

Black Sea grain and oilseed production and trade: the latest developments and prospects

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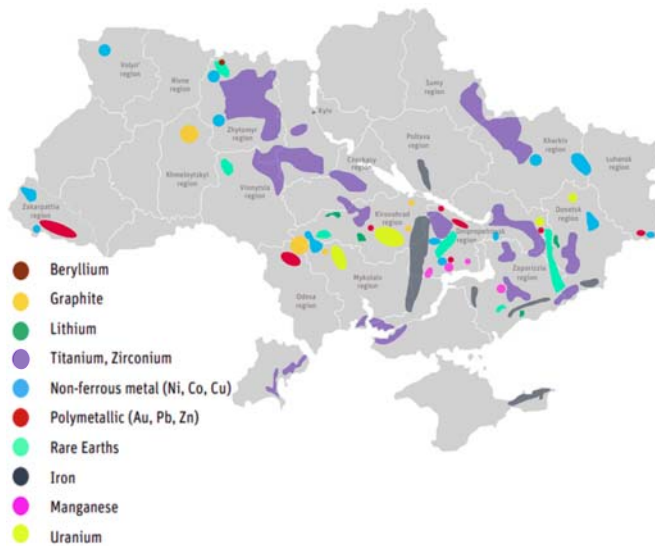
OUTLINE:

- Damages and losses from the war
- The results of 2024/25 grain and oilseed exports from Ukraine
- 2025/26 forecast of Ukraine's grain and oilseed production and exports
- Dynamics of grain and oilseed world prices
- Grain and oilseeds production and exports from Russia



UKRAINE'S NATURAL RECOURSES

Critical Raw Materials of Ukraine



Source: Ukrainian Geological Survey

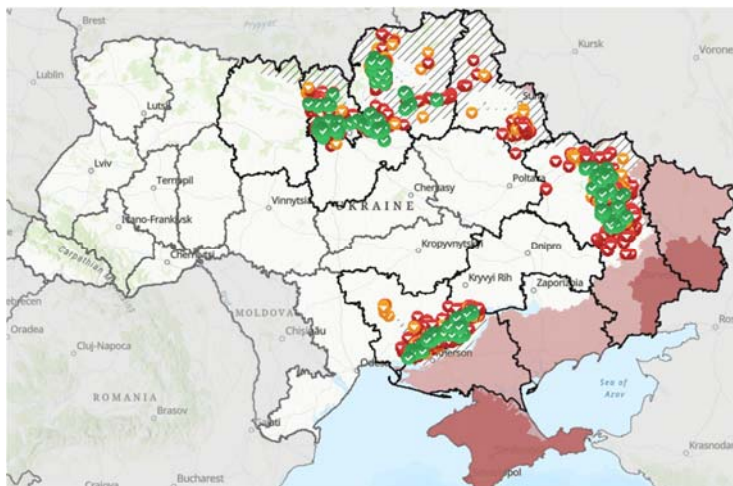
Total area 233,062 miles²
Arable land from total area 56.8%

Ukraine's Cropland, 2021



Source: WorldCereal

UKRAINE DEMINING



17.4 mln ha

Territory affected by hostilities

3.7 mln ha

Cleared through demining or non-technical survey
1.7 mln ha in 2024

6 mln ha

Potentially contaminated agricultural land

Cleared

2023 **274** thous. ha

2024 **318** thous. ha

2025 At least **40** thous. ha

Returned to cultivation

2023 208 thous. ha

2024 285 thous. ha

29,839.2 US\$ million

Total need for land clearance (2025-2035)

Reduced from 34.6 US\$ billion estimated in 2024

Territories affected by military invasion

- Deoccupied territories after February 24th, 2022
- The territories temporarily occupied by the Russian Federation before February 24th, 2022
- Territories temporarily occupied by the Russian Federation after February 24th, 2022

Land release



Oblasts with a focus on MA

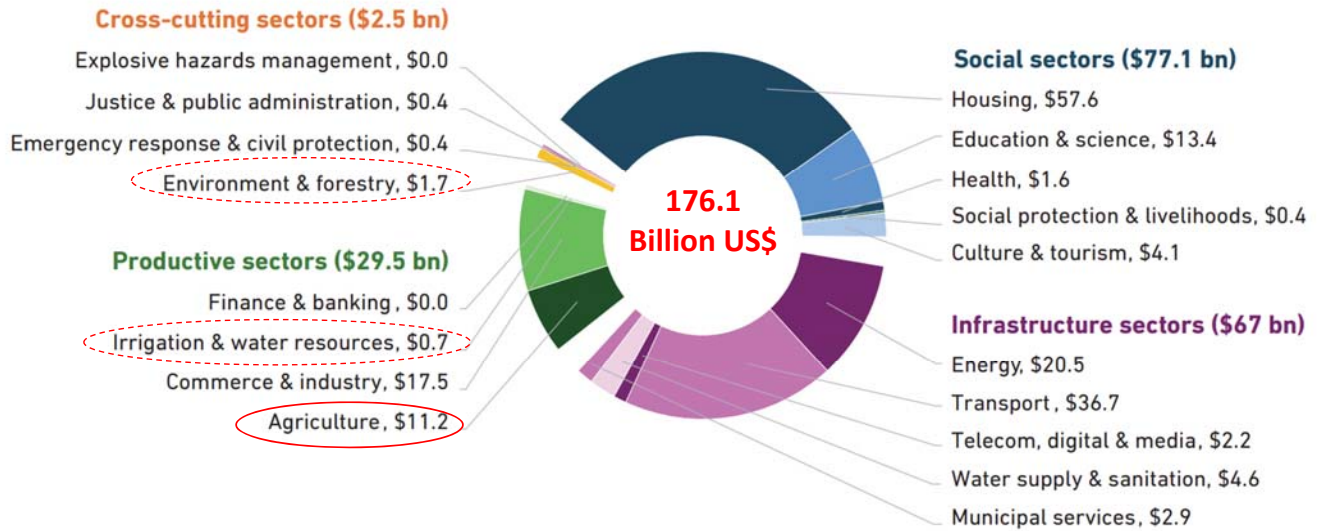


Type of hazard areas identified by NTS

- Confirmed Hazardous Area (CHA)
- Suspected Hazardous Area (SHA)

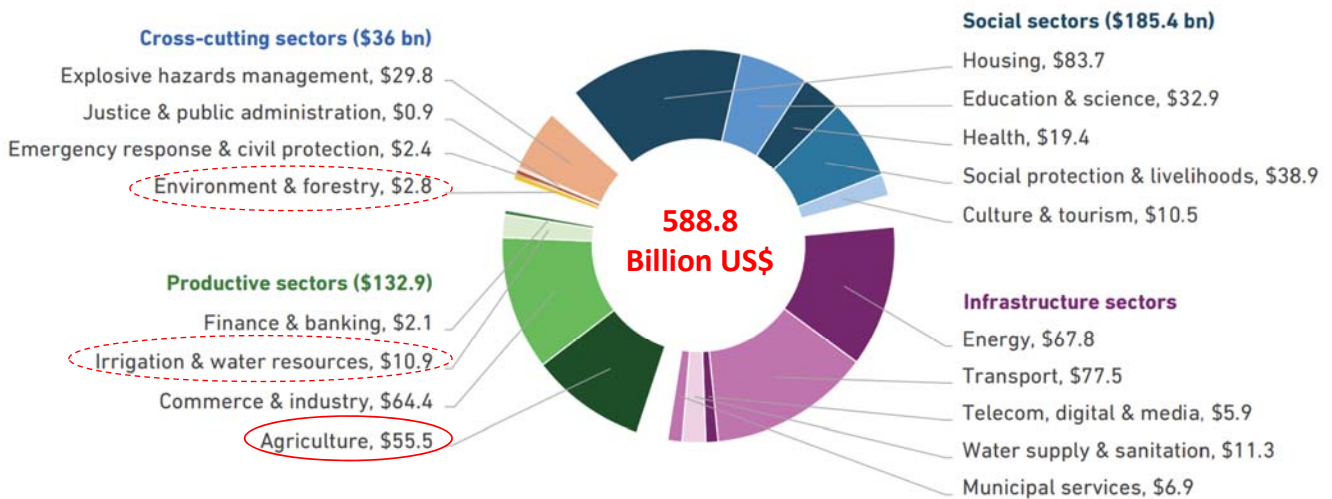
Sources: World Bank, Ministry of Economy of Ukraine, Ukrainian National Mine Action Center

