MINISTRY OF FOOD PROCESSING INDUSTRIES
GOVERNMENT OF INDIA

Country Profile – Russia

Food Processing Sector

Contents

Preface

This Country Profile on the Russian Federation has been developed by the Ministry of Food Processing Industries (MoFPI), Government of India, as part of the World Food India 2025 (WFI 2025) initiative. Russia is the “Focus Country in WFI 2025. It is intended to serve as a comprehensive reference document for policymakers, industry stakeholders, trade facilitators, and investors seeking to understand the structure, dynamics, and emerging opportunities within Russia’s food processing sector.

The report provides a detailed assessment of Russia’s macroeconomic environment, agricultural output, and food industry landscape, underpinned by the latest available data. It highlights key growth drivers such as increasing urbanisation, changing consumption patterns, rising demand for convenience and health foods, and favourable trade policies. In addition, it outlines Russia’s major sub-sectors—including meat and poultry, dairy, bakery and confectionery, alcoholic beverages, and functional foods—alongside trends in technology adoption, supply chain integration, and retail evolution.

Of particular importance is the section on bilateral trade between India and Russia, which maps current export-import flows, identifies potential product categories for collaboration, and suggests priority areas for investment and joint ventures. The document further outlines actionable avenues for cooperation—ranging from integrated cold chain development and food park investments to academic exchange programmes and harmonisation of food standards.

This profile is part of MoFPI’s ongoing efforts to support informed decision-making and catalyse international engagement in the Indian food processing ecosystem. We hope it contributes to strengthening India-Russia cooperation and facilitates greater participation by stakeholders in shaping resilient, innovative, and mutually beneficial food value chains.

Overview of the Global Food Processing Sector

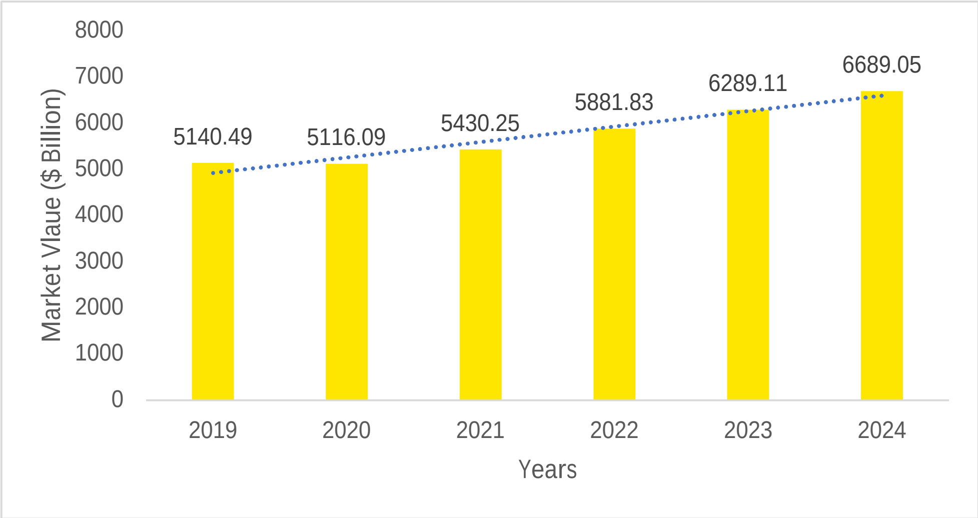
The food processing sector plays a pivotal role in transforming raw agricultural produce into value-added food products that are safe, nutritious, and suitable for consumption. This sector encompasses a wide range of activities, including harvesting, sorting, cleaning, packaging, preservation, and distribution. Advanced technologies and techniques—such as grinding, cooking, pasteurization, canning, freezing, and dehydration—are employed to enhance the quality, safety, and shelf life of food products. These processes often rely on specialized machinery, additives, and ingredients to optimize outcomes and meet consumer expectations.
The sector is essential in addressing global demand for diverse, convenient, and high-quality food products. It enables year-round availability of seasonal produce and facilitates the development of a wide array of food categories, including fruits and vegetables, grains, dairy, meat, poultry, seafood, baked goods, beverages, and ready-to-eat meals. Food processing enterprises range from small-scale units to large multinational corporations, all of which must adhere to strict international standards of food safety and quality control.

In 2024, the global food and beverages market was valued at USD 6,689.0 billion, representing a per capita consumption value of approximately USD 839.6. The sector contributed significantly to the global economy, accounting for 6.12% of the total global GDP.[1]

Among its segments, the meat, poultry, and seafood category held the largest share at 23.2%, followed by the bakery and confectionery segment at 13.6%, and the dairy segment at 12.3%. These figures reflect strong global demand and sustained growth across key categories within the food processing industry.[2]

[1] https://globalmarketmodel.com/DocViewer.aspx?id=165159
[2] Ibid

Figure 1: Global Food & Beverages Market, Historic Market Size, 2019-2024, $ Billion



- The global food and beverages market grew from US $5140.49 Bn in 2019 to US $6689.05 Bn in 2024[3]
- The market grew at a compound annual growth rate (CAGR) of 5.41% [4]

Emerging Trends[5]

The food and beverages market are being shaped by several significant trends, including:

