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## **Russian Federation**

### **Sugar Annual**

### **New Crop Forecast Down 8% but Record in Any Other Year**

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**Report Highlights:**

FAS Moscow's record production forecast fell far short in 2011/12 as sugar production totaled 58% higher than the previous record and 84% higher than the previous year. In 2012/13, planted area is retreating but still allows for the second largest beet sugar production on record at over 5.0 MMT. Producer prices and adverse weather conditions in the South are driving reduced area. As a result, 2012/13 imports should bounce back from the very low totals being experienced in the current marketing year. Large sugar supplies in 2011/12 should allow Russia to become a net exporter of refined sugar for the first time since 2001/02 as well as carry this status forward into 2012/13.

## Executive Summary:

FAS Moscow's record production forecast fell far short in 2011/12 as sugar production totaled 58% higher than the previous record and 84% higher than the previous year. In 2012/13, planted area is retreating but still allows for the second largest beet sugar production on record at over 5.0 MMT. Producer prices and adverse weather conditions in the South are driving reduced area. As a result, 2012/13 imports should bounce back from the very low totals being experienced in the current marketing year. Large sugar supplies in 2011/12 should allow Russia to become a net exporter of refined sugar for the first time since 2001/02 as well as carry this status forward into 2012/13.

Table 1a. Russian Sugar Beets, Area, Production, and Utilization (1,000 HA, 1,000 MT)

Sugar Beets Russia	2010/2011		2011/2012		2012/2013	
	MY Begin: Jan 2011		MY Begin: Jan 2012		MY Begin: Jan 2013	
	Old Post	New Post	Old Post	New Post	Old Post	New Post
Area Planted	1,160	1,160	1,290	1,290		1,180
Area Harvested	910	910	1,210	1,200		1,120
Production	21,500	21,500	37,000	47,600		44,500
Total Supply	21,500	21,500	37,000	47,600		44,500
Utilization for Sugar	21,500	21,500	37,000	47,600		44,500
Total Distribution	21,500	21,500	37,000	47,600		44,500

Table 1b. Russian Sugar, Production, Supply, and Distribution (1,000 MT Raw Value)

Sugar, Centrifugal Russia	2010/2011		2011/2012		2012/2013	
	MY Begin: Oct 2010		MY Begin: Oct 2011		MY Begin: Oct 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	399	399	400	350		455
Beet Sugar Production*	2,996	2,996	4,800	5,500		5,050
Cane Sugar Production	0	0	0	0		0
Total Sugar Production	2,996	2,996	4,800	5,500		5,050
Raw Imports	2,600	2,260	1,400	750		1,000
Refined Imp.(Raw Val)	350	250	275	140		200
Total Imports	2,950	2,510	1,675	890		1,200
Total Supply	6,345	5,905	6,875	6,740		6,705
Raw Exports	0	0	0	0		0
Refined Exp.(Raw Val)	5	17	200	275		275
Total Exports	5	17	200	275		275
Human Dom. Cons.	5,925	5,523	6,230	5,995		6,015
Other Disappearance	15	15	15	15		15
Total Use	5,940	5,538	6,245	6,010		6,030
Ending Stocks	400	350	430	455		400
Total Distribution	6,345	5,905	6,875	6,740		6,705

\*New crop beet sugar production in August and September assumed to occur in October for PSD calculation.

## Production: Sugar Beets

### Sugar Beet Area

FAS Moscow forecasts sugar beet area in 2012 approximately 9% lower than 2011/12 and within the range of local market experts. Producer prices remain low from the 2011 bumper crop that overwhelmed the refiners. As well, the delayed planting season in the south is likely to shift some would-be sugar beet area to oilseeds. Under normal weather conditions, area loss is expected to return to 5%.

