

# Impact of the Russia's invasion of Ukraine on grain and oilseeds production and international trade

**Antonina Broyaka**

Extension Associate of Agricultural Economics Department,  
Kansas State University

*PhD in Economics, Associate Professor from Ukraine*

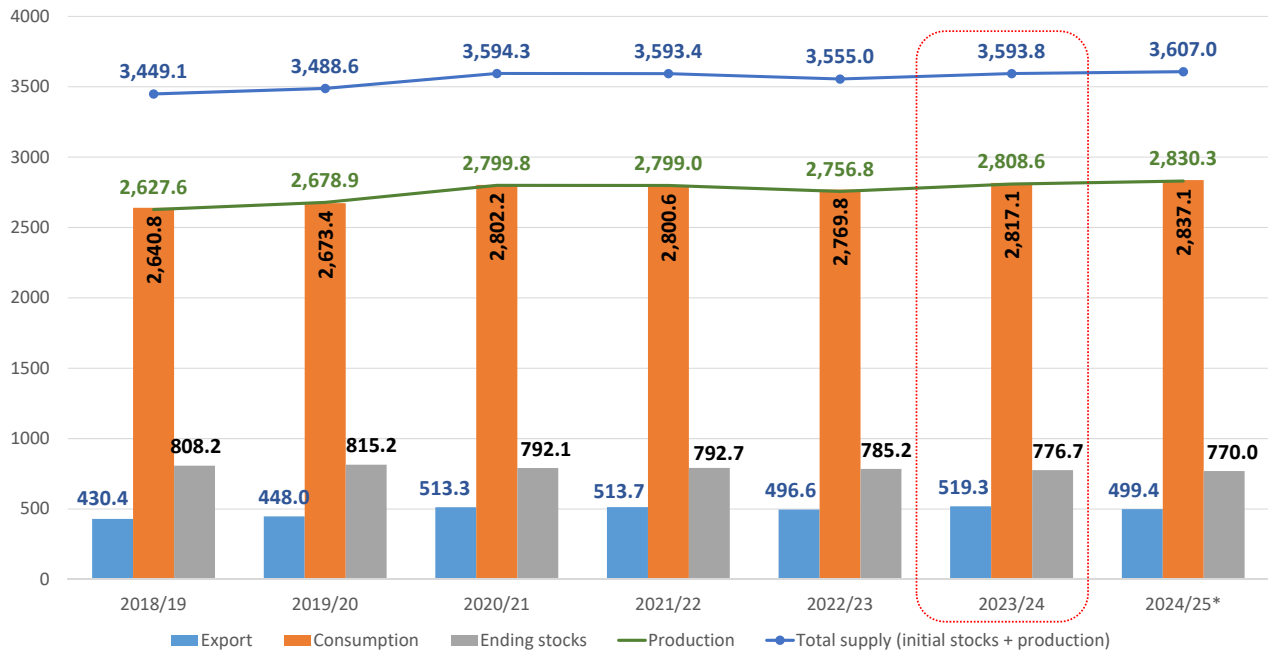
**KANSAS STATE**  
UNIVERSITY Agricultural Economics

## OUTLINE:

- Does the war affect world grain markets?
- Current state of grain and oilseed production in Ukraine
- Current state and 2024/25 forecast of grain and oilseed exports from Ukraine
- Dynamics of grain and oilseed world prices
- Long-term forecast of grain and oilseed production and exports from Ukraine
- Grain and oilseeds production and exports from Russia

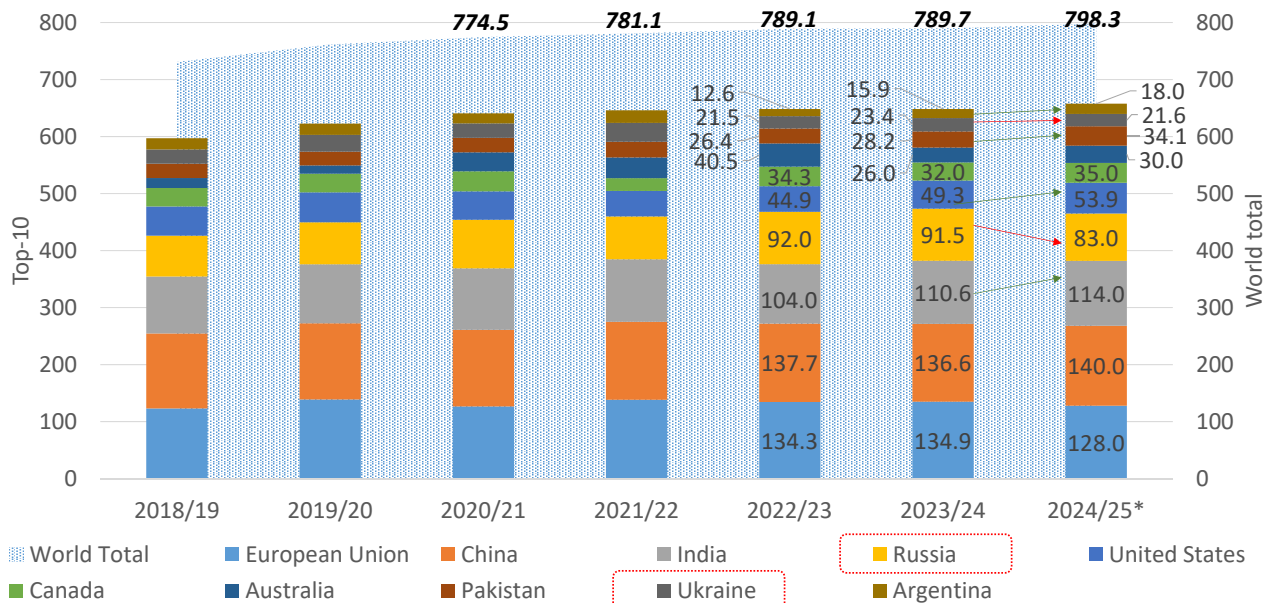


**DYNAMICS OF WORLD GRAIN DEMAND AND SUPPLY, million metric tonnes**  
(forecast as of August 12, 2024)



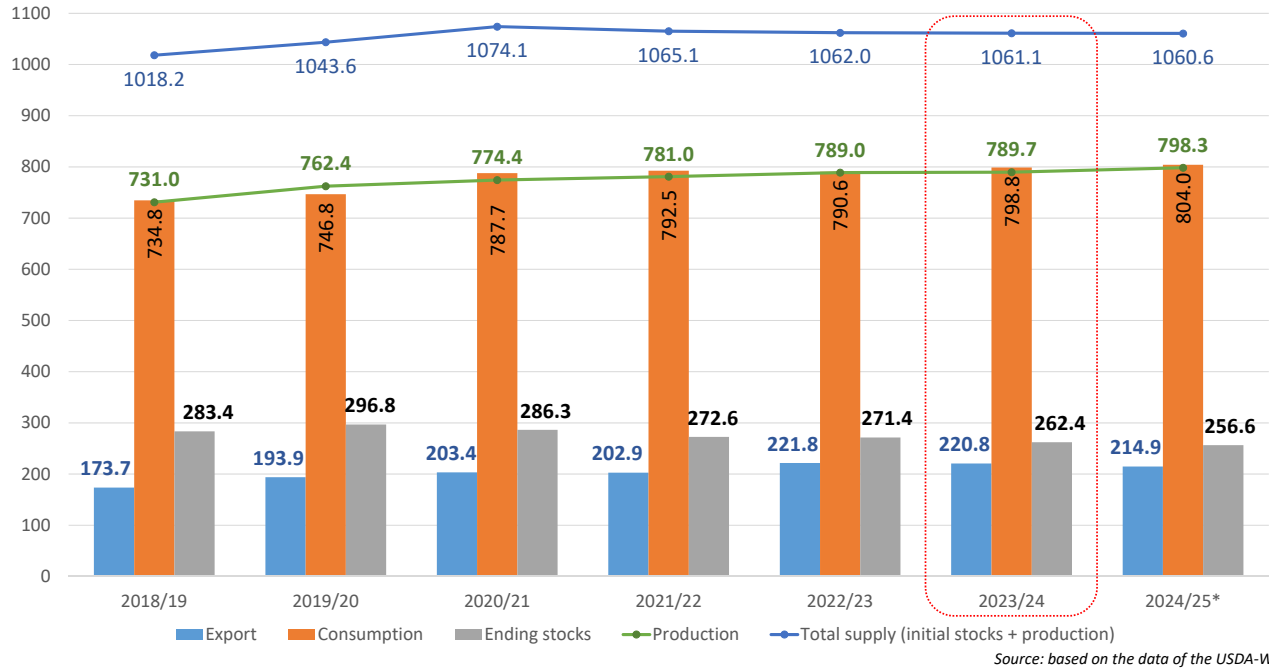
Source: based on the data of the USDA-WASDE

**DYNAMICS OF WORLD WHEAT PRODUCTION, million metric tonnes**  
(forecast as of August 12, 2024)

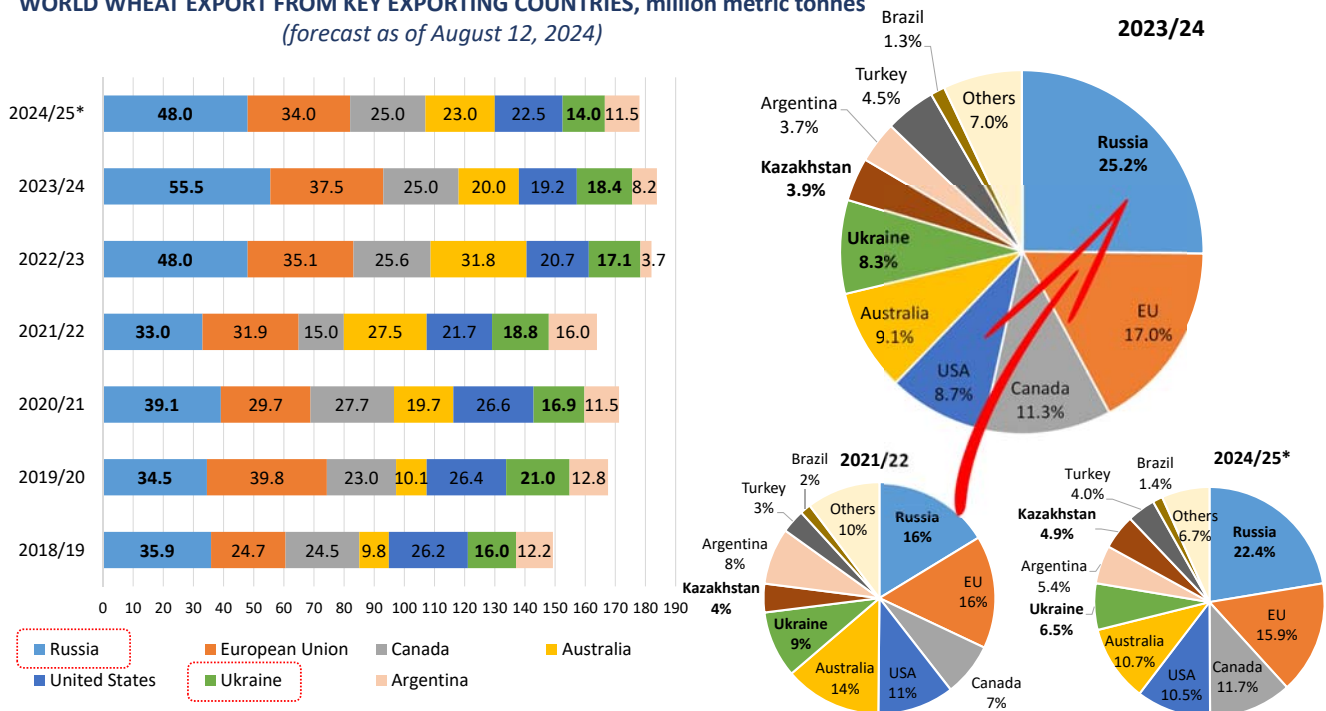


Source: based on data of the USDA-WASDE

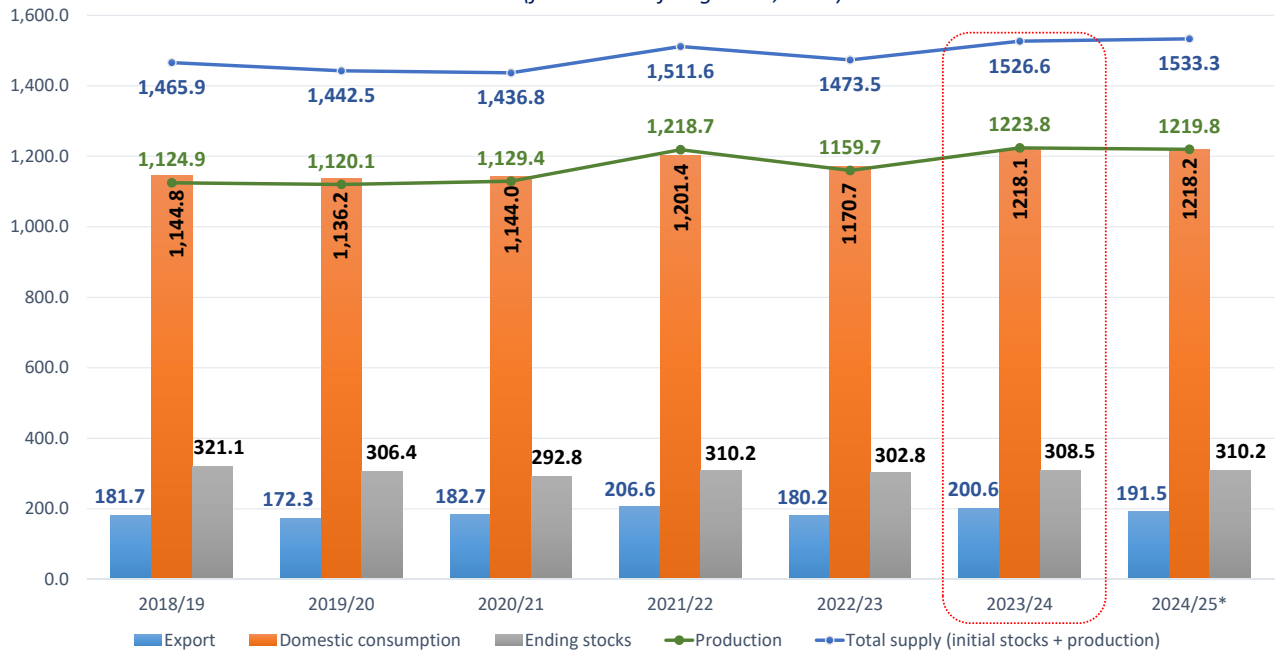
**DYNAMICS OF WORLD WHEAT DEMAND AND SUPPLY, million metric tonnes**  
(forecast as of August 12, 2024)



