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Market for Dried Fruits Expected to Grow in 2014

Report Categories:

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Agricultural Situation

Snack Foods

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Report Highlights:

Russia is a major global importer of dried prunes and dried apricots. In 2013, Russia purchased 203,400 metric tons (MT) of dried fruits valued at \$274.4 million - down 1 percent in volume resulting from the shortage of Uzbek raisins and dried apricots but up 2 percent in value. Post expects the Russian market for dried fruits will grow in 2014 and beyond as the “living healthy” lifestyle trend continues to expand throughout the country. Nearly 80 percent of all dried fruits imported into Russia come from the Middle East. The U.S. share is 4.4 percent of total market value. However, in 2013, U.S. exports of dried fruits to Russia grew 71 percent and reached 5,823 MT valued at \$12.3 million.

General Information:

Russia is a major global importer of dried prunes and dried apricots. In 2013, Russia purchased 203,400 metric tons (MT) of dried fruits valued at \$274.4 million - down 1 percent in volume resulting from the shortage of Uzbek raisins and dried apricots but up 2 percent in value. Market analysts believe that the Russian market for dried fruits will grow in 2014 and beyond as the “living healthy” lifestyle trend continues to expand throughout the country. Nearly 80 percent of all dried fruits imported into Russia come from the Middle East. The U.S. share is 4.4 percent of total market value. However, in 2013, U.S. exports of dried fruits to Russia grew 71 percent and reached 5,823 MT valued at \$12.3 million. New-to-market U.S. dried sweetened cranberries showed amazing growth from 0 in 2011 to \$1.7 million worth of sales in 2013. This number is expected to double in 2014 as Russian consumers become more familiar with this product.

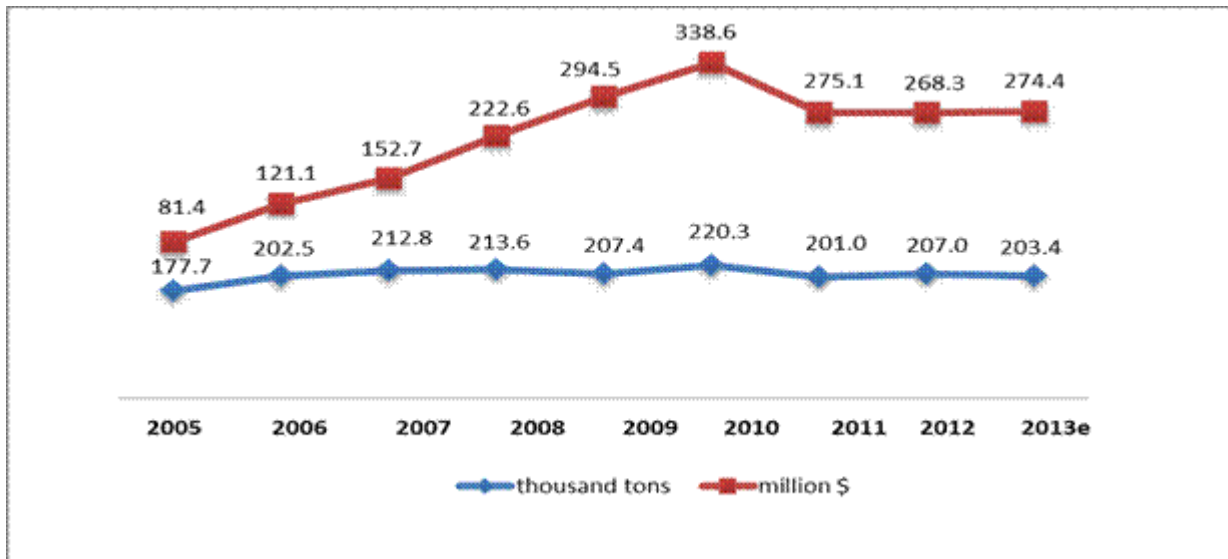
In July 2010, Russia, Belorussia, and Kazakhstan established a Customs Union (CU) with united custom territory where no duties are applied to products and goods travelling between member countries.

According to the industry contacts, since 2010, Tajikistan and Uzbekistan began shipping products to Russia via Kazakhstan because the value added tax (VAT) [1] in Kazakhstan is 12 percent – significantly lower than Russia’s 18 percent VAT. In addition, it is less burdensome (and cheaper) to clear products in Kazakhstan through Customs and then transship them to Russia. As a result, trade figures on dried fruits are not entirely accurate as they don’t take into account the transshipment of products.

According to the Global Trade Atlas (GTA), exports of dried fruits from Tajikistan and Uzbekistan to Russia dropped from 111,920 MT in 2009 to 19,356 MT in 2011 while exports to Kazakhstan jumped from 2,069 MT in 2009 to 92,403 MT in 2011. Trade contacts informed Post that the volumes of dried fruits exports to Russia from Tajikistan and Uzbekistan remained at the pre-Customs Union level as there is no shortage of product in the market. The export numbers in the below table and further in the report include estimates of Tajik and Uzbek dried fruit exports to Russia including the products that are transshipped via Kazakhstan.

^[1] VAT is paid when the importer clears shipment and is equal to 18 percent of the customs value in Russia.