### Sugar Beet Production

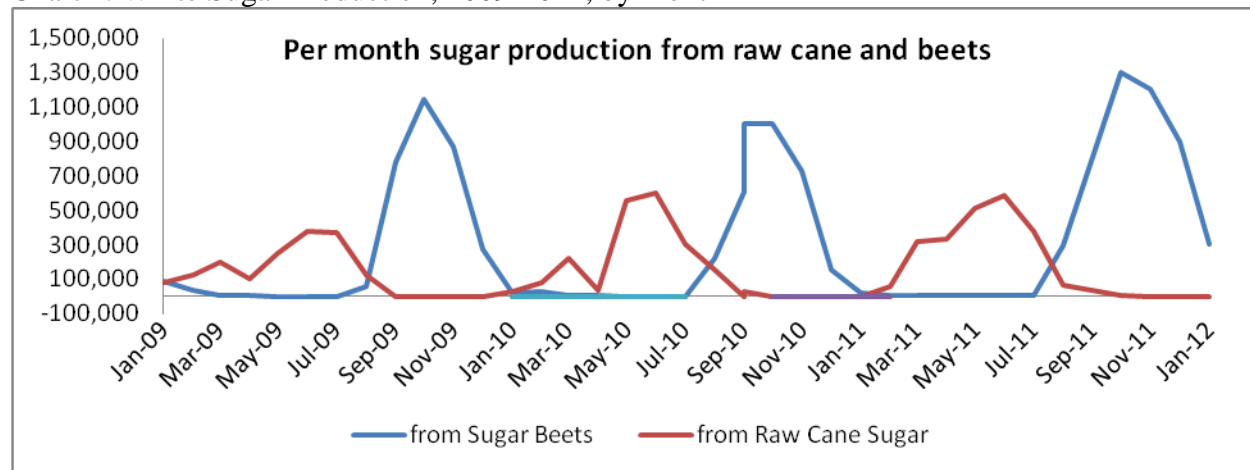
FAS Moscow's sugar beet production forecast is 6.5% lower in 2012/13 as compared to 2011/12. High sugar beet area in combination with favorable weather conditions in 2011/12 ultimately resulted in record sugar beet yield (39 MT/ha) and production (47.6 MMT). Nonetheless, yields close to 40 MT/ha are expected in 2012/13, following the five-year trend (excluding the 2010 disaster).

Sugar beet production in 2011, while a record, fell well short of its potential. Due to the large production and limited refining capacity, processors forced farmers to renegotiate contracts signed in May 2011 for RUR1,600-2,000/MT to RUR800-1,000/MT in October-November as well as move delivery dates from October to December and January. Of the 47.6 MMT harvested, only 41.1 MMT were delivered to the refineries, of which only 40.0 MMT were processed. Losses in the field after harvest and at Russian refineries were plagued by storage conditions, which included a heavy frost at the end of November and a warm December.

## Production: Sugar

Historically, beet processing occurs from August to January and raw sugar processing occurs from May to July. These two seasons may shift depending on raw material availability and raw sugar prices on the world market, and are accompanied by Russian Government intervention in the application of seasonal import duties. The Russian Government increased the window for low-duty raw sugar imports beginning in April or even March as occurred in 2009/10 and 2010/11; however, no such expectations are held for the current or forecast marketing year.

Chart 1. White Sugar Production, 2009-2012, by month



According to [RBC Market Research](#), about 70% of Russian sugar beets and raw sugar are processed by the following agricultural holdings: Prodimpex, Rasgulay, Rusagro, Dominant, Kunan Sugar Company, Sucden, and Cargill.

### Beet Sugar Production

In 2012/13, FAS Moscow forecasts beet sugar production to decrease 8%, following reduced area as well as assuming average sugar beet post-harvest losses of 19% and average sugar content of 12.9%.

In 2011/12, Russia produced a record 5.5 MMT of beet sugar. However, according to industry experts, refineries experienced high losses as limited refining capacities forced them to process beets with declining sugar content reaching as low as 7% in March.

The sugar industry also produced about 700,000 MT of granulated beet pulp in 2011/2012 (400,000 MT in 2010/2011). Beet syrup production accounted for 1.65 MMT in 2011/2012 (1.0MMT in 2010/2011).

### Sugar Industry Investment

New Russian refineries have not been constructed since the early 1980s and capacity upgrades have been slow. However, the sugar industry has become more attractive to investments since Russia launched the State Program “On Sugar Beet production Development in 2009-2012,” which envisaged state subsidies for the construction of new and renovation of existing sugar refineries. Federal financing for the sugar industry should stimulate the purchase of new machinery and equipment, improve production efficiency, and ultimately boost production while curbing preventable losses. Russia allocated RUR125.8 million in 2011 to subsidize interest rates for RUR4.5 billion in investment loans. In 2011, the Ministry of Agriculture approved three large projects valued at RUR1.0 billion and considered 12 more projects for construction or renovation of refineries and seed production plants.