**WORLD WHEAT EXPORT FROM KEY EXPORTING COUNTRIES, million metric tonnes**  
(forecast as of August 12, 2024)



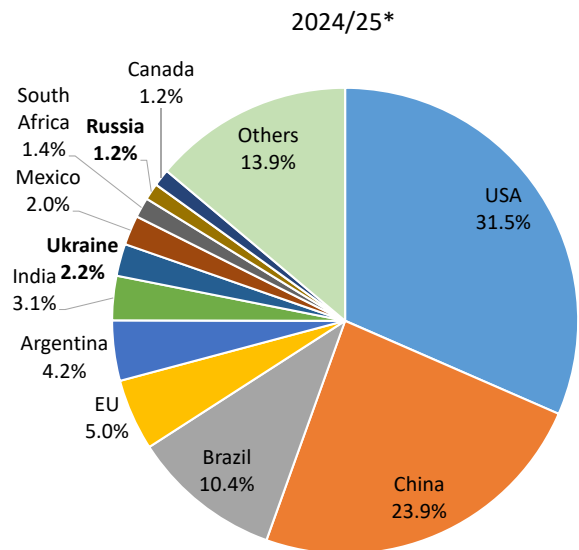
**DYNAMICS OF WORLD CORN DEMAND AND SUPPLY, million metric tonnes**  
(forecast as of August 12, 2024)



Source: based on the data of the USDA-WASDE

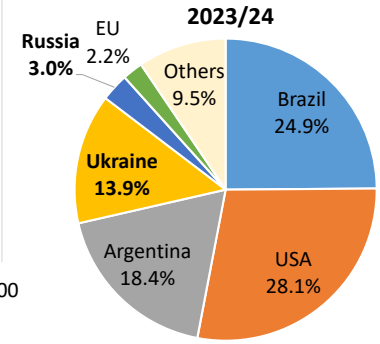
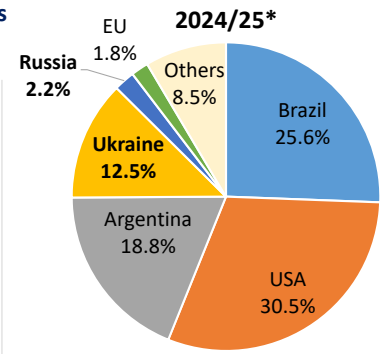
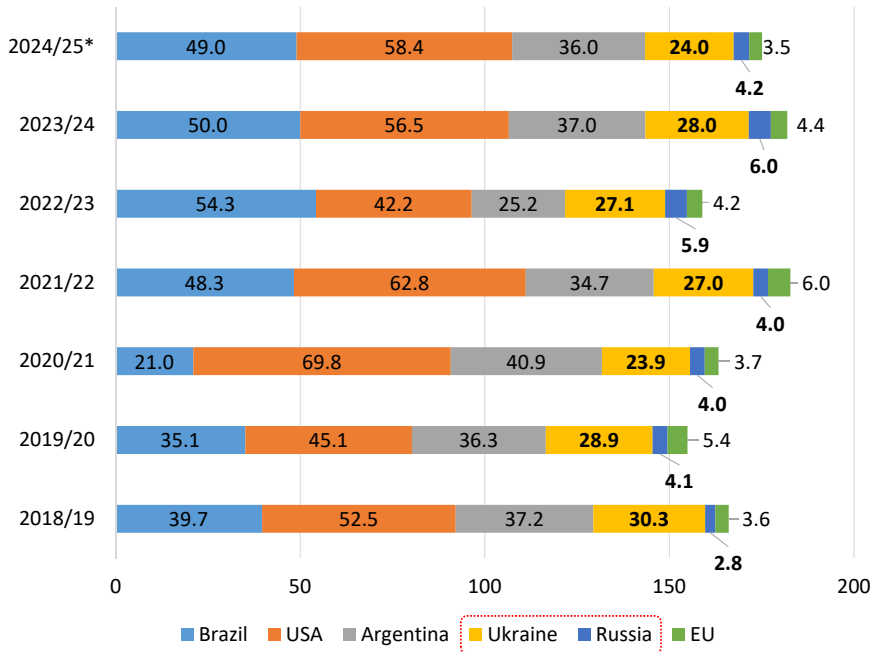
**WORLD CORN PRODUCTION, million metric tonnes**  
(forecast as of August 12, 2024)

№	Country	2021/22	2022/23	2023/24	2024/25*	change	
						2021/22	2023/24
1	USA	382.9	346.7	389.7	384.7	+0.5%	-1.3%
2	China	272.6	277.2	288.8	292.0	+7.1%	+1.1%
3	Brazil	116.0	137.0	122.0	127.0	+9.5%	+4.1%
4	EU	71.5	52.3	61.5	60.5	-15.4%	-1.6%
5	Argentina	49.5	36.0	50.0	51.0	+3.0%	+2.0%
6	India	33.7	38.1	37.5	37.5	+11.3%	0.0%
7	<b>Ukraine</b>	<b>42.1</b>	<b>27.0</b>	<b>31.0</b>	<b>27.2</b>	<b>-35.4%</b>	<b>-12.3%</b>
8	Mexico	26.8	28.1	22.7	25.0	-6.7%	+10.1%
9	South Africa	16.1	17.1	14.0	17.0	+5.6%	+21.4%
10	<b>Russia</b>	<b>15.2</b>	<b>15.8</b>	<b>16.6</b>	<b>14.1</b>	<b>-7.2%</b>	<b>-15.1%</b>
11	Canada	14.6	14.5	15.1	14.5	-0.7%	-4.0%
12	Indonesia	12.7	12.4	12.7	13.2	+3.9%	+3.9%
13	Nigeria	12.7	12.9	11.1	11.0	-13.4%	-0.9%
14	Ethiopia	9.4	10.2	10.0	10.2	+8.5%	+2.0%
15	Pakistan	10.6	11.0	9.8	9.5	-10.4%	-3.1%
	Others	132.2	123.2	131.3	125.4	-4.2%	-3.7%
	<b>Total</b>	<b>1,218.7</b>	<b>1,159.7</b>	<b>1,223.8</b>	<b>1,219.8</b>	<b>+0.1%</b>	<b>-0.3%</b>



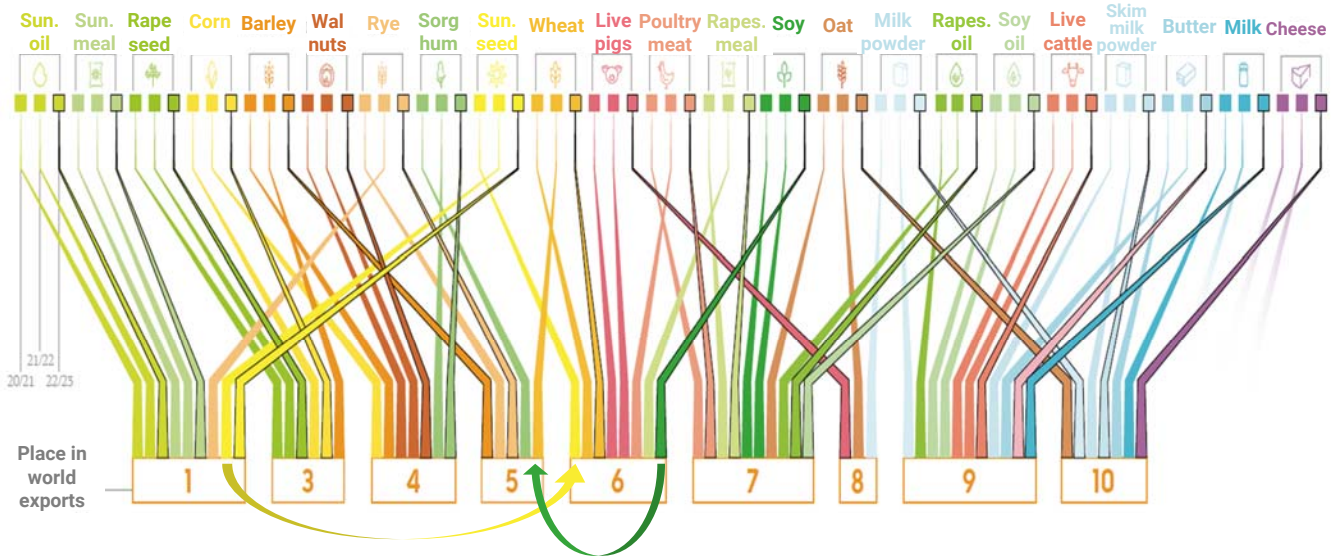
Source: based on the data of the USDA

**WORLD CORN EXPORT FROM KEY EXPORTING COUNTRIES, million metric tonnes**  
(forecast as of August 12, 2024)



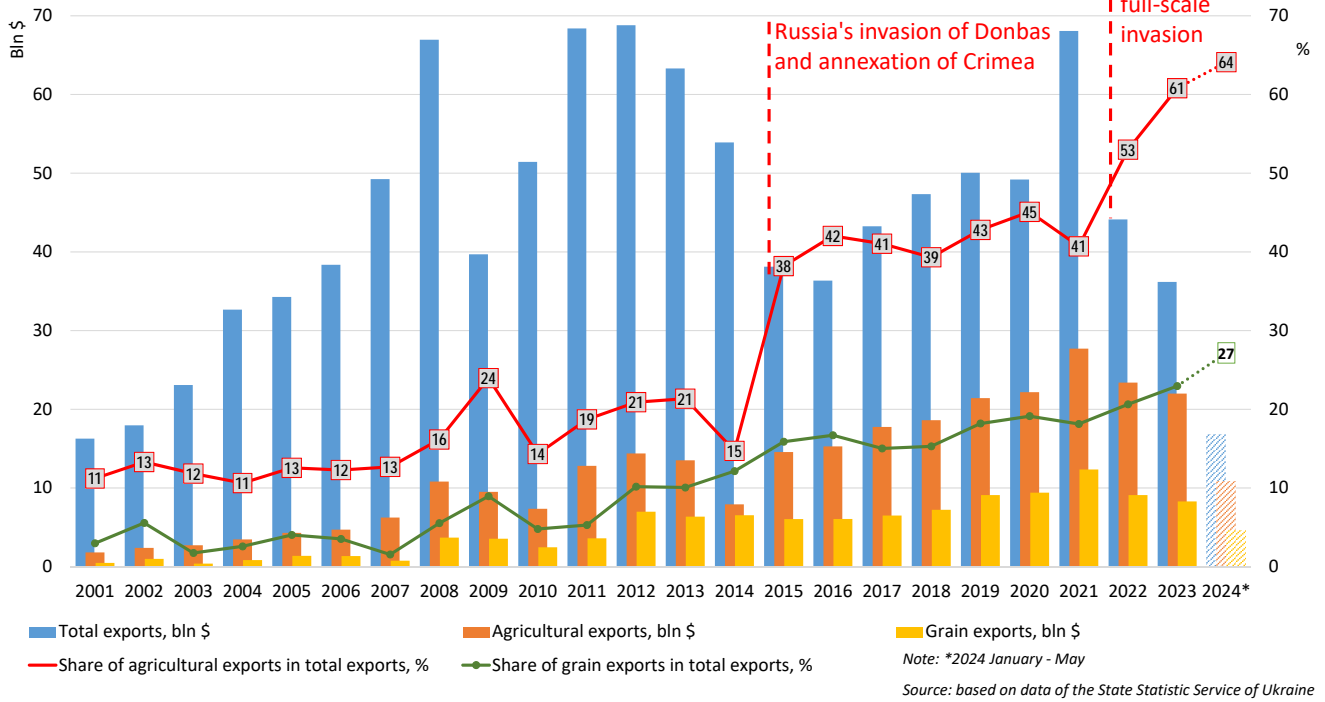
Source: based on the data of the USDA-WASDE