- Growing popularity of functional drinks for hydration and nutritional benefits
- Increasing demand for micro-distilled and artisan spirits
- Expansion of the alcohol e-commerce market
- Adoption of high-pressure pasteurization for fruits and vegetables
- Rising consumer preference for clean label products
- Advancements in Individual Quick Freezing (IQF) technology
- Integration of robotics and automation in meat processing
- Premiumization of pet food offerings

[3] Ibid
[4] Ibid
[5] Ibid

Russia: Country Overview

Russia, the largest country in the world by land area, spans Eastern Europe and Northern Asia, offering a unique blend of geographic diversity, cultural heritage, and geopolitical significance. Renowned for its historical legacy as the core of the former Soviet Union, Russia is a global powerhouse rich in natural resources, scientific innovation, and artistic achievement. From the imperial architecture of Moscow and Saint Petersburg to the vast landscapes of Siberia, the nation reflects a deep-rooted cultural tradition alongside rapid modernization. As a key global actor, Russia holds a permanent seat on the United Nations Security Council and plays a pivotal role in global energy, defence, and diplomatic affairs. The following table presents key facts about Russia:

Russia - Key Facts	
Capital	Moscow
Area	16,377,742 sq km[6]
Population (2024)	143.53 million[7]
Currency	Russian Ruble
Languages	Major language: Russian Minority languages: Ossetic, Ukrainian, Buryat, Kalmyk, Chechen, Ingush, Abaza, Adyghe, Cherkess, Kabardian, Altai, Bashkir, Chuvash, etc.
Life Expectancy	73 years (2023)[8]
Global Population Rank	9th in world
Urban – Rural Population (2023)[9]	Urban: 75.33%; Rural: 24.67%

Russia Economy Overview

As of 2024, the Russian Federation's nominal GDP is estimated at approximately USD 2.17 trillion.[10] The economy demonstrated robust performance, recording a growth rate of around 4.3% for the year. Despite ongoing geopolitical challenges and the continued impact of international sanctions, Russia's economic fundamentals have remained resilient.

In 2023, Russia's Gross National Income (GNI) per capita rose to USD 14,250, leading to its reclassification as a high-income economy.[11] The labour market remained tight, with the national unemployment rate staying at a low level of approximately 2.2% in 2024. This labour market strength contributed to a significant rise in real wages, which increased by an estimated 13.2% over the same period.[12]

Russia's fiscal and external balances remain stable. The federal fiscal deficit is projected to be around 1.6% of GDP in 2024, while the current account surplus is estimated at approximately 2.5% of GDP. The trade surplus remains strong, accounting for roughly 6.1% of GDP.[13]

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[6] https://statisticstimes.com/geography/countries-by-area.php

[7] https://data.worldbank.org/country/russian-federation

[8] Ibid

[9] Russia Rural population, percent - data, chart | TheGlobalEconomy.com

[10] GDP (current US$) - Russian Federation | Data

[11] https://www.worldbank.org/en/about/leadership/directors/eds23/brief/russia-was-classified-as-high-income-country?utm_source=chatgpt.com

[12] https://thedocs.worldbank.org/en/doc/d5f32ef28464d01f195827b7e020a3e8-0500022021/related/mpo-rus.pdf?utm_source=chatgpt.com

[13] https://thedocs.worldbank.org/en/doc/d5f32ef28464d01f195827b7e020a3e8-0500022021/related/mpo-rus.pdf?utm_source=chatgpt.com

Energy exports continue to be a cornerstone of the Russian economy. Oil, natural gas, coal, and refined petroleum products together constitute nearly 50% of the country's total exports and contribute approximately 14% to its GDP.[14]

Some of the key facts of Russia economy is listed below

Russia - Economy Key Facts[15]	
Gross Domestic Product per capita (current USD) (as of 2024)	USD 14,889.00
GDP (current USD)	USD 2.17 trillion (2024)
Total Final Consumption Expenditure (% of GDP)	68.3 % (2023)
Household Saving ratio	31% (2024)
CPI Inflation	6.7 % (2021)
GDP Growth (Annual %)	4.3% (2024)

Russia's: Agriculture Market 2024

Russian agriculture is a significant pillar of the national economy, contributing substantially to net production, employment, and capital investment. The sector is characterized by a complex network of interrelated industries, including food processing, agricultural machinery, input supply, and infrastructure. Despite facing challenges such as labour shortages and the impact of international events, agriculture remains vital for ensuring national food security and supporting export growth.

Russia possesses approximately 222 million hectares of arable land. However, the soil quality is varied and often less than ideal for agriculture, with a mix of acidic, saline, and alkaline compositions. Around 54 million hectares are affected by wind or water erosion, an additional 25 million hectares are waterlogged or swampy, and more than 10 million hectares suffer from significant industrial pollution. The total planted area is approximately 88 million hectares, while forests cover about 44% of the Russian Federation's total land area.[16]

Despite these adverse conditions, agriculture continues to play a crucial role in Russia's economy, contributing around 25% to net production output, employment, and capital investment. The country's main food crops include wheat, barley, maize, rye, oats, potatoes, millet, buckwheat, rice, and pulses. A key segment of Russia's agro-industrial complex is forage production, which not only supports the development of the livestock industry but also influences the overall performance of the agricultural sector. Notably, over 70% of the gross grain harvest is used to feed poultry and livestock.[17]

