari' al-Takhassusi, Al Muhammadiyah, Riyadh **Tel.:** +966 800 433 3330 **E-mail:** info@saudiexim.gov.sa **Website:** https://saudiexim.gov.sa/en

Expert opinion



Usama Al Malki

Chief Operating Officer, Eurasia Gulf

"The United Arab Emirates is an attractive market for food suppliers from all over the world. Due to unfavorable natural and climatic conditions such as aridity of the local climate, high average annual temperature, lack of water resources and, as a result, lack of sufficient land suitable for farming, the UAE has to import significant volumes of agricultural products. Nevertheless, the country is actively developing agriculture, with a particular focus on building advanced agricultural infrastructure and achieving sustainable development goals.

The promising categories for localization in the UAE are Halal food such as Halal meat, snacks, and ready-to-eat meals, which could be a lucrative opportunity, organic food which is increasing, healthy snack food products, ethnic food considering that there are residents from more than 180 countries living in the UAE and dates related products.

International co-operation and partnership with other countries, including agricultural collaboration is particularly important for the country.

The enlargement of BRICS is of strategic importance for all member countries, as it will strengthen multilateral co-operation among member countries in the agricultural sector, including food security. To this end, it is necessary to work out a common strategy aimed at developing international partnerships to diversify food sources, developing standards and legislation in the agro-industrial sector to improve nutrition and reduce waste.

An important course of action of the association is to achieve sustainable economic management and efficient use of natural resources, promoting a circular economy and a sustainable consumption and production model that will reduce the burden on the environment and meet the basic needs of the population."

2.8. United Arab Emirates

2.8.1. Social and economic profile

The United Arab Emirates (the UAE) is a federation of seven emirates and one of the most important economic centers in the Middle East. The country, whose population once depended on fishing and a declining pearling industry, is now a vibrant, internationally oriented trading and financial center on the shores of the Persian Gulf. The capital of the country, Abu Dhabi, is the government center of the UAE and the city of Dubai is the center of international business and tourism.

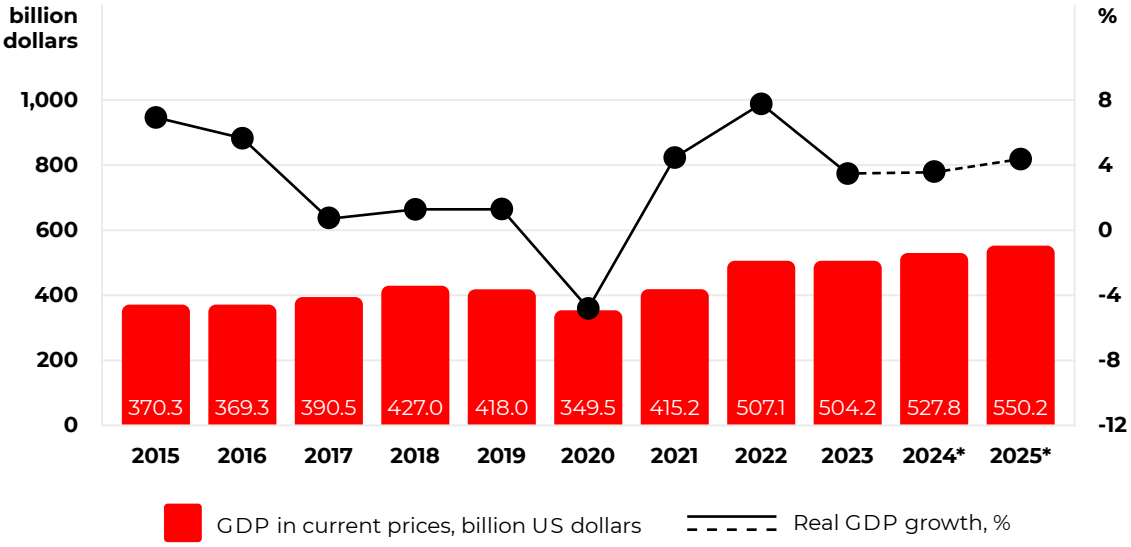
The country's population is 9.7 million people. The urbanization rate in 2022 reached 87.5%. In the structure of the UAE's GDP agriculture accounts for about 0.8%, while the industrial and service sectors account for 51.5% and 47.7%, respectively. About 1.4% of the population is employed in agriculture, 29.6% in industry and 69.0% in the service sector. The unemployment rate in the UAE as of 2022 was 3.0%.

In 2022 the UAE agricultural products import accounted for 5.7% of the total import of goods in value terms. Agricultural products export accounted for 3.6% of the country's total exports of goods.

According to the IMF, the GDP growth of the UAE was 7.9% in 2022. Despite the slowdown in GDP growth to 3.4% in 2023, the country's economic prospects remain positive, supported by increased economic activity, the continued implementation of structural reforms aimed at increasing investment attractiveness and diversifying the economy, the influx of investment in knowledge-intensive industries and the implementation of large-scale projects in Abu Dhabi and Dubai, fiscal support measures in these cities, high revenues from the oil sector, as well as the rapid rise of the tourism sector, which, along with government spending, will ensure non-oil GDP growth of 3.8%.

Over the medium term the UAE's economic growth is expected to be supported by structural reforms, as well as the promotion of Comprehensive Economic Partnership Agreements (CEPA) foreign policy, which will stimulate trade and integration into global value chains and help attract FDI.

Dynamics of the UAE GDP in current prices, 2015-2025

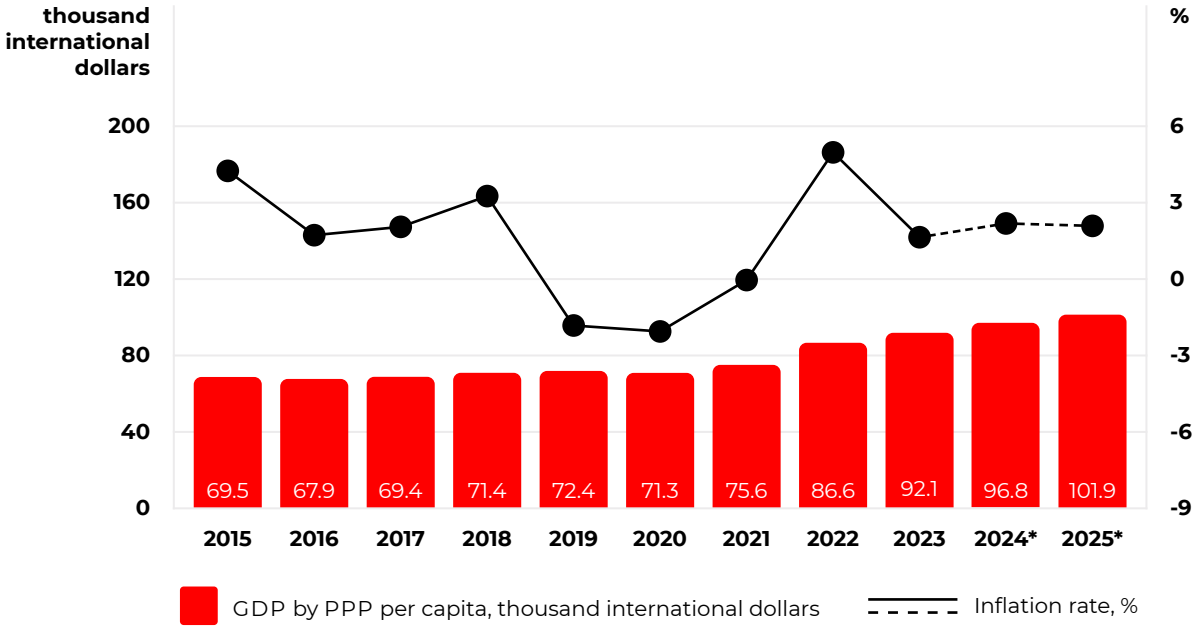


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

The UAE GDP by PPP per capita in 2023 amounted to 92.1 thousand international dollars. According to IMF forecasts in 2025 the figure may increase to 101.9 thousand international dollars. Inflation fell to 1.6% in 2023 after rising to 4.8% in 2022, driven by rising prices for real estate, consumer goods and fuel.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

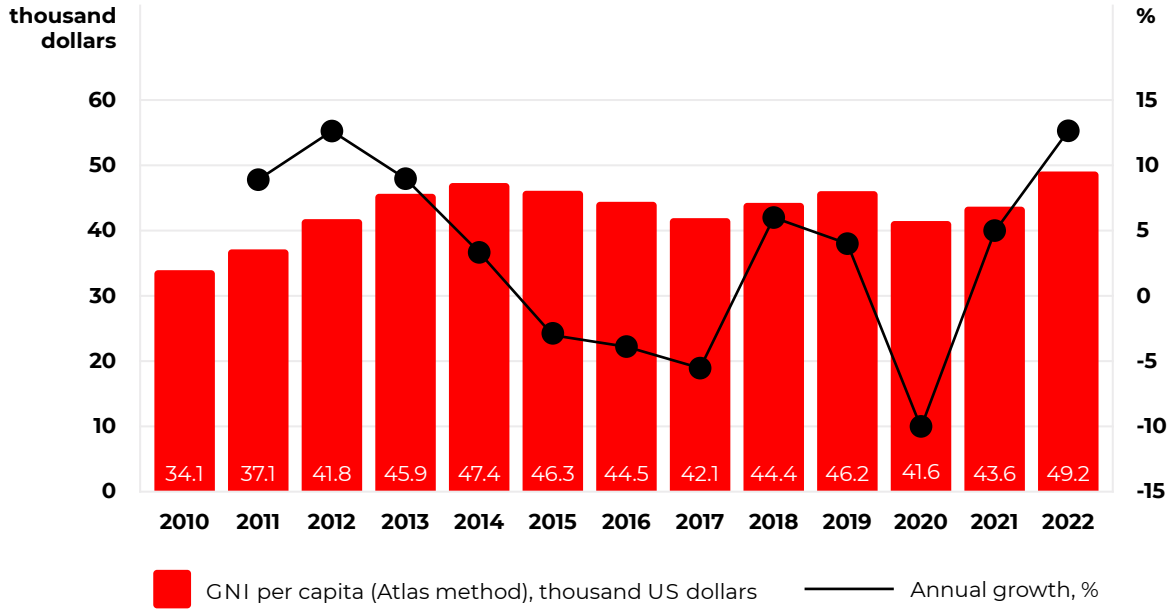


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, the UAE belongs to the group of high-income countries. In 2022 the UAE's GNI per capita amounted to 49.2 thousand US dollars, which is 12.8% higher than the previous year.

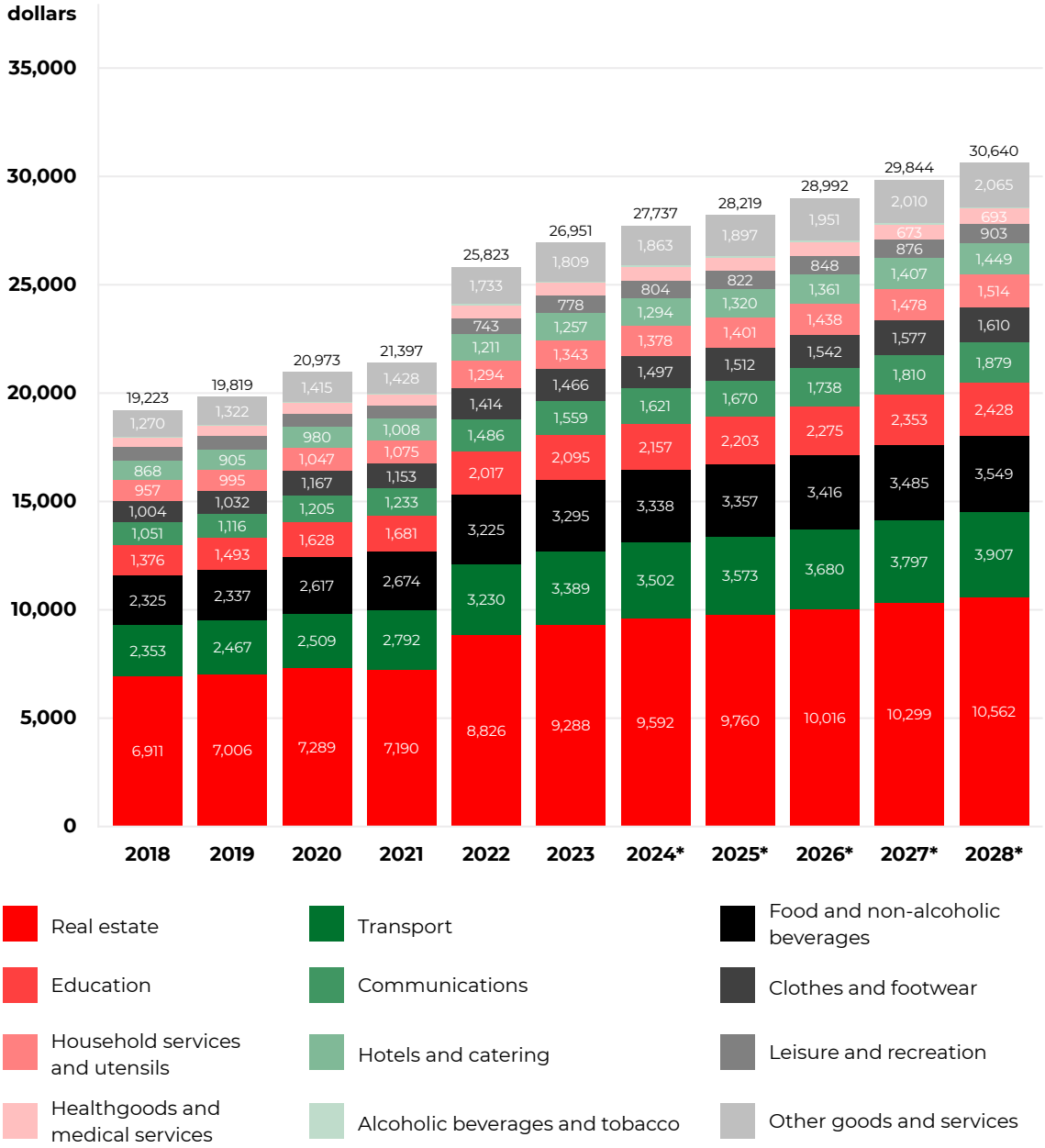
Dynamics of GNI per capita in the UAE, 2010-2022



Source: World Bank

Per capita final consumption expenditures in 2023 were 26,951 US dollars in constant 2023 prices that is 4.4% higher than in 2022. The majority of expenditures were on real estate — about 34.5%. Transport expenses accounted for 12.6% and ranked second in the structure of final consumption expenditures. Food and non-alcoholic beverage expenses were 3,295 US dollars (12.2%). In 2028 final consumption expenditures per capita are projected to reach 30,640 US dollars of which 3,549 US dollars will be spent on food and non-alcoholic beverages (11.6%).

Final consumption expenditures in the UAE per capita in constant prices 2023, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.8.2. Agriculture

2.8.2.1. Crop and livetsock production

Agriculture accounts for a small share of the country's GDP and employment structure which is due to the extremely unfavorable conditions for the development of this sector. Only a small part of the territory is suitable for agriculture due to the aridity of the local climate, high average annual temperatures, lack of water resources and poor soil quality. As a result, the UAE is highly dependent on agricultural import. Foreign supplies provide approximately 80% of food consumption. However, the state is actively involved in stimulating the development of the sector in order to strengthen the food security. In particular, efforts are being made to introduce modern irrigation infrastructure that would allow to use the avalible water resources more efficiently. Special attention is paid to the development of hydroponics, the use of which saves up to 70% of water while increasing the length of the growing season and does not require harmful chemicals. Moreover, the government provides financial support to farmers by providing subsidies for seeds, fertilizers and pesticides, as well as soft loans for the purchase of agricultural equipment and machinery.

The basis of the agricultural production in the UAE is the cultivation of dates. In 2022 the volume of production amounted to 351.4 thousand tons which is 8.3% less than in 2021. The cultivation of this crop has been one of the priority areas for the development of agriculture in the UAE since the 1970s. Dates are among the fruits most adapted to the arid climate of the Arabian Peninsula.

The active development of modern irrigation systems allows the country to also increase the production of various types of vegetables, such as cucumbers, tomatoes and cabbage. Production of cucumbers in 2022 amounted to 71.4 thousand tons, tomatoes — 78.6 thousand tons, cabbage — 14.1 thousand tons.

Production of crop products, thousand tons

	2018	2019	2020	2021	2022
Fruits	**369.0**	**400.6**	**395.0**	**382.6**	**376.3**
Dates	345.1	341.2	351.5	383.0	351.4
Citrus	8.1	12.8	15.1	7.0	7.0
Mango	11.6	9.3	9.3	4.1	4.1
Vegetables, roots and tubers	**328.2**	**339.4**	**336.6**	**300.3**	**246.5**
Cucumbers	105.8	114.3	105.8	91.9	71.4
Tomatoes	77.9	78.2	80.1	60.1	78.6
Cabbage	30.7	33.1	35.5	25.4	14.1
Corn	**21.4**	**23.5**	**26.4**	**26.1**	**8.2**

Source: FCSC UAE

The livestock sector plays an important role in ensuring the country's food security. In particular, production in the dairy farming segment has increased significantly over the past decade. The production of camel, goat and cow milk in 2022 amounted to 79.4 thousand tons, 76.9 thousand tons and 53.1 thousand tons, respectively.

The main types of meat produced in the UAE are goat meat (57.3 thousand tons in 2022), poultry meat (52.6 thousand tons) and camel meat (40.5 thousand tons). In 2022 the production volume of chicken eggs amounted to 1.17 billion pieces.

In 2022 fish and seafood production in the UAE, according to FAO estimates, amounted to 62.9 thousand tons. Aquaculture in the country is poorly developed and most production is provided by fishing. Fish in the UAE remains one of the most popular products. Since the UAE is a coastal state, fishing has always been a significant activity for the national economy. The state is also directly involved in the development of this industry. Local fishermen are provided with specialized machinery and equipment for fishing.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	1.16	1.13	1.19	1.20	1.17
Camel's milk, thousand tons	74.7	74.6	85.4	78.3	79.4
Goat's milk, thousand tons	73.0	73.2	81.6	75.9	76.9
Cow's milk, thousand tons	51.0	50.9	55.9	52.6	53.1
Goat, thousand tons	58.3	59.0	61.1	64.6	57.3
Poultry, thousand tons	47.3	44.9	54.1	46.5	52.6
Camel meat, thousand tons	34.2	34.9	38.9	39.2	40.5
Fish and seafood, thousand tons	67.0	65.9	62.0	63.9	62.9*

Source: FAOSTAT
*Note. *estimated.*

2.8.2.2. Overview of milestones in the agro-industrial complex

1960 Companies

Founding of the multi-industry conglomerate Al Ghurair, which includes the Al Ghurair Foods division — this company is one of the largest flour producers in the Middle East with a processing capacity of about 1.5 million tons of grain.

1964 Companies

Founding of the Kuwaiti company Americana Group, which is one of the leading food producers and meat processors in the Gulf region owning a processing facility in the UAE. Uses imported meat, mainly from Brazil and the USA. The Americana brand is known in the food service sector as well as in retail.

1971 New institutions

Establishment of the Abu Dhabi Development Fund (ADFD), providing concessional loans to finance economic and social development projects, including in the agricultural sector.

1972 Foreign policy

The UAE joins the International Monetary Fund (IMF).

1973 Foreign policy

The UAE joins the Food and Agriculture Organization of the United Nations (FAO).

1976 New institutions

Establishment of the Arab Authority for Agricultural Investment and Development (AAAID) in Dubai, an intergovernmental organization investing in agricultural projects in the Middle East and North Africa. 30 projects have already been implemented, 13 projects are in the process of implementation and another 12 are at the development stage. Distribution of investments by sub-sectors: 49% — production of plant products (sugar, vegetable oils), 25% — production of livestock products (meat, fish, eggs), 22% — crop production and another 4% falls on various services.

1981 Foreign policy

Signing in Abu Dhabi of an agreement establishing the Gulf Cooperation Council (GCC), the main purpose of which is coordination, cooperation and integration in economic, social and cultural issues.

1997 Companies

Abu company, the first oil extraction company in the emirate of Abu Dhabi, established Dhabi Vegetable Oil Co. LLC (ADVOC). ADVOC has an extensive portfolio of brands, including Coroli, LiteLife and Sarola, supplying domestic and export markets throughout the MENA region.

2004 Companies

Founding of Agthia Group which specializes in the food and beverage industry and is based in Abu Dhabi. Agthia Group is also engaged in trading of agricultural raw materials. The company manufactures and markets a wide range of products including water, protein, snacks, confectionery, frozen vegetables and pet food worldwide.

2010 Domestic policy

The UAE develops and initiates a comprehensive cross-sector strategy Vision 2021 aimed at developing the country's economy.

2013 Companies

Founding of Maraie Al Khaleej, a leader in lamb production in the UAE. Raises about 5 thousand lambs per year. It supplies meat mainly to the domestic market.

2018 Domestic policy

Launch of the UAE National Food Security Strategy 2051 with 5 strategic objectives aimed at facilitating global food trade, diversifying UAE import and creating alternative supply chains.

2019 New institutions

Establishment of the Abu Dhabi Agriculture and Food Safety Authority (ADAFSA), which is the local government authority responsible for agriculture, food safety, food security and biosecurity in the emirate of Abu Dhabi. In addition the authority is responsible for preparing plans, programs and activities in the field of agriculture, food safety and food security.

2021 Domestic policy

Approval of the circular economy policy (“Circular Eeconomy”) for 2021-2031 aimed at sustainable development and environmental protection.

2021 M&A

Acquisition by Arabian multinational Savola Group of vegetable oils manufacturer from the UAE. Bayara Holding Limited is a manufacturer of vegetable oils and a packer of nuts, spices, dried fruits, legumes and snacks. The transaction amount was 260 million US dollars. Acquisition by Arabian multinational Savola Group of vegetable oils manufacturer from the UAE. Bayara Holding Limited is a manufacturer of vegetable oils and a packer of nuts, spices, dried fruits, legumes and snacks. The transaction amount was 260 million US dollars.

2023 Foreign policy

Signing of Memorandums of Understanding between Pakistan and the UAE in the areas of energy, wastewater treatment, food security, logistics, minerals, and banking and financial services sectors. The memorandums envisage investment from the UAE in Pakistan in the amount of more than 20 billion US dollars for the development of agriculture, port and logistics infrastructure and energy.

2023 Domestic policy

The UAE has adopted a new Competition Law, amending the country's antitrust regulations, as well as the procedure for notifying the UAE Ministry of Economy of mergers and acquisitions. The new law replaces Federal Decree No. 4 of 2012 on competition regulation.

2023 Foreign policy

The Central Bank of the UAE and the Reserve Bank of India signed a Memorandum on the use of national currencies in mutual trade, as well as a Memorandum on the unification of the countries' payment systems and messaging systems. The signed memorandums are expected to help stimulate the use of local currencies (rupees and dirhams) for cross-border transactions, expanding access of the population and business to payment services.

2.8.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

The country has a National Food Security Strategy 2051. The UAE strives to achieve zero hunger among its population by ensuring access to safe, nutritious and sufficient food all year round. The strategy includes the adoption of sustainable agricultural practices that increase productivity and production and help maintain ecosystems.

In addition, the strategy aims to expand local production, develop international partnerships to diversify food sources, and develop standards and legislation to improve nutrition and reduce waste.

Development of high-tech production and deep processing

Emirates company Flight Catering, one of the world's largest catering businesses, is owned by Emirates Bustanica. Emirates Bustanica is the world's largest indoor vertical greens farm located near Al Maktoum International Airport in Dubai World Central. Bustanica's products are grown without pesticides or herbicides and are 100% pure, fresh and nutrient-rich. The farm offers a variety of salads, spinach, arugula, parsley and cabbage. The production capacity is 3 thousand tons of greens per day, while using 95% less water than in traditional agriculture. Bustanica 's work is based on modern technologies — machine learning, artificial intelligence and other patented know-how, as well as a highly specialized in-house team, which includes agronomy experts, engineers, horticulturists and plant scientists.

Minimizing production and consumption waste

The UAE has a Circular Economy Policy 2021-2031 approved by the government in 2021. The program aims to achieve sustainable economic management and efficient use of natural resources, promote a circular economy and sustainable consumption and production patterns that reduce environmental pressures and meet the basic needs of the population, encourage the private sector to switch to cleaner and more modern industrial production methods.

Consumption of healthy, functional and organic products

In November 2022 the UAE launched the National Nutrition Strategy 2022-2030, which aims to ensure a healthy lifestyle for all residents of the country. This is achieved by increasing nutrition awareness, ensuring people have access to nutritious food and promoting physical activity.

Demand for organic food and drinks is growing. In many retail outlets they have special departments where farm products, products with the Eco and Organic marks are presented. Against the backdrop of an increase in the incidence of diabetes, there remains a high demand for products with reduced sugar content and gluten-free.

E-commerce development

The country's government is actively developing a system of measures to support e-commerce which includes registration of electronic trading platforms in the Dubai Free Economic Zone CommerCity (DCC), integration into the EZDubai e-commerce system, as well as simplification of the licensing procedure for trading through social networks.

Development of the “Blue Economy” — fish and seafood

Fish and seafood catches in the UAE are declining amid increased government efforts to preserve and restore marine biodiversity, as well as the development of aquaculture production. The main aquaculture products are Indian shrimp, grouper, sturgeon, sea bream, Nile tilapia and sea bass.

The UAE's marine natural resources have been depleted due to overexploitation over the past few decades. The country's government has been studying this problem for several years and has taken a number of measures to correct the situation. The UAE's Sustainable Fisheries Program runs until 2030 and has three strategic objectives: reducing pressure on the fisheries sector, supporting research, developing and implementing aquaculture technologies, and restoring fisheries habitats, including coral reef habitats.

2.8.2.4. Key agricultural producers

The largest agricultural holdings in the UAE[11]

Agthia Group PJSC

Activities	Production, processing, distribution, import, export
Industry	Dairy, confectionery, ready-to-eat products, drinks
Description	A leading food and beverage company headquartered in Abu Dhabi. The company was founded in 2004 and is listed on the Abu Dhabi Securities Exchange (ADX). Agthia Group PJSC is part of ADQ, one of the region's largest holding companies with a broad portfolio of major businesses covering key sectors of the Abu Dhabi economy. The company's assets are located in the UAE, Saudi Arabia, Kuwait, Oman, Egypt, Turkey and Jordan. Agthia Group PJSC sells products in more than 45 countries. More than 11 thousand employees are engaged in the production, sales and marketing of various food products (drinks, snacks, confectionery, protein products and frozen vegetables, dairy products). For 2023 the company's revenue amounted to 1.2 billion US dollars
Contact Information	**Address:** Sky Tower, 17th Floor, Al Reem Island, P. O. Box 37725 Abu Dhabi **Tel.:** +971 2 596 0600 **Website:** www.agthia.com

Al Dahra

Activities	Production, processing, distribution, import, export
Industry	Dairy, grain, animal feed, meat, fruits and vegetables
Description	One of the largest agricultural holdings in the UAE, founded in 1995, which specializes in the cultivation and processing of agricultural crops, the production and sale of animal feed and food additives, as well as the production of dairy products, poultry, eggs and integrated supply chain management. Serving an extensive customer base spanning the government and commercial sectors, Al Dahra has a broad geographic presence, employing 5,000 people, operating in more than 20 countries and selling products in more than 45 markets, with a leading position in Asia and the Middle East. The group manages a land bank of more than 400 thousand acres with 1,200 subsidiary farms and a park of more than 2 thousand agricultural lands. The company also owns and operates 15 state-of-the-art feed processing facilities. The company is also a leading player in the production, packaging and distribution of grains, operating 3 rice mills and 2 flour mills. Al Dahra owns and operates a grain hub strategically located in the port of Fujairah in the UAE, equipped with 20 elevators and a storage capacity of over 300 thousand tons
Contact Information	**Address:** KIZAD KP A6, Abu Dhabi **Tel.:** +971 2656 5000 **E-mail:** info@aldahra.com **Website:** www.aldahra.com

[11] According to ratings Fortune 500 Arabia: https://clck.ru/3B8yCi

Al Rawabi

Activities	Production, processing, distribution, import, export
Industry	Dairy, drinks, animal feed, meat, confectionery
Description	Al Rawabi, founded in 1989, is now a leading dairy and soft drink company based in Dubai. Currently Al Rawabi produces 350 thousand liters of milk and 150 thousand liters of juices per day. The company also produces beef and semi-finished meat products, cattle feed, flour confectionery and bread, and functional drinks. Al Animal Feed Factory Rawabi was founded in 2001 as part of the company's business diversification strategy. With a storage capacity of more than 25 thousand tons and a daily production of more than 250 tons, the company is also one of the country's largest producers of animal feed based on imported raw materials. The products of the company are sold through a developed distribution network that covers most of the Gulf countries
Contact Information	**Address:** Al Khawaneej, P.O. Box: 50368, Dubai **Tel.:** +971 4 704 3000 **E-mail:** sales@alrawabi.ae **Website:** www.alrawabidairy.com

Emirates Food Industries

Activities	Production, processing, distribution, import, export
Industry	Dairy, drinks, animal feeds
Description	One of the leading holding companies operating in the agro-industrial sector of the UAE, which is owned by National Holding Emirates Food Industries, headquartered in Abu Dhabi, was established to implement the Abu Dhabi Government's roadmap for agriculture and food security programme. The company operates a number of subsidiaries that specialize in the production, marketing and distribution of feed and flour, dairy cattle breeding, and the production of dairy products and juices. The animal feed division produces more than 700 thousand tons of feed per year. National and Masaken Dairy Farms, located in Al Ain, are leaders in livestock rearing and raw milk production in the UAE. These are the largest stand-alone farms in the UAE, supplying fresh milk to some of the region's biggest players. There are about 5,000 cows on the farms, producing about 30 million liters of milk per year
Contact Information	**Address:** Mussafah, ICAD 2, Abu Dhabi **Tel.:** +971 2 499 6999 **E-mail:** info@efi.ae **Website:** https://emiratesfoodindustries.ae

United Foods Company

Activities	Production, distribution, import, export
Industry	Oil and fat, ready-to-eat products
Description	Founded in 1976 by Sultan Al Owais, United Foods Company became a pioneer in the production of fat and oil products by opening the first plant in the GCC countries for processing edible oils and fats. Over the years, the company has grown into a leading oils and fats manufacturing enterprise in both the UAE and the Gulf region. The company also specializes in the import and distribution of a wide range of ice cream under well-known global brands, soft drinks and sauces. For 2023 the company's revenue amounted to 117.3 million US dollars
Contact Information	**Address:** Al Quoz 1 P.O. Box 5836 Dubai **Tel.:** +971 4 506 3800 **E-mail:** info@unitedfoods.ae **Website:** https://emiratesfoodindustries.ae

Al Ain Farms

Activities	Production, distribution, import, export
Industry	Dairy, drinks, meat
Description	Founded in 1981 by Sheikh Zayed Bin Sultan Al Nahyan, Al Ain Farms was the first dairy company founded in the United Arab Emirates. Over more than 40 years the company has become the largest integrated dairy and poultry company, operating five proprietary farms, a hatchery and a poultry plant producing fresh chicken and eggs. The company also specializes in the production of camel milk and owns a herd of 1,800 camels, as well as 15 thousand cows and produces 9 million broiler chickens and 160 million eggs per year. For 2023 the company's revenue amounted to 120 million US dollars
Contact Information	**Address:** 15571 Al Ain, Abu Dhabi **Tel.:** +971 3 711 4600 **E-mail:** customercare@alainfarms.com **Website:** www.alainfarms.com

Albatha

Activities	Production, processing, distribution, import, export
Industry	Meat, confectionery, ready-to-eat products, drinks
Description	Albatha Group of Companies, headquartered in Dubai, was founded in the early 1950s by Sheikh Mohammed Sultan Al Qassimi. Albatha currently consists of more than 25 autonomous companies operating in the following sectors: automotive, healthcare, manufacturing, engineering, electronics, food and real estate. The company is one of the largest and fastest growing group of companies in the UAE. Albatha Division Consumer, responsible for the food sector, operates a number of subsidiaries: Gulf International c specializes in marketing, supply chain management, logistics and distribution; International Beverage and Filling Industries (IBFI) — in the production, packaging and export of soft drinks; Global Food Industries (GFI) — in the production and sale of frozen meat products, snacks, sauces, confectionery, ready-to-eat products
Contact Information	**Address:** Box 1145, Level 23, Albatha Tower Buhaira Corniche, Sharjah **Tel.:** +971 6 572 8882 **E-mail:** business@albatha.com **Website:** www.albatha.com

Al Islami Foods

Activities	Production, processing, distribution, import, export
Industry	Meat, ready-to-eat products
Description	Al Islami Foods founded in 1981. The company is one of the leaders in the local market for the production of Halal meat and frozen food. The company's products are produced under two brands: Al Islami (whole chicken, chicken pieces, burgers, nuggets and meatballs, seafood, vegetables, fries and fruit); Aladdin (wide range of quality frozen foods for children). The company operates a plant with a processing capacity of 17 thousand tons per year and also has partnerships with all UAE retail chains and catering companies, which has allowed it to build a developed distribution network
Contact Information	**Address:** Al Islami Foods Building, Emirates Road. Dubai Investment Park 3922 **Tel.:** +971 4 885 3333 **E-mail:** reception@alislamifoods.com **Website:** https://alislamifoods.com

Al Ghurair

Activities	Production, processing, distribution, import, export
Industry	Grain, animal feed, ready-to-eat products
Description	One of the largest diversified family business groups in the Middle East, operating in various industries: food, real estate, construction, energy, venture capital management. The company's headquarters is located in Deira, activities Al Ghurair spans over 20 countries and 7 sectors worldwide and employs approximately 28 thousand people. Al Division Ghurair Foods is a regional leader in flour milling with over 40 years of experience, annual production capacity of over 1.5 million tonnes and operational elevator capacity of over 230 thousand tonnes at its mills alone. The group also owns and operates various food processing facilities, including an oat mill, a rice mill, a poultry factory and an animal feed mill. For 2023 the Group's revenue amounted to 14 billion US dollars
Contact Information	**Address:** Box 6999 Dubai **Tel.:** +971 4 202 9777 **E-mail:** media@al-ghurair.com **Website:** www.al-ghurair.com

National Food Products Company

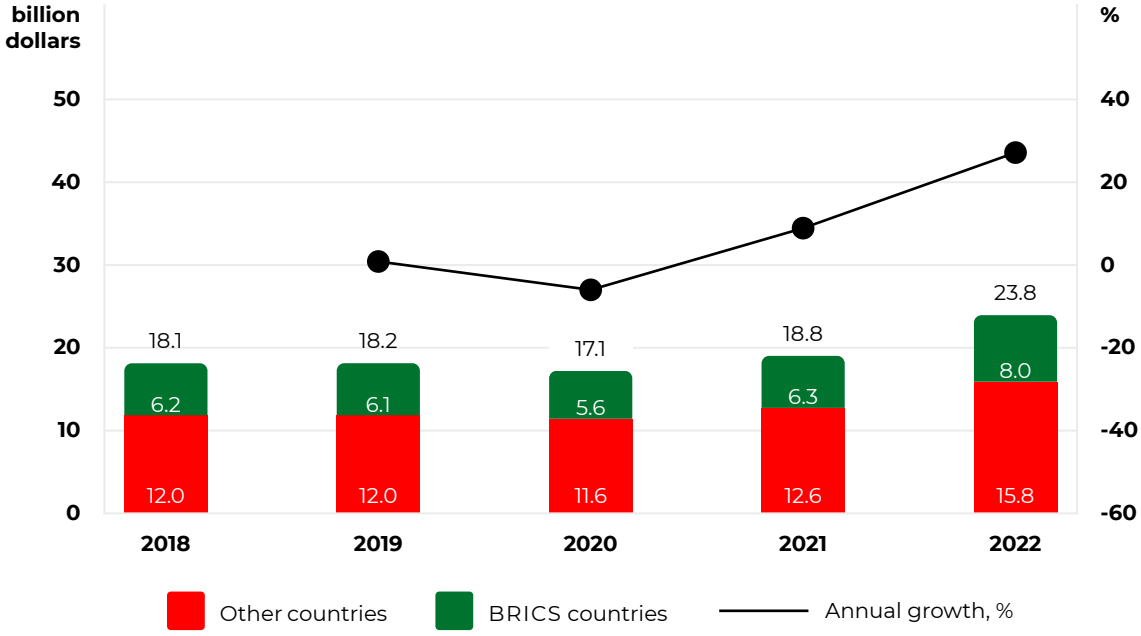
Activities	Production, processing, distribution, import, export
Industry	Dairy, confectionery, drinks
Description	The company was founded in Abu Dhabi in 1971 with the opening of a dairy production plant. Managing a number of renowned brands such as Oasis, Lacnor, Blu, Laban Up, Gulf & Safa, Melco, Milco, Royal Bakers and Aqua Fresh. Currently, it is one of the leaders in the production of dairy products and soft drinks, mainly premium bottled water and juices. NFPC is one of the region's largest employers, employing over 4,500 people across the UAE. The company also export products to more than 40 countries in the Middle East, Africa and Asia, with a special focus on the Gulf countries
Contact Information	**Address:** Next To Dewa Station, Tahlia Street, Exit #25 PO BOX 61130 Dubai **Tel.:** +971 4801 8000 **Website:** www.nfpcgroup.com

2.8.3. Foreign trade in agricultural products

2.8.3.1. Import of agricultural products

In 2022 import of the agricultural products amounted to 23.8 billion US dollars, which is 26.2% (+ 4.9 billion US dollars) higher than the level of 2021. In 2022 import from the BRICS countries increased by 27.0% (+1.7 billion US dollars) compared to the previous year, from other countries by 25.8% (+3.2 billion US dollars). Volume of import of agricultural products for 2018-2022 increased by an average of 7.0% per year.

Import of agricultural products of the UAE, 2018-2022, billion US dollars



Source: ITC Trade Map

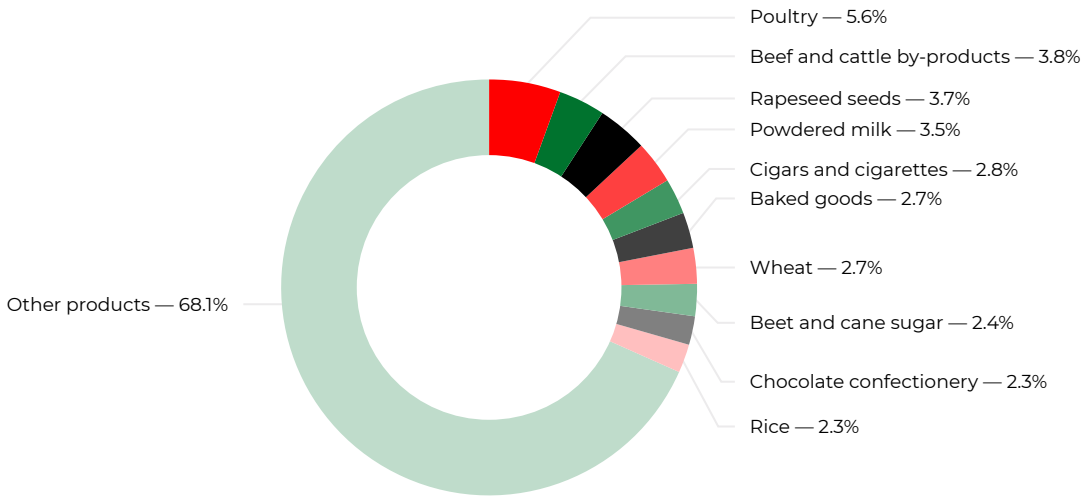
The structure of import of agricultural products in the UAE is highly diversified. At the end of 2022 the structure of the UAE import was dominated by poultry (5.6% of import value), beef and cattle by-products (3.8%), rapeseed (3.7%) and powdered milk (3.5%). In total the top 10 commodity items accounted for 31.9% of the UAE's import of agricultural products in value terms.

Import structure of the UAE agricultural products in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Poultry	793.6	866.1	709.1	843.6	1,332.3	488.7	57.9
2	Beef and cattle by-products	635.7	976.3	617.8	734.7	902.5	167.8	22.8
3	Rapeseed seeds	362.4	317.9	500.2	711.6	890.9	179.3	25.2
4	Powdered milk	679.9	549.6	650.1	636.0	827.2	191.2	30.1
5	Cigars and cigarettes	865.6	658.3	752.5	625.4	655.1	29.8	4.8
6	Baked goods	450.3	496.1	504.4	528.1	651.5	123.4	23.4
7	Wheat	341.9	340.1	378.5	435.8	648.3	212.5	48.7
8	Beet and cane sugar	516.7	305.0	407.2	634.5	581.8	-52.7	-8.3
9	Chocolate confectionery	638.3	672.9	494.0	469.3	549.3	80.0	17.0
10	Rice	700.2	535.4	564.6	396.8	545.8	149.1	37.6
	Other products	12,143.0	12,458.5	11,563.3	12,818.9	16,187.9	3,369.0	26.3
	Total	**18,127.7**	**18,176.2**	**17,141.5**	**18,834.9**	**23,772.8**	**4,938.0**	**26.2**

Source: ITC Trade Map

Import structure of the UAE agricultural products in value terms, 2022, %



Source: ITC Trade Map

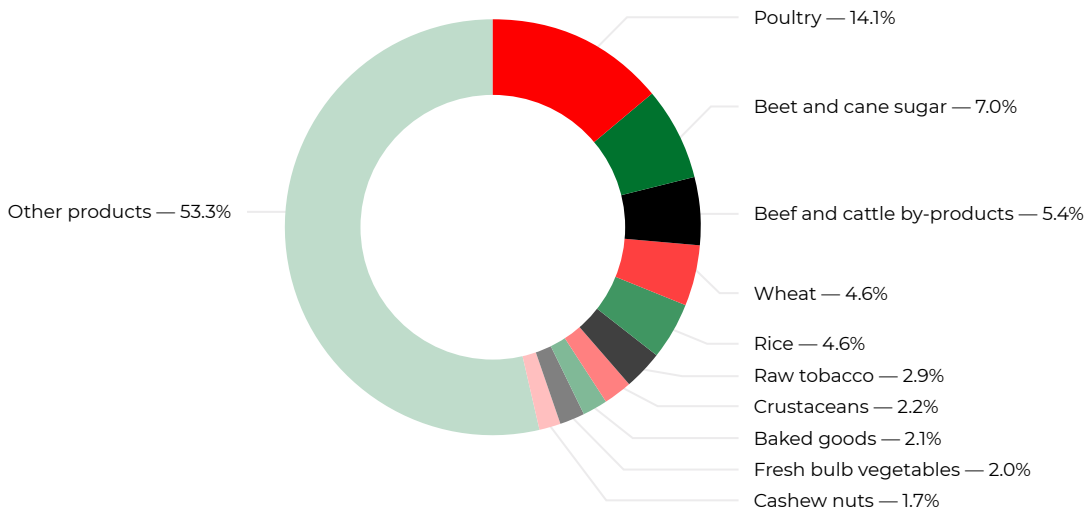
In 2022 the structure of the UAE import from the BRICS countries was dominated by poultry (14.1% of import value). The top 5 imported agricultural products also included beet and cane sugar (7.0%), beef and cattle by-products (5.4%), wheat (4.6%) and rice (4.6%). In total the top 10 commodity items accounted for 46.7% of the UAE's import of agricultural products from the BRICS countries in value terms.