Governors of several regions have stated they need new beet refineries to meet the needs of increased sugar beet production. However, the [Institute for Agricultural Market Studies](#) (IKAR) is not convinced these projects will be cost-efficient after Russia joins the WTO, having in mind that Russia is currently protected by high import duties on raw and white sugar. Some specific projects follow.

- The Voronezh Oblast Government offered an investor its support in construction of a new sugar beet refinery. According to preliminary data, about \$250 million will be invested starting in 2012. Construction will last for about three years. The refinery will be able to process 10,000 MT of beets per day. The investor plans to grow about 70% of the necessary beets at its own farms.
- The Rostov oblast Government reported that an oil company and the oblast Government will build a sugar beet refinery as well as livestock and dairy facilities where by-products of beet processing will be fed to cattle. The project will be completed in 2-3 years.
- The Stavropol Kray Government is considering providing support for a company which plans to invest €130 million into construction of a sugar refinery in 2013, of which 80% may be subsidized by the state budget. The plant plans to process beets for four months and produce syrup, ethanol, and dry pulp during the offseason.

### Sugar Standards

Custom Union Resolution #880 of December 2011 includes a list of voluntary standards (GOSTs) to ensure compliance of sugar products with the Technical Regulation “On food safety”.

### Other Sweeteners

Russia is also developing production of starch-based sweeteners, which are received mainly from corn (more than 80%), wheat (about 15%) and potatoes (about 3%). The utilization of corn is declining while the share of wheat is rising. Production of glucose from all types of starch increased from 491,500 MT in 2010 to 562,400 MT in 2011. The major producer of starch syrup is Cargill, which increased production from 284,000 MT in 2010 to 329,000 MT in 2011.

## **Trade**

### Imports: Raw Sugar

Raw sugar imports are forecast to reach only 1.0 MMT in 2012/13, roughly 13% more compared to a low raw sugar import total in 2011/12.

High beet sugar production in 2011/12 and an increased minimum seasonal import duty from May 1 to July 31 should limit further growth in the current year. Imports of raw sugar in the fourth quarter of 2011 was much smaller compared to the same period of 2010 when Russia needed raw sugar processing and white sugar for consumption. Russia imported 2,258,774 MT of raw sugar in MY 2010/11.

Brazil controls 80-85 percent of the historic market share for Russia’s raw cane sugar imports, while Thailand and Guatemala are also active market participants.

Historically, there are two scales of customs duties on raw sugar subject to Russia’s raw sugar suppliers. From May to July, the minimum duty has been \$50/MT. However, from August 1, 2012, in anticipation of the sugar beet harvest, the Customs Union has enhanced the protective mechanism of the sugar market, in accordance with Russia’s looming WTO Accession, by increasing minimum duties to \$140/MT as well as setting the maximum at \$270/MT. Customs Union Decision #913 of January 25, 2012, also increased the seasonal import duty on raw sugar from \$50/MT to 140/MT from May 1 to July 31, 2012. The sugar consuming industry opposed the move as it would the increase white sugar price by more than 30%.

According to Russia’s WTO Accession, Russia is obliged to reform its tariff regime for sugar in 2012, with a view to further liberalization after WTO accession. However, according to the Russian Ministry of Economic Development (MED), the formula for raw sugar import duty will be the same after Russia’s WTO accession, indexed to the New York Mercantile Exchange. MED noted that parameters of further liberalization have not yet been prescribed since the sugar negotiations ended in 2006, and therefore, Russia will only be in a position to discuss liberalization after 2012.

### Imports: Refined Sugar

FAS Moscow expects Russian refined sugar imports to increase to 200,000 MT Raw Equivalent in 2012/13, also countering lower beet sugar production.

FAS Moscow decreased the estimate for refined sugar imports in 2011/12 on higher than expected sugar beet production and limited imports to date.

The historical refined sugar suppliers are Belarus, Moldova, Brazil, and the European Union.