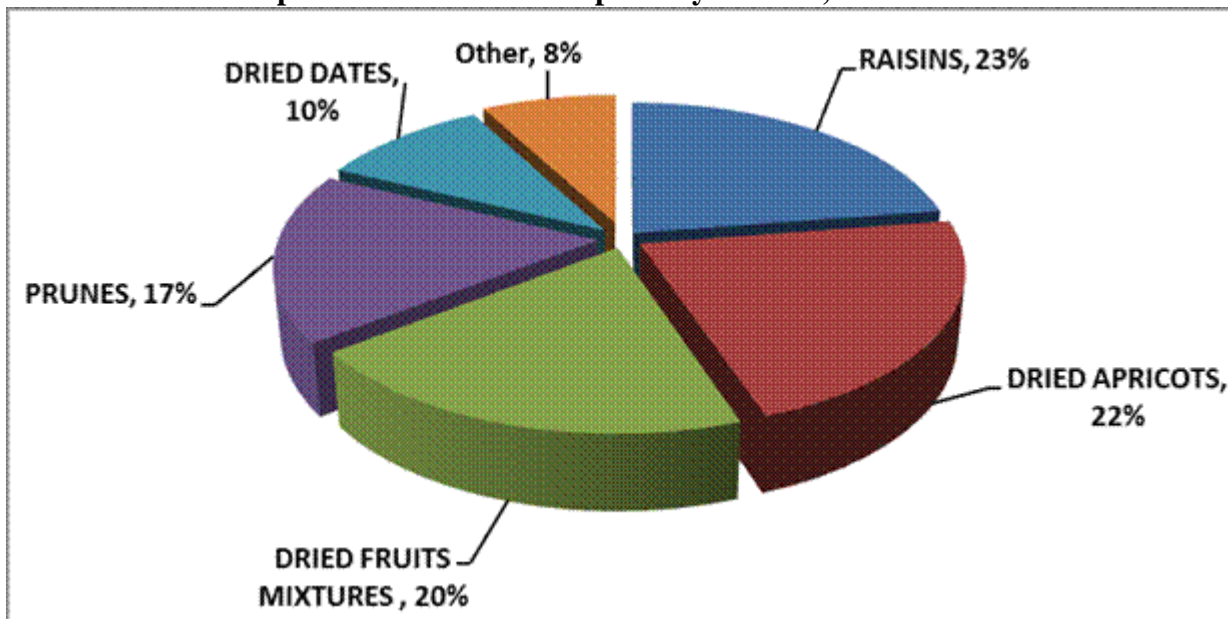
Chart 1. Russia: Imports of Dried Fruits CY 2005-2013.



Source: Global Trade Atlas; Customs Union Export Data; Industry Contacts

The most popular dried fruits in Russia are raisins, dried apricots, and prunes. Demand for dried cranberries is growing rapidly due to better educational and promotional activities taking place in Russia.

Chart 2. Russia: Imports of Dried Fruit Imports by Volume, CY 2013.



Source: Global Trade Atlas; Customs Union Export Data; Industry Contacts

The consumption of dried fruits is growing along with the “healthy lifestyle” trend that has taken hold in Russia. Russian consumers are becoming more and more aware that dried fruits can be added as part of a healthy diet. The overall consumption and popularity of “natural” snack products (dried fruits, nut, and sun flower seeds) is growing at a steady pace. According to Food and Drinks Magazine [2], the natural snacks segment is the most dynamically developing category in the snack group. The production

of snacks grew again in 2013 by 3 percent and reached 352,500 MT.

Also, expanding modern retail chains are offering better assortment of dried fruits at different price points providing greater exposure to Russian consumers. In 2013, retail sales in Russia reached 23.7 trillion Rubles (\$646 billion [3]), 3.9 percent increase in Rubles compared with the previous year. The big retail chains are expanding their presence outside of the big cities in Russia giving Russians in smaller and medium-sized cities a broader assortment of products including dried fruits.

The majority of consumers in Russia are very price sensitive so even slight increases in prices of dried fruits could affect overall demand. According to Russian Statistic Committee, in the 4th quarter of the 2013, consumer confidences continued to decline along with the slowdown in the Russian economy.

Thirty percent of respondents stated that their financial situation worsened in 2013. Real disposable income in January 2014 declined 1.5 percent compared with January 2013. All of this is having an impact on purchase patterns in Russia as consumers begin cutting back and choosing more carefully inside of grocery stores. Food processors also are trying to produce quality products at affordable prices which has led some manufacturers to modify their ingredients based on prices.

From January 1 - March 14, 2014, the Russian Ruble decreased significantly from 32.65 Ruble/US Dollar to 36.64 Rubles/US Dollar. Market analysts are watching to see what impact this will have on imported food products from European and U.S. exporters. As for dried fruits, it is widely expected that shipments from the United States will decline in 2014 as exports of less expensive dried fruits from Tajikistan, Iran, and Afghanistan grow. To follow all ruble fluctuations please see <http://bankir.ru/kurs/dollar-ssha-k-rossijskij-rubl>

Traditionally, the vast majority of dried fruits arrive to Russia from the Middle East region. Currently, the major exporters to Russia are: Iran (raisins and dates), Tajikistan (dried apricots and dried fruit mixtures), Uzbekistan (raisins), Turkey (dried apricots), Chili and Argentina (prunes).

