



GIIEWS Country Brief

The Russian Federation

Reference Date: 21-January-2022

HIGHLIGHTS

- Improved weather conditions in late 2021 benefited soil moisture for 2022 winter crops
- Below-average cereal production obtained in 2021
- Total cereal exports forecast slightly below average in 2021/22
- Export and domestic prices of wheat slightly declined last December after steeply increasing between July and November

Improved weather conditions in late 2021 benefited soil moisture for 2022 winter crops

Planting of the 2022 winter cereal crops, mostly wheat and barley to be harvested from July, took place last October. The area sown is officially estimated at 18.4 million hectares, slightly above the average level, but well below the planned area of 19.5 million hectares, due to low soil moisture levels in the main producing Volga and Central federal districts, which delayed planting operations. Increased precipitation amounts in November and December improved soil moisture levels, with a positive impact on crop establishment.

Planting of the 2022 spring crops, mostly wheat and maize to be harvested from August, is expected to begin in April.

Below-average cereal production obtained in 2021

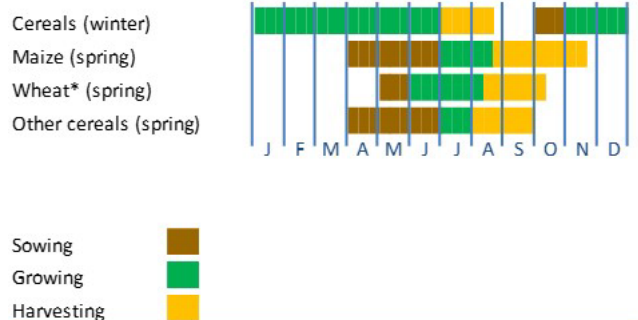
Harvesting of the 2021 winter cereal crops finalized last August, while harvesting of the 2021 spring crops, mainly wheat and maize, was completed last November.

The aggregate 2021 cereal output (winter and spring crops) is set at 116.9 million tonnes, 14 percent below the five-year average level. According to preliminary official data, the 2021 output of wheat is estimated at 75.9 million tonnes, about 10 percent below the previous year's level and slightly below the average, despite large plantings. The result is due to colder and drier-than-average weather conditions in March and April 2021, which caused winterkill in some snow-free areas of the key winter wheat producing Southern district, resulting in an overall decrease in yields. Production of barley is preliminarily officially estimated at 17.9 million tonnes, 8 percent below average due unfavourable weather conditions, which affected yields. By contrast, the output of maize is set at about 14.7 million tonnes, 7 percent above the

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Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

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Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	78 367	85 896	75 940	-11.6
Barley	19 402	20 936	17 900	-14.5
Maize	13 625	13 879	14 648	5.5
Others	9 985	9 464	8 365	-11.6
Total	121 379	130 175	116 853	-10.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

average level due to large plantings and overall favourable weather conditions during the season in the main producing areas.

Total cereal exports forecast slightly below average in 2021/22

A floating export duty system for wheat, maize and barley has been in force since 2 June 2021, replacing the system of flat export duties enacted in late January 2021 ([FPMA Food Policy](#)). In addition, on 17 December 2021, an 11 million tonnes quota on cereals exports to countries outside the Eurasian Economic Union (EAEU) was approved for the period between 15 February and 30 June 2022. The quota on exports of wheat and meslin was set at a total of 8 million tonnes, while the quota on aggregate exports of barley, maize and rye was set at 3 million tonnes ([FPMA Food Policy](#)). These measures aim to guarantee adequate availabilities of basic foodstuffs in the domestic market and prevent price increases.

Following the 2021 reduced output, wheat shipments, accounting on average for 80 percent of the total cereal exports, are forecast at 34 million tonnes, slightly below the five-year average volume. Similarly, barley exports are expected at below-average 4.3 million tonnes. By contrast, maize exports are foreseen at slightly above-average level of 4.5 million tonnes. As a result, aggregate cereal exports in the 2021/22 marketing year (July/June) are forecast at about 43 million tonnes, slightly below the five-year average volume.

Export and domestic prices of wheat slightly declined last December after steeply increasing between July and November

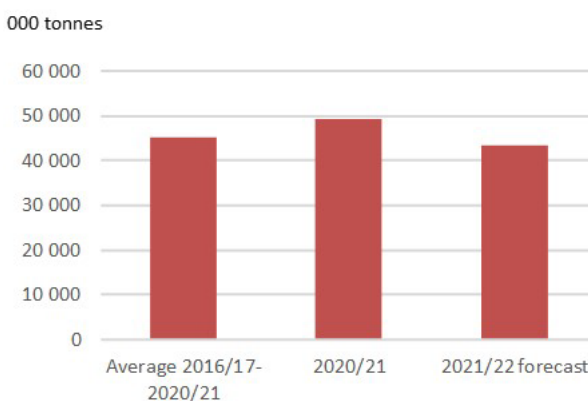
Export prices of milling wheat increased sharply between July and November 2021, mirroring prevailing trends in the international market and owing to strong buying interest from importing countries and limited supplies of high-quality milling wheat at the global level. Concerns about the impact of low soil moisture levels on the 2022 crops in parts of North America and the Black Sea region, coupled with rumours on the possible introduction of a quota on Russian wheat exports in 2022 (recently confirmed), provided further upward pressure. In November, prices reached the highest levels since March 2013. In December, export prices of milling wheat declined slightly, reflecting improved prospects for the 2022 wheat crop in the country, but remained about 30 percent higher than a year before, amid the harvest of a year-on-year lower output.

Domestic wholesale prices of milling wheat also sharply increased between July and November 2021, and reached record high levels (in nominal terms). Prices slightly declined last December, but remained about 5 percent above their year-earlier levels.

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Cereals Exports

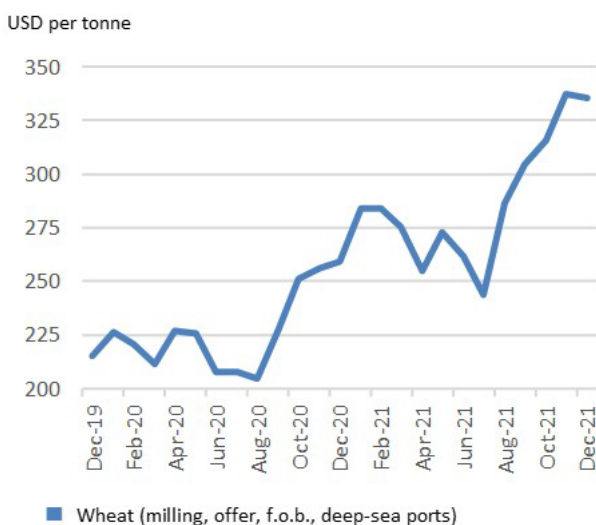


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

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Export price of milling wheat

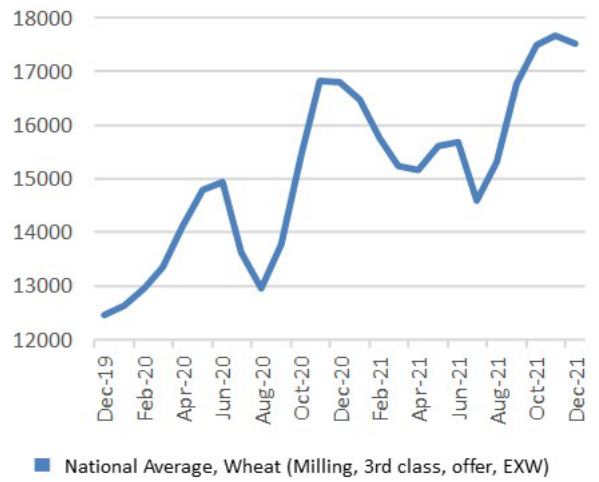


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Wholesale price of milling wheat

Russian Ruble per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief

The Russian Federation

Reference Date: 26-July-2021

HIGHLIGHTS

- Slightly above-average cereal production forecast in 2021
- Total cereal exports forecast above average in 2021/22
- Export prices of wheat declined in June 2021 following improved production prospects

Slightly above-average cereal production forecast in 2021

Harvesting of the 2021 winter cereal crops, mostly wheat and barley, is ongoing, while planting of the 2021 spring crops, mainly wheat and maize to be harvested from August, finalized in June.

Colder and drier-than-average weather conditions in March and April 2021 caused winterkill in some snow-free areas of the key winter wheat producing Southern District. Abundant rainfall in May and early June increased soil moisture levels across most crop lands, benefitting yields of winter crops and promoting planting activities of spring cereals.

The total area planted with wheat, including winter and spring crops, is estimated at 29.9 million hectares and the aggregate 2021 wheat output is officially forecast at 81 million tonnes, 3 percent above the five-year average. Barley and maize outputs are expected at above-average levels of about 20 million and 15 million tonnes, respectively, due to large plantings.

As a result, the total 2021 cereal production is forecast at about 125 million tonnes, 4 percent above the five-year average.

Total cereal exports forecast above average in 2021/22

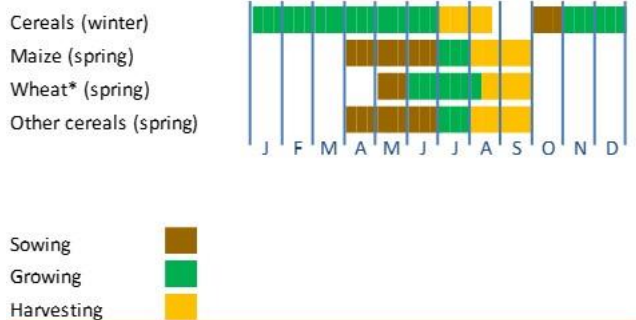
A floating export duty system for wheat, maize and barley has been in force since 2 June 2021, replacing the system of flat export duties enacted in late January 2021 ([FPMA Food Policy](#)). In addition, on 30 April 2021, a ban on buckwheat exports was introduced for the period between 5 June to 31 August 2021 ([FPMA Food Policy](#)). These measures aim to guarantee adequate availabilities of basic foodstuffs in the domestic market and prevent price increases.

However, owing to strong demand from importing countries and the expectation of a large wheat output in 2021, wheat

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Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

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Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
000 tonnes				
Wheat	78 367	85 896	81 000	-5.7
Barley	19 402	20 936	20 000	-4.5
Maize	13 625	13 879	15 000	8.1
Others	9 985	9 463	9 045	-4.4
Total	121 379	130 175	125 045	-3.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

shipments, accounting on average for 80 percent of the total cereal exports, are early forecast at 38 million tonnes, well above the average level. Maize and barley exports are foreseen at slightly above-average levels of 4.5 and 5 million tonnes, respectively. As a result, aggregate cereal exports in the 2021/22 marketing year (July/June) are forecast at about 48 million tonnes, 6 percent above the five-year average volume.

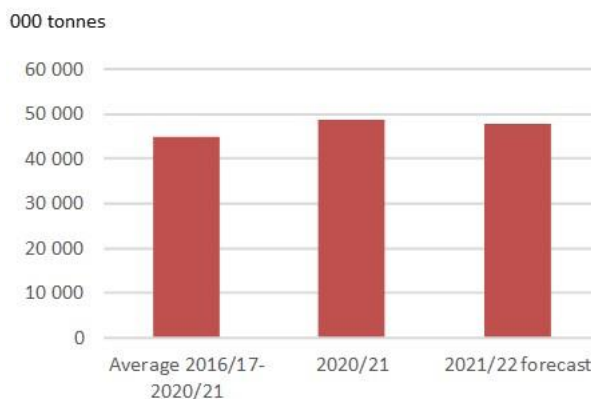
Export prices of wheat declined in June 2021 following improved production prospects

Export prices of milling wheat decreased by about 10 percent between February and April 2021, mainly due to a weakening of demand by importing countries. Prices then increased by 7 percent in May, reflecting concerns over the impact of dry weather conditions on the 2021 wheat production in the country as well as in the United States of America and Europe, that put upward pressure on international prices. Finally, prices declined again in June, mainly due to improved production prospects for domestic wheat, but remained about 26 percent higher than a year earlier.

Domestic wholesale prices of milling wheat declined between December 2020 and April 2021, and then increased slightly in the following two months, reaching, in June, levels of about 5 percent above their values a year before.

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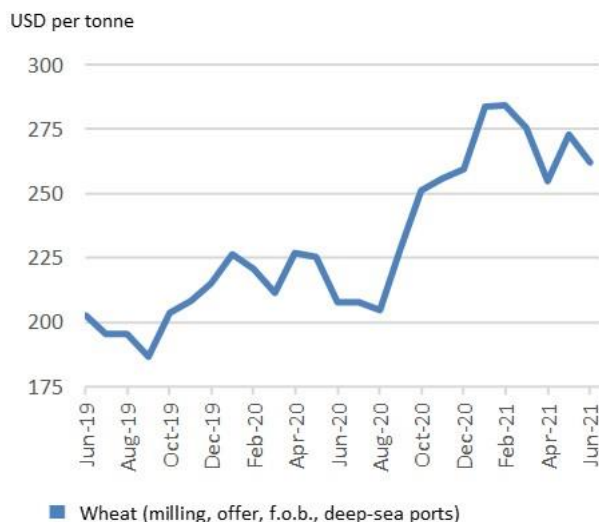
Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

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Export price of milling wheat

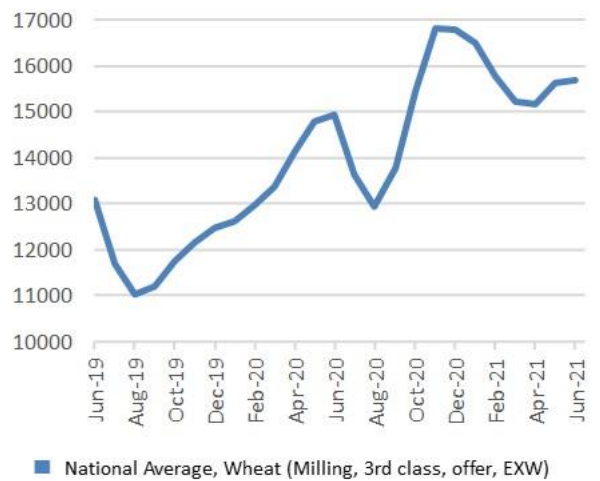


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Wholesale price of milling wheat

Russian Ruble per tonne



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIIEWS Country Brief

The Russian Federation

Reference Date: 17-March-2021

HIGHLIGHTS

- Improved weather conditions in early 2021 benefited soil moisture for winter crops
- Above-average cereal production obtained in 2020
- Total cereal exports forecast above average in 2020/21
- Export prices of wheat increased until January and stabilized in February

Improved weather conditions in early 2021 benefited soil moisture for winter crops

Planting of the 2021 winter crops, mostly wheat and barley, was completed last October and the area sown is set at an above-average level of about 19 million hectares. Warmer and drier-than-average weather conditions in December 2020 raised concerns for crop development, but abundant snow and rainfall amounts in January and February 2021 improved soil moisture levels.

Planting of the spring crops, mostly wheat and maize to be harvested in August and September, is expected to begin in April. The area planted with spring wheat is expected at a below-average level as a consequence of the introduction of a floating tax on wheat exports, from 2 June 2021, which would reduce the crop's profitability ([FPMA Food Policy](#)).

Above-average cereal production obtained in 2020

Harvesting of the 2020 cereal crops was completed last September and the aggregate cereal output is estimated at about 130 million tonnes, 13 percent above the five-year average. Following record high plantings, wheat and maize outputs are officially set at above-average levels of about 86 and 14 million tonnes, respectively. Barley production is estimated at 21 million tonnes, 10 percent above the average due to high yields.

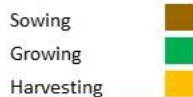
Total cereal exports forecast above average in 2020/21

Aggregate cereal exports in the 2020/21 marketing year (July/June) are forecast at 47.4 million tonnes, 12 percent above the five-year average volume. Wheat shipments, accounting on average for 80 percent of the total cereal exports, are forecast at 39 million tonnes, well above the average level on account of the

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Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Russian Federation

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	73 550	74 453	85 896	15.4
Barley	18 724	20 489	20 936	2.2
Maize	13 484	14 282	13 879	-2.8
Others	10 077	8 632	9 464	9.6
Total	115 835	117 856	130 175	10.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

large output obtained in 2020 and strong demand from importing countries. Barley exports are foreseen at 5.5 million tonnes, slightly above the five-year average.

On 14 December 2020, the Ministry of Economy set a 17.5 million tonne quota on exports of wheat, maize, barley and rye to countries outside the Eurasian Economic Union (EAEU), for the period from 15 February to 30 June 2021, with the aim of ensuring adequate domestic availabilities and halt a sustained upward trend in domestic prices ([FPMA Food Policy](#)). With the same purpose, a series of taxes on exports of wheat, maize and barley were introduced since late January 2021 ([FPMA Food Policy](#)).

Export prices of wheat increased until January and stabilized in February

Export prices of milling quality wheat increased between September 2020 and January 2021, mainly due to strong demand by importing countries. Prices remained stable in February as the upward pressure on prices provided by the announcement of the introduction of the floating tax on wheat exports was outweighed by the strong competition in the export market. Prices in February were at levels 30 percent above those a year earlier.

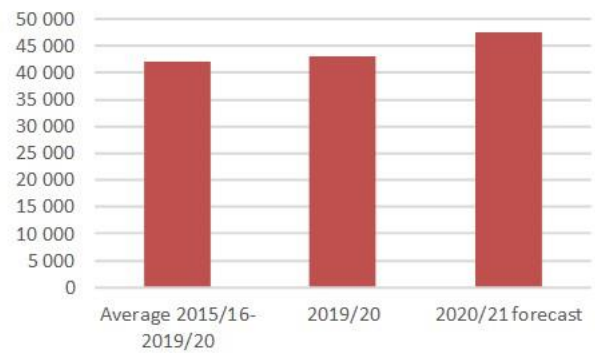
In the domestic market, wholesale prices of milling wheat slightly declined between December 2020 and February 2021 but remained well above their year-earlier levels. A year-on-year weaker local currency contributed to the annual increase of both export and domestic prices.

Retail prices of potatoes, another important food staple, have been following seasonal trends: after decreasing between July and October 2020, they increased from November 2020 to February 2021, reaching levels well above those a year earlier.

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Cereals Exports

000 tonnes



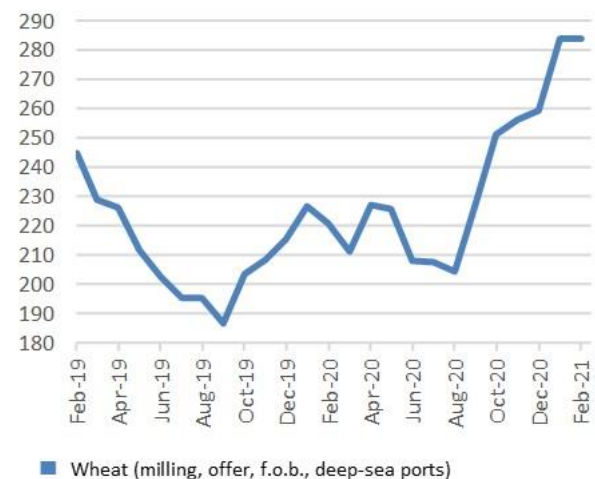
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

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Export price of milling wheat

USD per tonne



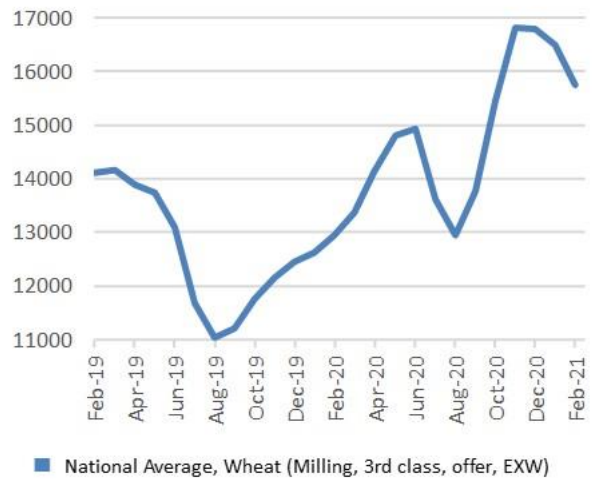
■ Wheat (milling, offer, f.o.b., deep-sea ports)

Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Wholesale price of milling wheat

Russian Ruble per tonne

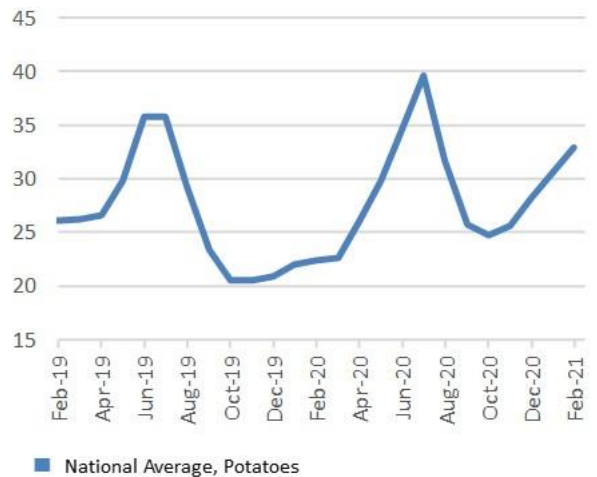


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Retail prices of potatoes

Russian Ruble per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief The Russian Federation

Reference Date: 20-October-2020

HIGHLIGHTS

- Dry weather conditions likely to have negative effects on 2021 winter crops
- Above-average cereal production obtained in 2020
- Total cereal exports forecast above average in 2020/21
- Export prices of wheat increased in September

Dry weather conditions likely to have negative effects on 2021 winter crops

Planting of the 2021 winter crops, mostly wheat and barley, is ongoing under drier-than-average weather conditions and the area planned to be sown is officially set at an above-average level of 19 million hectares. Precipitations were scarce in September and almost absent in the first dekad of October (see satellite image on rainfall anomaly) in the key wheat and barley producing Southern and North Caucasian Federal districts. According to the European Centre for Medium-Range Weather Forecasts (ECMWF), in these areas, rainfall amounts are forecast to remain at well below-average levels until the end of October, with likely negative effects on the establishment and early development of crops.