#### *Imports from Belarus*

On November 30, 2011, the Russian and Belarusian Ministries of Agriculture agreed that Belarus would be allowed to ship Russia 200,000 MT of refined beet sugar in CY 2012, the same amount as in CY 2011. However, according to Russia's State Statistical Service (Rosstat), CY 2011 Belarus exports to Russia eventually totaled 192,600 MT, 1.6% more compared to CY 2010.

#### *Imports from Ukraine*

Russian sugar producers have requested the CU apply protective measures on sugar imports from Ukraine to limit alleged "dumping" of Ukrainian exports. According to the Association of Sugar Producers of the Customs Union, Ukraine is able to produce below cost enabling them to export sugar to Russia at the full \$340/MT duty because of Ukraine's 2% import duty on raw sugar.

Trade statistics from Ukraine (Oct-Dec) and the Association (Jan-Mar) also indicate Ukraine allegedly exported Russia 14,300 MT of white sugar in the current marketing year, none of which is reported by the Russian Federal Customs Service. However, it is possible at least a portion of this total may be reported as Belarusian origin by Rosstat. In doing so, the Association believes Ukraine is circumventing the Russian import duty via its free-trade agreements with Belarus and Kazakhstan. Russia eliminated its free trade regime on sugar with Ukraine more than 10 years ago. The latest bilateral protocol excluding sugar from the free trade regime was signed between Russia and Ukraine on January 1, 2009 and remains active through December 31, 2012.

In the near future, the 2011 Commonwealth of Independent States (CIS) Free Trade Agreement is expected to be ratified by Ukraine and the Customs Union, and it enters into force 30 days after the first three countries ratify. Russia is the first and only country to yet do so. However, since sugar is one of the very few products excluded from the FTA, the Association hopes it can serve as a mechanism to stop sugar trade into partners.

#### Exports: Refined Sugar

FAS Moscow forecasts Russian refined sugar exports in 2012/2013, to reach 275,000 MT Raw Equivalent, the same as in 2011/2012.

Russia wishes to increase exports of agricultural commodities and considers itself a major supplier of white sugar to CIS member countries, regardless of its competitiveness. As recent years have proved, Russia's capability and competitiveness to fulfill these wishes has been very erratic. Russia exported a record low 17,000 MT of refined sugar in 2010/2011 and is likely to export a record high 275,000 MT in 2011/2012. In the first quarter of 2011/12, Russia exported 57,177 MT of white sugar, with almost all sugar destined for CIS partners.

According to IKAR, Russia exported 400,000 MT of beet syrup (90,000 MT in 2010/2011) and 500,000 MT of granulated pulp (255,000 MT in 2010) by the end of February 2012. Exports could reach 550,000 MT and 600,000 MT accordingly during the current marketing year.

## **Consumption**

FAS Moscow forecasts human domestic consumption with slight growth in 2012/13 on improved macro-economic indicators which should counter prospects for sustained high sugar prices. Ultimately, despite Russia's increasing domestic sugar production, production costs under the current sugar regime of less access for raw sugar with a focus on increasing market share of less competitive local beet sugar production holds back potential for robust consumption growth.