The United States exports prunes, dried sweet cranberries, and some raisins to Russia although its share is only 4.4 percent of the market share. In 2013, U.S. exports of these commodities grew 71 percent and reached 5,823 MT worth \$12.3 million. Prunes make up the majority of U.S. dried fruits shipments – 76 percent of total. Sweet dried cranberries make up 13.3 percent and raisins accounting for the remaining 10.7 percent. U.S.-origin dried fruits are well known in Russia for their quality and consistency but also as one of the most expensive in the Russian market. The new-to-market product dried sweetened cranberries have shown amazing growth from 0 to \$1.7 million sale in 2013. Prunes, dried cranberries, and raisins have the best prospects among U.S. dried fruits in the Russia market although the depreciating Ruble is

^[2] Food and Drinks magazine is the Russian analytical magazine about the Russian Food Market

^[3] The exchange rate is 36.64 Rubles per one U.S. dollar on the 14th of March 2014. Please see the exchange rate daily fluctuation on <http://bankir.ru/kurs>

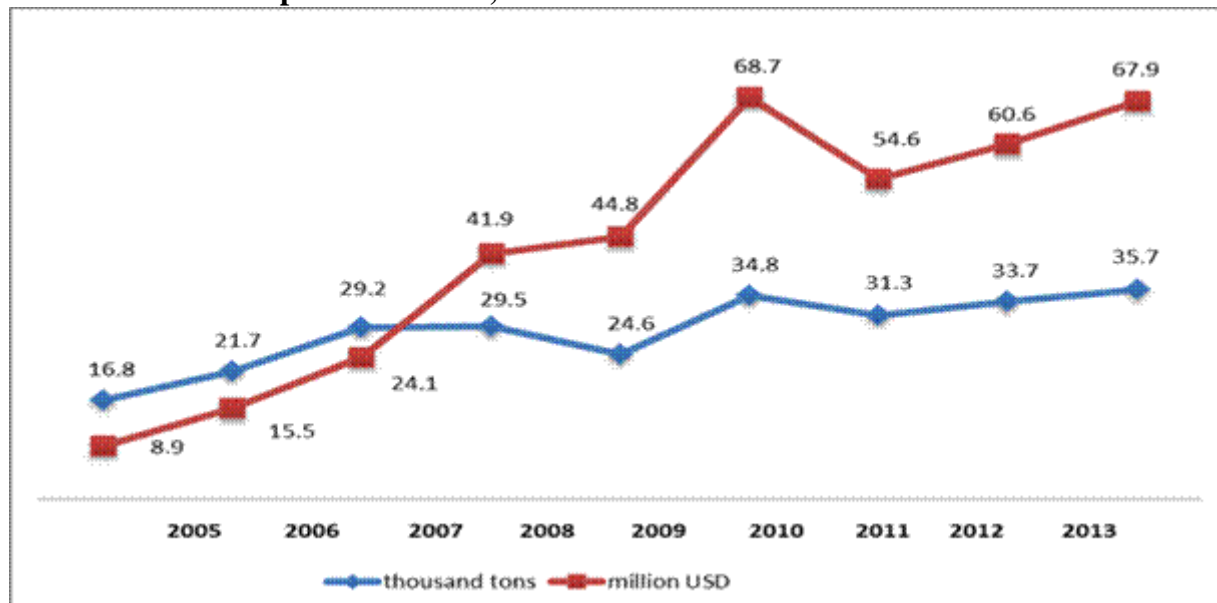
expected to slow down the pace of growth seen in 2013.

Dried Prunes (081320):

Russia is the biggest importer of prunes in the world as this country does not produce any commercial

plums. All dried plums are supplied for consumption by import. In 2013, Russia imported 35,700 MT of prunes valued \$ 67.9 million, 6 percent higher in volume and 12 percent in value compared to 2012 [4] . However, in 2014, Russia’s imports of prunes are forecast to decline due to the lower crop in Chile which has bumped world prices higher.

Chart 3. Russia: Imports of Prunes, CY 2005-2013.



Source: Global Trade Atlas; Customs Union Export Data; Industry Contacts

In 2013, the leading suppliers of prunes to Russia were Argentina (11,342 MT) and Chile (10,658 MT). These two countries alone make up 60 percent of the Russian prune market. South American prunes are dominating the Russian market because the food industry and packers are content with the balance between price and quality of the product, according to the food industry contacts. In 2013, Chile’s harvest was significantly lower than expected resulting in a decline in exports of 37 percent to Russia.

Serbia is expanding its share on the Russian market and shipped 2,841 MT of prunes in 2013 – valued at \$6.9 million. Although Serbian prunes do not have stable quality preferred by Russian consumers and food processors, demand for its product is strong. Tajikistan and Uzbekistan shipped 5,288 MT of prunes to Russia in 2014 valued at \$4.2 million. Prunes from these countries are traditionally sold at outdoor markets and specialized nut and fruit kiosks by weigh which are located all over the big cities such as Moscow and St. Petersburg. The share of these products isn’t expected to grow in 2014 and beyond as Russian processors and packers prefer to