Above-average cereal production obtained in 2020

Harvesting of the 2020 cereal crops was completed in September and the aggregate cereal output is estimated at about 126 million tonnes, 8 percent above the five-year average. Following record high plantings, wheat and maize outputs are set at above-average levels of 82 and 14 million tonnes, respectively. Similarly, barley production is estimated at 20 million tonnes, 5 percent above average due to high yields.

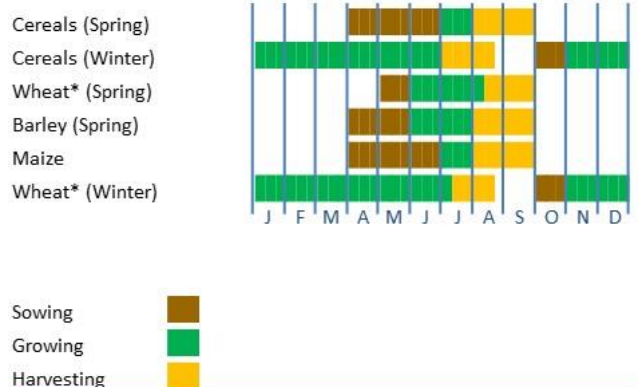
Total cereal exports forecast above-average in 2020/21

Aggregate cereal exports in the 2020/21 marketing year (July/June) are forecast at about 48 million tonnes, 14 percent above the five-year average volume. Wheat shipments, accounting on average for 80 percent of the total cereal exports, are forecast at 38 million tonnes, well above the average level on account of the large output obtained in 2020 and strong demand from importing countries. Similarly, barley exports are foreseen at 5.5 million tonnes, slightly above the five-year average, while

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Crop Calendar

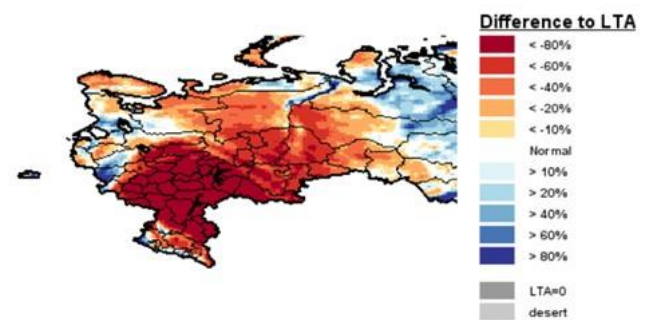
(*major foodcrop)



Source: FAO/GIEWS.

Russian Federation - Precipitation anomaly

Relative difference to LTA - Dekad 1, October 2020



Source: FAO/GIEWS Earth Observation System.

maize shipments are forecast at a slightly below-average level of 4 million tonnes.

In response to the COVID-19 pandemic, on 27 March 2020, the Government set a 7 million tonnes export quota on wheat, maize, barley and rye to the countries outside the EurAsian Economic Union (EAEU) for the period 1 April to 30 June 2020 with the aim of ensuring adequate domestic availabilities. On 28 September 2020, the Ministry of Agriculture announced the possibility of the introduction a new grain export quota for the second half of the 2020/21 marketing year (January-June 2021).

Export prices of wheat increased in September

After decreasing sharply in June 2020 with the start of the winter harvest, export prices of milling quality wheat declined slightly in the following two months and increased in September, mirroring the trends in the international market. The recent increase is mainly due to strong demand for wheat from the importing countries and concerns at regional level regarding production prospects of the 2021 winter wheat crops due to ongoing dry weather conditions.

In the domestic markets, wholesale prices of milling wheat decreased seasonally between June and August 2020 and increased in September.

Retail prices of potatoes, another important food staple, after seasonally increasing between March and July 2020, declined strongly in August and September with the arrival on the markets of the recently harvested tubers.

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Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	73 550	74 453	82 000	10.1
Barley	18 724	20 489	20 000	-2.4
Maize	13 484	14 282	14 000	-2.0
Others	10 077	8 630	9 692	12.3
Total	115 835	117 854	125 692	6.7

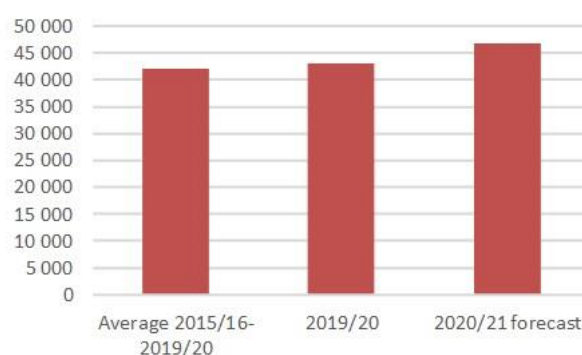
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Russian Federation

Cereals Exports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Russian Federation

Export price of milling wheat

USD per tonne



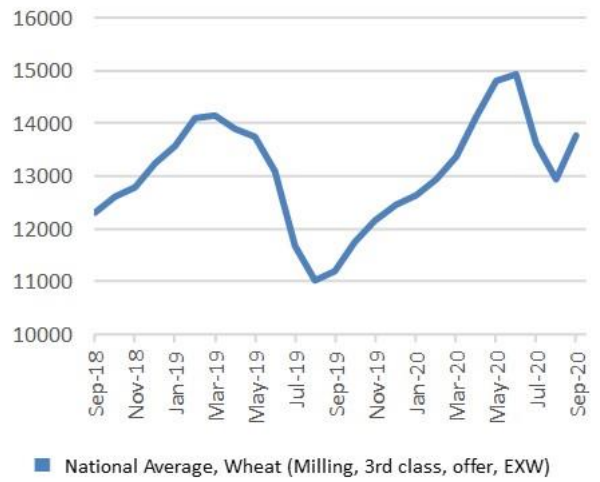
■ Wheat (milling, offer, f.o.b., deep-sea ports)

Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Wholesale price of milling wheat

Russian Ruble per tonne



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief The Russian Federation

Reference Date: 04-June-2020

HIGHLIGHTS

- Favourable prospect for 2020 wheat crops
- Slightly above-average cereal production obtained in 2019
- Above-average cereal exports forecast in 2019/20
- Export prices of wheat remained stable in May after increasing in April

Favourable prospect for 2020 wheat crops

Harvesting of the 2020 winter crops, mainly winter wheat, accounting for about 70 percent of the total annual output, planted in September-October 2019, will begin in July. Despite favourable rains in May, crop conditions are reported to be below average in the key winter wheat producing Southern Federal District due to drier-than-average weather conditions in March and April 2020. By contrast, in the other main winter wheat producing North Caucasus, Volga and Central districts, cumulative rains as of late May were above the average levels and crops conditions were overall favourable.

Planting of the 2020 spring crops, mainly barley and maize, is ongoing under favourable weather conditions and crops are expected to be harvested from August.

Given that the total area planted with wheat (winter and spring crops) is forecast to reach a record high of 29 million hectares, if weather conditions will be favourable in the remainder of the season, the aggregate 2020 wheat output can be expected at about 77 million tonnes, 5 percent above the average level.

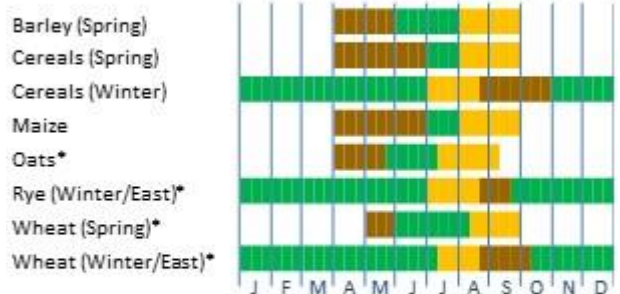
Slightly above-average cereal production obtained in 2019

Harvesting of the 2019 cereal crops was completed last September and the 2019 aggregate cereal output is estimated at about 118 million tonnes, slightly above the five-year average level. Despite drier and warmer-than-average weather conditions in May and June 2019 in the key producing Volga and Central federal districts, the output of wheat is officially set at about 74.5 million tonnes, 6 percent above the average level due to an expansion in plantings. Barley and maize outputs are also estimated at above-average levels, at 20.5 million and 14.3 million tonnes, respectively, due to favourable weather conditions in the season, which boosted yields.

Russian Federation

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Russian Federation

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	70 602	72 136	74 453	3.2
Barley	18 715	16 992	20 489	20.6
Maize	12 894	11 419	14 282	25.1
Others	10 677	9 271	8 630	-6.9
Total	112 888	109 818	117 854	7.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Above-average cereal exports forecast in 2019/20

Aggregate cereal exports in the 2019/20 marketing year (July/June) are forecast at 41.6 million tonnes, 5 percent above the five-year average volume. Wheat shipments, accounting on average for 80 percent of the total cereal exports, are forecast at 32.5 million tonnes, about 7 percent above the average volume. Similarly, barley and maize exports are foreseen at 4.7 million and 4 million tonnes, respectively, slightly above the five-year average levels.

In response to the COVID-19 emergency (see box below), on 27 March 2020, the Government set a 7 million tonnes export quota on wheat, maize, barley and rye to the countries outside the Eurasian Economic Union (EAEU) for the period 1 April to 30 June 2020 to ensure adequate availabilities on the national markets and prevent price increases. On 26 April 2020, the quota had been exhausted. In addition, the Board of Ministers of the EAEU has established a ban on exports, to countries outside the EAEU, of various staple food products, including rye, millet, wholemeal grains and sunflower seeds until 30 June 2020.

Export prices of wheat remained stable in May after increasing in April

Export prices of milling quality wheat showed an overall increasing trend since September 2019, despite some declines in February and March. Prices increased particularly in April, while they remained overall stable in May, as downward pressure from weaker demand for imports was mostly offset by the production forecast downgrades.

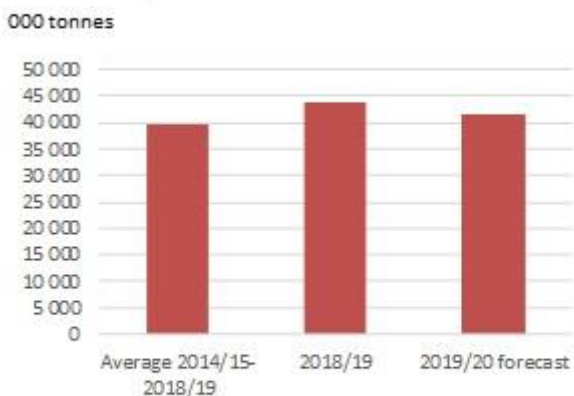
Prices of domestic wheat have been seasonally increasing since last August and surged in April and May 2020 mainly due to strong consumer demand.

Retail prices of potatoes, another important food staple, seasonally increased from December 2019 and rose particularly in April and May 2020, due to reduced availabilities of high-quality tubers and strong domestic demand.

On 31 March 2020, in response to the COVID-19 emergency (see box below), in an effort to avoid price increases, the Government announced the sale on the local markets of 1 million tonnes, later raised to 1.5 million tonnes, of grains from the State-owned agricultural companies, starting from 13 April 2020.

Russian Federation

Cereals Exports

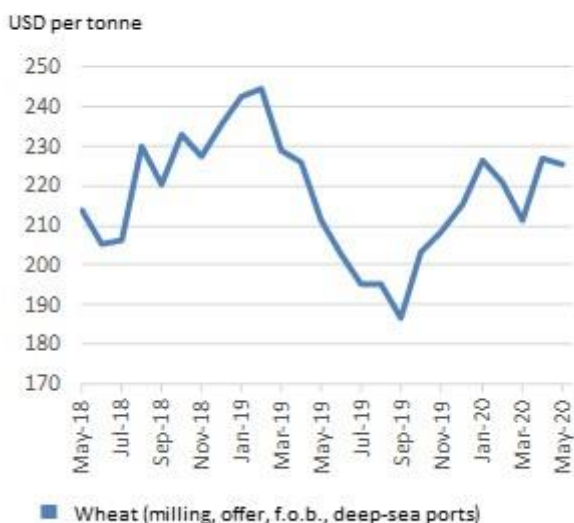


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Russian Federation

Export price of milling wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, the Government has taken a number of measures, including the implementing temperature screening procedures at all airports and checkpoints, closing borders to non-nationals, imposing quarantine and self-isolation measures, prohibiting public indoor events.

In addition, the Government implemented measures to support Small and Medium Enterprises (SMEs) by deferring loan payments for up to six months to SMEs in hard-hit industries (leisure and hospitality, transportation, travel, etc.), providing interest-free bank loans to SMEs to cover wage payments. Furthermore, a financial reserve for RUB 300 billion (USD 4.3 billion) was established to support the economy and compensate quarantined citizens for the lost income.

It was also decided to reset the import duties and expand the practice of using the customs "green corridor" for certain types of socially important goods.

On 22 April 2020, the Ministry of Agriculture approved the list of system-forming (strategic) companies of the agro-industrial complex, including 66 companies entitled to receive special measures of State support. Of these, 14 are crop-growing, 27 are livestock-raising, 20 are food and beverage producers and four are fish-producing companies. The measures include:

- State guarantee for interest-free loans supporting employment: the company can get a six-month interest-free loan in an amount of minimal monthly salary for each employee in case the company does not reduce staff.
- Special subsidies for working capital loans: the State subsidizes part of the interest and provides the State guarantee covering 50 percent of the loaned amount.

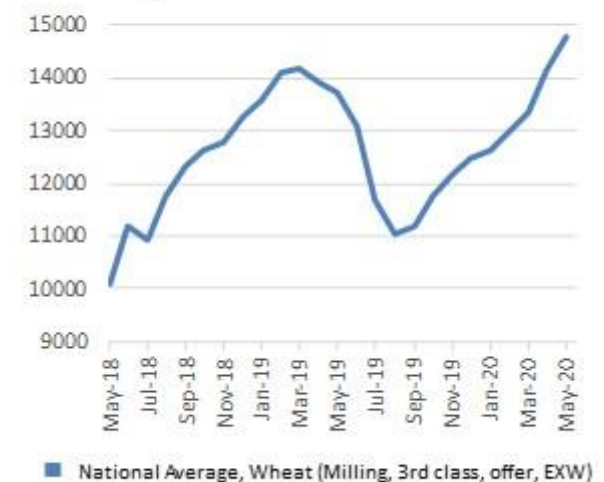
The Ministry of Agriculture is preparing a package of new benefits for small agri-business entities that have no place to sell their products due to the closure of the markets and fairs. Farmers, in particular, will be helped to organize on-line trading. In addition, agricultural cooperatives are entitled to subsidies for providing their own stores with refrigeration equipment.

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Russian Federation

Wholesale price of milling wheat

Russian Ruble per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief The Russian Federation

Reference Date: 04-December-2019

HIGHLIGHTS

- Record area planted with 2020 winter cereals
- Cereal production in 2019 estimated slightly above average
- Above-average cereal exports forecast in 2019/20
- Export prices of wheat increased significantly in October and November

Record area planted with 2020 winter cereals

Planting of the 2020 winter cereal crops (mainly wheat) was completed in October and the area sown is officially estimated at a record 18.2 million hectares, buoyed by favourable weather conditions and underpinned by Government policies to boost exports. Winter crops are expected to be harvested in July and August next year.

As of late November, soil moisture levels were reported to be adequate for crop emergence and establishment in the main winter cereals' growing areas of North Caucasus, Southern, Volga and Central districts.

Cereal production in 2019 estimated slightly above average

Harvesting of the 2019 winter and spring cereals was completed in August and September, respectively, under favourable weather conditions. The aggregate 2019 cereal output is estimated at about 118 million tonnes, slightly above the five-year average, on account of large outputs of wheat and barley. Despite drier and warmer-than-average weather conditions in May and June in the key producing Volga and Central federal districts, the aggregate (spring and winter) wheat output is set at 75.5 million tonnes, 7 percent above the average level due to an expansion in plantings. Barley production is also estimated to be above average, at 20 million tonnes, due to favourable weather conditions during the season, which boosted yields. Maize output is set at a near-average level of 13 million tonnes.

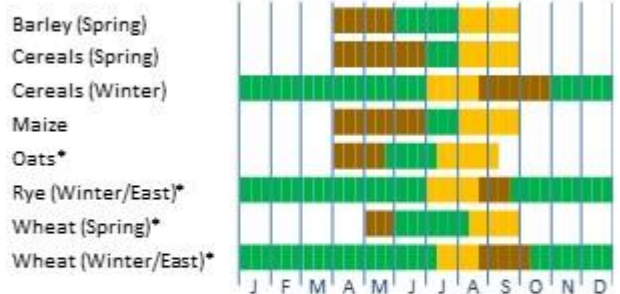
Above-average cereal exports forecast in 2019/20

In the 2019/20 marketing year (July/June), aggregate cereal exports are forecast at about 44 million tonnes, 10 percent above the five-year average. Competitive domestic wheat prices, supported by the extension of the zero duty policy on wheat

Russian Federation

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Russian Federation

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	70 602	72 136	75 500	4.7
Barley	18 715	16 992	20 000	17.7
Maize	12 894	11 419	13 000	13.8
Others	10 679	9 272	9 225	-0.5
Total	112 889	109 819	117 725	7.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

exports until July 2021 (see [FPMA Price Policy](#)), are expected to sustain wheat exports in the 2019/20 marketing year. As a result, wheat shipments, accounting for 80 percent of the total cereal exports, are forecast at 33.5 million tonnes, about 10 percent above the average volume.

Barley shipments are foreseen at an above-average level of 5.2 million tonnes, while maize exports are forecast at 4.4 million tonnes, close to the average volume.

Export prices of wheat increased significantly in October and November

After decreasing between March and September 2019, export prices of milling quality wheat increased considerably in October and November. The rise mainly reflects the strong demand by importers and the prevailing price trends in the international market. Prices, however, remained almost 9 percent below their level of November 2018, reflecting the good output obtained in 2019.

Domestic wholesale prices of wheat grain and wheat flour rose markedly, in line with seasonal trends, between September and November, after five months of consecutive declines, but remained lower than their values a year earlier.

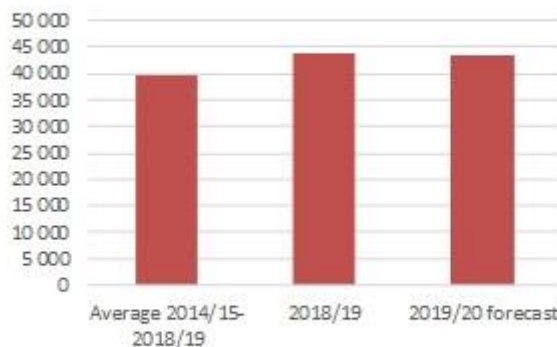
Retail prices of potatoes, another important food staple, seasonally sharply decreased in September and October, to levels slightly below those a year before.

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Russian Federation

Cereals Exports

000 tonnes



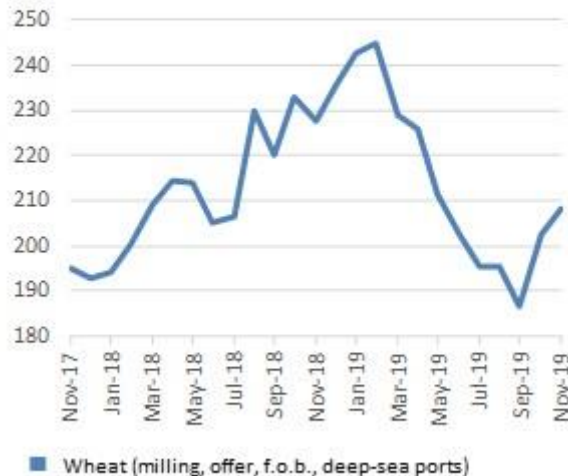
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Russian Federation

Export price of milling wheat

USD per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Russian Federation

Wholesale price of milling wheat

Russian Ruble per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief The Russian Federation

Reference Date: 17-July-2019

HIGHLIGHTS

- One-third of winter wheat crops harvested as of early July
- Cereal production in 2019 forecast slightly above average
- Bumper exports of wheat forecast in 2019/20
- Export prices of wheat decreased steeply between March and June 2019

One-third of winter wheat crops harvested as of early July

Harvesting of winter crops, mainly wheat, is ongoing and is expected to finalize by mid-August. As of early July, about 17 million tonnes of wheat had been collected from an area of 4 million hectares, nearly one-third of the total area sown with winter wheat. Weather conditions have been overall favourable between November 2018 and April 2019, with adequate snow levels and warmer-than-average temperatures during the winter that mitigated the risk of frost damage. In May and June, however, below-average rain levels and above-average temperatures were observed in most parts of the Volga and Central federal districts, which, on average, produce about 40 percent of the total winter wheat output. In these areas, soil moisture levels were reported to be below average as of early July.

Planting of the spring crops, for harvest in August-September 2019, finalized by the end of June, under generally favourable weather conditions.