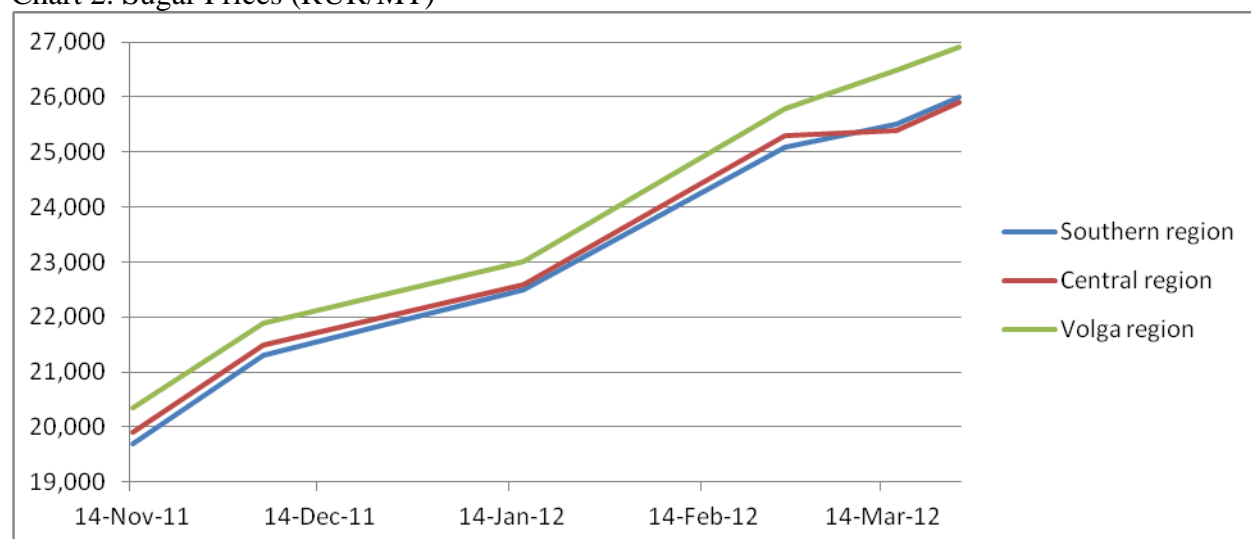
Looking forward, in addition to improving macro-economic indicators, the Russian Duma Agrarian Committee is considering a State Program "Strategy of Development of Food and Processing Industry of the Russian Federation until 2020," which was recently submitted by the Ministry of Agriculture. In total, the Ministry is proposing a RUR724.3 billion investment into the industry. The largest allocation of which – RUR107.7 billion – is designated for the development of the sugar processing industry. It also proposes to allocate RUR79.9 billion for the candy-making industry as well as RUR25.6 billion for the starch and syrup industry.

Per capita consumption of starch derived sweeteners is 5.5 kilogram, of which 56% is utilized for candies and soft drinks production and 19% for other food products in CY 2011. The rest is applied for non-food products.

### Prices

White sugar prices have remained high despite record sugar production and prospects for another productive year in 2012. Considering the strict market access regime in place, sugar prices above RUR30/kg through the remainder of 2011/12 and into 2012/2013 are a likely reality. While the record high prices of early 2011 began to subside with raw sugar imports and early prospects of a record 2011 harvest, the decline was shallow and relatively short-lived, as prices again started to climb higher as soon as it was evident refineries were facing financial losses due to capacity bottlenecks. While additional supplies were available, the major sugar producers held them back to in order to prop up prices. According to Rossahar, wholesale white sugar prices increased from RUR18.6/kg at the beginning of November to RUR 24.9/kg at the end of November, and reached RUR25/kg by the end of December and continue to climb through March. As opposed to past years, no reduced import duty for raw sugar is expected to further relieve the sugar market.

Chart 2. Sugar Prices (RUR/MT)



Source: Rossahar

## Sugar Production Tables

Table 2. Russian Sugar Beet Area, Production, and Prices

	2000/01	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
Area planted, 1,000 Ha	805	799	996	1,060	819	819	1,160	1,290
Area harvested, 1,000 Ha*	750	755	944	986	801	778	925	1,214
Area harvested, %*	93	94	95	93	98	95	79	94
Sugar beets harvest, MMT	14.1	21.3	30.7	28.8	29.0	24.9	22.3	47.6
Yield, MT/Ha	18.8	28.2	32.5	29.2	36.2	32	24.1	39.2
Sugar beets marketed, MMT	n/a	17.9	23.3	24.2	24.6	20.9	19.1	n/a
Sugar beets marketed, %	n/a	84.8	76.1	84.7	86.3	93.4	87.5	n/a
Beet prices, RUR/MT	509	965	1,165	1,071	1,163	1,242	1,636	n/a

Source: Rosstat

\* FAS Moscow calculation

Table 3. Russian Sugar Beet Area by Category, CY 2011/12

	Total	Including		
		Agricultural farms	Private farms	Private households
Area, planted, million Ha	1.29	1.10	0.18	0.07
Area harvested, million Ha,*	1.21	1.05	0.16	0
Area loss, %*	6.2	4.5	10	N/A
Beet Harvest, MMT	47.6	41.2	6.3	0.23
Yield MT/Ha	39.2	39.3	38.9	30.7