**UKRAINE'S PLACE IN WORLD EXPORTS**



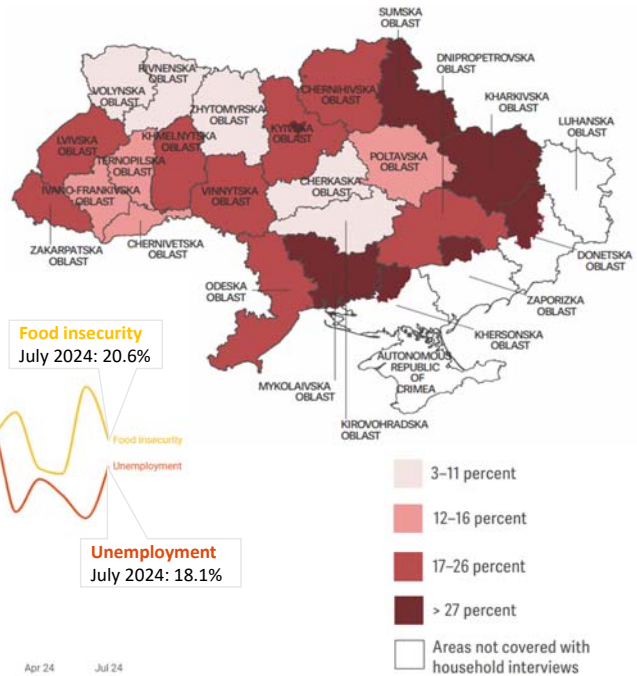
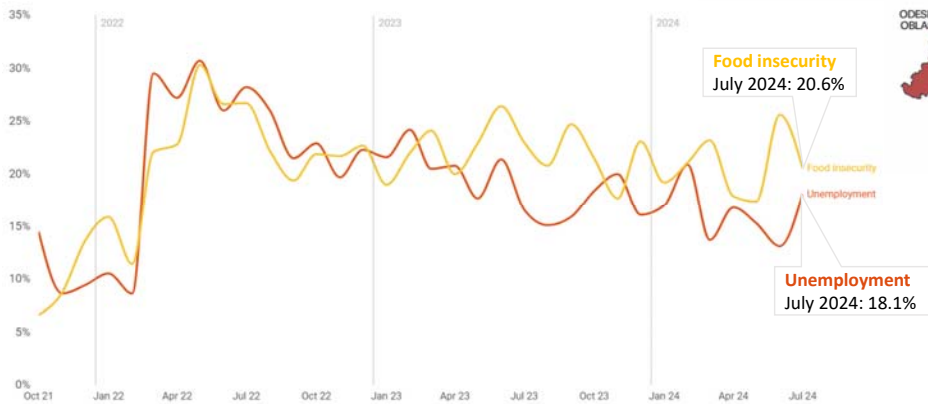
Source: Latifundist based on USDA, FAO

### THE IMPORTANCE OF AGRICULTURAL AND GRAIN EXPORTS IN THE ECONOMY OF UKRAINE



### PROPORTION OF HOUSEHOLDS FACING MODERATE OR SEVERE ACUTE FOOD INSECURITY IN UKRAINE

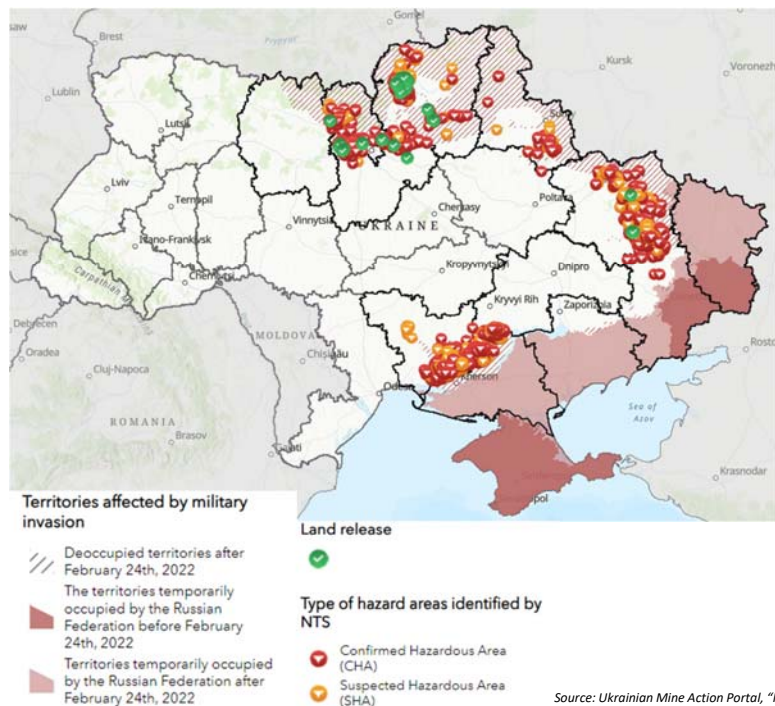
#### UNEMPLOYMENT LEVEL AND SHARE OF THOSE WHO ARE FORCED TO SAVE ON FOOD IN UKRAINE, %



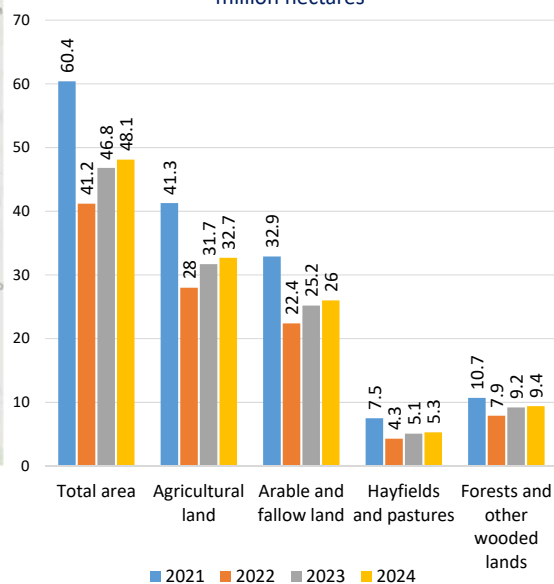
Source: Info Sapiens, Centre for Economic Strategy

Source: REACH/WFP, October 2023

## IMPLEMENTATION OF HUMANITARIAN DEMINING ACTIVITIES IN UKRAINE



Dynamics of the land resources in Ukraine in 2021-2024, million hectares



Source: Ukrainian Mine Action Portal, "Implementation of Humanitarian Demining Activities: Interactive Map" (as of August 12, 2024)

## HARVESTING OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE, thousand hectares as of August 15, 2024

Crops	2021		2022		2023		2024*			Change in planted area, %	
	Planted	Harvested	Planted	Harvested	Planted	Harvested	Planted	thousand hectares	%	2024 to 2021	2024 to 2023
<b>Grain and legumes total, including:</b>	<b>15,994.8</b>	<b>15,948.4</b>	<b>12,171.1</b>	<b>11,772.9</b>	<b>10,984.6</b>	<b>10,835.9</b>	<b>11,027.6</b>	<b>6,458.0</b>	<b>58.6%</b>	<b>-31.1%</b>	<b>+0.4%</b>
•wheat	7,095.2	7,090.2	5,435.3	5,281.5	4,664.8	4,658.4	4,860.6	4,846.1	99.7%	-31.5%	+4.2%
•barley	2,475.6	2,472.1	1,774.5	1,740.2	1,495.5	1,494.3	1,396.8	1,397.4	100%	-43.6%	-6.6%
•corn	5,522.4	5,481.8	4,325.3	4,124.5	4,112.7	3,975.2	4,026.4	-	-	-27.1%	-2.1%
•peas	242.8	240.2	131.3	125.7	150.3	150.0	210.1	207.6	98.8%	-13.5%	+39.8%
•buckwheat	89.5	91.9	121.3	121.0	147.6	147.9	87.8	1.6	1.8%	-1.9%	-40.5%
•millet	82.9	97.1	50.9	49.1	89.1	87.9	89.3	5.3	5.9%	+7.7%	+0.2%
Soybeans	1,310.8	1,322.9	1,558.9	1,527.2	1,842.1	1,834.0	2,635.0	0.7	0.0%	+101.0%	+43.0%
Rapeseed	1,005.8	1,004.5	1,185.7	1,156.2	1,435.6	1,431.6	1,254.4	1,227.6	97.9%	+24.7%	-12.6%
Sunflower	6,622.0	6,665.1	5,292.8	5,238.0	5,220.1	5,201.6	4,892.6	4.2	-	-26.1%	-6.3%

Note: data exclude the territories which are temporarily occupied by the Russian Federation and part of territories where the military actions are/were conducted.  
Note: includes data from territories under Ukrainian control as of the reporting date and can be updated

Source: based on data of the State Statistic Service of Ukraine

**HARVESTING OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE,**  
as of August 15, 2024

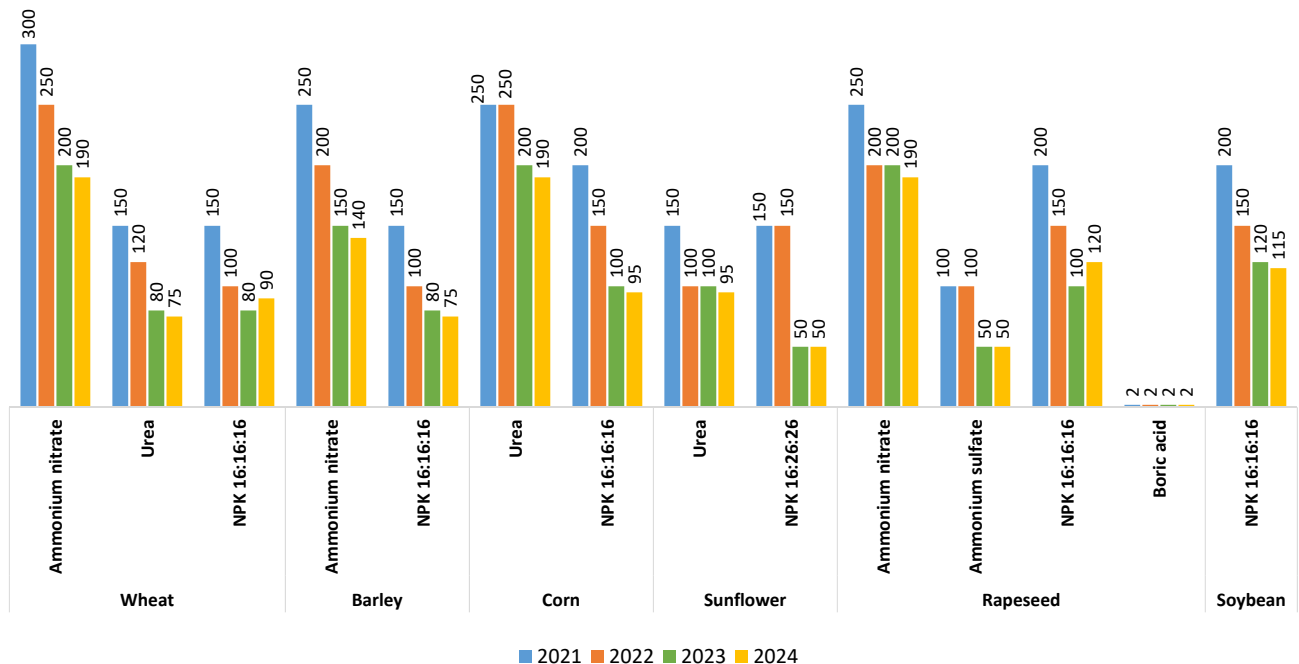
Crops	Average yields, metric tonnes per hectare				Change in yields per hectare, %	
	2021	2022	2023	2024*	2024* to 2022	2024* to 2023
<b>Grain and legumes total, including:</b>	<b>5.39</b>	<b>4.58</b>	<b>5.52</b>	<b>4.28</b>	<b>-6.6%</b>	<b>-22.5%</b>
•wheat	4.53	3.93	4.64	4.47	+13.7%	-3.7%
•barley	3.82	3.22	3.69	3.92	+21.7%	+6.2%
•corn	7.68	6.35	7.81	-	-	-
•peas	2.36	2.06	2.45	2.21	+7.3%	-9.8%
•buckwheat	1.15	1.22	1.42	1.44	+18.0%	+1.4%
•millet	2.35	1.84	2.31	1.79	-2.7%	-22.5%
Soybeans	2.64	2.26	2.59	1.52	-32.7%	-41.3%
Rapeseed	2.93	2.87	2.92	2.74	-4.5%	-6.2%
Sunflower	2.46	2.16	2.45	9.0*	-	-



Note: data exclude the territories which are temporarily occupied by the Russian Federation and part of territories where the military actions are/were conducted.  
Note: includes data from territories under Ukrainian control as of the reporting date and can be updated

Source: based on data of the State Statistic Service of Ukraine

**FERTILIZER APPLICATION IN UKRAINE, kg per hectare**



Source: Estimate based on UCAB data for central regions of Ukraine



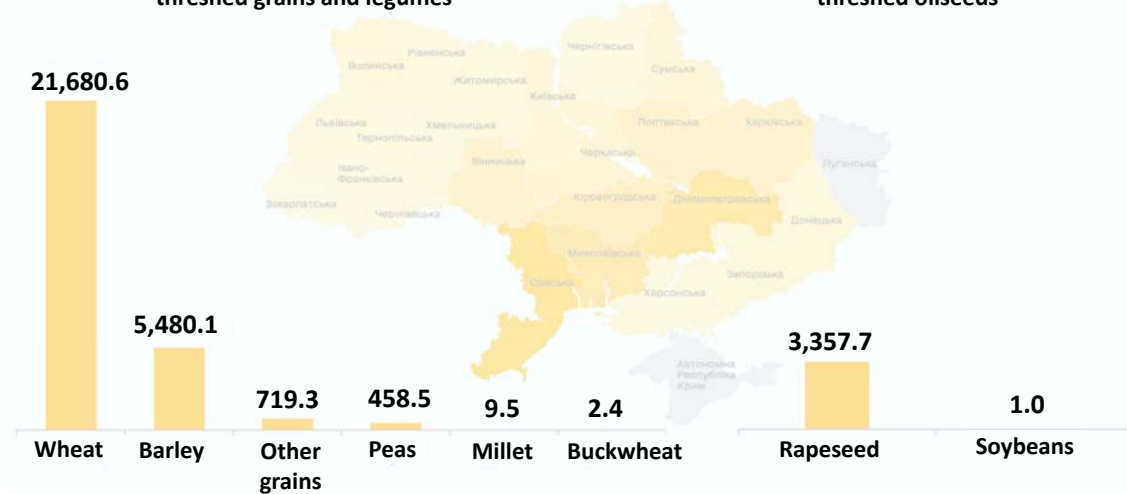
PROGRESS OF GRAIN, LEGUMES AND OIL CROPS HARVESTING IN UKRAINE IN 2024,  
as of August 14, 2024