Cereal production in 2019 forecast slightly above average

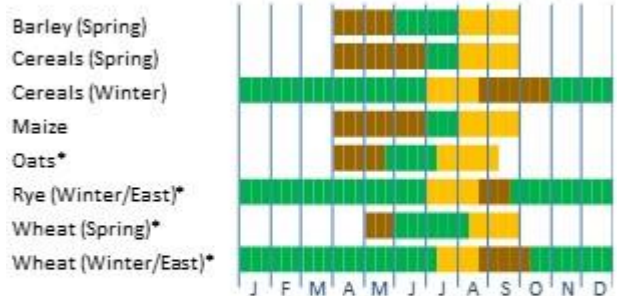
The FAO forecast of the 2019 aggregate wheat output (winter and spring crops) has been recently revised downwards on account of drier and warmer-than-average weather conditions, over the last two months, in key producing areas. However, as a result of larger-than-average plantings, production is still forecast at an above-average level of 76 million tonnes.

By contrast, barley production is forecast at 18.3 million tonnes, about 10 percent below the average level, due to a gradual decrease in plantings over the last years. Maize output is forecast at a near-average level of 13 million tonnes. The 2019 aggregate

Russian Federation

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Russian Federation

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Wheat	70 602	72 136	76 000	5.4
Barley	18 715	16 992	18 300	7.7
Maize	12 894	11 419	13 000	13.8
Others	10 679	9 272	9 862	6.4
Total	112 889	109 819	117 162	6.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

cereal production is forecast at 117 million tonnes, 3 percent above the average level.

Bumper exports of wheat forecast in 2019/20

In the 2019/20 marketing year (July/June), aggregate cereal exports are forecast at about 47 million tonnes, about 20 percent above the five-year average and the second highest volume after the 2017 record. Competitive domestic wheat prices, supported by the extension of the zero duty policy on wheat exports until July 2021 (see [FPMA Price Policy](#)), are expected to boost wheat exports in the 2019/20 marketing year. As a result, wheat shipments, accounting for 80 percent of the total cereal exports, are forecast at 37 million tonnes, about 20 percent above the average volume.

Barley shipments are foreseen at an above-average level of 5.2 million tonnes, while maize exports are forecast at 4.4 million tonnes, close to the average volume.

Export prices of wheat decreased steeply between March and June 2019

Export prices of milling wheat peaked in February 2019, due to shrinking domestic supplies as a result of the 2018 reduced output and large exports in the season. Prices decreased steeply between March and June, reaching levels close to or slightly below those of a year earlier, pressured downwards by the ongoing harvest and the prospects of an above average production.

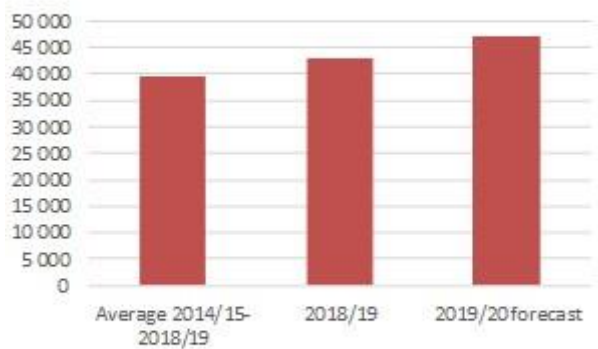
Domestic wholesale prices of wheat grain and wheat flour weakened over the last months, but, in June 2019, they were still well above their levels a year before.

Retail prices of potatoes, another important food staple, increased steeply in June for the third consecutive month, in line with seasonal trends. However, they are likely to decrease soon, with the harvest of 2019 crops in August/September.

Russian Federation

Cereals Exports

000 tonnes



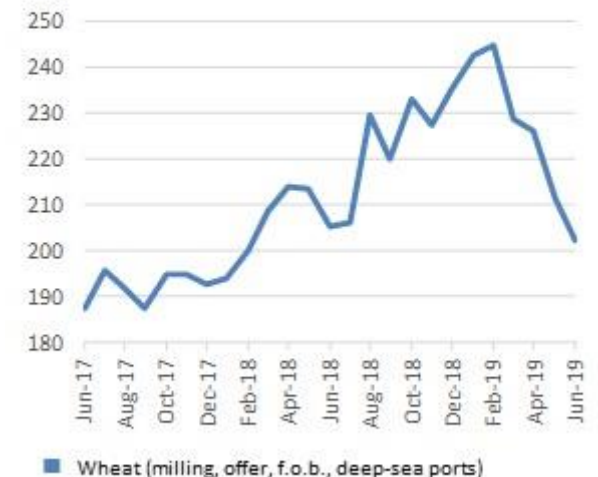
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Russian Federation

Export price of milling wheat

USD per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Russian Federation

Wholesale price of milling wheat

Russian Ruble per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GLEWS Country Brief The Russian Federation

Reference Date: 26-March-2019

HIGHLIGHTS

- Favourable prospects for 2019 winter wheat
- Above-average cereal production obtained in 2018
- Cereal exports in 2018/19 forecast at very high level
- In February, export prices of wheat at highest levels since January 2015

Favourable prospects for 2019 winter wheat

Winter wheat crops, to be harvested in July/August 2019, are reported to be in fair to good conditions over more than 90 percent of the planted area, reflecting favourable weather conditions. Since early December 2018, in the main winter wheat producing Southern and North Caucasian districts, adequate snow levels and warmer-than-average temperatures mitigated the risk of frost damage and secured good moisture reserves for crops when they exit dormancy in early spring (March-April). In early March, winter grains resumed growth in Krasnodar Province and in other parts of the North Caucasian District, where remote sensing data showed slightly drier and warmer-than-average conditions. By contrast, in the Southern District, where snow was still present, winter wheat was still dormant.

The area planted between August and October with 2019 winter cereals, mostly wheat, is estimated at about 17.6 million hectares, 5 percent above the previous year's above-average level. Given the expansion in winter plantings and assuming average area planted with spring wheat, if weather conditions will be favourable, the 2019 total wheat production can be tentatively forecast at between 78 and 80 million tonnes, above both the previous year and the five-year average.

Planting of spring crops, for harvest in August-September 2019, is expected to start in April.

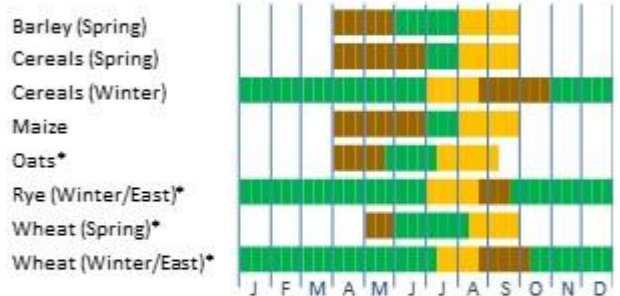
Above-average cereal production in 2018

The 2018 aggregate cereal production is estimated at 109 million tonnes, slightly above the five-year average level. Despite some areas in southern and central regions were affected by drier and warmer-than-average weather conditions, wheat output is officially set at an above average of 72.1 million tonnes on account of increased plantings. By contrast, barley and maize output are estimated at below the average levels as yields were reduced by unfavourable weather conditions.

Russian Federation

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Russian Federation

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	66 549	85 863	72 068	-16.1
Barley	18 394	20 599	16 981	-17.6
Maize	12 937	13 236	11 163	-15.7
Others	11 071	11 434	9 256	-19.0
Total	108 951	131 131	109 468	-16.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal exports in 2018/19 forecast at very high level

In the 2018/19 marketing year (July/June), aggregate cereal exports are forecast at about 44 million tonnes, about 20 percent above the five-year average and the second highest volume after the previous year's record. Wheat shipments, accounting for 80 percent of total cereal exports, are forecast at about 36 million tonnes, 25 percent above the average. Barley shipments are foreseen at an above-average level of 5 million tonnes, while maize exports are forecast at 2.8 million tonnes, less than half the volume exported in the previous year and well below the five-year average level on account of reduced harvest in 2018.

In February, export prices of wheat at highest levels since January 2015

Since November 2018, export prices of milling wheat increased steeply and, in February 2019, they reached the highest levels since January 2015, due to shrinking supplies, following 2018 reduced output and large exports in the season. Between January and February, the increase was moderate, as the upward pressure from tighter availabilities was partially offset by a slowdown in foreign demand, strong competition in international markets and favourable prospects for the 2019 domestic production.

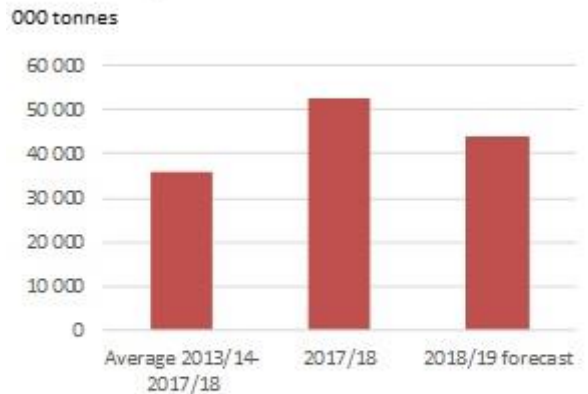
Shrinking national supplies put upward pressure also on domestic wholesale prices of milling quality wheat, which increased during the last months and, in February 2019, they reached levels more than 20 percent above those a year earlier.

Retail prices of potatoes, another important food staple, rose seasonally in the past months and, in February 2019, were slightly higher than a year earlier.

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Russian Federation

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Russian Federation

Export price of milling wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Russian Federation

Wholesale price of milling wheat

Russian Ruble per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief The Russian Federation

Reference Date: 12-December-2018

HIGHLIGHTS

- Area planted with 2019 winter cereals forecast at above average level
- Cereal production in 2018 estimated slightly below average
- Cereal exports in 2018/19 forecast at second highest level after last year's record
- In November, export prices of wheat higher than year earlier

Area planted with 2019 winter cereals forecast at above average level

As of late November, about 17.6 million hectares of the 2019 winter cereal crops, mostly wheat, were planted, which is 2.5 percent more than the official forecast and 5 percent above the 2018 above-average level.

Winter crop conditions, as of early December, were reported to be mostly favourable. Above average precipitations in early October delayed crop development in northwestern provinces and minimal precipitations caused soil moisture deficits in the Southern and North Caucasian highly productive districts. However, precipitation levels returned to average in late October and heavy snowfalls occurred in mid-November, covering winter crops, which entered the dormancy phase.

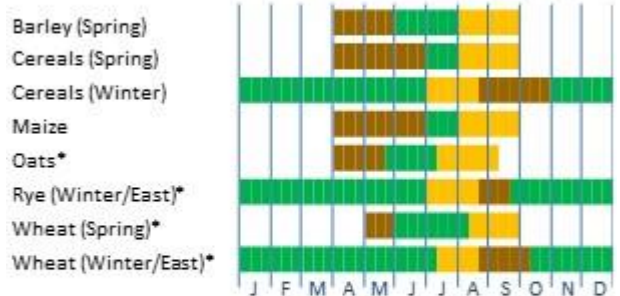
Cereal production in 2018 estimated slightly below average

The 2018 aggregate cereal production is estimated at a slightly below average level of 106.2 million tonnes. Wheat output, which accounts for about 65 percent of the total cereal production, is set at 70.4 million tonnes. This is 6 percent above the five-year average despite several large grain producing areas in the southern and central regions were affected by drought during the vegetation period and by excessive rainfall and lower-than-average temperatures during harvesting. Barley production, on the contrary, is set at a below average level of 16.7 million tonnes. Similarly, maize output is estimated to decrease to 8.6 million tonnes, 33 percent below the five-year average, as yields were reduced by unfavourable weather conditions.

Russian Federation

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Russian Federation

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	66 549	85 863	70 400	-18.0
Barley	18 394	20 599	16 700	-18.9
Maize	12 937	13 236	8 650	-34.6
Others	11 071	11 434	10 451	-8.6
Total	108 951	131 131	106 201	-19.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal exports in 2018/19 forecast at second highest level after last year's record

Aggregate cereal exports in the 2018/19 marketing year (July/June) are forecast at about 42 million tonnes, the second highest volume after last year's record.

Wheat shipments, accounting for about 80 percent of total cereal exports, are expected at 34.5 million tonnes, 28 percent above the average and this would confirm the country's position as the world's top wheat exporter. Barley shipments are expected at the an above average level of 4.4 million tonnes, while maize exports are forecast at 3.7 million tonnes, well below the five-year average level.

In November, export prices of wheat higher than year earlier

Since July, export prices of milling quality wheat have generally increased and, as of November, they were higher on a yearly basis. The overall increasing trend is mostly the result of strong import demand, driven in part by a weaker currency and pressure from lower grain inventories. However, upward pressure has been somewhat limited by a decline in fuel costs.

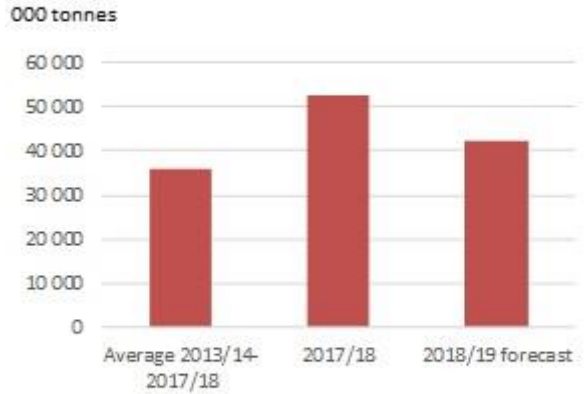
Domestic wholesale prices of wheat flour increased during the last months, and in November, they were about 20 percent higher than a year before, following a strong demand for imports from abroad and a yearly reduction of production.

Retail prices of potatoes, another important food staple, remained virtually unchanged in November compared to the previous month and they were close to their year earlier levels.

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Russian Federation

Cereals Exports

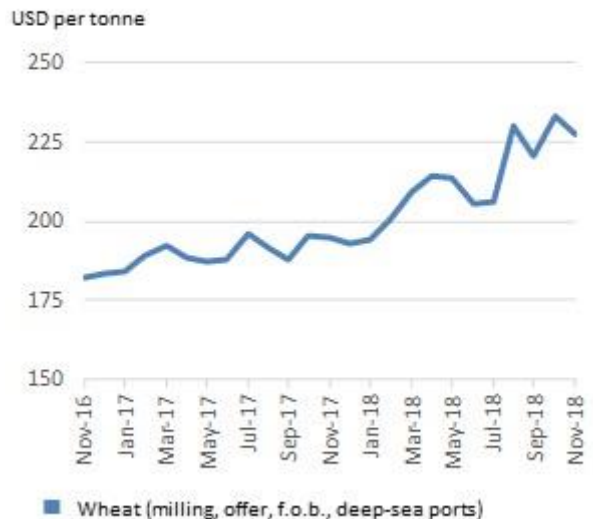


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Russian Federation

Export price of milling wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Russian Federation

Wholesale price of milling wheat

Russian Ruble per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief The Russian Federation

Reference Date: 17-July-2018

HIGHLIGHTS

- Cereal production forecast at above average level in 2018
- Total cereal exports in 2018/19 marketing year set below previous year's record highs
- Export and domestic prices of wheat above year-earlier values in June

Cereal production in 2018 forecast at above average level

Harvesting of winter cereals is ongoing. The harvest started two weeks earlier than a year ago amid the dry weather. The sowing of spring wheat (or cereal) crops was completed by mid-June. The planting of spring wheat and barley declined compared to last year, wheat was sown on 12.2 million hectares (13.1 million hectares in 2017), barley on 7.7 million hectares (7.4 million hectares in 2017) and maize on 2.6 million hectares (2.9 million hectares in 2017). According to remote sensing data, conditions of spring crops are below average in most regions of the country.

FAO's latest forecast of aggregate cereal production has been revised downward since last month due to concerns about dry weather conditions. Total 2018 cereal output (winter plus spring crops) is now set at an average of 111 million tonnes, a 16 percent decline from the record production obtained in 2017.

The decline is mostly due to a reduced production of wheat, which is forecast at 70 million tonnes, about 18 percent less than the 2017 level. Maize and barley outputs are also expected to decline due to the negative impact on yields due to unfavourable weather conditions.

Cereal exports in 2018/19 forecast below record high levels of previous year

Total cereal exports in the 2018/19 marketing year (July/June) are forecast at about 46 million tonnes, almost 14 percent below the record level of 2017/18 but still second highest. Most of the projected decline is due to lower wheat exports, which are expected at 37 million tonnes, about 4 million tonnes below the 2017/18 level amid the reduction in domestic production.

Similarly, barley exports are forecast at 4.4 million tonnes, declining by 25 percent from the record of 2017/18, while maize shipments are set at 4 million tonnes.



Russian Federation
Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Wheat	66 549	85 863	70 000	-18
Barley	18 394	20 599	17 000	-17
Maize	12 937	13 236	12 300	-7
Others	11 071	11 434	11 400	0
Total	108 951	131 131	110 700	-16

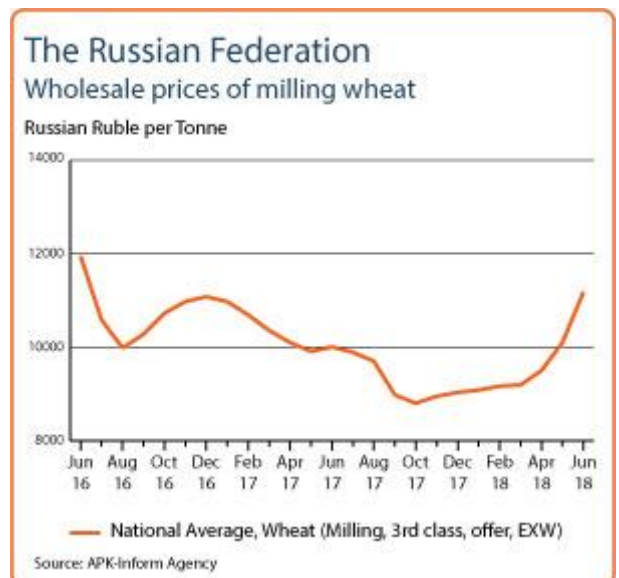
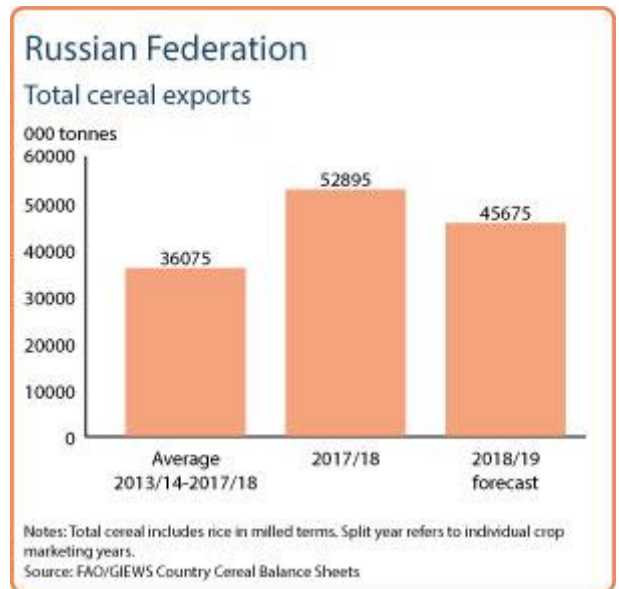
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Export and domestic prices of wheat above their year-earlier values in June

Export prices of wheat declined by 4 percent from their high values of April 2018, but in June were about 10 percent above their values of a year earlier due to a solid pace of shipments and expectations of a reduction in 2018 wheat harvest.

Domestic prices of wheat increased by 20 percent since the start of the calendar year, supported by concerns over reduced domestic supplies. In June 2018, domestic wholesale prices of milling wheat were 12 percent above their levels of the year earlier.

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GIEWS Country Brief The Russian Federation

Reference Date: 29-May-2018

HIGHLIGHTS

- Area planted with 2018 winter cereals forecast to be similar to 2017 high level
- Cereal exports set to reach record highs in 2017/18 marketing year
- Export prices of wheat 15 percent above year-earlier values in April

Cereal production forecast second highest in history

The area planted with winter cereals (mainly wheat) to be harvested in July/August 2018 is estimated at around 17.5 million hectares, close to 2017's high level. Weather conditions have been generally favourable for dormancy and development of winter crops during the November-March period.

As of end-April, the spring crops were reported to be sown on 3.4 million hectares, compared to the 4.2 million hectares in 2017. The sowing campaign is lagging behind in many regions due to adverse weather conditions. Heavy precipitations prevented tractors to properly carrying out field works. The delay in plantings is expected to lead to an increase in area planted of late spring crops, such as maize.

The 2018 aggregate cereals (winter plus spring crops) output is forecast by FAO at about 121.9 million tonnes, about 7 percent below the 2017 record level. This result is essentially due to a reduced wheat crop, which is anticipated at 78 million tonnes, following a year-on-year decline in yields.

Cereal exports set to reach record high levels in 2017/18

Total cereal exports in the 2017/18 marketing year (July/June) are forecast at about a record of 50 million tonnes, almost 40 percent above the already high level of 2016/17. Most of the increase is due to higher wheat exports, which are forecast at a record of 40 million tonnes, as limited availability of quality milling wheat in other exporting countries boosted import demand for Russian wheat.

Amid record supplies of wheat in the country, the Ministry of Agriculture granted a rail freight compensation for export grain deliveries from distant areas, including Siberia, Ural, Volga and Central regions.



Russian Federation
Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes		percent	
Wheat	66 549	85 863	78 000	-9
Barley	18 394	20 599	18 000	-13
Maize	12 937	13 236	14 500	10
Others	11 071	11 434	11 400	0
Total	108 951	131 131	121 900	-7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

According to custom data, as of 2 May 2018, the country exported 34.4 million tonnes of wheat since the start of the marketing year in July 2017, about 44 percent above the corresponding period in the previous year.