Source: Rosstat \*Calculated by FAS



Table 4. Russian Production and Processing of Sugar Beets and Beet Sugar, MMT

	2010/11	2011/12	12/11, %
Sugar beet production	20.6	41.1	199.3
Sugar beet processed	20.0	39.8	197.8
White beet sugar production	2.7	5.0	184.4

Source: Rossahar

Table 5. Russian Sugar Standards

Standards	Commodity	Regulation
GOST 21-94	Fine regular granulated sugar	Technical conditions
GOST P 53396-2009	White sugar	Technical conditions
GOST 1882-208	Raw sugar	General Technical conditions

Source: Customs Union <http://www.tsouz.ru/db/techreglam/Documents/TR%20TS%20PishevayaProd.pdf>

## Sugar Trade Tables

Table 6. Russian Imports, Raw Sugar (170111, 170112), MT

Partner Country	2008/09	2009/10	2010/11	Oct – Dec	
				2010	2011
World	1,763,070	1,948,606	2,258,774	169,725	2,582
Brazil	1,489,518	1,636,819	1,954,788	147,138	180
Thailand	57,708	40,830	123,566	0	0
Guatemala	0	64,515	64,146	0	0
Cuba	142,762	80,863	45,800	0	0
Nicaragua	0	0	25,740	0	0
Honduras	0	0	16,834	0	0
Argentina	0	40,643	20,500	20,500	0
Mauritius	827	3,965	5,786	1,650	1,904

Source: GTIS

Note: Belarus is excluded in the entire time series; Kazakhstan is excluded since July 2010

Table 7. Russian Imports, Refined Sugar (170191, 170199), MT

Partner Country	2008/09	2009/10	2010/11	Oct – Dec	
				2010	2011
World (Raw value)	258,065	274,641	278,617	93,321	47,919
World	237,411	252,663	256,317	85,852	44,084
Belarus	146,000	180,000	170,000	42,600	39,800
Moldova	30,993	5,742	25,332	23,287	0
Brazil	18,666	3,786	24,038	7,076	3,711
Poland	16,465	36,570	13,285	8,108	5,552
France	1,576	90	9,491	26	21

Source: GTIS, Rosstat Note: Kazakhstan is excluded since July 2010

Table 8. Russian Exports, Refined Sugar (170191, 170199), MT

Partner Country	2008/09	2009/10	2010/11	Oct – Dec	
				2010	2011
World (Raw value)	160,904	34,255	18,402	493	62,151
World	148,026	31,513	16,929	454	57,177
Tajikistan	38,382	10,634	4,732	11	20,980
Kyrgyzstan	2	2	4,246	0	8,084

Uzbekistan	71,738	1,049	3,198	10	6,545
Moldova	3	3	2,382	2,380	741
Turkmenistan	13,677	5,227	1,031	6	5,864
Mongolia	540	691	743	170	195
Abkhazia	4,114	1,260	399	293	885
United States	40	122	119	27	114
Kazakhstan	1,527	12,069	n/a	n/a	n/a

Source: GTIS Note: Belarus is excluded in the entire time series; Kazakhstan is excluded since July 2010

## Consumption Tables

Table 9. Russian Wholesale Sugar Price, RUR/MT

Date	Southern region	Central region	Volga region
November 14, 2011	19,700	19,900	20,350
December 5, 2011	21,300	21,500	21,900
January 16, 2012	22,500	22,600	23,000
February 27, 2012	25,100	25,300	25,800
March 16, 2012	25,500	25,400	26,500