TOTAL DIRECT DAMAGE TO THE UKRAINIAN ECONOMY
(February 24, 2022 – December 31, 2024)



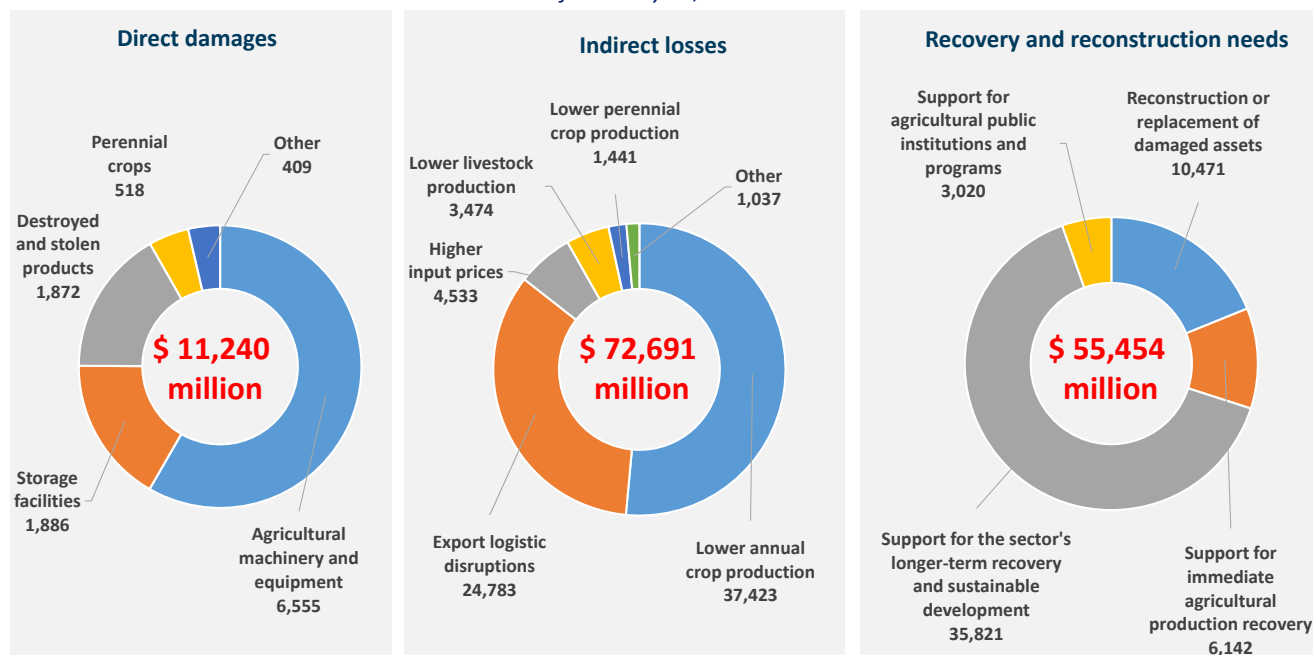
Source: World Bank, RDNA4

INDIRECT LOSSES OF THE UKRAINIAN ECONOMY
(February 24, 2022 – December 31, 2024 + 18 months ahead)



Source: World Bank, RDNA4

DAMAGES FROM THE WAR TO UKRAINIAN AGRICULTURE AND RECONSTRUCTION NEEDS (US\$ million)
as of February 24, 2025



Source: World Bank, RDNA4, Ministry of Agrarian Policy and Food of Ukraine

FRAMEWORK FOR AN AGRICULTURAL RECOVERY PLAN FOR UKRAINE

Stage	Priorities	Objective
Urgent (0–1 years)	Restore production, transportation, storage, and irrigation infrastructure	To restore core sector functions, demine agricultural land, and repair essential infrastructure
	Recultivate farmland and develop the land market	
	Secure financial assistance for farmers	
Short-term (1–3 years)	Develop export support and market diversification	To stabilize production, expand economic opportunities for farmers, and improve logistics routes
	Develop agricultural labor force and education	
Medium-term (3–5 years)	Strengthen rural communities and small-scale farmers	To lay the foundation for a sustainable, modernized, and competitive agriculture sector
	Develop the livestock industry	
Long-term (5+ years)	Integrate Ukraine's agriculture sector into the European Union	To strengthen Ukraine's integration into the global agricultural economy and attract long-term international partners
	Adapt the agriculture sector for climate change	
	Develop the food processing industry	

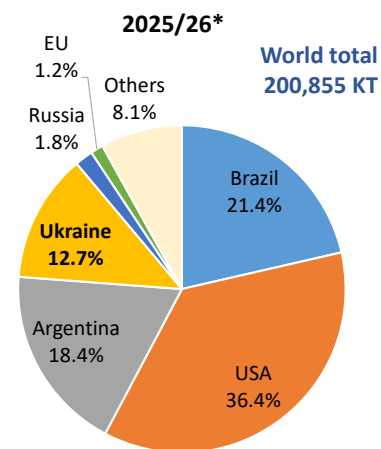
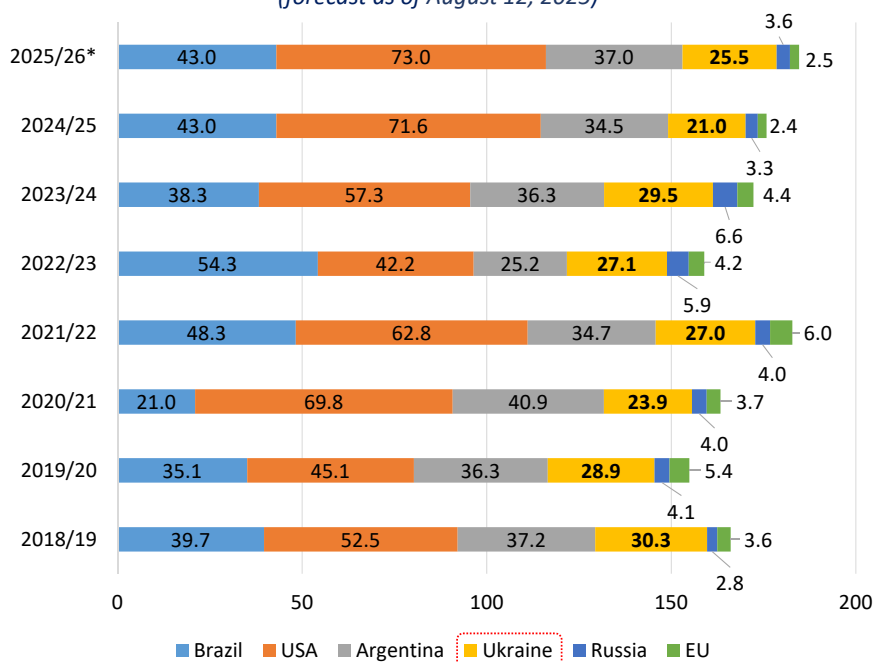
<https://www.csis.org/analysis/blueprint-agricultural-recovery-plan-ukraine>

ROLE OF UKRAINE IN WORLD AGRICULTURE 2024 (Rank in the world market)