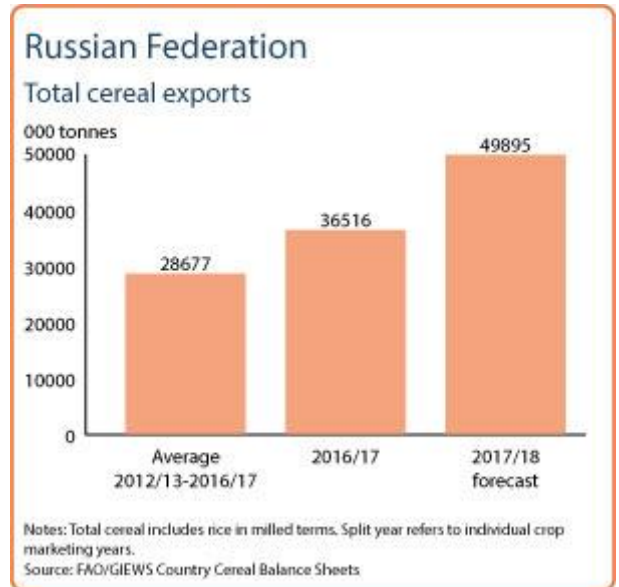
Barley exports are forecast at 5.5 million tonnes, with a 90 percent increase on the 2016/17 level on account of the larger domestic output obtained in 2017.

Export prices of wheat remained above year-earlier values

Since February, export prices of wheat increased by 7 percent and in April were about 15 percent above their values of a year-earlier due to a solid pace of shipments. Strong import demand, high international prices and the strengthening of the national currency underpinned prices and offset the downward pressure due to the 2017 record crop.

Domestic prices of wheat received some support from strong export demand since February, but in April, prices were still below their values of a year before due to abundant local supplies from the record 2017 harvest. As a result, domestic wholesale prices of milling wheat in April 2018 were 6 percent below their levels of the year earlier.

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GIEWS Country Brief The Russian Federation

Reference Date: 06-February-2018

HIGHLIGHTS

- Area planted under 2018 winter cereals forecast to be similar to 2017 high level
- Cereal production in 2017 estimated at record level
- Cereal exports set to reach record highs in 2017/18 marketing year
- Export prices of wheat remained above their year-earlier values

Area planted under winter cereals in 2018 forecast to be similar to 2017 high level

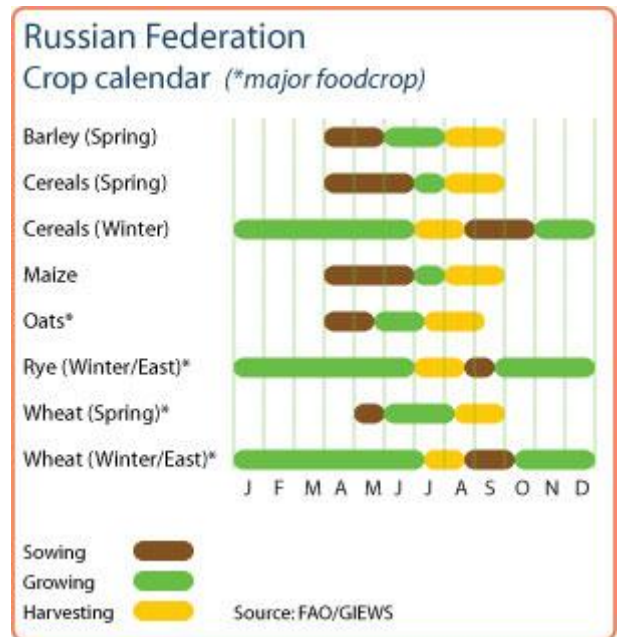
Planting of winter cereals (mainly wheat) to be harvested in July/August 2018 was completed by the end of November 2017. According to official forecasts, around 17.12 million hectares were planted, close to 2017's high level. Above-average temperatures during the November-December period were favourable for the survival of winter crops and good snow coverage offset the negative effects of the cold spells in January.

Cereal production reached new record in 2017

The 2017 aggregate cereal production (including winter and spring crops), is estimated about 10 percent above the 2016 high level. The increase is mainly due to the record high wheat output, estimated close to 86 million tonnes, due to favourable weather conditions during the summer months that boosted yields. Barley output is estimated at 20.6 million tonnes, about 14 percent more than 2016 output, mainly as a result of larger plantings. By contrast, maize production is estimated at 12 million tonnes, showing a 20 percent decline from the 2016 record level. The current estimate of maize production has been revised downward by 2 million tonnes since the beginning of the season due to dry weather conditions in the summer and excessive rainfall during September and beginning of October, which delayed the harvesting campaign.

Cereal exports set to reach record high levels in 2017/18

Total cereal exports in the 2017/18 (July/June) marketing year are forecast at about record 43 million tonnes, almost 20 percent above the high level of 2016/17. Most of the increase is due to higher wheat exports, which are forecast to reach a record of 35 million tonnes, as limited availability of quality milling wheat in other exporting countries boosted import demand for Russian wheat. In particular, the Government of Egypt, the largest wheat



Russian Federation
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Wheat	56 920	73 295	85 819	17
Barley	17 065	17 993	20 587	14
Maize	11 933	15 310	12 051	-21
Others	10 554	11 131	11 406	2
Total	96 472	117 728	129 863	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

buyer, imposed new requirements for imported wheat, raising the protein content from 11.5 to 12.5 percent for wheat bought from the Black Sea region. This measure favoured Russian exports as locally-produced wheat has higher protein content compared to Ukrainian wheat.

Amid record supplies of wheat in the country, the Ministry of Agriculture granted a rail freight compensation for export grain deliveries from distant areas, including Siberia, Ural, Volga and Central regions. According to custom data, as of 17 January 2018, the country exported 22.6 million tonnes of wheat since the start of the marketing year in July 2017, about 35 percent above the corresponding period in the previous year.

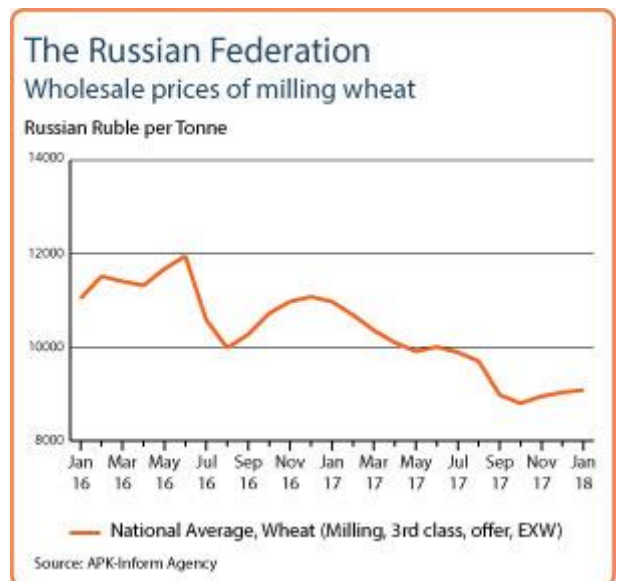
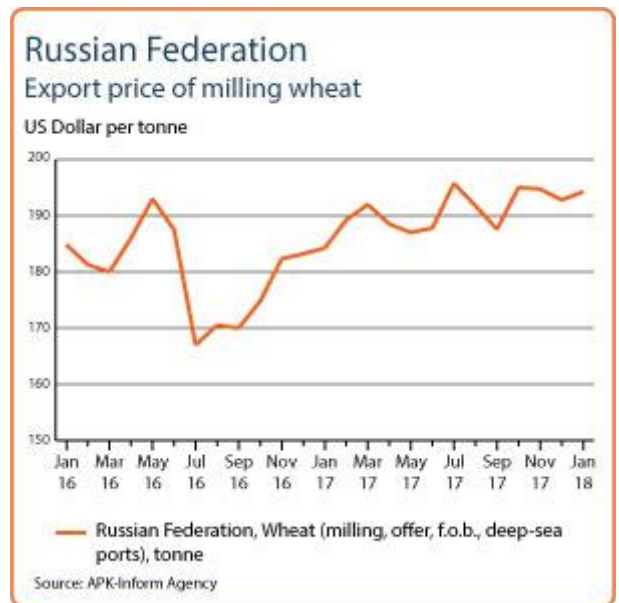
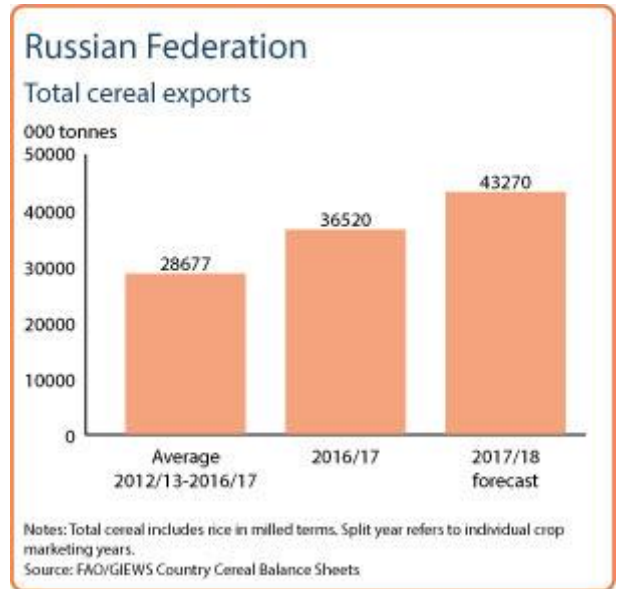
Maize exports are forecast at 5.5 million tonnes, 10 percent above the high level of 2016/17.

Export prices of wheat remained above their year-earlier values

In the past three months, export prices of wheat remained above their values of a year-earlier due to a solid pace of shipments. Strong import demand, particularly from Egypt, high international prices and strengthening of the national currency underpinned prices and offset the downward pressure due to the 2017 record crop. Export prices in January 2018 were around 5 percent above their values of a year earlier and around 3 percent above their lower levels of September 2017.

Despite the high pace of shipments, abundant local supplies from the record 2017 harvest continued to weight on domestic prices of wheat grain. As a result, domestic wholesale prices of milling wheat in January 2018 were 20 percent below their levels of the year earlier. However, over the last three months, prices received support from high export demand and increased slightly from their low levels of October 2017.

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GIEWS Country Brief The Russian Federation

Reference Date: 16-October-2017

HIGHLIGHTS

- Cereal production in 2017 estimated at record level
- Cereal exports set to reach record high in 2017/18 marketing year
- Prices of wheat declined since August

Cereal production reached record level in 2017

The 2017 aggregate cereal production (winter plus spring crops) is estimated to surpass the high level obtained in 2016 by about 12 million tonnes. The increase is mainly due to the record high wheat output, which is estimated at 84 million tonnes. This estimate has been revised upward since the start of the season mainly on account of favourable weather conditions during the summer months that boosted yields. Barley output is also estimated to increase by 11 percent to 20 million tonnes in 2017 as a result of larger plantings. By contrast, maize production is expected to decline from the record level of the previous year and is now forecast at 14 million tonnes. The current forecast of maize production has been revised downward by 2 million tonnes since the beginning of the season due to dry weather conditions in summer and excessive rainfall during September and beginning of October, which is delaying the ongoing harvesting campaign.

The planting of winter cereals (mainly wheat) for harvest in 2018 has started in the southern parts of the country in August. By the beginning of October, plantings were completed on about 74 percent of the intended area. Weather conditions were reported to be generally unfavourable for emergence of winter crops. Due to high temperatures and lack of precipitations, the area intended for winter crops is likely to be less than the last years.

Cereal exports set to reach record high levels in 2017/18

Total cereal exports in the 2017/18 (July/June) marketing year are set at around 43 million tonnes, an absolute record and almost 20 percent above the previous high level achieved in 2016/17. Most of the increase is expected to come from higher wheat exports which are forecast to reach a record of 31.2 million tonnes. This would confirm the country to be the biggest wheat exporter in the world for the second consecutive year.

Limited availability of quality milling wheat in other exporting countries are expected to boost import demand for Russian



Russian Federation
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	56 921	73 295	84 000	15
Barley	17 064	17 988	20 300	13
Maize	11 933	15 310	14 000	-9
Others	10 555	11 135	10 484	-6
Total	96 472	117 728	128 784	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

wheat. Egypt, the largest wheat buyer, imposed new requirements for imported wheat, raising the protein content from 11.5 to 12.5 percent for wheat bought from the Black Sea region. This measure is expected to favour exports from the Russian Federation, where wheat has higher protein content compared to Ukraine.

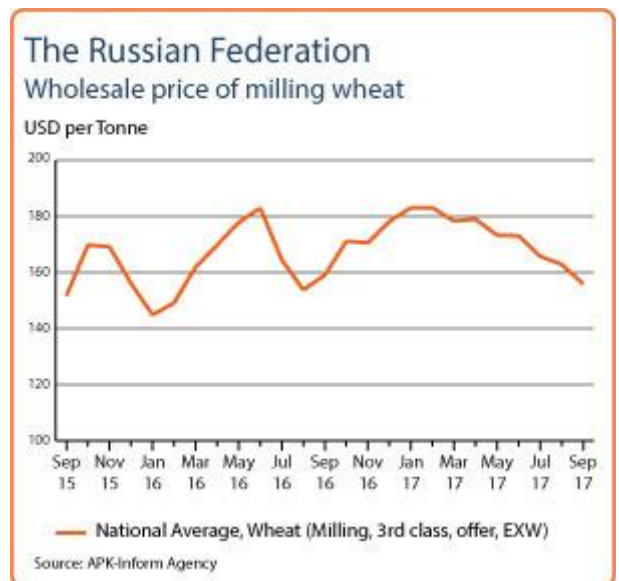
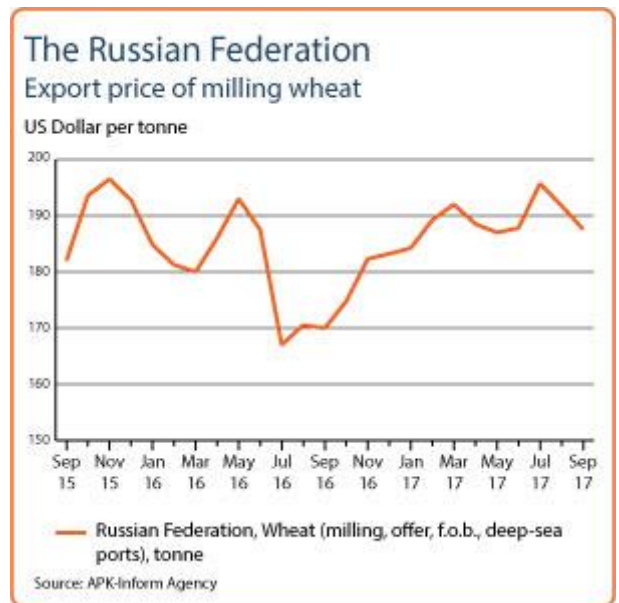
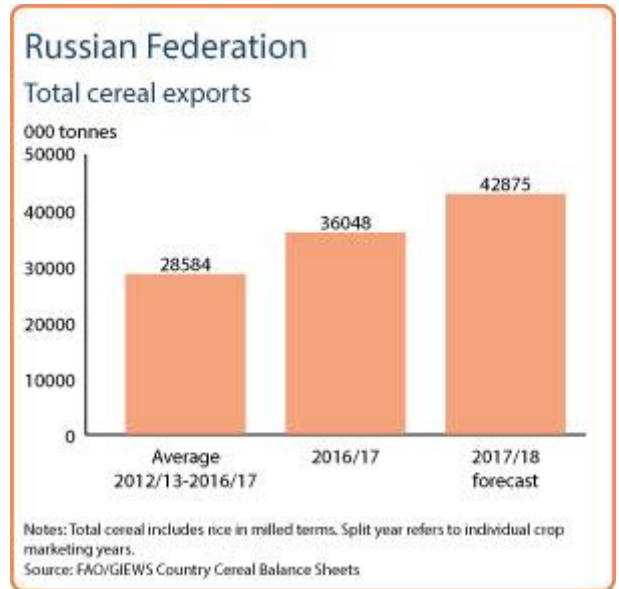
Amid record supplies of wheat in the country, the Ministry of Agriculture proposed to allocate a rail freight compensation for export grain deliveries from distant areas: Siberia, Ural, Volga and Central regions.

Maize exports are also set to increase to 5.5 million tonnes, 10 percent above the high level of 2016/17.

Export prices of wheat and wheat flour declined since beginning of harvest

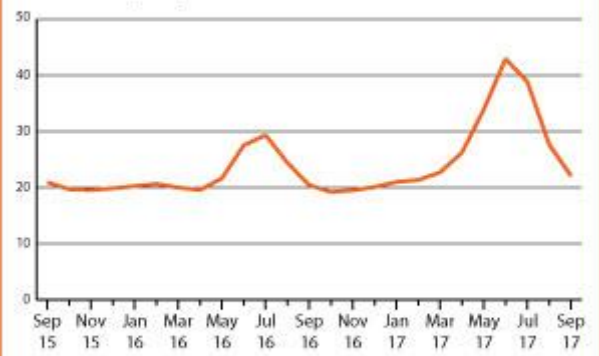
Since early August, domestic and export prices of wheat declined pressured by the ample supplies from the record 2017 harvest. Although strong demand for Black Sea wheat provided some support to export prices in the second half of September, prices were 5 percent below their high values of July. Domestic wholesale prices of milling wheat in September reached their lowest level since October 2014.

Prices of potatoes continued to decline sharply in September and were 50 percent below their record highs in June. However, an anticipated 40 percent reduction in the 2017 crop is expected to keep potato prices above their values of a year earlier.



Russian Federation Prices of potatoes

Russian Ruble per Kg



— National Average

Source: Federal State Statistics Service

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GIEWS Country Brief The Russian Federation

Reference Date: 03-April-2017

HIGHLIGHTS

- Cereal production in 2017 is forecast slightly below last year's record level
- Cereal exports set to reach a record high in 2016/17 marketing year
- Export prices for wheat increased over the last six months

Early indicators point to a small reduction in 2017 harvest from last year's record level

Around 17.4 million hectares have been planted with winter cereals (mainly wheat and barley) for harvest in 2017, 2 percent more than in 2016. Conditions of winter cereals are favourable as the crop exits dormancy. Growth of winter cereals has begun in the Southern and North Caucasian federal districts. As of 27 March, the Ministry of Agriculture reported that spring grains were planted on the area of 0.5 million hectares (1.7 percent of the total forecast).

FAO's early forecast puts 2017 aggregate cereal production (winter plus spring crops) at about 111 million tonnes, 6 percent below the record of last year. This reduction is essentially due to expectations of average yields, below the high level achieved in 2016 and some reduction in area planted under spring crops.

Cereal production reached record in 2016

The latest estimate of 2016 cereal production stands at a record level of 118 million tonnes following exceptionally high yields.

Wheat production is estimated now at 73 million tonnes, 19 percent up from last year following better-than-expected yields although the share of high-quality wheat is reported to be smaller than the previous year. Maize output also reached a record level of 15 million tonnes in 2016 as a result of increased plantings and higher yields. Better yields also contributed to small increases in production of barley.

Cereal exports in 2016/17 marketing season set to reach record high levels

Despite record domestic production in 2016 and the wheat export tax set to zero, the pace of grain exports fell short of market expectations since the beginning of the marketing year. Total cereal exports in the 2016/17 (July/June) marketing year are now set at around 37 million tonnes, still a record and 6 percent above



Russian Federation
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	56 921	73 295	69 000	-6
Barley	17 064	17 988	17 500	-3
Maize	11 932	15 309	14 533	-5
Others	10 574	11 227	10 296	-8
Total	96 491	117 819	111 329	-6

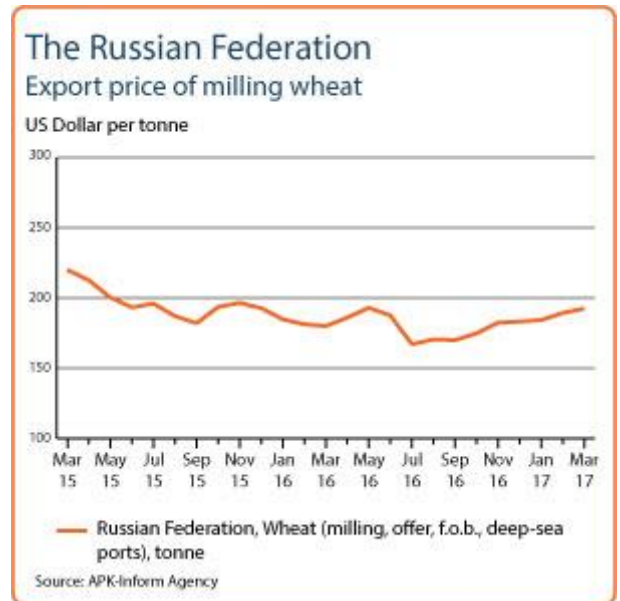
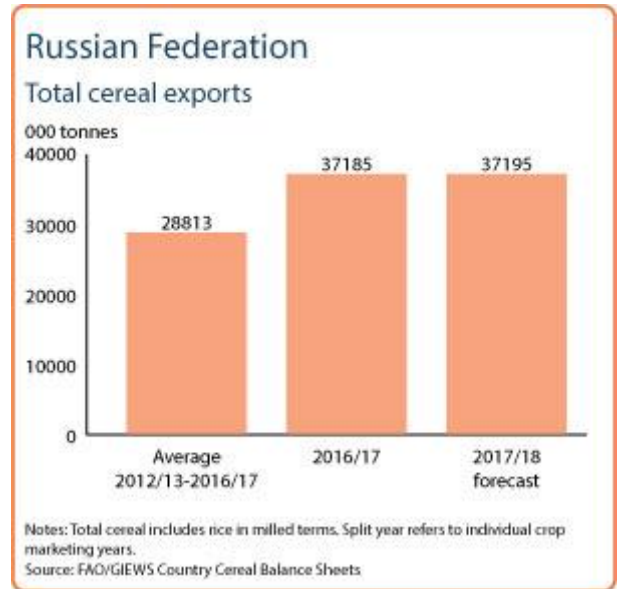
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

the previous high level achieved in 2015/16, but below expectations at the beginning of the season. Most of the increase is expected to come from higher wheat exports, which are forecast at 28.5 million tonnes. However, the forecast can be downgraded since Turkey excluded the Russian Federation from the list with zero imports in mid-March. As a result, the country might face difficulties to re-orient the supplies of agricultural products usually exported to Turkey. Maize exports are set at 5 million tonnes, 3 percent above the high level of 2015/16, following abundant domestic availability.