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[14] 2022-04-15-russian-economy-and-world-trade-in-energy.pdf
[15] https://data.worldbank.org/country/russian-federation
[16]https://www.fao.org/4/y2722e/y2722e11.htm#:~:text=Despite%20these%20adverse%20conditions%2C%20agriculture,for%20feeding%20poultry%20and%20livestock.
[17] Ibid

Grain

In the 2024–25 season, Russian agricultural production data indicates that the total grain harvest amounted to 124.9 million tonnes, representing a 14% year-on-year (YoY) decline (approximately 20 million tonnes) compared to the previous season. The gross wheat harvest fell by 11% (-11.5 million tonnes), while barley production also declined by 21% YoY. Corn production saw a reduction of 4.4 million tonnes, totalling 13.2 million tonnes.
The decrease in crop yields was driven by two simultaneous factors. Spring and summer droughts in central and southern regions reduced yields by approximately 9% YoY, while cost-optimization strategies among agricultural producers led to a reduction in the area under cultivation.

Oilseeds

Russia's overall oilseed crop production for the 2024–25 season was 28.3 million tonnes, remaining broadly in line with the 2023–24 season. The oilseed structure saw a slight increase of 0.2 million tonnes in soybean output and an additional 0.8 million tonnes from other oilseeds, which offset a 0.7 million tonne decline in sunflower production.

Sugar Beet

The sugar beet harvest for the 2024–25 season totalled 41.9 million tonnes; a 21% decline (-11.2 million tonnes) compared to the previous year. However, this decrease in yield was partially mitigated by a 10% YoY increase in the cultivated area, driven by improved conditions in the domestic sugar market.[18]

Agricultural Import & Export

Exports

In 2024, Russia's exports of major crops totaled 93.1 million tonnes, representing a 23% decline (-27.7 million tonnes) compared to 2023. Wheat and barley shipments fell by 21% (-19.5 million tonnes) and 23% (-2.7 million tonnes) respectively, with wheat accounting for most export volumes.

Grain export volumes declined by 22% (-26 million tonnes), largely due to reduced crop yields caused by adverse weather conditions across several regions. Additional pressure on export volumes came from logistical constraints and moderate carry-over stocks.

Soybean and sunflower seed exports hit a five-year low, plummeting by 84% year-on-year to just 0.3 million tonnes. This sharp decline was attributed to a reduction in the cultivated area and abnormal weather conditions, both of which negatively impacted oilseed production. Furthermore, export duties on sunflower and soybean seeds remained in place in 2024, further limiting oilseed export growth.

[18] https://ar2024.rusagrogroup.ru/en/performance-overview/agriculture-business#export-import

Importers of Russian Grain
While the distribution of top Russian grain importers shifted in 2024, the overall list of key buyers remained largely unchanged.

- Egypt topped the list, increasing its grain imports from Russia by 10% YoY to 16.3 million tonnes, representing 17% of total Russian grain exports.
- Turkey, previously the largest buyer in 2023, saw its share fall to 12%, an 8-percentage point drop, following a two-fold decline in import volumes from Russia.
- Bangladesh expanded its share from 4% to 6%, reflecting growing import demand.

Imports

In 2024, soybeans remained the primary inbound oilseed crop, with 1.4 million tonnes imported into Russia, down 1% YoY (-20 thousand tonnes). Overall, there was no significant change in the total volume of grain and oilseed imports into Russia during the year.[19]

Russia: Food Processing Sector Overview

The Russian food processing industry continues to expand, supported by robust government initiatives aimed at strengthening domestic agricultural production and achieving the ambitious national target of increasing food exports by 70% by 2024, reaching USD 45 billion. Although ongoing economic sanctions and a weakening Ruble have dampened demand for imported products, the industry is undergoing significant modernization to better cater to domestic consumers and an increasing number of strategic international partners. Within this evolving landscape, there are promising niche opportunities for exporting high-quality, value-added ingredients.[20]

In 2025, revenue in Russia's food market is projected to reach USD 289.24 billion. The market is expected to grow at a compound annual growth rate (CAGR) of 5.98% from 2025 to 2030. The largest segment within the market is meat, with a projected market volume of USD 57.41 billion in 2025.

Online sales are expected to contribute 1.4% of total revenue in the food market by 2025. Additionally, total food volume consumption is projected to reach approximately 65.13 billion kilograms by 2025.[21]

Food Production Trends

Russia was the largest country in the Eastern Europe food and beverages market in 2024, accounting for USD 97.00 billion. Its food and beverages market had the third highest CAGR in Eastern Europe of 7.54% during 2019-2024; and is expected to grow at a CAGR of 4.28% during 2024-2029.[22]

[19] Ibid
[20] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients_Moscow%20ATO_Russian%20Federation_03-30-2020
[21] https://www.statista.com/outlook/cmo/food/russia
[22] https://globalmarketmodel.com/DocViewer.aspx?id=165159

Key growth drivers

Population and Income Growth

Russia’s growing urban population and rising disposable income are key drivers behind the increasing demand for processed and convenience foods. Nationwide consumer spending on food and non-alcoholic beverages is projected to reach USD 1,700 per capita in 2025, reflecting enhanced purchasing power among Russians consumers[23]. The convenience food market in Russia is also experiencing strong growth, expected to generate USD 12.56 billion in 2025, with a projected annual growth rate of 5.5% as more consumers opt for quick, ready-to-eat meals[24]. Additionally, sustained real income growth, particularly among urban households have fuelled a shift towards premium and healthier food options, further accelerating the expansion of the processed food industry.

