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February 6-7, 2020

X International Forum

Brewing Industry of the Russian Federation 2030 - A Look into the Future

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Resolution of delegates

X International Forum "Brewing Industry of the Russian Federation 2030 - A Look into the Future"

Moscow State University of Food Production

February 6-7, 2020

423 delegates

Russian Federation (45 regions)

Armenia, Belarus, Kazakhstan

Austria, Germany, Denmark, Belgium, Holland, USA, Switzerland, Czech Republic

with the participation of senior officials:

Ministry of Finance of Russia, Ministry of Agriculture of Russia, Russian Alcohol Regulation, Federal Antimonopoly Service,

Federal Tax Service, Federal Customs Service, PJSC Sberbank of Russia, JSC Rosspirtprom,

JSC "Tatspirtprom", JSC "Rosagroleasing" and agricultural attache for embassies of Austria, Germany, Denmark, Belgium, Czech Republic

Having discussed the issue "Legislative and technical regulation of the activities of wineries and brewing enterprises, the issues of raw materials and staffing of the wine and beer product subcomplex of the agro-industrial complex of the Russian Federation," delegates of the X International Forum "Brewing Industry of the Russian Federation 2030 - A Look into the Future" (from now on referred to as the Forum) and members of the section "The development of viticulture, winemaking and the beer and soft drinks industry" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental Management note:

In the Russian Federation, over the past 25 years, a full-cycle strategy of "malting barley - beer" has been created and is successfully operating, combining the interests of science, breeders of malting barley, seed breeders, agricultural producers, traders, representatives of malt and brewing industries.

The concept of the strategy "brewing barley-beer" is to consolidate efforts aimed at the interaction of all interested parties to attract investment, introduce advanced scientific and technological solutions that contribute to improving the quality and safety of raw materials, materials, ingredients and the manufactured product - Russian beer.

Beer is at the same time food and alcohol products. By the total mass of production, beer is an absolute leader among alcoholic beverages, which shows its high consumer value. Absolutely natural is the increased attention of the state to these products and leads to the need for state regulation of the brewing industry at the national and interstate levels. Statistics show that the Russian Federation is able to supply raw materials to its brewing industry independently. In Russia, more than 2 million tons of malting barley and more than 1 million 200 thousand tons of malt are produced annually.

At the same time, the domestic brewing industry has over 1.7 thousand production facilities, including about 1 thousand small (craft) manufacturers, which together provide about 40 thousand people with jobs and create more than 300 thousand jobs in related industries. The total investment in the brewing industry over the past 25 years has amounted to more than 600 billion rubles, the level of excise taxes in regional budgets exceeds 150 billion rubles annually, the total contribution of the brewing industry to Russia's Gross Domestic Product is more than 850 billion rubles or about 0.8% of Russia's GDP.

In terms of annual beer production, Russia ranks sixth in the world, second only to the USA, China, Brazil, Mexico and Germany. Compared to 1995, beer production in the country has more than quadrupled and amounts to about 7.4 billion liters per year. Today on the Russian market there are all the world's largest beer manufacturers. According to the results of 2020, their share in our country is about 70% of beer production. At the same time, it is necessary to note the trend of recent years, which shows a significant increase in output by brewing companies with a Russian form of ownership, whose share has quadrupled over the past ten years. In 2020, the brewing industry approached the milestone when it was very likely to judge the saturation of the market and the need for the consolidated efforts of the state, business community and science aimed at preventing stagnation of the brewing industry.

An equally significant task discussed at the Forum was the development of viticulture and winemaking in the Russian Federation. The production of grape wine is an essential branch of the economies of many countries of the world, in which geographical and climatic conditions make it possible to grow grapes and produce wine from it. Russia possesses this unique complex of geographic and climatic features, but currently it uses only one-third of the 200 thousand hectares of land potentially suitable for viticulture.

Modern viticulture and winemaking is a socially significant branch of the agro-industrial complex that provides jobs in grape growing areas and solves many social issues. Especially noteworthy is the development of viticulture for the North Caucasus Federal District and the Southern Federal District, which are traditional regions for growing grapes and have historically been associated with this industry.