Export prices of wheat and wheat flour increased over last six months

Export prices of milling wheat showed an increasing trend over the past six months supported by strong demand from key importers. At the beginning of the winter, prices were also underpinned by concerns about growing conditions for the recently-sown 2017 crops in certain areas of the Black Sea region. However, improved conditions of winter wheat crop and concerns about trade with Turkey are expected to put some pressure on wheat export prices in the coming months.

Domestic prices of wheat declined in March, and were 9 percent below their values in January 2017, mainly reflecting the strengthening of the Russian Rouble.





GIEWS Country Brief The Russian Federation

Reference Date: 20-December-2016

HIGHLIGHTS

- Cereal production forecast at record level in 2016
- Cereal exports also set to reach new record in 2016/17 marketing year
- Export and domestic prices for wheat increased over last three months

Cereal production forecast at record level in 2016

Total cereal production in 2016 is forecast to reach 116 million tonnes, 13 percent up from the already bumper level of 2015, mainly on account of favourable weather during the winter and spring that boosted yields. Wheat production is now forecast at a record level of 72 million tonnes, up from earlier expectations and 16 percent up from last year following better than expected yields although the crop quality is reported to be poorer. A lesser increase is expected for the maize crop, which is forecast at around 15 million tonnes, 11 percent up from 2015, mostly as a result of increased plantings. Better yields contributed to an estimated 7 percent production increase of barley.

Planting of winter crops to be harvested in 2017 is virtually complete. Although heavy precipitation caused some delay in planting in the south of the country, as of 12 December, around 17.37 million hectares have been planted, 6 percent more than at the corresponding date in 2016.

Cereal exports in 2016/17 marketing season also set to reach record high

Despite record domestic production in 2016 and the removal of the wheat export tax, the pace of grain exports fell short of market expectations since the beginning of the marketing year, which led to a downgrade of the initial export forecast. Total cereal exports in the 2016/17 (July/June) marketing year are now set at around 37 million tonnes, still a record level and 6 percent above the previous high achieved in 2015/16. Most of the increase is expected to come from higher wheat exports, which are forecast at around 29 million tonnes, making the country the first wheat exporter in the world in 2016/17.

Maize exports are seen at 5 million tonnes, 3 percent above the high level of 2015/16.



Russian Federation
Cereal production

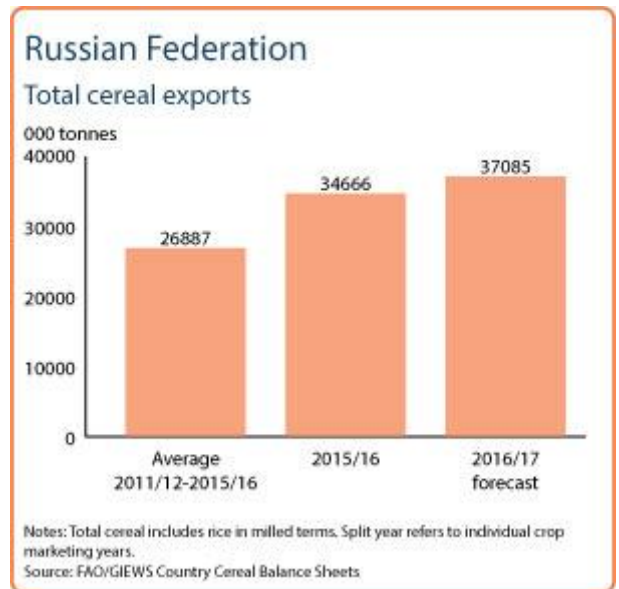
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes		percent	
Wheat	53 508	61 786	71 800	16
Barley	16 853	17 546	18 700	7
Maize	10 263	13 173	14 600	11
Others	10 643	9 925	10 552	6
Total	91 267	102 430	115 652	13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Prices of wheat and wheat flour has increased over last three months

Export prices of milling wheat increased over the past three months supported by strong demand from key importers. Prices were also underpinned by concerns about growing conditions for the recently sown 2017 crops in certain areas of the Black Sea region. Moreover, unfavourable weather conditions in October November have caused logistic problems, especially regarding the delivery to the ports. However, at the second week of December, export prices of milling wheat decreased for the first time in the last three months. Prices are being pressured by expanding wheat supplies from Argentina and Australia.

Domestic prices of the country rose since August as a result of the shortage of high quality wheat. Intervention purchases also gave some support to prices in October.





GIEWS Country Brief The Russian Federation

Reference Date: 07-October-2016

HIGHLIGHTS

- Cereal production forecast at record level in 2016
- Cereal exports also set to reach new record in 2016/17 marketing year
- Export prices for wheat increased in September

Cereal production forecast at record level in 2016

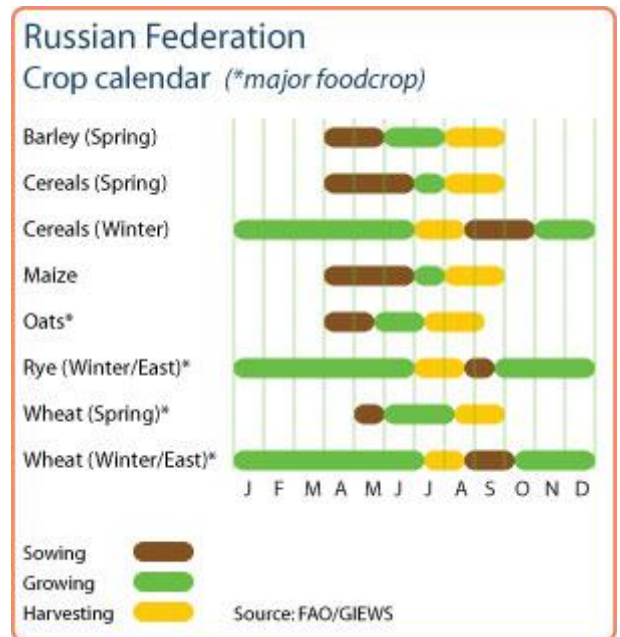
Total cereal production in 2016 is forecast to reach 111 million tonnes, 8 percent up from the already bumper level of 2015, mainly on account of favourable weather during winter and spring that boosted yields. Wheat production is now forecast at a record level of 69.5 million tonnes, up from earlier expectations and 13 percent up from last year, following better-than-expected yields, although the crop quality is reported to be poorer. A lesser increase is expected for the maize crop, which is forecast at 13.5 million tonnes, 3 percent up from 2015, mostly as a result of increased plantings. By contrast, a contraction in the area planted to barley resulted in an estimated 2 percent production decrease.

Cereal exports in 2016/17 marketing season also set to reach record high

Total cereal exports in the 2016/17 marketing year are forecast at around 39 million tonnes, a new record level, 16 percent above the previous high achieved in 2015/16. Most of the increase is expected to come from higher wheat exports. The record domestic production and the removal of the wheat export tax are expected to boost exports. Moreover, wheat export availability in the European Union, historically a major competitor of the Black Sea region, is anticipated to decrease significantly following unfavourable weather.

As a result, wheat shipments are forecast to reach 29.5 million tonnes, which would make the Russian Federation the biggest wheat exporter in the world in 2016/17.

Maize exports are seen at 4.5 million tonnes, 500 000 tonnes below the high level of 2015/16.



Russian Federation
Cereal production

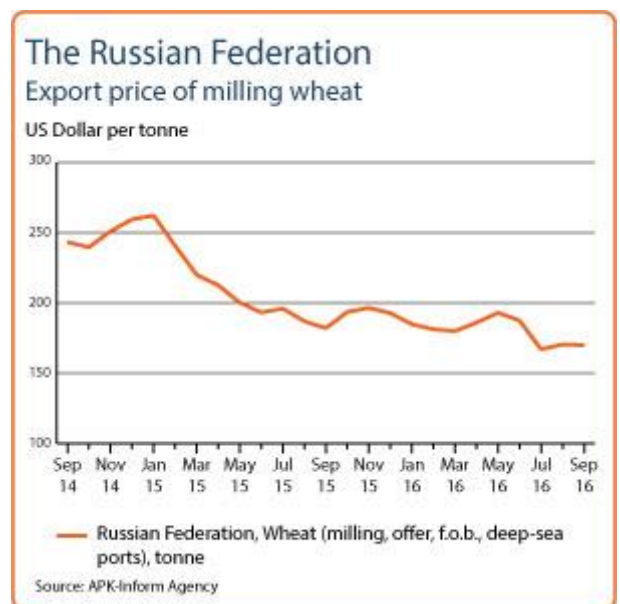
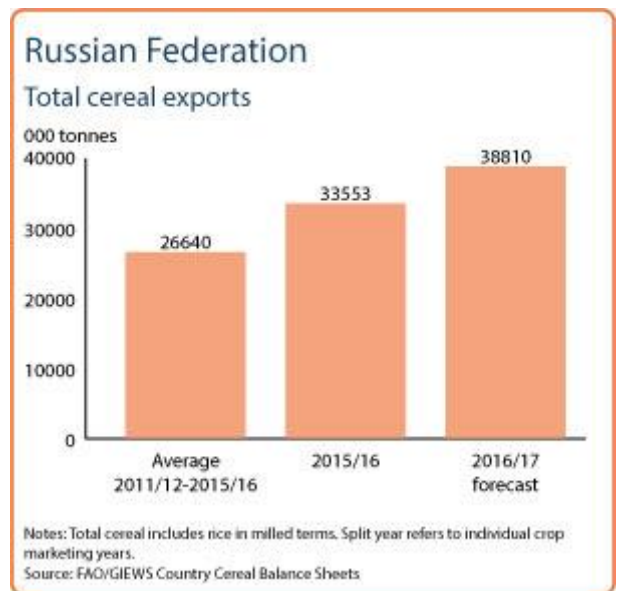
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	53 508	61 786	69 500	12
Barley	16 853	17 546	17 198	-2
Maize	10 263	13 173	13 540	3
Others	10 643	9 925	10 532	6
Total	91 267	102 430	110 770	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Export prices for wheat increased slightly in September, while domestic prices declined

Limited supplies of high quality wheat and heavy rains over central parts of the country, led to a 3 percent increase in domestic prices of wheat in September.

However, export prices for wheat showed little net change in September. Export prices were slightly supported by resumption of sales to Egypt, however, heavy export availabilities continue to weigh on prices.





GIEWS Country Brief The Russian Federation

Reference Date: 07-September-2016

FOOD SECURITY SNAPSHOT

- Cereal production forecast at record level in 2016
- Cereal exports also set to reach new record in 2016/17 marketing year
- Export prices for wheat increased in August

Cereal production forecast at record level in 2016

Total cereal production in 2016 is forecast to reach 111 million tonnes, 8 percent up from the already bumper level of 2015, mainly on account of favourable weather during winter and spring that boosted yields. Wheat production is now forecast at a record level of 69.5 million tonnes, up from earlier expectations and 13 percent up from last year, following better-than-expected yields, although the crop quality is reported to be poorer. A lesser increase is expected for the maize crop, which is forecast at 13.5 million tonnes, 3 percent up from 2015, mostly as a result of increased plantings. By contrast, a contraction in the area planted to barley resulted in an estimated 2 percent production decrease.

Cereal exports in 2016/17 marketing season also set to reach record high

Total cereal exports in the 2016/17 marketing year are forecast at around 39 million tonnes, a new record level, 16 percent above the previous high achieved in 2015/16. Most of the increase is expected to come from higher wheat exports. The record domestic production together with removal of the wheat export tax are expected to boost exports. Moreover, wheat export availability in the EU, historically a major competitor of the Black Sea region, is anticipated to decrease significantly following unfavourable weather.

As a result, wheat shipments are forecast to reach 29.5 million tonnes, which would make the Russian Federation the biggest wheat exporter in the world in 2016/17.

Maize exports are seen at 4.5 million tonnes, 500 000 tonnes below the high level of 2015/16.

Export prices for wheat increased slightly in August, while domestic prices declined

Limited supplies of high quality wheat, coupled with strong export demand, led to a 2 percent increase in export prices of wheat in August.

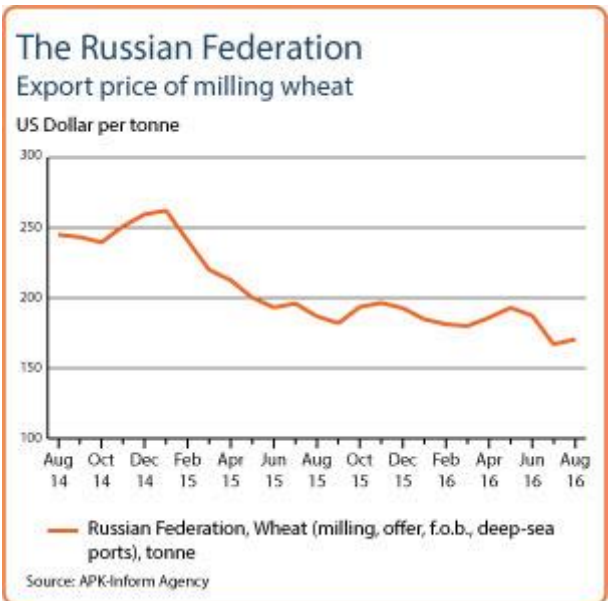
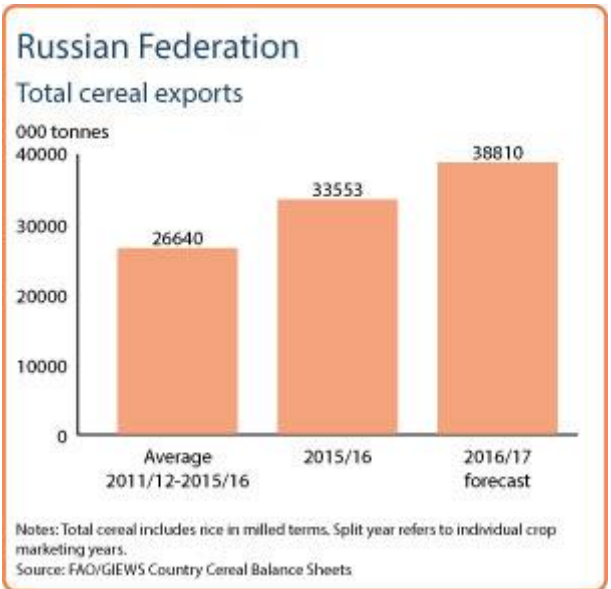


Russian Federation
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	53 508	61 786	69 500	12
Barley	16 853	17 546	17 198	-2
Maize	10 263	13 173	13 540	3
Others	10 643	9 925	10 532	6
Total	91 267	102 430	110 770	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

However, domestic prices for wheat declined by more than 5 percent. Massive sales of feed wheat of last year's harvest, abundant supplies from the new crop and strengthening of the national currency weighed on prices.





GIEWS Country Brief Russian Federation

Reference Date: 06-June-2016

FOOD SECURITY SNAPSHOT

- Latest forecast for 2016 points to highest cereal production since 2008
- Exports in 2016/17 marketing year forecast slightly below last season's record
- Export and domestic prices for wheat increased in May

Latest forecast for 2016 points to highest cereal production since 2008

Dry weather and poor soil moisture last autumn during planting of the winter cereal crops raised concerns over winter crop conditions. However, winter and spring weather has been favourable for the development of winter crops and planting of spring cereals, leading to an improved outlook for this year's cereal production and upward revision to the output forecast from earlier expectations. As of May, FAO's forecast for the country's cereal production in 2016 stands at 105.4 million tonnes, of which wheat would account for 62.5 million tonnes. Maize production is forecast at a record level of 13.8 million tonnes. Maize production has increased steadily over the past years due to increased plantings and use of hybrid seeds.

Exports in 2016/17 marketing season forecast slightly below 2015/16 level

Total cereal exports in the 2016/17 marketing year are forecast at around 30 million tonnes, marginally below the record of the previous season. Wheat exports are expected to account for 22.5 million tonnes, down just 1 million tonnes from the record of the previous season. Maize exports are seen at 4 million tonnes, unchanged from the high level of 2015/16 and just 1 percent below the record of 2013/14.

Regarding imports, high quality wheat and wheat flour imports are increasing on rising demand. Around 600 000 tonnes of wheat and wheat flour (in grain equivalent) are expected to be imported in 2016/17, that is triple of the 2014/15 level although half of the level in 2005/06. Kazakhstan remains the main supplier of high quality wheat and wheat flour to the country.



**Russian Federation
Cereal production**

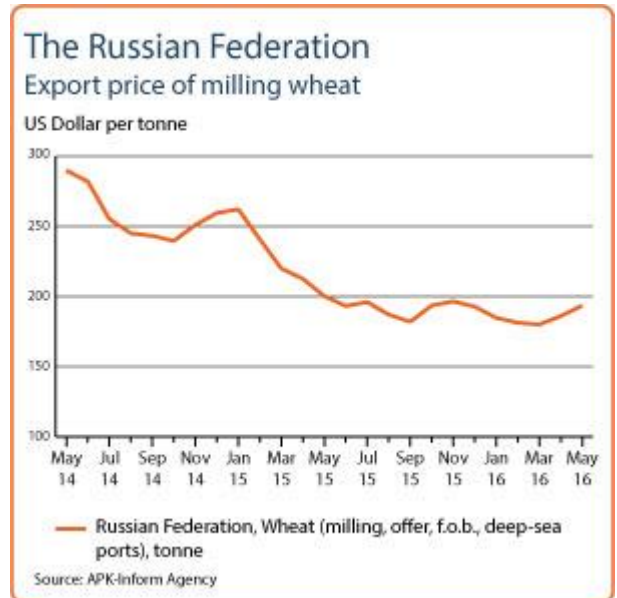
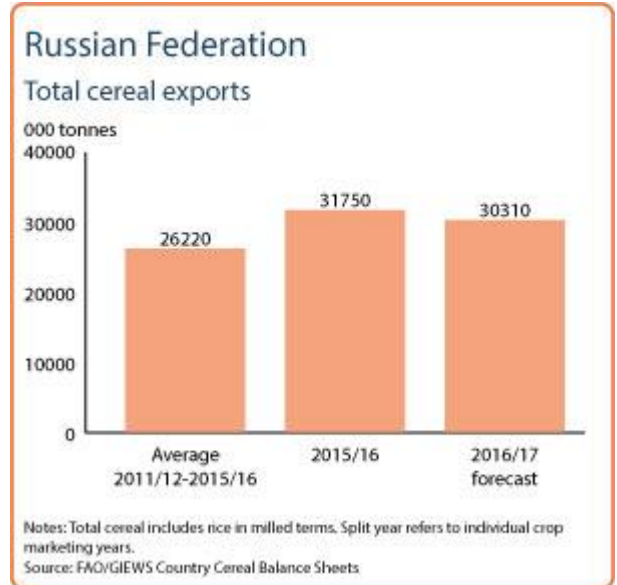
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes		percent	
Wheat	53 508	61 786	62 500	1
Barley	16 853	17 546	17 529	0
Maize	10 263	13 173	13 819	5
Others	10 639	9 915	11 628	17
Total	91 262	102 420	105 476	3

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

Export and domestic prices for wheat increased in May

Domestic prices of milling wheat increased slightly in May, reflecting the devaluation of the Rouble and limited grain supply. Prices of wheat were higher by almost 20 percent than in May last year, mainly due to the weakening of the national currency.

Export prices of milling wheat increased in May, as a result of increased demand. At this level, prices are just 4 percent below their year-earlier level.



Reference Date: 03-February-2016

HIGHLIGHTS

- Dry weather adversely impacted winter cereal planting for 2016 harvest, but overall crop conditions are good
- Cereal production in 2015 estimated at good level
- Exports in 2015/16 marketing year forecast above last season's record
- Export prices decreased further, while domestic prices rising following devaluation of the Roubles

Dry weather adversely impacted winter cereal planting for 2016 harvest, but overall crop conditions are good

Unfavourable dry weather conditions last autumn during planting of the winter cereal crops for harvest in July-August 2016, resulted in the irregular emergence of some crops. However, precipitation in November somewhat improved moisture and crop conditions before dormancy and good snow in most regions reduced the risk of winterkill. As of the end of January, around 90 percent of the winter cereal area was officially reported in good or satisfactory condition. The total area planted to winter cereals is estimated at 16.3 million hectares, slightly below 16.8 million hectares of last year.

Cereal production in 2015 estimated at good level

The latest estimate of 2015 total cereal production stands at 104.3 million tonnes, which is just 1 percent less than in 2014. Wheat output is estimated at 61.8 million tonnes, up 3.5 percent from an already high level of 2014. Maize production is estimated at 12.7 million tonnes, 12 percent up from 2014, following increased planting area and better yields. By contrast, barley harvest decreased by 14 percent to 17.5 million tonnes, mainly due to weather-induced lower yields.