**28,350 thousand tons**

threshed grains and legumes

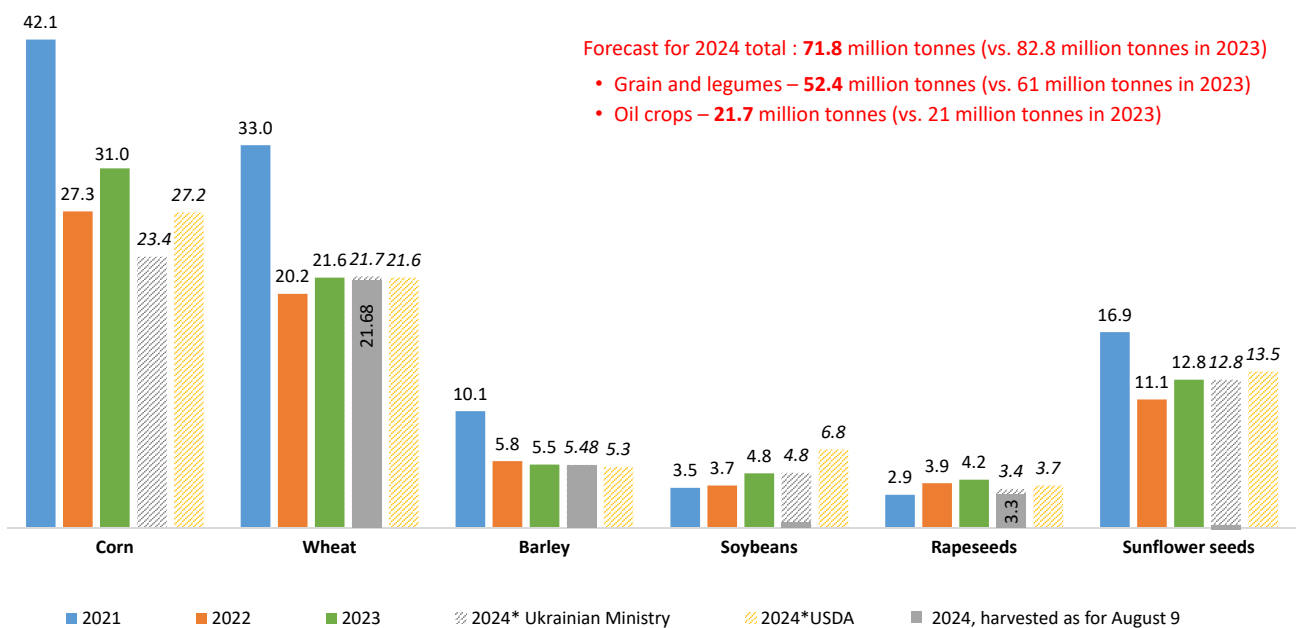
**3,363 thousand tons**

threshed oilseeds



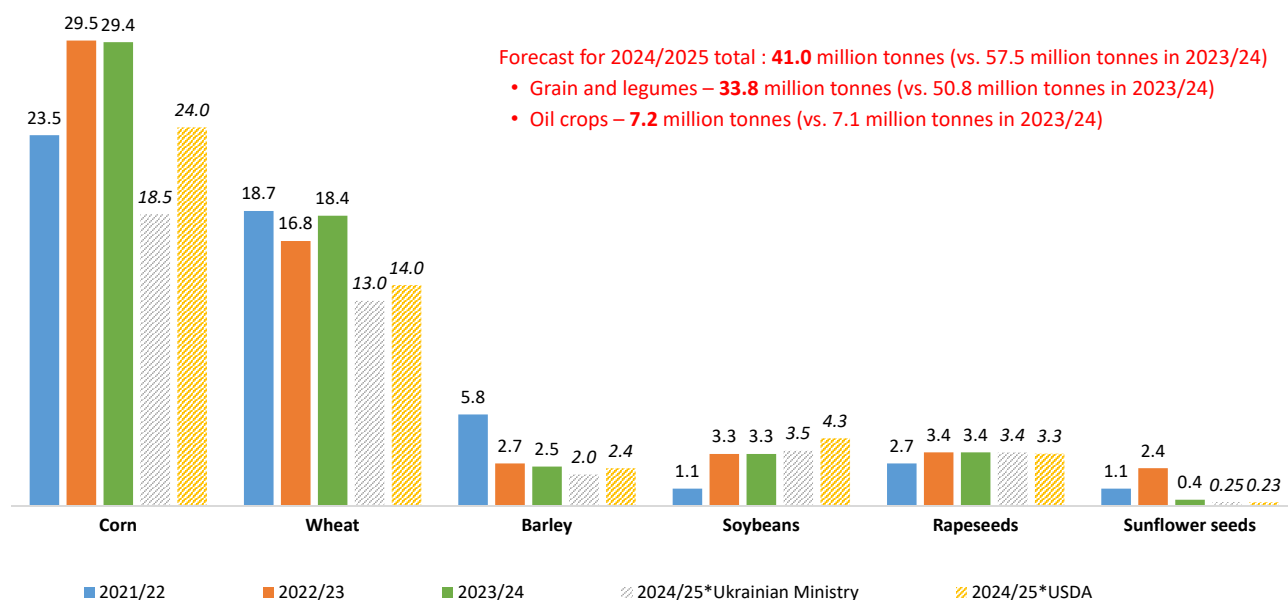
Source: Ministry of Agrarian Policy and Food of Ukraine

HARVEST OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE, million tonnes



Source: based on data of Ministry of Agrarian Policy and Food of Ukraine, Ukrainian Grain Association and USDA, as of August 12, 2

## EXPORT OF GRAIN, LEGUMES AND OIL CROPS FROM UKRAINE, million tonnes



Source: based on data of Ministry of Agrarian Policy and Food of Ukraine, Ukrainian Grain Association and USDA, as of August 12,

## EXPORT OF GRAIN, LEGUMES AND OILSEEDS FROM UKRAINE with products of their processing, thousand metric tonnes

	2020/21 MY Total	2021/22 MY Total	2022/23 MY Total	2023/24 MY		*2024/25 MY
				Total	incl. July, 2023	Total, incl. July, 2024
<b>Grain and legumes, total</b>	<b>43,939</b>	<b>48,508</b>	<b>49,236</b>	<b>50,826</b>	<b>2,160</b>	<b>3,440</b>
• wheat	16,413	18,741	16,894	18,402	758	1,438
• barley	4,210	5,752	2,712	2,491	285	477
• rye	15.8	161.9	18.0	1.6	0.5	0.3
• corn	22,596	23,535	29,228	29,389	1,112	1,511
Wheat flour	123.7	69.4	147.7	92.8	9.4	4.3
Other flour	1.1	1.5	6.2	5.4	0.3	0.4
<i>Total flour</i>	<i>124.8</i>	<i>70.9</i>	<i>153.9</i>	<i>98.6</i>	<i>9.7</i>	<i>4.7</i>
<b>Total grain &amp; flour export</b>	<b>44,105</b>	<b>48,579</b>	<b>49,390</b>	<b>50,925</b>	<b>2,170</b>	<b>3,445</b>
Sunflower seeds	192	1,652	1,864	312*	9.5*	3.6*
Sunflower oil	5,277	4,494	5,647	6,021*	505.1*	439*
Soybeans	1,468	1,396	3,109	3,093*	77.4*	227*
Rapeseeds	2,397	2,713	3,605	3,023*	241.8*	278*

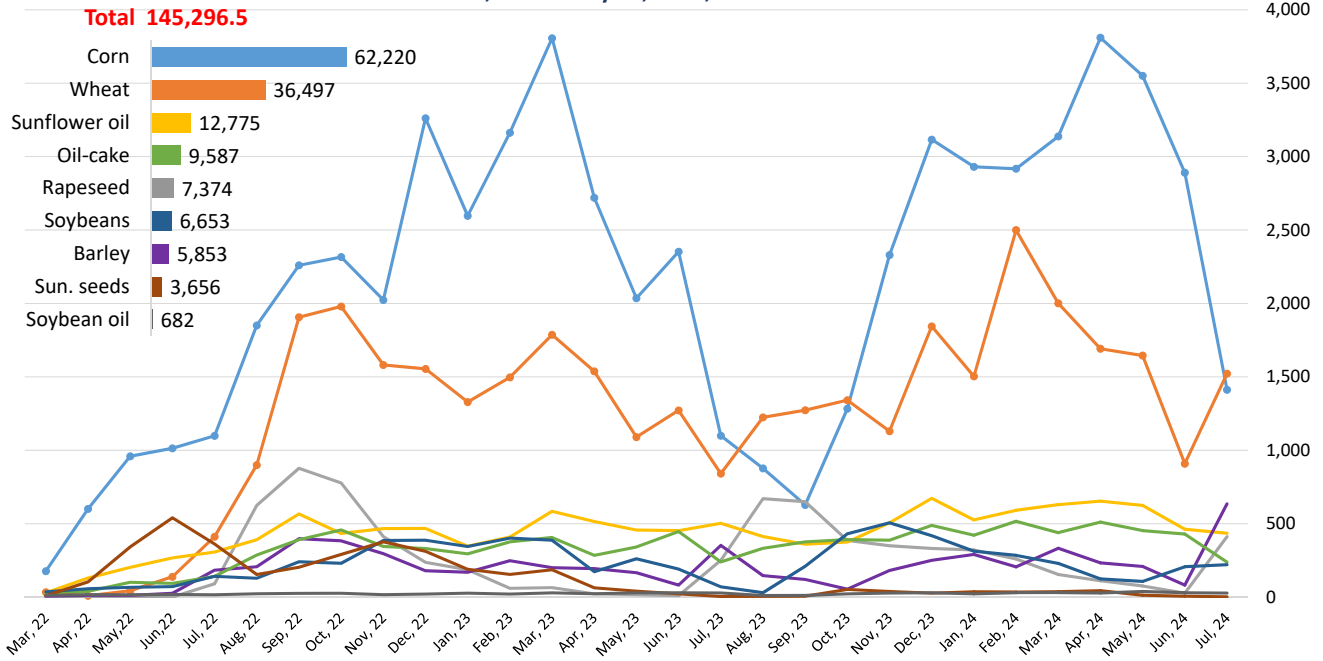
Note: MY (marketing year):

- for grains – July-June,

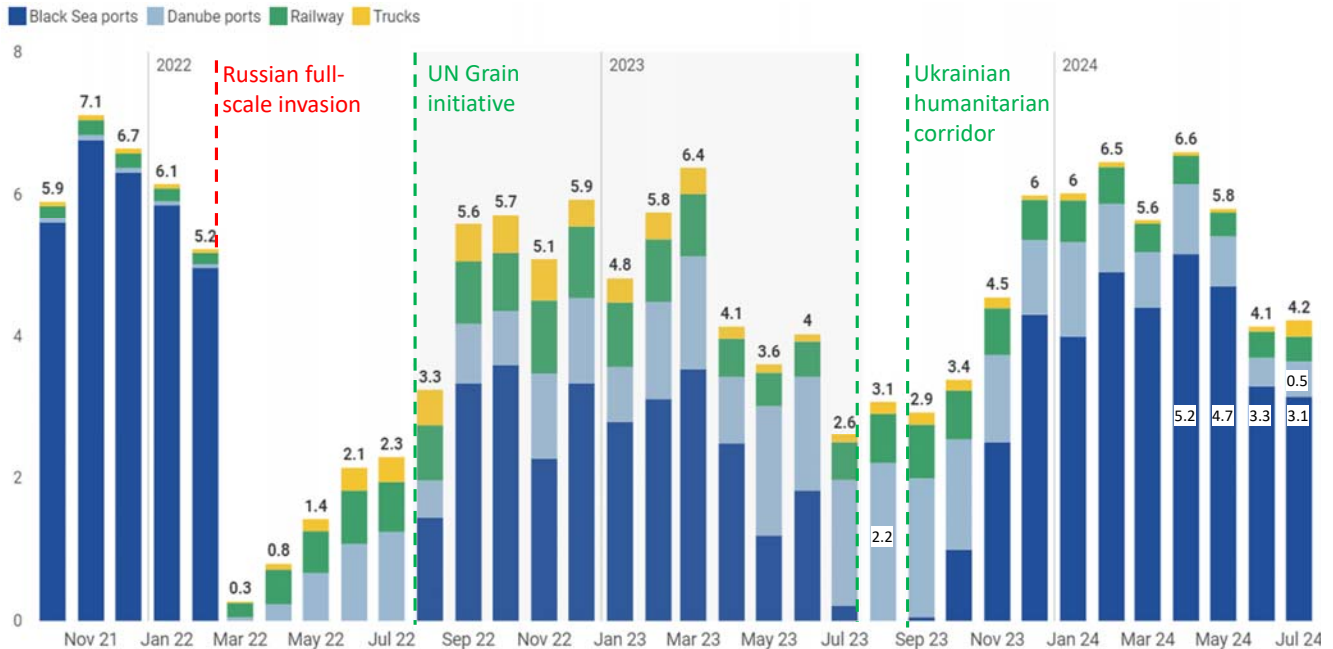
- for oilseeds – September-August (\*2023/24 MY available data September-July)

Source: based on data of State Customs Service of Ukraine and Ministry of Agrarian Policy and Food of Ukraine

**EXPORT SHIPMENTS FROM UKRAINE DURING THE WAR TIME BY TYPES OF AGRICULTURAL COMMODITIES, March 1, 2022 – July 31, 2024, thousand metric tonnes**