According to statistics, the average annual production of wine products in 2018 - 2019, amounted to: 32 million decaliters of wine; 13.5 million decalitres of sparkling (champagne) wines; 26 million decalitres of wine drinks; about 1 million gave unique wines; over 1 million decaliters of cognac distillates. In 2019, a harvest of 540 thousand tons was obtained at the level of 2018, in which grapes of industrial varieties make up 80 percent and table varieties 20 percent. Thus, out of 432 thousand tons of grapes of technical varieties in 2020, the industry will receive 32.4 million decalitres of grape wine material.

The delegates of the Forum and members of the section "Development of Viticulture, Winemaking and the Beer and Soft Drinks Industry" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental Management based on the results of the Forum decided:

1. To take into account the information contained in the speeches of the Forum delegates and the extended meeting of the section "Development of Viticulture, Winemaking and Beer and Soft Drinks" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy on this issue.
2. The Union of Russian winegrowers and winemakers, the Union of barley, malt, hops and beer and soft drinks producers, Moscow State University of Food Production to jointly organize and hold the XI International Forum in 2021: "Wine and Brewing Industries of Russia 2030 - A Look into the Future".
3. To members of the section "Development of Viticulture and Winemaking, the Beer and Soft Drink Industry" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental Management (specific individuals), continue monitoring the situation on the market of wine and brewing products of the Russian Federation with quarterly reports on this situation.
4. To ask the Federation Council Committee on Agro-Food Policy and Environmental Management to hold an expanded meeting of the Committee's Expert Council in the spring session of 2020 with the invitation of the representatives of the Ministry of Finance of Russia, the Ministry of Agriculture of Russia, the Federal Agency for Alcohol Regulation, the Federal Customs Service, the Federal Tax Service, the Federal Antimonopoly Service, and the Eurasian Economic Commission, Russian environmental operator on the central issues of the activity of

enterprises of the wine and brewing industry and related industries (see the position of the Forum delegates/list of topics).

5. Following the results of the extended meeting of the Expert Council of the Committee of the Council of the Federation on Agricultural and Food Policy and Environmental Management (Clause 4), request the Committee to hold a joint expanded meeting of the Committee on Agricultural and Food Policy and Environmental Management and the Budget and Financial Committee in the autumn session of 2020 markets (see the position of the Forum delegates/list of issues).
6. To ask the Federation Council Committee on Agrarian and Food Policy and Environmental Management to create a permanent working group on vocational education and advanced training for representatives of wineries and brewing enterprises.
7. Recommend the Moscow State University of Food Production Federal State Budgetary Educational Institution of Higher Education, together with the Union of Barley, Malt, Hops and Beer and Soft Drinkers Producers, with financial support from leading Russian manufacturers of beer and soft drinks based on a public-private partnership system, to start creating an analytical research laboratory based on MSUPP and experimental mini production of malt and beer.
8. Send the final resolution and position of the members of the section "Development of Viticulture and Winemaking, the Beer and Soft Drinks Industry" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental Management and the Forum delegates:
 - to the Deputy Chairman of the Government of the Russian Federation, the head of the apparatus of the Government of the Russian Federation D.Yu. Grigorenko;
 - To the Minister of Finance of the Russian Federation A.G. Siluanov;
 - Minister of Agriculture of the Russian Federation D.N. Patrushev;
 - To the head of the Federal Service for Regulation of the Alcohol Market I.O. Alyoshin;
 - To the head of the Federal Tax Service D.V. Egorov;
9. Request the Ministry of Agriculture of Russia, the Ministry of Finance of Russia, the Ministry of Industry and Trade of Russia, the Federal Service for Alcohol Market Regulation, the Federal Customs Service, the Federal Tax Service, the United Grain Company, Rusagrotrans, the Russian environmental operator, the Union of producers of malting barley, malt, hops and beer and soft drinks and the Union of Viticulture and Russian winemakers to take into account the position of the Forum delegates and members of the section "Development of viticulture and winemaking, beer and soft drinks industry" Expert Council that the Federation Council Committee on Agrarian and Food Policy and Environmental Management on the following issues:
 - when forming the state policy about the enterprises of the winemaking and brewing complex, it is necessary to create conditions and opportunities for a constructive dialogue between state authorities, science, business society to support industry representatives applying the full-cycle strategy for the production of "grapes - wine," "brewing barley - beer";
 - enterprises of the wine and brewing industry need affordable support mechanisms aimed at providing them with high-quality and competitive domestic raw materials (grapes, malting barley, malt, hops, etc.);
 - high-quality and competitive domestic raw materials and brewing and winemaking products made from it have great potential for export to the EAEU, CIS, and PRC countries. There is a need for domestic producers to study existing export support measures and expand the geography of exports of malting barley, malt, wine and brewing products;