Lifestyle Changes

Russia’s increasingly urban and fast-paced lifestyle is driving a significant shift in eating habits, with consumers frequently turning to ready-to-eat and convenience foods to save time. Fuelled by dual-income households and busy schedules, the convenience food market in Russia is projected to reach USD 12.56 billion in 2025, growing at a compound annual growth rate (CAGR) of 5.5%[25]. Ready-to-eat meals alone are expected to generate USD 11.06 billion in 2025, with projected annual growth of 5.1% through 2030[26]. Urban consumers are also increasingly dependent on food delivery platforms, with the meal delivery market expected to reach €2.87 billion in 2024, growing at nearly 6.6% annually[27]. Together, these trends underscore how rising urbanization and evolving consumer lifestyles are catalysing rapid growth in Russia’s convenience and on-the-go food consumption.

Favourable Trade Agreements

Russia’s trade landscape is significantly strengthened by favourable regional and international trade agreements that reduce tariffs and improve market access for food processors. As a key member of the Eurasian Economic Union (EAEU), Russia benefits from preferential trade arrangements within the bloc, eliminating customs duties with Kazakhstan, Belarus, Armenia, and Kyrgyzstan. Additionally, Russia has expanded its trade relations through free trade agreements (FTAs) with countries such as Iran, Vietnam, China, Serbia, and Singapore, facilitating smoother cross-border movement of food products, agricultural raw materials, and processing equipment.

Russia’s accession to the World Trade Organization (WTO) in 2012 involved binding commitments to lower tariffs on key agricultural categories—including cereals, oilseeds, and dairy—enhancing transparency and reducing trade barriers for both imports and exports[28]. More recently, agreements such as the U.S.-mediated deal to ease sanctions on agricultural

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[23] Consumption Indicators - Russia | Statista Market Forecast
[24] Convenience Food - Russia | Statista Market Forecast
[25] Convenience Food - Russia | Statista Market Forecast
[26] Ready-to-Eat Meals - Russia | Statista Market Forecast
[27] https://es.statista.com/outlook/dmo/online-food-delivery/meal-delivery/russia?utm_source=chatgpt.com
[28] Russian Federation | United States Trade Representative

exports and fertilizers have further alleviated bottlenecks in global food trade. These developments bolster Russia's ability to import essential ingredients and machinery while expanding its processed food exports.

Collectively, these trade frameworks support the growth of Russia's food processing sector by improving access to inputs, advanced technologies, and international markets, ultimately enhancing product quality, efficiency, and diversity.

Key Sub Sector

Russia Meat, Poultry and Seafood Market Overview [29]

- **Meat Products**:
  The Russian meat products market grew from USD 12.02 billion in 2018 to USD 14.59 billion in 2023, reflecting a CAGR of 3.95%. It is projected to grow at a CAGR of 2.71% from 2023, reaching USD 16.68 billion by 2028.
- **Poultry**:
  The poultry market expanded from USD 4.65 billion in 2018 to USD 5.78 billion in 2023, at a CAGR of 4.45%. It is expected to grow at a CAGR of 2.56%, reaching USD 6.56 billion by 2028.
- **Seafood**:
  The seafood market increased from USD 2.06 billion in 2018 to USD 2.58 billion in 2023, growing at a CAGR of 4.6%. It is projected to reach USD 2.96 billion by 2028, growing at a CAGR of 2.79%.
- **Total Market (Meat, Poultry, and Seafood)**:
  Combined, the market grew from USD 18.73 billion in 2018 to USD 22.95 billion in 2023, at a CAGR of 4.15%. It is expected to grow at a CAGR of 2.68%, reaching USD 26.2 billion by 2028.

Domestic Poultry Consumption and Production

In 2021, domestic consumption of chicken meat was forecast at 4.715 million metric tonnes (MMT), unchanged from 2020. The stagnation in consumption was attributed to increased competition from pork, whose consumer prices in 2020 were, on average, 4.5% lower than in the same months of 2019 due to abundant supply.
Chicken accounts for approximately 94% of total poultry meat, followed by turkey (5.8%) and other poultry—ducks, geese, quail (0.2%). In 2019, 20 companies produced 4.383 million MT (live weight) of chicken, accounting for 70.5% of total national chicken meat production. Their market share grew in 2020 and continued to expand in subsequent years.
Four of the five leading producers successfully began exporting to China, strengthening their positions at the top of the broiler production rankings.[30]

[29] https://globalmarketmodel.com/DocViewer.aspx?id=164897
[30] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Poultry%20and%20Products%20Annual_Moscow_Russian%20Federation_08-15-2020

Industry Structure and Integration

Most top-ranked companies are large, vertically integrated enterprises with comprehensive value chains. Their operations typically include:

- Cultivation of grains and oilseeds
- Production of compound feed
- Operation of poultry farms and slaughterhouses
- Distribution of finished products
- Management of cold storage and retail outlets

Notably, 215 out of 240 of Russia's compound feed plants are owned by major meat-producing corporations. The 25 largest plants account for 55% of the country's total compound feed production, which stands at 29.6 million MT.[31]

Export Expansion

With the domestic chicken meat market nearing saturation, Russian producers are increasingly focused on export opportunities. As of the latest available data:

- 40 poultry processing plants and
- 15 cold storage facilities in Russia have been approved for export to China.