	Export, mln \$	Production	Export
Sunflower oil	5,117	#2	#1
Corn	5,071	#7	#4
Wheat	3,735	#9	#6
Rapeseed	1,850	#7	#3
Soybeans	1,340	#9	#6
Sunflower meal	1,029	#2	#1
Poultry	960	#19	#6
Barley	557	#7	#5
White sugar	420	#18	#11
Soybean oil	316	#19	#8
Soybean meal	304	#19	#11
Rapeseed oil	239	#15	#7
Walnuts	185	#5	#4
Powdered milk, cream	74	#13	#10
Beef	73	#20	#18
Cheese	54	#12	#9
Butter	49	#13	#7
Apples	21	#9	#14

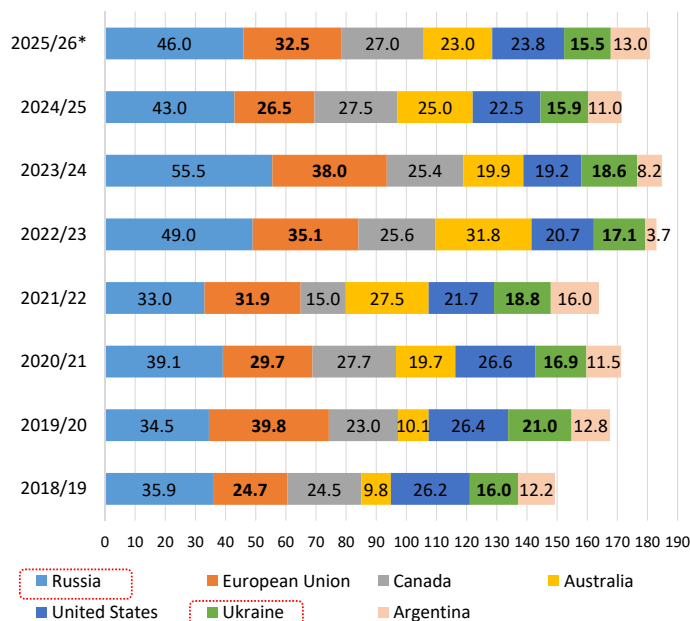
Source: USDA, rank by natural indicators

WORLD CORN EXPORT FROM KEY EXPORTING COUNTRIES, million metric tonnes (forecast as of August 12, 2025)



Source: based on the data of the USDA-WASDE

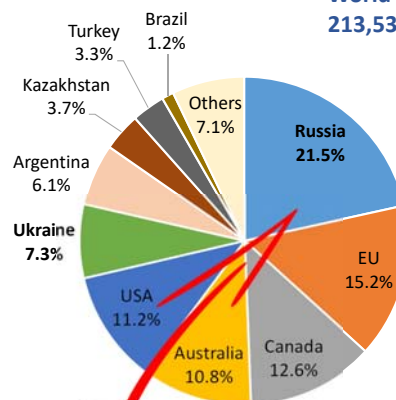
WORLD WHEAT EXPORT FROM KEY EXPORTING COUNTRIES, million metric tonnes
(forecast as of August 12, 2025)