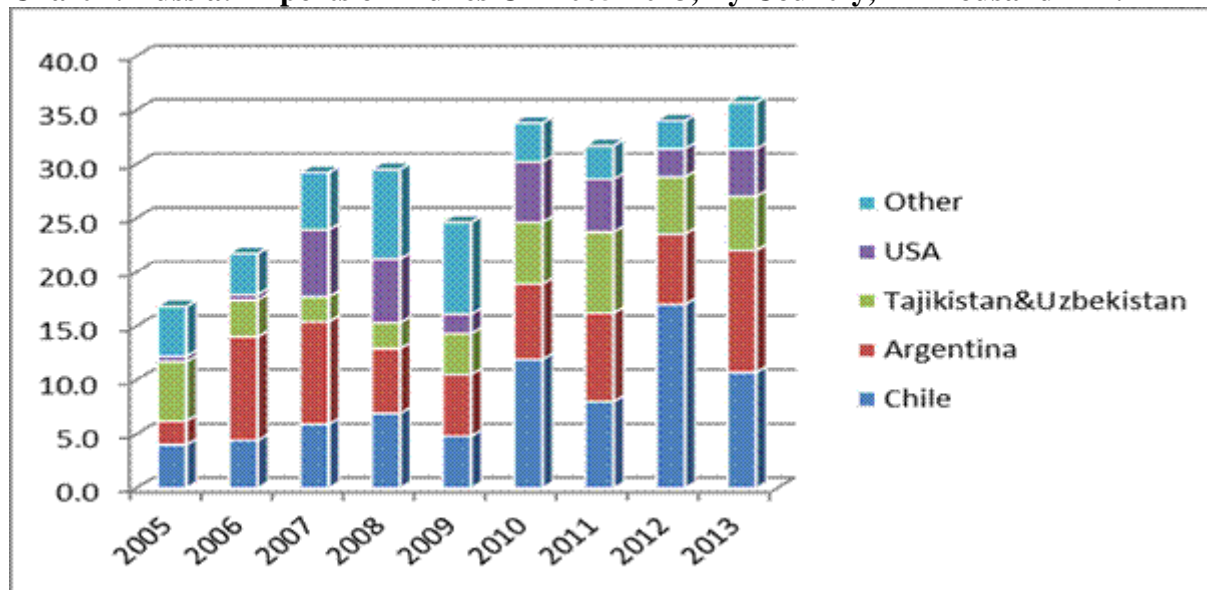
^[4]These numbers include Post estimates of Uzbek and Tajik products transshipped via Kazakhstan to Russia from 2010 - 2013.

work with more stable supplies (and more consistent quality) prunes from the Americas.

The United States is currently the third largest supplier of prunes to Russia with 12.3 percent market share in in 2013. In fact, 2013 was a great year for U.S. prunes as exports to Russia grew by 69 percent compared to 2012 reaching 4,411 MT valued at \$9.3 million. Rising world prices for prunes made U.S. prunes much more competitive in Russia last year. Chile and Argentina are the United States’ main

competitors in Russia in terms of quality and price. U.S.-origin prunes are top quality but are often more expensive than South American product. The industry experts have advised Post that global prices are unusually high for the market and the demand for prunes from some processors has already declined in 2014. Nevertheless, U.S. prunes are well known in Russia for their stable quality and good taste.

Chart 4. Russia: Imports of Prunes CY 2005-2013, By Country, in Thousand MT.



Source: Global Trade Atlas; Customs Union Export Data; Industry Contacts

Consumption:

Prunes are the third most popular dried fruit in Russia, after raisins and apricot, and broadly used in home cooking. Prune consumption is driven by the retail sector in Russia. In 2011, according to Euromonitor, 73 percent of all prune purchases in Russia took place in retail stores. A large portion of imported prunes arrive to Russia in bulk, which are then packed locally in consumer packaging with Russian brands and labels. Most Russian packers include country of origin on packaging but others not. However, most Russian consumers are more interested in the best combination of price, taste, and quality with regards to prunes.

Prunes are sold in different packaging 150 - 900 gram (gr) and loose. The smaller packaging is usually goes for snacking, and 500 - 900 gr packaging is used in home cooking. American prunes under Sun Star, Hill View, Champion brands packed in the United States are available in 250-500 jars and bags are available in supermarkets, hypermarkets, markets, and fruit & nuts kiosks and popular because of the very good quality and taste. The consumption of natural snacks is going up as Russian consumers learn more about the nutritional value and benefits to health of including prunes and other such products into their diets. In addition, prunes are one of the most broadly used dried fruits in cooking deserts, salads, and meat dishes in Russia. The demand for prunes in retail is likely to grow when global prices stabilize. When prices are high, Russian consumers tend to substitute prunes for less expensive dried fruits.

According to Euromonitor, supermarket/hypermarket is the main retail channel for prunes with expected 55 percent of total retail sales of prunes in 2014. Open markets are the second biggest selling format for

prunes with its share going down from 18.2 percent in 2011 to 15 percent in 2014. Independent stores, convenience stores, and other such stores (street fruit and nut kiosks, fruits stalls) are expected to contribute up to 8, 10, and 12 percent of total retail prune sales in 2014.

After retail, the second biggest consumer of dried prunes is the food processing sector. According to Euromonitor, in 2011, 27 percent of domestic consumption went to industrial processing and food service. Food processing uses less expensive and smaller sized prunes as ingredients in confectionary, dairy, baking, and ice cream production. Prunes usually are cut and diced for further processing. For premium products, top quality prunes are used, but, according to food industry specialists, makes up only 5 percent of all prunes going to food processing. Prunes for chocolates, deserts with prune based mousses or cream, prune yogurt and yogurt drinks are very popular with Russian consumers. However, the increased price for prunes as seen in 2013 has slowed the demand for prunes from the food processing sector.

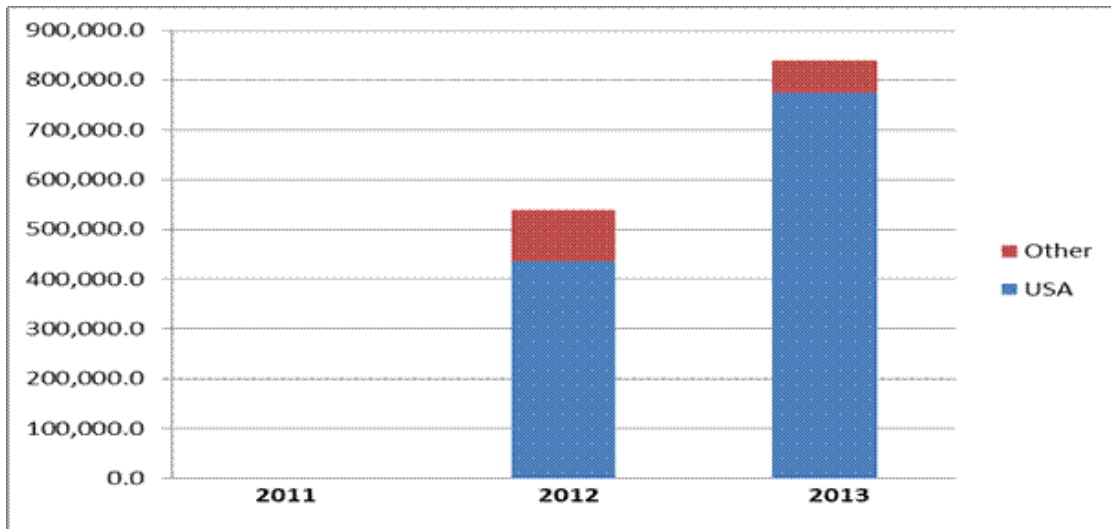
Dried Sweet Cranberries (2008 93):