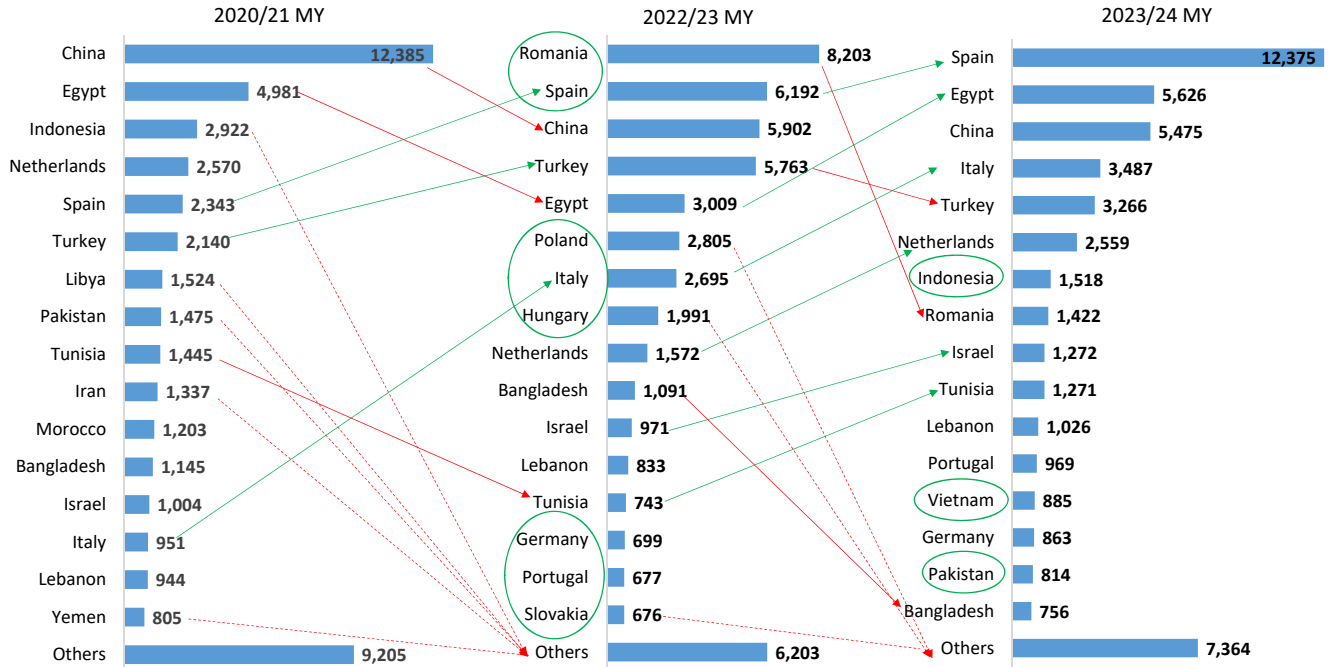


**GRAIN AND OILSEEDS EXPORT SHIPMENTS FROM UKRAINE IN TRANSPORTATION BREAKDOWN, million metric tonnes**



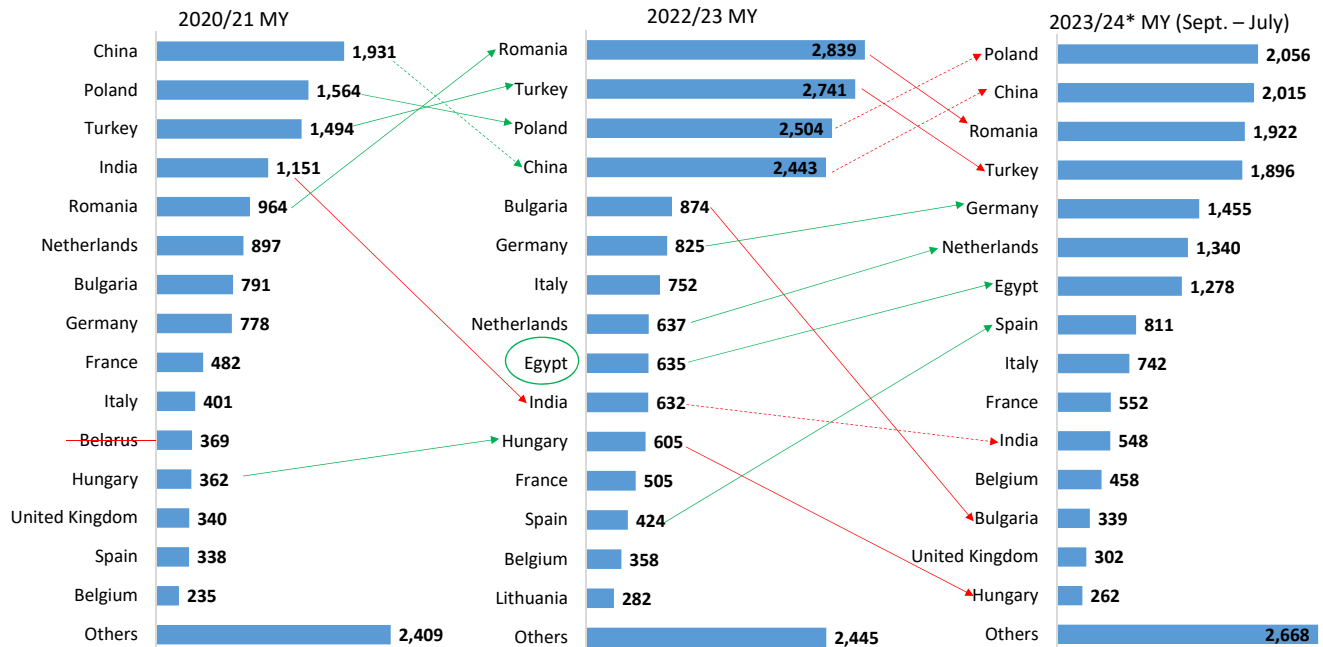
Source: Ministry of Agrarian Policy and Food of Ukraine and Ministry of Infrastructure of Ukraine, Center for Economic Strategy

### GEOGRAPHY OF GRAIN EXPORT FROM UKRAINE (July 1 – June 31), thousand metric tonnes



Source: based on data of the State Customs Service of Ukraine

### EXPORT GEOGRAPHY OF OILSEEDS AND BY-PRODUCTS FROM UKRAINE (September 1 – August 31), thousand metric tonnes



Note: sunflower, soybeans and rapeseeds and their by-products

Source: based on data of the State Customs Service of Ukraine

### BALANCE OF SUPPLY AND DEMAND OF GRAIN IN UKRAINE

\*forecast as of August 6, 2024

	2021/22	2022/23	2023/24	2024/25*	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2023/24 to 2022/23	2024/25* to 2023/24
Initial stocks	4,817	16,270	7,708	3,849	-52.6 %	-50.1 %
Sown area, thousand hectares	15,995	12,171	10,985	11,028	-9.7 %	+0.4 %
Harvested area, thousand hectares	15,948	11,773	10,836	10,790	-8.0 %	-0.4 %
Yield, tonnes / hectare	5.39	4.58	5.52	5.10	+20.5 %	-7.6 %
Gross harvest	86,010	53,864	59,772	55,039	+11.0 %	-7.9 %
Import	125	152	107	144	-30.1 %	+35.1 %
<b>Total supply</b>	<b>90,952</b>	<b>70,286</b>	<b>67,587</b>	<b>59,033</b>	<b>-3.8 %</b>	<b>-12.7 %</b>
Domestic consumption:	25,396	15,338	13,739	15,096	-10.4 %	+9.9 %
food	4,611	4,230	3,875	3,910	-8.4 %	+0.9 %
fodder	13,325	7,125	6,040	7,440	-15.2 %	+23.2 %
seeds	1,666	1,441	1,474	1,458	+2.3 %	-1.1 %
losses	4,812	1,777	1,588	1,377	-10.6 %	-13.3 %
other (alcohol, malt, starch, etc.)	982	765	762	911	-0.4 %	+19.6 %
Export	49,286	47,240	49,999	38,847	+5.8 %	-22.3 %
<b>Total distribution (demand)</b>	<b>74,682</b>	<b>62,578</b>	<b>63,738</b>	<b>53,943</b>	<b>+1.9 %</b>	<b>-15.4 %</b>
Ending stocks	16,270	7,708	3,849	5,090	-50.1 %	+32.2 %
Ratio of ending stocks to distribution	21 %	12 %	6 %	9 %		

Source: based on "APK-Inform", the State Statistic Service of Ukraine and the State Customs Service of Ukraine

### BALANCE OF SUPPLY AND DEMAND OF OILSEEDS IN UKRAINE (sunflower, soybeans and rapeseeds)

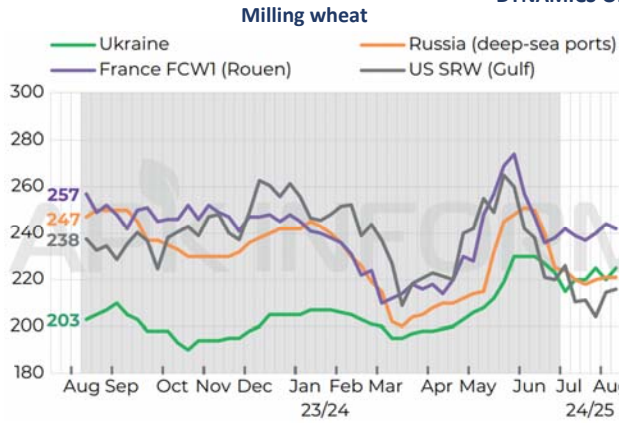
\*forecast as of August 6, 2024

	2022/23	2023/24*	2024/25**	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	2023/24* to 2022/23	2024/25** to 2023/24*
Initial stocks	4,695.9	711.3	166.4	-84.9 %	-76.6 %
Sown area, thousand hectares	8,561.5	9,488.0	9,920.0	+10.8 %	+4.6 %
Harvested area, thousand hectares	8,236.0	9,399.6	9,744.9	+14.1 %	+3.7 %
Yield, tonnes / hectare	2.50	2.70	2.50	+7.6 %	-7.2 %
Gross harvest	20,628.2	25,337.1	24,382.4	+22.8 %	-3.8 %
Import	72.6	34.8	41.7	-52.1 %	+19.9 %
<b>Total supply</b>	<b>25,396.7</b>	<b>26,083.1</b>	<b>24,590.4</b>	<b>+2.7 %</b>	<b>-5.7 %</b>
Domestic consumption:	16,278.4	18,638.2	17,302.8	+14.5 %	-7.2 %
processing for oil	15,792.5	18,100.3	16,790.0	+14.6 %	-7.2 %
seeds	240.8	291.4	267.0	+21.0 %	-8.4 %
other	53.0	52.0	60.7	-1.8 %	+16.7 %
losses	192.1	194.4	185.1	+1.2 %	-4.8 %
Export	8,407.0	7,278.6	7,020.0	-13.4 %	-3.6 %
<b>Total distribution (demand)</b>	<b>24,685.5</b>	<b>25,916.8</b>	<b>24,322.8</b>	<b>+5.0 %</b>	<b>-6.2 %</b>
Ending stocks	711.3	166.4	267.6	-76.6 %	+60.9 %
Ratio of ending stocks to distribution	2.9%	0.6%	1.1%		

Note: MY September-August

Source: based on "APK-Inform", the State Statistic Service of Ukraine and the State Customs Service of Ukraine

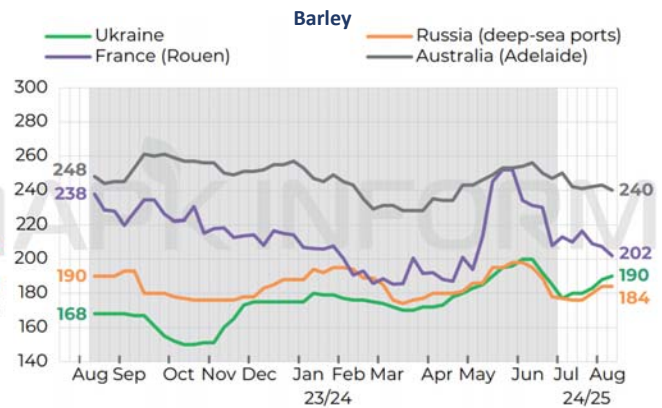
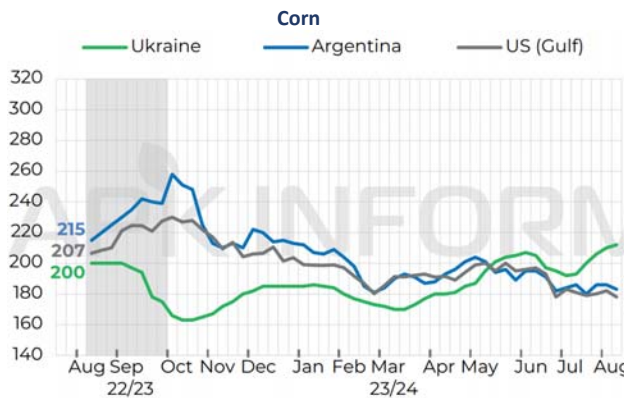
### DYNAMICS OF GRAIN PRICES, USD/t