Source: based on data of the USDA-WASDE

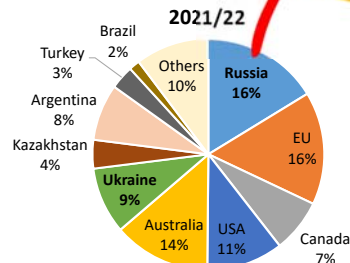
2025/26*

**World total
213,532 KT**

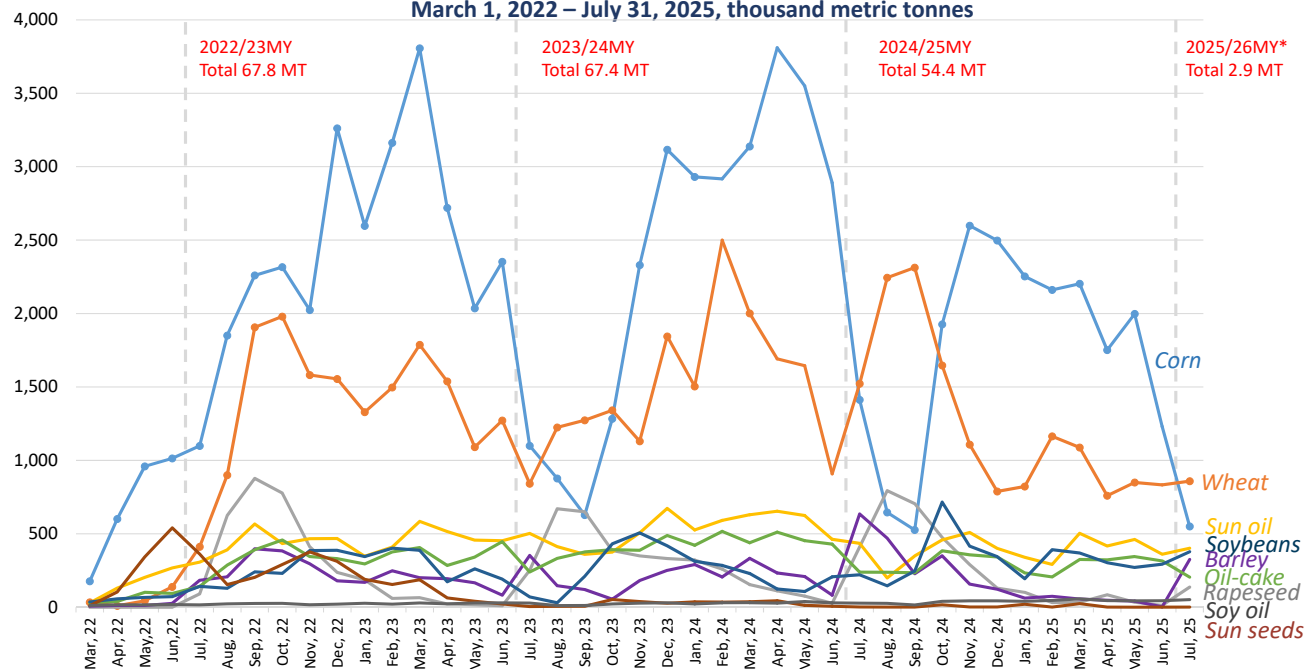


2021/22

**World total
202,767 KT**

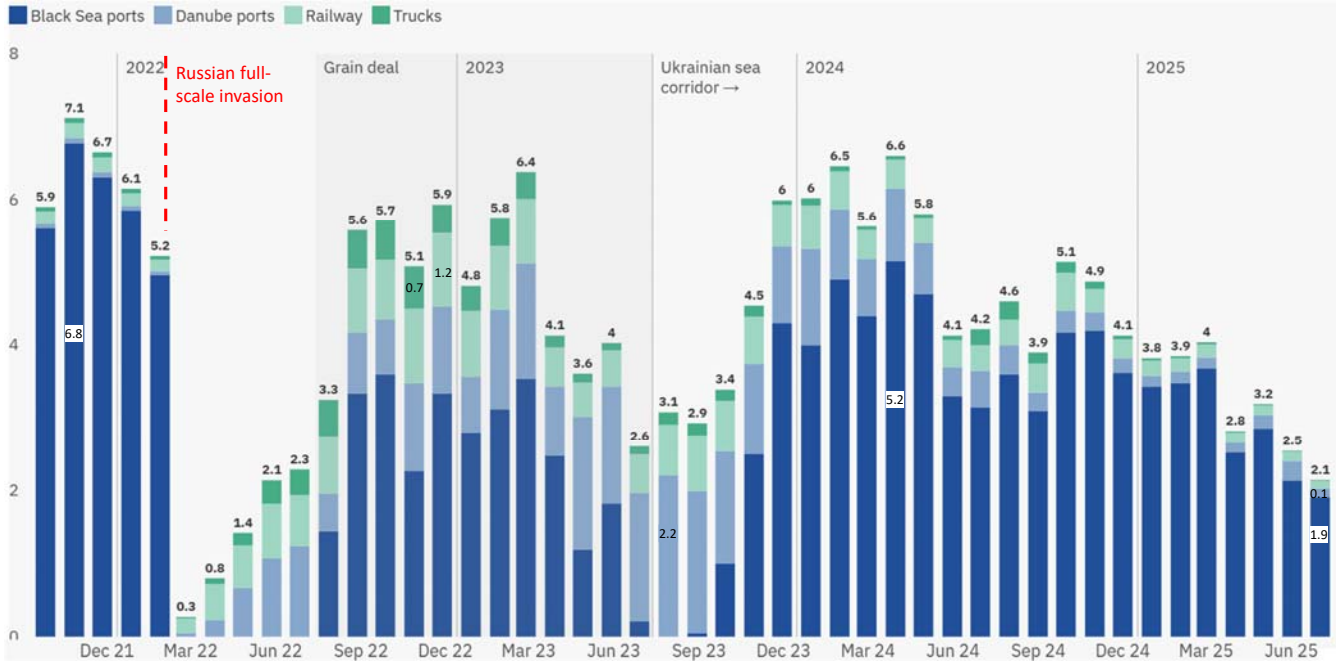


**EXPORT SHIPMENTS FROM UKRAINE DURING THE WAR TIME BY TYPES OF AGRICULTURAL COMMODITIES,
March 1, 2022 – July 31, 2025, thousand metric tonnes**



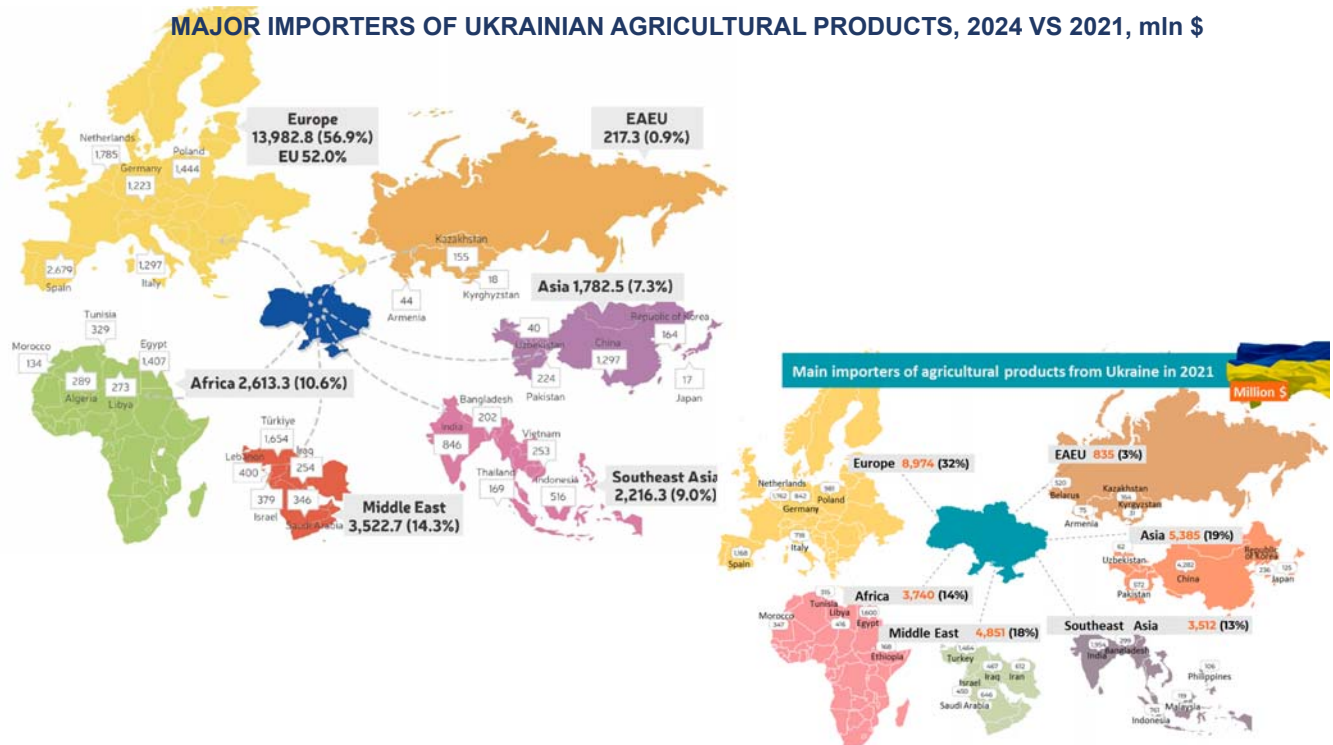
Source: based on data of the Ministry of Agrarian Policy and Food of Ukraine and Ministry of Infrastructure of Ukraine

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

MAJOR IMPORTERS OF UKRAINIAN AGRICULTURAL PRODUCTS, 2024 VS 2021, mIn \$



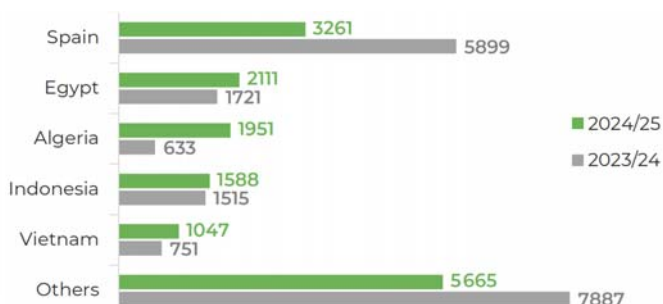
Dynamics of grain exports from Ukraine, thsd tonnes



Dynamics of wheat export from Ukraine, thsd tonnes



Geography of wheat exports (July-June), thsd tonnes



Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

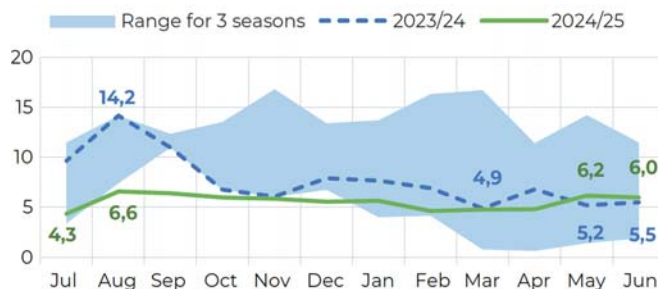
Wheat flour

thsd tonnes	July - June		
	2023/24	2024/25	24/25 to 23/24, %
Production of wheat flour	959.8	935.9	-2%
Export of wheat flour	92.6	66.7	-28%

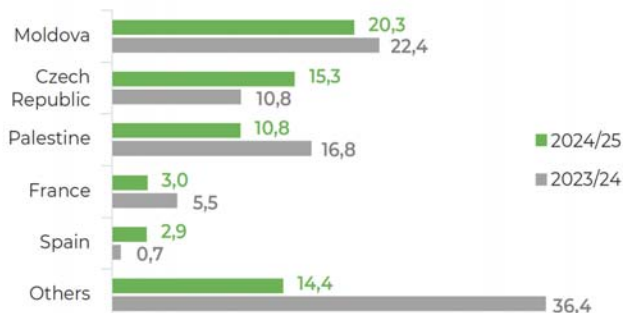
Dynamics of flour production in Ukraine, thsd tonnes