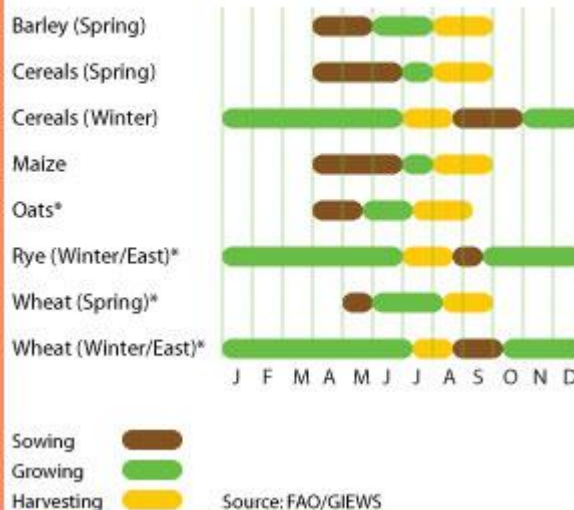
Exports in 2015/16 marketing year forecast above last season's record

Cereal exports in 2015/16 marketing season are forecast at around 31 million tonnes, marginally higher than the previous season. Of the total, wheat is expected to account for 23.5 million tonnes, up 7 percent from the previous season. According to latest available data, from 1 July 2015 to 27 January 2016, cereal exports amounted to 21.9 million tonnes, 3.7 percent less than the corresponding period of the previous year. During the same period, shipments of wheat were 16.5 million tonnes. The introduction of a floating tax in July restrained the pace of wheat exports in the first months of the season. However, since 1 October 2015, the Government revised the formula of the customs duties allowing traders to increase wheat shipments on foreign markets.

Export prices decreased further, while domestic prices are rising following devaluation of the Roubles

Domestic prices of milling wheat increased slightly in January, reflecting the devaluation of the Roubles and increased trade activity. Prices of

Russian Federation Crop calendar (*major foodcrop)

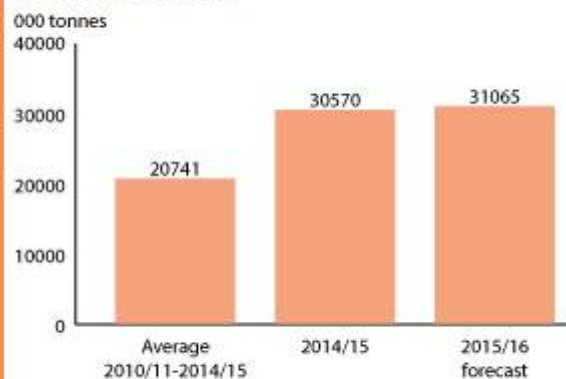


Russian Federation Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	49 450	59 711	61 789	3
Barley	15 444	20 444	17 546	-14
Maize	8 245	11 332	12 685	12
Others	9 985	11 631	9 869	-15
Total	83 125	103 118	101 889	-1

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

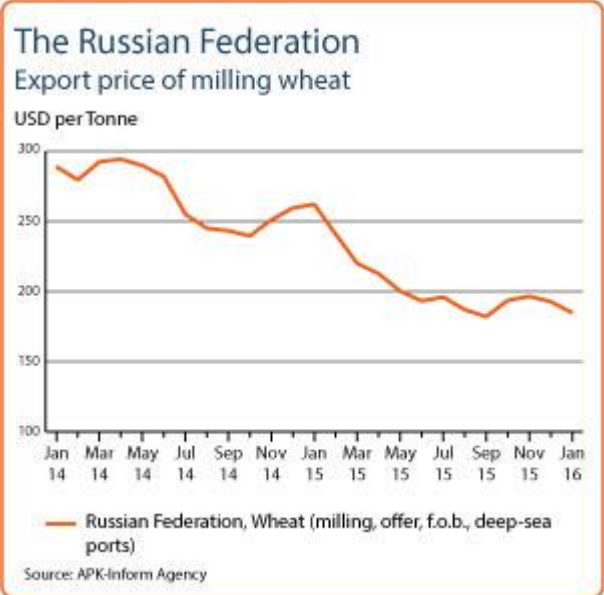
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

wheat and wheat flour, however, remained lower than in January last year, mainly pressured by the good 2015 output.

By contrast, export prices of milling wheat declined by 4 percent in January, as a result of ample supplies and strong export competition on global markets. At this level, prices are almost one-third below their year-earlier level.



Reference Date: 29-September-2015

HIGHLIGHTS

- Cereal production declined slightly in 2015 from last year's bumper crop but was still above average
- Exports in 2015/16 marketing year (July/June) anticipated at near-record level
- Export prices of milling wheat further decreased in September

Cereal production in 2015 declined slightly from last year's bumper crop but was still above average

Harvesting of the 2015 cereal crops is virtually completed and aggregate output is estimated at 100.9 million tonnes, slightly below the 2014 bumper production but almost 22 percent above the five-year average. Wheat output remained unchanged from the 2014 bumper level, with an increase in harvested area offsetting slightly lower yields achieved this year. For barley, however, with virtually no change in area, lower yields resulted in a significant 15 percent reduction in output. By contrast, maize production increased by 15 percent to 13 million tonnes as a result of increased plantings and better yields.

Regarding the winter cereals for harvest in 2016, planting conditions are reported to be generally satisfactory except in some southern parts where dry weather prevails, raising concerns that planted area may be limited and soil conditions will not favour emergence. However, as the normal sowing period continues up until the end of October, there is still time for conditions to improve should rainfall arrive. The Government's winter grain planting target is set at 18 million hectares, 1 million hectares up from the previous year.

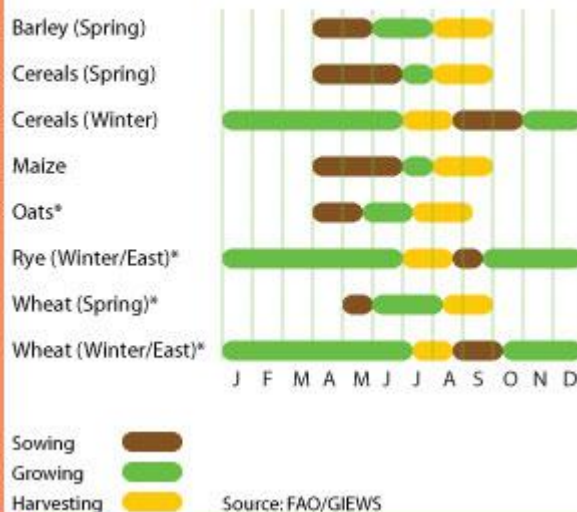
Exports in 2015/16 marketing year (July/June) forecast at near record level

Total cereal exports in the current 2015/16 marketing year (July/June) are forecast at 30.2 million tonnes, marginally lower than last year's record level but 45 percent above the average of the past five years. Wheat represents about 74 percent of exports and the remainder is barley, maize and rye. The bulk of the Russian Federation's exports are destined towards Egypt and Turkey.

Export prices of milling wheat further decreased in September

Export prices of milling wheat continued their decreasing trend since the beginning of the year under downward pressure from sharp depreciation of the local currency coupled with good supplies from the recently-concluded bumper wheat production. In September, export prices of milling wheat were almost one-third below their year-earlier levels. However, while the devaluation of the Rouble has been favourable for encouraging export sales, it has put the domestic market under significant upward pressure with wheat flour quotations in September remaining well above their year-earlier values.

Russian Federation Crop calendar (*major foodcrop)

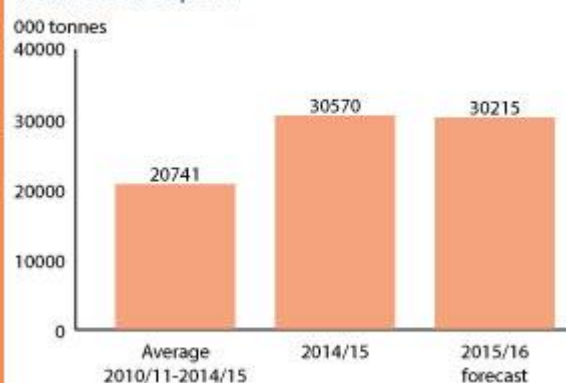


Russian Federation Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	49 450	59 711	59 800	0
Barley	15 444	20 444	17 400	-15
Maize	8 248	11 332	13 000	15
Others	9 698	10 977	10 687	-3
Total	82 841	102 464	100 887	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

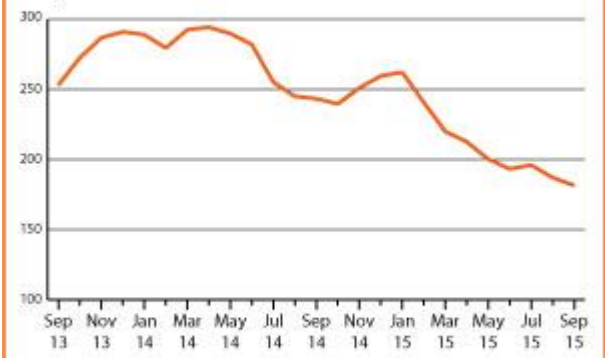
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The Russian Federation Export price of milling wheat

USD per Tonne



— Russian Federation, Wheat (milling, offer, f.o.b., deep-sea ports)

Source: APK-Inform Agency

Reference Date: 14-May-2015

FOOD SECURITY SNAPSHOT

- Aggregate 2015 cereal harvest forecast to decline from last year's bumper crop but still above-average level
- Exports in 2014/15 marketing year (July/June) anticipated at record level
- Export prices of wheat further decreased in April

Aggregate 2015 cereal harvest to decline from last year's bumper crop but still forecast at an above-average level

The 2015 winter cereal crop, mainly wheat and barley, which is expected to be harvested from July, is currently growing under favourable weather conditions. Mild weather in March and above-average rainfall in April, mainly in southern growing areas, improved soil moisture, partly compensating for a dry period during autumn and winter.

Heavy rains during April slowed sowing of the 2015 spring crops with the area planted until mid-May being below the level at the same time a year earlier. Higher input costs may also result in a reduction in plantings. Overall, however, the total area planted to cereals in 2015 is expected to remain unchanged compared to last year's average level, with a strong expansion in winter plantings to offset the projected shortfall in spring sowings. FAO's early forecast put the 2015 aggregate cereal production at 94.8 million tonnes, some 7 percent below last year's bumper level but above the five-year average.

Exports in 2014/15 marketing year (July/June) forecast at record level

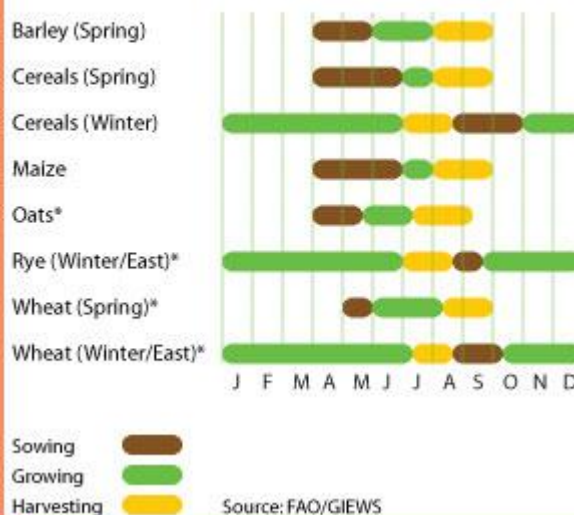
Cereal exports in the current 2014/15 marketing year (July/June) are anticipated at a record level of 27.3 million tonnes, or 7 percent above last year's high level. Wheat represents about 73 percent of exports and the remaining is barley, maize and rye. The largest part of exports is shipped to Egypt, Turkey and the Islamic Republic of Iran. A draft decree on the abolition for existing export duties on wheat has been prepared by the Government and a new formula might come into effect at the beginning of the new agricultural year, on 1 July.

Export prices of wheat further decreased in April

Government restrictions, coupled with further strengthening of the national currency, led to a slowdown in export sales, which put downward pressure on export and domestic prices of wheat in April. Overall, favourable prospects for the 2015 wheat crops also contributed to the price decline. In April, export prices of milling wheat were almost one-third below their year-earlier levels.

Russian Federation

Crop calendar (*major foodcrop)



Russian Federation

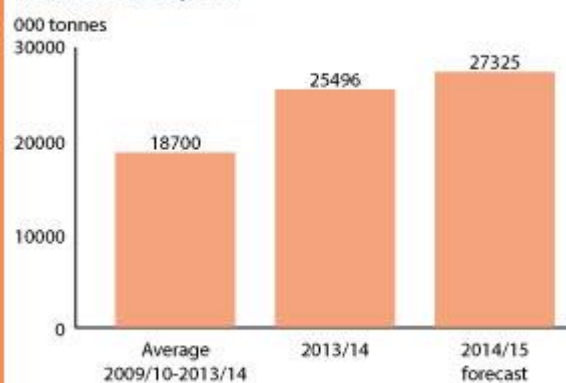
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	49 450	59 711	54 000	-10
Barley	15 444	20 444	19 000	-7
Maize	8 248	11 332	11 400	1
Others	9 698	10 977	10 387	-5
Total	82 841	102 464	94 787	-7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation

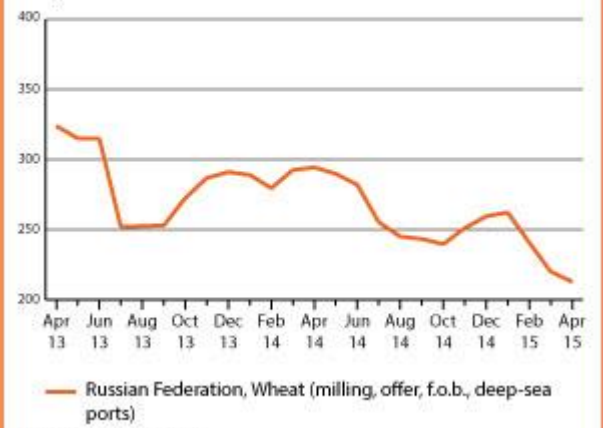
Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The Russian Federation Export price of milling wheat

USD per Tonne



Source: APK-Inform Agency

Reference Date: 23-December-2014

FOOD SECURITY SNAPSHOT

- 2014 aggregate cereal harvest estimated at near-record level
- Exports in 2014/15 marketing year (July/June) forecast at record level
- Export prices of wheat increased in November

2014 aggregate cereal harvest estimated at near-record level

Harvesting of the 2014 cereal crops was completed in October and total production is put at 104 million tonnes, up 16 percent from last year's good level. The bumper output reflects a strong increase in wheat and barley production estimated by FAO at 60.8 and 20.8 million tonnes, respectively. This is mainly attributed to high yields following favourable weather conditions throughout the cropping season and continued Government support to the sector.

Sowing of the 2015 winter cereal crops, mainly wheat and barley, was completed in October. Well below-average temperatures increased stress on winter wheat in the main producing northern growing areas, where dry weather in October and November resulted in poor establishment of the crop. By contrast, in the southern producing areas winter wheat is reported to be in generally good conditions, following favourable weather conditions since the start of the season. Early estimates point to an increase in the area planted to winter cereals to 16.5 million hectares, 2 million hectares up from last year's level.

Exports in 2014/15 marketing year (July/June) forecast at record level

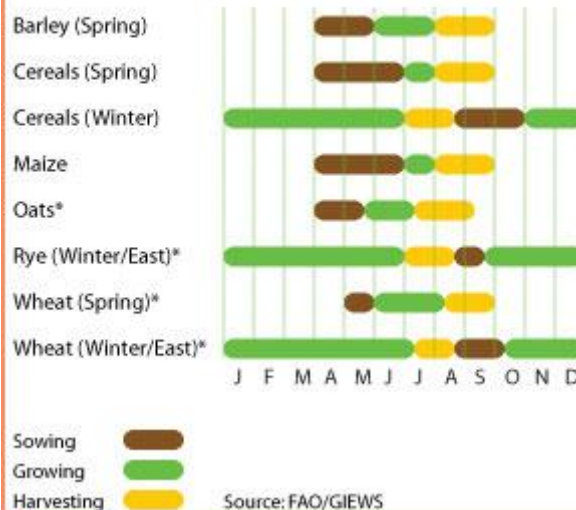
Cereal exports in the current 2014/15 marketing year (July/June) are forecast at a record level of 31.1 million tonnes, or 22 percent higher than last year's high level. Wheat represents about 73 percent of exports and the remaining is barley, maize and rye. The largest part of exports is shipped to Egypt, Turkey and the Islamic Republic of Iran. The Russian Government announced, on 6 August 2014, the ban for one year of most food imports from the United States of America, the European Union, Norway, Canada and Australia. The ban, which does not include U.S.A. rice and wild rice, was introduced on imports of meat, fish, nuts, fruits, vegetables and milk products from 13 August 2014.

Export prices of wheat increased in November

Export prices of wheat increased in November, mainly reflecting the recent sharp depreciation of the national currency, coupled with concerns about adverse weather affecting the newly-planted 2015 wheat crops in parts.

Domestic prices of staple potatoes increased in November, following seasonal decreases in previous months. The strong devaluation of the national currency and high general inflation pushed up prices of meat, dairy and fish products.

Russian Federation Crop calendar (*major foodcrop)

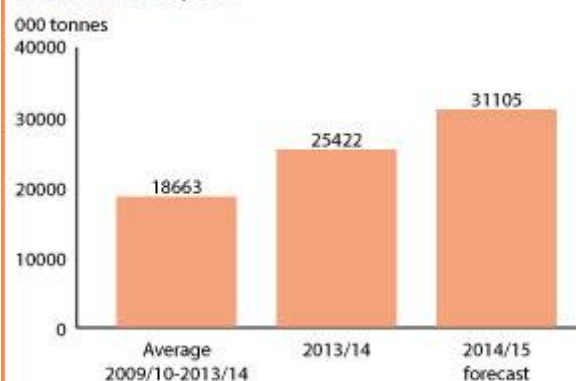


Russian Federation Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	49 856	52 100	60 800	17
Barley	14 943	15 400	20 800	35
Maize	6 847	11 635	12 000	3
Others	9 891	10 478	10 482	0
Total	81 537	89 613	104 082	16

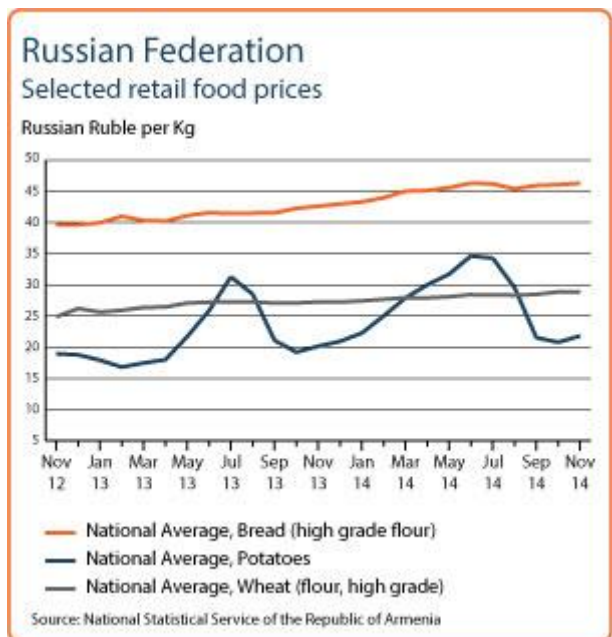
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The annual inflation rate increased for the fourth consecutive month to 9.1 percent in November 2014.



Reference Date: 14-November-2014

FOOD SECURITY SNAPSHOT

- 2014 aggregate cereal harvest estimated at near-record level
- Exports in 2014/15 marketing year (July/June) forecast at record level
- Export wheat prices continue to decline

2014 aggregate cereal harvest estimated at near-record level

Harvesting of the 2014 cereal crops was completed in October and total production is put at 104 million tonnes, up 16 percent from last year's good level. The bumper output reflects a strong increase in wheat and barley production estimated by FAO at 60.8 and 20.8 million tonnes, respectively. This is mainly attributed to high yields following favourable weather conditions throughout the cropping season and continued Government support to the sector.

Sowing of the 2015 winter cereal crops, mainly wheat and barley, was completed in October under generally favourable weather conditions although dry weather in the first half of October over the Volga Valley, an important producing area, hampered somewhat sowing activities. Early estimations point to an increase in the area planted to winter cereals to 16.5 million hectares, 2 million hectares up from last year's level.

Exports in 2014/15 marketing year (July/June) forecast at record level

Cereal exports in the current 2014/15 marketing year (July/June) are forecast at a record level of 31.1 million tonnes, or 22 percent higher than last year's high level. Wheat represents about 73 percent of exports and the remaining is barley, maize and rye. The largest part of exports is shipped to Egypt, Turkey and the Islamic Republic of Iran. The Russian Government announced, on 6 August 2014, the ban for one year of most food imports from the United States of America, the European Union, Norway, Canada and Australia. The ban, which does not include U.S.A. rice and wild rice, was introduced on imports of meat, fish, nuts, fruits, vegetables and milk products from 13 August 2014.

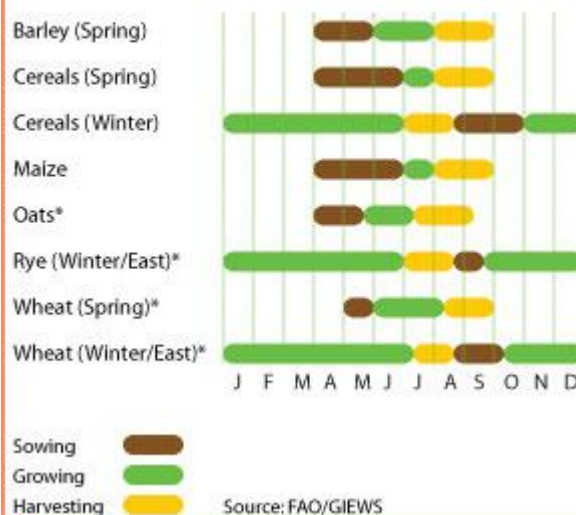
Export wheat prices continue to decline

Wheat export quotations declined slightly in October, continuing the downward trend of the past months, as a result of the recently-completed 2014 bumper harvests coupled with a slowdown in export sales.