Import structure of the UAE agricultural products from the BRICS countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Poultry	646.4	684.4	517.7	673.7	1,125.0	451.3	67.0
2	Beet and cane sugar	455.5	270.3	371.8	603.8	558.0	-45.8	-7.6
3	Beef and cattle by-products	333.3	650.5	295.1	339.0	429.9	90.9	26.8
4	Wheat	157.5	176.6	188.5	219.5	368.2	148.6	67.7
5	Rice	548.9	375.0	409.3	285.1	366.0	80.9	28.4
6	Raw tobacco	241.5	118.0	165.6	174.3	230.1	55.8	32.0
7	Crustaceans	212.5	207.8	185.3	191.1	178.9	-12.2	-6.4
8	Baked goods	138.3	152.9	139.3	137.6	168.9	31.4	22.8
9	Fresh bulb vegetables	99.2	121.0	111.9	110.3	158.0	47.7	43.2
10	Cashew nuts	139.2	120.9	91.1	130.0	134.0	4.0	3.1
	Other products	3,184.2	3,264.9	3,115.6	3,404.9	4,245.1	840.2	24.7
	Total	**6,156.5**	**6,142.4**	**5,591.1**	**6,269.2**	**7,961.9**	**1,692.7**	**27.0**

Source: ITC Trade Map

Import structure of the UAE agricultural products from the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

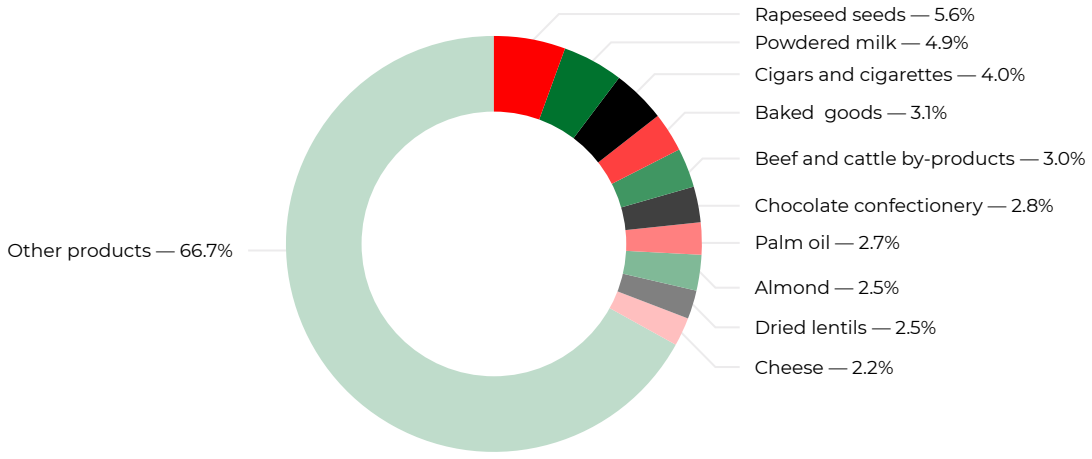
The structure of import of the UAE agricultural products from other countries is≈quite diversified. In 2022 the structure of import was dominated by rapeseed seeds (5.6% of import value), milk powder (4.9%), cigars and cigarettes (4.0%), baked goods (3.1%) and beef and edible cattle by-products (3.0%). In total the top 10 commodity items accounted for 33.3% of the UAE's import of agricultural products from other countries in value terms.

Import structure of the UAE agricultural products from other countries in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Rapeseed seeds	362.4	317.9	500.1	711.6	884.8	173.2	24.3
2	Powdered milk	656.7	525.0	617.1	596.8	774.2	177.5	29.7
3	Cigars and cigarettes	789.8	561.3	720.9	601.9	638.4	36.5	6.1
4	Baked goods	312.0	343.2	365.1	390.5	482.6	92.0	23.6
5	Beef and cattle by-products	302.4	325.7	322.7	395.8	472.6	76.9	19.4
6	Chocolate confectionery	439.6	432.6	333.3	346.7	449.9	103.2	29.8
7	Palm oil	256.1	197.4	173.0	319.9	421.8	101.9	31.9
8	Almond	239.5	340.5	272.7	336.6	399.8	63.2	18.8
9	Dried lentils	99.0	97.9	128.0	171.6	392.2	220.6	128.5
10	Cheeses	253.3	247.5	225.3	258.7	348.7	90.0	34.8
	Other products	8,260.3	8,644.7	7,892.1	8,435.7	10,546.0	2,110.3	25.0
	Total	**11,971.2**	**12,033.9**	**11,550.4**	**12,565.7**	**15,810.9**	**3,245.2**	**25.8**

Source: ITC Trade Map

Import structure of the UAE agricultural products from other countries in value terms, 2022, %



Source: ITC Trade Map

The BRICS countries provide about a third of the UAE's total import of agricultural products in value terms (33.5% in 2022). Among the countries of the association the largest exporters of agricultural products were India (10.6% of import in value terms), Brazil (8.8%), Saudi Arabia (4.3%) and China (3.4%) — these countries accounted for 81.0% import of the UAE agricultural products from the BRICS countries.

Also among the main exporters of agricultural products in 2022 were Australia (7.0% of import in value terms) and the USA (6.2%).

The main countries exporting agricultural products to the UAE in value terms, 2018-2022, million US dollars

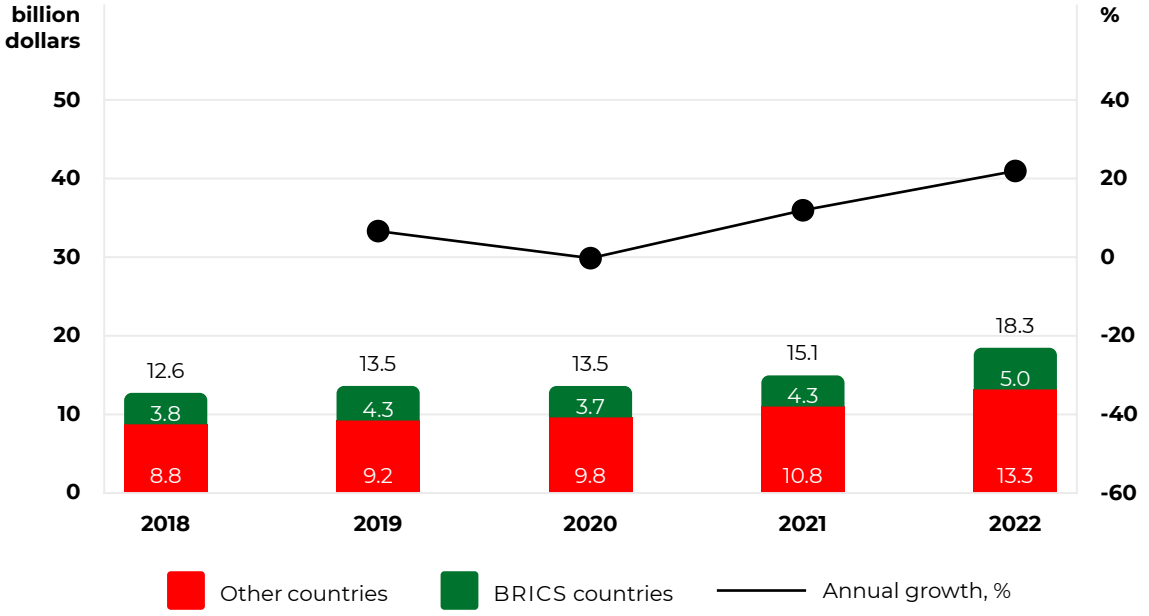
№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	India	1,995.8	1,713.9	1,684.3	2,097.9	2,519.9	421.9	20.1
2	Brazil	1,455.1	1,621.8	1,251.7	1,441.5	2,098.5	657.1	45.6
3	Saudi Arabia	826.5	852.8	786.7	837.8	1,022.6	184.8	22.1
4	China	533.1	550.2	490.7	551.1	806.0	254.9	46.2
5	South Africa	311.0	321.3	371.3	420.7	476.6	55.9	13.3
6	Egypt	314.4	341.5	362.4	343.2	421.9	78.7	22.9
7	Iran	265.1	242.5	236.6	260.2	302.9	42.7	16.4
8	Russia	365.0	432.7	345.4	229.1	234.7	5.6	2.4
9	Ethiopia	90.5	65.6	62.1	87.5	78.8	-8.7	-10.0
	Total BRICS	**6,156.5**	**6,142.4**	**5,591.1**	**6,269.2**	**7,961.9**	**1,692.7**	**27.0**
1	Australia	787.7	598.1	538.1	879.9	1,659.3	779.4	88.6
2	USA	1,278.3	1,590.6	1,275.9	1,284.5	1,478.8	194.3	15.1
3	France	561.3	533.1	398.1	544.0	776.9	233.0	42.8
4	United Kingdom	541.2	508.0	452.7	494.5	661.8	167.4	33.8
5	Canada	511.0	535.7	799.2	817.5	631.9	-185.5	-22.7
6	Türkiye	335.0	398.1	429.8	469.0	602.7	133.7	28.5
7	New Zealand	602.6	503.3	509.2	509.3	591.3	82.0	16.1
8	Netherlands	538.5	520.0	503.5	531.1	582.3	51.2	9.6
9	Italy	347.9	382.4	348.5	402.9	530.4	127.5	31.7
10	Pakistan	396.8	418.9	435.8	403.6	508.6	105.0	26.0
	Other countries	6,070.7	6,045.7	5,859.6	6,229.6	7,786.9	1,557.3	25.0
	Total non-BRICS	**11,971.2**	**12,033.9**	**11,550.4**	**12,565.7**	**15,810.9**	**3,245.2**	**25.8**
	Total	**18,127.7**	**18,176.2**	**17,141.5**	**18,834.9**	**23,772.8**	**4,938.0**	**26.2**

Source: ITC Trade Map

2.8.3.2. Export of agricultural products

Export of the UAE agricultural products in 2022 amounted to 18.3 billion US dollars, which is 21.1% (+3.2 billion US dollars) higher than in 2021. In 2022 export to the BRICS countries increased by 16.1% (+0.7 billion US dollars), while to other countries by 23.1% (+2.5 billion US dollars). For 2018-2022 the UAE agricultural export increased at an average annual rate of 9.9%.

Export agricultural products of the UAE, 2018-2022, billion US dollars



Source: ITC Trade Map

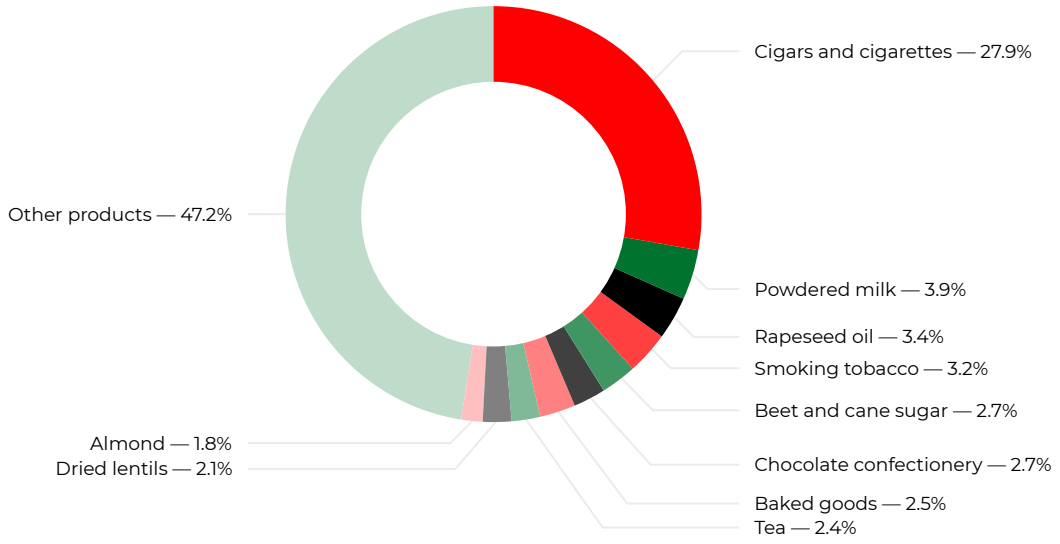
The main export product of the UAE agro-industrial complex in 2022 was cigars and cigarettes (27.9%). Also in the top 5 key export products of the agricultural sector were milk powder (3.9%), rapeseed oil (3.4%), smoking tobacco (3.2%), as well as beet and cane sugar (2.7%). In total the top 10 exported types of products accounted for 52.8% of the UAE's agricultural export value.

Export structure of the UAE agricultural products in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Cigars and cigarettes	4,219.8	4,284.0	3,990.6	4,423.9	5,117.1	693.3	15.7
2	Powdered milk	652.2	629.3	588.6	628.6	721.5	92.9	14.8
3	Rapeseed oil	47.1	214.9	380.0	479.8	628.8	149.0	31.1
4	Smoking tobacco	281.6	307.8	287.9	379.3	588.0	208.7	55.0
5	Beet and cane sugar	371.3	160.6	596.6	702.6	497.4	-205.2	-29.2
6	Chocolate confectionery	433.3	434.6	437.4	415.1	495.0	79.9	19.3
7	Baked goods	262.3	292.8	315.0	346.0	462.9	116.8	33.8
8	Tea	295.0	295.4	315.7	338.0	439.4	101.4	30.0
9	Dried lentils	107.0	123.7	184.1	239.6	389.8	150.2	62.7
10	Almond	208.4	274.8	235.0	267.1	329.6	62.4	23.4
	Other products	5,681.0	6,491.0	6,201.3	6,905.0	8,649.2	1,744.1	25.3
	Total	**12,558.9**	**13,509.0**	**13,532.1**	**15,125.0**	**18,318.5**	**3,193.6**	**21.1**

Source: ITC Trade Map

Export structure of the UAE agricultural products in value terms, 2022, %



Source: ITC Trade Map

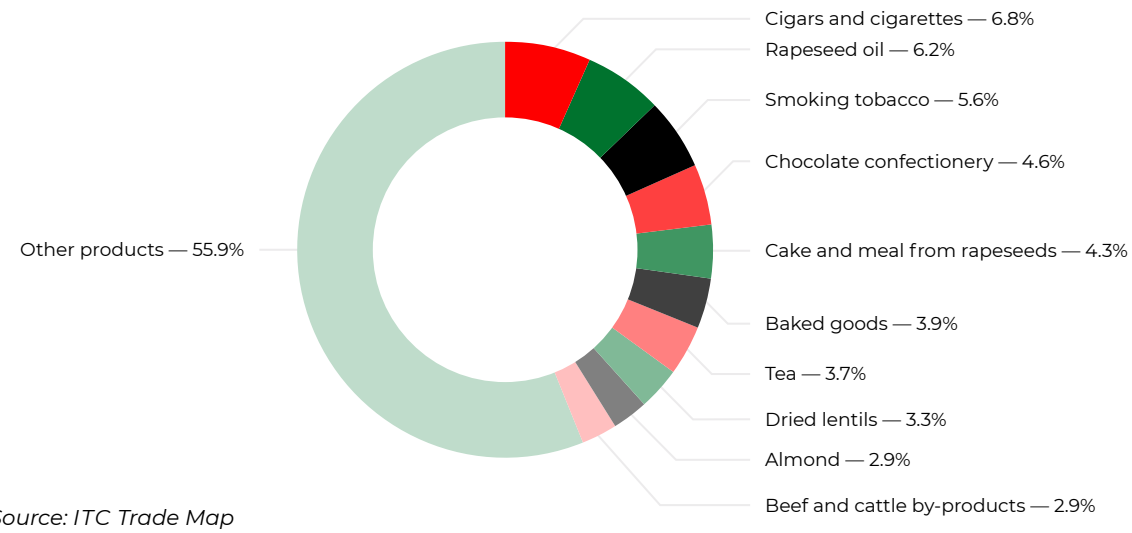
The main export products of the UAE agro-industrial complex to the BRICS countries in 2022 were cigars and cigarettes (6.8%), rapeseed oil (6.2%), smoking tobacco (5.6%), chocolate confectionery (4.6%), cake and meal from rapeseeds (4.3%). In total the top 10 exported types of products accounted for 44.1% of the value of export of agricultural products in the UAE.

Export structure of the UAE agricultural products to the BRICS countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Cigars and cigarettes	535.7	471.8	192.2	406.6	338.3	-68.2	-16.8
2	Rapeseed oil	11.2	172.5	342.7	386.8	308.0	-78.8	-20.4
3	Smoking tobacco	103.8	119.2	90.2	125.1	282.1	157.0	125.5
4	Chocolate confectionery	225.6	201.7	163.1	165.7	227.4	61.7	37.3
5	Cake and meal from rapeseeds	—	37.2	102.5	166.9	215.1	48.2	28.9
6	Baked goods	113.9	126.4	129.0	148.5	196.4	47.9	32.3
7	Tea	108.7	105.1	126.2	148.2	184.6	36.4	24.6
8	Dried lentils	74.7	44.8	80.1	95.9	164.2	68.3	71.2
9	Almond	117.1	163.6	102.4	139.6	144.6	5.0	3.6
10	Beef and cattle by-products	97.1	448.9	85.5	110.3	142.5	32.2	29.2
	Other products	2,385.3	2,413.0	2,319.9	2,407.4	2,790.6	383.2	15.9
	Total	**3,772.9**	**4,304.0**	**3,733.9**	**4,301.1**	**4,994.0**	**693.0**	**16.1**

Source: ITC Trade Map

Export structure of the UAE agricultural products to the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

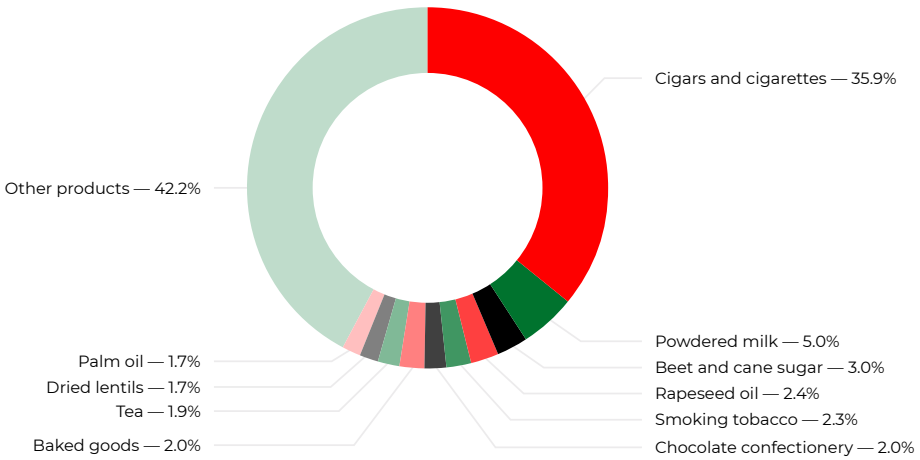
The main export products of the UAE agro-industrial complex in 2022 to other countries were cigars and cigarettes (35.9%). Also in the top 5 key export products of the agricultural sector were milk powder (5.0%), beet and cane sugar (3.0%), rapeseed oil (2.4%) and smoking tobacco (2.3%). In total the top 10 exported types of products accounted for 57.8% of the value of export of agricultural products in the UAE.

Export structure of the UAE agricultural products to other countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Cigars and cigarettes	3,684.1	3,812.2	3,798.4	4,017.3	4,778.8	761.5	19.0
2	Powdered milk	443.4	443.9	435.4	509.9	661.4	151.5	29.7
3	Beet and cane sugar	289.2	117.5	502.8	591.5	402.9	-188.7	-31.9
4	Rapeseed oil	36.0	42.4	37.3	93.0	320.8	227.8	245.0
5	Smoking tobacco	177.8	188.7	197.7	254.2	305.8	51.7	20.3
6	Chocolate confectionery	207.8	232.9	274.3	249.4	267.5	18.2	7.3
7	Baked goods	148.3	166.4	185.9	197.6	266.5	68.9	34.9
8	Tea	186.3	190.4	189.4	189.8	254.8	65.0	34.2
9	Dried lentils	32.4	78.9	104.0	143.7	225.5	81.9	57.0
10	Palm oil	73.3	41.2	60.8	157.3	221.0	63.7	40.5
	Other products	3,507.6	3,890.5	4,012.2	4,420.3	5,619.5	1,199.2	27.1
	Total	**8,786.0**	**9,205.0**	**9,798.2**	**10,823.9**	**13,324.5**	**2,500.6**	**23.1**

Source: ITC Trade Map

Export structure of the UAE agricultural products to other countries in value terms, 2022, %



Source: ITC Trade Map

The BRICS countries account for about 30% of the UAE's total agricultural export in value terms (27.3% in 2022). Among the countries of the association the largest importers of agricultural products were Saudi Arabia (11.0% of export in value terms) and Iran (7.7%).

The main importers of agricultural products from the UAE in 2022 also included Iraq (9.4% of export in value terms), Oman (8.2%), Somalia (5.1%) and Kuwait (4.4%).

The main importing countries of agricultural products from the UAE in value terms, 2018-2022, million US dollars

№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Saudi Arabia	1,594.2	1,613.2	1,784.6	1,715.2	2,021.8	306.6	17.9
2	Iran	1,509.4	1,650.8	732.3	823.5	1,418.8	595.3	72.3
3	China	88.6	306.9	574.7	879.5	650.7	-228.8	-26.0
4	India	171.6	227.4	230.2	379.5	391.0	11.5	3.0
5	Egypt	211.0	243.1	217.5	259.2	260.4	1.2	0.4
6	Russia	126.8	186.4	117.2	136.5	124.4	-12.1	-8.9
7	South Africa	36.2	37.2	38.7	47.2	56.7	9.4	20.0
8	Ethiopia	30.6	32.8	25.2	37.3	42.7	5.4	14.4
9	Brazil	4.5	6.2	13.5	23.1	27.6	4.5	19.6
	Total BRICS	**3,772.9**	**4,304.0**	**3,733.9**	**4,301.1**	**4,994.0**	**693.0**	**16.1**
1	Iraq	1,889.6	1,675.0	1,276.6	1,270.0	1,727.8	457.7	36.0
2	Oman	1,168.5	1,283.2	1,041.8	1,172.2	1,502.6	330.4	28.2
3	Somalia	447.8	616.1	755.4	730.0	929.3	199.4	27.3
4	Kuwait	569.2	606.2	718.4	740.3	805.9	65.6	8.9
5	Yemen	283.3	423.6	444.9	499.4	593.9	94.5	18.9
6	Libya	290.4	364.2	559.6	572.0	503.7	-68.3	-11.9
7	Afghanistan	459.4	428.7	575.1	380.5	450.1	69.6	18.3
8	Syria	318.5	415.9	501.9	364.9	381.6	16.8	4.6
9	Italy	24.8	27.9	18.5	88.0	367.6	279.6	317.6
10	Pakistan	161.9	144.1	453.7	406.5	318.1	-88.3	-21.7
	Other countries	3,172.5	3,220.1	3,452.5	4,600.1	5,743.7	1,143.6	24.9
	Total non-BRICS	**8,786.0**	**9,205.0**	**9,798.2**	**10,823.9**	**13,324.5**	**2,500.6**	**23.1**
	Total	**12,558.9**	**13,509.0**	**13,532.1**	**15,125.0**	**18,318.5**	**3,193.6**	**21.1**

Source: ITC Trade Map

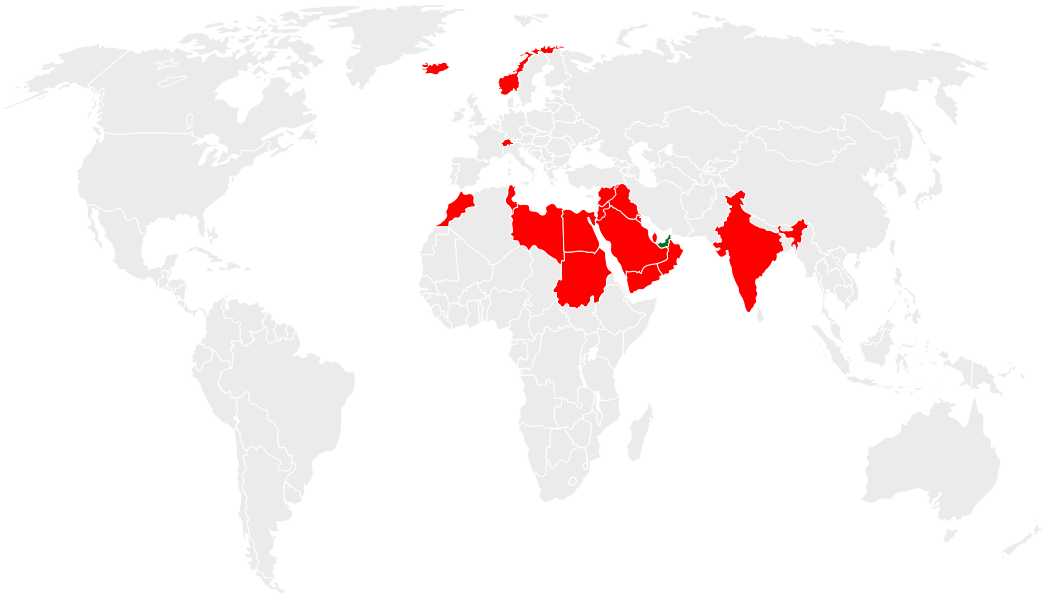
2.8.3.3. International cooperation

The UAE is a member of the Gulf Cooperation Council (GCC). The GCC was created in 1981 as a strategic alliance of the UAE, Bahrain, Saudi Arabia, Oman, Qatar and Kuwait.

The UAE is also a party to the Arab Free Trade Agreement. Since January, 2005 tariffs on most goods from the mutual trade of member states of the agreement (referred to as GAFTA) have been zeroed out. GAFTA participants today are the countries of North Africa and the Arabian Peninsula (Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, the UAE, Yemen).

The UAE has free trade agreements with Morocco and India, and as a member state of the GCC, a free trade agreement with the European Free Trade Association (EFTA, European Free Trade Association) and Singapore.

UAE trade agreements



State/association with which the UAE has entered into a preferential trade agreement	Effective date of the agreement
GCC: Bahrain, North Arabia, Oman, Qatar, Kuwait	1981
GAFTA: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, North Arabia, Sudan, Syria, Tunisia, the UAE, Yemen	1998
Morocco	2003
Singapore (within GCC)	2013
EFTA: Iceland, Liechtenstein, Norway, Switzerland (within GCC)	2014
India	2022

2.8.3.4. Special economic zones

There are more than 40 free economic zones (FEZ) in the UAE most of which are located in the financial and economic center of the country — the emirate of Dubai. It was here, in the largest port of Jebel Ali in the Middle East, that the first free economic zone in the UAE, JAFZA, was opened in 1985. The emirate's government has made active efforts to attract international companies to create a regional trade center and logistics hub at the port. JAFZA has become one of the largest free trade zones in the world. After this success, the creation of similar zones began throughout the country, and today they exist in every emirate.

There are at least 18 types of SEZs in the UAE depending on the main specialization of the companies registered in them, including financial, trade and logistics and port areas, as well as commodity trading zones. Accounting, classification and general coordination of the activities of SEZs in the emirates is carried out by Ministry of Economy. At the same time there is no uniform legislation on the functioning of zones of all types; each SEZ has its own administration and its own regulations for regulating economic activity, requirements for authorized capital, the number of directors, auditing, reporting and other features of the companies.

In the UAE SEZ foreign companies are provided with the following preferences:

- 100% foreign ownership of the enterprise (no need to attract local partners);
- unlimited repatriation of capital and profits;
- accelerated and simplified business registration procedure;
- full exemption from corporate and income taxes;
- complete exemption from customs duties on export and import;
- separate legislation and own rules in the territory of the FEZ;
- modern infrastructure and additional favorable conditions for specific sectors of specialization.

Of the currently operating SEZs a significant part specializes in the development of modern information technologies, media and science. It is advisable for Russian exporters of agricultural products to pay attention to Dubai Multi Commodities Center (DMCC), Jebel Ali Free Zone (JAFZA), Hamriyah Free Zone (HFZA), Khalifa Port Free Trade Zone (KPFTZ).

2.8.3.5. Institutes for supporting the export of agricultural products

Abu Dhabi Exports Office

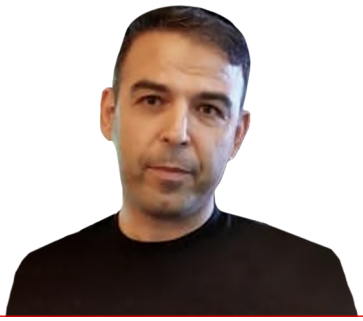
Description	The Abu Dhabi Exports Office is a division of the Abu Dhabi Development Fund established to finance and provide guarantees for the export of non-commodity products. The bureau's goal is to increase national export and the number of export markets as well as provide guarantees to local exporting companies. One of the activities of the Abu Dhabi Export Office is to support the export of agricultural products. In 2023 the Abu Dhabi Export Office and the Agricultural Holding Dahra entered into an agreement to ensure the supply of grain products to Egypt[12]
Main goals	• providing export loans to importers of the UAE products; • providing guarantees by financial institutions providing loans to foreign importers; • opening credit lines for foreign financial institutions to provide loans to foreign importers; • providing advice in the field of export financing
Contact details	**Address:** King Abdullah bin Abdulaziz Al Saud Street P.O.Box 814, Al-Bateen Area Abu Dhabi **Tel.:** +971 269 39 400 **E-mail:** info@adex.ae **Website:** https://www.adex.ae/

Dubai Industries & Exports

Description	Dubai Industries & Exports is a government agency within the Government of Dubai, whose purpose is to develop the export of products manufactured in the emirate as well as provide support to foreign buyers. The agency is implementing initiatives to train export activities, create a favorable and inclusive environment for export, search for foreign partners and insure risks. Dubai Industries & Exports operates a network of foreign representative offices in more than 20 foreign countries including Russia, Brazil, China, India, Saudi Arabia, Egypt and others. The agency's partners are leading foreign export support institutions such as the Egyptian Export Development Authority, the Sao Paulo Investment Agency, the Korea Trade and Investment Promotion Agency, the Hong Kong Trade Development Council, etc.
Main goals	• providing consultations on export issues, information support for exporting companies; • promoting participation in international exhibition events; • assistance in finding foreign partners; • facilitating the search for a local supplier and demonstrating the export potential of the emirate
Contact details	**Address:** One Central, building 2, PO Box 594 Dubai **Tel.:** +971 4445 5355 **E-mail:** rsvp@dedc.gov.ae **Website:** https://dubaiie.gov.ae/page/en/dubai_exports_company

[12] https://clck.ru/3AjiFM

Expert opinion



Hassan Khalili

Chairman of the board, Misagh Tejarat Gharn

"The strengths of the Iranian agro-industrial complex are the availability of natural resources, a developed agricultural raw material base and its own production of high-value-added goods. It is also worth noting the high level of state support for agriculture. But at the same time, there remains problem of technological support of the agricultural sector, as well as a lack of investment.

In this regard, in my opinion, within the framework of BRICS the participating countries could be useful to each other. First of all, it is necessary to implement joint infrastructure projects, establish the most convenient routes for the delivery of agricultural products between the BRICS countries, which would significantly increase trade turnover between our countries. In addition, an important aspect is to ensure a stable payment system, including through the creation of a single currency within the framework of BRICS, for example. In addition to the initiatives already listed, it is possible to consider the possibility of cooperation between the BRICS member countries in terms of advanced training and personnel training in the field of agriculture, biotechnology and agricultural sciences.

The BRICS member countries with a population of more than 3.5 billion people, accounting for more than 45% of the world's population, and an area equal to a third of the globe, have high potential for bilateral and multilateral cooperation due to their geopolitical and geostrategic position, rich resources, and highly qualified workforce.

Participation in BRICS gives our country many advantages, in particular: access to the large consumer market of the participating countries, the opportunity to attract foreign investment and develop financial cooperation with the countries through the BRICS Bank. It is obvious that Iran's participation in BRICS adds prestige to the country in the international arena, increases its regional and international status and promotes the establishment of Iran's business ties with new countries. We believe that the increased cooperation with the BRICS member states will facilitate the attraction of new economic partners to our country at the regional and international levels."

2.9. Iran

2.9.1. Social and economic profile

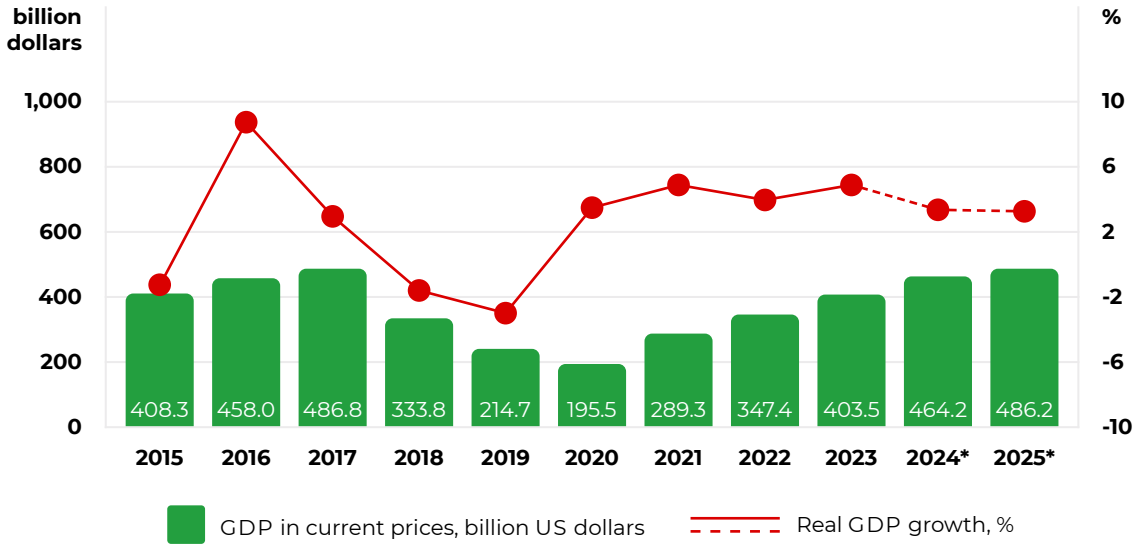
The Islamic Republic of Iran (Iran) is a state located in the Middle East at the intersection of strategically vital trade routes between Europe and Asia and possesses one of the largest consumer markets in the region. The country's population amounts to 87.0 million people. However, the population growth rate is gradually decreasing. The urbanization rate in 2022 was 76.8%. The country's area is 1.7 million km^2 with 470.7 thousand km^2 suitable for agriculture. FDI inflow in 2022 amounted to 1.5 billion US dollars.

Agriculture accounts for 12.8% of Iran's GDP while the industrial and service sectors account for 39.9% and 45.0%, respectively. 15.1% of the Iran's population is employed in the agricultural sector, 34.2% — in the industrial and 50.7% — in the service sector. Iran's agricultural products account for 29.6% of import and 6.1% of export.

Despite the ongoing diversification, Iran's economy is still based on the oil and gas sector. The country's hydrocarbon reserves are still among the largest in the world and serve as the main source of budget revenues, as well as the main export commodity. For this reason, the dynamics of economic development is characterized by a high degree of volatility due to dependence on the global oil and gas market conditions. Nevertheless, among the strengths of the Iranian economy is a vigorously growing and diversified industrial sector, unlike many oil states. In 2022 it accounted for 40.2% of the country's GDP, according to the World Bank. The sustainability of the country's industrial sector could be seen in 2020. The decline in production was less pronounced in contrast to other countries, which, along with the low base effect after two years of recession, allowed Iran to show an economic growth rate of 3.3%. The service sector is also a promising area of development due to the growing middle class and consumer demand, as well as the development of the telecommunications sector. The tourism sector also has significant unrealized potential, which is constrained by foreign policy factors.

Iran's real GDP growth was 4.7% in 2023, demonstrating the resilience of the economy in the face of sanctions.

Dynamics of Iranian GDP in current prices, 2015-2025



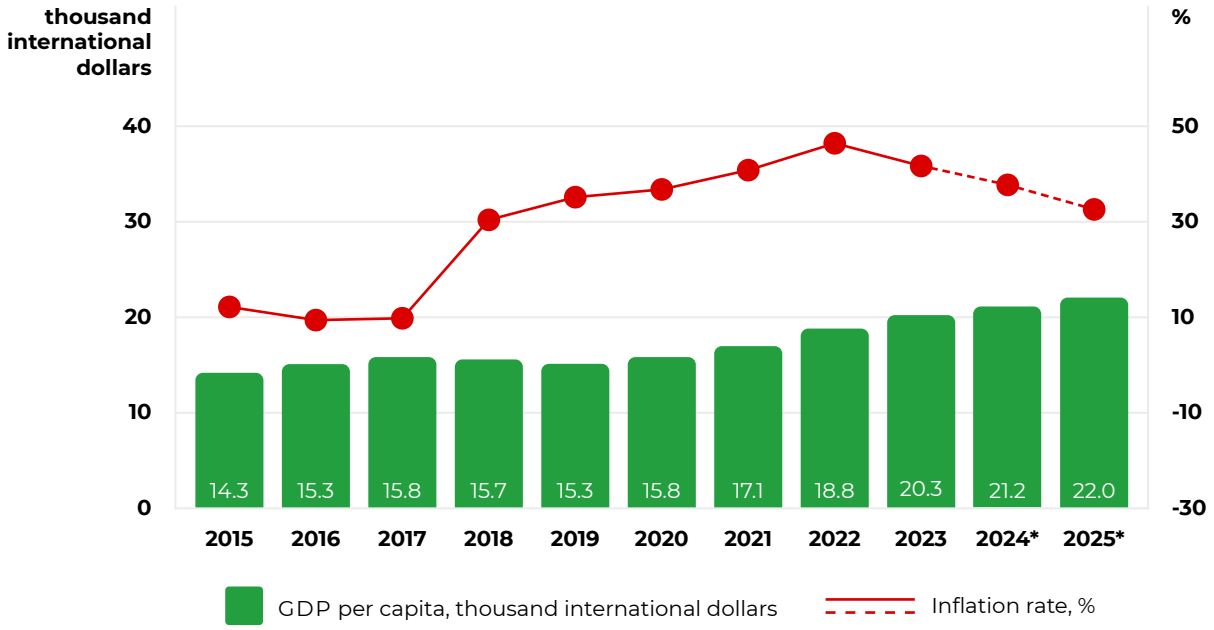
Source: IMF

*Notes: *forecast, IMF data as of April 16, 2024.*

In 2023 Iran's GDP by PPP per capita amounted to 20.3 thousand international dollars. According to IMF, this figure could increase to 22.0 thousand US dollars by 2025.

Inflationary pressures in Iran intensified in 2018 following the imposition of the US sanctions. According to the IMF, consumer price growth amounted to 45.8%. Over 2018-2022 the increase was also driven by the depreciation of the national currency, rising food prices, the removal of government subsidies and the real estate crisis. By 2023 inflation started to decline after a sharp spike in 2022, but will continue to be at extremely high levels in the medium term.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

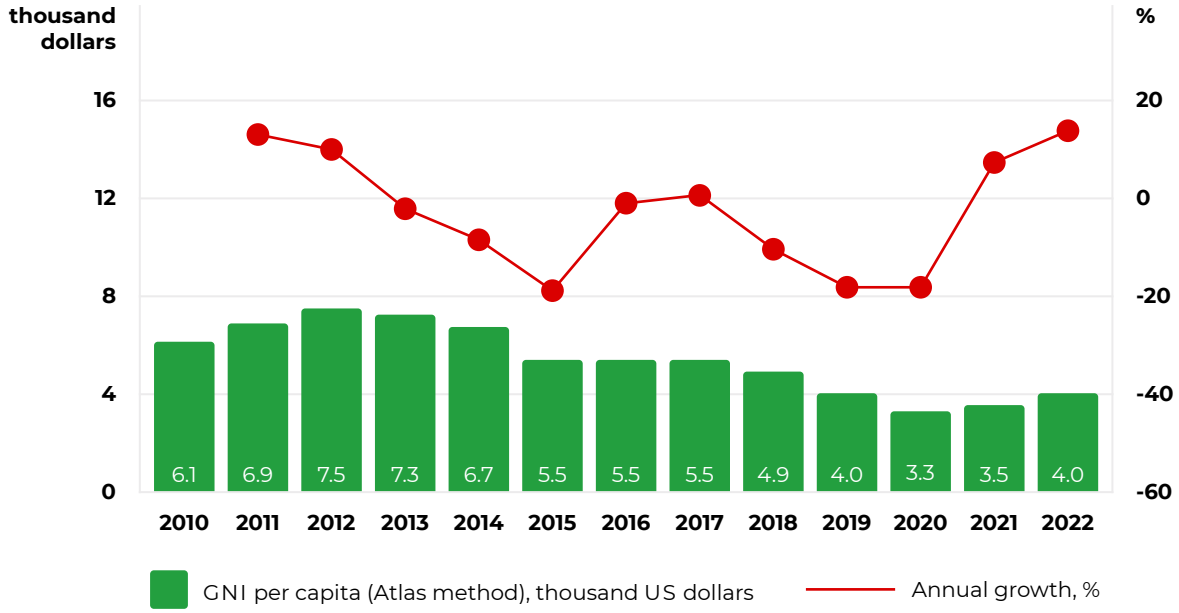


Source: IMF

*Notes: *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, Iran belongs to the group of lower-middle income countries. In 2022 Iran's GNI per capita was 4.0 thousand US dollars, increasing by 13.4% compared to 2021.