Dried sweet cranberries are new to the Russian market but gaining popularity amongst consumers. Although, Russia is one of the largest producers of wild cranberries in the world, virtually all of it is consumed fresh, canned or frozen. Dried sweetened cranberries are not produced in Russia in commercial volumes. According to a variety of industry contacts, the wild cranberry production in Russia varies from 74,000 MT to 25,000 MT each year. Russian wild cranberries are small, round, and dark red with a very tart taste (*Vaccinium oxycoccos*) and quite different from cranberries cultivated in North America (*Vaccinium cacrocarpon*). Most of the cranberries grow wild in the forests and marshes are handpicked by local residents. Almost all domestic cranberries are consumed fresh during the season or are “flash frozen” for food processing. The farming of wild cranberries is not a developed sector yet in Russia.

Russians love to consume wild berries and view them as very beneficial to their health. An important Russian tradition that lives on today is the collection of berries in the summer and preserving them for the winter months. Sweetened dried cranberries are increasingly popular as a snack option and often included in the dried fruits and nuts mixes as one of the basic ingredients. Dried sweeten cranberries whole and cut are increasingly used as ingredient in bakery, confectionary, health bars, and production of breakfast cereals.

Russian imports of sweeten dried cranberries jumped from almost zero in 2011 to 900 MT in 2013 valued \$1.7 million. In the month of January 2014, Russian imports of the product tripled compared to the same month in 2013. Post expects U.S. exports of sweetened dried cranberries to Russia to double in 2014 due in large part to growing consumer demand. The United States is the major supplier of this product to Russia with 93 percent market share. In 2013, U.S. exports reached 774 MT for \$1.5 million, up 70 percent up compared to 2012.

Chart 5. Russia: Imports of Dried Sweet Cranberries, CY 2011-13, by Country, in MT.



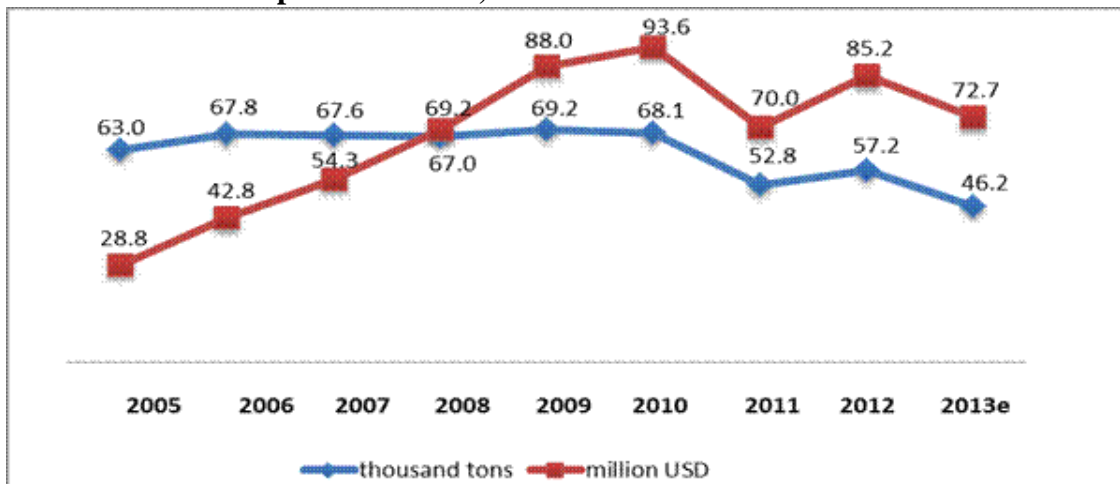
Source: Global Trade Atlas

Raisins (0806 20):

Russia does not produce grapes for raisin production commercially and, as such, imports everything for consumption. In 2013, Russia imported 46,150 MT valued at \$72.7 million, down 20 percent in volume compared with 2012 due, primarily, to unusually low supply from Uzbekistan. In 2014, Russian imports of raisins are expected to grow assuming a steady supply from primary supplier Uzbekistan.

In general, the Russian raisin market is saturated as new varieties of dried and sweetened fruits are available in the market and some consumption is driven to these new products. However, raisins remain the bestselling dried fruit in Russia because of their affordable price and use for home cooking and for food processing.

Chart 6. Russia: Import of Raisins, 2005-2013.