Domestic prices of staple potatoes decreased seasonally for the fourth consecutive month in October but remained slightly higher than their year-earlier levels. The strong devaluation of the national currency and high general inflation pushed up prices of meat, dairy and fish products.

The annual inflation rate increased for the third consecutive month to 8.3 percent in October, with the cost of food and non-alcoholic

Russian Federation Crop calendar (*major foodcrop)

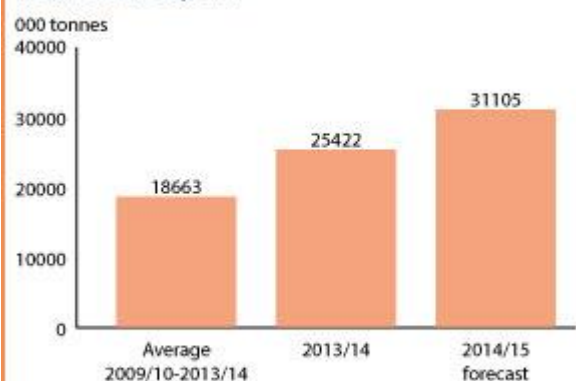


Russian Federation Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	49 856	52 100	60 800	17
Barley	14 943	15 400	20 800	35
Maize	6 847	11 635	12 000	3
Others	9 891	10 478	10 482	0
Total	81 537	89 613	104 082	16

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation Total cereal exports

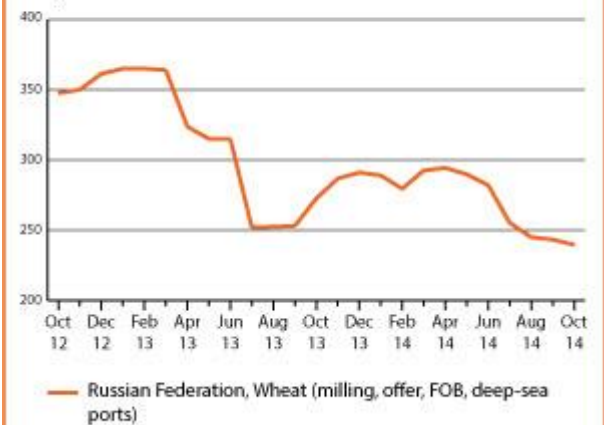


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

beverages increasing by 11.5 percent year-on-year.

The Russian Federation Export price of milling wheat

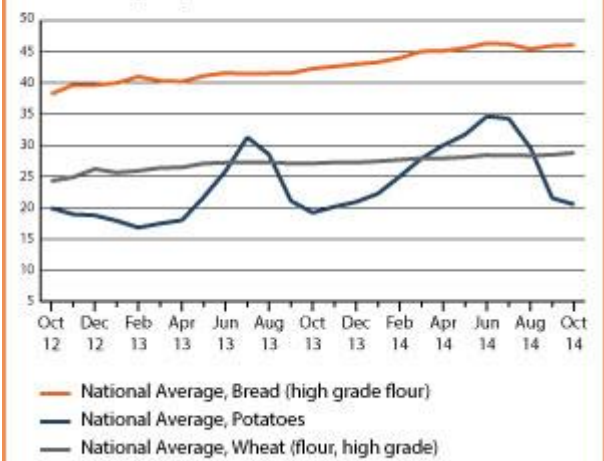
USD per Tonne



Source: APK-Inform Agency

Russian Federation Selected retail food prices

Russian Ruble per Kg



Source: Ministry of Agriculture of the Russian Federation

Reference Date: 15-September-2014

FOOD SECURITY SNAPSHOT

- The 2014 aggregate cereal harvest estimated at a near-record level
- Exports in 2014/15 marketing year (July/June) forecast at a record level
- Export wheat prices continue to decline

The 2014 aggregate cereal harvest estimated at a near-record level

Harvesting of the 2014 cereal crops, including wheat, barley and maize has been almost completed. The aggregate cereal harvest is put at 102 million tonnes, up 14 percent from last year's good output. Most of the growth is estimated on account of a strong increase in production of wheat and barley estimated at 59 and 20 million tonnes, respectively.

This is the result of higher yields, following favourable weather conditions throughout the cropping season and continued Government support to the sector. Planting of winter cereal crops started in mid-August under generally favourable weather conditions. Early indications point to an increase in area planted to winter cereals to 16.5 million hectares.

Exports in 2014/15 marketing year (July/June) forecast at a record level

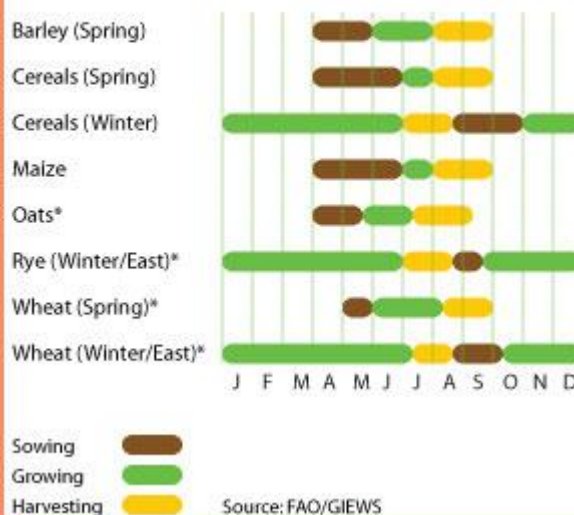
Cereal exports in the current 2014/15 marketing year (July/June) are forecast at a record level of 29.7 million tonnes, or 17 percent higher than last year's high level. Wheat represents about 76 percent of exports and the remaining is barley, maize and rye. The largest part of exports is shipped to Egypt, Turkey and the Islamic Republic of Iran. The Russian Government announced on 6 August the ban for one year of most food imports from the United States, the European Union, Norway, Canada and Australia, due to international sanctions imposed following the Ukraine political crisis. The ban, which does not include U.S. rice and wild rice, would be effective on imports of meat, fish, nuts, fruits, vegetables and milk products from 13 August 2014.

Export wheat prices continue to decline

Wheat export quotations continued to decline in August, but at a slower pace compared to the previous month and were slightly below their year-earlier levels. The downward pressure on prices from the bumper 2014 winter harvests was partly offset by strong export demand that contributed to the slowing price decreases. Prices of potatoes, another important food staple, decreased seasonally for the second consecutive month in August though remained higher than their level at the same time in 2013.

Russian Federation

Crop calendar (*major foodcrop)



Russian Federation

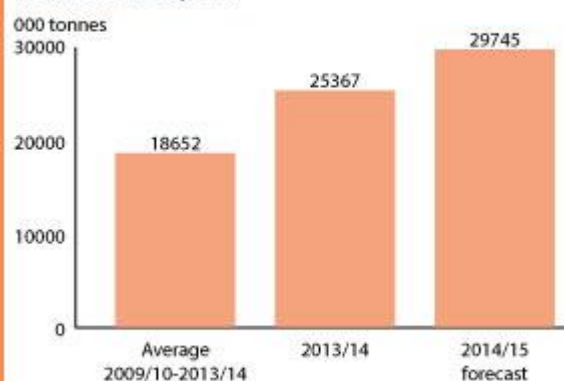
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	49,856	52,100	59,000	13
Barley	14,943	15,400	20,000	30
Maize	6,847	11,635	13,000	12
Others	9,891	10,478	9,982	-5
Total	81,537	89,613	101,982	14

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation

Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The Russian Federation Export price of milling wheat

USD per Tonne

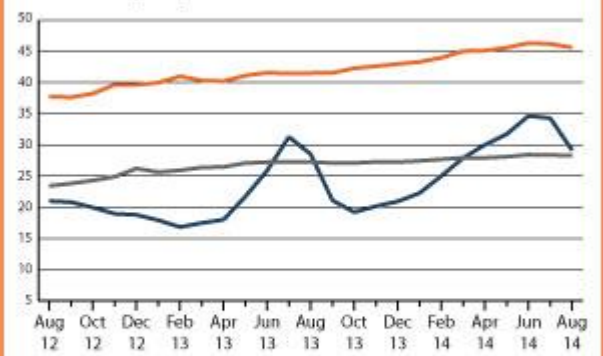


— Russian Federation, Wheat (milling, offer, FOB, deep-sea ports)

Source: APK-Inform Agency

Russian Federation Selected retail food prices

Russian Ruble per Kg



— National Average, Bread (high grade flour)

— National Average, Potatoes

— National Average, Wheat (flour, high grade)

Source: Ministry of Agriculture of the Russian Federation

Reference Date: 20-June-2014

FOOD SECURITY SNAPSHOT

- Favourable prospects for cereals production in 2014
- Cereal exports in 2014/15 forecast around the previous year's level
- Food prices higher than a year earlier

Favourable prospects for cereals production in 2014

The 2014 winter cereal crops are about to be harvested. Prospects are favourable following a mild winter and limited winterkill which contributed to normal development of the crops. Latest reports indicate that 65 percent of the cereal crops are rated in good conditions and 31 percent in satisfactory conditions.

Planting of spring cereal crops is almost completed under generally favourable weather conditions. The area planted to spring wheat is estimated at 13 million hectares, up 1 million hectares compared with 2013, while that under barley is put at 8.5 million hectares and that of maize at 2.6 million hectares.

Assuming normal weather conditions in the coming months, the 2014 aggregate cereal output is forecast to reach 87.9 million tonnes, close to last year's good level. Production of all cereals, wheat, barley, maize, rye, oats and millet, is anticipated to be similar to last year's level.

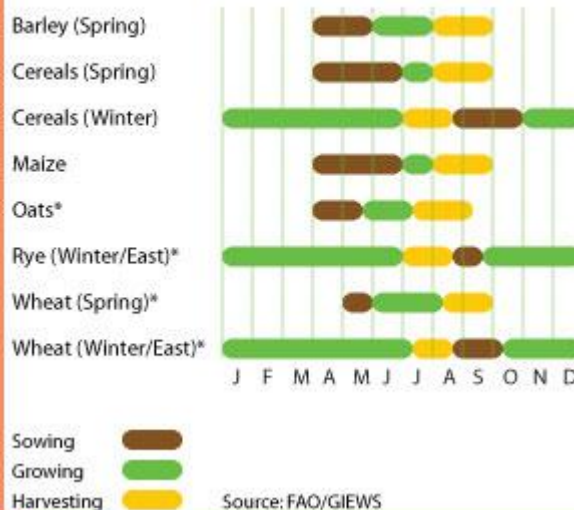
Exports in 2014/15 marketing year (July/June) forecast slightly lower than in 2013/14

Cereal exports in the forthcoming marketing year are anticipated to reach 24.9 million tonnes, 4 percent below last year's level. Wheat represents about 77 percent of exports and the remaining is barley, maize and rye. Although the Russian Federation is one of major supplier of cereals to CIS countries, the largest part of exports is channelled to the rest of the world, including Egypt, Turkey, the Islamic Republic of Iran and others.

Food prices are overall increasing

Despite the weakening of export prices of wheat in the past two months reflecting good expectations for the 2014 harvest, retail prices wheat flour and bread in June remained stable and higher than a year earlier, particularly for bread. Prices of potatoes, another important food staple, have been increasing seasonally in the past months but in June were 47 percent higher than their level at the same time in 2013.

Russian Federation Crop calendar (*major foodcrop)

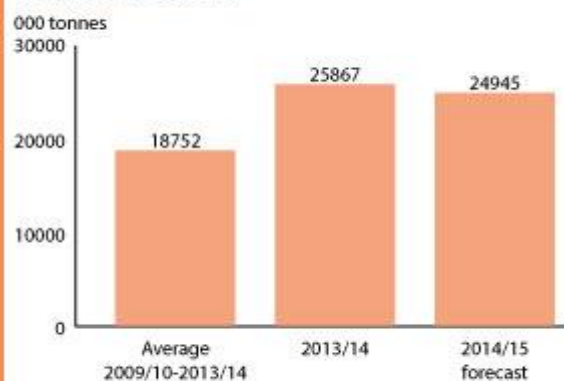


Russian Federation Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	49 856	52 100	52 000	0
Barley	14 935	15 357	15 200	-1
Maize	6 657	10 682	10 700	0
Others	9 891	10 478	9 982	-5
Total	81 338	88 617	87 882	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

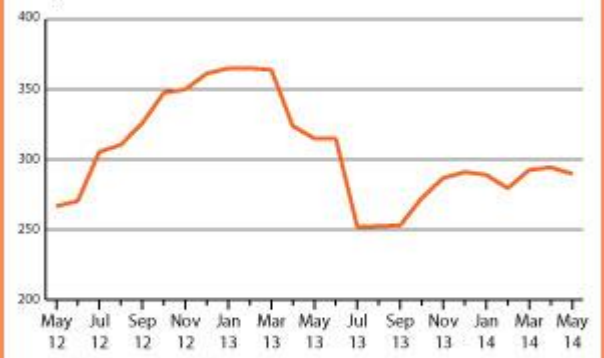
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The Russian Federation Export price of milling wheat

USD per Tonne

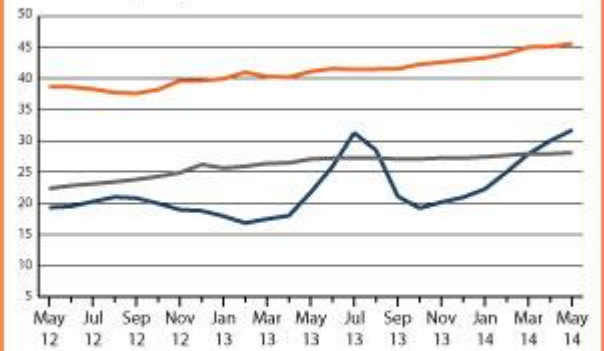


— Russian Federation, Wheat (milling, offer, FOB, deep-sea ports)

Source: APK-Inform Agency

Russian Federation Selected retail food prices

Russian Ruble per Kg



— National Average, Bread (high grade flour)
 — National Average, Potatoes
 — National Average, Wheat (flour, high grade)

Source: Ministry of Agriculture of the Russian Federation

Reference Date: 22-March-2013

FOOD SECURITY SNAPSHOT

- Early prospects for 2013 cereal winter crops are satisfactory
- Sharply reduced 2012 cereal production
- Significant decline of cereal exports expected in 2012/13 (July/June)
- Export wheat prices are still high

Early prospects for 2013 cereal winter crops are satisfactory

According to the Russian Hydro-meteorological Service, winter cereal conditions in the Russian Federation had improved substantially by the beginning of March 2013. The previously estimated loss was 1.6 million hectares, or 10 percent. This area has now shrunk to 1.2-1.5 million hectares, or 8-9.5 percent which is the smallest size of poor plantings since 2008/2009. Although the conditions for winter crops in 2012/13 are satisfactory overall, some local problems have been reported in the Volgograd region and its neighbouring territories. These problems include snow thawing and the area of poor plantings increasing at the expense of regions affected by December's low temperatures.

By contrast, there was a notable improvement in the condition of winter grain as of the latter half of February, especially in the Southern regions of the country including Krasnodar and Stavropol.

According to operative data from the Russian Federation, some regions of the Southern and Northern Caucasian Federal Districts have started planting spring crops. Also, farms in the reporting regions continue to see further fertilization. According to official information, in 2013, agricultural households of all types in the Russian Federation plan on planting spring crops across an area of 50.9 million hectares, including spring grains on around 30 million hectares. This could allow for a harvest of about 90 million tonnes, including 84-86 million tonnes of cereals.

Sharply reduced 2012 cereal production

Severe drought and extremely hot temperatures in some key growing areas of the country during July and August adversely affected production in 2012. The 2012 cereal output is estimated to be 69.8 million tonnes, which is 24 percent down on 2011. Production of wheat – the most affected crop – is estimated to be 32 percent lower than in 2011.

A notable decrease in the production of barley (17 percent), rye (16 percent), oats (10 percent) and millet (43 percent) was reported. By contrast, 2012 maize production increased by 16 percent, or over 8 million tonnes.

Significant decline of cereal exports expected in 2012/13 (July/June)

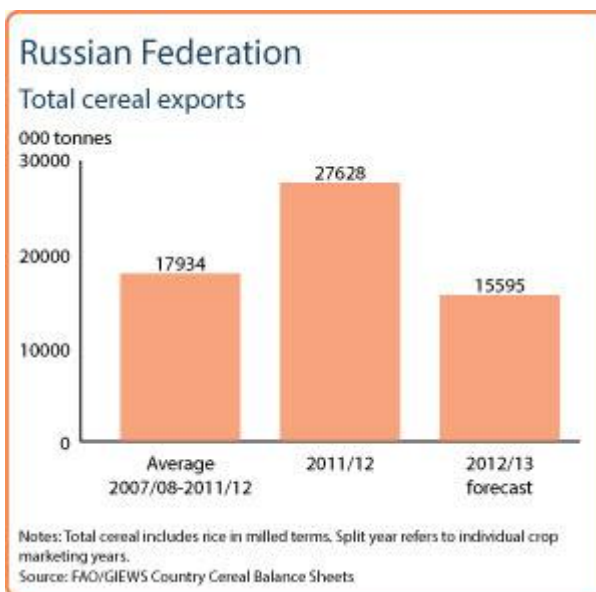
The Government has not introduced restrictions on grain exports despite the poor harvest 2012. However, the total cereal export potential of the country is expected to drop from some 28 million tonnes



Russian Federation Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	54,545	56,230	38,000	-32
Barley	16,826	16,935	14,000	-17
Oats	5,034	5,334	4,800	-10
Others	10,890	12,977	12,966	0
Total	87,295	91,476	69,766	-24

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



in the 2011/12 marketing year (July/June) to about 16 million tonnes in 2012/13. The import of cereals has significantly increased, reflecting the poorer harvest in 2012. Wheat imports account for about 77 percent of total cereal imports, most of which come from Kazakhstan to the Siberian part of the Russian Federation. The Government has officially announced plans to buy wheat on the domestic market between August and October in order to replenish intervention stocks after last year's drought. The Government is still considering the possibility of eliminating the 5 percent duty on grain imports, including wheat, rye, barley and maize, until August 2013.

Export wheat prices are still high

Export prices of wheat in the Russian Federation did not change during the first three months of this year and in March 2013 they are still 33 percent higher than they were a year previously. This mainly reflects the slow pace of trade activity due to both lower demand and reduced export availabilities following sharp contractions in 2012 wheat outputs. Domestic prices of wheat and wheat flour in the country remained firm and even slightly decreased in March as a result of the continuing release of grain from state reserves and in expectation of the 2013 harvest.

Retail prices on bread, wheat flour, and milk have increased by 5, 17, and 7 percent respectively year-on-year, whereas the prices of potatoes and pork have decreased slightly for the same period (by 10 and 3 percent respectively). The food situation in the country varies from region to region: High levels of unemployment in the Northern Caucasian republics, coupled with increasing food prices mean that there is a threat of localized food insecurity.



Reference Date: 18-September-2012

FOOD SECURITY SNAPSHOT

- Dry and hot weather sharply reduced the 2012 cereal crops
- Cereal exports, mainly wheat, expected to decline significantly in 2012/13 marketing year (July/June)
- Export wheat prices increased by 15 percent in the past two months

Sharply reduced 2012 cereal production

Harvesting of the 2012 cereal crops has been almost completed, except for maize. Severe drought and extremely hot temperature in July and August in some key growing areas of the country adversely affected this year's production. The aggregate cereal output is put at 70 million tonnes, around 23 percent below the 2011 level. The most affected wheat crop is estimated at about 39 million tonnes, 30 percent lower than last year.

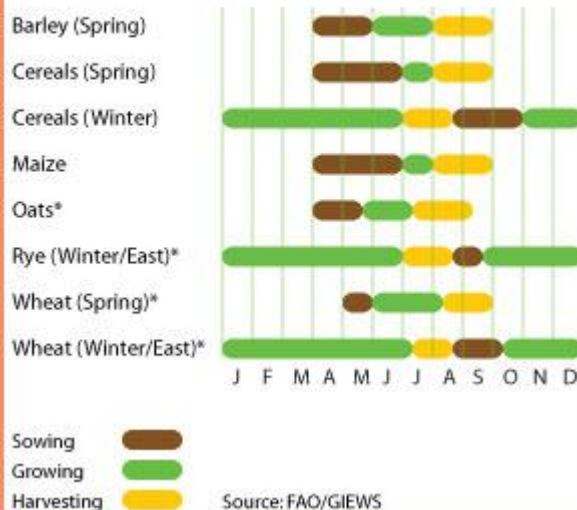
Significant decline of cereal exports expected in 2012/13 (July/June)

The Government has confirmed that, in spite of the 2012 poor harvest, it has no intention to introduce restrictions on grain exports as it did in 2010/11 marketing year (July/June). However, the total cereal export potential of the country is foreseen to drop from some 28 million tonnes in 2011/12 to about 12 million tonnes, mainly wheat, in the current season. The country has become one of the main exporters of wheat since 2008/09 marketing year and was the second largest exporter last year, accounting for about one-quarter of global wheat exports.

Export wheat prices on the increase

Wheat export quotations rose by 15 percent in July and August reflecting reduced export availabilities following the 2012 reduced harvest. In August wheat export prices were 23 percent higher than a year earlier. However, domestic wholesale prices of milling wheat have risen at a slower pace and in August were 8 percent higher than in June before the increase.