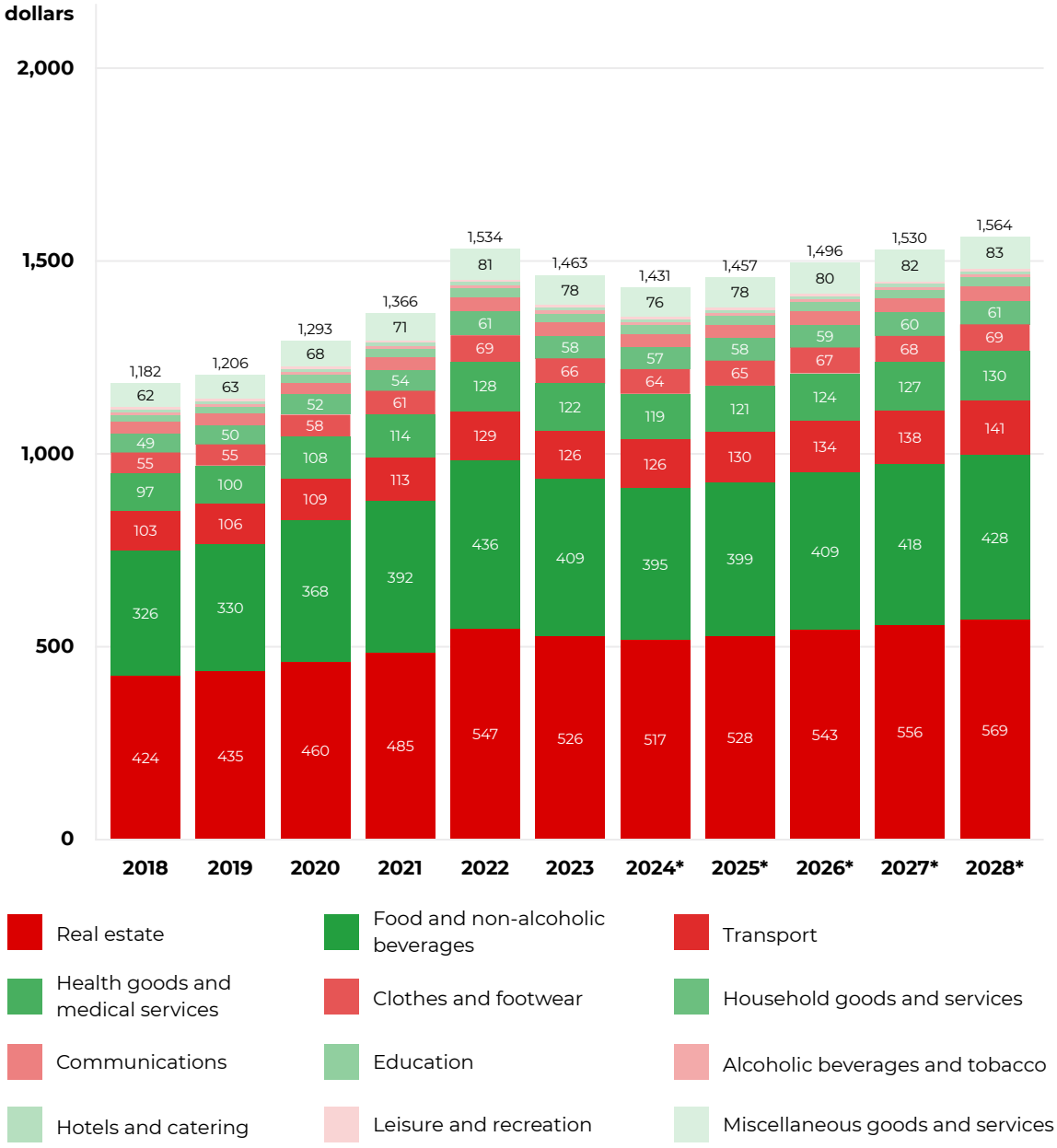
Dynamics of GNI per capita in Iran, 2010-2022



Source: World Bank

In 2023 final consumption expenditures per capita amounted to 1,463 US dollars in constant prices which was 4.6% more compared to 2022. The main part of these expenditures accounted for real estate sector - 35.9%. Expenditures spent on food and non-alcoholic beverages accounted for 28.0% and ranked second in the structure of final consumption expenditures. It is expected that final consumption expenditures per capita reach 1,564 US dollars in 2028, of which 428 US dollars will be spent on food and non-alcoholic beverages.

Final consumption expenditures in Iran per capita in constant prices 2023, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Notes: *forecast.*

2.9.2. Agriculture

2.9.2.1. Crop and livestock production

Agriculture is an important component of Iran's economy. However, despite the significant potential, the country's agricultural industry is inhibited by the arid climatic environment prevailing in the country. Thus, there is a problem of chronic water shortage in Iran caused by low rainfall levels and irrational use of the available resources. According to the World Bank data, irrigation systems account approximately for 92% of the country's water resources. Nevertheless, their productivity remains extremely low affecting both yields and country's food market prices. At the same time the availability of water in Iran is decreasing due to the population growth and the global warming, that compounding the country's drought problem. In addition, Iranian farmers have limited access to modern agricultural technology, while sanctions do not allow for the import of sufficient quantities of necessary equipment.

Iran's crop production is dominated by the cultivation of fruits and berries, among which oranges are the most common. In 2022 their production reached 2.3 million tons. Apples (2.0 million tons in 2022) and grapes (1.4 million tons) are also grown in the country. Among cereal crops wheat accounted for the majority of production. In 2022 wheat production amounted to 10 million tons. Gross harvests of barley and rice amounted to 3 and 1.5 million tons, respectively. Sugar cane production amounted to 8 million tons, sugar beet production — 5 million tons. Among vegetables, roots and tubers tomatoes accounted for 3.4 million tons, potatoes for 2.6 million tons and onions and shallots for 1.9 million tons.

Production of crop products, thousand tons

	2018	2019	2020	2021	2022
Fruits and berries	**15,889.9**	**16,711.7**	**16,286.5**	**16,500.8**	**15,480.9**
Oranges	2,184.7	2,308.7	2,198.3	2,251.1	2,321.1
Apples	1,936.7	2,241.1	2,241.1	2,767.8	1,989.7
Grapes	1,915.1	1,945.9	1,839.9	1,614.6	1,417.9
Cereals	**18,650.8**	**21,986.0**	**15,627.8**	**14,836.1**	**14,812.7**
Wheat	13,012.4	14,500.0	10,416.2	10,093.6	10,000.0
Barley	2,909.8	3,600.0	2,940.7	2,814.3	3,000.0
Rice	2,106.6	2,473.5	1,820.4	1,595.3	1,500.0
Sugar cane	**9,100.2**	**7,550.0**	**7,840.0**	**8,258.2**	**8,000.0**
Sugar beet	**6,290.6**	**5,516.2**	**5,435.2**	**5,146.9**	**5,000.0**

	2018	2019	2020	2021	2022
Vegetables, roots and tubers	**14,852.3**	**14,956.9**	**14,425.4**	**13,543.1**	**13,264.2**
Tomatoes	4,930.2	4,348.8	3,615.9	3,392.2	3,400.0
Potatoes	3,574.9	3,452.3	3,215.0	2,599.1	2,600.0
Onion and shallots	1,517.7	1,982.6	2,365.5	1,925.4	1,900.0

Source: FAOSTAT

Dairy farming is well developed in Iran and the country is among the regional leaders in raw milk production. Production of cow's milk in 2022 amounted to 7.5 million tons, sheep's milk — 399.5 thousand tons, goat's milk — 318.4 thousand tons. The main type of meat produced in Iran is poultry meat — 2.1 million tons in 2022. The country also produces beef and lamb — 293.4 and 254.8 thousand tons, respectively. Iran's fisheries industry is one of the largest in the region due to its access to large water bodies: Persian and Gulf of Oman and the Caspian Sea. The production of fish and seafood in 2022 amounted to almost 1.3 million tons.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	12.06	12.06	12.59	13.05	13.38
Cow's milk, thousand tons	6,800.0	6,800.0	7,509.0	7,957.0	7,497.0
Ewe's milk, thousand tons	321.3	328.4	376.2	391.2	399.5
Goat's milk, thousand tons	282.5	277.8	350.8	317.7	318.4
Poultry, thousand tons	2,355.0	2,383.7	2,430.5	2,106.3	2,089.6
Beef, thousand tons	217.3	173.1	249.8	336.3	293.4
Lamb, thousand tons	157.3	116.5	151.9	238.1	254.8
Fish and seafood, thousand tons	1,268.1	1,282.7	1,271.4	1,258.2	1,274.4*

Source: FAOSTAT
*Notes: *estimated.*

2.9.2.2. Overview of milestones in the agro-industrial complex

1949 Development plan

The first National Development Plan. State investment in the development of agricultural industry and irrigation amounted to 13.3 million US dollars (19.6% of the total state investment amount).

1953 Foreign policy

Iran became the member of the Food and Agriculture Organization of the UN (FAO).

1954 Companies

Establishment of two of Iran's largest companies: Iran Dairy Industries Co. — one of the largest companies in the dairy sector in the Middle East and Zamzam Group — a company specializing in soft drinks.

1956 Development plan

Second National Development Plan. The main objectives for the agro-industrial sector included increasing production, export and dam construction. Public investment in agriculture and irrigation amounted to 217.3 million US dollars (22.2% of total public investment).

1962 Development plan

Third National Development Plan. The main objectives of agricultural sector development included increasing production and supporting sustainable growth, as well as improving the standard of living in rural areas. Public investment for agricultural and irrigation development amounted to 630.7 million US dollars (23.1% of total public investment).

1963 Domestic policy

Land reform aimed at changing the ownership structure of agricultural land: redistribution of arable land from large landowners to smaller agricultural laborers. As part of the reform, agricultural cooperatives and farm corporations were established. The concept of farm corporations was introduced to address the problem of fragmented land ownership. Farm corporations were established on the basis of large-scale association of small farms. Membership in the corporations was compulsory. Farmers were required to transfer their land and receive shares in the corporation proportional to their landholding. Each farmer received a wage for his labor and dividends for his shareholding.

1968 Development plan

The Fourth National Development Plan also included increasing production and export, income distribution and improving rural livelihoods and setting aside 60-70,000 hectares for agribusiness. Public investment in agriculture and irrigation development amounted to 886.0 million US dollars (8.2% of the total public investments).

1969 Foreign policy

The Islamic Republic of Iran joined the Organization of Islamic Cooperation (OIC) in order to preserve and expand the social and economic value of Islamic countries to expand cooperation in socio-economic, geopolitical, cultural and scientific fields among member countries. Through the decisions of the Organization of Islamic Cooperation, other international organizations were established: the Islamic Development Bank, the Islamic Commission for Economic and Cultural Affairs, the Islamic Chamber of Commerce and Industry, the Islamic Trade Development Center, etc.

1971 Domestic policy

The Act on establishing cooperatives of farm producers allowing farmers to retain their title to land and emphasizing the adoption of community-based models of cultivation, cropping and marketing.

1973 Development plan

While implementing the fifth National Development Plan the priority for agricultural lending still remained at a low level (approximately 6% of the total amount of government loans). The main goals included in the industry's sector development program were developed with a consideration to expanding production and improving life in rural areas, alongside with the allocation of 300 thousand hectares of irrigated land for conducting agricultural business.

1977 Foreign policy

The Islamic Republic of Iran became the member of the International Fund for Agricultural Development (IFAD).

1989 Foreign policy

The first free trade zones and exclusive economic zones in Iran were created.

1991 Companies

Kalleh Dairy, one of the largest dairy producing companies in Iran and the Middle East was founded.

2004 Industry development

The 4th Five-Year National Plan for Economic, Social and Cultural Development of Iran. The main goals included the following areas: improving living conditions in rural areas, increasing the income level of farmers, increasing the competitiveness of Iranian goods in the domestic and foreign markets, creating mechanisms to remove obstacles to expanding non-oil exports, diversifying the economy, improving production infrastructure, increasing technical, economic and financial potential of cooperatives, facilitating their access to resources, information, technology, communication systems, supporting private sector investment in the agricultural sector, consumer subsidies for gasoline used for agricultural machinery and other measures to support the agricultural sector.

2005 Development plan

Adoption of Iran's strategic development plan "Vision 2025", aimed at making Iran the No.1 economy in the region and one of the leading economies in the world by 2025. This program also envisages investments of 3.7 trillion US dollars by 2025 and includes various important goals in culture, politics, economics, defense, education and the environment.

2011 Industry development

Within the framework of the 5th Five-Year National Plan for Economic, Social and Cultural Development of Iran key issues for the development of the agricultural sector included:

- food security and self-sufficiency in basic food products, basic agricultural crops and animal products;
- expansion of the agricultural sector and production efficiency, including increasing added value based on sustainable development, rational and efficient use of water resources,
- implementation of measures to create soil and water infrastructure, development of irrigation and drainage networks, introduction of modern irrigation methods and development of breeding activities;
- repair of agricultural machinery and replacement of old ones;
- increasing the competitiveness of agricultural production and export;
- introduction of tariffs on import (except for seeds, fertilizers and pesticides) of agricultural products in order to create favorable terms of trade in favor of domestic producers.

2017 Industry development

UNESCO Strategic Program for Socio-Economic Development for the Islamic Republic of Iran. Three pillars of the United Nations Development Assistance Framework (UNDAF): environment (natural resource management, low-carbon economy and climate change), health, sustainable economy (including food security, sustainable agriculture and improved nutrition).

2019 Foreign policy

Signing of the Memorandum between the Ministries of Agriculture of Russia, Kazakhstan and Iran on the issue of wheat supplies.

2022 Foreign policy

Publication of the UN Framework for Cooperation with the Islamic Republic of Iran in the field of sustainable development, developed with the participation of representatives of Iran, as well as FAO and other international organizations. Among the main areas of cooperation are: ensuring the sustainability of agriculture, combating insect pests that reduce its productivity, as well as reducing the use of harmful substances in the production of agricultural products.

2022 Domestic policy

Adoption of the 7th Five-Year National Plan for Economic, Social and Cultural Development of Iran declaring elimination of imbalances in the country's economy (including agricultural imbalances) as the key mid-term goal.

2023 Foreign policy

Agreement with FAO on the technical cooperation in implementation of project for cultivation of pistachios (Pistachio TCP) in the Razavi Khorasan, Kerman and Yazd provinces. The project was focused on enhancing the efficiency of pistachio production, promoting quality control mechanisms and expanding export capabilities of Iranian pistachio producers using the integrated crop management (ICM) method.

2.9.2.3. Overview of trends in the development of agro-industrial complex

Aiming at self-sufficiency

Over the past few years there has been a shift in the Iranian government focus from the short-term regulation of issues related to providing the Iran's population with food to the need to develop and implement long-term strategies for increasing the country's food self-sufficiency.

Sustainable development of agriculture

Taking into account difficult climatic conditions the key challenge for agricultural development is to improve water use efficiency and expand irrigation of agricultural land. The country's government is implementing large-scale projects on irrigation systems in several ostanes.

E-commerce development

A special Center for the E-commerce Development under the Ministry of Industry and Trade of Iran is responsible for development of e-commerce in the country. The Center coordinates the development and implementation of five national systems, including the government e-procurement system, comprehensive e-commerce system, electronic signature system, root certification authority and state intermediate certification authority.

Development of the “Blue Economy” — fish and seafood

Iran is the largest aquaculture producer in the Middle East. The Iranian Fishery Organization (“Shilat Iran”) under the Ministry of Agriculture Jihad is responsible for developing policy, planning and monitoring the sustainable exploitation of the country's water reserves and resources, protecting water resources and effective restoring available reserves, developing management and maintaining infrastructure for fisheries and aquaculture, increasing resources productivity and production factors. Scientific and applied research in this area is supervised by the Iranian Fisheries Science Research Institute (ISFRI).

2.9.2.4. Key agricultural producers

The largest agricultural holdings in Iran[13]

Iran Dairy Industries Co. (PEGAH)

Activities	Production, processing, distribution, import, export
Industry	Dairy
Description	The largest dairy producer in Iran. Established in 1954. Constitutes a production holding including over 20 companies engaging in livestock farming, production of raw materials and processed products, packaging and equipment for the dairy industry. The Company's share in the Iranian dairy market exceeds 30%. Iran Dairy Industries Co. is a state-owned company. 65% of the shares are owned by the Civil Servants Pension Fund of Iran. The Company's activities are coordinated by the Ministry of Cooperation, Labor and Social Security of Iran. The Company operates more than 15 processing plants across the country. The annual volume of raw milk supplied to the company's enterprises exceeds 1.2 million tons. The total processing capacity amounts to 5 thousand tons per day. The number of company employees exceeds 8 thousand people. The product line includes ultra-high-temperature processed milk, cheese, yogurt, pure milk, skimmed milk powder, whey and fermented milk drinks. The Company exports products to the countries of the Caspian region, Turkey, as well as to the countries of Central Asia
Contact Information	**Address:** No. 6, Joven Alley, End of Alvand St., Argentina Square, Tehran **Tel.:** +98 21 8878 0168 **E-mail:** Info@idicc.ir **Website:** https://pegahexport.com/

Solico Group

Activities	Production, processing, distribution, import, export
Industry	Dairy, confectionery, meat, ready-to-eat products
Description	Iranian food holding and the largest exporter of Iranian agricultural products. The Company was founded in 1973. Since 1977 engaged in the distribution of meat products. In 1978 the Company launched its own hamburger production. In 1991 Solico Group entered the dairy products market by founding Kalleh Amol Dairy Products company. The Company has been presented on the sauce market since 2005 and it has been producing soft drinks and confectionery products since 2009. Currently, Solico Group products are represented by more than 400 different brands. The holding owns 15 production sites. The number of its employees exceeds 25 thousand people. The company export products to more than 10 countries including Russia, the UAE, Turkey, Iraq, Afghanistan, etc.
Contact Information	**Address:** East Azerbaijan Ave. No.103, Tehran **Tel.:** +98 21 6647 5777 **E-mail:** info@solico-group.com **Website:** https://www.solico-group.com/

[13] According to the Industrial Management Institute of Iran: https://clck.ru/3AoXJA

Behshahr Industrial Company

Activities	Production, processing, distribution, import, export
Industry	Oil and fat
Description	One of the oldest fat-and-oil companies in Iran. The Company was founded in 1951. It operates a manufacturing plant with a capacity of 1200 tons per day. The Company's share in the Iranian oil and fat products market exceeds 40%. The product line includes sunflower oil, maize oil, soybean oil, rapeseed oil, margarine, confectionery fats, as well as solid oil and soap. The products are represented by Ladan, Golden Ladan, Bahar, Nesteren, Tard Sorkh, Shahpasand, Aafiat, Minola and Maral brands
Contact Information	**Address:** Kilometer 8 Fath Highway, Tehran **Tel.:** +98 216 6250 4357 **E-mail:** info@behshahr-ind.com **Website:** https://foodexiran.com/en/brand/behshahr/

Kourosh Food Industry

Activities	Production, distribution, import, export
Industry	Fruits and vegetables, oil and fat products
Description	Represents multi-profile food holding. Constitutes the part of Golrang Industrial Group conglomerate. The Company was founded in 2011. The main activities of the company include the production and processing of fat and oil products, as well as the production of dried fruits, nuts and snacks. The company is represented in the oil and fat products' market by Oila, Famila, Kimball and Suntin brands. The product line includes sunflower, rapeseed, sesame, olive and maize oil. Since 2017 the holding has been represented on the dates and dried fruits market by Kourosh Dried Fruit and Bobes Industry, its subsidiary. The Company operates processing sites with a capacity of 55 thousand tons. The product line includes dates, raisins, dried fruits, pistachios, nuts, tomato paste, potato chips and popcorn. The Company's head office is located in Tehran. Production plants are located in Ashtehard and Takestan
Contact Information	**Address:** No. 241 (Next to Nile St.), Mirdamad Blvd., Tehran **Tel.:** +98 218 3892 **E-mail:** info@kouroshoil.com **Website:** https://kouroshoil.com/en/

Minoo Industrial Group

Activities	Production, processing, distribution
Industry	Ready-to-eat products
Description	The Company produces confectionery products, snacks, soft drinks, sauces and jams. Minoo Industrial Group products distribution is carried out through its own network consisting of 22 distribution centers. In 2017 Minoo Fars Food Industries, a subsidiary company was registered to produce natural date-based products. It specializes in the production of date sugar, syrup, honey and vinegar. Moreover, the company launched the production of cheese snacks and popcorn
Contact Information	**Address:** Shiraz great industrial zone, Ebtekar Square, North Ebtekar St., 256 St. **Tel.:** +98 21 4883 1406 **E-mail:** info@minoofarsco.com **Website:** https://minoofarsco.com/en

Ajdad Zarbal Chicken Company

Activities	Production, processing, distribution
Industry	Meat
Description	The vertically integrated poultry holding founded in 1992. It is one of the first full-cycle poultry enterprises in Iran. The Company deals with raising broiler chickens, producing hatching and table eggs, slaughtering, producing and processing poultry meat. It operates two poultry farms, an incubation center and a poultry processing plant. Since 2021 Ajdad Zarbal Chicken Company is listed on the Tehran Stock Exchange
Contact Information	**Address:** No. 29, Nosrat Gharbi St., Tohid Square, Po Box 14185-514, Tehran **Tel.:** +98 21 628 7400 **E-mail:** info@zarbalgroup.com **Website:** https://zarbalgroup.com/

Ghiam Isfahan Agriculture & Livestock Company

Activities	Production, processing, distribution
Industry	Dairy
Description	A livestock and dairy enterprise founded in 1993 as a result of the Isfahan Agricultural Institute dissolution. The main scope of activity of the Company is livestock and milk production, as well as conducting agricultural and horticultural activities. Currently the company owns more than 10 thousand heads of productive livestock and produces up to 350 tons of raw milk per day. The Company's products are sold under Qiyam brand. Ghiam Isfahan Agriculture & Livestock Company also operates its own feed production facility with a capacity of 10 tons per hour
Contact Information	**Address:** Tehran Highway, 9 Km Alavijeh Road, P.O Box:83145-493 Isfahan, Esfahan **Tel.:** +98 338 04334 **E-mail:** ghiam@agriholding.ir **Website:** https://dastchin.ir/ad/ghiam_isfahan/

FKA Animal Husbandry and Agriculture Co.

Activities	Production, processing, distribution, export
Industry	Dairy, meat
Description	Iranian livestock holding founded in 1972 in Isfahan. The Company operates three livestock farms, including two dairy farms, with a livestock of 4.8 thousand heads, as well as a breeding farm of 3,000 heads. Moreover, the Company owns a feed-producing site with a capacity of 15 tons per hour. The Company owns more than 12% of the heavy milking cow population in Iran. The Company's own production of raw milk is equal to 60 thousand tons per year. FKA Animal Husbandry and Agriculture Co. also produces powdered milk. Besides its dairy activities the Company breeds and exports cattle to the Middle East. It is the first Iran's exporter of live animals. Other activities of the holding include the production of genetic material and organic fertilizers
Contact Information	**Address:** FKA farm, Special Road, After Masjed Al Ka'beh, 16 Km on Isfahan/Shiraz Road **Tel.:** +98 31 3654 8044 **E-mail:** info@fkaco.ir **Website:** https://fkaco.ir/home/en/

Pars National Agro-Industry and Animal Husbandry Company PJS

Activities	Production, processing, distribution
Industry	Grain, meat, dairy
Description	Agricultural holding founded in 1988 by Moghan Agriculture and Animal Husbandry Company and the National Bank of Iran. In 2007 the Company was transformed into a public joint-stock company. Since 2017 the holding's shares have been listed on the Tehran Stock Exchange. The land bank of Pars National Agro-Industry and Animal Husbandry Company PJS exceeds 90 thousand hectares. The Company specializes in cultivating crops such as wheat, corn, sorghum, soybeans, rapeseed, alfalfa, as well as fruits and vegetables. The Company also produces and sells seed material. The Company's activities also include beef stock and dairy farming. The cattle population consists of 1.4 thousand heads. The raw milk production amounted 15 thousand tons per year. The Company also operates its own feed-producing plant with a capacity of 10 tons per hour
Contact Information	**Address:** Pars Abad, Area Operations Project Road Ardabil, Ardabil **Tel.:** +98 45 3217 5047 **E-mail:** info@parsagroinc.ir **Website:** https://parsagroinc.ir/

Dizbad Group

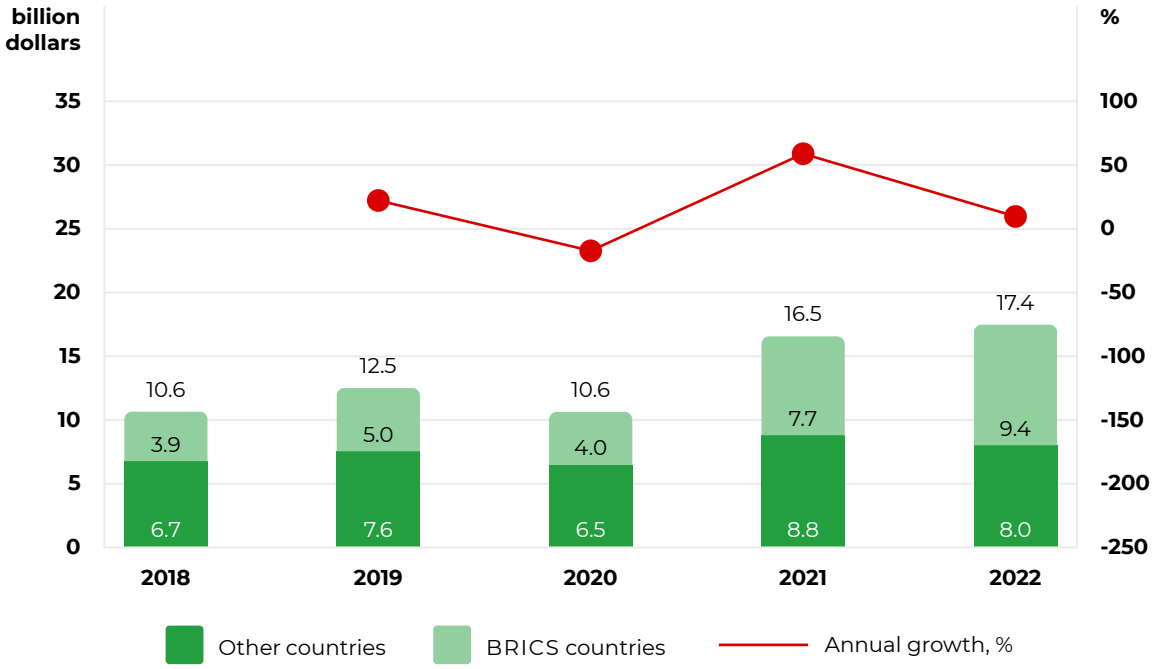
Activities	Production, processing, distribution, export
Industry	Meat
Description	Iranian poultry which belongs to the Kowsar Agricultural Investment Company holding specializing in agricultural investments. The Company deals broilers farming, slaughtering, processing and packaging of chicken meat and implements a "field-to-fork" strategy. The Company is represented by the Arian and Dizbad Mother Chicken brands in the Iranian market. Dizbad Group operates 20 poultry enterprises engaging more than 20 thousand employees. The Company is also an exporter of chicken meat, as well as live poultry to the Middle East countries
Contact Information	**Address:** Mashhad — Shahid Sadeghi Boulevard (Water Organization), Sadeghi 18th, No. 19, Unit 5 **Tel.:** +98 513 7628 8015 **E-mail:** dizbadcompany@yahoo.com **Website:** https://dizbadgroup.com/en/

2.9.3. Foreign trade in agricultural products

2.9.3.1. Import of agricultural products

In 2022 import of Iranian agricultural products amounted to 17.4 billion US dollars that is 5.5% (+906.3 million US dollars) higher than the level of 2021. In 2022 import from the BRICS countries increased by 21.1% (+1,628.2 million US dollars) compared to the previous year, while import from other countries decreased by 8.2% (-721.9 million US dollars). Import of agricultural products for 2018-2022 increased by an average of 13.1% per year.

Import of agricultural products of Iran, 2018-2022, billion US dollars



Source: ITC Trade Map

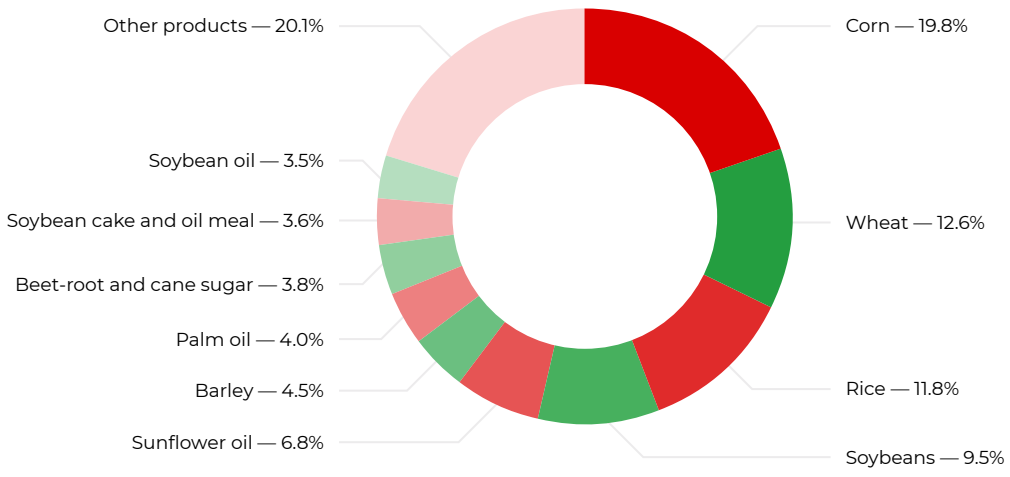
In 2022 the structure of Iran's import was dominated by corn (19.8%), wheat (12.6%) and rice (11.8%). The top 5 imported agricultural products also included soybeans (9.5%) and sunflower oil (6.8%). In total the top 10 commodity items accounted for 79.9% of import of Iranian agricultural products in value terms.

Import structure of Iranian agricultural products in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Corn	2,115.3	2,256.3	2,522.1	3,399.0	3,442.1	43.2	1.3
2	Wheat	0.3	147.3	919.3	2,486.5	2,186.8	-299.7	-12.1
3	Rice	1,628.5	1,694.3	932.1	731.0	2,056.0	1,325.0	2.8 times
4	Soybeans	1,161,1	934.3	1,048.4	1,451.7	1,661.9	210.1	14.5
5	Sunflower oil	521.9	549.5	535.2	1,358.1	1,182.6	-175.6	-12.9
6	Barley	602.8	1,015.6	465.5	1,004.7	791.0	-213.7	-21.3
7	Palm oil	290.3	318.3	303.5	531.9	689.2	157.2	29.6
8	Beet-root and cane sugar	102.7	642.4	370.7	545.1	658.8	113.8	20.9
9	Soybean cake and oil meal	651.2	993.4	793.9	1,274.3	632.6	-641.7	-50.4
10	Soybean oil	121.9	236.8	219.0	704.7	602.2	-102.5	-14.5
	Other products	3,425.2	3,740.5	2,455.3	3,008.6	3,498.7	490.1	16.3
	Total	**10,621.3**	**12,528.4**	**10,565.0**	**16,495.6**	**17,401.9**	**906.3**	**5.5**

Source: ITC Trade Map

Import structure of Iranian agricultural products in value terms, 2022, %



Source: ITC Trade Map

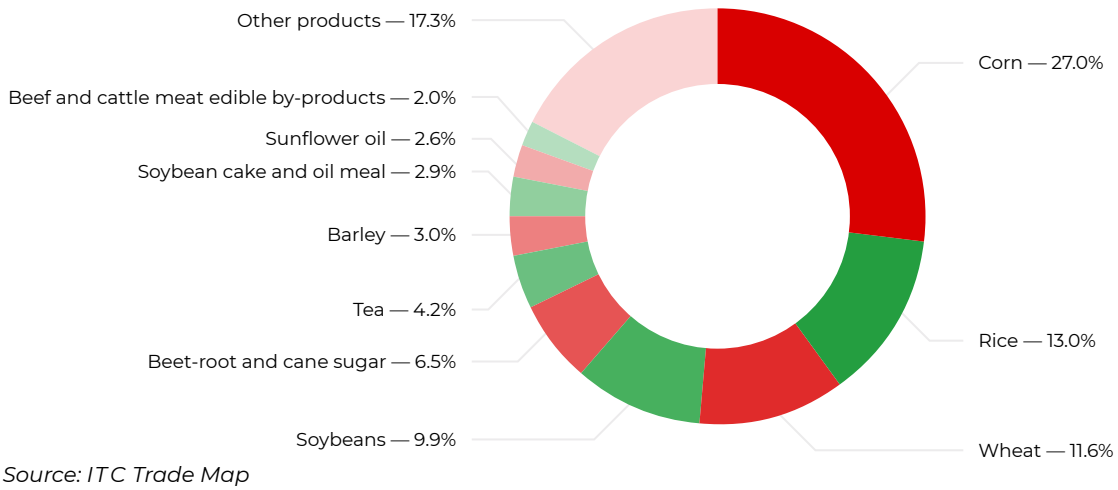
At the end of 2022 in the structure of Iran's import from the BRICS countries the main volume was corn (27.0% of import value), rice (13.0%) and wheat (11.6%). The top 5 imported agricultural products also included soybeans (9.9%) and beet and cane sugar (6.5%).

Import structure of Iranian agricultural products from the BRICS countries in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Corn	354.5	503.4	725.3	2,240.9	2,523.7	282.8	12.6
2	Rice	1,329.5	1,298.4	769.1	452.5	1,218.1	765.5	2.7 times
3	Wheat	0.2	55.4	343.0	1,306.9	1,080.8	-226.1	-17.3
4	Soybeans	42.8	88.4	228.5	551.2	924.7	373.6	1.7 times
5	Beet-root and cane sugar	48.6	482.3	325.8	385.1	609.4	224.3	1.6 times
6	Tea	194.2	300.7	234.5	240.4	394.8	154.3	1.6 times
7	Barley	234.0	325.4	216.5	343.0	283.2	-59.8	-17.4
8	Soybean cake and oil meal	116.5	274.2	81.2	387.6	268.0	-119.6	-30.9
9	Sunflower oil	212.7	186.0	205.4	503.9	247.2	-256.7	-51.0
10	Beef and cattle meat edible by-products	432.8	480.5	89.2	110.1	186.5	76.4	1.7 times
	Other products	931.1	982.9	830.4	1,204.2	1,617.6	413.4	34.3
	Total	**3,896.7**	**4,977.8**	**4,048.9**	**7,725.8**	**9,353.9**	**1,628.2**	**21.1**

Source: ITC Trade Map

Import structure of Iranian agricultural products from the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

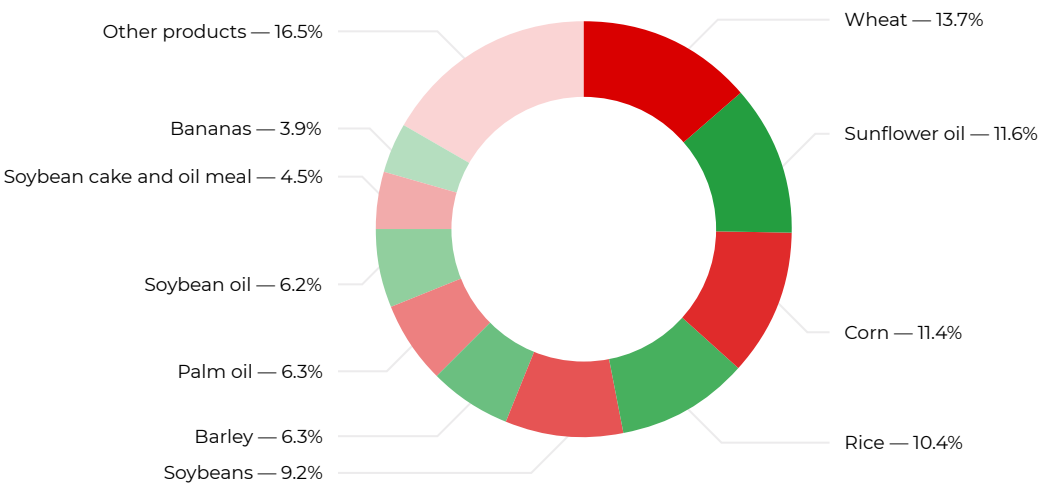
In 2022 the structure of import of Iranian agricultural products from other countries was dominated by wheat (13.7% of import value). The top 5 imported agricultural products also included sunflower oil (11.6%), corn (11.4%), rice (10.4%) and soybeans (9.2%)

Import structure of Iranian agricultural products from other countries in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Wheat	0.05	91.9	576.2	1,179.6	1,106.0	-73.6	-6.2
2	Sunflower oil	309.3	363.5	329.8	854.2	935.4	81.2	9.5
3	Corn	1,760.8	1,752.8	1,796.8	1,158.1	918.5	-239.6	-20.7
4	Rice	299.0	395.9	163.0	278.4	837.9	559.5	3.0 times
5	Soybeans	1,118.3	845.8	819.8	900.6	737.1	-163.4	-18.1
6	Barley	368.8	690.2	249.0	661.8	507.8	-154.0	-23.3
7	Palm oil	280.3	315.4	253.6	427.6	505.8	78.3	18.3
8	Soybean oil	110.8	211.6	205.0	619.4	496.0	-123.4	-19.9
9	Soybean cake and oil meal	534.8	719.1	712.8	886.7	364.6	-522.1	-58.9
10	Bananas	338.0	275.4	200.5	309.0	313.6	4.6	1.5
	Other products	1,604.4	1,889.0	1,209.5	1,494.5	1,325.2	-169.3	-11.3
	Total	**6,724.7**	**7,550.7**	**6,516.1**	**8,769.9**	**8,048.0**	**-721.9**	**-8.2**

Source: ITC Trade Map

Import structure of Iranian agricultural products from other countries in value terms, 2022,%



Source: ITC Trade Map

The BRICS countries accounted for 53.8% of Iran's total import of agricultural products in 2022. The main exporter of agricultural products to Iran in 2022 was the UAE which accounted for 34.1% of import. Large suppliers of agricultural products to Iran among the BRICS countries are also India (10.3%) and Russia (6.0%).

Among other countries the largest suppliers of agricultural products to Iran in 2022 were Türkiye (11.8% of import in value terms), the United Kingdom (4.9%), Switzerland (4.7%) and Pakistan (4.5%).

The main countries exporting agricultural products to Iran in value terms, 2018-2022, million US dollars

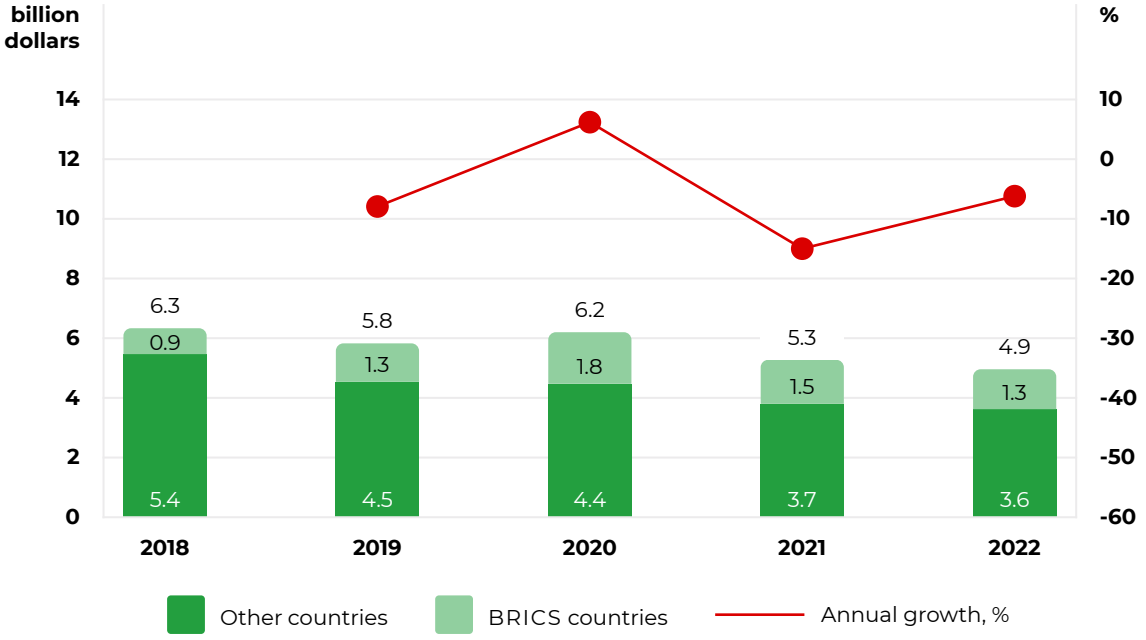
№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	UAE	991.9	1,280.1	1,689.8	4,974.0	5,940.9	966.9	19.4
2	India	1,636.2	2,125.6	1,222.1	812.4	1,786.8	974.5	2.2 times
3	Russia	667.1	850.9	725.3	1,320.1	1,052.5	-267.6	-20.3
4	Brazil	435.5	549.7	308.5	524.9	435.7	-89.2	-17.0
5	China	143.1	165.4	96.5	85.1	130.0	44.9	1.5 times
6	South Africa	0.6	1.1	2.0	2.1	5.5	3.4	2.6 times
7	Ethiopia	22.1	5.1	4.6	7.2	2.5	-4.7	-65.5
8	Egypt	0.2	—	0.1	0.1	0.1	0.004	4.7
	Total BRICS	**3,896.7**	**4,977.8**	**4,048.9**	**7,725.8**	**9,353.9**	**1,628.2**	**21.1**
1	Türkiye	556.1	2,291.1	1,848.1	1,974.2	2,050.2	76.0	3.8
2	United Kingdom	857.8	899.3	908.5	1,028.0	852.8	-175.1	-17.0
3	Switzerland	1,374.3	649.9	594.4	1,097.4	813.3	-284.1	-25.9
4	Pakistan	308.6	394.8	163.0	307.2	775.0	467.9	2.5 times
5	Netherlands	767.7	800.1	709.9	699.5	711.2	11.7	1.7
6	Germany	234.6	356.9	414.5	333.2	414.7	81.4	24.4
7	Singapore	754.9	469.3	491.4	329.5	380.8	51.3	15.6
8	Malaysia	125.0	123.4	122.5	261.8	343.4	81.6	31.2
9	Iraq	0.1	1.8	0.1	967.7	257.6	-710.1	-73.4
10	Oman	47.6	16.2	185.6	283.1	203.9	-79.2	-28.0
	Other countries	1,698.0	1,547.8	1,078.2	1,488.4	1,245.0	-243.3	-16.3
	Total non-BRICS	**6,724.7**	**7,550.7**	**6,516.1**	**8,769.9**	**8,048.0**	**-721.9**	**-8.2**
	Total	**10,621.3**	**12,528.4**	**10,565.0**	**16,495.6**	**17,401.9**	**906.3**	**5.5**

Source: ITC Trade Map

2.9.3.2. Export of agricultural products

Export of Iranian agricultural products in 2022 amounted to 4.9 billion US dollars, which is 6.5% (-341.5 million US dollars) below the level of 2021. In 2018–2022 Iranian export of agricultural products declined by an average of 6.1% per year.

Export of agricultural products of Iran, 2018-2022, billion US dollars



Source: ITC Trade Map

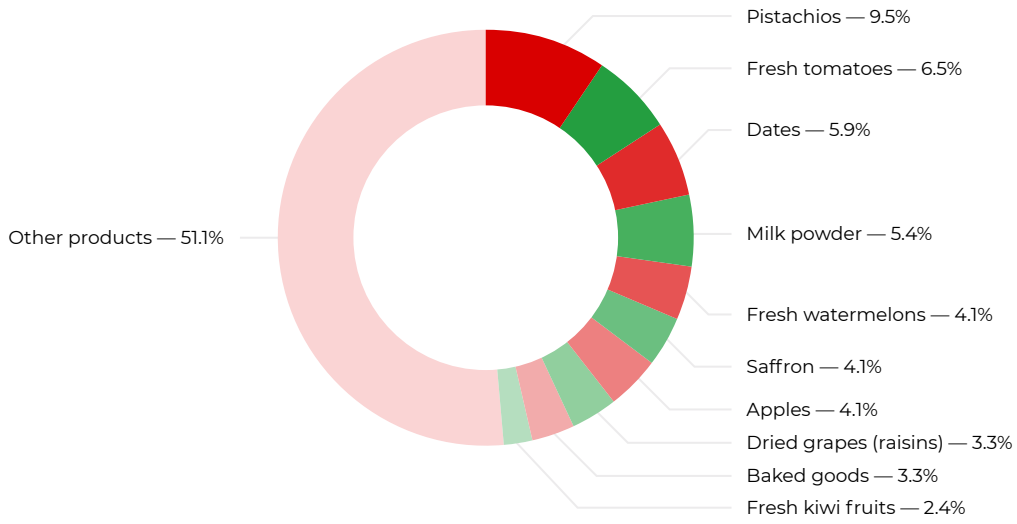
The main export products of Iran's agro-industrial complex in 2022 were pistachios (9.5%), fresh tomatoes (6.5%), dates (5.9%) and milk powder (5.4%). In total the top 10 exported types of products accounted for 48.9% of Iran's agricultural export by value.