Dynamics of flour export from Ukraine, thsd tonnes

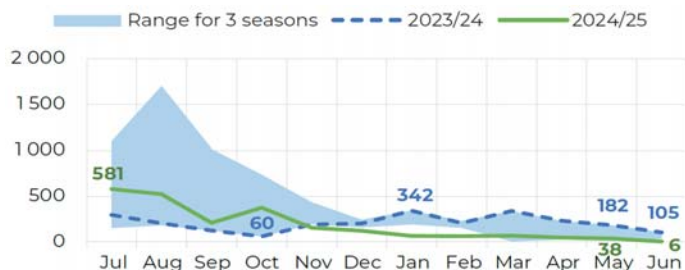


Geography of wheat flour export (July-June), thsd tonnes

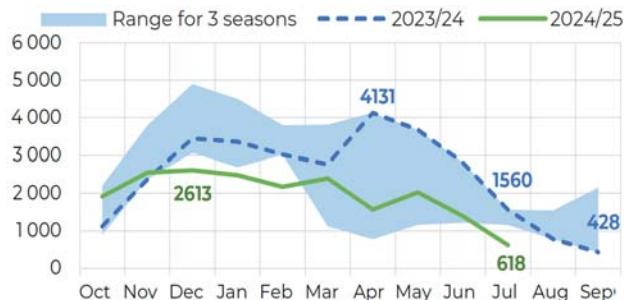


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

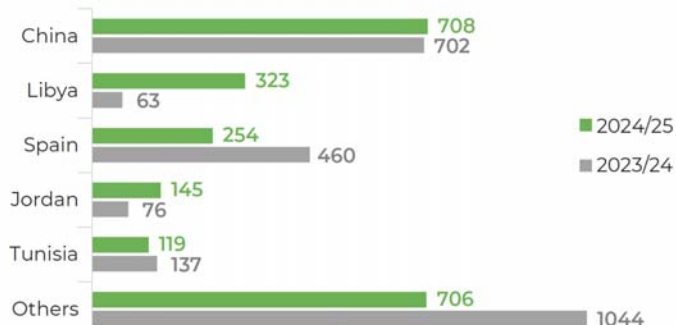
Dynamics of barley export from Ukraine, thsd tonnes



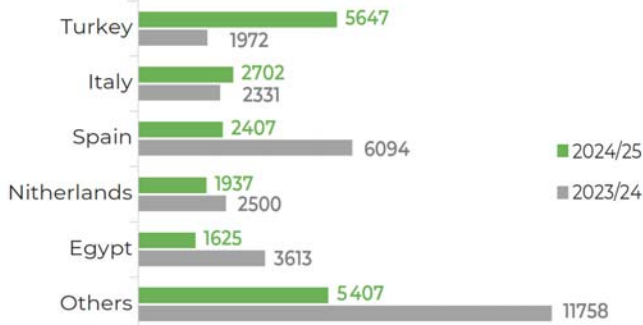
Dynamics of corn export from Ukraine, thsd tonnes



Geography of barley exports (July-June), thsd tonnes



Geography of corn exports (October-July), thsd tonnes

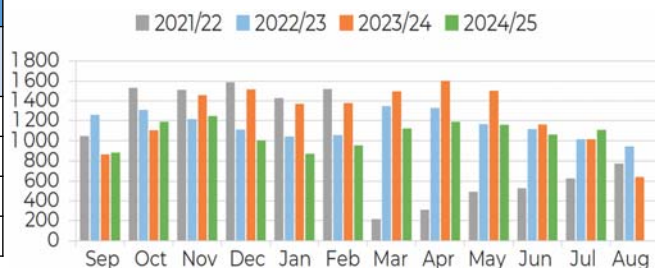


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

Sunflower

thsd tonnes	Sept - July		
	2023/24	2024/25	24/25 to 23/24, %
Sunflower processing	14,459	11,787	-18%
Production of sunflower oil	6,346	5,144	-19%
Export of sunflower oil	6,021	4,581	-24%
Export of sunflower seeds	312	68	-78%

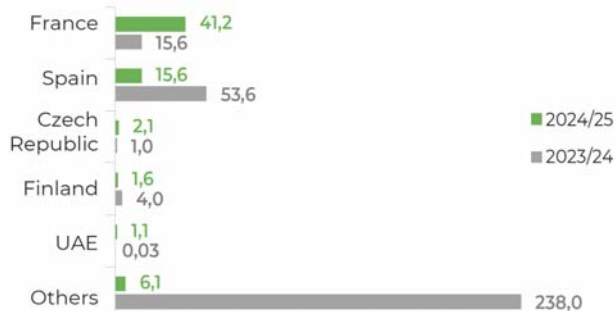
Sunflower processing dynamics in Ukraine, thsd t



Sunflower export from Ukraine, thsd tonnes



Geography of sunflower exports for September-July, thsd tonnes

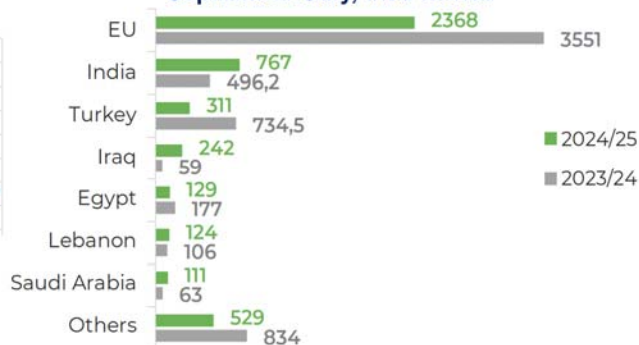


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

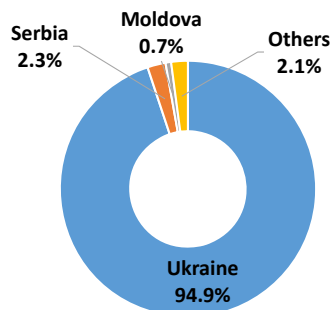
Export of sunflower oil from Ukraine, thsd tonnes



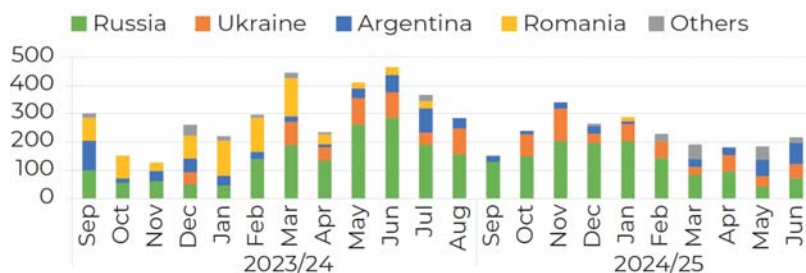
Geography of sunflower oil exports for September-July, thsd tonnes



Main suppliers of sunflower oil to EU, thsd tonnes



Main suppliers of sunflower oil to India, thsd tonnes

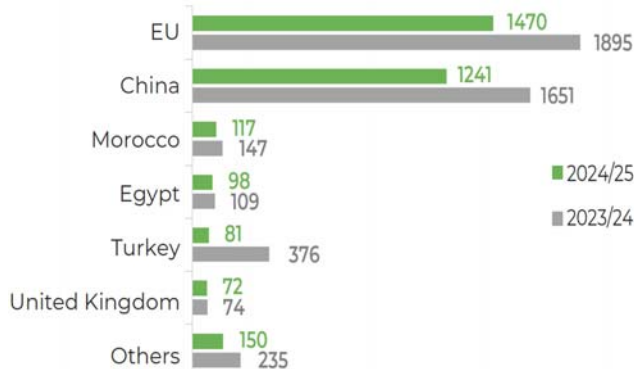


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

Sunflower

thsd tonnes	Sept - July		
	2023/24	2024/25	24/25 to 23/24, %
Production of meal (cake)	5,570.0	4,413.0	-21%
Export of meal (cake)	4,487.6	3,229.5	-28%

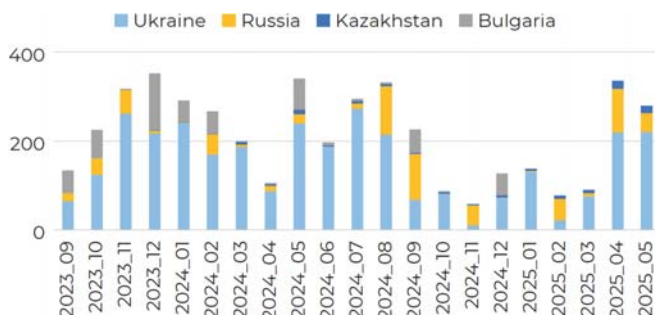
Geography of sunflower meal (cake) export for September-July, thsd tonnes