Russian Federation Crop calendar (*major foodcrop)

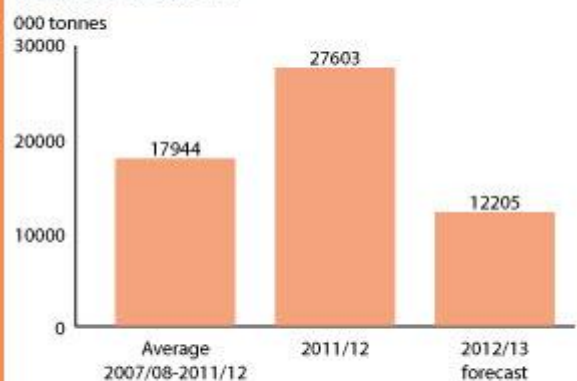


Russian Federation Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	54 545	56 230	39 000	-31
Barley	16 826	16 935	14 000	-17
Oats	5 034	5 334	4 800	-10
Others	10 919	13 121	12 454	-5
Total	87 324	91 620	70 254	-23

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

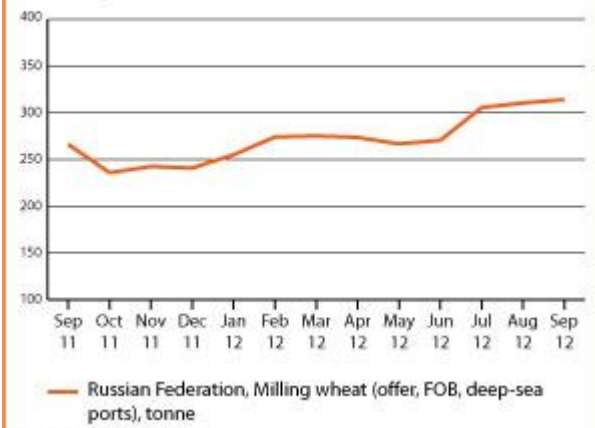
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The Russian Federation Export price of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 19-April-2012

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2012 cereal crops
- Cereal exports expected to increase significantly in 2011/12 marketing year (July/June)
- Wheat prices remain at relatively high levels

Favourable prospects for 2012 cereal crops

Winter cereal crops, mainly wheat and some rye, are at the vegetative development stage. Latest indications point to a marginal increase in the area planted in response to continuing strong prices. Average levels of winterkill are reported despite periods of severe cold, as most crops were protected by ample snow cover. Adequate precipitation and warm weather in March benefited developing crops and by early April, 94 percent of the crops were assessed in good or satisfactory conditions.

Planting of the 2012 spring cereal crops (wheat, barley, maize and oats) is underway after some delays due to the late arrival of the season. Early prospects are positive reflecting an expected increase in the area planted.

Assuming normal growing conditions for the remainder of the cropping season, the 2012 wheat output is forecast at 56.8 million tonnes, some 1 percent up from the 2011 good crop, with an increase in area planted partially compensated by a return to normal yields after high levels last year. The aggregate cereal production is tentatively forecast at 92.2 million tonnes, marginally up from 2011 good result.

Cereal output recovered in 2011

The 2011 cereal production recovered from the drought-devastated harvest of 2010 that prompted the adoption of a ban on cereal exports in marketing year 2010/11 (July/June). The aggregate cereal output was estimated at about 92 million tonnes, 45 percent above the previous year's level. Wheat, barley and maize outputs increased by 35, 61 and 115 percent respectively.

Significant increase of cereal exports forecast in 2011/12 (July/June)

The country has become one of the main exporters of wheat since 2008/09 marketing year. For the current marketing year 2011/12, exports of cereals are forecast at around 26.1 million tonnes, including 21.5 million tonnes of wheat. This compares with a reduced level of 4.4 million tonnes of cereals in the previous marketing year. Currently, no export restrictions are in place.

Prices of wheat at high levels

Wholesale wheat prices, which were on the increase since December 2011 reflecting concerns about the 2012 wheat crop in the subregion, remained virtually unchanged in the first two weeks of April. Improved crop prospects in the country and new intervention sales by the Government contributed to the price stabilization. However, wheat prices remained similar to their high levels at the same time last year and more than 70 percent up from April 2010.

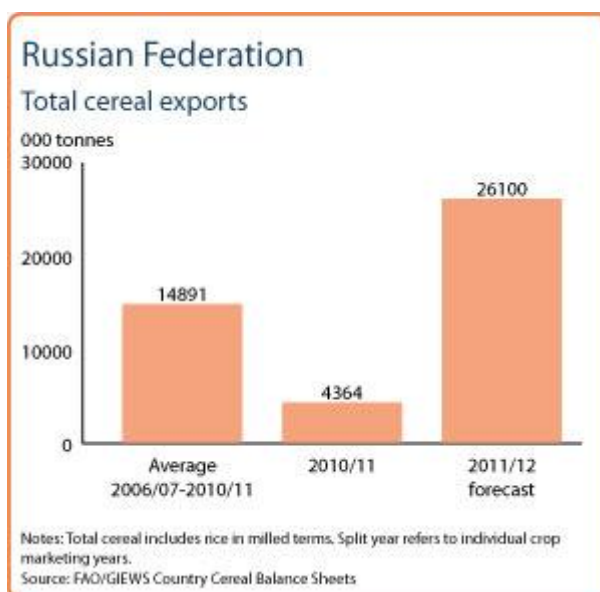


Russian Federation

Cereal production

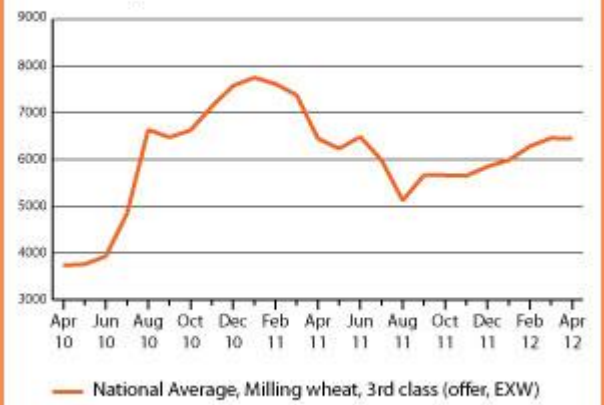
	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	54 545	56 230	56 800	1
Barley	16 826	16 935	17 100	1
Oats	5 034	5 334	5 300	-1
Others	10 919	13 121	13 084	0
Total	87 324	91 620	92 284	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Russian Federation Wholesale prices of milling wheat

Russian Ruble per tonne



Source: APK-Inform Agency

Reference Date: 14-February-2012

FOOD SECURITY SNAPSHOT

- Early prospects for 2012 cereal winter crops are satisfactory
- Cereal production recovered in 2011
- Cereal exports are expected to increase significantly during the 2011/12 marketing year (July/June)
- Food prices stabilized

Early prospects for 2012 winter crops are satisfactory

Conditions of 2011/12 winter crops are overall favourable, though some local problems are reported in the southern regions, where crops were exposed to frosts without adequate snow cover. By contrast, substantial snow cover continued to protect winter crops in other parts of the Russian Federation. Winter cereal crop planting is estimated 11 percent higher than last year (13.1 million hectares) due to beneficial weather conditions at sowing time. Assuming normal conditions, a slight increase in spring wheat plantings is expected and the total planted area under cereals is forecasted at some 26.5 million hectares.

Cereal output recovered in 2011

In 2011, the country's cereal production recovered from the severely drought-reduced crop of 2010. The aggregate cereal production was estimated at 91 million tonnes, 45 percent above the previous year's level. Wheat, barley and maize outputs increased by 35, 61 and 115 percent respectively.

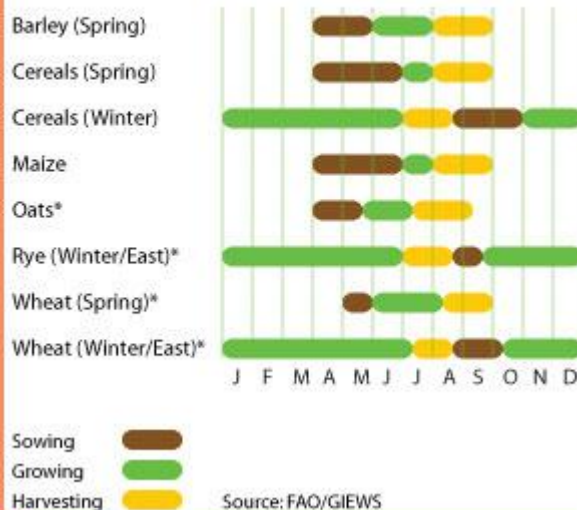
A significant increase of cereal exports is forecast for 2011/12 marketing year (July/June)

The country became one of the main exporters of wheat in previous years and exported around 18 million tonnes in the 2009/10 marketing year (July/June). In the last marketing year a sharp decrease to 4 million tonnes of exported wheat was recorded because of the significant reduction of 2010 production followed by the imposition of a ban on grain exports. For the current marketing year 2011/12, exports of cereals are forecast at around 24.7 million tonnes, including 20.5 million tonnes of wheat, 2.5 million tonnes of barley and 1.3 million tonnes of maize. A possible imposition of customs duties on grain exports will not be considered before 1 April 2012.

Food prices stabilized in the past year

Prices of wheat flour have sharply declined and prices of bread stabilized since March 2011, while those of potatoes dropped significantly due to the 2011 good harvest. By the end of 2011, the retail price for bread and pork meat slightly increased reflecting general inflation which has been officially reported at 6.1 percent. The food situation differs among regions of the country: high level of unemployment in the North Caucasian republics, coupled with increasing food prices, creates threats for localized food insecurity.

Russian Federation Crop calendar (*major foodcrop)

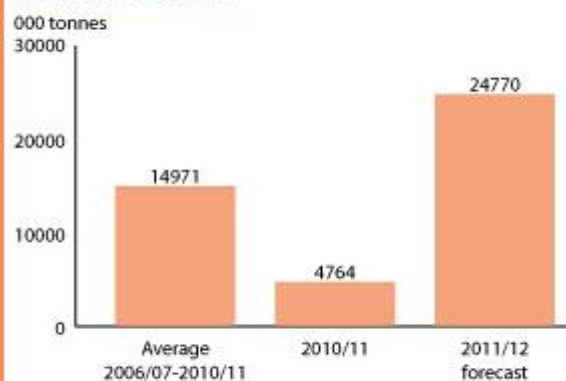


Russian Federation Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	52 300	41 500	56 230	35
Barley	17 069	10 500	16 935	61
Oats	4 940	3 220	5 334	66
Others	10 045	7 507	12 540	67
Total	84 355	62 727	91 039	45

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

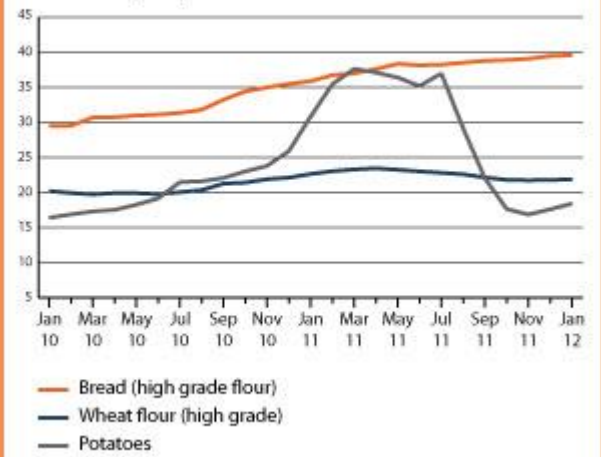
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation Selected retail food prices

Russian Ruble per Kg



Source: Ministry of Agriculture of the Russian Federation

Reference Date: 17-January-2012

FOOD SECURITY SNAPSHOT

- 2011 cereal production recovered strongly reaching bumper levels
- Cereal exports increased significantly during the first six months of the 2011/12 marketing year (July/June)
- Food prices stabilized

The 2011 cereal production has strongly recovered and reached bumper levels

In 2011 the country's cereal production recovered after last year's strong drought. Total cereal production is estimated at 91 million tonnes, 45 percent above last year's level. Wheat, barley and maize outputs increased by 35, 61 and 115 percent respectively.

Early forecast of the 2012 winter crops is satisfactory. Substantial rains, particularly around the Black Sea and in southern regions, improved soil moisture and allowed planting to progress. Relatively warm winter weather contributed to good growing of winter crops. The area planted to winter cereals has increased over 1 million hectares, 8 percent higher than last year's level but still lower than in 2009.

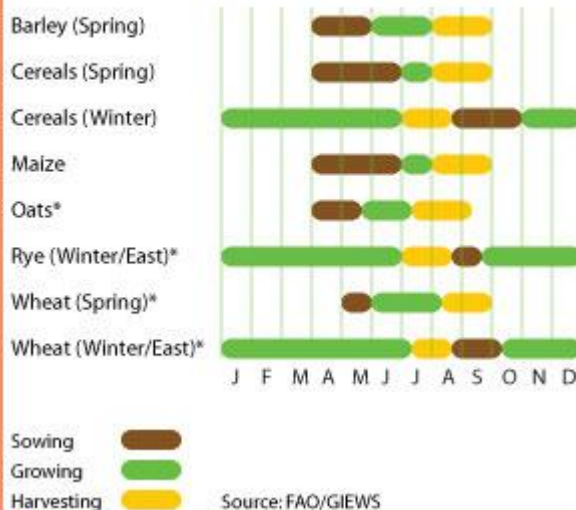
Cereal exports increased significantly during the first six months of the 2011/12 marketing year (July/June)

The country became one of the main exporters of wheat in the previous years and exported around 18 million tonnes in the 2009/10 marketing year (July/June). However, in last marketing year wheat exports decreased to 4 million tonnes because of the significant reduction of the 2010 production followed by the imposition of a ban on grain export. For the current marketing year the export of cereals is forecast at around 23 million tonnes including 20 million tonnes of wheat, 2.2 million tonnes of barley and 1.1 million tonnes of maize.

Wheat flour and bread prices stable in November

Wheat flour prices remained relatively stable in November, after declining moderately in the previous months due to improved availabilities from the good 2011 harvest. Prices were 7 percent below the record highs reached in April 2011 and close to their levels at the same month a year earlier. Despite the declines of wheat flour quotations, bread prices in November were still at high levels and 12 percent higher than a year earlier. Prices of potatoes, a major staple in the country, dropped significantly since August with the 2011 harvest and were nearly 30 percent below their levels in November 2010.

Russian Federation Crop calendar (*major foodcrop)

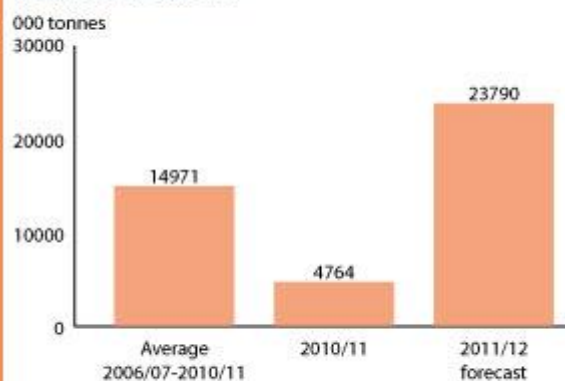


Russian Federation Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	52 300	41 500	56 230	35
Barley	17 069	10 500	16 935	61
Oats	4 936	3 200	5 334	67
Others	10 053	7 573	12 562	66
Total	84 358	62 773	91 061	45

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

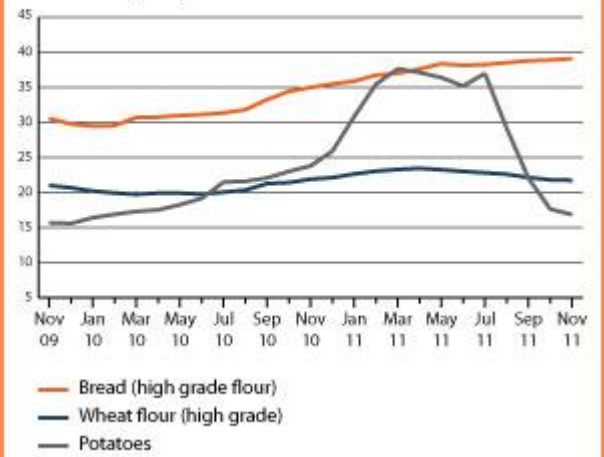
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation Selected retail food prices

Russian Ruble per Kg



Source: Ministry of Agriculture of the Russian Federation

Reference Date: 18-May-2011

FOOD SECURITY SNAPSHOT

- Early prospects for the 2011 cereal crops are favourable
- Cereal export ban to be reconsidered after the completion of harvest in 2011
- Food prices remain at high levels

Early prospects for the 2011 cereal crops are favourable

Sowing of spring crops started with delays and it is ongoing under so far favourable growing conditions. The target area planted has been set at an above normal level of 30 million hectares, to compensate for reductions in area under 2011 winter cereals, which decreased to 15 million hectares because of delayed sowing due to insufficient soil moisture following severe drought last year. Winter crops were not significantly damaged during the winter months this year and only 10 percent of the total winter planted crops are reported in unsatisfactory conditions and normal yields are expected assuming that favourable growing conditions continue in the next month.

Early forecast of the 2011 aggregate cereal production (winter and spring crops) indicate that the cereal harvest could reach some 84 million tonnes, one-third higher than last year's drought-reduced crop. This forecast assumes normal weather during the remaining of the cropping season.

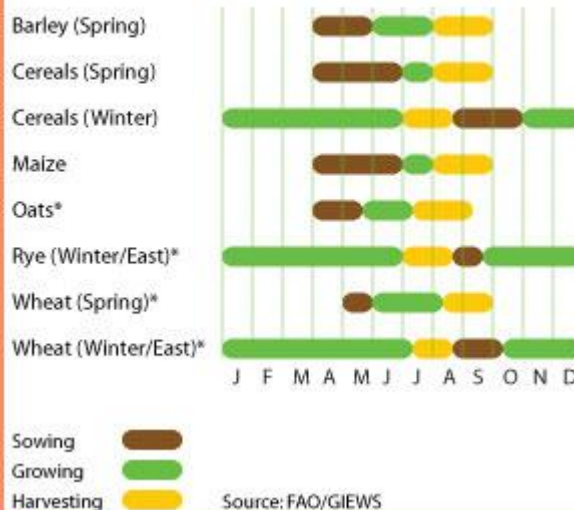
Cereal export ban to be reconsidered after the completion of harvest in 2011

The country became one of the main exporters of wheat in the previous three years and exported around 20.4 million tonnes in the 2009/10 marketing year (July/June). The export availability for the 2010/11 marketing year is estimated down to 4.9 million tonnes because of the significant reduction of the 2010 production followed by the imposition of a ban on grain export. This is the lowest level of the last decade. The export ban may be lifted after the completion of the harvest in 2011.

Food prices remain at high levels

Since July 2010 a steady increase of staple food prices has been observed reflecting the sharp decline in production and trends in the international cereal markets. However, prices of wheat flour and bread stabilized in March and April, following sales of grains from the state intervention reserves from early February. National average prices of wheat flour and bread in April were 20 and 31 percent respectively higher compared with the same period a year ago. Prices of potato, beef, milk and sugar are also well above their levels of a year earlier. In particular, prices of potatoes in April 2011 were 112 percent higher than a year ago; low supplies of potatoes forced the country to import large quantities of the commodity. The food situation significantly differs by regions. High level of unemployment in the North Caucasian republics, coupled with increasing food prices creates threats for localized food insecurity.

Russian Federation Crop calendar (*major foodcrop)

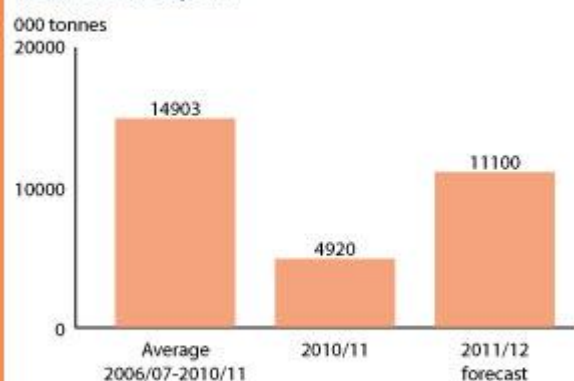


Russian Federation Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	52 300	41 500	55 000	33
Barley	16 639	8 350	13 200	58
Oats	4 936	3 200	5 000	56
Others	9 858	6 062	9 744	61
Total	83 884	60 073	83 544	39

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

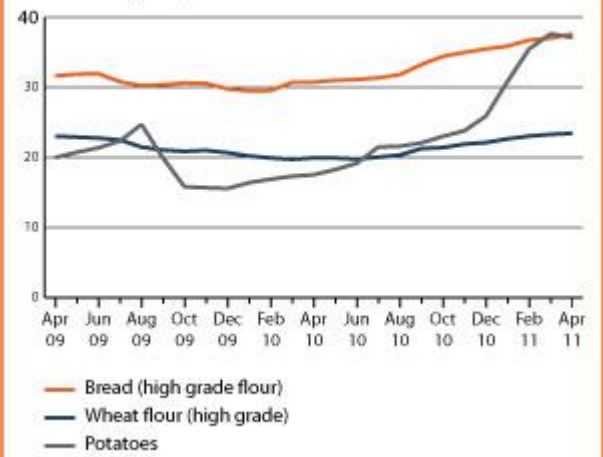
Russian Federation Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

Russian Federation Selected retail food prices

Russian Ruble per kg



Source: Ministry of Agriculture of the Russian Federation