Export structure of Iranian agricultural products in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Pistachios	461.9	981.4	1371.2	914.4	468.6	-445.8	-48.8
2	Fresh tomatoes	244.7	259.6	359.0	384.3	321.2	-63.1	-16.4
3	Dates	338.3	212.8	296.5	305.2	289.5	-15.7	-5.1
4	Milk powder	60.2	19.9	70.3	132.2	264.1	131.9	2.0 times
5	Fresh watermelons	158.0	179.1	156.8	208.6	201.9	-6.7	-3.2
6	Saffron	351.1	297.2	190.2	154.3	201.7	47.4	30.7
7	Apples	229.2	365.5	327.0	279.7	200.9	-78.8	-28.2
8	Dried grapes (raisins)	152.9	165.7	233.9	188.0	172.8	-15.2	-8.1
9	Baked goods	321.8	218.7	245.2	214.9	164.7	-50.2	-23.4
10	Fresh kiwi fruits	96.6	113.6	81.6	109.6	120.1	10.5	9.6
	Other products	3,897.7	2,991.0	2,831.0	2,367.2	2,511.5	144.3	6.1
	Total	**6,312.6**	**5,804.4**	**6,162.7**	**5,258.5**	**4,917.0**	**-341.5**	**-6.5**

Source: ITC Trade Map

Export structure of Iranian agricultural products in value terms, 2022, %



Source: ITC Trade Map

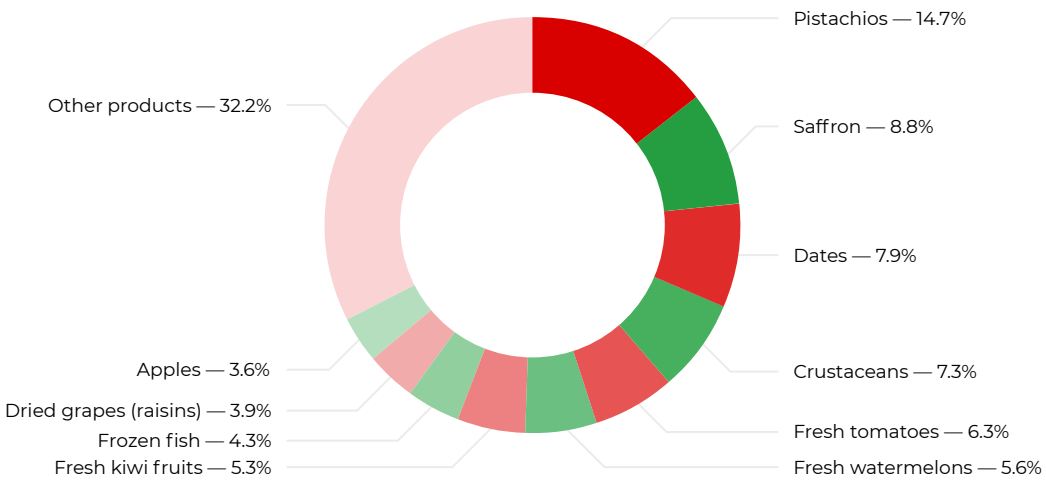
The main export products of Iran's agro-industrial complex to the BRICS countries in 2022 were pistachios (14.7%), saffron (8.8%), dates (7.9%) and crustaceans (7.3%). In total the top 10 exported types of products accounted for 67.8% of the Iranian agricultural export in value terms.

Export structure of Iranian agricultural products to the BRICS countries in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Pistachios	157.8	426.1	783.8	452.2	194.1	-258.0	-57.1
2	Saffron	105.7	78.1	56.1	97.4	116.1	18.7	19.2
3	Dates	107.3	74.0	83.7	102.7	104.8	2.1	2.0
4	Crustaceans	25.2	21.8	26.5	71.7	96.8	25.1	35.0
5	Fresh tomatoes	41.5	75.5	84.1	94.8	83.6	-11.2	-11.8
6	Fresh watermelons	30.9	36.6	49.5	67.5	73.6	6.1	9.1
7	Fresh kiwi fruits	57.5	71.8	46.8	66.9	70.1	3.2	4.7
8	Frozen fish	9.6	3.2	10.0	27.2	57.3	30.0	2.1 times
9	Dried grapes (raisins)	40.6	45.1	61.5	50.9	51.8	0.9	1.7
10	Apples	43.7	79.9	143.2	80.3	48.0	-32.3	-40.2
	Other products	264.6	370.2	405.3	397.6	425.1	27.5	6.9
	Total	**884.3**	**1,282.4**	**1,750.6**	**1,509.2**	**1,321.2**	**-188.0**	**-12.5**

Source: ITC Trade Map

Export structure of Iranian agricultural products to the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

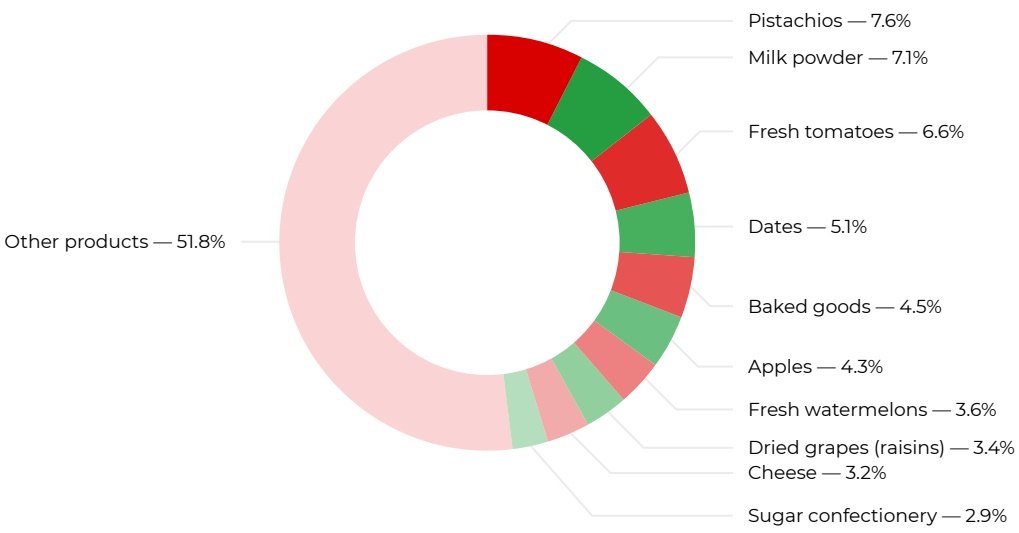
In 2022 the main Iranian agricultural products exported to other countries included pistachios (7.6%), powdered milk (7.1%), fresh tomatoes (6.6%) and dates (5.1%).

Export structure of Iranian agricultural products to other countries in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Pistachios	304.0	555.3	587.4	462.2	274.5	-187.8	-40.6
2	Milk powder	57.1	19.9	67.7	127.7	254.3	126.6	2.0 times
3	Fresh tomatoes	203.3	184.1	274.9	289.5	237.6	-51.9	-17.9
4	Dates	231.1	138.7	212.8	202.5	184.8	-17.7	-8.8
5	Baked goods	320.6	217.3	244.0	213.3	162.3	-51.0	-23.9
6	Apples	185.5	285.7	183.8	199.5	152.9	-46.5	-23.3
7	Fresh watermelons	127.1	142.5	107.3	141.1	128.2	-12.8	-9.1
8	Dried grapes (raisins)	112.4	120.6	172.4	137.1	121.0	-16.1	-11.7
9	Cheese	194.2	140.2	115.2	111.7	114.6	2.9	2.6
10	Sugar confectionery	216.1	138.2	152.5	129.0	103.1	-25.8	-20.0
	Other products	3,476.8	2,579.6	2,294.2	1,735.8	1,862.3	126.5	7.3
	Total	**5,428.3**	**4,522.1**	**4,412.1**	**3,749.3**	**3,595.8**	**-153.6**	**-4.1**

Source: ITC Trade Map

Export structure of Iranian agricultural products to other countries in value terms, 2022,%



Source: ITC Trade Map

The BRICS countries amounted to 26.9% of Iranian agricultural export in 2022. The largest BRICS countries importing agricultural products from Iran were the UAE (11.9% of export in value terms), Russia (7.4%), India (4.0%) and China (3.5%).

Among other countries importing agricultural products from Iran were: Iraq (30.3% of export), Pakistan (8.9%), Afghanistan (7.2%) and Türkiye (4.0%).

The main importing countries of agricultural products from Iran in value terms, 2018-2022, million US dollars

№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	UAE	461.0	504.2	484.5	526.3	585.0	58.7	11.2
2	Russia	216.6	371.8	427.4	346.8	363.4	16.6	4.8
3	India	173.1	184.3	266.5	290.0	194.3	-95.7	-33.0
4	China	29.4	217.7	566.6	339.0	174.0	-165.0	-48.7
5	Brazil	0.8	2.1	2.9	2.5	1.9	-0.6	-22.2
6	Ethiopia	—	—	0.0	1.2	1.4	0.2	21.3
7	Egypt	2.8	1.8	1.9	2.6	0.7	-1.9	-72.2
8	South Africa	0.6	0.6	0.7	0.8	0.3	-0.5	-65.4
9	Saudi Arabia	—	—	—	0.002	0.1	0.1	63 times
	Total BRICS	**884.3**	**1,282.4**	**1,750.6**	**1,509.2**	**1,321.2**	**-188.0**	**-12.5**
1	Iraq	2,620.4	2,034.0	1,744.0	1,485.5	1,488.1	2.6	0.2
2	Pakistan	398.2	255.7	392.1	429.3	435.9	6.7	1.6
3	Afghanistan	771.8	612.9	729.9	426.7	351.6	-75.1	-17.6
4	Türkiye	154.2	212.6	250.3	207.8	194.6	-13.2	-6.3
5	Germany	125.8	126.4	165.5	158.9	119.4	-39.4	-24.8
6	Azerbaijan	71.3	65.4	71.6	87.6	102.2	14.6	16.7
7	Kazakhstan	65.1	67.0	116.5	87.9	81.7	-6.2	-7.1
8	Qatar	80.6	106.0	80.7	69.9	77.9	8.0	11.4
9	Armenia	19.0	17.9	27.0	49.7	73.3	23.6	47.4
10	Turkmenistan	138.7	77.5	7.8	66.1	70.6	4.4	6.7
	Other countries	983.2	946.6	826.7	680.0	600.4	-79.6	-11.7
	Total non-BRICS	**5,428.3**	**4,522.1**	**4,412.1**	**3,749.3**	**3,595.8**	**-153.6**	**-4.1**
	Total	**6,312.6**	**5,804.4**	**6,162.7**	**5,258.5**	**4,917.0**	**-341.5**	**-6.5**

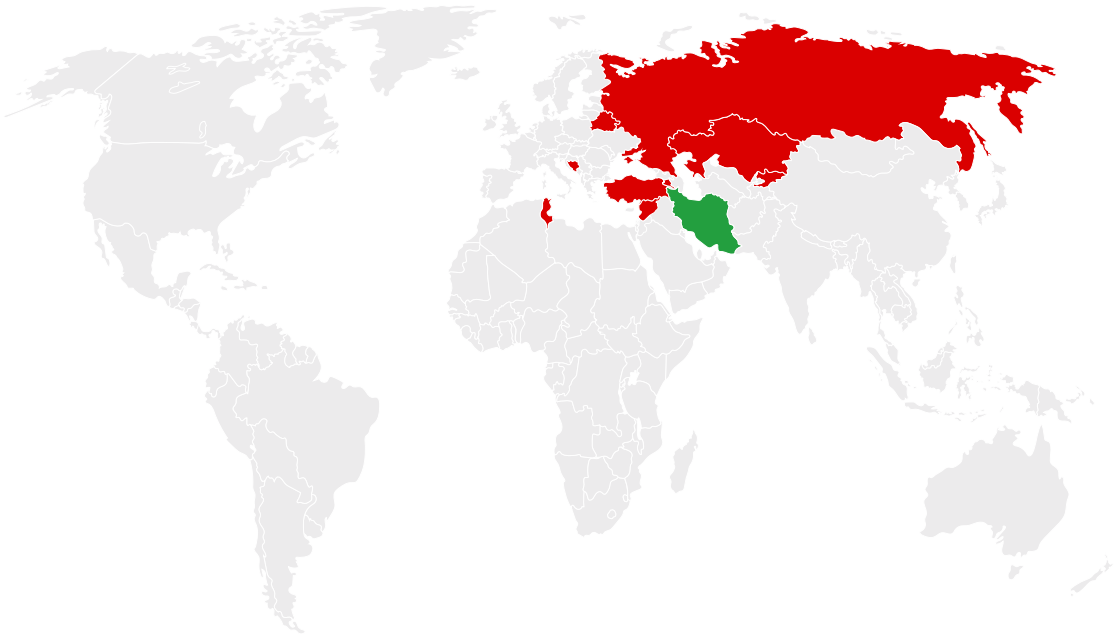
Source: ITC Trade Map

2.9.3.3. International cooperation

In May 2018 the EAEU and its member states signed an Interim Agreement with Iran focusing the formation of a free trade area. The Agreement came into force in October 2019. According to the terms and conditions its main difference from free trade agreements consists in reducing or eliminating import customs duties for a limited scope of goods (rather than almost all goods) while carrying out trade between the EAEU countries and Iran.

On December 25, 2023 a comprehensive Free Trade Agreement was signed between the EAEU and Iran. Upon the signing of the Agreement it was submitted to the ratification procedures required to make it effective. In addition to the Agreement signed with the EAEU Iran concluded a free trade agreement with Bosnia and Herzegovina, Syria, Tunisia, and Türkiye.

Iran trade agreements



State/association with which the Iran has entered into a preferential trade agreement	Effective date of the agreement
Tunisia	2008
Syria	2009
Bosnia and Herzegovina	2010
Türkiye	2015
EAEU	2019

2.9.3.4. Special economic zones

Iran has exclusive economic zones (EEZs) with a simplified import rules, making them a suitable hub for food supplies. EEZs are mainly located on the islands of Kish and Qeshm in the Persian Gulf, the port of Chekhbehar on the coast of Oman, in Arvand (Khuzestan Ostan) and in Anzali and Araswa (Gilan Ostan). There are no restrictions related to the import of foreign food products in these areas. These zones exhibit the necessary trading floors including shopping centers and chain stores. The EEZ established a fixed import duty of 4% on all food products. VAT tax does not apply to goods imported into the territory of the EEZ.

Products imported into Iran into SEZs are not subject to import duties provided they are sold within the SEZ or re-exported to other countries. It is worth noting that after the supply of food and other goods, a production procedure may follow, considered as the creation of added value of the product in the SEZ. All of this can then be imported into other parts of Iran at a greatly reduced tariff rate. Adding value to a product may involve packaging or processing of the product. In other words, goods produced (with added value) in the SEZ are subject to customs duties when imported into mainland Iran in proportion to the volume of non-Iranian raw materials and components used in their production.

2.9.3.5. Institutes for supporting the export of agricultural products

Trade Promotion Organization of Iran

Description	Trade Promotion Organization of Iran is a subordinate agency of the Ministry of Industry, Mine and Trade of Iran. It was founded in 1995 with the purpose of developing and expanding import and export, increasing the geography of foreign trade and ensuring the continuity of foreign trade activities. The Organization's activities are focused on the development of non-commodity trade
Main goals	• planning and implementation of the country's foreign trade policy; • promotion of Iranian products in foreign markets; • encouraging foreign investment; • increasing Iranian products supplies and sales in traditional markets. Entering new markets; • development of a knowledge base and competencies within the framework of foreign economic activity; • improving the qualifications of Iranian specialists in foreign economic activities; • increasing trade potential through the development of export-oriented infrastructure; • providing support measures and export incentives to the participants of foreign economic activities; • increasing the potential of e-commerce to enter foreign markets and developing export-oriented information technologies; • facilitation of foreign trade procedures
Contact details	**Address:** Tehran Province, Tehran, Chamran Expy **Tel.:** +98 212 1919 **E-mail:** info@tpo.ir **Website:** https://tpo.ir/

Innovation Center for the Exports of Agricultural Products, APEIC

Description	The first specialized innovation center in Iran implementing activities aimed at promoting innovation in agriculture with the purpose of the agricultural products export development. It was opened early 2024 in Zanjan province. The Center supports and develops innovative export-oriented projects in the field of agriculture, food industry, packaging and marketing of food products
Main goals	• conducting search and selection of innovative projects in the agricultural industry sector; • providing research, technological, information and marketing support to innovative export-oriented manufacturers; • formation of a measures system to support innovative companies exporting agricultural products, including tax exemptions and the provision of material resources; • establishing innovative export certification products laboratory within the Center's structure; • formation of a unified system intended for support of agricultural industry, scientific and technological development, as well as agricultural products export
Contact details	**Address:** Kilometer 3 of Zanjan-Qazvin highway, the eastern side of Iran Transfo factory, export terminal of agricultural product **Tel.:** +98 243 379 4440 **Website:** info@srpcomplex.com

Expert opinion

Eyosias Abera

Chief supply chain and logistics officer,
W.A. Oil Manufacturing and Distribution P.L.C.

Ethiopia is large agricultural producer, especially for grains and cereals, yet the country has to import huge volumes of agricultural products. Improving food security by increasing the production level is one of the main courses of action of the Ethiopian Government. In this regard, we expect that BRICS accession will help our country to access joint ventures FDI.

Investing in edible oil factories which are vertically integrated with oilseed farming is very promising for localizing food products as the country's most edible oil need is covered by importing processed sunflower and palm oil from abroad even though the country has a huge potential of growing the necessary oilseeds for producing edible oil.

The BRICS countries co-operation in agriculture is of strategic importance for the food security of both member countries and the worldwide. BRICS accounts for more than 30% of the world's agricultural land and more than 40% of cereal production. All this indicates the significant role of the association in the global food market, which, in my opinion, will grow over time.

2.10. Ethiopia

2.10.1. Social and economic profile

The Federal Democratic Republic of Ethiopia (Ethiopia) is located on the Horn of Africa peninsula, bordered by Kenya, South Sudan, Sudan, Djibouti, Eritrea and Somalia. It is the second most populous country in Africa after Nigeria. More than 100 million people live here. Unlike other countries on the continent, Ethiopia has never been colonized, except for a brief occupation by Italy from 1936 to 1941. Ethiopia was a founding member of the African Union.

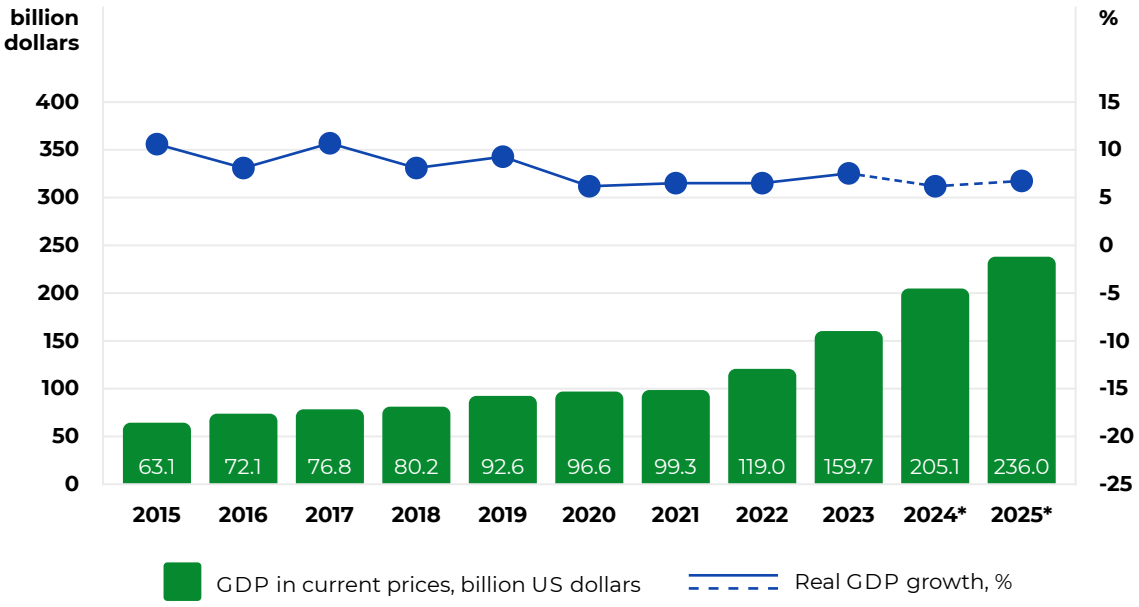
Ethiopian economy has experienced significant growth over the past decades, partly due to the development of the agricultural sector, which makes a significant contribution to the country's economy. 62.8% of the population is employed in agriculture, 6.5% in industry, and 30.7% in the service sector. Ethiopia's unemployment rate as of 2022 was 3.4%.

Ethiopia is one of the least urbanized countries in sub-Saharan Africa, with an urbanization level of 22.7%. The geographical diversity of landscapes leads to the prevalence of different agricultural systems, both highland and lowland.

Agriculture accounts for 37.6% of Ethiopia's GDP, while industry and services account for 22.7% and 36.6%, respectively. Agricultural products are the basis of the country's export — in 2022 they accounted for 90.0% of the total goods export volume in value terms. Import of agricultural products accounted for 23.9% of the total volume.

In 2023 GDP in current prices was 159.7 billion US dollars. Ethiopia's economy is growing rapidly. At the end of 2023 economic growth reached 7.2%. The IMF forecasts that Ethiopia will continue to experience strong economic growth of over 6.0% over the medium term.

Dynamics of Ethiopian GDP in current prices, 2015-2025

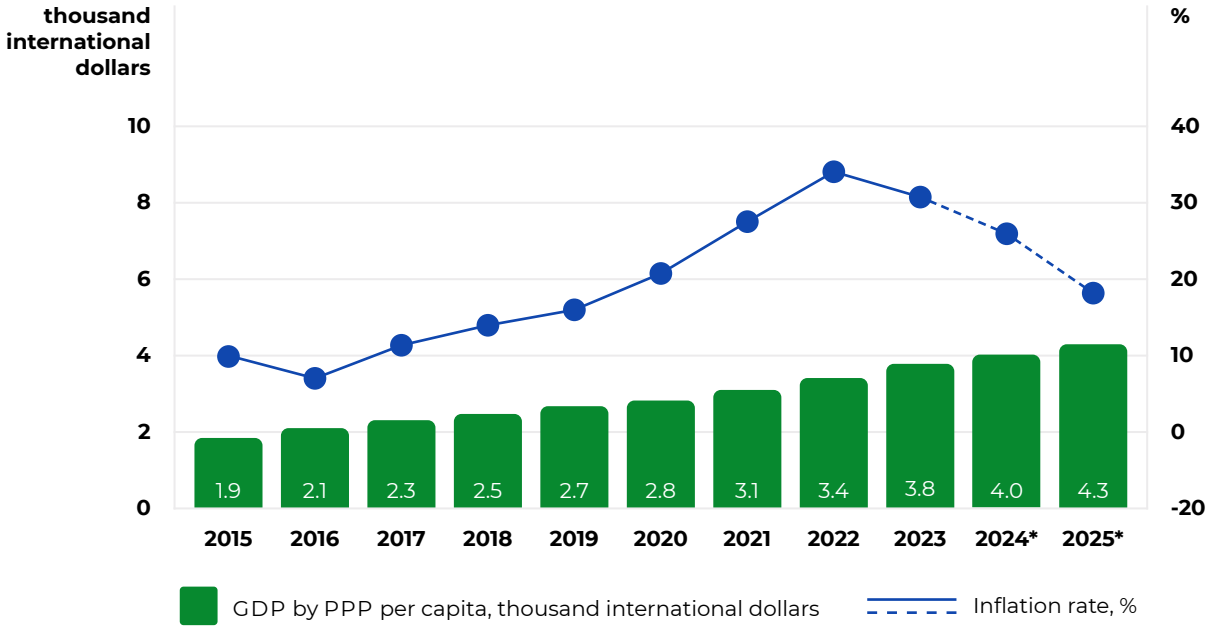


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

GDP by PPP per capita of Ethiopia in 2023 was 3.8 thousand international dollars. According to IMF forecasts by 2025 the indicator may increase to 4.3 thousand international dollars. The country is experiencing high inflation rates. In 2023 the consumer price growth rate was 30.2%. It is expected that in the medium term inflation in the country will decrease, but remain quite high, at 18.2% in 2025.

Dynamics of inflation and GDP by PPP per capita, 2015-2025

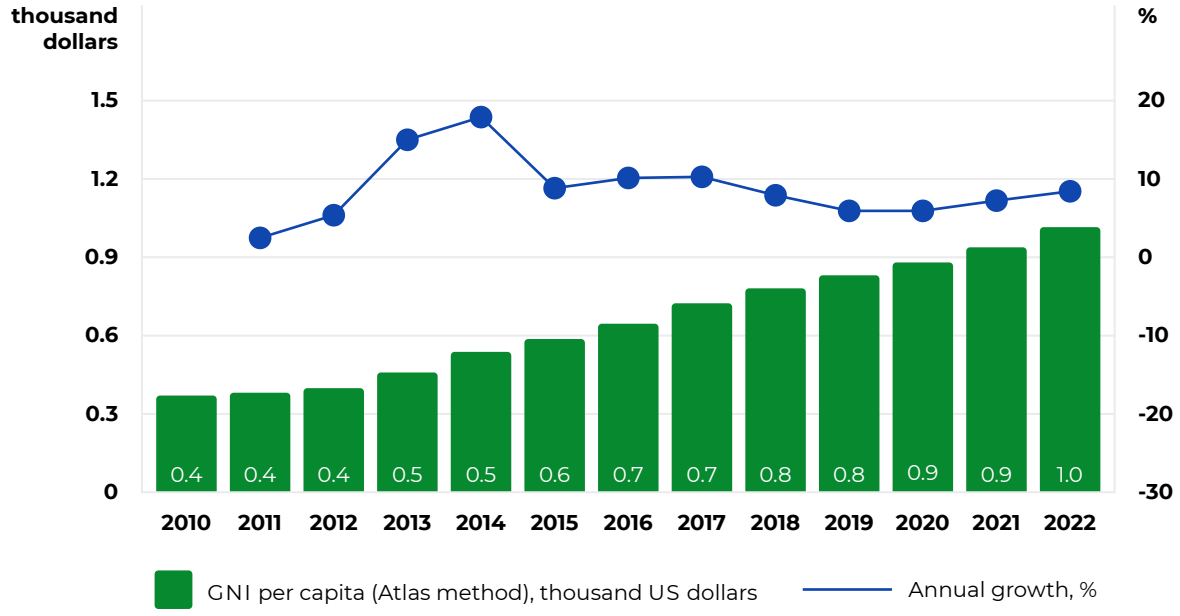


Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

According to the World Bank classification, in terms of GNI per capita using the Atlas method, Ethiopia is classified as a low-income country. In 2022 Ethiopia's GNI per capita was 1.0 thousand US dollars.

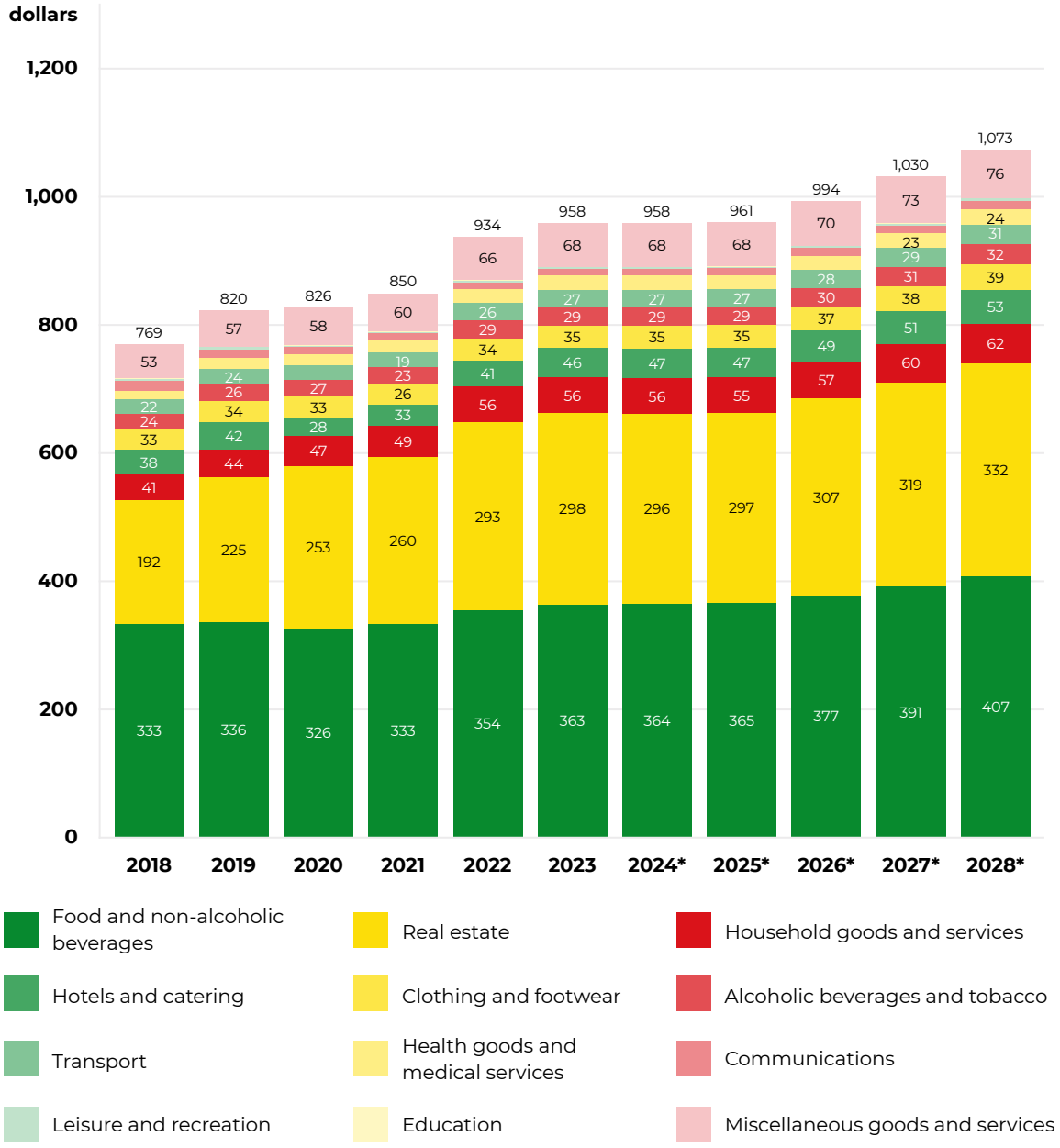
Dynamics of GNI per capita in Ethiopia, 2010-2022



Source: World Bank

Final consumption expenditures per capita in 2023 amounted to 958 US dollars in constant 2023 prices, which is 2.6% more than in 2022. The majority of expenditures were on food and non-alcoholic beverages — about 37.9%. Real estate expenses accounted for 30.1% and ranked second in the structure of final consumption expenditures. By 2028 final consumption expenditures per capita are projected to reach 1,073 US dollars, of which 407 US dollars will be spent on food and non-alcoholic beverages (37.9%).

Final consumption expenditures in Ethiopia per capita in constant 2023 prices, 2018-2028, US dollars



Source: Euromonitor International (Passport platform)

*Note. *forecast.*

2.10.2. Agriculture

2.10.2.1. Crop and livestock production

The largest production volumes are demonstrated by grain crops such as corn, wheat and sorghum. Total grain production in 2022 reached 30.4 million tons. Corn production in 2022 amounted to 10.2 million tons wheat to 5.8 million tons and sorghum to 4.1 million tons.

The country also produces significant volumes of vegetables, roots and tubers. In 2022 production volume was 5.7 million tons, of which the main ones were taro (1.7 million tons), potatoes (1.3 million tons) and sweet potatoes (1.0 million tons).

Banana production is actively developing in the country. The production increased from 501.5 thousand tons in 2018 to 1,096.0 thousand tons in 2022. Ethiopia is considered the birthplace of coffee, in 2022 coffee production amounted to 496.2 thousand tons.

Production of crop products, thousand tons

	2018	2019	2020	2021	2022
Cereals	**28,364.3**	**29,672.6**	**30,248.7**	**30,603.0**	**30,356.4**
Corn	10,119.8	9,635.7	10,022.3	10,751.0	10,200.0
Wheat	4,838.1	5,315.3	5,478.7	5,807.8	5,800.0
Sorghum	5,024.4	5,265.6	5,058.0	4,450.0	4,140.0
Vegetables, roots and tubers	**5,639.6**	**5,821.3**	**6,807.4**	**5,284.0**	**5,700.1**
Taro	1,588.5	1,452.8	2,328.0	1,426.9	1,690.6
Potato	933.1	924.5	1,141.9	1,309.6	1,294.3
Sweet potato	1,512.1	1,755.9	1,598.8	913.8	1,000.6
Legumes	**2,683.2**	**2,566.9**	**2,701.4**	**2,834.7**	**2,929.3**
Garden bean, dried	1,042.0	1,006.8	1,070.6	1,095.0	1,128.1
Beans, dried	563.9	485.5	552.6	612.6	619.1
Chickpeas	459.2	435.2	457.3	479.1	492.7
Bananas	**501.5**	**539.4**	**898.4**	**1,354.8**	**1,096.0**
Coffee	**494.6**	**482.6**	**584.8**	**545.6**	**496.2**

Source: FAOSTAT, USDA

Cow's milk production in Ethiopia at the end of 2022 amounted to 4.2 million tons, which is 7.4% higher than the previous year. The main types of meat produced in the country are beef (419.9 thousand tons in 2022), goat meat (137.7 thousand tons) and lamb (105.1 thousand tons). Pork is practically not produced. Production of fish and seafood amounted to 62.8 thousand tons in 2022. The production volume of chicken eggs in 2022 amounted to 1.15 billion pieces.

Livestock production

	2018	2019	2020	2021	2022
Chicken egg, billion pcs.	1.14	1.18	1.11	1.14	1.15
Cow's milk, thousand tons	3,284.5	3,895.3	4,693.0	3,866.1	4,151.5
Beef, thousand tons	400.0	419.7	445.8	414.8	419.9
Goat meat, thousand tons	109.7	141.9	147.1	127.9	137.7
Lamb, thousand tons	99.0	119.5	128.5	113.8	105.1
Fish and seafood, thousand tons	57.3	59.4	60.5	61.4	62.8

Source: FAOSTAT
*Note. *estimated.*

2.10.2.2. Overview of milestones in the agro-industrial complex

1945 Foreign policy

Ethiopia's accession to the International Monetary Fund (IMF).

1948 Foreign policy

Ethiopia's accession to the Food and Agriculture Organization of the United Nations (FAO).

1963 Foreign policy

Ethiopia's accession to the African Union, an international intergovernmental organization uniting 55 African states.

1975 Domestic policy

Adoption of a law on property rights to rural land, according to which private ownership of such lands was abolished. The cultivation, distribution and administration of rural land is the responsibility of local farming communities.

1981 Foreign policy

Membership of the Common Market for Eastern and Southern Africa (COMESA), an integration association in the form of a preferential trade area, which provides for the gradual creation of a free trade area, followed by a customs union and a common market.

1986 Foreign policy

Ethiopia's accession to the Intergovernmental Authority on Development (IGAD), a trading block of eight countries in East and Northeast Africa.

1993 Foreign policy

The end of the civil war, which resulted in the secession of an independent state, Eritrea. Ethiopia lost access to the sea.

1998 Companies

Founding of a large company Ethio Agri-CEFT, specializing in the production of coffee and tea, as well as cattle fattening.

2001 New institutions

Establishment of the Food Security Coordination Directorate.

2004 Companies

The launch of Delma Agribusiness, specializing in the export of legumes (chickpeas, peas). Products are purchased from Ethiopian farmers.

2010 Industry development

Adoption of the Structural Investment Policy of the Agrarian Sector.

2010 Companies

Founding of a state-owned Sugar Corporation, responsible for Ethiopian sugar industry.

2013 Foreign policy

Adoption of the Corn Industry Development Strategy.

2015 Industry development

Adoption of the Strategy for the Development of Value Chains in the legume segment, the goal of which is to create a unified legume industry.

2015 New institutions

Founding of the state organization Ethiopian Trading Businesses Corporation (ETBC), responsible for conducting tender procurements, including the import of agricultural products through tenders.

2017 Industry development

Adoption of the Agricultural Extension Strategy of Ethiopia, a national sectoral strategy for 2017-2030. Its main goal is to transform Ethiopian agriculture into a modern, commercially oriented agricultural sector.

2018 Industry development

Approval of the Strategy for post-harvest grain processing in order to increase profitability and reduce crop losses.

2020 Foreign policy

Resumption of negotiations on Ethiopia's accession to the World Trade Organization (WTO).

2021 Companies

In 2021 two large vegetable oil production enterprises, Belayhneh Kinde and WA Oil Factory, began operating in Ethiopia. The entry of these players into the market increased the level of domestic demand coverage by local production from 10% to 40%.

2021 Foreign policy

An agreement on the African Continental Free Trade Area was signed and the creation of special economic zones was initiated, offering investors tax incentives and reduced customs duties.

2022 Industry development

Approval of the National Dairy Development Strategy for 2022-2030, aimed at improving the genetic potential of dairy breeds, feed provision, increasing biosecurity and the quality of herd health management, improving the quality and safety of milk, enhancing dairy business management, attracting investment in commercial farming and processing industry.

2024 Industry development

The expansion of the Agricultural Extension Strategy of Ethiopia includes: the National Food Safety and Quality Strategy for Primary Agricultural Products, the National Nutrition Sensitive Agri-food System Strategy and the Post-Harvest Management Strategy.

2.10.2.3. Overview of trends in the development of agro–industrial complex

Aiming at self-sufficiency

Ethiopia is a major agricultural producer, including cereal crops. However, the country still has to import significant volumes of agricultural products, including wheat, while exports are poorly diversified, with coffee accounting for the majority of foreign shipments. The policy of improving food security by increasing national agricultural productivity is one of the main priorities of the Ethiopian government. In particular, the Development Plan 2021-2030 notes the role of the agricultural sector in combating poverty and improving the citizens' well-being, as well as providing the population with food, creating a raw material base for the industrial sector and strengthening the country's position in international trade by diversifying exports and its volumes, including agricultural goods. Increasing production volumes in the agro-industrial sector is also one of the key objectives set out in the National Food and Nutrition Strategy. One of the main measures to increase productivity and achieve self-sufficiency in major crops is the creation of irrigation systems. Currently, a significant proportion of farmers depends on rainfall, which limits the ability to increase production rates. The development of artificial irrigation is also indicated as a government priority. A key focus is the creation of irrigation systems for growing wheat in order to reduce dependence on imports of this crop.

Sustainable development of agriculture

Among the major challenges facing Ethiopia, the National Food and Nutrition Plan highlights the high proportion of the country's citizens suffering from malnutrition and low nutritional quality of consumed products. In addition to work on creating artificial irrigation systems to improve the sustainability of the country's agricultural sector, the government has set goals to promote the use of natural fertilizers, reduce carbon dioxide emissions into the atmosphere and increase carbon content in the soil. These measures should help create conditions in Ethiopia to ensure food security for the population, including by meeting the need for high nutritional products. Activities aimed at sustainable agriculture and reduction of the impact of climate change on the country's food system are particularly significant.

Minimizing production and consumption waste

Ethiopia experiences extremely high rates of crop loss, which also poses a significant threat to the country's food security and forces the government to focus on implementing better practices to reduce losses and waste. As part of the implementation of these measures, the Post-Harvest Management Strategy was presented in April 2024.

2.10.2.4. Key agricultural producers

The largest agricultural holdings in Ethiopia[14]

Ethio Agri CEFT

Activities	Production, processing, distribution, import, export
Industry	Grain, oil and fat, fuits and vegetables, ready-to-eat products
Description	One of the largest private agricultural companies in Ethiopia. The company was founded in 1998 and is part of the MIDROC Ethiopia Investment Group Company. The main activity is related to the production and processing of agricultural products. The company owns 13 farms throughout the country, one tea processing and sorting plant and one processing plant for other types of products. Ethio Agri CEFT has the largest tea plantations in Ethiopia, grows pulses, oilseeds, fruits, vegetables, cotton, etc. The company also engages in fattening and processing of cattle meat
Contact Information	**Address:** Gurd Sholla, Addis Ababa **Tel.:** +251 116 67 6204; +251 116 73 4234 **E-mail:** info@ethioagriceft.com.et **Website:** https://www.ethioagriceft.com.et/

Belayneh Kinde Group

Activities	Production, processing, distribution, import, export
Industry	Oil and fat, fruits and vegetables
Description	A group of companies founded in 2005. The main areas of activity are trade, hotel business, agriculture, manufacturing, construction, transport and real estate. One of the group companies, Phibela Industrial PLC is engaged in the processing of edible oils and owns one of the largest edible oil processing plants in Africa. The Phibela industrial complex is capable of producing 1.5 million liters of palm and sunflower oil per day. The group of companies also owns 19 thousand hectares of land where coffee, sesame, soybeans, sunflowers, fruits and vegetables, as well as seasonal crops, are cultivated
Contact Information	**Address:** MK Business Center 6th Floor, Churchill Road, Piassa Addis Ababa **Tel.:** +251 111 11 8740 **E-mail:** info@bkgethiopia.com **Website:** https://www.bkgethiopia.com/index.html

[14] According to ratings : Land Matrix 10 Biggest Agribusiness Companies in Ethiopia (10 Biggest Agribusiness Companies in Ethiopia): https://clck.ru/3BAfhD; African Growth and Opportunity Act Major Ethiopian Export Product Exporters (Address List of Major Ethiopian Export Product Exporters): https://clck.ru/3BAfoD; Food Business Africa Top 100 Food Companies in Africa 2020 (Top 100 Food Companies in Africa 2020: Celebrating An Industry in Transformation): https://clck.ru/3BAfpR

Awash Wine

Activities	Production, processing, distribution
Industry	Wine
Description	One of the oldest wineries in Ethiopia. The company owns 2 wineries, 1 distribution center in the capital city, Addis Ababa, and a 517-hectare farm, of which 225 hectares are vineyards. The company's products account for 90% of the country's market. The company's product range includes white and red wines, as well as wine cocktails
Contact Information	**Address:** Lideta, Sub City W. 02 House #1000 **Tel.:** +251 993 92 1670 **E-mail:** info@awashwine.com **Website:** https://www.awashwines.com/

Horizon Plantations PLC

Activities	Production, processing, export
Industry	Oil and fat, fruits and vegetables, ready-to-eat products
Description	Horizon Plantations PLC was founded by Sheikh Mohamed Hussein Ali Al-Amoudi from Saudi Arabia and Ethiopian investor Ato Jemal Ahmed Abdishikur in 2009. The company is owned by the investment group Midroc. The main activities are related to the production, processing and export of agricultural products such as coffee, spices, fruits, vegetables, pulses, sunflower, peanuts, sesame, honey, etc. Horizon Plantations PLC owns more than 50% of Ethiopia's coffee plantations
Contact Information	**Address:** Lesotho St, Mekanisa Abo, Addis Ababa **Tel.:** +251 113 69 8189 **E-mail:** info@horizonplantationsplc.com **Website:** https://horizonplantationsplc.com/

Feed Green Ethiopia Exports PLC

Activities	Production, processing, export
Industry	Oil and fat, grain, spices
Description	One of the largest food exporting companies in Ethiopia. The headquarters is located in Addis Ababa, Ethiopia. Feed Green Ethiopia Exports PLC is engaged in the production, packaging and export of products such as traditional Ethiopian spices, long-life products, grains, oilseed products, etc. The company exports its products to the markets of North America, Europe, the Middle East, Southeast Asia, Africa, Australia and New Zealand
Contact Information	**Tel.:** +251 911 258388 **E-mail:** feedgreenethiopia@gmail.com **Website:** https://feedgreenethiopia.com/

Mullege Coffee Export

Activities	Production, processing, distribution, export
Industry	Ready-to-eat products
Description	The company is one of the leading coffee exporters in Ethiopia. The company was founded in 1953 as a small coffee supplier and by 1996 had grown into a major exporter. Currently, Mullege Coffee Export has clients in 27 countries across four continents. The company owns two large plants located in the Ethiopian capital city, Addis Ababa, that process green coffee beans, with fully equipped logistics operations. The annual production capacity is 22 thousand tons of coffee. The company owns a high-tech warehouse capable of storing more than 5 thousand tons of coffee, as well as 45 trucks that transport coffee from the warehouse to ports for further distribution
Contact Information	**Address:** 8th Floor Mullege Building Center, Addis Ababa **Tel.:** +251 11 442 5972 **E-mail:** contact@mullege.com **Website:** https://mullege.com/

Ahadu PLC

Activities	Production, processing, distribution, export
Industry	Grain, legumes, ready-to-eat products
Description	A large agricultural company. It was founded in 1992. The company's main activities are distribution of consumer goods, pharmaceuticals, real estate, production and processing of agricultural products, export of grains, legumes and coffee. Ahadu PLC distributes Unilever products in Ethiopia. The company owns 5,000 hectares of land, 1,000 hectares of which are devoted to the production of tea, coffee, soybeans, corn, red pepper and sesame. The company produces cookies and tea under its own brands
Contact Information	**Address:** P.O.Box 100448, Addis Ababa **Tel.:** +251 11 629 8816 / 17 / 18 **E-mail:** info@ahadugroup.com **Website:** https://www.ahadugroup.com/index.html

Tadesse Desta Business Group

Activities	Import, export, processing, logistics
Industry	Ready-to-eat products, legumes
Description	One of the leading Ethiopian companies, annually exporting approximately 400 containers (8,000 tons) of green Arabica coffee beans. The company was founded in 2003. The company exports to the markets of Europe, Australia, North America and the Middle East. The company's coffee suppliers are farms throughout the country. Tadesse Desta owns a coffee cleaning and storage plant covering an area of 3,000 square meters. The plant is equipped with modern coffee processing machines with a capacity of 3 tons per hour. In addition, the company owns a freight transportation service. Besides coffee, Tadesse Desta also exports sesame seeds and beans
Contact Information	**Address:** Kirkos Sub City, Afework Building, 9th Floor, Office No. 9B, Addis Ababa **Tel.:** +251 115 58 03 83 / 97 **E-mail:** tadessedesta26@yahoo.com; tadessecoffeeexp@gmail.com **Website:** https://tadessedesta.com/

C.G.F Business Group Pr. Ltd.