Export of sunflower meal (cake) from Ukraine, thsd ton



Main suppliers of sunflower meal to China, thsd ton



Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

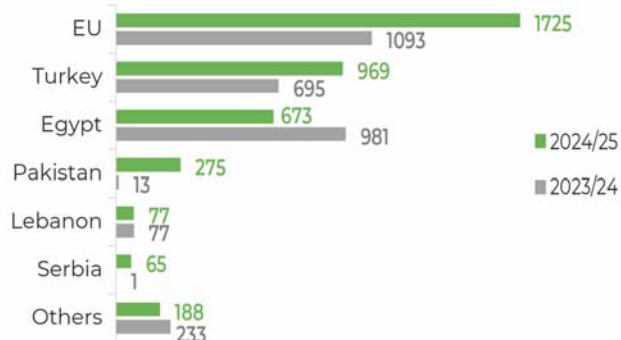
Soybeans

thsd tonnes	Sept - July		
	2023/24	2024/25	24/25 to 23/24, %
Processing of soybeans	1,838.7	2,600.2	+41%
Export of soybeans	3,093.0	3,971.4	+28%

Dynamics of soybean processing in Ukraine, thsd tonnes



Geography of soybean exports for September-July, thsd tonnes



Export of soybeans from Ukraine, thsd tonnes

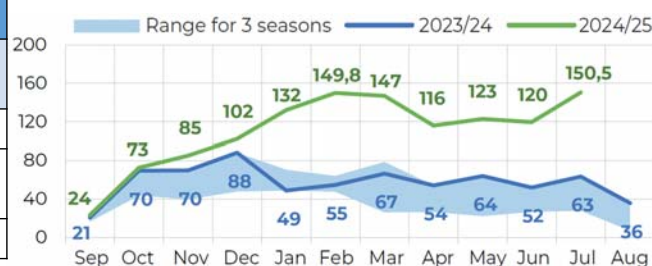


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

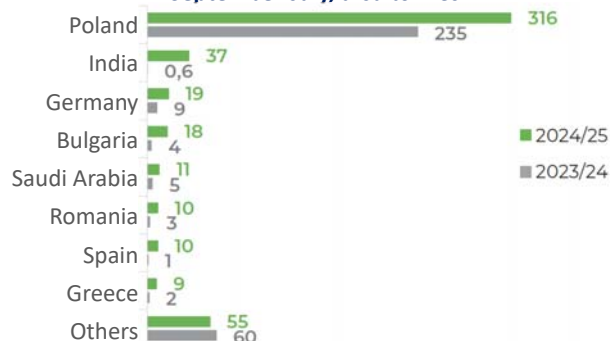
Soybeans

thsd tonnes	Sept - July		
	2023/24	2024/25	24/25 to 23/24, %
Export of soybean oil	320.0	484.0	+51%
Production of soybean meal (cake)	1,457	1,966	
Export of soybean meal (cake)	653.1	1,221.3	+87%

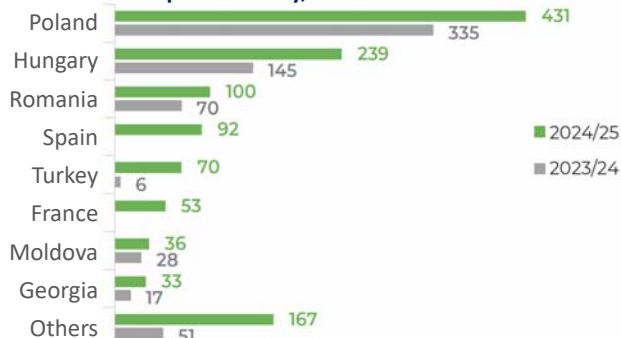
Export of soybean meal from Ukraine, thsd tonnes



Geography of soybean oil exports from Ukraine for September-July, thsd tonnes



Geography of soybean meal exports from Ukraine for September-July, thsd tonnes

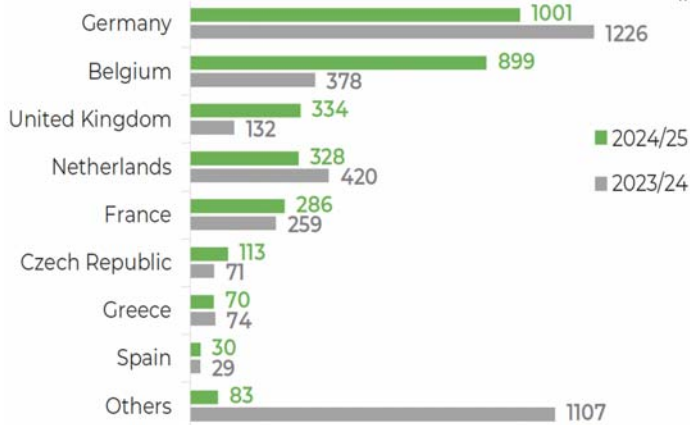


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

Rapeseed

thsd tonnes	July - June		
	2023/24	2024/25	24/25 to 23/24, %
Rapeseed processing	990	535	-46%
Rapeseed export	3,698	3,144	-15%

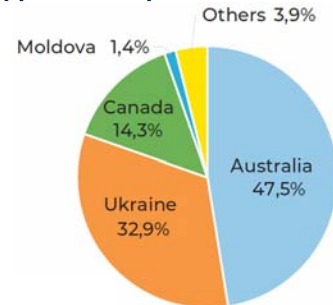
Geography of rapeseed exports for July-June, thsd tonnes



Export of rapeseed from Ukraine, thsd tonnes



Main suppliers of rapeseeds to the EU in 2024/25

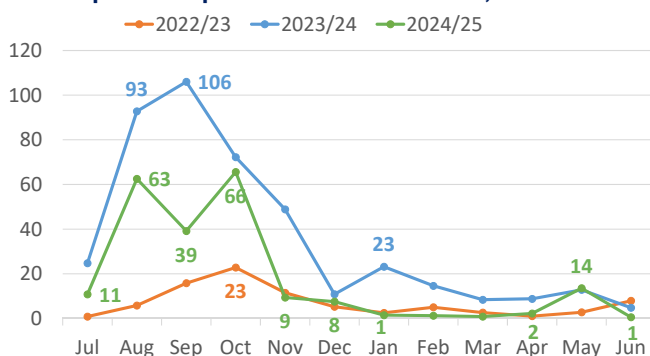


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

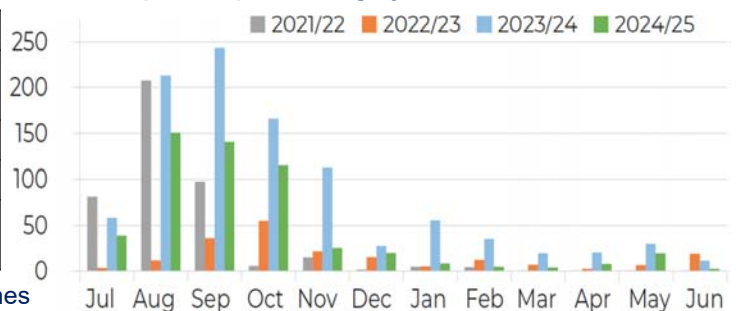
Rapeseed

thsd tonnes	July - June		
	2023/24	2024/25	24/25 to 23/24, %
Rapeseed processing	990	535	-46%
Export of rapeseed oil	428	215	-50%
Export of rapeseed meal	425	535	-48%