	Stock / month	Country of origin	Terms of delivery	Aug 9	Aug 2	Jul 26	Jul 19	Jul 12	Last weekly change	
									USD/t	%
<b>Futures market</b>										
Wheat	CBOT, Sep	USA	EXW	199.3	198.1	192.3	199.4	197.7	+1.2	+0.6%
Milling wheat	Euronext, Sep	France	CPT Rouen	237.0	237.4	235.7	244.4	238.8	-0.4	-0.2%
Wheat	LIFFE, Nov	EU	EXW	244.9	243.3	247.9	252.9	251.4	+1.6	+0.7%
Wheat	BCA, Dec	Argentina	EXW	219.7	218.5	213.5	255.4	256.5	+1.2	+0.5%
<b>Cash market</b>										
Wheat SRW	Sep	USA	CPT Gulf of Mex.	215.9	214.6	204.1	211.2	210.5	+1.3	+0.6%
Wheat hard	Aug	Argentina	FOB	271.0	271.0	274.0	271.0	272.0	0	0%
Milling wheat	Sep	France	FOB	242.0	244.0	240.0	237.0	239.0	-2.0	-0.8%

Source: APK-inform

### DYNAMICS OF GRAIN PRICES, USD/t



	Stock / month	Country of origin	Terms of delivery	Aug 9	Aug 2	Jul 26	Jul 19	Jul 12	Last weekly change	
									USD/t	%
<b>Futures market</b>										
Corn yellow	CBOT, Sep	USA	EXW	148.3	152.1	155.3	153.7	157.5	-3.8	-2.5%
Corn	Euronext,	France	FOB	222.6	219.3	238.6	240.3	235.3	+3.3	+1.5%
Corn hard	BCA, Sep	Argentina	EXW	175.0	175.5	175.0	173.0	175.0	-0.5	-0.3%
<b>Cash market</b>										
Corn yellow	Sep	USA	CPT Gulf of Mex.	178.2	182.1	180.1	178.5	180.7	-3.9	-2.1%
Corn	Aug	France	FOB	229.4	234.9	245.1	236.0	240.3	-5.5	-2.4%
Corn	Aug	Argentina	FOB	183.0	186.0	186.0	180.0	186.0	-3.0	-1.6%
Fodder barley	Aug	France	FOB	202.1	207.4	208.8	216.5	210.1	-5.3	-2.6%

Source: APK-inform

PRICES DYNAMICS OF OILSEEDS AND BY-PRODUCTS (offer, FOB), USD/t

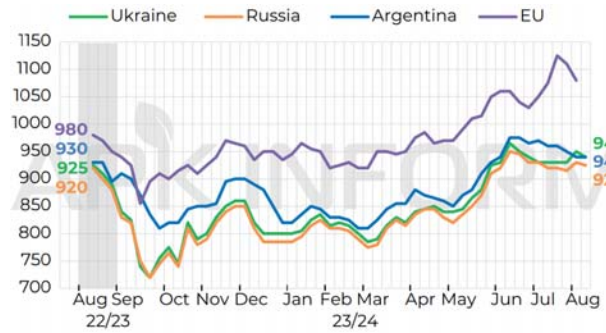
Export prices for oil crops and by-products in Ukraine, USD/t

	min	weekly change	max	weekly change	average	weekly change
<b>Offer, FOB, USD/t (Aug-Sep)</b>						
Crude SFO	925	-5	945	-15	940	-10
<b>Bid, FOB, USD/t (Aug-Sep)</b>						
Crude SFO	920		930	-10	925	-5
<b>Bid, CPT, USD/t</b>						
Crude SFO	915		925		920	
Sunflower meal	195		205		200	
Soyabeans	390	-10	420	-10	410	-5
Rapeseed	455	-15	485	-10	475	-10
Sunflower seed	395		410		400	
Crude SFO	910		925		920	
Sunflower meal	205		215		210	
<b>Bid, DAP-border, USD/t</b>						
Crude SFO	900		920		915	
Sunflower meal	200		210		205	
Soyabeans	410		430		415	-5
Rapeseed	450	-10	480	-10	470	-5

Export prices for oil crops and by-products in Russia, USD/t

	min	weekly change	max	weekly change	average	weekly change
<b>Offer, FOB, USD/t (Aug-Sep)</b>						
Crude SFO	905	-10	930	-10	925	-5
Sunflower meal	225		245		235	
<b>Bid, FOB, USD/t (Aug-Sep)</b>						
Crude SFO	880	-5	900	-5	890	-5
Sunflower meal	207		220		210	

Sunflower oil

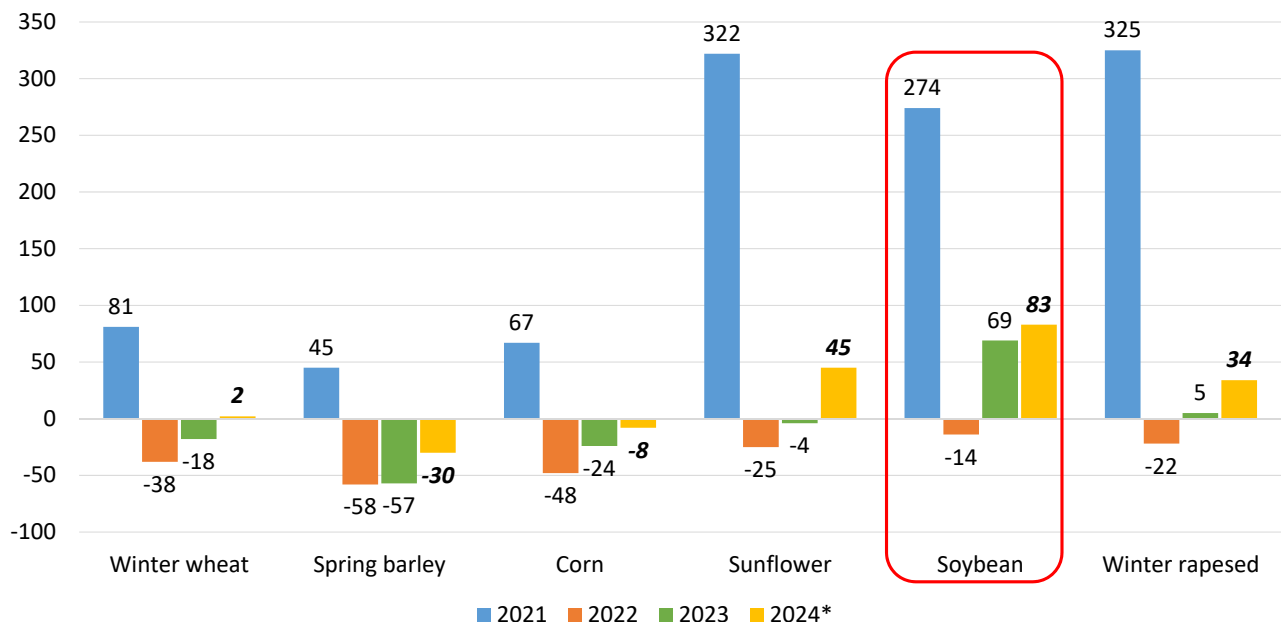


Soybeans



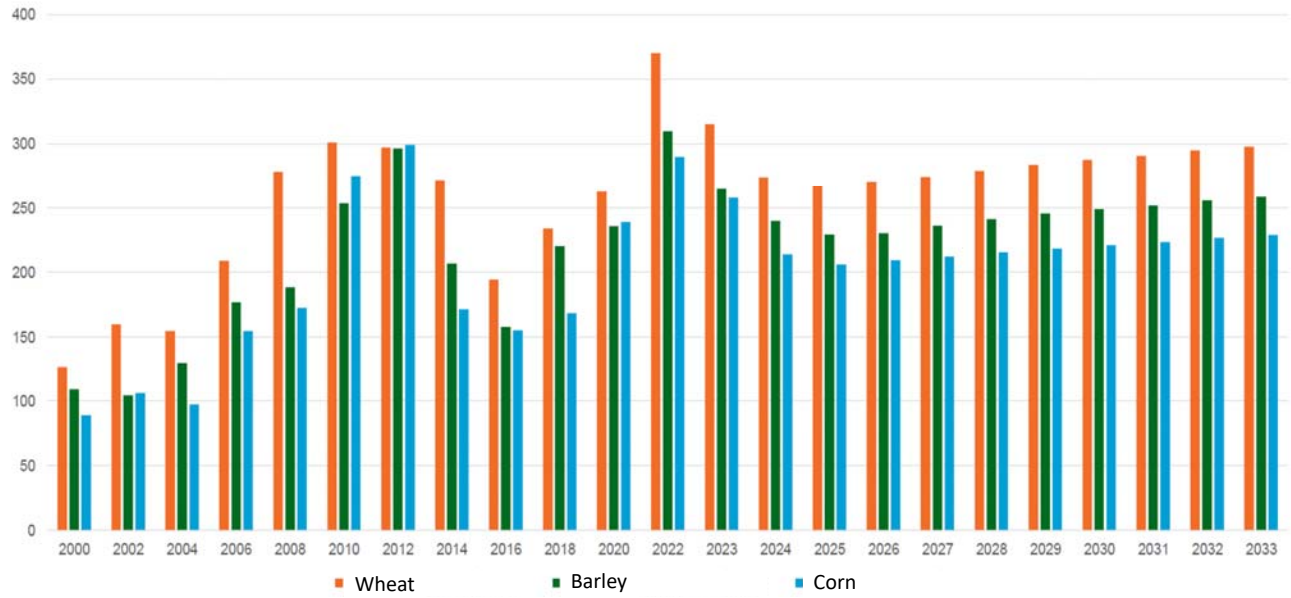
Source: APK-inform

AVERAGE PROFITABILITY OF GRAIN AND OILSEED PRODUCTION IN UKRAINE, US\$ per metric ton



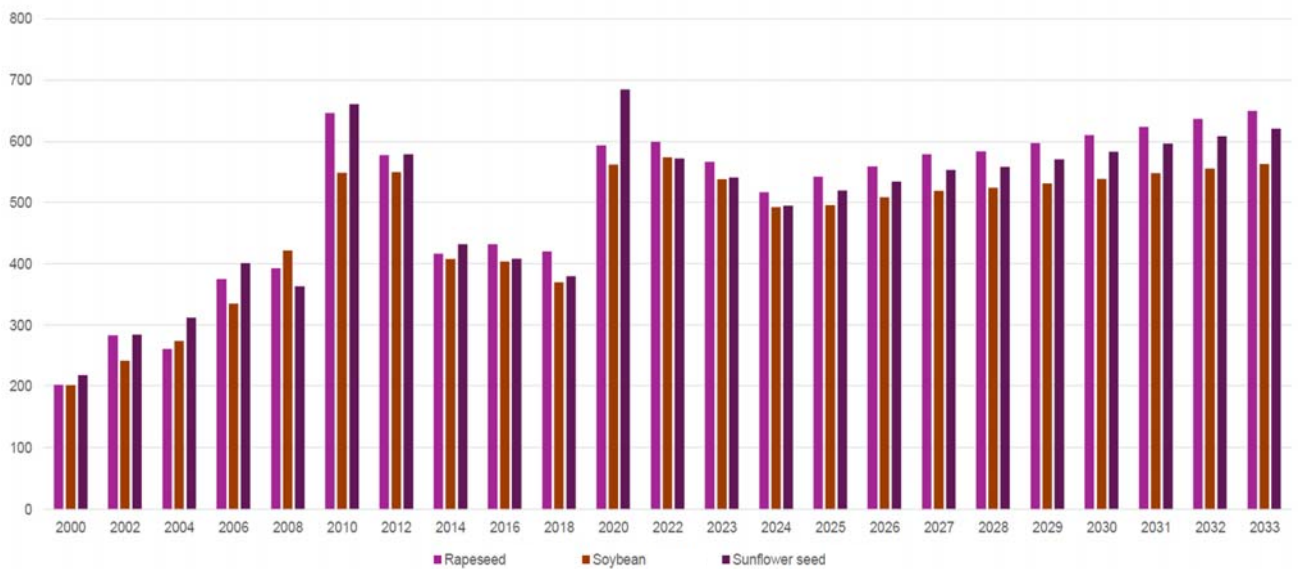
Source: Estimate based on UCAB data for central regions of Ukraine

### DYNAMIC OF WORLD CEREAL PRICES, USD / tonne



Source: OECD-FAO Agricultural Outlook 2024-2033

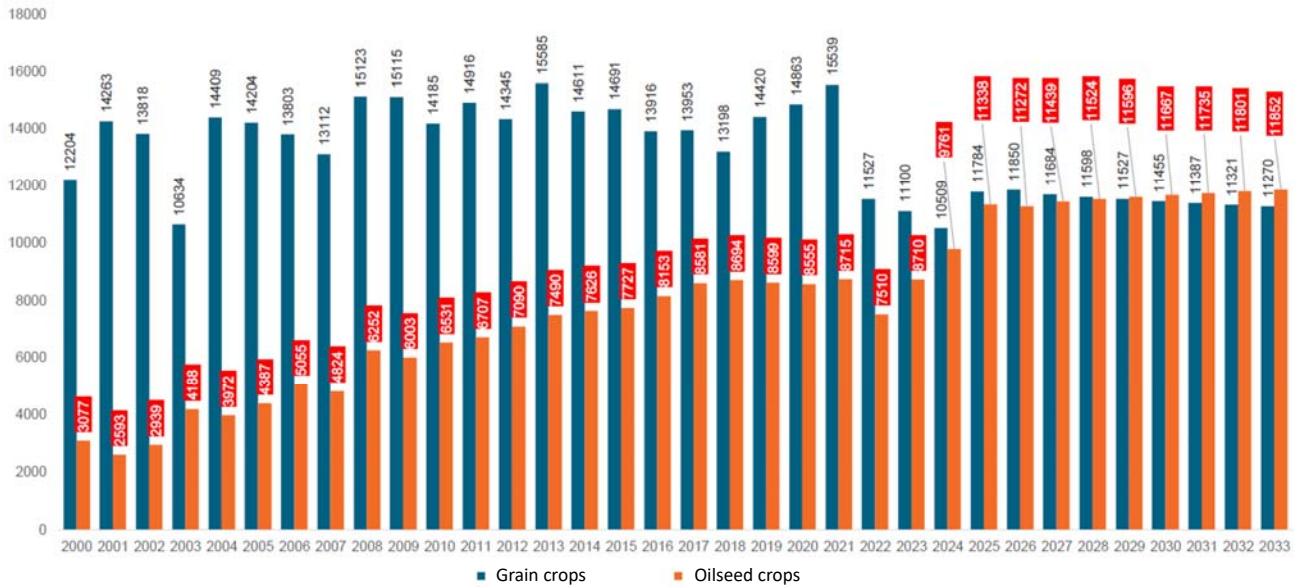
### DYNAMIC OF WORLD OILSEED PRICES, USD / tonne