Activities	Production, export
Industry	Legumes, ready-to-eat products
Description	A large Ethiopian business conglomerate founded in 2004. The company specializes in the export of agricultural products, including coffee, oilseeds and legumes. In addition, CGF Business Group Pr. Ltd. is engaged in the production of non-food products. The main export destinations for agricultural products are Asia, Europe and the Middle East. The company has its own plants in several cities of the country. The factories are equipped with high-tech machinery for processing coffee, sesame and legumes with a capacity of 150-250 tons per day
Contact Information	**Address:** Baleker Building, 6th Floor, Office Number 601, Next to Gotera Condominium, Addis Ababa **Tel.:** +251 114 166 270 **E-mail:** info@cgfbusinessgroup.com **Website:** https://cgfbusinessgroup.com/

Haicof Limited PLC

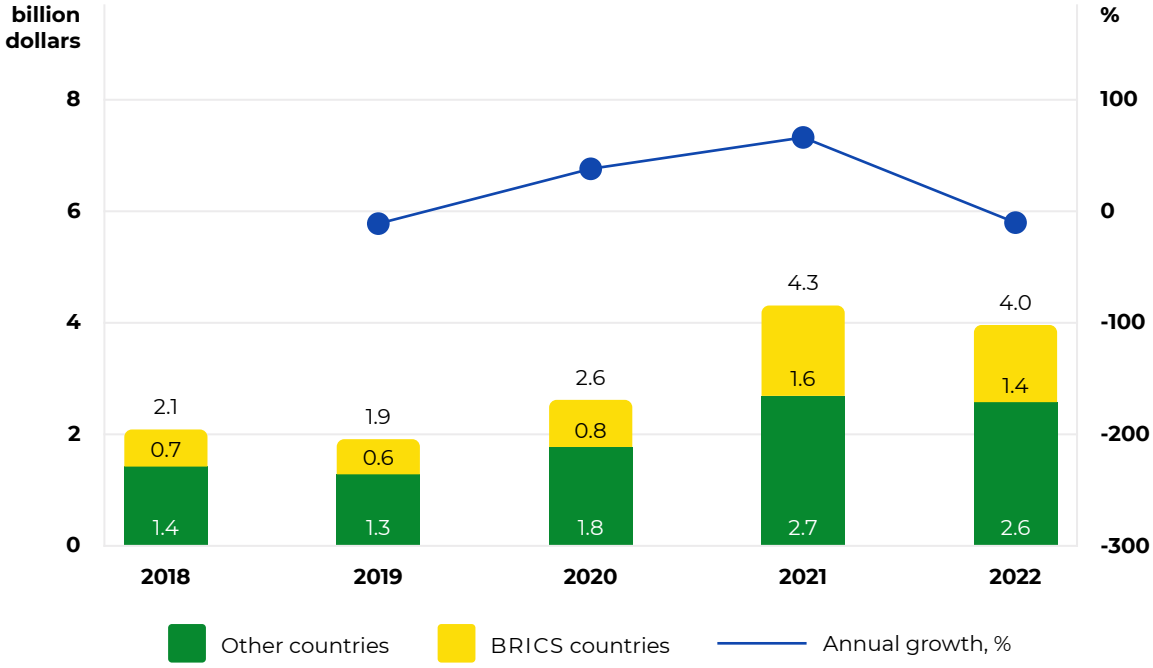
Activities	Processing, export
Industry	Ready-to-eat products
Description	Large processor and exporter of coffee. The company was founded in 1966. Haicof Limited PLC supplies various types of coffee to the markets of Europe and the USA. Founder of the company, Hailu Gebre Hiwot, was the first to export one of the world's highest quality coffee varieties, Yirgacheffe, from the region of the same name in Ethiopia. The company is one of the founders of the Ethiopia Commodity Exchange and has a permanent place on it. Haicof Limited PLC owns a coffee purification complex with an area of 5,000 sq. m
Contact Information	**Address:** Kirkos Sub City, Woreda 8, #214 Addis Ababa **Tel.:** +251 911 21 0170; +251 911 24 2486 **E-mail:** coffee@haicof.com **Website:** https://haicof.com/index.php

2.10.3. Foreign trade in agricultural products

2.10.3.1. Import of agricultural products

In 2022 import of Ethiopian agricultural products amounted to 4.0 billion US dollars, which is 8.5% (-368.6 million US dollars) lower than in 2021. The average annual growth rate of import volumes for 2018-2022 was 17.3% per year. The BRICS countries accounted for 34.8% of Ethiopia's total agricultural product import in 2022.

Import of agricultural products of Ethiopia, 2018-2022, billion US dollars



Source: ITC Trade Map

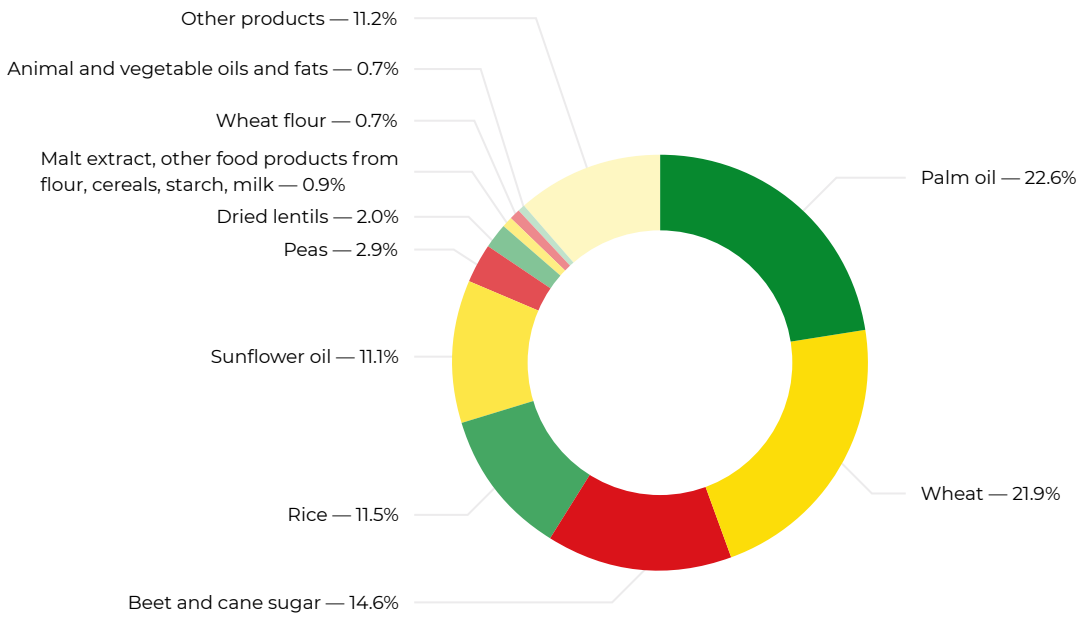
At the end of 2022 the structure of agricultural product import of Ethiopia was dominated by palm oil (22.6% of import value) and wheat (21.9%). The top 5 imported agricultural products also included beet and cane sugar (14.6%), rice (11.5%) and sunflower oil (11.1%). In total the top 10 commodity items accounted for 88.8% of import of Ethiopian agricultural products in value terms.

Import structure of Ethiopian agricultural products in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Palm oil	478.0	265.6	424.1	883.1	893.8	10.7	1.2
2	Wheat	372.6	459.7	431.2	938.6	865.4	-73.3	-7.8
3	Beet and cane sugar	310.1	184.3	337.6	581.6	577.3	-4.3	-0.7
4	Rice	257.2	203.0	317.5	686.5	453.7	-232.9	-33.9
5	Sunflower oil	74.5	138.6	383.9	444.7	437.9	-6.8	-1.5
6	Peas	24.3	29.3	48.2	92.2	115.2	23.0	25.0
7	Dried lentils	0.4	36.1	55.8	57.9	78.2	20.3	35.1
8	Malt extract, other food products from flour, cereals, starch, milk	29.6	30.9	33.6	41.8	36.1	-5.7	-13.5
9	Wheat flour	27.5	40.6	22.3	108.8	28.5	-80.3	-73.8
10	Animal and vegetable oils and fats	23.5	16.2	26.6	14.3	27.3	13.0	1.9 times
	Other products	489.4	503.0	532.6	473.5	441.0	-32.5	-6.9
	Total	**2,087.2**	**1,907.3**	**2,613.5**	**4,323.0**	**3,954.4**	**-368.6**	**-8.5**

Source: ITC Trade Map

Import structure of Ethiopian agricultural products in value terms, 2022, %



Source: ITC Trade Map

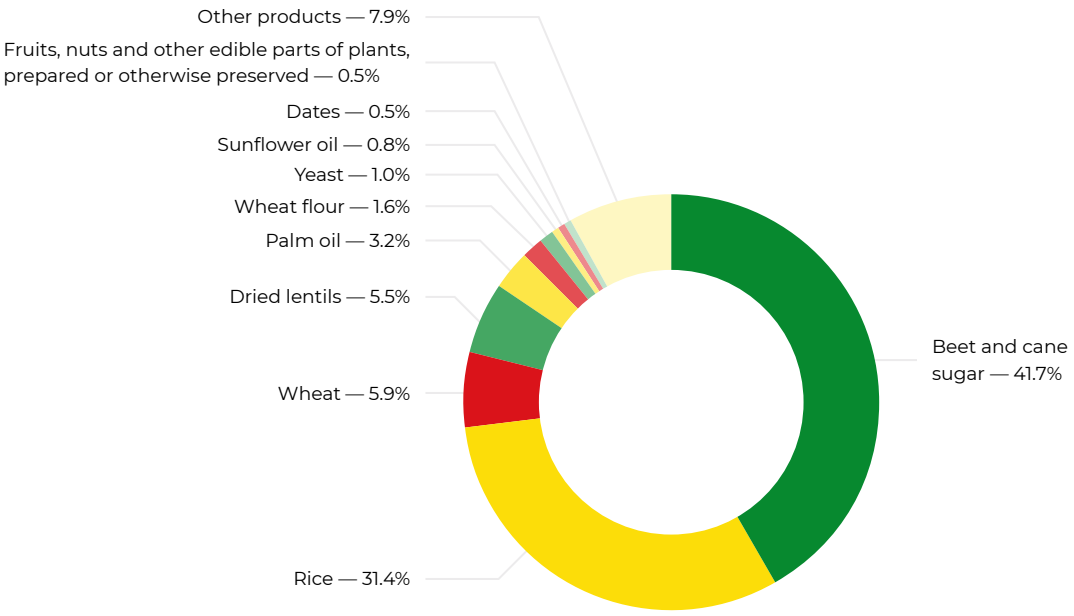
The structure of Ethiopia's agricultural products import from the BRICS countries in 2022 was dominated by beet and cane sugar (41.7% of import value) and rice (31.4%). Wheat (5.9%), dried lentils (5.5%) and palm oil (3.2%) also occupied prominent positions.

Import structure of Ethiopian agricultural products from the BRICS countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Beet and cane sugar	204.2	183.8	334.9	580.8	573.9	-6.9	-1.2
2	Rice	229.8	163.6	282.6	668.0	431.9	-236.2	-35.4
3	Wheat	98.4	71.6	29.1	142.0	81.5	-60.5	-42.6
4	Dried lentils	0.3	30.3	39.2	52.6	75.6	23.0	43.6
5	Palm oil	23.8	5.4	3.3	31.6	43.4	11.8	37.4
6	Wheat flour	23.6	11.9	10.8	36.8	22.4	-14.4	-39.2
7	Yeast	10.5	14.3	11.0	15.2	13.4	-1.8	-12.0
8	Sunflower oil	5.3	7.4	5.3	5.9	11.2	5.4	1.9 times
9	Dates	3.4	4.0	4.7	6.0	7.3	1.2	20.5
10	Fruits, nuts and other edible parts of plants, prepared or otherwise preserved	3.0	1.0	0.2	0.4	7.1	6.7	20.0 times
	Other products	94.3	141.5	122.6	109.6	108.9	-0.7	-0.6
	Total	**696.6**	**635.0**	**843.8**	**1,648.9**	**1,376.5**	**-272.4**	**-16.5**

Source: ITC Trade Map

Import structure of Ethiopian agricultural products from the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

In the structure of Ethiopia's agricultural products import from other countries in 2022 the main volume was occupied by palm oil (33.0% of import value), wheat (30.4%) and sunflower oil (16.6%). In total the top 10 positions accounted for 90.0% of the import volume.

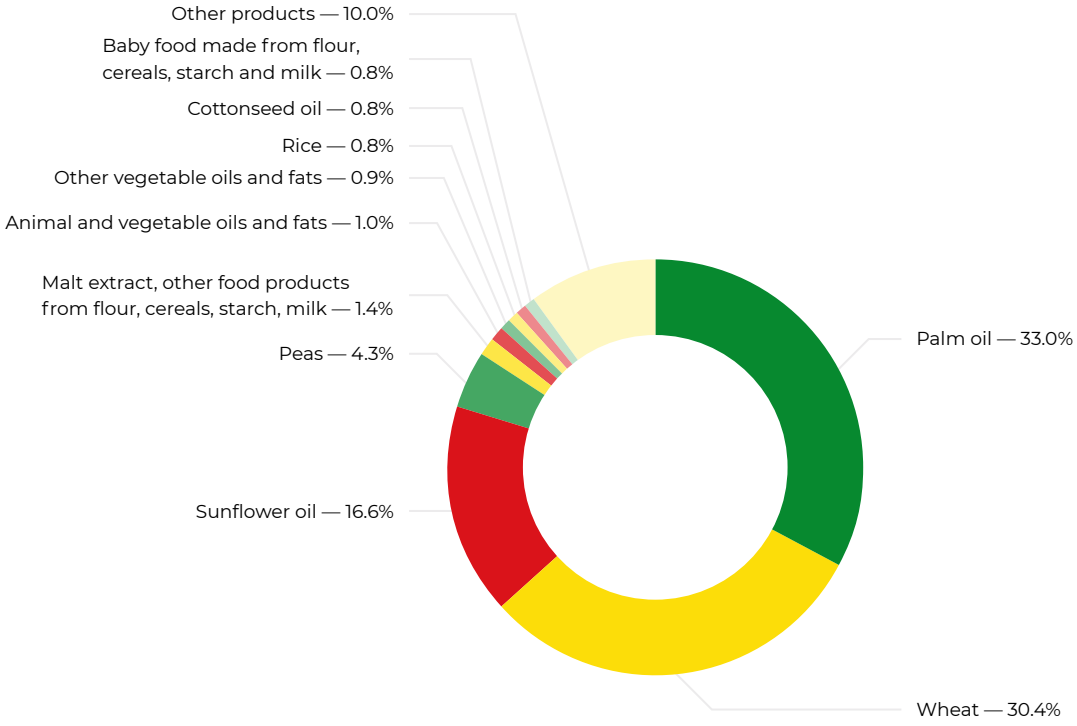
Import structure of Ethiopian agricultural products from other countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Palm oil	454.2	260.2	420.8	851.5	850.4	-1.1	-0.1
2	Wheat	274.2	388.1	402.0	796.7	783.9	-12.8	-1.6
3	Sunflower oil	69.2	131.2	378.6	438.9	426.7	-12.2	-2.8
4	Peas	24.3	28.9	46.4	89.8	111.0	21.1	23.5
5	Malt extract, other food products from flour, cereals, starch, milk	27.2	28.3	31.0	40.3	35.3	-5.0	-12.5
6	Animal and vegetable oils and fats	22.1	15.7	26.5	14.3	27.1	12.8	1.9 times
7	Other vegetable oils and fats	0.1	0.3	2.0	32.3	22.7	-9.5	-29.5
8	Rice	27.4	39.4	34.9	18.5	21.8	3.3	17.6

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
9	Cottonseed oil	—	—	10.4	0.8	21.6	20.8	27.0 times
10	Baby food made from flour, cereals, starch and milk	33.2	14.9	11.9	10.4	19.6	9.2	88.1
	Other products	458.8	365.2	405.2	380.6	258.0	-122.6	-32.2
	Total	**1,390.6**	**1,272.3**	**1,769.7**	**2,674.1**	**2,577.9**	**-96.1**	**-3.6**

Source: ITC Trade Map

Import structure of Ethiopian agricultural products from other countries in value terms, 2022, %



Source: ITC Trade Map

The largest exporter of agricultural products to Ethiopia in 2022 was India. Indian supplies exceeded 1.1 billion US dollars and accounted for 28.5% of the total import volume. Among the BRICS countries notable supplies were carried out by Egypt and the UAE.

The main suppliers of agricultural products to Ethiopia among other countries in 2022 were the USA (14.7% of import value), Malaysia (11.4%), Turkey (10.8%) and Djibouti (8.9%).

The main countries exporting agricultural products to Ethiopia in value terms, 2018-2022, million US dollars

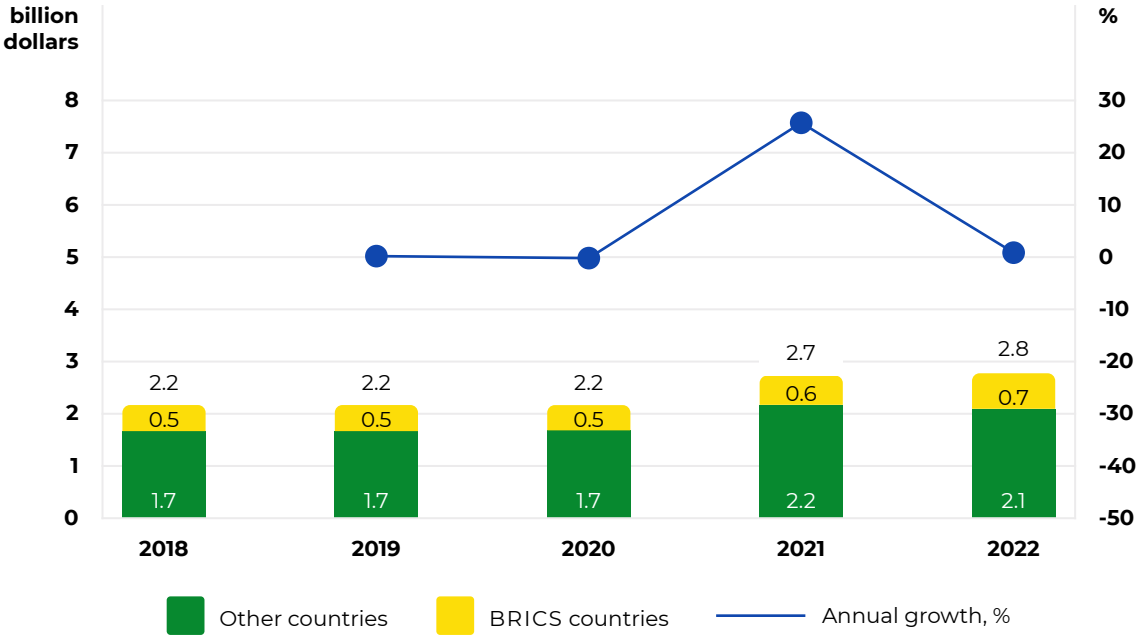
№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	India	364.2	354.4	621.3	1,344.7	1,128.8	-215.9	-16.1
2	Egypt	54.5	65.1	49.2	49.0	70.8	21.8	44.6
3	UAE	96.7	39.5	47.1	50.8	67.6	16.8	33.0
4	Russia	91.4	66.8	28.0	129.3	30.9	-98.4	-76.1
5	China	30.5	37.3	26.2	33.8	30.0	-3.8	-11.3
6	Saudi Arabia	18.4	12.7	15.2	17.4	23.3	5.9	34.2
7	South Africa	15.2	51.6	44.0	14.4	12.5	-1.9	-13.0
8	Brazil	25.7	7.6	12.8	9.4	11.5	2.1	22.9
9	Iran	0.0	0.1	0.1	0.2	1.1	0.9	5.4 times
	Total BRICS	**696.6**	**635.0**	**843.8**	**1,648.9**	**1,376.5**	**-272.4**	**-16.5**
1	USA	192.6	241.2	315.3	388.3	581.2	193.0	49.7
2	Malaysia	300.8	145.5	216.5	585.2	449.1	-136.1	-23.3
3	Türkiye	128.1	143.1	381.1	495.2	426.6	-68.6	-13.9
4	Djibouti	0.2	23.3	52.5	186.2	351.5	165.3	1.9 times
5	Ukraine	55.8	183.2	147.8	477.7	235.9	-241.9	-50.6
6	Argentina	9.1	7.5	104.7	2.6	114.9	112.3	44.0 times
7	Indonesia	162.9	100.0	210.6	105.1	73.2	-31.8	-30.3
8	Kenya	4.0	5.7	7.6	25.8	53.8	28.0	2.1 times
9	France	58.9	42.2	41.9	40.5	36.6	-3.9	-9.6
10	Bulgaria	16.1	40.3	9.9	27.1	34.3	7.2	26.6
	Other countries	462.2	340.4	281.6	340.4	220.8	-119.6	-35.1
	Total non-BRICS	**1,390.6**	**1,272.3**	**1,769.7**	**2,674.1**	**2,577.9**	**-96.1**	**-3.6**
	Total	**2,087.2**	**1,907.3**	**2,613.5**	**4,323.0**	**3,954.4**	**-368.6**	**-8.5**

Source: ITC Trade Map

2.10.3.2. Export of agricultural products

Export of Ethiopian agricultural products in 2022 amounted to 2.8 billion US dollars, which is 0.9% (+24.7 million US dollars) higher than in 2021. In 2022 export to the BRICS countries increased by 13.1% (+76.2 million US dollars) compared to the previous year; export to other countries decreased by 2.4% (- 51.5 million US dollars). Over the period from 2018 to 2022 Ethiopian agricultural export increased at an average annual rate of 6.0%.

Export of agricultural products of Ethiopia, 2018–2022, billion US dollars



Source: ITC Trade Map

The main export product of Ethiopia's agricultural sector in 2022 was coffee (54.5%). The top 5 export items also included other fresh vegetables (8.4%), cut flowers (8.3%), sesame seeds (6.6%) and beans (4.0%). In total the top 10 exported products accounted for 91.0% of Ethiopia's agricultural export by value.

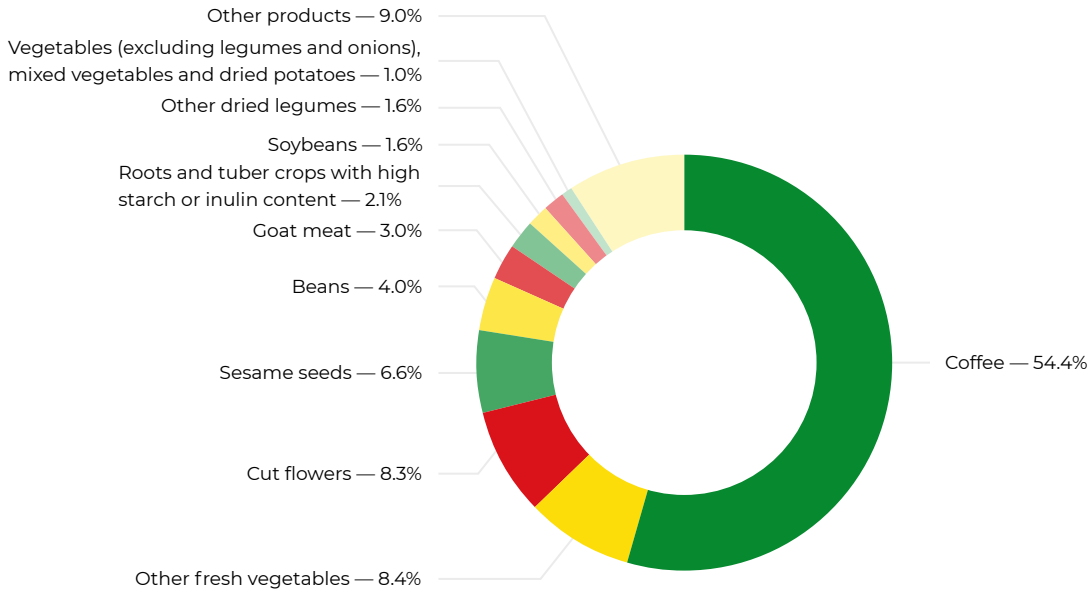
Export structure of Ethiopian agricultural products in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Coffee	794.5	795.6	795.8	1,189.2	1,513.2	324.0	27.2
2	Other fresh vegetables	279.0	280.6	258.6	270.2	231.7	-38.5	-14.2
3	Cut flowers	199.3	200.0	190.2	254.5	229.5	-25.0	-9.8

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
4	Sesame seeds	334.5	314.7	361.7	286.0	182.5	-103.5	-36.2
5	Beans	125.8	119.5	119.7	103.0	111.1	8.2	7.9
6	Goat meat	85.9	69.9	61.8	86.4	82.2	-4.2	-4.9
7	Roots and tuber crops with high starch or inulin content	0.0	25.6	72.3	129.6	57.4	-72.2	-55.7
8	Soybeans	42.7	68.9	39.0	43.3	44.7	1.4	3.3
9	Other dried legumes	41.8	24.0	35.3	47.0	43.9	-3.0	-6.5
10	Vegetables (excluding legumes and onions), mixed vegetables and dried potatoes	15.0	15.7	13.5	13.8	27.3	13.4	2.0 times
	Other products	278.9	281.5	237.4	326.9	251.0	-75.9	-23.2
	Total	**2,197.4**	**2,196.0**	**2,185.3**	**2,749.9**	**2,774.6**	**24.7**	**0.9**

Source: ITC Trade Map

Export structure of Ethiopian agricultural products in value terms, 2022, %



Source: ITC Trade Map

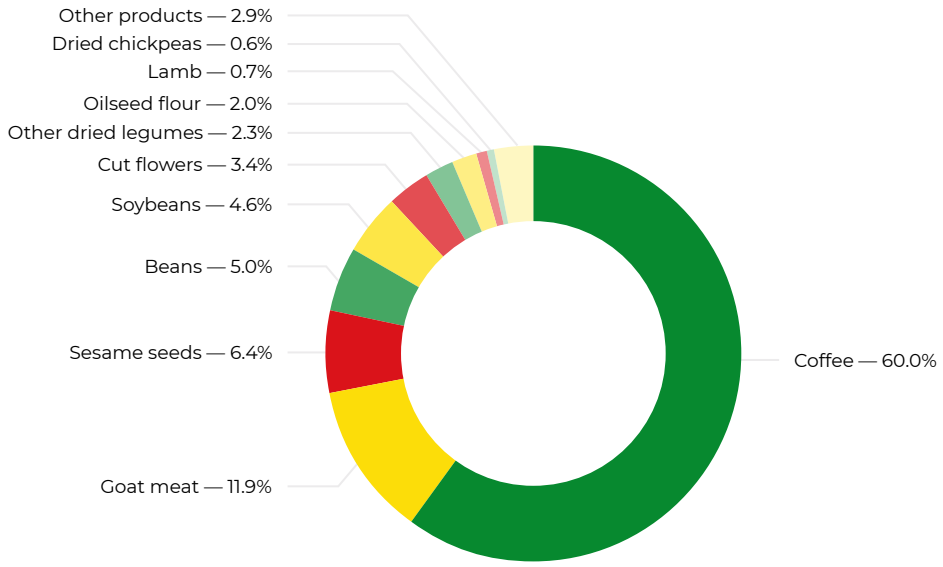
The main export product of Ethiopia's agro-industrial complex to the BRICS countries in 2022 was also coffee (60.0%). Goat meat (11.9%), sesame seeds (6.4%), beans (5.0%) and soybeans (4.6%) also occupied prominent positions.

Export structure of Ethiopian agricultural products to the BRICS countries in value terms, 2018–2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Coffee	146.9	153.8	175.8	235.7	395.0	159.3	67.6
2	Goat meat	84.4	68.2	61.6	83.3	78.3	-5.0	-6.0
3	Sesame seeds	135.9	116.1	139.7	79.7	42.3	-37.3	-46.9
4	Beans	31.3	39.2	29.5	38.5	32.7	-5.7	-14.9
5	Soybeans	32.0	58.1	19.6	32.6	30.5	-2.1	-6.4
6	Cut flowers	17.0	18.6	15.9	26.3	22.6	-3.7	-14.2
7	Other dried legumes	2.1	0.7	5.9	11.4	15.3	3.9	34.6
8	Oilseed flour	0.3	0.6	0.2	8.2	13.3	5.1	62.1
9	Lamb	2.4	1.8	2.2	3.2	4.7	1.6	49.3
10	Dried chickpeas	23.2	19.6	8.9	24.8	4.0	-20.7	-83.8
	Other products	34.7	43.7	23.9	38.3	19.2	-19.1	-49.8
	Total	**510.1**	**520.4**	**483.3**	**581.9**	**658.1**	**76.2**	**13.1**

Source: ITC Trade Map

Export structure of Ethiopian agricultural products to the BRICS countries in value terms, 2022, %



Source: ITC Trade Map

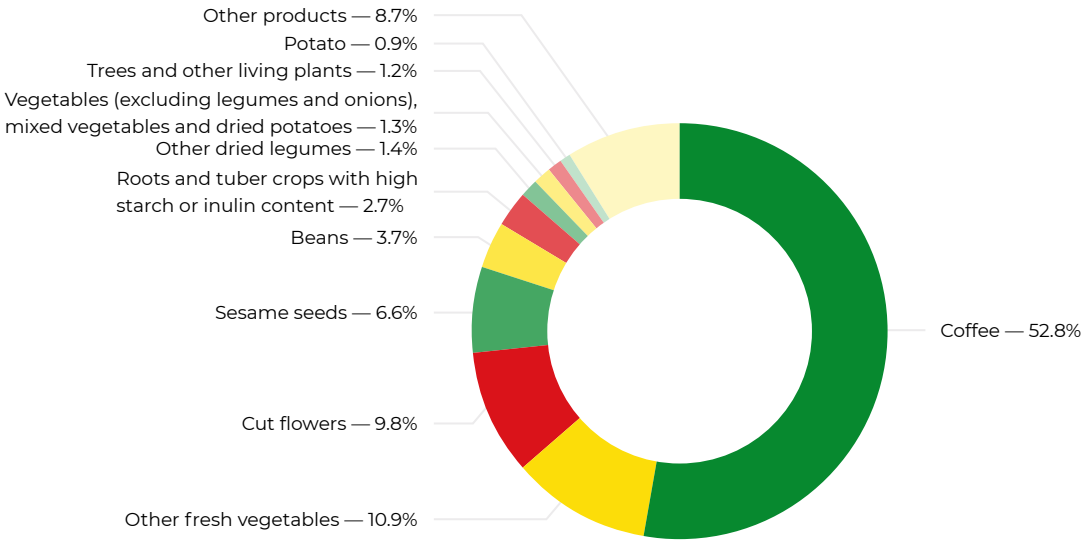
In the structure of Ethiopian agricultural products supplies to other countries in 2022 coffee accounted for 52.8% of export value. Major agricultural export also included other fresh vegetables (10.9%), cut flowers (9.8%), sesame seeds (6.6%) and beans (3.7%). In total the top 10 exported products accounted for 97.3% of Ethiopia's agricultural export by value.

Export structure of Ethiopian agricultural products to other countries in value terms, 2018-2022, million US dollars

№	Name	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Coffee	647.6	641.8	620.0	953.5	1,118.2	164.7	17.3
2	Other fresh vegetables	279.0	280.6	258.6	270.2	231.7	-38.5	-14.2
3	Cut flowers	182.3	181.4	174.4	228.2	206.9	-21.3	-9.3
4	Sesame seeds	198.6	198.6	222.0	206.3	140.2	-66.1	-32.1
5	Beans	94.5	80.3	90.2	64.5	78.4	13.9	21.5
6	Roots and tuber crops with high starch or inulin content	0.0	25.6	72.3	129.6	57.4	-72.2	-55.7
7	Other dried legumes	39.7	23.3	29.4	35.6	28.6	-7.0	-19.6
8	Vegetables (excluding legumes and onions), mixed vegetables and dried potatoes	13.9	14.7	12.8	12.7	26.6	13.9	2.1 times
9	Trees and other living plants	27.2	26.0	26.3	35.3	25.6	-9.7	-27.4
10	Potato	18.5	12.1	7.2	11.7	19.1	7.3	62.4
	Other products	186.0	191.3	188.9	220.3	183.7	-36.5	-16.6
	Total	**1,687.3**	**1,675.6**	**1,702.0**	**2,168.0**	**2,116.5**	**-51.5**	**-2.4**

Source: ITC Trade Map

Export structure of Ethiopian agricultural products to other countries in value terms, 2022, %



Source: ITC Trade Map

The largest importing countries of agricultural products from Ethiopia among the BRICS countries in 2022 were Saudi Arabia, which accounted for 9.6% of total export in value terms and the UAE with 7.0%. The BRICS countries together accounted for 23.7% of Ethiopia's total agricultural export.

Among other countries the largest importing countries were Somalia (9.5%), Germany (8.9%), the USA (8.2%) and the Netherlands (7.7%).

The main importing countries of agricultural products from Ethiopia in value terms, 2018–2022, million US dollars

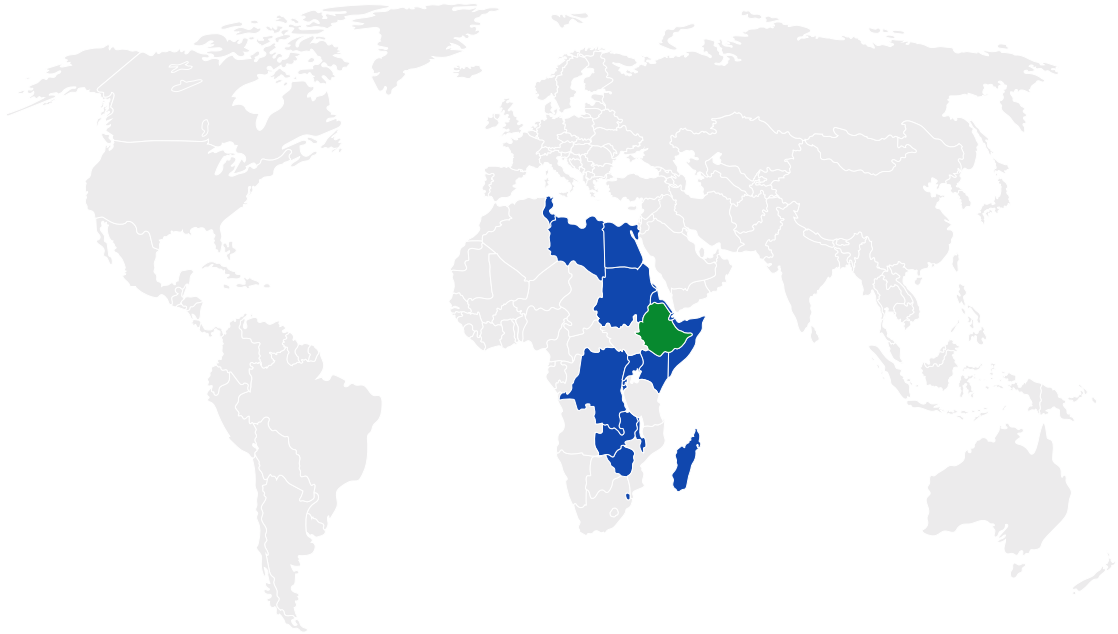
№	Country	2018	2019	2020	2021	2022	2022/2021	
							million US dollars	%
1	Saudi Arabia	180.6	176.9	186.8	215.1	267.4	52.3	24.3
2	UAE	107.0	122.1	161.3	178.1	195.3	17.2	9.6
3	China	122.8	73.9	63.8	60.9	96.6	35.8	58.8
4	India	58.8	102.3	44.5	91.5	72.8	-18.7	-20.4
5	Russia	11.1	14.2	12.3	20.2	13.6	-6.6	-32.5
6	South Africa	9.8	6.9	5.7	7.8	7.1	-0.6	-8.3
7	Egypt	12.8	21.6	6.4	6.8	2.7	-4.1	-60.7
8	Iran	7.3	2.5	2.5	1.5	2.5	1.0	63.4
9	Brazil	0.002	0.003	—	0.003	0.003	—	—
	Total BRICS	**510.1**	**520.4**	**483.3**	**581.9**	**658.1**	**76.2**	**13.1**
1	Somalia	255.0	264.9	289.2	358.5	262.9	-95.6	-26.7
2	Germany	138.6	138.8	116.8	224.9	247.6	22.7	10.1
3	USA	159.5	139.4	144.9	201.3	226.4	25.2	12.5
4	Netherlands	188.6	188.4	188.7	227.9	214.6	-13.3	-5.8
5	Belgium	67.0	64.9	81.5	129.7	135.0	5.3	4.1
6	Japan	98.8	120.7	93.8	105.9	132.5	26.6	25.1
7	South Korea	44.6	47.7	60.0	84.5	116.9	32.4	38.4
8	Israel	101.7	108.7	97.7	105.5	98.8	-6.7	-6.4
9	Djibouti	90.1	91.3	92.7	94.8	80.6	-14.2	-15.0
10	Italy	40.0	37.5	31.4	49.5	61.6	12.1	24.4
	Other countries	503.4	473.3	505.3	585.4	539.5	-45.9	-7.8
	Total non-BRICS	**1,687.3**	**1,675.6**	**1,702.0**	**2,168.0**	**2,116.5**	**-51.5**	**-2.4**
	Total	**2,197.4**	**2,196.0**	**2,185.3**	**2,749.9**	**2,774.6**	**24.7**	**0.9**

Source: ITC Trade Map

2.10.3.3. International cooperation

In 1994 the agreement establishing the Common Market for Eastern and Southern Africa (COMESA) came into force for Ethiopia. The member states of the agreement (currently 21 states: Burundi, Comoros, Democratic Republic of the Congo, Djibouti, Egypt, Eritrea, Eswatini, Ethiopia, Kenya, Libya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Somalia, Sudan, Tunisia, Uganda, Zambia, Zimbabwe) provide each other with tariff preferences on a reciprocal basis. In addition, COMESA member states adopted a phased program of monetary cooperation aimed at creating a monetary union.

Ethiopian trade agreements



State/association with which Ethiopia has entered into a preferential trade agreement	Effective date of the agreement
COMESA: Burundi, Comoros, Democratic Republic of Congo, Djibouti, Egypt, Eritrea, Eswatini, Ethiopia, Kenya, Libya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Somalia, Sudan, Tunisia, Uganda, Zambia, Zimbabwe	1994

2.10.3.4. Special economic zones

The Ethiopian government has identified industrialization as the primary means of transforming the economy. The Industrial Park Development Corporation is responsible for the development of large, medium and small industrial parks, and the Ministry of Agriculture controls the development of integrated agro-industrial parks.

The investment opportunity is open to national, local and foreign investors. The industrial parks that provide preferences in food production are Kilinto, Dire Dawa, Kombolcha, Mekelle, Adama, Bahir Dar, Jimma, etc.

Together with major international organizations such as UNIDO, FAO, UNDP, the Ethiopian government is piloting cluster-based agro-industrial development through integrated agro-industrial parks (IAPs). The creation of an IAP aims to coordinate and integrate disparate components of the value chain through clustering and creating links between farmers, processors and consumers. The sites selected for the pilot development are located in the Oromia, Gend Arba (Bulbula), South-West Amhara, Bure, Ethiopia Southern Nations, Nationalities and Peoples Region, Wainenata and Western Tigray regions.

IAPs will represent geographical clusters of companies united to share various infrastructure and capabilities for buying, selling, training, extension services and other types of mutual assistance. The Ethiopian government has indicated that the parks will bring together companies that export value-added agricultural products to the global market along with local companies, farmers and youth.