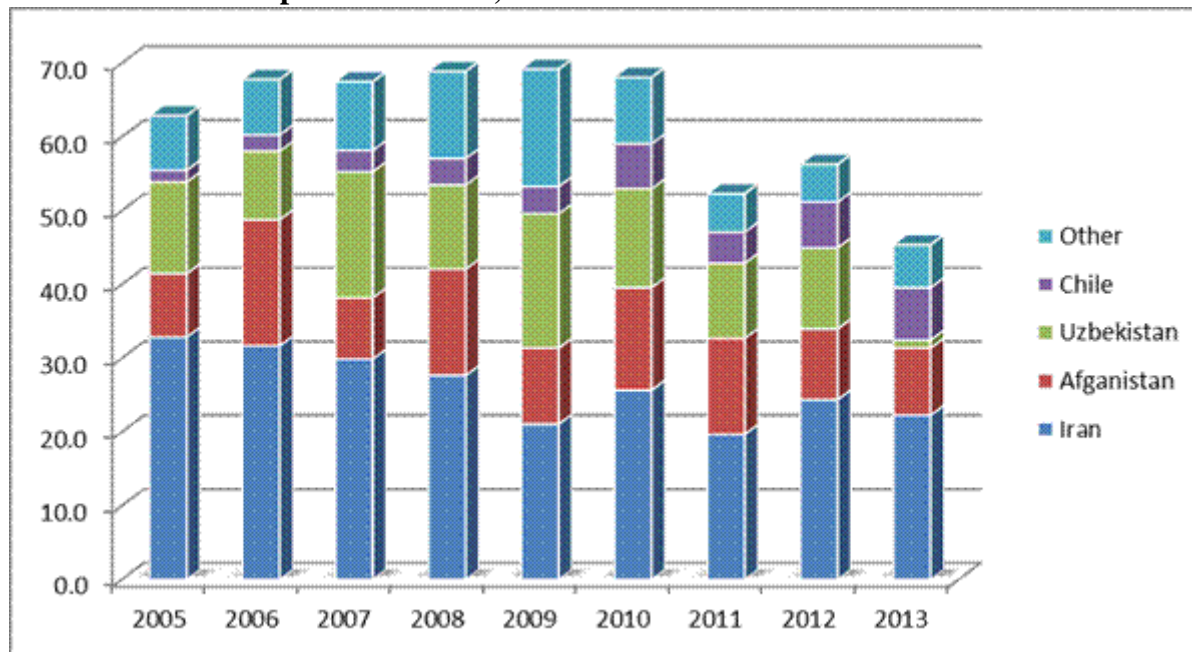


Source: Global Trade Atlas; Customs Union Export Data; Industry Contacts

The major suppliers of raisins to Russia are Iran (47 percent share of the market), Afghanistan (22 percent), and Uzbekistan (20 percent). These three countries traditionally supply up to 80 percent of all Russian imports. The quality of Afghan and Uzbek raisins have increased in recent years thanks to new

and more efficient gathering and production techniques. Chile increased its share from 2.5 percent in 2005 to 13.3 in 2013 due to the demand for high quality raisins for the food processing sector. The supply of U.S. raisins to Russian is relatively small and its share is around 1 percent of the total Russian market. It is important to note that 2013, U.S. exports of raisins doubled totaling 628 MT valued \$1.4 million. Industry contacts have stated that U.S. raisins are of the best quality available in the market and used for premium product production in Russia. In Russia, U.S. raisins compete primarily with Chilean product although the U.S. raisins are roughly 35 percent higher.

Chart 7. Russia: Imports of Raisins, 2005-2013.



Source: *Global Trade Atlas; Customs Union Export Data; Industry Contacts*

Raisins are the most popular dried fruit in Russia with 23 percent market share. However, overall Russian consumption of raisins are not expected to grow significantly over the next few years as new varieties of dried fruits begin to appear in the Russian market.

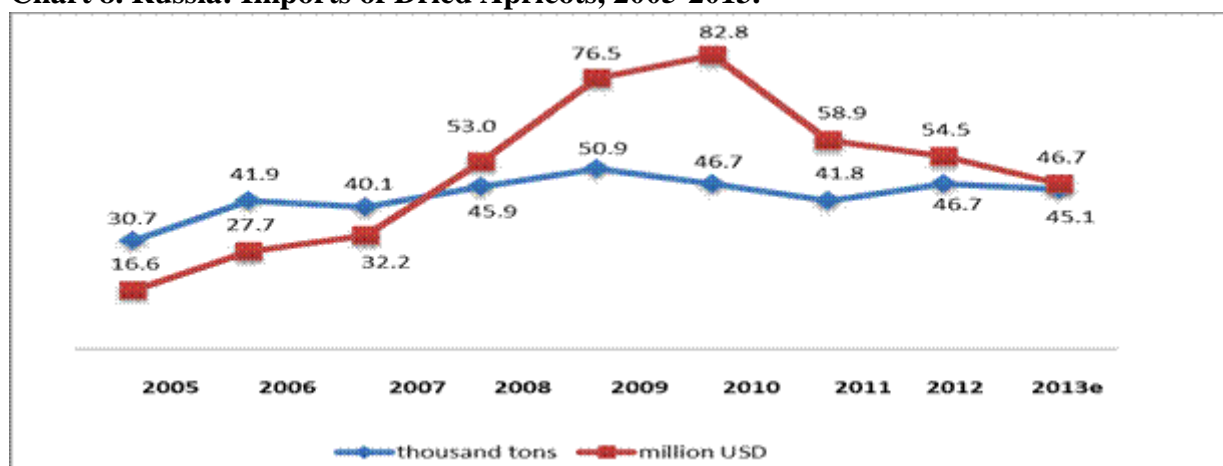
Russians traditionally use raisins in home cooking. Also, raisins are popular as a snack product. Russian don't recognize the variety of dried grapes, they differentiate the product by color and size; red, yellow big, brown, dark brown small, etc. Consumers usually pick raisins by price and color, size and taste. Most consumers don't know much about raisin varieties and don't much attention to the product country of origin. Raisins are presented almost in all retail formats in 100/150/200/250/500/800 gr bags or jar. The smaller packaging is very popular as a "on the go snack" and the bigger sizes are usually bought for family consumption and home cooking.