Source: OECD-FAO Agricultural Outlook 2024-2033

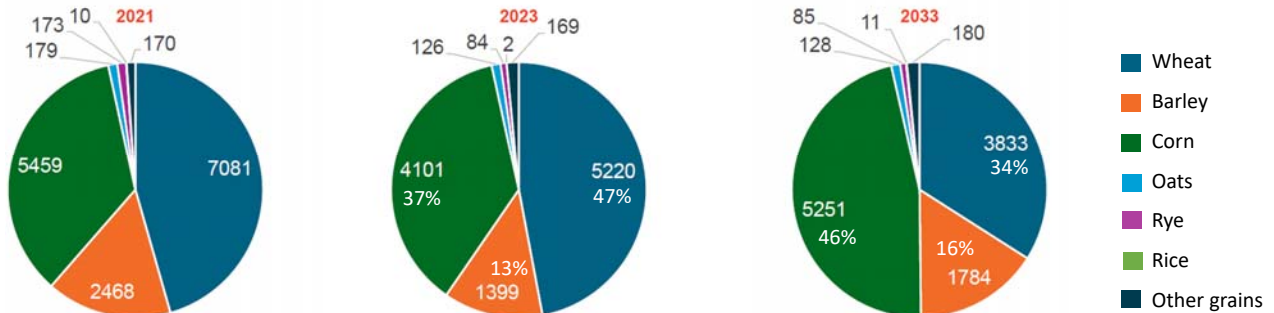


### OBSERVED AND PROJECTED AREAS HARVESTED OF GRAINS AND OILSEEDS IN UKRAINE, thousand hectares

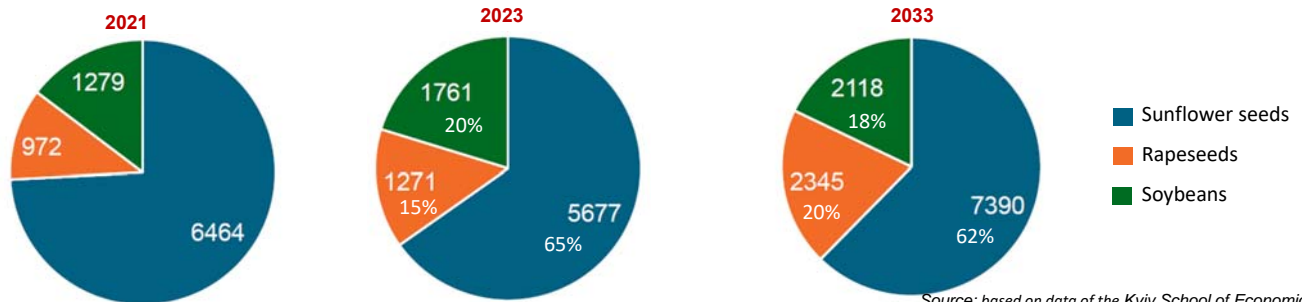


Source: based on data of the Kyiv School of Economics

### SHARES OF CROPS IN THE TOTAL CEREALS HARVESTED AREA, thousand hectares

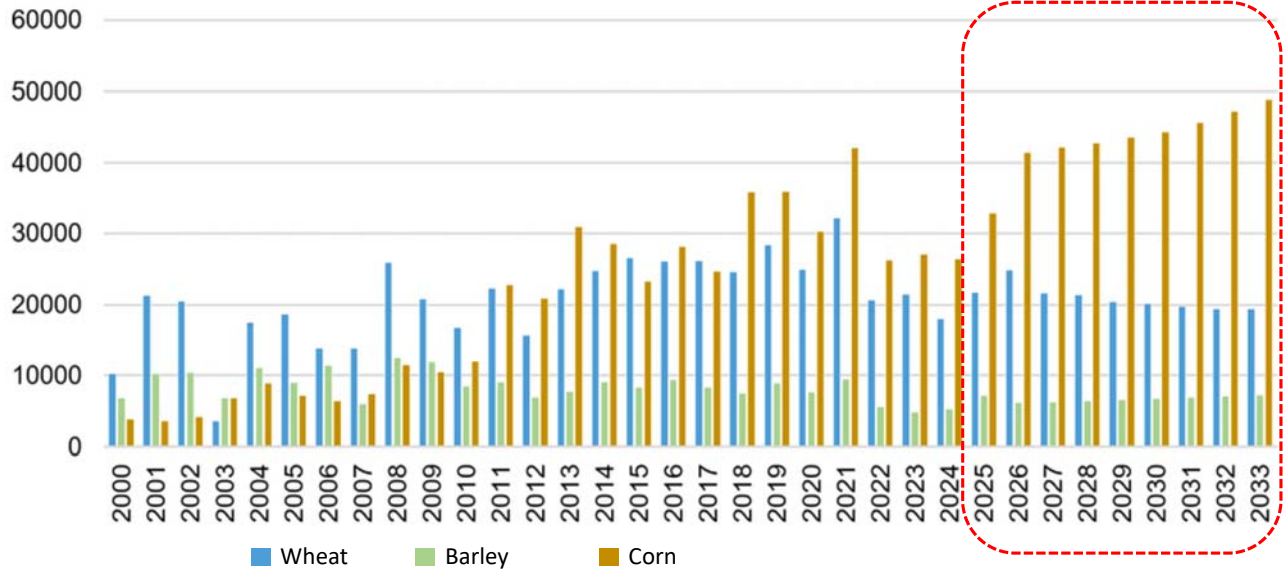


### SHARES OF CROPS IN THE TOTAL OILSEEDS HARVESTED AREA, thousand hectares



Source: based on data of the Kyiv School of Economics

**PROJECTED CHANGES IN PRODUCTION OF THE MAIN CEREALS IN UKRAINE, thous. tonnes**

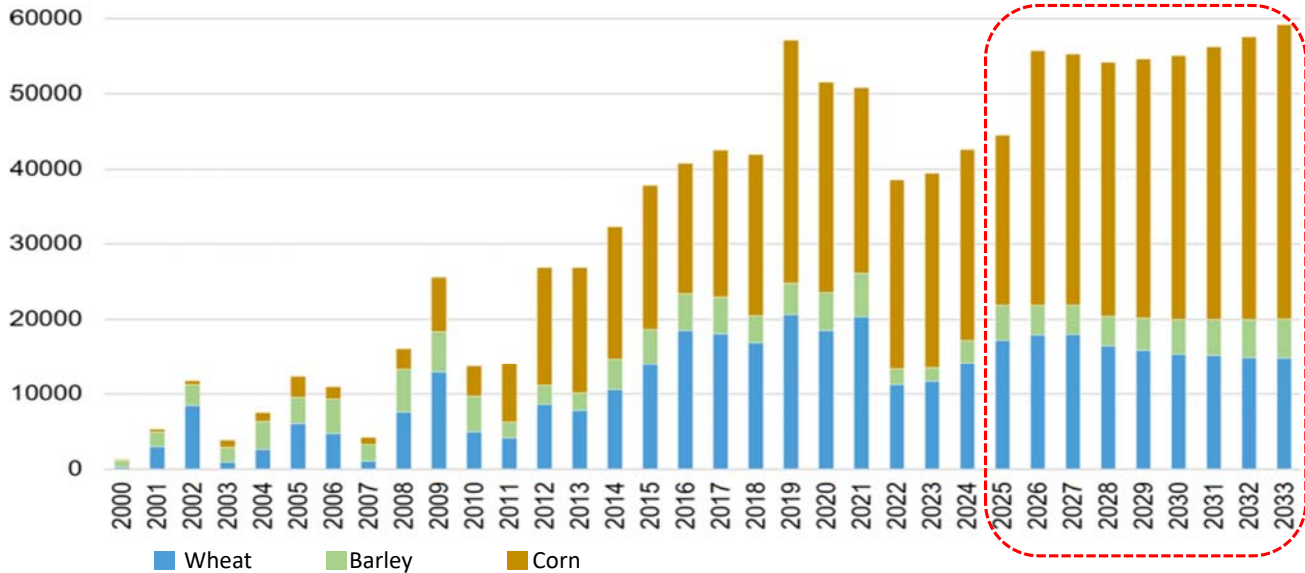


By 2033, total cereals production in Ukraine is projected to increase by **41.6% (to 76.4 million tonnes)** compared to the 2023 level:

- corn from 27 million tonnes in 2023 to **48.9 million tonnes** in 2033;
- barley from 4.8 to **7.3 million tonnes**;
- wheat decrease from 21.5 to **19.4 million tonnes**

Source: based on data of the Kyiv School of Economics

**EXPORT QUANTITIES AND EXPORT STRUCTURE OF MAIN GRAINS FROM UKRAINE IN 2000-2033, thsd. tonnes**

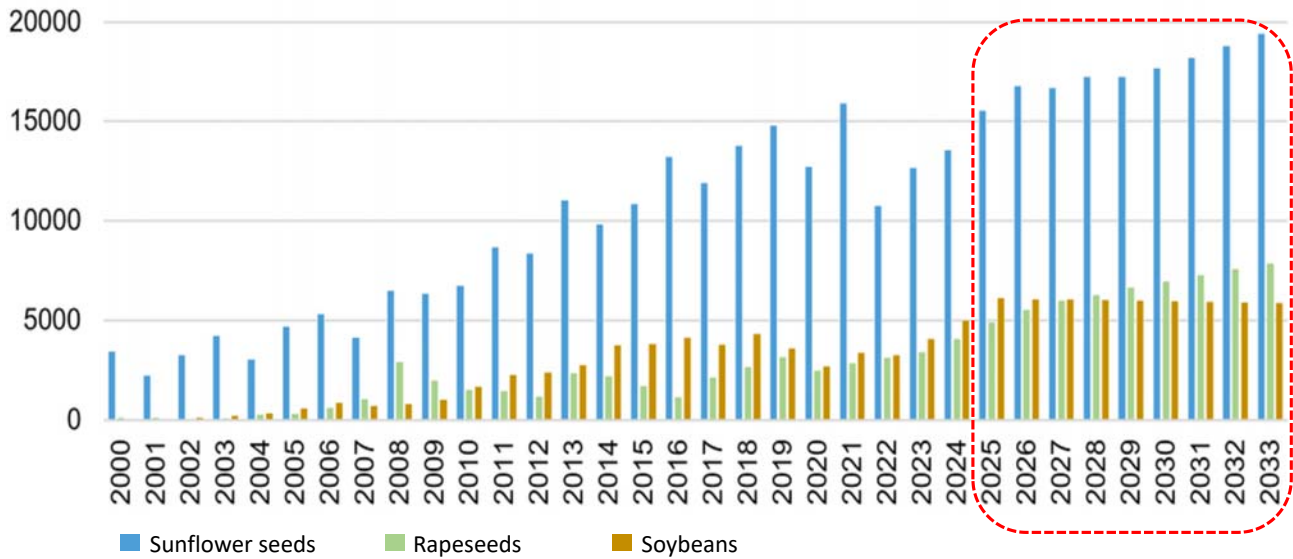


Export of cereals will grow from 44.4 million tonnes in 2023 to **59.4 million tonnes in 2033**.

- corn from 26 million tonnes in 2023 to **39 million tonnes** in 2033;
- barley from 1.8 to **5.3 million tonnes**;
- wheat to **14.8 million tonnes**

Source: based on data of the Kyiv School of Economics

**PROJECTED CHANGES IN PRODUCTION OF THE MAIN OILSEED CROPS IN UKRAINE, thousand tonnes**

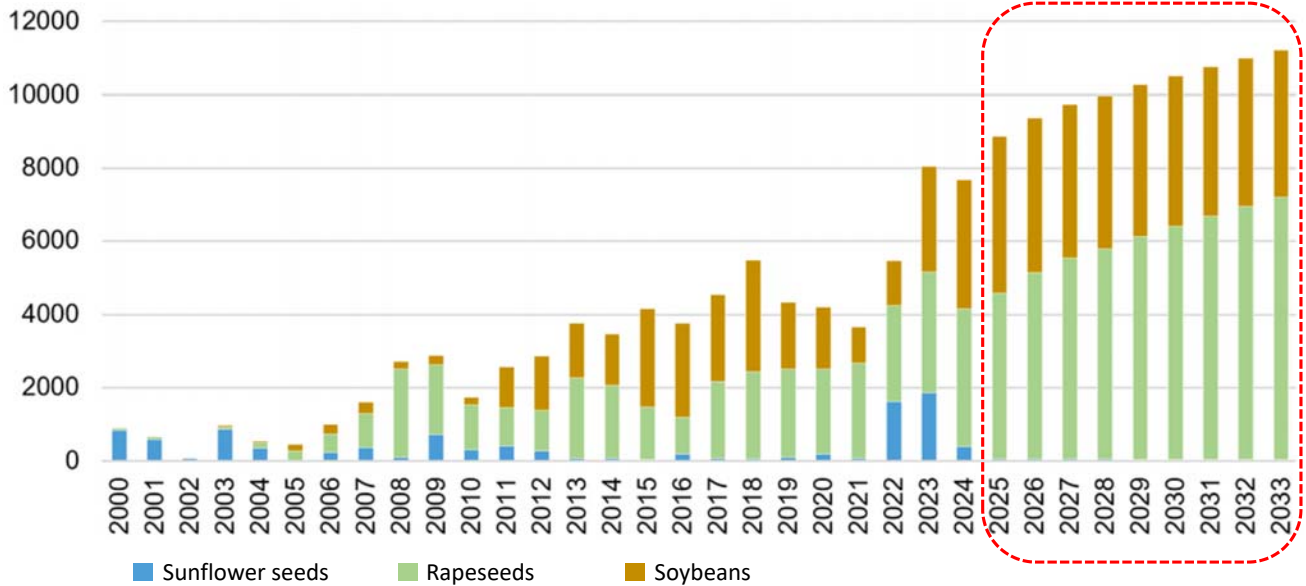


Oilseeds production is projected to increase from 20.2 in 2023 to **33.2 million tonnes in 2033**:

- sunflower seeds from 12.7 to **19.4 million tonnes**,
- rapeseeds from 3.4 to **7.9 million tonnes**,
- soybeans from 4.1 to **5.9 million tonnes**.