2.10.3.5. Institutes for supporting the export of agricultural products

Ethiopian Export Promotion Agency

Description	The Ethiopian Export Promotion Agency is a government agency. Its goal is to develop the export of national products, increase their competitiveness and promote them in foreign markets. It was founded in 1998. In 2016 the Agency's responsibilities were transferred to the Ministry of Trade and Regional Integration of Ethiopia. The agency is expected to resume its activities as an independent agency after the approval of Ethiopia's export development strategy
Main goals	• implementation of the country's export strategy; • providing technical support to exporting enterprises and training in export activities; • conducting research to improve the competitiveness of local products in foreign markets; • establishing connections between national producers and potential foreign partners; • providing support to exporters in carrying out exhibition activities; • collection, analysis and dissemination of information on international trade, consultation of exporting companies
Contact details	**Address:** Bole Road Addis Ababa, Addis Ababa **Tel.:** +251 150 4479 **Website:** https://www.ethiomarket.com/EEPA

03

BRICS countries best practices in agriculture

Contents

Expert opinion

Ms. Jannifer He

Global Sourcing Expert, Freshippo

Freshippo is a leading company in Chinese retail sector, representing itself as a «new retail format». In 2016 we launched an unexampled O2O model (Online-To-Offline): providing our customers with offline and online services at the same time. Consumers can visit our shop, choose whatever they like, buy it and get back home, or they can place an order through our app for us to deliver goods within 30 minutes. This is what we call the new O2O retail model. We were the first to launch it on the Chinese market.

Moreover, within the company we base our decisions on the big data system, even when choosing locations to open a new shop. Been identified the target audience through a special system we could select products from around the world based on their needs. Every offline shopping or placing an order in our app leaves certain consumers' information. For example, the kind of goods and categories the consumers are looking for. Then we have the capability to analyze this information in depth and based on sales data, trends, re-orders, we know exactly what product our purchasing team has to look for next time. This way, we use the big data system so that our company can choose the best products for our customers. This is also a fairly new occurrence in the Chinese retail industry.

Consumers in China are ready to innovate, they are always looking for something new, because China shows innovation-driven growth and we face it every day. Consumers have a lot of choices, they are just used to novelty.

3.1. Innovative practices

Brazil

Brazilian company Monsanto (since 2018 owned by Bayer Crop Science) is an example of the largest developer of GM crops with innovative Roundup Ready technology, the Climate FieldView™ digital tool and the Orbia digital platform[15]

Monsanto (since 2018 owned by Bayer AG) was formerly one of the world's largest producers of genetically modified seeds and chemical pesticides. It now sells GM seeds and other products under the Bayer Crop Science brand. Among the most successful innovative developments of the current Bayer Crop Science there are:

- **Roundup Ready Technology**: one of the key developments of the former Monsanto company was the Roundup Ready technology, which made it possible to produce seeds of crops of soybeans and corn resistant to treatment with the herbicide Glyphosate. This technology allows farmers to effectively control weeds without damaging beneficial plants. The company was also one of the pioneers in the development of genetically modified varieties of soybeans and corn. These varieties have been modified to have different properties such as resistance to herbicides, viruses and pests; they also provide higher yields. GM soybeans and corn have become widespread in Brazil and other countries due to their high yield properties and due to the opportunity for farmers to reduce pest control costs.

- **Climate FieldView™**: Bayer technology which is an intelligent platform connected to agricultural machines that collect data automatically. Rural producers can monitor all local activities in real time mode. The Climate FieldView system generates high-resolution maps and allows farmers to analyze the history of production and productivity in agricultural areas. This way, the farmer can implement better management practices and make more assertive decisions throughout the harvest.

[15] https://www.bayer.com/en/agriculture/nossa-senhora-aparecida

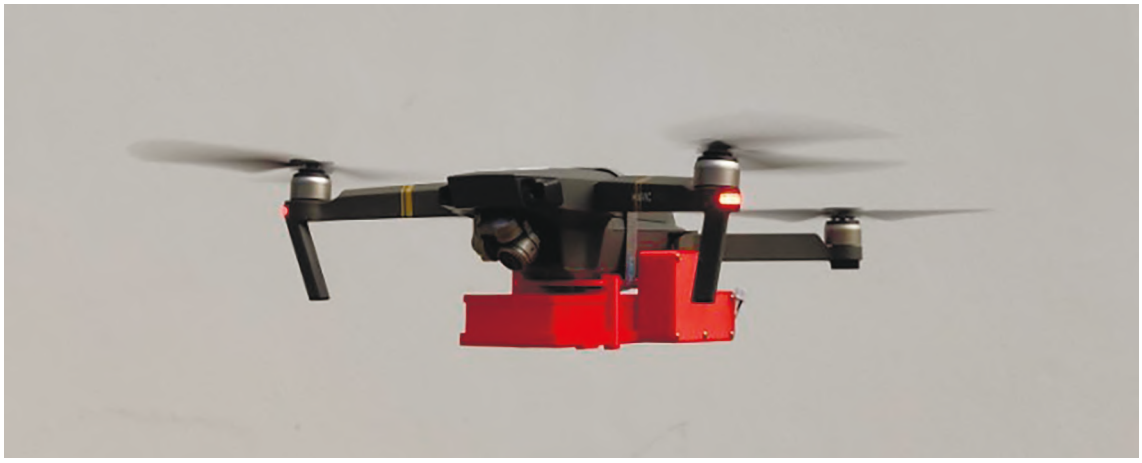
https://www.agro.bayer.com.br/pro-carbono

https://www.bayer.com.br/pt/paixao-por-inovar

- **Orbia**: a digital trading platform for agribusiness. The innovative platform has more than 100 distribution partners. Rural producers can buy what they need and sell goods at Orbia; they also have an opportunity to accumulate points that may be used for buying of different products and services. The platform was launched in October 2019 through a joint venture between Bayer and technology company Bravium.

Brazilian startup BirdView together with the IAEA has released and successfully tested special cargo drones to combat flying insects that carry dangerous infections[16]

The primary mission of these drones is to reduce the mass use of insecticides against flies and mosquitoes. The use of insecticides has an extremely negative effect on the environment in general as they also kill other insects useful for agriculture. The main idea of the project is that drones equipped with special cargo compartments spread sterile male mosquitoes and flies in the selected area during the flight, which are then unable to produce offspring. The technology has been tested in the Brazilian states of Pernambuco and Guarana. The participants of the trial are positive about its results. Thus drones have successfully released not only sterile male Aedes aegypti mosquitoes (this species carries dengue, yellow fever, zika and chikungunya), but also the infamous vectors of the sleeping sickness of tsetse flies. It is reported that even a drone can disperse 17,000 insects in 10 minutes. BirdView co-founder Ricardo Machado states that this allows to count on the delivery of almost 300 thousand insects per day. It is also claimed that this technology can allow for a 90 per cent reduction in the population of harmful insects within three to four weeks.



[16] https://clck.ru/3B3wCW

Innovative designs for oyster farms in Brazil[17]

Brazil is one of the Latin American leaders in the production of farmed oysters. The issue of optimizing processes and improving methods of growing oysters is an important aspect that specialists from the Brazilian agricultural Research Corporation Embrapa are working on. The corporation is engaged in the development of technologies, knowledge and preparation of scientific and technical information aimed at optimization of Brazilian agriculture, in particular, of aquaculture.

The main problem in growing oysters are the low tides. Farms are usually located near the shore and use special facilities, however during the low tide oysters lie in the sun. This damages their internal structure and spoils the product quality. Brazilian specialists from the technology development center have introduced a new kind of facilities that change their position depending on tide. With the introduction of new design of facilities, oysters remain at the required depth (20 cm) and do not lose access to microalgae, their main source of nutrition. According to the researchers, in the region the percentage of commercial oysters (i.e. more than 60 mm) at the end of a 10-month cycle averages 54% when using traditional farms and 89% when using new types of farms.

An additional benefit of these facilities is their simple design, which allows for mass integration into oyster aquafarms to meet demand in oyster farms across the country.

[17] https://clck.ru/3AvxtQ

Brazilian Agricultural Research Corporation (Embrapa) has developed an innovative PPS (Precocity, Productivity and Sustainability) system focused on intensive cattle production[18]

The Precocity, Productivity and Sustainability System (PPS System) is an integrated system that combines crop-livestock integration (ICL) and livestock-forestry integration (ILF) strategies in a pasture-based Nelore cattle rotation system for breeding, rearing and finishing, according to animal category, in order to achieve better results in terms of weight gain, growth, reproductive performance and health. The PPS System provides recommendations for rotating animals on the farm throughout the year, with the aim of obtaining the advantages of ICL, such as higher weight gain when this characteristic is desired, and of systems with trees, such as better health, sexual precocity, and lower heat stress at specific times. The system also includes recommendations for sanitary management. This production system is based on the results of more than 15 years of research by Embrapa Agrossilvopastoral on integrated crop-livestock production systems and other scientific works. It is recommended for breeding, rearing, and finishing farms with Nelore animals in Central Brazil and the Northern Region.

[18] https://clck.ru/3Avzjm

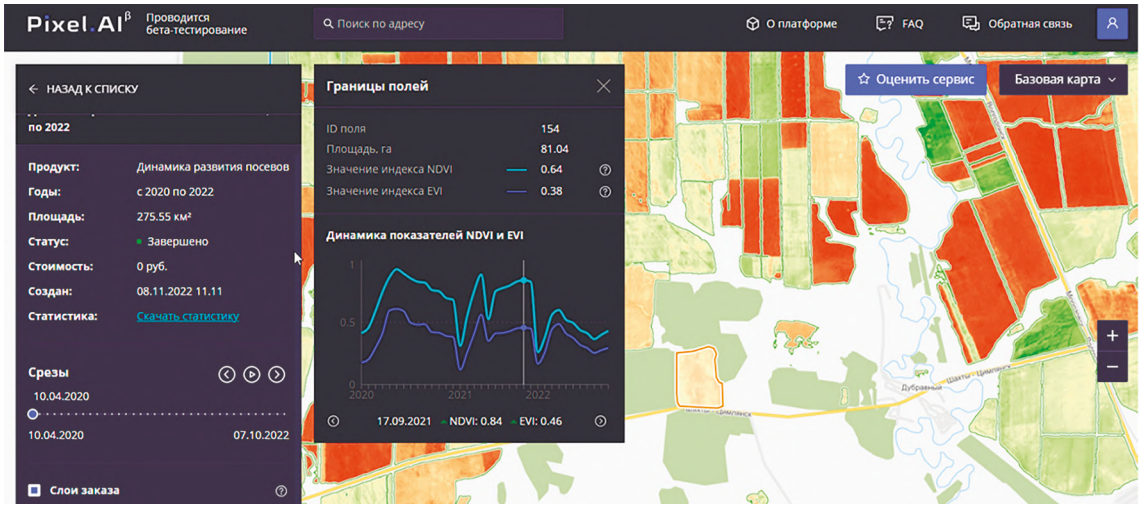
Russia

Monitoring of agricultural land development using artificial intelligence[19]

Pixel.AI is a multifunctional platform based on artificial intelligence (AI). One of its innovative solutions is the "Dynamics of crop development". The platform was developed in 2022 by Terra Tech JSC which is part of the Russian Space Systems Holding. AI independently selects and interprets satellite images over a certain period. The platform provides an opportunity for users to monitor the dynamics of the crops development in each selected field using an interactive diagram. For this, one needs to complete three steps: select an area of interest, a time range, and send a request for completion. A smart algorithm automatically selects remote sensing data of the Earth, determines the boundaries of fields, categories of their use and generates a ready-made report for download.

The information obtained after automatic processing of satellite images is necessary for the choice and accounting of agricultural land, commissioning of land, evaluation of land plots, control over the use of territories, and for making decisions on lending, subsidizing and insurance of enterprises and monitoring of collateral lands. Thus, the platform Pixel.AI meets the information needs of both farmers, small agricultural companies and large businesses, including agricultural holdings, banks and insurance companies dealing with agricultural assets.

In a few months of the platform activity more than 5,000 users have placed their orders. The total area of the analyzed agricultural land exceeds 760 thousand hectares, and the geography of orders covers not only traditional agricultural regions but also the areas with increased risk to agriculture.



[19] https://pixel-ai.terratech.ru/#rec460953693

https://files.data-economy.ru/Docs/Effektivnye_otechestvennye_praktiki_na_baze_tekhnologij_iskusstvennogo.pdf

Weather recommendation system from "Notos" LLC[20]

Startup LLC "Notos" has developed a high-tech software and hardware complex погодавполе.рф. A cloud-based service consisting of a network of weather stations with remote access and an agroanalytics module with artificial intelligence (AI) technologies for forecasts and recommendations, operating on a subscription model. Scenarios of use: taking into account the amount of precipitation in remote areas to adjust fertiliser application rates and plan the timing of field work; selecting the optimal sowing density based on the productive moisture reserve to reduce seed costs and increase yields; predicting the onset of the plant development phase to select drugs growth regulating or stimulating. Currently the service is used by agricultural holdings, big and medium-size farms, and by small farms and sole proprietors in more than 15 regions of the Russian Federation.

The use of robotic machinery based on artificial intelligence[21]

The Cognitive Pilot domestic company has developed an independent control system based on artificial intelligence for combines, tractors and sprayers.
The Cognitive Agro Pilot system analyzes images from the video camera and uses deep learning neural network to determine the types and positions of objects in the process of movement. The system also builds routes for the machinery and transmits the necessary commands for maneuvers. Human error can occur in labor-intensive agricultural operations, making AI a universal solution to avoid associated cost overruns.

During the 2020-2021 agricultural seasons the system was installed on combines in more than 30 regions of Russia. Grain harvesters equipped with Cognitive Agro Pilot processed over 200 thousand hectares of land and harvested over 1 million tons of crops. More than 1,000 "smart" combines are already operating in Russia. Moreover, since the spring of 2023 Cognitive Agro Pilot AI autopilots have been industrially used on tractors from Pskov to Blagoveshchensk. The Cognitive Agro Pilot system is also available in Latin America, the Middle East, Africa and the CIS countries.

[20] https://погодавполе.рф/;
https://files.data-economy.ru/Docs/Effektivnye_otechestvennye_praktiki_na_baze_tekhnologij_iskusstvennogo.pdf

[21] https://cognitivepilot.com/products/cognitive-agro-pilot/

Intelligent fish farming management system[22]

Inforica has developed Fishweb, an intelligent software system for fish farm management. The main aim of the system is to ensure reliable accounting, storage and analysis of parameters (biomass, weight, feeding, etc.) of fish farming to provide expert assessment of the farm and support management decision-making.
Work in the system is carried out via a secure multi-user mode, which provides simultaneous work of several users with differentiation by available functions and level of information access. The use of FishWeb allows to ensure control, reduce labor intensity and increase efficiency and production performance of a fish farming enterprise.

[22] https://inforika.ru/services/

India

Indian agritech company Cropin launches Aksara, a generative artificial intelligence system for agriculture that takes into account climate conditions[23]

The first version of the Aksara system will cover nine crops (rice, wheat, corn, sorghum, barley, cotton, sugarcane, soybeans and millet) for 5 countries of the Indian subcontinent. This artificial intelligence system can tell farmers which resources to use for growing crops like rice or corn in specific agro-climatic conditions or provide recommendations on farming taking into account climate conditions; this is the company statement. Aksara is an open source model for sustainable agriculture, developed on the Mistral base model. A model designed to solve problems faced by farmers in India due to lack of information or other barriers.

Indian startup Brainwired has developed a highly effective gadget to help track the livestock health[24]

Brainwired is an agrotechnical startup from India, founded in 2018, which has developed the WeSTOCK livestock monitoring and tracking system. A portable IoT device is attached to an animal: it helps to identify sick and pregnant animals and timely notifies farmers about the need to call a veterinarian. WeSTOCK monitors the day-to-day activity of particular livestock and alerts farmers in case of any emergency. The whole system is highly customizable giving farmers the ability to choose from features allowing affordability and still ensuring quality. The in-house developed technology was created to support farmers and livestock farming in the country.

[23] https://clck.ru/3Aw4Bn

[24] https://www.brainwired.in/WeSTOCK

China

"Smart technologies" contribute to the development of China's agriculture[25]

Over the past decade, China has been actively using different innovative digital technologies such as big data, 5G, which make the entire production process easier and more efficient.

Shouguang County of Weifang City in Shandong Province is one of China's pioneers in the implementation of smart technologies in agriculture. There is a greenhouse production of peppers and tomatoes in the village of Tsuilingxi in Shouguan City District on the area of 100 hectares. Every year about 20 thousand tons of vegetables are exported to Russia from over there. It is home to several farms run by one large co-operative that popularises smart farming equipment among local farmers. All local greenhouses have automatic sprayers, intelligent lighting and ventilation systems. All the greenhouse equipment may be controlled by a smartphone, this significantly reduces labor costs. The method of growing plants using a soilless method with remote supply of nutrient solutions is also actively used here, which guarantees the quality and volume of the harvest. With the support of local authorities in Shouguan there operates a demonstration facility of modern agricultural technologies. There are more than 200 greenhouses on the territory of this base, including the most advanced with climate control systems that can reduce energy consumption by half. The base is also home to multifunctional robots for agriculture. Soil-free vegetable growing technology is applied in greenhouses on the area of 88 thousand square meters. Up to 15 tons of tomatoes are harvested here per day. Thanks to the use of a special cloud platform, farmers are able to precisely control all the smart equipment in the greenhouses, automate the processes of heating, cooling, additional lighting and shading.

Shouguang cooperates with the Chinese Academy of Agricultural Sciences and other research institutes to further reduce seed purchase costs, improve the quality of agricultural products and enhance their disease resistance. It is worth mentioning that Shouguang has hosted 12 leading national platforms, including the Vegetable Research and Breeding Center of the Chinese Academy of Agricultural Sciences. This has contributed to the development of 205 local vegetable varieties, making Shouguang the country's largest seed production base and a national center for the selection of high-quality varieties. Thanks to the development of vegetable growing, the economy of Shouguan demonstrates significant results. By 2023 the total volume of deposits in financial institutions of Shouguan has reached 175 billion yuan and the incomes of urban and rural population are steadily growing.

[25] https://russian.cgtn.com/news/2024-03-10/1766681840831348738/index.html;
https://russian.cgtn.com/news/2023-02-17/1626581570274140161/index.html

"Smart aquafarms" help revitalize rural areas of China[26]

A smart aquatic farm is successfully operating in the city of Chongqing. Fish and vegetables are grown at this farm simultaneously. This new high-tech way of farming is called aquaponics. The smart aquafarm is a two-storey structure, occupying only 8 thousand m^2, it annually produces 40 tons of vegetables and 150 tons of sea bass. On the ground floor there is an aquaculture area with 24 ponds, equipped with automated devices and sensors that provide round-the-clock smart digital operation of the ecosystem. All the feeding is done automatically using artificial intelligence.

The ultra-modern and high-tech water recycling system is another pride of the aquafarm. After cleaning and disinfection, some of the wastewater from the ponds returns to the reservoirs, while the other part is sent to the vegetable growing area on the upper floor. The system also works in the opposite direction: water returns from the plants to the ponds on the ground floor. Such a system saves about 80-90% more water compared to traditional agricultural methods and is an excellent example of sustainable agricultural production.

Chinese "Taobao Villages" as an example of successful rural development[27]

The rapid expansion of cross-border e-commerce has opened up opportunities for small and medium-size enterprises to participate in global trade. Moreover, e-commerce platforms may become a tool for bridging the gap in rural and urban development of China. "Taobao Villages" is one of these tools. "Taobao Villages" are rural Chinese villages where the local developnig economy is largely focused on e-commerce via the Taobao online platform. At least 10% of households in such areas are actively involved in e-commerce, with annual online sales of at least 10 million yuan. An notable feature of these villages is clustering. New villages tend to appear next to existing ones. Clustering mainly takes place in areas with a well-developed industry and the infrastructure necessary for e-commerce. This infrastructure is often provided by the government, which is very interested to return young professionals to rural areas, so some local authorities are creating special incubation parks for e-commerce.

[26] https://russian.cgtn.com/news/2024-03-20/1770328942166872066/index.html

[27] https://ekd.me/2022/03/derevni-taobao-v-kitae-kak-prodavcy-uzhivayutsya-s-industriej-lajvstrima/; https://raspp.ru/business_news/top-chinese-technology/

South Africa

The Khula app! application is an innovative digital solution for South African agriculture[28]

Khula! App is a mobile application developed in the Republic of South Africa for improving access to information and markets for small agricultural producers. It provides a platform where farmers can register, add information about their products and interact with potential buyers. This mobile application was designed to stimulate direct sales from the farms avoiding intermediary and to provide fresh produce to the market. Khula! App works on the principle of an agricultural exchange, where farmers may put their products up for sale, and buyers, including restaurants, hotels, grocery stores and private buyers, may buy these products directly.

Key features of Khula! App:

- **direct sales.** Farmers may sell their goods directly to customers, this allows them to increase income and reduce the number of middlemen;
- **tracking orders.** The application provides functionality for tracking the delivery of products from the farmer to the buyer, ensuring transparency and reliability of the process;
- **products quality and freshness.** Customers have the opportunity to purchase products directly from the farm, this ensures their freshness and high quality;
- **support for local farmers.** Buying goods via Khula! App, customers support the development of national agriculture and participate in improving of their region economy;
- **market information.** The app provides farmers with access to up-to-date market information, including demand for certain products, prices and quality requirements. This helps them make informed decisions about what to grow and how to maximize their profitability.

[28] https://www.khula.co.za/

Equity investment in cattle[29]

The South African company Livestock Wealth has developed a unique concept for investing in agriculture. Instead of buying traditional stocks or bonds people can purchase a stake in a live cow via a mobile app. Livestock Wealth was founded in 2015 with the support of the investment company Mine Workers Investment in order to create a unique global platform for a new investment format. Since its foundation, the company has been promoting direct investments in South Africa agriculture and provides an opportunity for anyone who wants to feel like a farmer. The company and the same name application Livestock Wealth is a crowd farm where anyone can invest in livestock. The application concept is simple: investors buy a share of a cow, and then profit from the sale of its milk or meat. In a short time the company attracted more than 2 thousand investors. Some of them own whole cows, while others own only a small part. For example, one cow may have 20 owners; each of them owns a share of the animal.

Currently, the Livestock Wealth app is available for investment from anywhere in the world. Prices for shares in cows start at 40 US dollars per share of a calf, and the price of a complete pregnant cow may exceed 1,300 US dollars. The application promises investors significant profits. According to the company, investors can expect returns of up to 14% within 12 months. This makes such investments very attractive, especially for those who are looking for short-term investments with high returns. The Livestock Wealth platform also attracts more young people to the agricultural sector. Young people are actively turning to technology to find new ways to invest, and the Livestock Wealth app provides them with this opportunity. Thus, the Livestock Wealth app is an innovative and successful project that attracts investors from all over the world. Via this platform people can invest in agriculture, profit from the sale of milk and meat, and contribute to the development of South Africa agriculture.

[29] https://livestockwealth.com/about-us/

Drones for optimization of agricultural resources usage[30]

South African startup Aerobotics has become a breakthrough in the agricultural technology sector. The Cape Town-based company provides producers with farm-level analytical data using satellite and drone imagery. This development helps farmers identify constraints and ways to increase production. Drones and satellite technologies help to identify problem areas or estimate the general condition of the farm. Aerobotics will analyze aerial surveys of fields, based on the images received from drones, determine the problems of a particular farm. The farmer just needs to purchase the necessary equipment while the company's specialists will carry out flights, collect and analyze data. According to Mr. Paterson, the company developer and co-founder, this will help to understand the degree of infection of fruit crops or the lack of watering. The analysis results will appear in a special mobile application of the company — Aeroview. Currently, this application is used in 11 countries, including the USA, Russia and the UK. The startup has justified its investments and continues to attract new investments. To date the company assists more than 350 farming groups that annually cultivate 600 thousand acres in Africa and the United States.

[30] https://agfundernews.com/aerobotics-james-paterson-on-centering-the-farm-in-farmtech

Egypt

1.5 Million Feddan Project

In 2017 in order to implement the national strategy Vision 2030 for agricultural development and improving food security in Egypt, the government launched the 1.5 Million Feddan Project. The project, controlled by the state-owned Egyptian Countryside Development Company, is being implemented in several regions, namely in the districts of Farafra, El Magr and El Minya. Its objective is revival of Egyptian agriculture, at digitalization and industrialization of the country's agriculture and at expansion of the agricultural land area by almost 20% via creation of a new rural area on reclaimed land. For example, as part of the project, an extensive network of water wells 800 metres deep will be dug in Farafra, a region known for the chalk rock formations of the White Desert. Pumping plants and oxidizing pools have been developed to extract water and remove minerals to make the desert soils of the area very fertile. Another big plot of land is allocated for agriculture in the area of El Minya, south of Cairo. In addition to accelerating the reclamation process, the project provides for increasing the production of consumer goods, and for promotion of sustainable rural communities creation with improved housing conditions and health and education services. The project also promotes introduction of different farming methods including the use of solar panels for electricity generation and of advanced technologies for identification of areas where strategically important crops may be grown.

The 1.5 million Feddan project includes several initiatives aimed at increasing food production and improving living conditions in rural areas. In particular the 100,000 Greenhouses Project, which aims to reduce the amount of water used in growing crops and increase the efficiency of agricultural production. Growing crops in greenhouses will reduce water consumption by 70% compared to traditional farming methods. According to the project, it is planned to build more than 42 thousand hectares of high-tech greenhouses with double ventilation and screening systems. The products grown in greenhouses are expected to be exported to the Middle East and Europe. Greenhouses will be divided into two types depending on their technology: mid-tech greenhouses using a mixed growing system, and net greenhouses used for growing in spring and summer. All greenhouses are made of plastic and are designed to reduce the indoor temperature in order to adapt to the desert climate at the location. Net type greenhouses are for growing products for export to European countries in winter and to the Middle East in summer. The implementation of this initiative will enable Egypt to supply products to different markets at different times of the year. This project is considered one of the largest agricultural greenhouse projects in the world.

Opening of the first phase of the initiative "100,000 greenhouses", 2018

Sustainable Agriculture Investments and Livelihoods Project (SAIL)[31]

The Sustainable Agriculture Investments and Livestock Project (SAIL) is another key initiative of the Egyptian government. Its goal is to increase resilience to the impacts of climate change, such as water scarcity and salinity and rising air temperatures. The project was launched in 2016 with the support of the United Nations International Fund for Agricultural Development and covers an area of more than 900 feddans (934 acres). Due to the project, crops are now growing in large areas of the former desert.

The main objective of the project is to timely inform small and medium–size farms via an early warning system. The initiative provides an integrated early warning climate system that sends text messages to farmers basing on the data collected from five meteorological stations. To ensure the forecast accuracy data verification is done using both global and regional models and taking into account both long-term and short-term weather and climate trends.

[31] https://www.ifad.org/en/web/operations/-/projet/1100001745

Egyptian agritech startups

Egypt is the second largest startup market on the African continent after Nigeria, in 2021 the country attracted venture capital of 446 million US dollars, 2% of these funds were used to develop startups for agriculture.

El Shuna app

Egyptian small and medium-size farmers often face financial, logistic and infrastructure difficulties selling their products. In particular, there is an acute problem of the high cost of warehousing of agricultural goods. For example, pulses warehousing after the harvest is quite expensive for one farmer, and he is forced to sell the crop directly to a trader at lower prices. The El Shuna application was developed to solve this problem. It helps small farmers find a place in a regional warehouse for wholesale storage and processing, from over there the goods are later sold to distributors and Egyptian exporters. Thus, farmers have the opportunity to store their goods in a warehouse and sell them later with a minimal drop in price.

VAIS app[32]

Visual and AI Solutions (VAIS) is a high-tech company founded in 2020, which is currently one of the leaders in precision agriculture and geospatial intelligence in Africa and the Middle East. Based on the AI the VAIS FarmGuru application offers farmers 3 types of modules: a field intelligence module offering diagnostics of pests and diseases using artificial intelligence; a crop analytics module providing important information about crops; an irrigation analytics module offering recommendations on irrigation of the field. The app uses satellite imagery and uses AI to identify insect infestations, diseases and plant reactions to weather conditions before the farmer can detect them, providing time for early intervention.

[32] https://vais.ai/

Tomatiki

Tomatiki company develops and offers farm operation solutions based on the Internet of Things (IoT) concept. Global weather and climate changes impact farms directly and the devices developed by the company notify farmers by text messages or phone calls about the weather forecast for the near future. Built-in sensors and devices in greenhouses help to remotely monitor the temperature in the greenhouses. A digital timer and irrigation functions enable one to remotely control irrigation operations and to operate the entire farm in general.

[33] Reference: The Internet of Things (IoT) is a network of physical objects equipped with built-in sensors and technologies for interaction with each other or with the external environment via wired and wireless networks. This allows digital monitoring and control of the physical world. It is assumed that organization of such networks is capable of restructuring economic and social processes and eliminating the need for human participation in part of operations. For example, a voice assistant in a 'smart home' system, a 'smart watch' with a built-in fitness tracker, etc.: https://clck.ru/3B3wmi

Saudi Arabia

Innovative seawater greenhouses[34]

Saudi Arabia has unhindered access to fresh water. In terms of water consumption per capita, Saudi Arabia occupies a leading position in the region and in the world. However, the state does not have sufficient fresh water reserves due to the difficult climate. Although Saudi Arabia is engaged in desalination of seawater, the issue of using non-desalinated seawater in agriculture is a relatively recent issue. The startup Red Sea Farms presented its innovative irrigation technology, which includes using seawater for greenhouses instead of fresh water; it's a breakthrough technology of the kingdom. The technological principle is quite simple: salt water evaporates, and the water vapor is used for growing crops. Currently, the company specializes in growing vegetables in greenhouses and new technology allows to save up to 300 liters of water at growing of 1 kg of products. The most famous product grown using seawater is cherry tomatoes. Moreover, such vegetables have thicker and crisper skins; this expands the product shelf life and radically increases the amount of antioxidants and vitamins. Salt water triggers natural changes in plant structure, which increases productivity by 50-65% than using fresh water.

[34] https://innovation.kaust.edu.sa/kaust-rpdc-kacst-launch-greenhouse-for-red-sea-farms/;
https://rshbdigital.ru/articles/saudovskaya-kompaniya-vyrashchivaet-ovoshchi-v-pustyne-s-solenoy-vodoy

Vertical farms in Saudi Arabia[35]

Vertical farming is becoming increasingly popular in the Middle East, where climate conditions make it difficult to grow crops using traditional farming. But the active use of vertical farming can change the situation and allow the country to increase food production significantly. The Ministry of Environment, Water Resources and Agriculture of the Kingdom of Saudi Arabia has already invested millions in vertical farming, as it seeks innovative solutions to ensure future food production. Since water scarcity continues to be a major problem in the arid region, groundless indoor farming may transform the country's food industry and bring significant environmental benefits. One of the pioneers in the field of integrating vertical farms in the KSA was the Russian technology startup iFarm whose methods are widely used in many countries around the world. Currently, KSA has two farms of that kind with cultivation area of 1,250 and 1,087 m^2, where various types of greens and salads are grown. The total volume of grown products is 23 and 16 tons of greens per month.

[35] https://ifarm.fi/greens_vertical_farm_saudi_arabia;
https://spacefarm.ae/ksa2556.html

UAE

The world's first technopark city Food Tech Valley Dubai[36]

Food Tech Valley Dubai — the world's first technopark city. Its activities are aimed at building an independent food and agricultural ecosystem. It's located in the Al-Warsan district, the technopark area is 18 million square feet. Food Tech Valley includes a production site (6.2 million square feet), a logistics area (1.5 million square feet), an innovation, research and development center and a business park. The UAE Government is implementing the project, its strategic partner is the Ministry of Climate Change and Environment of the UAE and the development company Wasl Asset Management Group technopark carries out development and management. The Food Tech Valley Dubai production site includes vertical farms and aerial farms, hydroponic systems, algae cultivation facilities and fish farms. The Food Tech Valley Dubai production site is expected to enable the cultivation of more than 300 different types of crops. The logistics zone of the technopark includes enterprises for maintaining the supply chain, processing and packaging of agricultural products. The Food Tech Valley Dubai Innovation Center includes a business incubator to support high-tech agro-industrial projects and an educational center. In addition, there is a trading platform on the basis of the technopark, where national agricultural products and food products are presented. The trading platform is managed by an e-commerce service in the B2B Trading segment.

Vertical farming

Badia Farms became the first vertical farm launched in the UAE. The company manages a production facility with an area of 8.5 thousand square feet. The company specializes in growing of fruits and vegetables, including broccoli, radishes, coriander, arugula, sorrel, basil and other products. The main clients of Badia Farms are enterprises of the HoReCa sector in the UAE. The technologies employed in the project make it possible to reduce water consumption by 90% compared to soil cultivation[37].

In July, 2022 the companies Crop One Holdings and Emirates Flight Catering announced the opening of Emirates Crop One, a 330,000 square feet vertical farm. This project enables companies to produce up to a thousand tons of leafy greens per year. The volume of investments in the project exceeded 40 million US dollars. The goods produced at the farm are sold at retail outlets under the Bustanica brand; Emirates Flight Catering also uses them for its own needs[38].

[36] https://www.foodtechvalley.ae/

[37] https://www.badiafarms.com/

[38] https://techcrunch.com/2022/07/19/crop-one-emirate-worlds-largest-vertical-farm-in-dubai/

In December, 2023 the Emirati ReFarm holding, whose activities are aimed at ensuring the country's food security and sustainable development, signed an agreement with the FoodTech Valley Technology Park on the construction of a GigaFarm closed-loop vertical farm. The project will be implemented jointly with the company Intelligent Growth Solutions, which provides infrastructure for vertical farming. It is planned to build 5 farm facilities, the total area will be 900 thousand square feet. The crop production facility will be integrated with recycling technologies to allow irrigation without the need for additional water resources. It is planned that when the enterprise reaches full capacity it will recycle up to 50 thousand tonnes of waste and the zero-waste ratio will be from 20 to 25%. Minimization of carbon use is also ensured via the use of solar energy. GigaFarm will enable cultivation of up to 200 types of crops, this makes it possible to replace up to 1% of UAE fresh products import[39].

[39] https://clck.ru/3B3yVe

Hydroponic farming[40]

Emirates Hydroponics Farms is one of the first companies to launch soil-free farming. Emirates Hydroponics Farms started its activity in 2005 under the name City Farm LLC, having received a patent for a greenhouse with an area of 1 thousand m^2. The greenhouse is 9 m high and is equipped with computerised climate and humidity control systems to monitor and regulate the temperature in the greenhouse around the clock. In addition, the company uses the technology of codominant planting; this enables to grow herbs, fruits and vegetables together. Besides the effective use of the production site, this technology acts as a natural insect repellent, enabling to minimize the amount of pesticides. At present time the company owns a farming facility of 20 thousand m^2 and produces fruits and vegetables including lettuce, tomatoes and peppers.

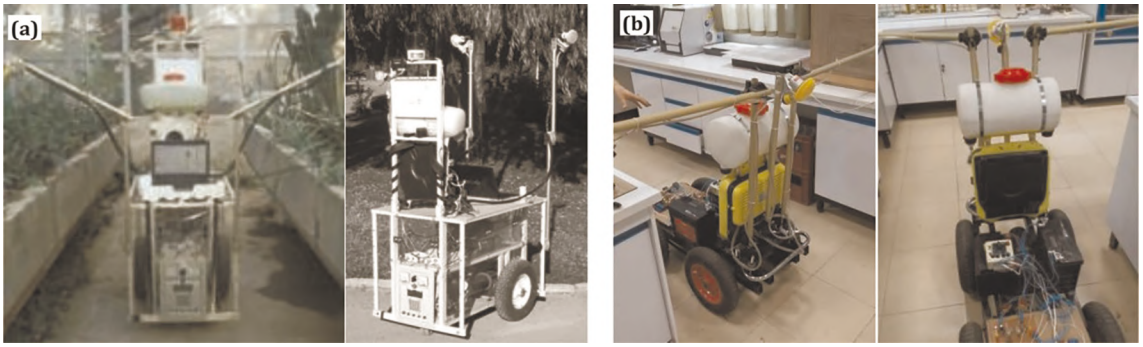
The Pure Food Technology project is also one of the leaders of the UAE hydroponic technology market. The company has developed a prototype of a vertical hydroponic farm that includes robotic technologies and uses solar energy. Artificial intelligence controls the farm production processes. The company has 11 patents for innovative solutions in food production and expects to get 5 more in the field of sustainable agriculture, robotics and hydroponic vertical farming. All the company's patents are registered in the UAE; the prototype was also developed in Dubai. The company aims to replace imports of agricultural food products worth 7.7 billion US dollars and to achieve self-sufficiency in the production of plant-based food products.

[40] https://emiratesfarms.com/;
https://clck.ru/3AwAtQ

Iran

Application of robotics in Iran's agriculture[41]

Currently Iran is actively exploring and implementing IT technologies for agriculture, especially agricultural robots in greenhouses and fields. Researchers have designed and constructed a three-wheeled vehicle with differential control, it is used as a greenhouse sprayer (**Fig. a**). The robot uses ultrasonic sensors to navigate aisles, analyze obstacles and apply spray systems. The accuracy of the spray function according to test results was 99.47%. Iranian designers also created another four-wheel greenhouse robot with differential control (**Fig. b**). The robot's navigation was evaluated at different levels and in real greenhouses. The robot's navigation algorithm is based on studying the movement trajectory, so that the route is stored in the robot's memory with the help of remote control based on pulses transmitted from the wheel encoders, then the robot passes the route automatically.



Another team of Iranian scientists has developed a prototype robot for precision planting of seeds in trays. A prototype seeder was designed with the help of the SolidWorks software, later it was tested for planting of tomato seeds. The seeder consists of several parts. The test results proved that the design capacity of the sowing robot is 17-35 thousand seeds per hour. Average precision of the developed system is 88%; design productivity of the system for sowing seeds is 170 trays per hour.

Iranian farmers also often use agricultural drones for spraying land and for foliar fertilization. The Iranian Ministry of Agriculture actively supports the use of drones in agriculture.

[41] https://www.intechopen.com/chapters/84210

Construction of urban farms in Iran contributes to the growth of agricultural production[42]

One of the innovative trends in Iranian agriculture is the construction of urban farms that can increase agricultural production not only in rural areas but also in cities. Such an example was the Opla urban farm, built with the support of the Municipality of Mashhad and sustainable agriculture consultants from Netherlands, with a total area of 1 hectare. The farm has a capacity for 400 participants, each renting 25 square metres of urban land to grow their own basket of healthy vegetables. Opla centrally organises its members' access to biofertilisers and pesticides to ensure the cultivation of safe food. In addition to this farm, Opla has supported the city of Mashhad to set up 40 organic waste collection points to produce compost. Some of this compost is utilised on the farm.

The Iranian satellite Khayyam presents a set of 80 innovative applications covering the environment, agriculture and urban planning[43]

On June 8, 2022 the Iranian Khayyam satellite was launched from the Baikonur spaceport in Kazakhstan, over the next 5 years it should collect critical data and images that will in future make an important contribution to the development of agriculture, mining, monitoring and control of water resources, and contribute to the forecasting of natural disasters. Thanks to a recent development at the Iranian Space Research Institute, satellite images are ready for competitive commercialisation and market expansion. They are now available on the institute's website. Khayyam application functions range from environmental monitoring, precision agriculture, urban studies and mineral exploration to water surveillance and disaster management. In agriculture, Khayyam can be useful for optimising water consumption, tracking changes in land use, as well as detecting diseases, assessing soil health and analysing planting dates. In terms of disaster monitoring Khayyam contributes to risk modelling, damage assessment, infrastructure monitoring and early warning systems.

[42] https://magazines.rijksoverheid.nl/lnv/agrospecials/2023/01/iran

[43] https://clck.ru/3AwEmu

Below are some of the applications of Khayyam satellite data in agriculture:

- monitoring trends of pollutants movement in water, air and soil;
- assessment of land degradation and desertification, monitoring of soil erosion rates and the condition of deserts and drylands;
- optimization of water consumption management at farms;
- optimization of harvest stages;
- regulation of the amount of waste at production;
- monitoring of the timing of agricultural crops sowing;
- identification and research of plant diseases;
- yield assessment before harvesting;
- determination of the type and amount of fertilizers needed;
- determination of soil types in different regions;
- monitoring of plant growth modification, etc.

Ethiopia

Hydroponic plant growing system[44]

Ethiopia has launched a hydroponic vegetable growing program to combat malnutrition and provide access to more nutritious food. Hydroponic farming is the practice of growing crops without soil using a variety of materials to support the plants' roots. Hydroponic farming is a significant space saver and does not require rain or irrigation. Thus, plants can grow regardless of the weather and time of year.

The program is being implemented in central and southern Tigray, regions especially prone to drought. More than 50 households have been trained in hydroponic farming methods as part of the program.

Integrated agro–industrial parks[45]

The Government of Ethiopia together with UNIDO (United Nations Industrial Development Organization) has established integrated agro-industrial parks (IAIPs) in the country. These parks are modern agro-clusters that provides favorable conditions for companies engaged in the production and processing of agricultural products, agroengineering and related fields. IAIPs are also special economic zones. The goals of the IAIPs are to increase agricultural production, ensure agriculture modernization, create jobs, attract private sector investment, increase export and reduce poverty in cities and rural areas.

Integrated agro-industrial parks were estblished in four regions of the country. The overall parks infrastructure includes access to electricity, water, communications, cold storage, processing plants, quarantine facilities, laboratories, sewage treatment plants, certification centers, etc. Ethiopia became the first African country to implement the IAIPs.

[44] https://www.hortidaily.com/article/9607140/ethiopia-tries-hydroponic-farming-to-improve-access-to-nutritious-food/

[45] https://downloads.unido.org/ot/51/11/51111360/Integrated-Agro-Industrial-Parks-in-Ethiopia-booklet.pdf
https://iaip.gov.et/ethiopia-iaip/;
https://www.unido.org/sites/default/files/files/2018-08/Integrated-Agro-Industrial-Parks-in-Ethiopia-Overview-document.pdf

Expert opinion

Darius Yakovchuk

Representative in South Africa, Group AFROINVEST

South Africa is one of the first BRICS member countries and plays a crucial role on the African continent. South Africa not only produces and imports a variety of agricultural products itself, but is also a crucial hub for a large number of neighboring countries, virtually the entire southern part of the continent.

The BRICS countries have a high potential to increase mutual trade in agro-industrial products. But for this to happen, several key issues are to be addressed. First of all, it is logistics, which has become very expensive in the prevailing conditions. Currently, the cost of sunflower oil is comparable to the cost of the logistics component. As matters stand, it is economically favorable either to transport a lot or to supply only expensive items with high added value. How can the situation be adjusted? It is necessary to develop new logistics routes and new ships, it is necessary to set up our own merchant fleet. Everyone knows that it is no longer possible to rely on Western partners who are monopolists in the container shipping market.

Another important area that we are now actively working on is the establishment of our own warehousing facilities and our own distribution. What does the process look like? If a large consignment arrives, it is difficult to find buyers for it. They can only be large distributors who offer a low price, which is not at all favorable with expensive logistics. Therefore, the most effective way of realization is to sell from your own warehouse.

First of all, we are talking about small and medium wholesale. There are thousands of possible buyers in South Africa, including farmers, who are ready to take products in small batches, but constantly. And this kind of center can also be a reverse warehouse, where you can insert a packing line and directly collect, for example, pecans from farmers, pack them on site and sell them to Russia directly, without a dozen intermediaries.

Our group is just now launching and working on several such projects. First of all, this is a warehouse for raw materials in Durban, with an estimated capacity of 8,000-10,000 tones. Another project that is being launched is the construction of a grain terminal in Durban with the modernization of the port infrastructure, including the installation of energy facilities.