- producers of brewing grain and beer, domestic brewing companies consider it necessary to initiate a procedure for amending the technical regulation of the Eurasian Economic Union No. 047/2018 "On the safety of alcoholic beverages" in terms of maintaining the current Russian legislation on the use of at least 80 percent of malt in beer production, as well as a change in the concept of "special beer";
 - for many years, the federal executive authorities have supported, but have not introduced, the current legislation to increase the sales of wine, sparkling wine (champagne), produced from own grapes by peasant (farmer) farms, individual entrepreneurs recognized by agricultural producers, from 5 to 15 thousand decalitres per year;
 - in the development and consideration of regulatory legal acts that establish restrictions on the activities of wineries and brewing industries or lead to changes in the information on consumer packaging, it is advisable to pay attention to setting a transitional period for the entry into force of these acts for at least one year (in terms of restrictive measures to reduce the capacity of PET packaging for brewing products to 0.5 l - a transition period of at least two years);
 - support measures are needed to be aimed at improving technical regulation and standardization, creating conditions for improving the quality, competitiveness, and safety of wine and brewing products, raw materials used in their production, through the development and updating of existing interstate and national standards, including methods identification of products that contribute to the fight against unfair competition and misleading consumers
10. to discuss with the members of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental Management in the form of a separate interagency meeting (from now on - the MLA):
- risks (conflict of legal acts) that may arise in connection with the entry into force of the EAEU technical regulation No. 047/2018 "On the safety of alcoholic beverages" and Federal Law of December 27, 2019 No. 468-FZ "On viticulture and winemaking in Russian Federation";
 - the possibility of establishing differentiated taxation (excise taxes) of enterprises by the volume of products for the period up to 2030 (on this issue there was no necessary quorum for the delegates of the Forum and the section "Development of Viticulture and Winemaking, Beer and Non-Alcohol Industry" of the Expert Council under the Federation Council Committee on agri-food policy and environmental management);
 - the suitability of introducing the Minimum Retail Price (MRC) for brewing products (there was no necessary quorum on this issue for delegates of the Forum and the section "Development of Viticulture and Winemaking, Beer and Soft Drinks" of the Expert Council under the Federation Council Committee on Agrarian and Food Policy and Environmental Management);
 - the feasibility of creating a register of brewing producers;
 - the results of the experiment of JSC Tatspiro on marking kegs for brewing products and to discuss the need for introducing particular federal brands (FSM) for brewing products;
 - Monitoring of the situation and analysis of the effectiveness of the installation of counters for accounting brewing products at small enterprises.

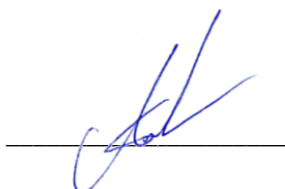
On behalf of and behalf of the delegates of the Forum and members of the section "Development of Viticulture and Winemaking, the Beer and Non-Alcohol Industry" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental Management:

Chairman of the section "Development of Viticulture and Winemaking, the Beer and Soft Drink Industry" of the Expert Council under the Committee of the Council of the Federation for Agrarian and Food Policy and Environmental

Management under the Council of the Federation of the Federal Assembly of the Russian Federation, Deputy Chairman of the Public Council of the Ministry of Agriculture of Russia A.N. Mordovin



President of the Union of Winegrowers and Winemakers of Russia, Chairman of the Technical Committee for Standardization TC 162 "Viticulture and Winemaking" L. L. Popovich



Deputy General Director of Rosspirtprom JSC, Chairman of the Technical Committee for Standardization TC 175 "Brewing and non-alcoholic beverages" A.B. Danilovtseva



Rector of Moscow State University of Food Production M.G. Balykhin



02/08/2020. Moscow