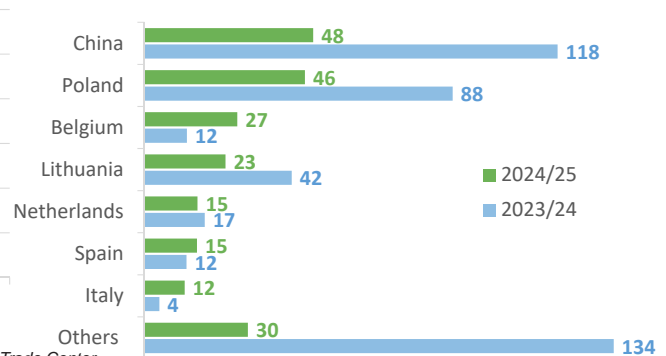
Export of rapeseed oil from Ukraine, thsd tonnes



Rapeseed processing dynamic in Ukraine, thsd tonne

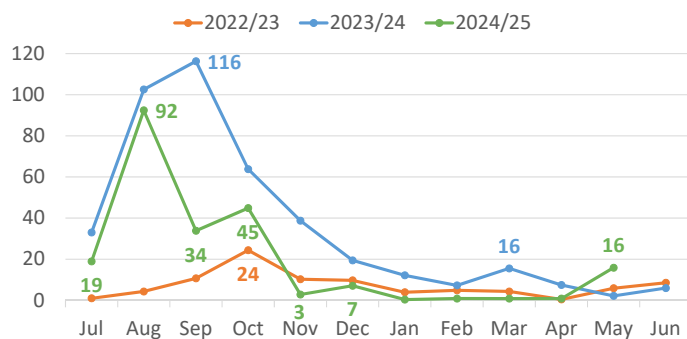


Geography of rapeseed oil exports for July-June, thsd tonnes

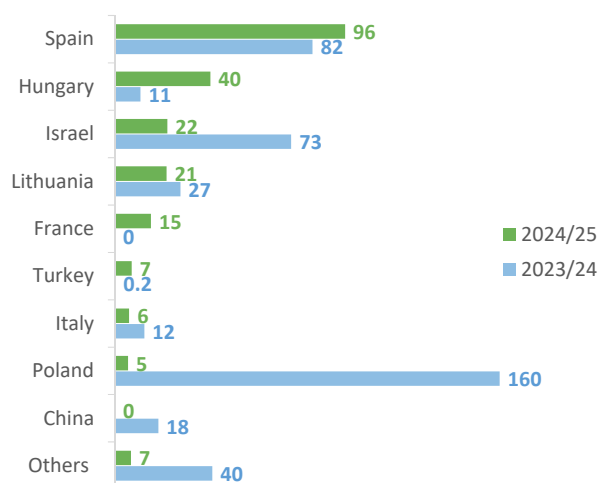


Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

Export of rapeseed meal (cake) from Ukraine, thsd tonnes



Geography of rapeseed meal exports for July-June, thsd tonnes



Source: based on the data of the State Statistics Service in Ukraine, APK-Inform, International Trade Center

BALANCE OF SUPPLY AND DEMAND OF GRAIN IN UKRAINE

*forecast as of August 8, 2025

	2021/22	2022/23	2023/24	2024/25	2025/26*	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2024/25 to 2023/24	2025/26* to 2024/25
Initial stocks	4,817	16,270	8,158	3,810	5,889	-53.3 %	+54.6 %
Sown area, thousand hectares	15,995	12,171	10,985	11,139	11,787	+1.4 %	+5.8 %
Harvested area, thousand hectares	15,948	11,773	10,836	11,106	11,493	+2.5 %	+3.5 %
Yield, tonnes / hectare	5.39	4.58	5.52	5.06	4.63	-8.3 %	-8.5 %
Gross harvest	86,010	53,864	59,772	56,246	53,217	-5.9 %	-5.4 %
Import	125	152	98	124	101	+26.3 %	-19.9 %
Total supply	90,952	70,286	68,029	60,180	59,207	-11.5 %	-1.6 %
Domestic consumption:	25,396	14,888	13,547	14,325	14,423	+5.7 %	+0.7 %
food	4,611	4,230	3,834	3,562	3,450	-7.1 %	-3.2 %
fodder	13,325	6,625	5,830	6,940	7,520	+19.0 %	+8.4 %
seeds	1,666	1,441	1,495	1,552	1,520	+3.8 %	-2.1 %
losses	4,812	1,777	1,677	1,457	1,155	-13.1 %	-20.7 %
other (alcohol, malt, starch, etc.)	982	815	711	814	778	+14.5 %	-4.4 %
Export	49,286	47,240	50,672	39,966	39,853	-20.1 %	-0.3 %
Total distribution (demand)	74,682	62,128	64,219	54,291	54,276	-15.5 %	+0.0 %
Ending stocks	16,270	8,158	3,810	5,889	4,931	+54.6 %	-16.3 %
Ratio of ending stocks to distribution	21 %	13 %	6 %	11 %	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 8, 2025*

	2022/23	2023/24	2024/25*	2025/26**	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2024/25* to 2023/24	2025/26** to 2024/25*
Initial stocks	4,695.9	709.6	248.0	351.0	- 65.0 %	+ 41.5 %
Sown area, thousand hectares	8,561.5	9,513.0	10,085.0	9,780.0	+ 6.0 %	- 3.0 %
Harvested area, thousand hectares	8,236.0	9,424.3	9,921.6	9,350.9	+ 5.3 %	- 5.8 %
Yield, tonnes / hectare	2.50	2.70	2.40	2.41	- 11.2 %	+ 0.4 %
Gross harvest	20,628.2	25,420.1	23,773.2	22,495.9	- 6.5 %	- 5.4 %
Import	72.6	28.6	26.7	27.0	- 6.6 %	+ 1.0 %
Total supply	25,396.7	26,158.3	24,047.9	22,873.9	- 8.1 %	- 4.9 %
Domestic consumption:	16,278.2	18,641.9	16,384.2	17,525.3	- 12.1 %	+ 7.0 %
processing for oil	15,792.5	18,066.3	15,885.0	17,010.0	- 12.1 %	+ 7.1 %
seeds	242.6	328.3	269.6	292.0	- 17.9 %	+ 8.3 %
other	51.0	52.2	48.4	48.9	- 7.2 %	+ 1.1 %
losses	192.1	195.1	181.2	174.4	- 7.1 %	- 3.7 %
Export	8,407.0	7,268.4	7,312.7	5,050.0	+ 0.6 %	- 30.9 %
Total distribution (demand)	24,685.3	25,910.3	23,696.9	22,575.3	- 8.5 %	- 4.7 %
Ending stocks	709.6	248.0	351.0	298.6	+ 41.5 %	- 14.9 %
Ratio of ending stocks to distribution	2.9%	1.0%	1.5%	1.3%		

Note: MY September-August

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

AREA OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE, thousand hectares

as of August 15, 2025

Crops	2021	2022	2023	2024	2025*		Change in area,%	
	Harvested	Harvested	Harvested	Harvested	Planted	Harvested*	2024 to 2021	2024 to 2023
Grain and legumes total, including:	15,948.4	11,772.9	10,835.9	11,106.4	11,786.9	6,186.6	- 30.4 %	+ 2.5 %
•wheat	7,090.2	5,281.5	4,658.4	4,883.8	5,166.1	4,396.2	- 31.1 %	+ 4.8 %
•barley	2,472.1	1,740.2	1,494.3	1,398.2	1,385.6	1,247.2	- 43.4 %	- 6.4 %
•corn	5,481.8	4,124.5	3,975.2	4,070.5	4,540.8		- 25.7 %	+ 2.4 %
•peas	240.2	125.7	150.0	210.4	278.8	230.3	- 12.4 %	+ 40.3 %
•buckwheat	91.9	121.0	147.9	90.3	57.1	0.2	- 1.7 %	- 38.9 %
•millet	97.1	49.1	87.9	92.6	33.5	2.1	- 4.6 %	+ 5.3 %
Soybeans	1,322.9	1,527.2	1,834.0	2,635.0	2,079.8		+ 99.2 %	+ 43.7 %
Rapeseed	1,004.5	1,156.2	1,431.6	1,254.4	1,209.6	1,184.8	+ 24.9 %	- 12.4 %
Sunflower	6,665.1	5,238.0	5,201.6	4,892.6	5,161.1		- 26.6 %	- 5.9 %

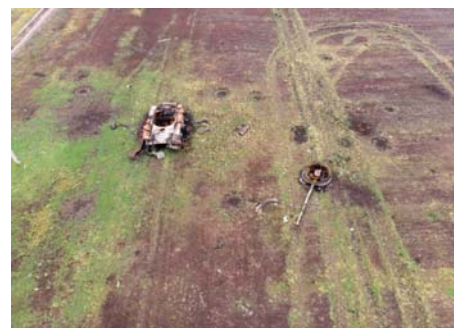
Note: data exclude the territories which are temporarily occupied by the Russian Federation and part of territories where the military actions are/were conducted.