3.2. Investment cooperation

Brazil

In 2023 Brazilian meat giant Minerva Foods acquired the assets of Breeders and Packers Uruguay S.A. (BPU Meat) for 40 million US dollars[46]

In September 2023 one of the largest Brazilian agricultural holdings completed the acquisition of one of Latin America's most modern meat processing plants in Uruguay, owned by Breeders and Packers Uruguay S.A. (BPU Meat), a subsidiary of NH Foods. BPU with a total slaughtering capacity of 1,200 head per day, applies high technology in its operation, producing and exporting Uruguayan beef of the highest quality. According to Minerva Foods, the company has access to some of the most demanding and strategically important markets in the world, such as Japan, South Korea, China and the United States. The slaughter division currently supplies around 85% of its sales to foreign markets, particularly targeting high-income countries with demand for premium products. With this acquisition, Minerva Foods will now have a total slaughter capacity of 3,700 head per day at four slaughterhouses: Pul, Carrasco, Canelones, and now BPU.

In 2023 the Brazilian company Minerva Foods together with SALIC acquired a stake in Australian Lamb Company Pty Ltd.[47]

Australian Lamb Company Pty Ltd. has more than 30 years of market experience and is a leading supplier of premium lamb to domestic and foreign markets. The company's lamb and sheep slaughtering capacity is 3.8 million heads per year, which together with the capacity of Minerva Foods will amount to 4.8 million heads. The acquisition will allow Minerva Foods to take control of approximately 15% of the Australian market. Additionally, Australian Lamb Company has two processing facilities in the state of Victoria and is among the main Lamb and Sheep operators in the country, with about 93% of sales dedicated to export and accessing more than 70 international destinations, such as the United States (40% of export), Japan, South Korea and countries in Europe and the Middle East. This acquisition will allow the Brazilian company to increase its penetration in niche markets and expand its product portfolio with high value-added products, as well as increase its export potential in high-income markets.

[46] https://minervafoods.com/en/noticias/minerva-beef3-completes-acquisition-of-uruguayan-bpu-meat-for-40-million-usd/

[47] https://clck.ru/3AwGZk

JBS company initiates construction of the world's largest cultivated beef protein plant in Spain[48]

In 2023 JBS began construction of the world's largest cultivated beef protein plant in San Sebastian, Spain. The first commercial scale industrial plant of BioTech Foods is expected to be completed in mid-2024. The total investment amounted to 41 million US dollars. JBS is the majority shareholder of the Spanish company, which is the European leader in the cultured protein with a 53% market share. The investment is a milestone in the industry, since the plant when completed will be able to produce over a thousand tons of cultivated protein a year, with an expansion capacity of 4,000 tons a year in the medium term, a development that will contribute to further diversify the product portfolio of JBS. The new plant will be built on a 20,000 square meter plot of land, which will enable the facilities to expand and adapt to the needs of a market in constant evolution. BioTech Foods is planning to gradually increase its production capacity to address growing consumer demand. The company has already identified key markets like Australia, Brazil, the European Union, Japan, Singapore and the United States.

In 2007 Brazilian company Metalfrio Solutions acquired assets owned by Caravell and Derby (a freezing equipment concern) located in the Kaliningrad region as part of its strategy to expand its international presence[49]

In 2007 the Brazilian company Metalfrio Solutions S.A. acquired production facilities in the Kaliningrad region and opened there refrigeration and freezing equipment plant, Metalfrio Solutions LLC. This acquisition made the company a major player in the global refrigeration equipment market. Full-scale production of freezer chests and horizontal coolers started in Kaliningrad the same year under the brands of Derby and Caravell. The company cooperates with the largest ice cream producers such as: Unilever, Nestle, Iceberry, Russian Kholod, SibKholod and many others. It is also important to note that it is the plant in the Russian Federation that has become one of the 4 largest production sites of this company in the world, providing access to quality equipment not only to russian companies, but also to neighbouring countries.

[48] https://mediaroom.jbs.com.br/noticia/jbs-company-initiates-construction-of-the-worlds-largest-cultivated-beef-protein-plant

[49] https://metalfrio.com.ru/

Russia

International transport corridor North–South[50]

The intergovernmental agreement on the North-South multimodal transport corridor was signed by Russia, India and Iran in 2000. Later the number of participants increased to 14. The main goal of the project is to increase transit cargo flow from India, Iran and the Persian Gulf countries via Russia to Europe. Compared to the Suez Canal sea routel the distance approximately twice shorter. This fact reduces the time and cost of transportation. The project now links several different transport systems of individual countries. The International North-South Transport Corridor is an important traffic route developed to improve economic relationships between India, Russia, Iran and other countries, extending to Northern Europe. The Corridor is about 7,200 kilometres long and covers various modes of transport, including railway, truck and sea transport. Cargo traffic along all three branches is expected to double to at least 30 million tonnes by 2025 and 35 million tonnes by 2030.

Russia's participation in the North-South Transport Corridor is primarily aimed at increasing trade with South Asia and the Middle East, which will significantly reduce the time needed to transport goods between these regions. For Russia, this not only opens up new trade routes, but also strengthens its geopolitical influence in these regions. The total volume of Russian investments in the International North-South Transport Corridor will amount to 250-280 billion RUB by 2030.

[50] https://tass.ru/ekonomika/17777917

9.5 billion RUB will be invested in the development of the Russian Industrial Zone in Egypt by 2026[51]

Russia will continue to support the development of the Russian Industrial Zone in Egypt, with the allocation of 9.5 billion RUB from the federal budget for the project until 2026. The protocol signed in March 2023 by Mr. Denis Manturov, Minister of Industry and Trade of the Russian Federation, and Mr. Ahmed Samir, Minister of Trade and Industry of Egypt, is being ratified by the Egyptian parliament. The draft federal budget for 2024-2026 provides for state support of the Russian Industrial Zone in Egypt in the amount of 3.58 billion RUB for 2024 (the amounts for 2025 and 2026 are not specified).

Grainrus became an investor in Lever VC venture fund[52]

In April 2021 Grainrus invested in the international venture fund Lever VC. The fund supports projects in alternative proteins markets including plant-based and cultured meat, fish, seafood, cheeses and yoghurts. The total amount of Lever VC will be of at least 50 million US dollars. The investment will make it possible to attract international companies as technological partners in joint ventures. This could become a tool for the development of Russian projects for the processing and production of food ingredients using new technologies (eg creation of proteins through fermentation using yeast/fungi or application of cellular technologies). The fund's investment portfolio includes The Better Meat Co, Good Planet Foods, TurtleTree Labs, The Good Spoon, Avant, Bond Pet Foods, Marvelous Foods, and Mission Barns. Previously, the fund's managing partners have made early-stage investments in Beyond Meat, Impossible Foods, Eat Just, Memphis Meats, Geltor, and other companies.

[51] https://www.interfax.ru/business/925508

[52] https://www.agroinvestor.ru/investments/news/35739-greynrus-stala-investorom-venchurnogo-fonda-lever-vc/

India

In 2023 India's Adani Group holding bought Israel's Port Haifa for 1.2 billion US dollars[53]

In January 2023 one of India's largest holding companies Adani Group acquired the Port Haifa in the Mediterranean Sea for 1.2 billion US dollars as part of its distribution network development and expansion of its global presence. The Indian company plans to actively develop and modernise the port infrastructure, which will contribute to the development of trade relations between the two countries in the future. Adani Group is one of the largest business groups in India, influencing political and economic life in the country. The conglomerate holds leading positions in the energy, agriculture and defence industries of the South Asian republic.

Iran and India agree on Chabahar port development[54]

In January 2024 Iran and India reached an agreement on the modernisation and development of Chabahar Port located at the Gulf of Oman. The importance of including Chabahar port in the International North-South Transport Corridor (ITC) was emphasised. The Indian side confirmed its willingness to invest in the port development. Chabahar Port, the only one in Iran with direct access to the Indian Ocean, has an annual cargo turnover of more than 2 million tonnes and is one of the free trade zones in the country. For India the transit corridor through this port is of strategic importance and provides access to Afghanistan and Central Asian countries, bypassing Pakistan. In autumn 2023 Iran confirmed its readiness to conclude a long-term agreement with India for the port development. The new agreement will be valid for 10 years (with automatic renewal) and will replace the existing agreement under which India was allowed to operate at the Shahid-Beheshti terminal of the port, having previously equipped it with modern loading and unloading equipment. The signing of the agreement was preceded by the conclusion of the contract in May 2016. Iran, India and Afghanistan signed a trilateral agreement in May 2016 to establish a new transit route through the Chabahar port.

[53] https://tass.ru/ekonomika/17117499

[54] https://zdmira.com/news/iran-i-indiya-dostigli-soglasheniya-po-proektu-razvitiya-porta-chabakhar

China

The first Chinese yeast plant was opened in Dankov Special Economic Zone (Lipetsk region) in 2019[55]

In 2019 the Angel East Rus with a capacity of 30,000 tons of yeast and 30,000 tons of fertiliser per year and investment of 100 million US dollars, was built and launched on an area of more than 450 acres in the Dankov Special Economic Zone (Lipetsk region, Russia). Angel East Rus itself was founded on August 18, 2015 as a subsidiary of China's Angel Yeast. In addition to the plant construction the company has also built an efficient distribution network (over 200 distributors) covering the whole of Russia. A significant part of the manufactured products is also exported to the CIS countries, the Middle East and Africa.

Angel Yeast is a high-tech company that has been developing and mass-producing yeast and its derivatives for over 30 years. Founded in 1986, it is currently one of the top three global industry leaders. Currently Angel Yeast has 8 production bases in China and 2 overseas (in Egypt and Russia). Angel Yeast produces baker's yeast and ingredients, yeast extracts, feed yeast, microbial the, yeast for alcoholic beverages, dietary supplements and organic fertilisers. The company's products are known in more than 150 countries and regions of the world. All the production is certified according to the international BRC quality management control standards.

In 2023 the Russian plant of China's Angel Yeast announced an additional investment of 2.6 billion RUB to launch two more shop floors by the end of the year.

Blagoveshchensk — Heihe motorway bridge[56]

It has been planned to connect the Russian and Chinese banks of the border river in Blagoveshchensk for almost 40 years. In 2015 an intergovernmental agreement was signed between the Russian and Chinese sides to begin construction of a bridge, which will open up great export opportunities for the Amur region (main producer of soya exported to China). The construction work began with a total cost of 20 billion RUB in 2016. The Russian side assumed two-thirds of the costs, while the Chinese side's costs amounted to about 5.2 billion rubles. At the same time no budget funds were used in the construction of the bridge. The public-private partnership mechanism chosen by the parties provided that the concessionaire constructs the facility at its own expense and then reimburses the costs by charging tolls. It is planned to pay off the construction in 16 years of operation of the structure.

[55] https://web.archive.org/web/20191202202446/http://www.ez365.net/sk/2019/0303/8978.html;
https://www.interfax.ru/business/881490

[56] https://clck.ru/3AwJLG;
https://tass.ru/info/14877263;
https://www.vedomosti.ru/economics/galleries/2019/11/29/817496-stroitelstvo-mosta-cherez-amur

After all the work was completed, the Russian part of the bridge became the property of the Amur Region, while the Chinese part became the property of the Heilongjiang Province.

The bridge was completed by the end of 2019, but its opening was postponed from 2020 to 2022 due to the pandemic. On June 10, 2022 freight traffic began across this bridge. Cargo turnover in 2023 amounted to almost 550 thousand tons. The main goods exported through this border crossing include soy products, wood products and cosmetics. New cars and special equipment, equipment, electrical goods, consumer goods, postal items and fruits and vegetables are imported from China. In 2023 more than 51 thousand vehicles crossed the border by bridge, taking into account that the checkpoint is not functioning at full capacity due to the temporary operationt. It is planned to launch a permanent Kani-Kurgan checkpoint, which will annually be able to handle up to 2 million people per year in 2024. It is also planned to increase the daily vehicle throughput from 200 to 630 units. The facility is now 40% complete.

China is increasing its presence in the Brazilian market by acquiring shares in large Brazilian agritech companies[57]

Chinese agricultural companies have intensified cooperation with Brazilian partners through mergers and acquisitions. Since 2024 Syngenta and Yuan Longping High-Tech Agriculture Co. have been strengthening their presence in Latin America by acquiring shares in large agricultural companies. For example, Yuan Longping High-Tech Agriculture Co. will acquire a 90% stake in the Cereal Ouro soybean processing plant located in Rio Verde. This is not the first time Yuan Longping High-Tech Agriculture Co. has invested in the Brazilian market. Currently Yuan Longping High-Tech Agriculture Co. ranks third in the Brazilian corn seed market, behind Corteva from the U.S. and Bayer from Germany.

[57] https://www.globaltimes.cn/page/202402/1307493.shtml

Following the development path of Yuan Longping High-Tech Agriculture Co., Syngenta Vegetable Seeds announced that it has finalised the acquisition of Feltrin Sementes, a Brazilian vegetable seed company in 2023.

China Harbor Engineering Company Ltd. completed construction of Nigeria's first deep water port in November 2022[58]

At the end of 2022 China Harbor Engineering Company Ltd (CHEC) has completed a major maritime project, Nigeria's first deep water port located in Lagos. Built by CHEC, the Lekki Deepwater Port is Nigeria's largest seaport and one of the largest in the West Africa. Construction of the port began in June 2020. The port is designed to manage 2.7 million standard containers per year. The project was built by CHEC as part of China's Belt and Road Initiative. The Chinese company officially handed over the port to Nigeria upon completion but retained a 52.5% stake in the port's management company.

Chinese company signs agreement on joint development of special economic zone in Ethiopia[59]

In August 2023 China Civil Engineering Construction Corporation (CCECC) signed an agreement on joint development of a special economic zone in Ethiopia. The general director of the Gada SEZ, Motuma Temesgen, said that joint development of 1,000 hectares of land is planned. The project aims to establish a logistics, industrial, trade and business centre in Africa. The SEZ is expected to rapidly transform the country's economy and strengthen the partnership between China and Ethiopia, as well as attract additional foreign investment.

[58] https://rus.yidaiyilu.gov.cn/business/overseas/286702.htm; https://portnews.ru/news/341931/

[59] https://rus.yidaiyilu.gov.cn/business/project/329259.htm

South Africa

South Africa's leading food producer, RLC Foods, is acquiring shareholdings as part of its expanding strategy in the African region[60]

RCL Foods is one of South Africa's leading food manufacturers, producing a wide range of branded and private label food products ranging from basic household products to value-added products. As part of its expansion on the African continent the company acquired stakes in Royal Eswatini Sugar Corporation (29% stake, the company is the largest sugar and ethanol producer in Swaziland), Hudani Manji Holdings (33.5% stake, a Ugandan company is a large poultry producer), Mananga Sugar Packers Proprietary Limited (50% stake, an Eswatini-based company that specialises in sugar packaging and distribution). Through these acquisitions the company has gained access to markets in three countries as part of its expansion strategy.

[60] https://rclfoods.com/expand-into-africa/

Saudi Arabia

The largest dairy producer Almarai is aquiring land in the USA, Argentina and Sudan for self-sufficiency in alfalfa[61]

Saudi Arabia is among the world leaders in alfalfa consumption with the entire volume imported. The development of crop production in general and the alfalfa market in particular in Saudi Arabia was influenced by a three-year state program for the conservation of water resources, implemented in 2016-2019. As a result domestic production of alfalfa and other green feed crops in the country virtually ceased by early 2020. The decline in domestic alfalfa production has boosted foreign purchases and increased investment by domestic companies in hay and pelleted alfalfa production in the United States, Argentina and Sudan. For example, the largest company in Saudi Arabia, Almarai, which occupies about 30% of the dairy market in the country, in 2012 acquired its first plot of 30 thousand acres in Argentina for alfalfa growing. Moreover, since 2014 Almarai has been investing in farmland in Arizona and California. According to the USDA at the end of 2020 Saudi Arabian companies owned 18.6 thousand acres of land in the United States. More flexible legislation on groundwater conservation in Argentina and the United States allows Saudi Arabian companies to grow water-intensive crops, including alfalfa, in their territories. Alfalfa production in Sudan is a promising area for Saudi Arabian companies due to its proximity and availability of agricultural land suitable for growing the crop.

[61] https://www.thenationalnews.com/business/almarai-buys-us-land-for-its-hay-harvest-1.175830;
https://clck.ru/3AwKnB;
https://www.csmonitor.com/Environment/2016/0328/Why-Saudi-Arabia-bought-14-000-acres-of-US-farm-land

SALIC (Saudi Arabia) adds BRF (Brazil) to its portfolio of strategic investments, as part of its strategy to ensure the sustainability of national and global food security[62]

In July 2023 the Saudi Agricultural and Livestock Investment Company (SALIC) acquired a 10.7% stake (1.27 billion Saudi riyals) in the Brazilian company BRF (a global leader in the poultry sector). According to SALIC these investments reflect its continuous expansion to achieve its global and local strategic mandates in the area of food security. BRF, founded 85 years ago, is the third largest poultry producer in the world, the second largest halal company in the world and Brazil's leading poultry brand. It has an annual production capacity of more than five million tonnes of diversified products and employs 90,000 people in 130 countries. This investment contributes to improving the partnership between Brazil and Saudi Arabia in the agricultural industry and strengthening trade ties between the two countries. The decision is also important for the poultry industry development and for increasing the self-sufficiency of the KSA in poultry meat and poultry products.

SALIC has announced an increase in its stake in Brazilian meat company Minerva Foods[63]

Saudi Agricultural and Livestock Investment Company (SALIC) announced that it has increased its stake in Brazilian meat company Minerva Foods from 25.5% to 33.83%. Minerva Foods is one of the largest meat companies in South America and the second largest exporter in Brazil as it produces more than one million tonnes of meat annually. Minerva Foods mainly serves the needs of foreign markets and annually exports between 750 thousand tonnes of cattle meat to more than 100 countries. It is worth noting that the KSA consumes 550,000 tonnes of red meat annually, of which 70% is imported. The action emphasises SALIC's commitment to achieving the goals set by the KSA's food security programme and further strengthens trade relations between Brazil and Saudi Arabia.

[62] https://clck.ru/3AwL8q

[63] https://salic.com/news/salic-increases-its-stake-in-the-brazilian-meat-company-minerva-foods-to-33-83/

United Arab Emirates

Jenaan Investment LLC's investment activities[64]

Jenaan Investment LLC is a private investment company established in Abu Dhabi to develop agriculture in the UAE. The main industries for investment are grain and feed. The company has signed an agreement with the Abu Dhabi government to supply feed to livestock farms in the emirate. Jenaan Investment LLC is involved in manufacturing projects abroad with the aim of further exporting products to the UAE and the Middle East countries.

Among the BRICS countries the company's investment activities cover the markets of Saudi Arabia, Egypt and Ethiopia. In the KSA market Jenaan Investment LLC has implemented a project to open a company supplying cattle, animal feed and cooled beef from the East African countries. In the Egyptian market the company has implemented the following investment projects: Sharq Al-Owaynat, an agricultural holding company owning a land bank of 14,000 hectares and producing animal feed; El-Minya, an oilseed and date palm cultivation project; Ismailia, a buffalo milk production facility. In Ethiopia Jenaan Investment LLC implements projects through Tejaan Investment SC, a joint venture between Jenaan Investment LLC and Ethiopia's TIKOB Trading PLC. Activities include livestock farming and live animal export to the Middle East, as well as milk power production and export.

[64] https://prezi.com/p/z9dvc8vs7hkq/jenaan-invest-llc/

Abu Dhabi Investment Office invests in Indian e-commerce marketplace FreshToHome[65]

FreshToHome is an Indian company and one of the world's largest brands in fresh fish and meat e-commerce. The platform allows its members to purchase products directly from farms and sell them in the B2B and B2C segments. The platform operates in the Indian and the UAE markets. In 2020 FreshToHome together with Pure Harvest and raised a 41 million US dollars investment from the Abu Dhabi Investment Office.

The company will use the raised funds to execute projects to support food production in arid and desert climates; to implement an artificial intelligence-based virtual commodity exchange and aquaculture technology in the UAE; to integrate businesses from India and the Middle East into the FreshToHome supply chain.

AAAID's investment activities[66]

The Arab Authority for Agricultural Investment and Development (AAAID) is a leading financial institution actively investing in agriculture in the Middle East and Africa. It was established in 1976. Today it carries out 56 projects in 12 Arab countries. The institution's assets amount to 1.3 billion US dollars and total investments of 661 million US dollars. The Authority makes investments in crop production, livestock, processing and services in the agro-industrial sector.

Among the BRICS countries, AAAID's activity cover such countries as the KSA and Egypt. In Saudi Arabia the Authority holds a 45% stake in the shrimp producer Arabian Shrimp Company; a 48.7% stake in Arabian Fisheries Company; a 20% stake in a poultry holding Arabian Cooperative Company.

In the Egyptian market the AAAID is represented by the Arab Company for Production and Preservation of Crops, horticultural products and herbs processing and packaging company, with a 92.5% stake. The Authority also holds a 26.9% stake in sugar producer Faiyum Sugar Works Company and a 4.2% stake in veterinary vaccine producer MEVAC.

[65] https://clck.ru/3AwLrs

[66] https://www.aaaid.org/en/

Mubadala Investment Company's investment activities[67]

Mubadala Investment Company is a state-owned holding company and the sovereign wealth fund of the UAE. It manages a diverse portfolio of assets and investments in the United Arab Emirates and abroad. The company's total assets exceed 276 billion US dollars. The fund invests in infrastructure projects, agriculture and e-commerce.

The investment fund is implementing a number of projects in the Brazilian market. In particular, Mubadala Investment Company, together with the energy company EIG Global Energy Partners, manages the port of Asu through its Brazilian subsidiary Prumo Logistica. In addition, in August 2023 it was announced that Mubadala Investment Company acquired 31.5% of one of the largest sugarcane processors in Brazil, Atvos Agroindustrial S.A. The company's investment amounted to 102.8 million US dollars. Energy company Acelen Renewables (owned by Mubadala Investment Company) announced plans in April 2023 to invest 2.5 billion US dollars in soybean and palm oil refining to produce renewable energy. The processing facilities are expected to be launched in the first quarter of 2026 in the state of Bahia. The implementation of the project will help create more than 90 thousand jobs.

Mubadala Investment Company also invests in China's retail market. In 2020 a Chinese e-commerce platform for food and household goods raised an investment of 800 million US dollars from Mubadala Investment Company.

[67] https://www.mubadala.com/en/;
https://www.utilities-me.com/news/uaes-mubadala-to-invest-2-5bn-to-produce-renewable-fuel-in-brazil

Al Ghurair Investment's acquisition of the Saudi Arabian Third Milling Company

In April 2021 a group of companies comprising Emirati diversified holding company Al Ghurair Investment and food producer Masafi, as well as Saudi property developer Al Rajhi Holding Group, completed the 100% acquisition of Saudi Third Milling Co. from the Saudi Grain Organisation (SAGO, now the General Food Security Authority, GFSA).

Al Ghurair Investment is one of the largest investment holdings in the Middle East. Established as a trading company in 1960, it operates in such industries as grain, oil and fats trading, production and distribution of wheat flour, oats, semolina, eggs, animal feed and other. It is a regional leader in the flour milling industry.

Masafi was founded in 1977. The company produces beverages, cereals and FMCG-products. The range includes drinking water, rice, oat flakes and juices.

The deal was concluded as part of a privatisation plan that is part of Saudi Vision 2030. The group of companies aims to create a more sustainable commodities sector in Saudi Arabia, as well as increase the role of the private sector in the country's economy.

Iran

Iran and Afghanistan plan to complete the Khaf–Herat railway line[68]

Construction of the railway line between the cities of Khaf (Iran) and Herat (Afghanistan) began back in 2006. Iran was the main beneficiary of the project. In December 2020 the 140-kilometre section between Khaf and the Afghan village of Razanak was launched, as well as free trade and customs inspection zones on the border of the two countries. An 85 km section between the Afghan cities of Gurian and Herat, where work was temporarily suspended and a section in the Raznak area was destroyed, remains unfinished. Its total length should be 225 kilometres. Construction completion will serve to develop trade relations with the most prosperous city of Afghanistan, Herat, and create a corridor to the countries of the Middle East, as well as through the Iranian port of Chabahar to India, Europe and Southeast Asia. The volume of freight traffic here is expected to reach 6.8 million tonnes, including export of oil, construction materials and food from Afghanistan, as well as import of grain, dried fruits, machinery, equipment and medicines. In 2024 RZD International has also expressed interest in participating in this project and the project is expected to be fully completed within two years. The possibility of including this line in the Belt and Road Initiative with its further connection with the China-Kyrgyzstan-Uzbekistan railway is also being considered (The start of this project was announced in early June 2022). This line is also planned to connect with the future Trans-Afghan Highway, which will connect Central Asia with ports on the Arabian Sea coast.

Iran–Armenia cooperation on the Agharak–Norduz road bridge construction[69]

In February 2024 the 18th meeting of the Intergovernmental Joint Economic Commission was held in Tehran as part of the economic cooperation developmant, including transport infrastructure. One of the most important strategic agreements approved and signed at the event was the construction of a 90-km long North-South motorway leading to the Iranian border. The works have started on the 32-kilometre Agarak-Kajaran road (from the Iranian border). The contractors are Iranian companies Abad Rahan Pars International Group and Tunnel Sadd Ariana. The project includes construction of 17 bridges, 2 tunnels (total length of 900 m) and 5 traffic interchanges. The construction of the Agarak-Kajaran section can be completed by 2028. The exact timing of the entire project completion is still being clarified. The bridge will expand the possibility of goods cargo via the western branch of the route around the Caspian Sea within the framework of the International Transport Corridor North-South.

[68] https://tass.ru/ekonomika/20391699;
https://zdmira.com/news/afganistan-i-iran-planiruyut-zavershit-stroitelstvo-linii-khaf-gerat

[69] https://am.sputniknews.ru/20240306/v-armenii-opredelilis-so-stroitelstvom-dorogi-do-granitsy-s-iranom--73062137.html;
https://clck.ru/3AwTZd

Extraterritorial agriculture of Iran[70]

In recent years the Iranian government has shown increased interest in extraterritorial cultivation of agricultural land. According to the director of extraterritorial cultivation programme at Iran Ministry of Agriculture — Jahad of the Islamic Republic of Iran, 2 million hectares have been allocated for extraterritorial cultivation under the 7th National Development Plan for 2023-2027 to ensure food security. About 400,000 hectares are planned to be cultivated this year to meet the country's strategic needs for agricultural products.

The target countries for extraterritorial cultivation are Iraq, Pakistan, Kazakhstan, Armenia, Tajikistan, Uzbekistan, Russia, African and Latin American countries. Due to Iran's limited water and soil resources, climate change and increasing population, investing in extraterritorial agriculture is becoming a priority. Iran Ministry of Agriculture has already started an extraterritorial cultivation programme in Africa, starting with Tanzania.

Agricultural cooperation with Africa is a key area for Iran. The first meeting of the Joint Economic Committee of Iran and Tanzania is planned to be held in the near future to discuss possible agreements and memorandums.

[70] https://iran.ru/news/economics/125400/Iran_zainteresovan_v_eksterritorialnym_vozdelyvanii_2_mln_ga_zemli_za_rubezhom

Arab Republic of Egypt

Saudi food delivery startup Jumlaty and Egyptian retailer Appetito have announced a merger to create a new company NOMU

Egypt-based Appetito is an online retail shop that operates an app and delivers food products to cities in Egypt, Tunisia and Morocco. The shop offers its customers a wide range of food products, including dairy products, groceries, fruits and vegetables, frozen foods, confectionery and bakery products, as well as household goods.

Saudi-based Jumlaty is a wholesale food supply platform for restaurants, supermarkets and cafes. The company applies advanced technology and an extensive network of warehouses to supply food to both corporate and private customers. It has two areas of activity: wholesale supplies to catering sector and retail trade in food products via an online app.

In 2022 Jumlaty and Appetito announced their merger to create a new company, NOMU, a technological platform to build the food supply chain in the MENA region. In the company's catalouge there are many goods of Egyptian manufacturers, for example, oil and fat products of El Hanim, Qaleya, dairy products of Juhayna, Lamar, ready-to-eat products of Rehana and others. NOMU is currently present in Saudi Arabia, Egypt, Tunisia and Morocco. Operating an extensive network of 16 warehouses in these countries it is able to reach an audience of 25 million people, as well as 100,000 corporate clients in the food and beverage sector, including strategic partners such as Savola, Almarai and Nestle. The company's technological and infrastructural capacities allow it to deliver products to its customers in the shortest time: from one hour after placing an order to the next day.

Headquarter of NOMU is located in Riyadh, Saudi Arabia and the holding structure is located in Abu Dhabi International Financial Centre, UAE. The company plans to enter Pakistan and other key sub-Saharan countries in the near future.

Expert opinion

Shehim Mohammed

Director, Lulu Saudi Hypermarkets LLC

Lulu Group International is a highly diversified conglomerate with successful business entities in strategic locations worldwide, currently operates in 25 countries around the world. It is a world-renowned purveyor of an international business portfolio that ranges from hypermarket operations to shopping mall development, manufacturing and trading of goods, hospitality assets, and real estate. A significant part of the company's business portfolio is in BRICS our hypermarkets are located in India, the UAE, the KSA and Egypt, and the products of the largest producers are displayed on shelves. This allowed us to form a deep Insight of the markets, potential, consumer preferences and current trends.

The consumer has become cost conscious primarily as well quality aspirant. Supply chain disruption and COVID-19 ensued triggers have forced this tweak. Value on purchase and chemical free produces are desired. Quality is the determining factor. Nevertheless, since the cost of living is a matter of concern, customers are also in a lookout for value.

Companies that enter retail chains pay special attention to the promoting tools. They hold various campaigns (2+1 free or 50% discount for the second product), adapt the packaging, introduce new flavors, taking into account local taste. Thus, for successful work in foreign markets, it is important not only to enter but also to increase the share as well as to keep this for a long time. So, the suppliers have to be aware of marketing strategy when it comes to the new market.

3.3. Practices of product promotion in export markets

Brazil

Promotion of Brazilian poultry meat in the Middle East markets

BRF S.A. is one of the largest food companies in the world, specializing in the production of chicken, pork and frozen foods. The company operates in more than 150 countries and is the largest poultry producer in Brazil. Exploration of the Middle Eastern markets began in the 1970s when the company began exporting products to the region, primarily under the Sadia brand. To promote its products and expand its presence, BRF S.A. uses a set of marketing tools, including participation in exhibitions and events, advertising and educational podcasts, as well as cooperation with large companies and joint projects. For example, the company is involved in a project to promote Brazilian chicken meat to foreign markets under the Brazilian Chicken brand, which is implemented by ABPA (Brazilian Animal Protein Association) in partnership with Apex-Brasil (Brazilian Trade and Investment Promotion Agency).

Participation in international exhibitions

BRF regularly participates in major international food and beverage exhibitions. For example, for many years it has been participating in Gulfood, the largest food exhibition in the Middle East, promoting its brands such as Sadia, Sanvit, etc. The company also regularly attends SIAL, Anuga, Saudi Food Expo and WorldFood.

Acquisition of production facilities

The Middle East region is BRF's priority destination for poultry export. For this purpose in 2016 it founded a subsidiary company Sadia Halal which controls all assets related to the production, distribution and sale of products in Muslim markets, mainly in the Middle East. In 2014 and 2020 two production plants were opened in the UAE and the KSA, respectively. From 2014 to 2016 the company acquired distribution centers in Oman, Kuwait and Qatar. To date BRF S.A. operates 5 production plants, 1 innovation center and 11 distribution centers in the region.

Outdoor advertising

During the 2022 FIFA World Cup in Doha Brazilian poultry was advertised on outdoor banners. The campaign was implemented in partnership with the Brazilian Trade and Investment Promotion Agency. 30 panels have been installed along the city's avenues, conveying messages in Arabic and English to local consumers and foreign citizens traveling around Doha. The advertising panels conveyed the following message: “Halal Chicken from Brazil: bringing flavor and sustainability to over 150 countries. Try it in Qatar!”. According to the Brazilian Animal Protein Association the advertising campaign is aimed at strengthening Brazil's presence as a leading supplier of chicken protein to the Qatari and, broader, Halal markets.

Promotion of Brazilian beef in Iraq and the Middle East markets

The promotion of Brazilian beef in the Iraqi market is provided by ApexBrasil (Brazilian Trade and Investment Development Agency), ABIEC (Brazilian Beef Exporters Association) and the Arab-Brazilian Chamber of Commerce.

Organization of fairs

ApexBrasil sponsored the “Brazil in Iraq Reconstruction” fair. Brazilian products have been present on the Iraqi market since the 1970s and are already well known to the Iraqi people. In turn, the Iraqi Embassy invited Brazilian exporters to participate in the Baghdad International Fair, a cross-industry annual event.

Industry exhibitions

During Gulfood (Dubai) in 2023 ABIEC took part in a series of promotions aimed at increasing Brazil's profits in the Arab market. One of them was the signing of a memorandum of understanding to expand the export of Halal products. In addition, the Association took part in the event to present the Halal do Brasil project, developed in partnership with the Arab-Brazilian Chamber of Commerce. The goal of the project is to expand and stimulate the production and export of Halal products, thereby increasing the competitiveness of Brazilian meat in this very attractive market segment and region.

At the 2022 SIAL in Paris ABIEC and FAMBRAS Halal Certification (the largest certifying body for Halal products and services) signed a Cooperation Agreement to exchange information on the Halal meat market. Through the partnership organizations share statistical data allowing for a better understanding of trends in the halal market.

Field workshop

The Arab-Brazilian Chamber of Commerce and ABIEC signed a technical cooperation agreement in November 2016 in São Paulo to work together on advertising and building the image of Brazilian beef in Arab countries. The agreement aims to increase the market share of Brazilian beef in Arab countries by cooperation in promotional activities, building relationships between Arab and Brazilian importers and exporters.

Russia

Russian Crab Company Group actively promotes Russian crabs in foreign markets using various marketing tools

Russian Crab Company Group is the large crab harvesting company in the Far East and one of the leading in Russia. The Company's annual quota is more than 18,000 tons, that is the largest share of quotas within Far Eastern Basin. The company specializes in catching Red King Crab, Blue King Crab, Brown King Crab, Opilio Snow Crab and Horsehair Crab in Okhotsk Sea, Bering Sea and the Sea of Japan. For many years Russian Crab Company Group has been considered a premium product that is constantly in demand in many countries. To promote its products in foreign markets the Russian Crab Company Group uses a set of marketing tools, the most effective of which are the following: participation in international exhibitions and events, facilitation of tastings and workshops.

Participation in international events

One of the important marketing tools for the company to promote its products is participation in international exhibitions and various gastronomic festivals. For example, to promote its products in the markets of the Middle East the company regularly participates in the largest food event in the region — the Gulfood exhibition. The company also regularly participates in such international events as Seafood Expo, SIAL, the fishery exhibition in Qingdao (China Fisheries & SeaFood Expo) and others.

In October 2023 Russian Crab Company Group took part in the Crab Festival in Shanghai. The event was aimed at popularizing the signature Russian product and was held with the support of Russian crab farming companies Antey, Sigma Marine Technology and Russian Crab Company Group. Russian Crab Company Group presented processed and frozen products from premium types of crab, which were used by restaurants for the festival menu. For three days guests of the event tasted delicacies of the deep sea of the Far East and northern Russia, learned to cook dishes containing crab meat, and also learned more about general Russian gastronomic culture.

Tastings and culinary workshops

At almost all international events, the company organises tastings and workshops on cooking crab dishes with professional chefs.

King crab and premium crabs are a delicacy that requires a certain presentation. For example, Chinese consumers are familiar with Russian crab, but eat it primarily in restaurants. Last year during the Russian Crab Festival in Shanghai, in order to promote its products the company organized culinary workshops. During these workshops Chinese chefs used different parts of the crab to prepare traditional street food dishes. The company is considering the opportunity of inviting Russian chefs to culinary workshops to further expand consumers' understanding of crab tastes and their use in cuisine. The company also plans to collaborate with manufacturers of other premium food products to create an interesting combination with crab or its gastronomic accompaniment.

At the same time tastings and workshops can be aimed at both a wide audience and directly at professionals. In Saudi Arabia the company presented its product to the restaurant business and hoteliers in the format of a business tasting. This made it possible to demonstrate the Russian delicacy not only from the gastronomic point of view but also as an element of the premium menu, which involves exclusives and a certain presentation.

Russian wine of Abrau-Durso Group of companies conquers the world market

Abrau-Durso Group of companies is a large winemaking enterprise in Russia, which sells products not only on the domestic market but also actively supplies products to other countries. Since 2011 the company's wines have won more than 181 awards at international tasting competitions. Among them are gold medals from the oldest tasting competitions in the world: International Wine & Spirit Competition (IWSC), Decanter World Wine Awards, International Wine Challenge. Abrau-Durso is especially proud of its achievements at the largest international competition of sparkling and champagne wines CSWWC. In 2021 Abrau-Durso became the champion in the Rising Star category, in which experts annually recognize the most promising producer of sparkling wines in the world.

The Abrau-Durso Group of companies produces sparkling wines, still wines, as well as cider, strong alcoholic beverages, energy drinks and carbonated soft drinks, as well as bottled artesian spring water. In 2023 the Group's combined sales totalled 56.704 million bottles.

Abrau-Durso has been successfully exporting its sparkling wines since 2015; the company's export geography covers more than 28 countries (as of 2021). The company uses various marketing tools to promote its products.

The company regularly participates in various international exhibitions and events. Thus, the company took part in the largest annual international exhibition TFWA, (held in Cannes, France) in 2019 and became the sole representative of Russian winemaking at the event. All product lines of the Abrau-Durso Group of companies were presented at its stand, including the collection of still wines from the Vedernikov Winery.

In 2021 Abrau-Durso won a gold medal and beat Moet & Chandon at the international winemaking competition Champagne & Sparkling Wine World Championships — 2021. This is the largest and most prestigious professional competition for sparkling wine producers in the world. For the first time in the history of the competition Russia won the honorable “gold”.

In 2023 Abrau-Durso hosted an international enotourism forum. This was the first time when Russia acted both as a host and as a full member of the World Wine Tourism Organization (GWTO). Three Russian wineries, actively developing the wine tourism industry, joined the GWTO at the forum. Directly at the Forum, they were presented with membership certificates by the guest of honor of the event, GWTO President José Antonio Vidal. We can congratulate Abrau-Durso, Winepark by Mriya and Château de Talu on joining the authoritative international organization.

Sparkling and still wines of Abrau-Durso Group of companies were awarded five awards at the largest Korean professional tasting competition held in Seoul in 2023 — one gold, three silver and one bronze medal. Wines from Abrau-Durso Group of companies became the first Russian winners of the Korean Wine Challenge awards. The tasting program featured wines from the most renowned wine-producing regions of the world — France, Italy, Spain, Chile and others. This year, a panel of 51 of Korea's best sommeliers judged still and sparkling wines of a wide variety of styles. Wines from Abrau-Durso Group of companies became the only Russian wines in the entire history of the competition to win prizes and receive high notes from experts.

India

LT Foods Americas promotes Indian rice in foreign markets

LT Foods Americas is a leading rice producer and exporter in India and has a long history of serving overseas markets, making its Daawat and Royal rice brands some of the most recognized in the world. For a long time working in foreign markets, the company's products are represented in North America, the EU, Asia-Pacific and Africa, the company has used various marketing campaigns to increase awareness of its products. Among the most effective promotion strategies are the opening of subsidiaries in other countries to expand their presence, advertising campaigns involving bloggers and famous chefs, positioning products as products for a healthy lifestyle, as well as sponsorship and participation in various events.

Diversification of supply chains by opening new production facilities in other countries and acquiring stakes in foreign companies

In 2023 LT Foods Americas' organic division, Nature Bio Foods, announced the opening of a new facility in Uganda[71]. The move is part of the company's business diversification strategy aimed at reducing production and other risks. The new enterprise will purchase and process soybean meal, as well as sell chia, sesame and sorghum seeds. The production capacity of the enterprise will be 10 thousand tons in he first year, and by the end of 2024 it is planned to increase it to 18 thousand tons. The initial capital costs for this new venture amounted to 500 thousand euros. The company expects revenue of 15 million euros in the next 3-4 years.

In 2022 LT Foods Americas announced the acquisition of 51% of the shares of the American company Golden Star Trading along with its best-known brand Golden Star[72]. Golden Star Trading is a major importer and distributor of rice in North America, and its rice brands are among the most recognized in the region. This strategic acquisition allowed LT Foods Americas to strengthen its position in the US market.

Advertising and collaborations with celebrities

To promote its products in the USA market LT Foods Americas produces various commercials featuring celebrities and collaborates with famous chefs. Thus, LT Foods Americas releases short videos on American cable television Time Warner Cable on Wednesdays at 7:00 pm, featuring top chefs cooking various dishes with the company's products. The ToNY (Taste of New York) channel is watched by more than 3.5 million viewers weekly and for the last 9 years it has been covering dishes and recipes from all over the world. The Taste of New York is also active on social media (Instagram, YouTube and Twitter). For example, one of the invited guests for

[71] https://clck.ru/3AwXGp

[72] https://www.ltgroup.in/pdf/LTFA-Acquires-51-Stakein-Golden-Star-Trading-Inc.pdf

the video was the chef of the prestigious Indian restaurant Junoon, awarded with a Michelin star, Kamran Nasim, who cooked the traditional Indian dish biryani using the Royal brand basmati rice.

LT Foods Americas also invites well-known restaurateurs and celebrities to become ambassadors for its rice brands. The most famous representatives of the brand in the USA were the Indian actor Amitabh Bachchan, known throughout the world for more than 180 films. In 2016 Maneet Chauhan, an eminent chef, TV presenter and restaurateur, was chosen as the brand ambassador[73].

LT Foods Americas has partnered with renowned chef Sanjeev Kapoor to promote the Daawat brand. This partnership supports the ever increasing brand awareness and consumer trust in the company's products. Sanjeev Kapoor has been hosting the cooking show Khana Khazana on Zee TV for 16 years. The show is broadcasted in 120 countries with an audience of more than 500 million people.

Participation in international exhibitions

LT Foods Americas regularly attends international food shows to showcase its products and establish business connections. For example, restaurateurs regularly takes part in Anuga (Germany) and the Summer Fancy Food Show (the USA).

[73] https://www.ltfoodsglobal.com/taste-of-new-york/;
https://www.tasteofny.com/;
https://www.ltfoodsglobal.com/lt-foods-americas-presents-chef-maneet-chauhan-as-royal-basmati-rice-brand-ambassador/;
https://www.ltfoodsglobal.com/amitabh-bachchan/

China

Cross-border e-commerce as a factor driving the growth of Chinese product export to foreign markets[74]

Chinese online retailers are accelerating towards the expansion of their global presence in a bid to attract new customers and diversify revenue sources as a growing number of Chinese sellers choose to sell their products abroad through cross-border e-commerce platforms. As a relatively new type of international trade, cross-border e-commerce has become an important driving force stimulating China's exports amid the economic slowdown and external uncertainty. For example, online discounter PDD Holdings (parent company of Chinese e-commerce platform Pinduoduo) recently announced that its cross-border e-commerce platform Temu, which offers discounted products, is now present in more than 50 countries in North America, Europe and APAC.

Short video app TikTok has also launched e-commerce service TikTok Shop allowing users to discover and directly buy products featured in live broadcasts and short videos. TikTok began providing e-commerce services in 2021 in Indonesia. Today these services cover more than 10 countries, including the US, UK, Malaysia, Thailand, Philippines and Vietnam. Overall, cross-border e-commerce has become a vital channel for Chinese SMEs to expand into overseas markets.