Russia's food processing and hospitality industries consume around half of all imported raisins as they are commonly used in baking, confectionary, breakfast cereals and ice-cream production. Smaller sizes of dried grapes are very popular in Russia especially with bakeries. It is the least expensive dried fruit available making it even more important now as the Russian Ruble continues to weaken.

Dried Apricots (0813 20):

Russia doesn't produce apricots commercially and, thus, is the largest importer of apricots globally. In 2013, Russia's imports declined by 5 percent totaling 45,100 MT valued around \$46.5 million [5]. This decrease resulted from a shortage in supply from Uzbekistan – traditionally one of the biggest exporters of dried apricots to Russia. Imports of dried apricots are expected to increase in 2014 assuming Uzbekistan has a normal production year.

Chart 8. Russia: Imports of Dried Apricots, 2005-2013.



Source: *Global Trade Atlas; Customs Union Export Data; Industry Contacts*

Around 90 percent of all dried apricots supplied to Russia come from the Middle East. The leading supplier of dried apricots to Russia is Tajikistan (49 percent of the market) followed by Turkey (27 percent) and Uzbekistan (10 percent). Tajik and Uzbek products have always been broadly available in the Russia market and consumers got used to the taste of these dried apricots which is bought primarily for home cooking. Tajik and Uzbek dried apricots are very moist and are sold basically by weight at outdoor markets and retail establishments. More expensive Turkish dried apricots have better shelf life and head to snack packing and food processing.

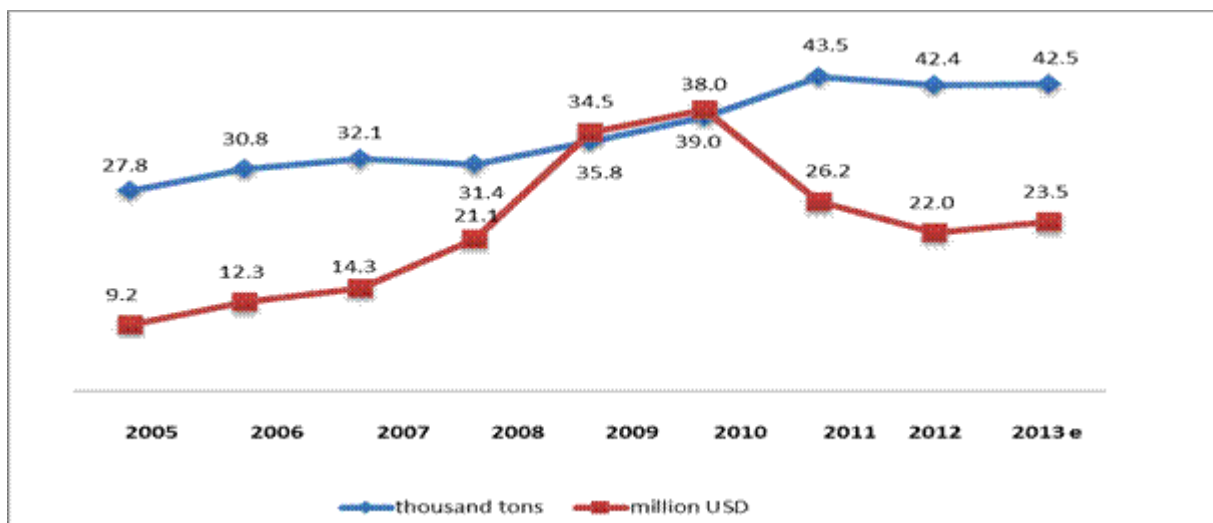
U.S.-origin dried apricots are not readily available in the Russian market. In 2013, U.S. exports reached 68 MT valued \$366,176. U.S. dried apricots are roughly 70 percent more expensive than Turkish product as the logistics of shipping from the United States to Russia is more complicated and much more expensive than from nearby countries. Thus, U.S. exporters are unlikely to expand sales to Russia in 2014 and beyond.

[5] The post estimation includes the transshipment of raisins from Tajikistan and Uzbekistan.

Other dried fruit:

Russia is a major importer of dried fruit mixes. In 2013, total imports are estimated at 42,500 MT valued at roughly \$23.5 million. Tajikistan and Uzbekistan traditionally supply up to 98 percent of all dried fruit mixes to Russia.

Chart 9. Russia: Import of Dried Fruit Mixture, 2005-2013



Source: Global Trade Atlas; Customs Union Export Data; Industry Contacts

The larger part is of all dried fruit mixes category is a special mix for making traditional Russian fruit drink “kompot” – also known as “kompotnaya smes” by Russian industry representatives. This dried fruit mixture is composed of dried apples with smaller portions of dried pears, apricots, and raisins. According to trade contacts, the largest consumers of these mixtures are institutions like the military, prisons, hospitals, and schools. The demand from this sector for dried fruit mixture for making kompot is growing. This fruit drink is a part of a family cooking tradition in Russia that has lasted hundreds of years, although it is becoming slightly less popular with the young generations.