The largest poultry exporters include:

- GAP "Resurs"
- Cherkizovo Group
- Miratorg
- Belgrankorm

These companies are leading efforts to access international markets and diversify revenue streams beyond the domestic market.[32]

Russia Bakery and Confectionery Market Overview [33]

The bakery and confectionery sector in Russia have experienced steady growth over the past five years, driven by increasing consumer demand for convenience foods, expanding retail infrastructure, and evolving taste preferences. The market is segmented into four major categories: Sugar and Confectionery Products, Bread and Bakery Products, Cookies, Crackers, Pasta and Tortillas, and Breakfast Cereals.

1. Sugar and Confectionery Products

Sugar and confectionery products represent the largest segment in the Russian bakery and confectionery market. The segment grew from USD 3.83 billion in 2018 to USD 4.81 billion in 2023, registering a Compound Annual Growth Rate (CAGR) of 4.66%. It is projected to continue expanding at a CAGR of 2.9% from 2023, reaching USD 5.55 billion by 2028.

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[31] Ibid
[32] Ibid
[33] https://globalmarketmodel.com/DocViewer.aspx?id=163993

2. Bread and Bakery Products

Bread and bakery products constitute the second-largest segment. The market grew from USD 3.09 billion in 2018 to USD 3.89 billion in 2023, achieving a CAGR of 4.71%. It is expected to grow at a CAGR of 2.73%, reaching USD 4.45 billion by 2028.

3. Cookies, Crackers, Pasta, and Tortillas

This segment grew from USD 2.8 billion in 2018 to USD 3.58 billion in 2023, reflecting a CAGR of 5.04%. It is projected to grow at a CAGR of 2.75% from 2023, reaching USD 4.1 billion by 2028.

4. Breakfast Cereals

Breakfast cereals remain the smallest segment in the bakery and confectionery market. The segment expanded from USD 0.79 billion in 2018 to USD 1.02 billion in 2023, with a CAGR of 5.24%. It is forecasted to grow at a CAGR of 2.61%, reaching USD 1.16 billion by 2028.

5. Overall Market Performance

The overall Russian bakery and confectionery market grew from USD 10.51 billion in 2018 to USD 13.3 billion in 2023, recording a CAGR of 4.82%. The market is expected to continue its upward trajectory, reaching USD 15.26 billion by 2028, with a projected CAGR of 2.79% from 2023 onward.

Russia Alcoholic Beverages Market Overview [34]

The alcoholic beverages market in Russia has witnessed consistent growth over recent years, driven by evolving consumer preferences, increased disposable incomes, and diversification of product offerings. The market grew from USD 6.71 billion in 2018 to USD 8.7 billion in 2023, recording a Compound Annual Growth Rate (CAGR) of 5.33%. It is projected to expand further at a CAGR of 3.07%, reaching USD 10.12 billion by 2028.

1. Beer

Beer is the largest segment within Russia's alcoholic beverages market. The segment expanded from USD 2.64 billion in 2018 to USD 3.45 billion in 2023, at a CAGR of 5.5%. It is expected to grow at a CAGR of 2.9%, reaching USD 3.98 billion by 2028.

2. Wine and Brandy

Wine and brandy constitute the second-largest segment, especially potato based Vodka. The market grew from USD 2.21 billion in 2018 to USD 2.81 billion in 2023, reflecting a CAGR of 4.92%. It is projected to reach USD 3.36 billion by 2028, growing at a CAGR of 3.64% from 2023.

[34] https://globalmarketmodel.com/DocViewer.aspx?id=163969

3. Spirits

Russia's spirits market expanded from USD 1.86 billion in 2018 to USD 2.44 billion in 2023, achieving a CAGR of 5.58%. It is expected to grow at a CAGR of 2.64%, reaching USD 2.78 billion by 2028.

Food processing industry market trends

High Poultry Meat & Dairy Products Consumption

Over the past decade, Russian consumers have increasingly shifted toward more affordable sources of protein, with poultry emerging as the dominant meat choice. According to FAOSTAT, per capita poultry consumption reached 31.4 kg in 2021, a significant increase from 6.65 kg in 1999[35]. Domestic poultry production has expanded considerably to meet this growing demand, with imports now tightly regulated to stabilize local prices. In the dairy sector, data from the European Union indicates that in 2021, the average Russian consumed approximately 9.35 kg of cheese, 2.69 kg of butter, and 1.05 kg of skim milk powder per year[36]. The sector has undergone steady modernization, driven largely by the growth of industrial-scale farms. This transformation has been bolstered by government subsidies aimed at revitalizing and strengthening domestic dairy production[37].

Processed Foods

Russia is undergoing a significant shift toward convenience-driven eating habits, fueled by increasingly busy urban lifestyles and rising disposable incomes. Leading retailers such as X5 Group, through their Pyaterochka and Perekrestok chains, have made substantial investments in in-house smart kitchens, which now have the capacity to produce up to 100 tonnes of ready-to-eat meals daily. Expansion plans are underway to further scale this output.

The ready meals market is projected to grow by 50% over the next seven years, driven by consumer preferences for prepared foods not only for everyday consumption but also for corporate and social events[38]. In 2024, retailers reported a 24% increase in prepared food sales, with convenience-store formats leading the surge—recording year-on-year growth of up to 83%, particularly in packaged salads, hot dishes, and frozen meal options.