Source: Rosstat

Table 10. Russian Average Sugar Price, RUR/kg

	200 0	200 1	200 2	200 3	200 4	200 5	200 6	200 7	200 8	200 9	201 0	201 1	201 2
Jan	9.3 0	15. 91	15. 18	19. 83	18. 63	19. 60	21. 90	22. 42	22. 03	25. 76	35. 98	43. 64	29. 90
Feb	9.1 7	16. 18	15. 15	20. 42	18. 63	19. 50	28. 54	22. 05	22. 78	27. 94	37. 22	44. 28	30. 94
Mar	8.8 8	15. 97	15. 00	20. 70	18. 78	19. 58	29. 45	21. 57	23. 28	29. 71	36. 57	43. 31	n/a
Apr	8.9 4	15. 52	14. 82	20. 62	18. 93	19. 61	27. 28	21. 41	23. 50	29. 75	34. 53	41. 27	n/a
May	9.8 7	15. 53	14. 96	20. 39	19. 08	19. 70	26. 15	21. 39	25. 09	29. 49	32. 82	39. 65	n/a
Jun	12. 21	15. 44	15. 03	20. 16	19. 13	20. 00	25. 82	21. 66	25. 38	29. 62	32. 01	38. 66	n/a
Jul	12. 82	15. 58	17. 71	20. 08	20. 85	20. 68	27. 87	21. 92	25. 02	29. 68	34. 13	39. 31	n/a
Aug	13. 74	15. 72	17. 44	19. 90	21. 10	20. 68	28. 03	23. 47	24. 86	31. 53	35. 73	38. 67	n/a
Sep	14. 63	15. 45	17. 23	19. 26	20. 70	20. 17	27. 20	22. 70	24. 20	34. 86	37. 52	34. 84	n/a
Oct	16. 56	15. 20	17. 99	18. 50	20. 25	19. 89	24. 64	22. 23	23. 61	33. 07	37. 56	32. 66	n/a
Nov	15. 97	14. 92	18. 91	17. 73	19. 86	19. 76	23. 17	21. 86	23. 26	32. 90	39. 27	31. 19	n/a
Dec	15. 62	14. 88	19. 47	18. 34	19. 69	19. 69	22. 71	21. 63	23. 07	33. 02	40. 62	30. 22	n/a

Source: Rosstat

Table 11. Russian Average Wholesale Sugar and Sweetener Prices, RUR/kg

Commodity	2010				2011			
	QI	QII	QIII	QIV	QI	QII	QIII	QIV
Sugar	n/a	n/a	29.5	24.8	27.6	33.4	28.7	18.8

Starch syrup	12.8	13.4	13.8	15.7	16.6	16.8	17.2	16.1
Glucose-Fructose Syrup	n/a	16.0	17.0	16.5	21.0	23.0	21.0	17.0

Source: "CIS Sugar Market 2012" Conference of All-Russian Scientific Research Institute of Starch Products

Table 12. Russian Processor Prices for Syrup and Granulated Pulp, RUR/MT

Date	Syrup	Granulated pulp
December 15, 2011	300 – 400	2,500 – 3,500
December 5, 2011	600 – 1,500	3,500 – 4,000
November 23, 2011	600 – 1,500	3,500 – 4,000

Source: Rossahar

## Other Sweetener Tables

Table 13. Russian Starch Syrup Products Supply, 1,000 MT

Products	2007	2008	2009	2010	2011
Starch syrup (glucose syrups of all types)	425.3	448.0	446.1	491.5	562.4
Imports	65.6	42.8	18.7	22.5	38.8
Exports	0.2	0.240	4.7	11.5	2.9
Total supply	490.7	490.6	460.1	504.0	599.3

Source: "CIS Sugar Market 2012" Conference of All-Russian Scientific Research Institute of Starch Products

Table 14. Russian Producers of Starch Syrup Products, 1,000 MT

Products	2007	2008	2009	2010	2011
Starch syrup (glucose syrups of all types)	425.3	448.0	446.1	491.5	562.4
--OAO Cargill	269.8	260.7	233.7	284.0	329.2
--OAO Ibredkrakmalpatoka	40.8	37.3	43.5	42.9	39.1
--OAO Starch and syrup plant Novlyanskiy	37.2	41.1	39.1	35.9	36.6
--OAO Khobotovo plant "Starch products"	30.3	36.2	39.0	40.4	43.2
--OAO Starch plant "Gulkevichy"	15.9	33.3	38.4	34.4	36.3
--OAO "Kazatskiy KPK"	24.8	30.7	32.4	6.3	-
--OAO Beslan Maisoviy facility	1.2	-	2.5	3.5	11.7

Source: "CIS Sugar Market 2012" Conference of All-Russian Scientific Research Institute of Starch Products