Raisins, dried apricots, prunes, and dried fruit mixtures make up around 82 percent of Russia’s market volume. The remaining 18 percent is exotic fruits including dried dates with 10 percent of the market share (19,500 MT), dried figs with 3 percent (6,500 MT), and other exotic or rare dried fruits. In 2014, the market is expected to remain stable for these products. The major suppliers of dates are Iran and Tunisia which exported 9,944 MT and 6,900 MT respectively in 2013. Turkey traditionally supplies up to 98 percent of dried figs to Russia. Dried date and figs are well known to the Russian consumer as these fruits are usually bought for snacking or healthy desserts. Dried dates and figs are available in the supermarket, nut kiosks and market places in Russia.

Policy:

Dried fruits are subject to sanitary-epidemiologic and phytosanitary inspections. Every shipment should be accompanied with phytosanitary certificates. The sanitary–epidemiological requirements can be found on the website of the Customs Union:

http://www.eurasiancommission.org/ru/act/texnreg/depsanmer/sanmeri/Pages/P2_299.aspx

The phytosanitary requirements is reported in the GAIN report RS1102 _ Russia Updates Quarantine Regulations of Imported Products _ Moscow _ Russian Federation _ 1/18/2011

(http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Russia%20Updates%20Quarantine%20Regulations%20of%20Imported%20Products_Moscow_Russian%20Federation_1-18-2011.pdf), which provides the list of quarantine objects that shall be controlled in products imported from the United States.

On December 20, 2013, new Russian Hygiene Norms and Maximum Residue Limits (MRLs) for pesticides and chemicals was adopted in Russia in 2013 and could be found in Foreign Agricultural Service report:

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/New%20Russian%20MRLs%20for%20Pesticides%20in%20Agricultural%20and%20Food%20Products_Moscow_Russian%20Federation_1-10-2014.pdf

Customs Tariff:

Customs tariff for dried fruit is calculated based on the percentage of customs value of in U.S. dollars or Euros. Dried fruits from less developed and certain developing countries qualified for the preferential import duties under the Customs Union Commission Decision #130. Product from the least developed countries enjoys zero tariffs and from the developed countries is 75 percent of the unified tariff. The major competitors of the United States in dried fruits like Argentina, Chile, and Turkey are in the list of the developing countries and 75 percent tariff is applied to the dried fruits form these countries. That adds significant advantage to the products imported from these developing counties.

Upon the accession to World Trade Organization (WTO) Russia gradually declined its tariffs for dried fruits. Tariffs for prunes and raisin are already two times lower than pre-accession levels and equal to 5 percent of the customs valuation. Below is the table advising of current customs tariffs with planned reductions in 2014 and 2015.

Chart 10. Russia: Harmonized Codes and Tariffs for Dried Fruits, With Year Decline

HS Code	Description	Tariff Upon Accession	2013	2014	2015
0803 90 900 0	Dried bananas	5, but nlt 0.02 €/kg	4, but nlt 0.015 €/kg	4, bnlt 0.015 €/kg	
0804 10 000 9	Dried dates	8	5	5	
0804 20 900 0	Dried figs	15	13.3	planned 11.7 current 5	10
0804 30 000 9	Dried pineapple	5	4	planned 3 current 4	
0804 50 000 9	Dried guava, mango and mangostan, or gamboge	5	4	planed 3 current 5	
0806 20 100 0	Dried grapes Korinka	10	8.3	planed 6.7 current 5	5
0806 20 300	Dried grapes Sultana	10	8.3	planed 6.7	5

0				current 5	
0806 20 900 0	Dried grapes other	10	8.3	planned 6.7 current 5	5
0813 10 000 0	Dried apricots	10	9	planned 8 current 5	
0813 20 000 0	Prunes	10	7.5	5	
0813 30 000 0	Dried apples	10	9	planned 8 current 9	
0813 40 100 0	Dried peaches including nectarine	10	7.5	planned 5 current 7.5	
0813 40 300 0	Dried pears	10	7.5	planned 5 current 7.5	
0813 40 500 0	Dried papaya	10	7.5	planned 5 current 7.5	
0813 40 600 0	Dried tamarind	10	7.5	5	
0813 40 650 0	Dried papaya, tamarind, anacard or cashew apple, litchi, jackfruit, sapodilla, passiflora, passionflower, karambola, and pitaya			7.5	
0813 40 950 0	Other dries fruits excluding products under 0801-0806 HC	10	7.5	planned 5 current 7.5	
0813 50 120 0	Mixtures of dried papaya, tamarind, anacard or cashew apple, litchi, jackfruit, sapodilla, passiflora, passionflower, karambola, and pitaya without prunes excluding products under 0801-0802 HC			10	
0813 50 150 0	Other mixtures of dried fruits excluding products under 0801-0802 without prunes			10	

0813 50 190 0	Other mixtures of dried fruits excluding 0801-0802 HC with prunes			10	
0813 50 910 0	Other mixtures of dried fruits without prunes and figs			10	
0813 50 990 0	Other mixtures of dried fruits			10	

Market Access:

The best way to learn more about market trends in Russia is to meet with local importers and distributors. Therefore, Post recommends participation in one of the major food and beverage shows in Russia. The Agricultural Trade Office (ATO) in Moscow arranges a USA Pavilion at World Food Moscow every year - one of the biggest food trade shows in Russia, <http://www.world-food.ru>. In 2014, the World Food Moscow trade show will take place September 15-18. Last year, World Food Moscow attracted 1,660 companies from 70 countries and roughly 27,000 trade visitors from 79 Russian regions and 89 foreign countries. It is an excellent place to make initial contact with Russian importers and evaluate the potential for your product in the Russian market. Please see the interview with companies participated in American Pavilion in 2013. <http://www.usda.ru/media-foto-video.html>.

Please contact atomoscow@fas.usda.gov for more details.