The frozen food sector is also witnessing robust growth, supported by rising demand for quick and traditional dishes such as *pelmeni* and pizza. Currently, frozen ready-to-eat products account for approximately 7% of total frozen food sales, while the ready-to-cook segment is projected to grow at a CAGR of 5% through 2025[39]. These trends reflect a broader global pattern: Russia's processed food sector is rapidly evolving to meet growing consumer demand for convenience, quality, and variety.

[35] Poultry Meat Consumption Per Capita in Russia | Helgi Library
[36] CLAL - Russia: Dairy Sector
[37] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Dairy+and+Products+Annual_Moscow_Russian+Federation_10-15-2020&utm_source=chatgpt.com
[38] The market of ready meals in Russia may grow by 50% in seven years.% | Известия
[39] Russia Frozen Food Market Size Report, 2024-2030

Snack Foods and Beverage Drinks
Russia's snack and beverage market is experiencing robust growth, driven by rising disposable incomes, rapid urbanization, and evolving consumer preferences focused on convenience and wellness. The Russian snack food market is projected to generate approximately USD 7.8 billion by 2025, growing at a compound annual growth rate (CAGR) of 5.9%, with average per capita consumption expected to reach 8.9 kg[40]. While traditional favourites such as potato chips, cookies, and chocolate continue to maintain strong demand, there is a marked shift toward healthier alternatives—including protein bars, fruit-and-nut mixes, and vegetable chips—particularly among younger, health-conscious consumers[41]. In the beverage segment, soft drinks are expanding rapidly, supported by strong consumer interest in functional beverages, vitamin-fortified drinks, energy drinks, and premium bottled water, alongside traditional products like kvass[42]. The smoothies' market is also showing significant potential, expected to grow from USD 320 million in 2023 to USD 546 million by 2030, at a CAGR of 7.9%[43]. Russia's long and harsh winters, combined with a growing urban youth demographic, are fuelling increased demand for convenient, ready-to-eat snacks and health-oriented, on-the-go beverages. These trends are transforming Russia into a dynamic market for both traditional and innovative food and beverage offerings, positioning it as a key growth hub within the broader processed food landscape.

Health Foods
Russia is facing a growing public health challenge linked to poor dietary habits and increasing obesity rates, which is fuelling demand for health-focused food products. Approximately 60% of Russian adults are overweight, and 26.5% are classified as obese, with regional studies confirming a continued upward trend[44]. The prevalence of diabetes is estimated at around 5.3% in 2025, further amplifying consumer interest in low-sugar, low-fat, and functional food options[45]. The Russian government is playing an active role in supporting this shift. Key initiatives include mandatory nutritional labelling for sugar, salt, and fat content; advertising restrictions targeting unhealthy food promotions directed at children; and public awareness campaigns aimed at encouraging healthier eating habits[46]. These combined efforts are fostering a strong, consumer-driven market for wellness-oriented food products in Russia, positioning the country for sustained growth in the health and nutrition segment of the food industry.

[40] Snack Food - Russia | Statista Market Forecast
[41] Russia Snacks Food Market (2025-2031) | Trends, Outlook & Forecast
[42] Russia Soft Drinks Market 2025 – StrategyHelix Ltd.
[43] Russia Smoothies Market Size & Outlook, 2030
[44] Food security and nutrition in the Russian Federation – a health policy analysis - PMC
[45] Health Indicators - Russia | Statista Market Forecast
[46] Russia Healthy Foods Market (2025-2031) | Trends, Outlook & Forecast

Food Processing: Key Stakeholders in Russia

The food processing sector in **Russia** is governed and regulated by multiple stakeholders, playing a vital role in supporting and strengthening the industry. Key stakeholders in the sector include the following:

Government Institutions

Name	Objective
Ministry of Agriculture	Sets policy, regulates, supports industry via subsidies, licensing, research funding
Rosselkhoznadzor (FSVPS)	Monitors veterinary & phytosanitary safety, enforces compliance in processing imports/exports
Rosrezerv	Manages strategic food reserves, stabilizes supply in emergencies
Agricultural Research Institutes	Innovate processing technologies, improve storage, support value-added production
Soyuzmoloko (Dairy Union)	Advocates for dairy processors, quality standards, provides training, assists exports

Major Industry Players

Companies	Sector	Core Competency
Miratorg Agribusiness Holding	Meat and Poultry	Primarily pork and beef (largest pork producer in Russia), also poultry, ready-to-cook offerings, and meat semi-finished goods
United Confectioners	Confectionary	High-quality production of chocolates, toffees, pralines, halva, wafers, and candy, leveraging iconic Soviet-era brands and a strong distribution network across domestic and global markets
KDV Group – Yashkino	Bakery	Specialize in over 350 product types, including: • Waffles, cookies, marshmallow soufflés, gingerbread, toffees, chocolate candies, marmalade • Savory snacks like croutons, potato crisps, pellet chips, dried fish, sunflower & pumpkin seeds, and nuts
Norebo	Fish & Seafood	Cod, haddock, pollock, herring, mackerel, frozen fish
Prostokvashino	Dairy	Milk, Fermented dairy: kefir, ryazhenka, stirred yogurts, Cream & sour cream (smetana), cottage cheese (tvorog) and curd-based snacks (syrki), Soft cheeses and milkshakes

Russia: Trade Overview

Russia holds a prominent position in global trade as one of the world's leading exporters of energy, agricultural commodities, and industrial raw materials. Its trade profile is largely defined by its vast reserves of natural gas, crude oil, and coal, establishing Russia as a key energy supplier to both Europe and Asia.
In addition, the country has emerged as a major global exporter of wheat, sunflower oil, fertilizers, and seafood. In recent years, Russia's trade dynamics have increasingly shifted toward non-Western markets, reflecting a strategic effort to diversify export destinations and reduce dependency on traditional trading blocs.
Given Russia's broad trade portfolio, the following sections outline its major export and import commodities along with its principal trading partners.