Source: based on data of the Kyiv School of Economics

**EXPORT QUANTITIES AND EXPORT STRUCTURE OF MAIN OILSEEDS FROM UKRAINE IN 2000-2033, thsd tonnes**



Oilseeds export is projected to increase:

- sunflower seeds exported will return to the pre-war trend and remain **50 thousand tonnes**,
- rapeseeds from 3.3 to **7.2 million tonnes**,
- soybeans from 2.9 to **4 million tonnes**.

Source: based on data of the Kyiv School of Economics

## HARVESTING OF GRAIN, LEGUMES AND OIL CROPS IN RUSSIA

Commodity	2021			2022			2023			2024			
	Harvested, million hectares	Yield, tonnes per hectare	Produced, million tonnes	Harvested, million hectares	Yield, tonnes per hectare	Produced, million tonnes	Harvested, million hectares	Yield, tonnes per hectare	Produced, million tonnes	Planted area, million hectares	Production forecast, mln tonnes	Harvested, mln tonnes	Export forecast, 2024/25 mln tonnes
<b>Grains and legumes, total</b>	45.42	2.79	126.95	46.59	3.44	157.68	46.71	3.10	144.96	46.13	129.5	68.7	56.2
including:													
• Wheat	27.83	2.84	79.05	29.25	3.62	105.91	29.19	3.18	92.85	28.51	83.8	57.1	44.5
• Corn	2.89	5.58	16.12	2.45	6.09	14.71	2.40	6.93	16.63	2.62	14.3		4.0
• Barley	7.87	2.41	18.95	7.92	3.10	24.57	7.83	2.70	21.15	6.96	17.2	7.7	4.3
• Buckwheat	0.93	1.11	1.03	1.09	1.21	1.32	1.23	1.20	1.48	1.09	1.3		0.16
• Rice	0.19	6.35	1.19	0.17	5.60	0.97	0.19	5.79	1.07	0.21	1.1		0.02
Rapeseeds	1.64	1.82	2.99	2.25	2.10	4.71	2.07	2.03	4.20	2.73	4.6		0.75
Soybeans	2.97	1.66	4.94	3.31	1.90	6.30	3.55	1.92	6.83	4.29	7.2		1.70
Sunflower seeds	9.60	1.65	15.79	8.87	1.77	15.74	8.96	1.84	17.26	9.76	15.8		0.25

Source: based on data of Federal State Statistic Service of the Russian Federation

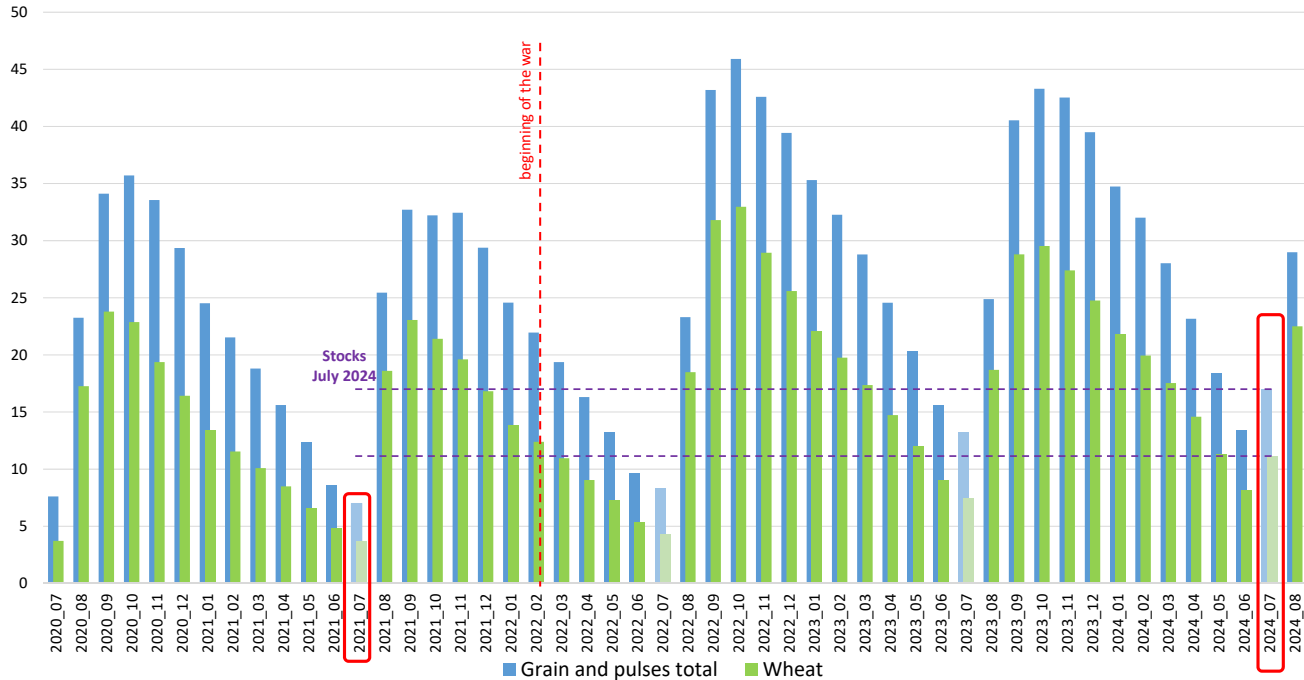
## BALANCE OF SUPPLY AND DEMAND OF GRAIN IN RUSSIA

(\*forecast as of August 15, 2024)

	2021/22	2022/23	2023/24	2024/25*	Deviation, %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2023/24 to 2022/23	2024/25* to 2023/24
Initial stocks	23,104	30,433	58,646	56,209	+92.7 %	-4.2 %
Sown area, thousand hectares	47,007	47,504	48,035	46,127	+1.1 %	-4.0 %
Harvested area, thousand hectares	47,504	46,880	46,710	43,330	-0.4 %	-7.2 %
Yield, tonnes / hectare	2.56	3.36	3.10	2.94	-7.7 %	-5.2 %
<b>Gross harvest</b>	121,399	157,614	144,962	127,413	-8.0 %	-12.1 %
Import	264	178	163	153	-8.5 %	-5.9 %
<b>Total supply</b>	<b>144,768</b>	<b>188,226</b>	<b>203,772</b>	<b>183,775</b>	<b>+8.3 %</b>	<b>-9.8 %</b>
<b>Domestic consumption:</b>	80,634	82,015	83,584	83,605	+1.9 %	+0.0 %
food	18,130	18,590	19,240	19,847	+3.5 %	+3.2 %
fodder	43,690	43,175	44,220	44,152	+2.4 %	-0.2 %
seeds	10,321	10,220	9,966	10,155	-2.5 %	+1.9 %
losses	3,695	4,790	5,004	4,409	+4.5 %	-11.9 %
other (alcohol, malt, starch, etc.)	4,798	5,240	5,154	5,042	-1.6 %	-2.2 %
Export	34,058	47,564	63,979	59,075	+34.5 %	-7.7 %
<b>Total distribution (demand)</b>	<b>114,695</b>	<b>129,579</b>	<b>147,563</b>	<b>142,680</b>	<b>+13.9 %</b>	<b>-3.3 %</b>
Ending stocks	30,433	58,646	56,209	41,095	-4.2 %	-26.9 %
Ratio of ending stocks to distribution	26%	45%	38%	29%		

Source: based on "APK-Inform", the Federal State Statistics Service of the Russian Federation

### DYNAMICS OF GRAIN STOCKS IN RUSSIA (ag enterprises), million tonnes



Source: based on data of Federal State Statistics Service of the Russian Federation

### BALANCE OF SUPPLY AND DEMAND OF OILSEEDS IN RUSSIA (sunflower, soybeans and rapeseeds)

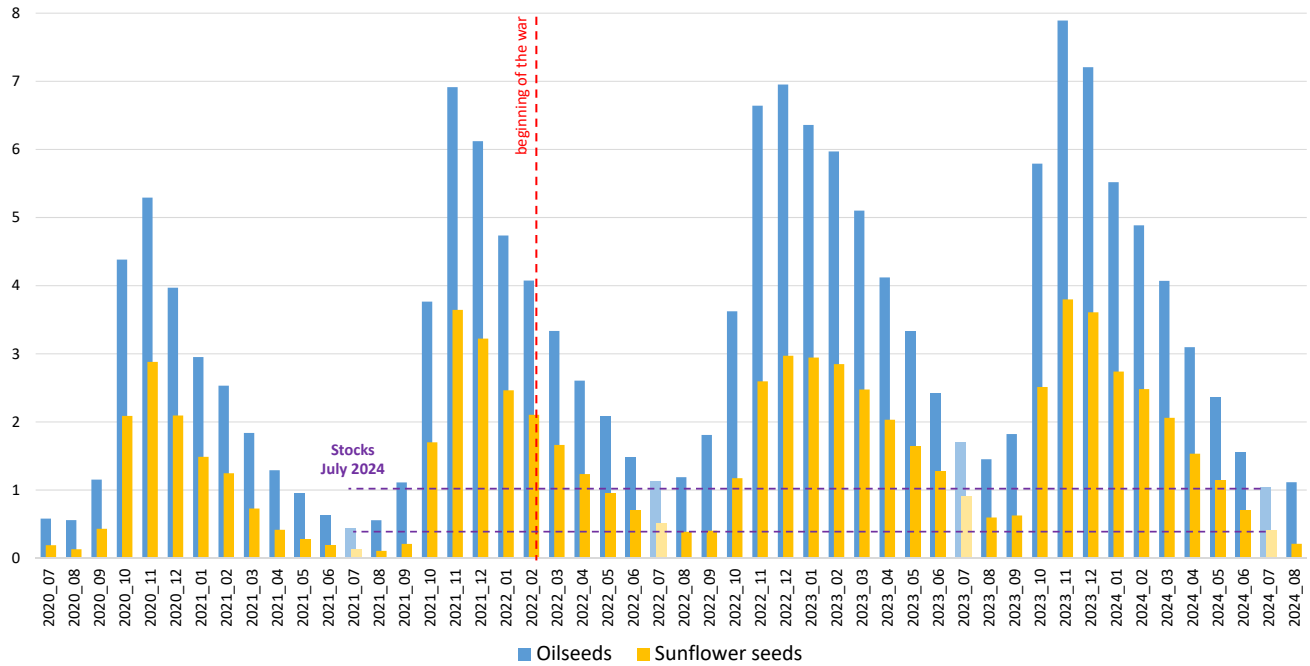
\*forecast as of August 13, 2024

	2022/23	2023/24*	2024/25**	Deviation, %	
	thousand tonnes	thousand tonnes	thousand tonnes	2023/24* to 2022/23	2024/25** to 2023/24*
Initial stocks	2,256.5	1,142.3	369.1	-49.4%	-67.7%
Sown area, thousand hectares	16,432.0	16,027.6	17,358.0	-2.5%	+8.3%
Harvested area, thousand hectares	15,453.0	15,464.2	16,587.7	+0.1%	+7.3%
Yield, tonnes / hectare	1.85	1.92	1.82	+3.7%	-4.8%
Gross harvest	28,537.5	29,618.3	30,235.2	+3.8%	+2.1%
Import	1,057.6	1,213.5	1,017.0	+14.7%	-16.2%
<b>Total supply</b>	<b>31,851.5</b>	<b>31,974.1</b>	<b>31,621.3</b>	<b>+0.4%</b>	<b>-1.1%</b>
Domestic consumption:	27,780.0	29,130.0	28,462.5	+4.9%	-2.3%
processing for oil	26,888.5	28,164.8	27,489.6	+4.7%	-2.4%
seeds	511.1	597.7	580.9	+16.9%	-2.8%
other	61.8	47.8	75.8	-22.7%	+58.5%
losses	318.6	319.7	316.2	+0.4%	-1.1%
Export	2,929.2	2,475.0	2,650.0	-15.5%	+7.1%
<b>Total distribution (demand)</b>	<b>30,709.2</b>	<b>31,605.0</b>	<b>31,112.5</b>	<b>+2.9%</b>	<b>-1.6%</b>
Ending stocks	1,142.3	369.1	508.8	-67.7%	+37.8%
Ratio of ending stocks to distribution	3.7%	1.2%	1.6%		

Note: MY September-August

Source: based on "APK-Inform", the Federal State Statistics Service of the Russian Federation

### DYNAMICS OF OILSEEDS STOCKS IN RUSSIA (ag enterprises), million tonnes



Source: based on data of Federal State Statistics Service of the Russian Federation

Thank you!

Questions?

*Dr. Antonina Broyaka*  
 Extension Associate of Agricultural Economics Department,  
 Kansas State University  
 broyaka@ksu.edu

**KANSAS STATE UNIVERSITY** Agricultural Economics