At the same time in 2023 TikTok announced its plans to invest 12.2 million US dollars in the development of the digital economy of Southeast Asia to help more than 120 thousand small businesses in the region sell their products through online commerce. The main directions of this campaign are: providing grants for digital skills training, advertising loans for small businesses, including micro-enterprises in rural and suburban areas.

Experience in promoting dairy products from the Chinese company Inner Mongolia Yili Industrial Group in foreign markets

The Chinese company Inner Mongolia Yili Industrial Group is the largest manufacturer and exporter of dairy products in China. To promote its products the company conducts combined marketing campaigns, to increase its brands awareness. Among the most effective campaigns are: sponsorship of various international events and sporting events, participation in world experience exchange programs and participation in various social events.

[74] https://www.chinadaily.com.cn/a/202404/05/WS66162d2fa31082fc043c1342.html; https://rus.yidaiyilu.gov.cn/business/overseas/324303.htm

Sponsorship at various international and sports events

Inner Mongolia Yili Industrial Group actively participates in various activities and events in Asia, be it international exhibitions, festivals or sporting events:

- 2008 and 2022. The company sponsored the Olympic Games in China. Inner Mongolia Yili Industrial Group organized demonstration and tasting stands, held competitions and distributed promotional materials;
- 2022. The company was chosen as an official sponsor of the G20 summit, which was held in Indonesia.
- 2023. Inner Mongolia Yili Industrial Group became the official partner of the AFC Asian Cup Qatar, the most famous football championship in Asia, which took place from January 12 to February 10, 2024. Cremo, a brand of Inner Mongolia Yili Industrial Group, officially announced its partnership at the event as an ice cream supplier and expressed his continued commitment to supporting healthy lifestyles and promoting healthy eating;
- 2023. The company is one of the sponsors and partners of the FIBA Basketball World CUP.

International promotion of products within the framework of the "One Belt — One Road" initiative

As a member of the Belt and Road Initiative Inner Mongolia Yili Industrial Group is committed to expanding cooperation and sharing experience in the dairy industry. For example, over the past 9 years Inner Mongolia Yili Industrial Group has been conducting a "visiting Yili" campaign. As part of this program, consumers were told about the benefits of dairy products and were given the opportunity to observe and participate in the process of feeding dairy cows and bottling milk on production lines.

In 2023 the "Visiting Yili" campaign was upgraded and became the "Yili Quality Experience Month" featuring the Milk Silk Road campaign, dedicated to the origins of the company's quality products. As part of this event, in addition to the process of collecting milk and producing dairy products, consumers were also shown ways to control product quality, from the sources of milk to the sale of finished products. During the event, the key stages of the innovative activities of Inner Mongolia Yili Industrial Group in the process of globalization were also highlighted, such as:

- construction of Yili Modern Intelligent Health Valley, designed to become the World's Dairy Silicon Valley;
- activities of Yili Innovation Center Europe (Yili Innovation Center in the European Union);
- successful commissioning of ice cream production plants in Southeast Asia.

Combining innovation and international experience, Inner Mongolia Yili Industrial Group has created an ecosystem of 15 innovation centers that brings together enterprises, universities, research institutes and end users to promote innovation in the global dairy industry.

Participation in social projects and ensuring sustainable development[75]

Inner Mongolia Yili Industrial Group was recently awarded the 2022 Business Indonesia Corporate Social Responsibility Awards for the highest level of corporate social responsibility. Its Indonesian subsidiary Yili Indonesia, which produces one of the most popular ice cream brands in Southeast Asia, was called "the most actively collaborating food company in promoting vaccination and combating COVID-19." In Indonesia, the company implemented 12 programs to help the country combat the COVID-19 pandemic, providing local residents with more than 100 thousand face masks, medical gowns, special protective glasses and more than 600 thousand pieces of ice cream. Inner Mongolia Yili Industrial Group also introduced a series of incentives and subsidies for local distributors to increase their income, and donated a large number of freezers and ice cream carts to create more jobs and support the recovery of the local economy.

In addition to corporate social responsibility, Inner Mongolia Yili Industrial Group has also contributes to sustainable development. In June 2022 the company introduced new packaging that uses ink-reducing printing technology. This cuts ink consumption by up to 60%, as the outer portion of the packaging is made from 80% recycled paper, and also reduces plastic use by 260 kg for every 100,000 packages.

Tools for promoting products of the Chinese company Mengniu Group

The Chinese company Mengniu Group is the second largest dairy producer in China and over the past 10 years has been gradually expanding its presence in foreign markets and working to increase awareness of its products. The company's most efficient strategies are to participate as a sponsor in various international events and sporting events, as well as to expand its global presence by acquiring shares in foreign companies.

Sponsorship of various international and sport events

Mengniu Group actively participates in various international events, being a sponsor and official partner of such events. For example, in 2018 Mengniu Group became the official sponsor of the 2018 FIFA World Cup, Russia. The manufacturer's brand was presented on all key promotional platforms: on FIFA Internet platforms, on advertising boards in stadiums and on tickets for all matches of the tournament. The head of the company claimed in his interview that this sponsorship provides a unique opportunity for the company to present the products of the Chinese dairy industry to the whole world, which has a major effect not only on the company, but also for on entire Chinese dairy industry.

[75] https://www.yili.com/en/global/asia/1157;
https://asiafoodbeverages.com/yili-wins-award-for-csr-in-indonesia/;
https://www.chinadaily.com.cn/a/202306/02/WS64799a10a3107584c3ac3996_1.html

Expanding its global presence through the acquisition of shares of foreign companies[76]

Over the past 8 years Mengniu Group has been expanding at the foreign markets via various mergers and acquisitions, mainly in the Asia-Pacific region. For example, in 2018 the company built a specialized dairy plant in Indonesia and began selling dairy products under the YoyiC brand. In 2019 it acquired two Australian companies — Bellamy Organic for 1.5 billion australian dollars and Lion Drinks and Dairy (LD&D) for 600 million australian dollars. In 2021 Mengniu acquired Southeast Asia's leading ice cream brand Aice.

[76] https://clck.ru/3AwZib;
https://tass.ru/press-relizy/5370715;
https://www.mengniuir.com/en/milestone.aspx;
http://milkua.info/ru/post/kitajskaa-mengniu-realizuet-strategiu-dominirovania-na-mirovom-molocnom-rynke

South Africa

Regular participation of South African fruit and vegetable producers in international exhibitions

For many years the production of fruits and berries has been an important sector of South African agriculture. Every year the country is actively increasing their production and export. For South African companies specializing in growing fruits, one of the important ways to promote their products is to participate in various international exhibitions.

One of the most important exhibitions dedicated to fruits and vegetables farming, storing and distributing is Fruit Logistica, annualy held in Berlin. In 2023 it was attended by more than 63 thousand visitors from 140 countries and more than 2,600 exhibitors from 92 countries. South African companies are regular participants in this event, thereby creating a positive image of local fruits and increasing awareness of their products.

The Middle East, especially the UAE, is an attractive direction for South African fruit and horticultural export, as evidenced by continued growth in exports. To promote their products, South African companies are regular participants or the largest annually held food exhibition in the Middle East, Gulfood. For example, in 2023 a business delegation of 16 South African agro-processing companies, including the South African Fruit and Vegetable Export Council (SAFVEC), presented their products at this exhibition in Dubai. African companies claim that the participation is aimed at developing export markets for South African goods and services and attracting new foreign direct investment into the country

[77] https://clck.ru/3AwaTy

https://www.producereport.com/article/press-release-fruit-logistica-2020-brighter-future-fresh-produce

https://clck.ru/3AwaUJ

Promotion of South African wines in international markets[78]

Wine industry in South Africa has been actively developing over the past 20 years. Entire departments dedicated to wines from South Africa are appearing on the shelves of retail chains around the world, many of which are not inferior in quality to European ones. To promote their products, wine producers also take part in international exhibitions, such as ProWein.

ProWein is the leading international trade fair for wine and spirits. The wine fair has been held in Düsseldorf every March since 1994. The promotion of South African wine in international markets is the responsibility of a non-profit industry body, Wines of South Africa (WoSA), which organizes participation of South-African enterprises in various forums and exhibitions. WoSA works closely with the tourism sector to promote wine tourism in Cape Town. In addition, WoSA regularly conducts marketing seminars for members to highlight changing international market needs, demands and opportunities.

In 2023 Wines of South Africa resumed its presence at ProWein in Germany after a long break due to the COVID-19 pandemic. More than 100 South African wine producers presented their products at the WoSA pavilion. The exhibition included a themed tasting area “Discover South Africa”, which became one of the main attractions of the WoSA pavilion.

In 2023 Wines of South Africa resumed its presence at ProWein in Germany after a long break due to the COVID-19 pandemic. More than 100 South African wine producers presented their products at the WoSA pavilion. The exhibition included a themed tasting area “Discover South Africa” becoming one of the main highlights of the WoSA pavilion.

[78] https://news.wine.co.za/news.aspx?NEWSID=40819;
https://www.wosa.co.za/Awards/International-links/

Saudi Arabia

Experience of promoting Almarai products in foreign markets

Saudi Arabia's Almarai, one of the largest dairy producers in the region, is widely known throughout the world for its effective marketing strategies to increase brand awareness. The most effective measures of promoting its products in foreign markets are active sponsorship activities and participation in various international exhibitions and events.

Sponsorship activities

In 2024 Almarai sponsored the Arab Badminton Championships, which was organized by the Saudi Arabian Badminton Federation and recently concluded in Riyadh with the participation of more than 100 participants from 15 countries[79].

Since 2019 the company has been a permanent sponsor of the Hail International Rally, which is part of the FIA World Rally Championship program. Representatives from different countries take part in the championship every year; in 2024 it was held in April in the north of the Kingdom of Saudi Arabia[80].

In 2024 the company sponsored the GCC Future Impact Forum 2023, (May 30-3, Riyadh) which brought together all representatives of the Middle East countries[81].

[79] https://www.almarai.com/en/corporate/media-center/almarai-news/almarai-badminton-championship

[80] https://www.almarai.com/en/corporate/media-center/almarai-news/hail-international-rally-19th

[81] https://www.almarai.com/en/corporate/media-center/almarai-news/almarai-gcc-future-impact-forum

In 2024 the company also sponsored the College of Applied Health Sciences' 3rd international conference, The Future of Healthcare and Improving Healthy Lifespan. It was held under the patronage of the Minister of Education and Chairman of the Board of Directors of King Saud University in Riyadh from 14 to 15 February 2024[82] Almarai's sponsorship of the conference was part of its corporate social responsibility program to promote public awareness of the importance of healthcare.

In 2023 the company also sponsored the Al-Roya Business Award 2023 held in the Sultanate of Oman[83].

Promoting Tanmiah Food Company products in international markets

Tanmiah Food Company is a leading poultry company in the Middle East. Its products, which are widely recognized for their high quality and compliance with all modern standards, are supplied to the markets of the Middle East and Africa. One of the company's strategic goals is to expand its international presence and increase the recognition of its brands in foreign markets.

In 2023 Tanmiah Food Company represented Saudi Arabia at the Saudi Village event in Italy, celebrating the 90th anniversary of diplomatic relations between the two countries[84]. At this event, representatives of the company introduced foreign guests and residents of Rome to the rich culture, history, heritage and cuisine of Saudi Arabia, inviting them to visit the Kingdom of Saudi Arabia.

Tanmiah Food Company became Silver Sponsor of The Food for Future Summit 2022.[85] The Summit was attended by public figures from around the world, heads of international companies, renowned scientists, innovators in the field of agriculture and food industry, as well as renowned academics sharing innovative ideas and advanced technologies needed to accelerate the achievement of food security goals.

[82] https://www.almarai.com/en/corporate/media-center/almarai-news/almarai-sponsors-conference-future-healthcare

[83] https://www.almarai.com/en/corporate/media-center/almarai-news/almarai-sponsors-alroya-award

[84] https://tanmiah.com/press_release/Saudi-Village-(Italy).php

[85] https://tanmiah.com/media/SilverSponsorFuturesummit.php

In 2022 the company signed a strategic partnership with Tyson Foods, a global leader in poultry and animal protein[86]. Under the agreement Tyson acquired interests in the subsidiaries Supreme Foods Processing Company and Agricultural Development Company and also committed to participate in joint future investments in Tanmiah Food Company's production facilities.

Tanmiah Food Company has been a regular participant in such international exhibitions as Gulffood, Middle East Poultry Expo and SIAL for many years, and the company's demonstration stands are among the brightest and largest[87].

[86] https://tanmiah.com/media/TysonFoods22.php

[87] https://tanmiah.com/media/tanmiah-participates-at-sial-in-paris-2018.php

United Arab Emirates

Role of Al Foah in promoting date exports[88]

In 2005 in order to develop the production of dates and increase their export the Government of Abu Dhabi established the Al Foah Company. The company's goal is to purchase products from local farmers and further process and export them. Al Foah processes 110 thousand tons of dates per year, 90% of this volume is sold on export markets. In 2022 Al Foah became part of the Agthia Group, one of the largest food holdings in the UAE. Today Al Foah is the world's largest date processor.

In 2022 Al Foah launched eZad, an electronic marketplace. The platform allows farmers to sell surplus products both on the domestic market and abroad. The purpose of the site is to provide conditions for the sale of all produced products, as well as to guarantee farmers payment for the goods. Products are sold through electronic auctions. More than 1.2 thousand buyers from the UAE, the KSA, Jordan and other Middle East countries are registered on the site. More than 500 farmers offer their products through the platform.

[88] https://alfoah.com/;
https://www.ezad.ae/en/;
https://clck.ru/3Awc5x

Promotion of Al Ain Farms dairy products in international markets[89]

Al Ain Farms is the first dairy company in the UAE, founded in 1981. It operates its own five dairy farms. The company owns a herd of 1.8 thousand camels and 15 thousand cows. The product range includes cow and camel milk, freshly squeezed juices, table eggs and broiler chickens.

The company is an exporter of dried camel and UHT milk. It sells its products to the Persian Gulf countries, China and other countries in Asia and Europe.

The main importer of Al Ain Farms powdered camel milk is China. The promotion of the company's products was facilitated by its positioning as healthy and natural immunomodulatory agents, also suitable for use by people with diabetes. According to Al Ain Farms management, Chinese consumers, if compared to consumers from other countries, pay much more attention to the impact of the food they consume on their body. In addition, the company is actively working on developing export packaging: in addition to the traditional bagged packaging of 25 g, 400 g and 25 kg, when entering the Chinese market, the company launched sales of powdered camel milk in 400 g cans.

Al Ain Farms uses e-commerce platforms as distribution channels. In the Chinese market the company's products are sold on JD.com through direct online sales. Additionally, in August 2022 Al Ain Farms launched its products on Dubuy.com, a B2B marketplace developed by logistics company DP World. Thanks to entering this site, the company was able to supply products to African countries, including Kenya, Tanzania, Rwanda, Ghana and Zambia.

[89] https://www.alainfarms.com/;
https://clck.ru/3AwcDf;
https://gulfbusiness.com/al-ain-farms-to-offer-dairy-products-in-africa-through-dp-worlds-dubuy-com/

Iran

Promotion of Iranian food products on the Russian market

Over the past 2 years, Iran has continued to actively increase the volume of food supplies to the Russian market. To this end, Iranian suppliers actively participate in various exhibitions and fair events on the territory of the Russian Federation and actively promote their products via electronic platforms.

Food exhibitions and trade fairs[90]

Since 2022 Iranian companies are more actively represented at Russian agricultural and food exhibitions. In 2022 the 31st Russian international food exhibition Worldfood was held in Moscow with more than 700 companies from 25 countries taking part at its programme. At this exhibition 23 Iranian companies actively presented various Iranian products, including dried fruits, fruits and vegetables, pistachios, dates, candied fruits, sweets and chocolates, snacks and food packaging. Four days after the end of the exhibition some large chain stores in Russia agreed with Iranian companies to supply their products.

In 2024 Iranian manufacturers presented their products at the 31st International Exhibition of food, beverages and raw materials for their production “Prodexpo-2024” in Moscow. 2,145 companies from 40 countries, including Iran, participated in the exhibition. The opening ceremony of the pavilion of the Islamic Republic of Iran took place in the presence of the Ambassador of Iran in Moscow, Kazem Jalali. The exhibition featured 12 Iranian producers of food products, raw materials and packaging.

Promotion through digital platforms

When promoting their products on the Russian market Iranian companies pay special attention to marketplaces. Iranian companies are widely represented on Ozon and Wildberries — Russian B2C platforms offering consumers a wide range of products and beverages with long shelf life, including dried fruits, sweets, canned sauces and dressings, as well as tea and spices. In the item card of each product you can find a detailed description and cooking tips. You can also regularly find discounts (2+1 free or -50% for the second product in your cart).

[90] https://clck.ru/3AwcKb;
https://news.ru/society/fganskaya-coca-cola-i-iranskie-prokladki-kto-zameshaet-zapadnyj-import/;
https://ru.irna.ir/news/85377954/

Ethiopia

Branded coffee from Ethiopia[91]

Even though some of the world's best coffees, such as Harrar, Sidamo and Yirgacheffe, are produced in Ethiopia, Ethiopian farmers have long received only 5-10 percent of the retail price of the final product as most of the profits were collected by distributors. In an effort to cut this gap the Ethiopian government launched the Ethiopian Coffee Trademark and Licensing Initiative in 2004. The initiative was organized by a Committee of Stakeholders, a consortium including cooperatives, private exporters and the Ethiopian Intellectual Property Office (EIPO), as well as other interested government agencies.

One of the main issues on the agenda was the use of intellectual property rights, namely: what would be the best approach to register the varieties of the country's signature product — either geographical indication or a trademark. The committee decided to register Ethiopian coffee varieties as trademarks because coffee in Ethiopia is grown on more than four million small plots of land accommodating approximately 600,000 independent farmers scattered throughout the country, even in its remote areas. And while Ethiopian coffees are named after the specific regions of the country, the local coffee is produced not in one isolated region, which makes its grading by a geographical indication impossible. The government of Ethiopia is the copyright holder of the trademarks.

The US National Coffee Association opposed this decision to register trademarks. The main company that objected to this decision was the American coffee franchise chain Starbucks Coffee Corporation. In 2006 after a year of litigation, Starbucks finally agreed to sign a trademark licensing agreement that would recognize Ethiopian ownership of the names Harrar, Sidamo and Yirgacheffe.

The Ethiopian government hired design agency Brandhouse in 2008 to develop an umbrella brand for Ethiopian coffee (Ethiopian Fine Coffee), as well as brands and logos for the Harrar, Sidamo and Yirgacheffe varieties for subsequent use on coffee packaging and general transportation bags.

Fine Coffee logo on coffee transport bag

The conflict with Starbucks has attracted a lot of public attention to Ethiopian coffee, resulting in increased demand and higher prices for the product. In turn, the decision to brand its coffee allowed Ethiopia to differentiate Ethiopian coffee from the coffee of other countries. The country's policy gave the coffee farmers the opportunity to participate in regulation of product prices, resulting in overall increase of their income and improvement of their standard of living. It also set a notable precedent for commodity producers in other developing countries.

[91] https://www.ompi.ch/ru/web/ip-advantage/w/stories/the-coffee-war-ethiopia-and-the-starbucks-story;
https://www.core77.com/posts/9896/Ethiopia-brands-its-coffees;
https://www.marketingweek.com/ethiopia-creates-quality-coffee-brands/

Appendix

Population of the BRICS countries, 2018-2025, million people

Country	2018	2019	2020	2021	2022	2023	2024*	2025*
India	1,369.0	1,383.1	1,396.4	1,407.6	1,417.2	1,428.6	1,441.7	1,454.6
China	1,405.4	1,410.1	1,412.1	1,412.6	1,411.8	1,411.4	1,410.8	1,409.8
Brazil	199.1	200.0	201.0	202.0	203.1	204.2	205.4	206.5
Russia	146.8	146.8	146.5	145.9	146.7	146.3	142.9	142.6
Egypt	97.1	98.1	100.6	102.1	103.6	105.7	107.8	109.9
Ethiopia	95.5	97.6	99.7	101.9	104.1	105.7	107.4	109.1
Iran	82.1	83.1	84.0	84.8	85.7	86.5	87.4	88.3
South Africa	57.9	58.8	59.6	60.1	60.6	61.5	62.5	63.4
Saudi Arabia	30.2	30.1	31.6	30.8	32.2	32.8	33.5	34.1
UAE	9.4	9.5	9.3	9.6	9.6	9.7	9.8	9.9
Total	**3,492.5**	**3,517.1**	**3,540.7**	**3,557.4**	**3,574.5**	**3,592.6**	**3,609.1**	**3,628.3**

Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

Urbanization level of the BRICS countries, 2010-2022, %

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Brazil	84.3	84.6	84.9	85.2	85.5	85.8	86.0	86.3	86.6	86.8	87.1	87.3	87.6
UAE	84.1	84.4	84.7	85.1	85.4	85.7	86.0	86.2	86.5	86.8	87.0	87.3	87.5
Saudi Arabia	82.1	82.3	82.5	82.7	83.0	83.2	83.4	83.6	83.8	84.1	84.3	84.5	84.7
Iran	70.6	71.2	71.8	72.3	72.8	73.4	73.9	74.4	74.9	75.4	75.9	76.3	76.8
Russia	73.7	73.7	73.8	73.9	74.0	74.1	74.2	74.3	74.4	74.6	74.8	74.9	75.1
South Africa	62.2	62.7	63.3	63.8	64.3	64.8	65.3	65.9	66.4	66.9	67.4	67.8	68.3
China	49.2	50.5	51.8	53.0	54.3	55.5	56.7	58.0	59.2	60.3	61.4	62.5	63.6
Egypt	43.0	43.0	42.9	42.9	42.8	42.8	42.7	42.7	42.7	42.7	42.8	42.9	43.0
India	30.9	31.3	31.6	32.0	32.4	32.8	33.2	33.6	34.0	34.5	34.9	35.4	35.9
Ethiopia	17.3	17.7	18.2	18.6	19.0	19.4	19.9	20.3	20.8	21.2	21.7	22.2	22.7

Source: World Bank

GDP in current prices of the BRICS countries, 2015-2025, billion US dollars

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	2025*
China	11,113	11,227	12,265	13,842	14,341	14,863	17,759	17,848	17,662	18,533	19,790
India	2,104	2,295	2,651	2,703	2,836	2,675	3,167	3,353	3,572	3,937	4,340
Brazil	1,800	1,797	2,063	1,917	1,873	1,476	1,671	1,952	2,174	2,331	2,438
Russia	1,357	1,281	1,575	1,653	1,696	1,488	1,843	2,272	1,997	2,057	2,090
Saudi Arabia	669	666	715	847	839	734	874	1,109	1,068	1,106	1,171
UAE	370	369	390	427	418	349	415	507	504	528	550
Iran	408	458	487	334	242	195	289	347	403	464	486
Egypt	350	351	247	263	318	382	423	475	394	348	329
South Africa	347	323	381	405	389	338	420	405	378	373	385
Ethiopia	63	72	77	80	93	97	99	119	160	205	236

Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

GDP by PPP in current prices of the BRICS countries, 2015-2025, billion international dollars

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	2025*
China	17,880	18,702	19,814	21,636	23,309	24,146	27,387	30,191	32,931	35,291	37,381
India	7,160	7,735	8,277	9,013	9,519	9,088	10,425	11,939	13,343	14,595	15,811
Russia	3,526	3,539	3,819	4,016	4,173	4,116	4,562	4,825	5,180	5,473	5,670
Brazil	3,015	2,939	3,019	3,143	3,235	3,170	3,473	3,830	4,085	4,274	4,441
Saudi Arabia	1,578	1,524	1,626	1,716	1,764	1,724	1,894	2,179	2,242	2,354	2,539
Egypt	1,122	1,117	1,119	1,206	1,294	1,358	1,467	1,674	1,800	1,899	2,018
Iran	1,131	1,221	1,281	1,287	1,268	1,328	1,454	1,615	1,753	1,855	1,945
South Africa	759	773	790	821	837	797	873	952	993	1,026	1,057
UAE	622	619	646	669	688	662	723	834	894	948	1,005
Ethiopia	167	195	215	237	263	282	314	357	397	432	468
Total	**36,960**	**38,363**	**40,606**	**43,744**	**46,349**	**46,671**	**52,572**	**58,398**	**63,618**	**68,146**	**72,335**

Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

Real GDP growth of the BRICS countries, 2015-2025, %

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	2025*
Brazil	-3.5	-3.3	1.3	1.8	1.2	-3.3	4.8	3.0	2.9	2.2	2.1
Egypt	4.4	4.3	4.2	5.3	5.5	3.6	3.3	6.7	3.8	3.0	4.4
India	8.0	8.3	6.8	6.5	3.9	-5.8	9.7	7.0	7.8	6.8	6.5
Iran	-1.4	8.8	2.8	-1.8	-3.1	3.3	4.7	3.8	4.7	3.3	3.1
China	7.0	6.9	6.9	6.8	6.0	2.2	8.4	3.0	5.2	4.6	4.1
UAE	6.8	5.6	0.7	1.3	1.1	-5.0	4.4	7.9	3.4	3.5	4.2
Russia	-2.0	0.2	1.8	2.8	2.2	-2.7	6.0	-1.2	3.6	3.2	1.8
Saudi Arabia	4.5	1.9	0.9	3.2	1.1	-3.6	5.1	7.5	-0.8	2.6	6.0
Ethiopia	10.4	8.0	10.2	7.7	9.0	6.1	6.3	6.4	7.2	6.2	6.5
South Africa	1.3	0.7	1.2	1.6	0.3	-6.0	4.7	1.9	0.6	0.9	1.2

Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

GDP by PPP per capita of the BRICS countries, 2015-2025, thousand international dollars

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	2025*
UAE	69.5	67.9	69.4	71.4	72.4	71.3	75.6	86.6	92.1	96.8	101.9
Saudi Arabia	52.9	49.2	52.5	56.8	58.7	54.6	61.5	67.7	68.3	70.3	74.4
Russia	24.1	24.1	26.0	27.4	28.4	28.1	31.3	32.9	35.4	38.3	39.8
China	12.9	13.4	14.2	15.4	16.5	17.1	19.4	21.4	23.3	25.0	26.5
Iran	14.3	15.3	15.8	15.7	15.3	15.8	17.1	18.8	20.3	21.2	22.0
Brazil	15.4	14.9	15.2	15.8	16.2	15.8	17.2	18.9	20.0	20.8	21.5
Egypt	12.6	12.3	11.8	12.4	13.2	13.5	14.4	16.2	17.0	17.6	18.4
South Africa	13.7	13.7	13.8	14.2	14.2	13.4	14.5	15.7	16.1	16.4	16.7
India	5.4	5.8	6.1	6.6	6.9	6.5	7.4	8.4	9.3	10.1	10.9
Ethiopia	1.9	2.1	2.3	2.5	2.7	2.8	3.1	3.4	3.8	4.0	4.3

Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

Inflation dynamics of the BRICS countries, 2015-2025, %

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	2025*
Brazil	9.0	8.7	3.4	3.7	3.7	3.2	8.3	9.3	4.6	4.1	3.0
Egypt	11.0	10.2	23.5	20.9	13.9	5.7	4.5	8.5	24.4	32.5	25.7
India	4.9	4.5	3.6	3.4	4.8	6.2	5.5	6.7	5.4	4.6	4.2
Iran	11.9	9.1	9.6	30.2	34.7	36.4	40.2	45.8	41.5	37.5	32.5
China	1.4	2.0	1.6	2.1	2.9	2.5	0.9	2.0	0.2	1.0	2.0
UAE	4.1	1.6	2.0	3.1	-1.9	-2.1	-0.1	4.8	1.6	2.1	2.0
Russia	15.5	7.0	3.7	2.9	4.5	3.4	6.7	13.7	5.9	6.9	4.5
Saudi Arabia	1.2	2.1	-0.8	2.5	-2.1	3.4	3.1	2.5	2.3	2.3	2.0
Ethiopia	9.6	6.6	10.7	13.8	15.8	20.4	26.8	33.9	30.2	25.6	18.2
South Africa	4.6	6.3	5.3	4.6	4.1	3.3	4.6	6.9	5.9	4.9	4.5

Source: IMF

*Note. *forecast, IMF data as of April 16, 2024.*

GNI dynamics of the BRICS countries per capita, 2010-2022, thousand US dollars

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
UAE	34.1	37.1	41.8	45.9	47.4	46.3	44.5	42.1	44.4	46.2	41.6	43.6	49.2
Saudi Arabia	17.5	19.8	22.9	24.5	24.9	23.4	21.6	20.1	21.9	23.2	22.4	24.0	27.7
China	4.3	5.0	5.9	6.7	7.5	7.9	8.2	8.7	9.5	10.3	10.5	12.0	12.9
Russia	10.0	11.1	13.5	15.2	14.6	11.8	9.7	9.2	10.3	11.3	10.8	11.8	12.8
Brazil	9.6	11.0	12.3	12.8	12.1	10.2	8.9	8.7	9.1	9.2	7.9	7.9	8.1
South Africa	6.8	7.7	8.3	8.1	7.3	6.6	6.0	6.0	6.4	6.7	6.1	6.5	6.8
Egypt	2.3	2.4	2.7	2.9	3.1	3.2	3.3	2.9	2.8	2.7	3.0	3.5	4.1
Iran	6.1	6.9	7.5	7.3	6.7	5.5	5.5	5.5	4.9	4.0	3.3	3.5	4.0
India	1.2	1.4	1.5	1.5	1.6	1.6	1.7	1.8	2.0	2.1	1.9	2.2	2.4
Ethiopia	0.4	0.4	0.4	0.5	0.5	0.6	0.7	0.7	0.8	0.8	0.9	0.9	1.0

Source: World Bank

Agro-industrial complex share in the structure of GDP of the BRICS countries, %

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Ethiopia	41.4	41.2	44.3	41.2	38.5	36.1	34.7	33.8	31.2	33.6	35.6	37.6	37.6
India	17.0	17.2	16.8	17.1	16.8	16.2	16.4	16.6	16.0	16.8	18.6	17.3	16.7
Iran	6.5	4.6	6.8	8.8	9.4	10.1	9.8	9.8	11.1	13.3	12.2	12.4	12.8
Egypt	13.3	13.9	11.3	11.3	11.3	11.4	11.8	11.0	10.8	10.7	11.2	11.4	10.9
China	9.3	9.2	9.1	8.9	8.6	8.4	8.1	7.5	7.0	7.1	7.7	7.2	7.3
Brazil	4.1	4.3	4.2	4.5	4.3	4.3	4.9	4.6	4.4	4.2	5.7	7.5	6.8
Russia	3.3	3.2	2.9	3.0	3.4	3.9	3.8	3.6	3.4	3.5	4.0	3.9	3.9
South Africa	2.1	2.0	2.0	1.9	2.1	2.2	2.4	2.5	2.3	2.0	2.6	2.6	2.8
Saudi Arabia	2.6	2.2	2.1	2.2	2.3	2.8	2.9	2.9	2.5	2.6	3.0	2.7	2.4
UAE	0.7	0.7	0.6	0.6	0.6	0.7	0.8	0.8	0.7	0.7	1.0	0.9	0.8

Source: World Bank

Share of population employed in agriculture of the BRICS countries, %

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Ethiopia	73.8	72.7	72.1	71.0	70.1	69.0	68.2	67.1	66.3	65.3	64.6	63.5	62.8
India	51.1	49.1	47.1	46.2	45.2	44.3	43.2	42.3	41.3	40.7	44.7	44.1	42.9
China	36.7	34.8	33.6	31.4	29.5	28.3	27.4	26.7	25.8	24.7	23.6	23.2	22.6
South Africa	16.6	17.6	16.1	15.4	14.0	15.4	16.0	16.8	15.7	16.4	21.4	21.3	19.3
Egypt	28.3	29.2	27.1	28.0	27.5	25.8	25.6	25.1	21.7	21.2	20.4	19.3	18.7
Iran	18.1	17.5	18.4	17.1	16.9	17.1	16.7	16.6	16.7	17.0	16.7	15.5	15.1
Brazil	11.5	10.8	9.8	10.0	9.3	9.3	9.8	9.2	9.1	8.9	9.3	9.5	8.7
Russia	7.7	7.7	7.3	7.0	6.7	6.7	6.7	5.9	5.9	5.8	6.0	5.9	5.7
Saudi Arabia	6.4	6.3	6.2	6.1	6.0	5.9	4.6	3.9	3.1	3.5	3.2	2.7	2.9
UAE	3.6	3.3	3.0	2.7	2.4	2.1	1.8	1.6	1.5	2.2	1.8	1.4	1.4

Source: World Bank

Final consumption expenditures in the BRICS countries per capita in constant prices 2023, 2018-2028, US dollars

Country	2018	2019	2020	2021	2022	2023	2024*	2025*	2026*	2027*	2028*
UAE	19,223	19,819	20,973	21,397	25,823	26,951	27,737	28,219	28,992	29,844	30,640
Saudi Arabia	12,036	13,162	11,168	12,597	12,703	13,390	13,917	14,089	14,294	14,541	14,814
Russia	5,646	5,830	5,621	6,349	6,207	6,511	6,307	6,387	6,503	6,610	6,725
Brazil	5,590	5,711	5,569	5,905	6,136	6,223	6,133	6,227	6,342	6,453	6,573
China	3,556	3,838	3,866	4,381	4,551	4,819	5,071	5,385	5,769	6,158	6,550
South Africa	4,110	4,079	3,766	3,917	3,988	3,997	4,013	4,034	4,078	4,127	4,174
Egypt	2,496	2,626	2,755	2,898	2,812	2,661	2,789	2,942	3,149	3,404	3,667
India	1,305	1,361	1,247	1,386	1,471	1,554	1,612	1,699	1,787	1,888	1,991
Iran	1,182	1,206	1,293	1,366	1,534	1,463	1,431	1,457	1,496	1,530	1,564
Ethiopia	769	820	826	850	934	958	958	961	994	1,030	1,073

Source: Euromonitor International (Passport platform)
*Note. *forecast.*

Grain production of the BRICS countries, million tons

Country	2018	2019	2020	2021	2022
China	609.9	613.4	616.6	632.6	633.3
India	259.6	263.2	274.5	285.3	289.1
Russia	109.8	117.9	130.0	117.6	153.0
Brazil	103.3	121.2	125.6	112.0	135.5
Ethiopia	28.4	29.7	30.2	30.6	30.4
Egypt	17.6	21.9	22.5	23.1	23.9
South Africa	15.6	13.9	18.8	19.9	18.7
Iran	18.7	22.0	15.6	14.8	14.8
Saudi Arabia	1.4	1.3	1.3	0.9	1.1
UAE	0.01	0.03	0.03	0.02	0.02
Total	**1,164.2**	**1,204.5**	**1,235.1**	**1,236.8**	**1,299.7**

Source: FAOSTAT , BRICS Joint Statistical Publication , national statistical agencies

Meat production of the BRICS countries, million tons

Country	2018	2019	2020	2021	2022
China	86.2	77.6	77.5	89.9	93.3
Brazil	23.5	24.0	24.3	25.0	26.1
Russia	10.6	10.9	11.2	11.3	11.7
India	8.1	8.6	8.8	9.3	9.7
South Africa	3.8	3.9	4.0	4.1	4.1
Egypt	2.4	2.4	2.9	3.3	3.4
Iran	2.8	2.7	2.9	2.7	2.7
Saudi Arabia	0.9	1.1	1.2	1.2	1.4
Ethiopia	0.8	0.9	0.9	0.8	0.8
UAE	0.2	0.2	0.2	0.2	0.2
Total	**139.3**	**132.2**	**133.9**	**147.9**	**153.4**

Source: FAOSTAT , BRICS Joint Statistical Publication , national statistical agencies

Milk production of the BRICS countries, million tons

Country	2018	2019	2020	2021	2022
India	187.8	198.4	210.0	221.1	213.8
China	31.8	33.0	35.3	37.8	40.3
Brazil	32.9	33.9	34.3	34.2	33.6
Russia	30.6	31.4	32.2	32.3	33.0
Iran	7.5	7.5	8.4	8.8	8.3
Egypt	5.2	5.3	5.6	6.2	5.7
Ethiopia	3.7	4.2	5.1	4.2	4.5
South Africa	3.8	3.9	3.8	3.8	3.7
Saudi Arabia	2.4	2.7	2.9	2.9	2.8
UAE	0.2	0.2	0.3	0.2	0.2
Total	**305.8**	**320.5**	**337.8**	**351.5**	**346.0**

Source: FAOSTAT , BRICS Joint Statistical Publication , national statistical agencies

Fish and seafood production of the BRICS countries, million tons

Country	2018	2019	2020	2021	2022
China	81.0	82.6	83.9	85.9	87.5
India	12.6	13.6	14.2	14.7	16.2
Russia	5.3	5.3	5.3	5.4	5.3
Egypt	2.0	2.0	2.0	2.0	2.1
Brazil	1.3	1.3	1.4	1.4	1.4
Iran	1.3	1.3	1.3	1.3	1.3
South Africa	0.6	0.5	0.6	0.5	0.5
Saudi Arabia	0.1	0.1	0.2	0.2	0.2
UAE	0.07	0.07	0.06	0.06	0.06
Ethiopia	0.06	0.06	0.06	0.06	0.06
Total	**104.3**	**106.8**	**109.0**	**111.5**	**114.6**

Source: FAOSTAT , BRICS Joint Statistical Publication , national statistical agencies

Import of agricultural products of the BRICS countries in value terms, 2018-2023, billion US dollars

Country	2018	2019	2020	2021	2022	2023
China	126.3	140.2	162.3	209.0	224.0	223.8
Russia	30.1	30.3	30.5	35.0	36.8	36.0
India	19.7	19.4	20.6	28.9	34.4	31.7
Saudi Arabia	19.8	20.1	20.8	23.3	29.9	N/A
UAE	18.1	18.2	17.1	18.8	23.8	N/A
Iran	10.6	12.5	10.6	16.5	17.4	N/A
Egypt	13.8	14.7	12.3	12.5	16.5	18.1
Brazil	11.1	10.9	10.8	12.6	13.9	13.3
South Africa	6.8	6.6	6.0	7.0	7.4	7.1
Ethiopia	2.1	1.9	2.6	4.3	4.0	N/A
Total	**258.6**	**274.8**	**293.6**	**368.0**	**408.0**	**330.0**

Source: ITC Trade Map, UN Comtrade

Import of agricultural products of the BRICS countries within the framework of the association in value terms, 2018-2023, billion US dollars

Country	2018	2019	2020	2021	2022	2023
China	37.9	36.2	42.4	54.0	62.8	71.8
Saudi Arabia	6.6	6.5	6.6	7.3	10.1	N/A
Iran	3.9	5.0	4.0	7.7	9.4	N/A
UAE	6.2	6.1	5.6	6.3	8.0	N/A
Russia	5.2	5.1	5.1	5.7	7.1	7.5
Egypt	5.4	5.4	4.4	3.3	5.6	6.5
India	2.2	1.7	2.5	2.7	4.8	5.8
Ethiopia	0.7	0.6	0.8	1.6	1.4	N/A
South Africa	1.2	1.0	1.1	1.0	1.1	1.3
Brazil	0.6	0.6	0.7	0.6	0.7	0.9
Total	**69.9**	**68.3**	**73.3**	**90.3**	**111.0**	**93.7**

Source: ITC Trade Map, UN Comtrade

Import of agricultural products of the BRICS countries from other countries in value terms, 2018 -2023, billion US dollars

Country	2018	2019	2020	2021	2022	2023
China	88.5	104.1	119.9	155.0	161.2	152.1
India	17.5	17.6	18.1	26.2	29.6	25.9
Russia	24.9	25.2	25.3	29.3	29.7	28.6
Saudi Arabia	13.3	13.6	14.1	16.1	19.8	N/A
UAE	12.0	12.0	11.6	12.6	15.8	N/A
Brazil	10.4	10.3	10.1	11.9	13.2	12.4
Egypt	8.5	9.3	8.0	9.2	10.8	11.6
Iran	6.7	7.6	6.5	8.8	8.0	N/A
South Africa	5.6	5.6	4.9	5.9	6.3	5.8
Ethiopia	1.4	1.3	1.8	2.7	2.6	N/A
Total	**188.7**	**206.6**	**220.2**	**277.7**	**297.0**	**236.4**

Source: ITC Trade Map, UN Comtrade

Export of agricultural products of the BRICS countries in value terms, 2018-2023, billion US dollars

Country	2018	2019	2020	2021	2022	2023
Brazil	82.6	78.2	83.5	99.8	135.2	145.8
China	77.5	77.0	74.5	82.5	95.8	96.8
India	35.3	34.8	36.3	46.0	51.8	48.6
Russia	25.8	25.4	30.2	36.7	41.9	43.5
UAE	12.6	13.5	13.5	15.1	18.3	N/A
South Africa	10.7	9.9	10.3	12.4	13.0	13.3
Egypt	4.8	5.2	5.0	6.0	6.6	8.4
Iran	6.3	5.8	6.2	5.3	4.9	N/A
Saudi Arabia	3.7	3.7	3.6	4.2	4.8	N/A
Ethiopia	2.2	2.2	2.2	2.7	2.8	N/A
Total	**261.5**	**255.8**	**265.3**	**310.7**	**375.1**	**356.4**

Source: ITC Trade Map, UN Comtrade

Export of agricultural products of the BRICS countries within the framework of the association in value terms, 2018-2023, billion US dollars

Country	2018	2019	2020	2021	2022	2023
Brazil	40.1	34.9	37.0	45.7	61.8	67.7
Russia	6.5	6.8	8.6	9.2	12.9	15.2
India	7.6	9.7	8.8	10.0	11.9	11.1
China	4.3	4.3	3.6	3.9	5.1	5.7
UAE	3.8	4.3	3.7	4.3	5.0	N/A
Egypt	1.4	1.3	1.4	1.4	1.8	1.9
South Africa	1.2	1.2	1.2	1.7	1.5	1.7
Iran	0.9	1.3	1.8	1.5	1.3	N/A
Saudi Arabia	1.1	1.1	0.9	1.1	1.3	N/A
Ethiopia	0.5	0.5	0.5	0.6	0.7	N/A
Total	**67.1**	**65.4**	**67.5**	**79.3**	**103.4**	**103.2**

Source: ITC Trade Map, UN Comtrade

Export of agricultural products of the BRICS countries to other countries in value terms, 2018–2023, billion US dollars

Country	2018	2019	2020	2021	2022	2023
China	73.3	72.6	70.9	78.6	90.7	91.2
Brazil	42.5	43.3	46.5	54.1	73.3	78.1
India	27.7	25.2	27.4	36.1	39.9	37.5
Russia	19.3	18.6	21.6	27.5	29.1	28.4
UAE	8.8	9.2	9.8	10.8	13.3	N/A
South Africa	9.5	8.8	9.1	10.7	11.4	11.6
Egypt	3.5	3.9	3.6	4.7	4.8	6.5
Iran	5.4	4.5	4.4	3.7	3.6	N/A
Saudi Arabia	2.6	2.6	2.7	3.1	3.6	N/A
Ethiopia	1.7	1.7	1.7	2.2	2.1	N/A
Total	**194.2**	**190.3**	**197.9**	**231.5**	**271.9**	**253.3**

Source: ITC Trade Map, UN Comtrade

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