Key Export Products & Partners

The following products are top exported items and destinations in the Russia in 2024.

Table: Russia exports of products to the top countries, main commodity and total value, 2024[47]

Main Commodity	Total Value (USD) exported from all countries	Main Partner Country	Commodity Value (USD)
Crude sunflower-seed or safflower oil	3,536,259	India	1,894,276
		Turkey	757,502
		China	649,657
Crabs, whether in shell or not, live, fresh or chilled	1,456,910	China	1,142,257
		Korea	303,691
		Japan	9,041
Low erucic acid rape or colza oil "fixed oil which has an erucic acid content of < 2%", crude	1,139,865	China	1,084,304
		Norway	37,294
		Latvia	16,308
Oilcake and other solid residues	545,045	Turkey	286,846
		China	117,669
		Latvia	48,355
Cane or beet sugar and chemically pure sucrose, in solid form	468,601	Kazakhstan	262,808
		Uzbekistan	151,112
		Armenia	24,376
Chocolate and other preparations containing cocoa	398,984	Kazakhstan	125,113
		Uzbekistan	108,357
		Azerbaijan	40,756

[47] ITC WORLD MAP – RUSSIA, EXPORTS - Trade Map - List of products at 6 digits level exported by Russian Federation in 2024 (Mirror)

Russia's export data, as highlighted in the table, indicates that China, Turkey, Latvia, Kazakhstan, and Uzbekistan are the top five destinations for its overall exports. The main exported products include crude sunflower-seed or safflower oil, crabs, oilcake and other solid residues, and cane or beet sugar, among others.

Key Import Products & Partners

Russia's top 6 overall imports and their corresponding trading partners are listed in the table below.

Table: Russia imports of products from the top countries, main commodity and total value, 2024[48]

Main Commodity	Total Value (USD) imported from all countries	Main Partner Country	Commodity Value (USD)
Food preparations, n.e.s.	917,580	Germany	204,921
		China	92,771
		United States of America	71,549
Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	832,177	Indonesia	538,225
		Estonia	281,562
Wine of fresh grapes, incl. fortified wines, and grape	548,700	Georgia	181,044
		Italy	117,824
		Poland	43,578
Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions	480,094	Germany	179,594
		Ireland	109,574
		Netherlands	38,813
Spirits obtained by distilling grape wine or grape marc	466,051	Armenia	238,655
		Georgia	149,274
		Latvia	28,241
Frozen shrimps and prawns, even smoked	365,509	Ecuador	162,854
		India	123,351
		Argentina	34,956

[48] Trade Map - List of products at 6 digits level imported by Russian Federation in 2024 (Mirror)

Russia's import data, as shown in the table above, indicates that the major imported products include food preparations, palm oil, fresh grape wines, mixtures of odoriferous substances (including alcoholic solutions), spirits obtained by distilling grape wine or grape marc, and frozen shrimps and prawns. The top import sources are Germany, China, Georgia, the UAE, India, Italy, and others.

Russia – India Trade

Russia and India have been longstanding and time-tested strategic partners. The deepening of India-Russia relations continues to play a significant role in shaping India's foreign policy. Since the signing of the "Declaration on the India-Russia Strategic Partnership" in October 2000, the bilateral relationship has acquired a qualitatively new dimension, marked by enhanced cooperation across nearly all sectors.

The two countries have sustained strong collaboration in areas such as politics, security, defence, trade and economy, science and technology, culture, and people-to-people exchanges.[49]

Russia Exports to India

In 2024, total Russian exports to India amounted to USD 64.24 million, of which processed food and agro-based products accounted for USD 2.18 million. The table below presents the top five Russian exports to India over the past three years, based on 6-digit HS codes, with values expressed in USD.

Table: Top 5 Russia Exports to India over the last three years

HS code	Product Label	Russia's export to India			% Growth (from 2023)	India's share% in Russia's Agri- Food Exports in 2024
		2022	2023	2024		
151211	Crude sunflower-seed or safflower oil	803,087	1,058,829	1,894,276	78.9%	53.56%
150710	Crude soya-bean oil, whether or not degummed	104,737	187,797	270,690	44.13%	71.42%
110422	Hulled, pearled, sliced, kibbled or otherwise worked oat grains (excl. rolled, flaked, pellets)	0	353	11,756	3230%	91.37%
030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns	833	0	320	100%	3.91%
220860	Vodka	467	1,054	307	-70.87%	0.47%

Source: ITC Trade Map

[49] https://www.ibef.org/indian-exports/india-russia-trade

- Oat grains and frozen shrimps and prawns recorded significant growth rates, with increases of 3230% and 100%, respectively.
- Crude sunflower-seed or safflower oil appears to be a commodity for which Russia and India act as exclusive trading partners.

Russia imports from India

In 2024, Russia's total imports from India amounted to USD 4.92 million, of which processed food and agro-based products accounted for USD 0.34 million. Russia imports worth of USD 13.77 million ayurvedic medicine from India.[50] And imports Indian Tea worth of USD 123.31 million.[51]

The table below highlights Russia's top five imports from India over the past three years, based on 6-digit HS codes, with values presented in USD thousands.

Table: Top 5 Russia Imports from India over the last three years

HS code	Product Label	Russia's import from India			% Growth (from 2023)	India's share% in Russia's Agri- Food Imports in 2024
		2022	2023	2024		
030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns	119,578	148,949	123,351	-17.1%	2.81%
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	56,391	64,221	70,668	10.03%	0.62%
151590	Fixed vegetable fats and oils and their fractions, whether or not refined	7,850	19,306	18,800	-2.62%	17.00%

[50] https://www.seair.co.in/blog/ayurvedic-medicine-export-from-india.aspx#:~:text=exporter%20of%20Ayurveda?-,For%20the%20fiscal%20year%202023%E2%80%932024%2C%20India%20exported%20$651.17%20million,of%20ayurveda%20in%20the%20world.

[51] https://www.ibef.org/exports/indian-tea-industry#:~:text=During%20FY25%20(April%2DDecember)%20UAE%2C%20USA%2C%20Iraq,Pakistan%2C%20and%20Australia%2C%20etc.

200811	Groundnuts, prepared or preserved (excl. preserved with sugar)	2,436	7,741	15,801	104.12%	13.61%
151530	Castor oil and fractions thereof, whether or not refined, but not chemically modified	12,043	13,684	14,333	4.74%	1.35%

Source: ITC Trade Map

- Groundnuts recorded a high growth rate of 104.12%.
- All other commodities also registered significant growth in trade between the two countries.

Areas of Collaboration

Collaboration in Grain, Oilseed, and Marine Raw Material Trade

Russia is a global powerhouse in the production of wheat, barley, sunflower oil, and seafood, particularly crab and white fish. India stands to benefit from stable, high-quality imports of these raw materials to support its expanding processed food industry. At the same time, India can export niche products such as pulses, millets, spices, and tropical fruits to help address Russia’s domestic sourcing limitations, creating a mutually beneficial trade partnership.

Joint Development of Processed Food for Eurasian and South Asian Markets

Russia’s strengths in dairy, bakery, and ready-to-eat frozen products can be effectively complemented by India’s expertise in spice blends, plant-based foods, and ethnic flavours. This synergy creates opportunities for co-branded, value-added food product lines tailored for the Eurasian Economic Union (EAEU), Middle East, and Southeast Asian markets.

Cold Chain and Frozen Food Logistics Integration

Given Russia’s well-established cold chain infrastructure, particularly in meat, dairy, and seafood, there is strong potential for collaboration with India in areas such as best practice sharing, technology upgrades, and investment partnerships. Such cooperation can help strengthen India’s cold chain ecosystem, while enabling Russian firms to gain access to India’s expanding market for frozen and processed foods.

Bilateral Investment in Food Parks and Processing Zones

Russian agri-businesses and food processing companies can explore investment opportunities in India’s Mega Food Parks, Agro-Processing Clusters, and Production Linked Incentive (PLI) schemes for the food processing sector. Conversely, Indian firms can consider establishing spice-processing and Ayurveda-based food units in Russia to enable localized production and gain access to the Eurasian Economic Union (EAEU) market.

Research Partnership on Functional and Health Foods

There is a growing global demand for functional, immunity-boosting, and nutraceutical food products. India and Russia can collaborate on joint research and development (R&D) in this domain—combining India's traditional ingredients such as turmeric, moringa, and ashwagandha with Russia's expertise in dairy probiotics and fermentation science to develop globally competitive health food offerings.

Certification and Food Quality Harmonization for Export Readiness

To facilitate smoother food trade, collaboration is essential in harmonizing food safety standards, labelling requirements, Codex compliance, and organic certification. Joint efforts between Russian regulatory bodies and Indian agencies such as FSSAI and APEDA can help streamline certification processes, enable mutual recognition, and ensure faster market access for food products from both countries.

Skill Development through Technical Training and Academic Exchange

Indian food processing institutes and universities can collaborate with Russian agricultural universities to develop sector-specific human capital through initiatives such as faculty exchange, technical training programs, internships, and industry immersion opportunities. Such collaborations can significantly enhance mid-level food processing capabilities in both countries.

Strategic Trade Facilitation and Market Access Platforms

Joint platforms can be established to promote bilateral food exports, including India-Russia food product showcases, B2B matchmaking events, and joint participation in global trade fairs. Russia's access to Eurasian Economic Union (EAEU) markets and India's Free Trade Agreements (FTAs) with Asia-Pacific and Middle Eastern countries can be strategically leveraged to expand market outreach and enhance trade opportunities.

About World Food India

A global event to facilitate partnerships between Indian and international businesses and investors, World Food India (WFI) is a gateway to the Indian food economy and an opportunity to showcase, connect and collaborate.

Write to us at:

Ministry of Food Processing Industries,
Government of India
Panchsheel Bhawan, New Delhi, India.
Telephone Number: +91 11-26496647
Email Id: world-foodindia@gov.in
Find us at: **www.mofpi.gov.in**
www.worldfoodindia.gov.in