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

AVERAGE YIELDS OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE,
metric tonnes per hectare, as of August 15, 2025

Crops	Average yields, metric tonnes per hectare					Change in yields per hectare, %
	2021	2022	2023	2024	2025*	
Grain and legumes total, including:	5.39	4.58	5.52	5.06		- 6.1 %
•wheat	4.53	3.93	4.64	4.59	4.32	+ 1.3 %
•barley	3.82	3.22	3.69	3.80	3.79	- 0.5 %
•corn	7.68	6.35	7.81	6.60		- 14.1 %
•peas	2.36	2.06	2.45	2.20	2.49	- 6.8 %
•buckwheat	1.15	1.22	1.42	1.48		+ 28.7 %
•millet	2.35	1.84	2.31	1.69		- 28.1 %
Soybeans	2.64	2.26	2.59	2.44		- 7.6 %
Rapeseed	2.93	2.87	2.92	2.85	2.54	- 2.7 %
Sunflower	2.46	2.16	2.45	2.18		- 11.4 %

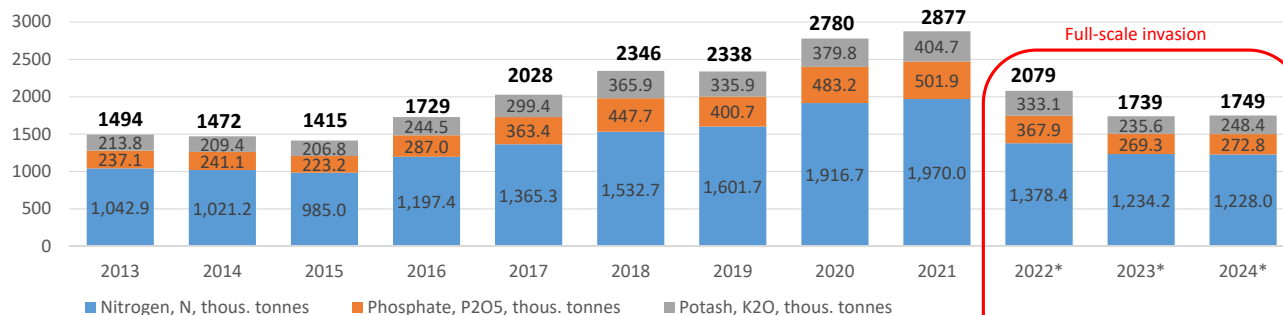


Note: data exclude the territories which are temporarily occupied by the Russian Federation and part of territories where the military actions are/were conducted.

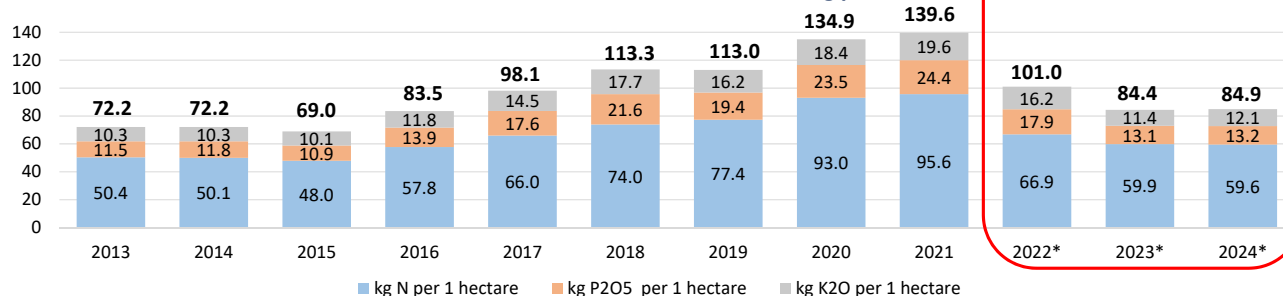
Note: includes data from territories under Ukrainian control as of the reporting date and can be updated

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

TOTAL USE OF INORGANIC FERTILIZERS IN UKRAINE, thousand tonnes

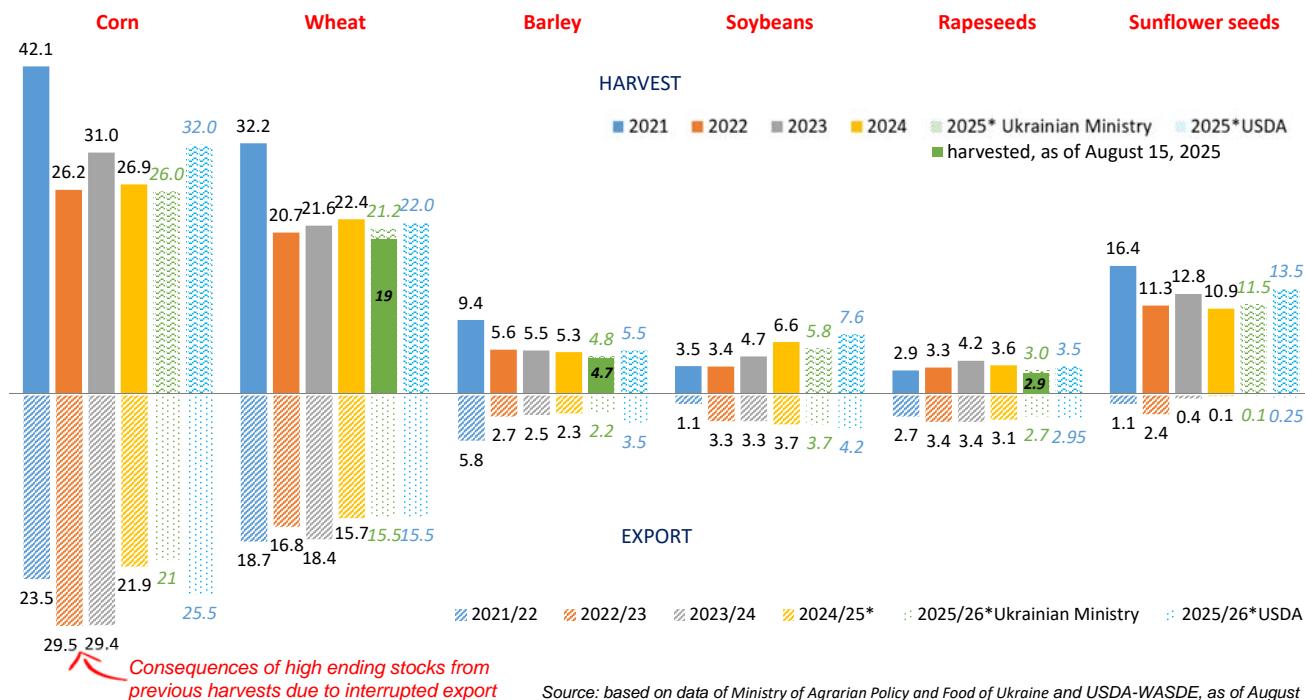


USE OF INORGANIC FERTILIZERS PER UNIT OF AGRICULTURAL LAND, kg per hectare

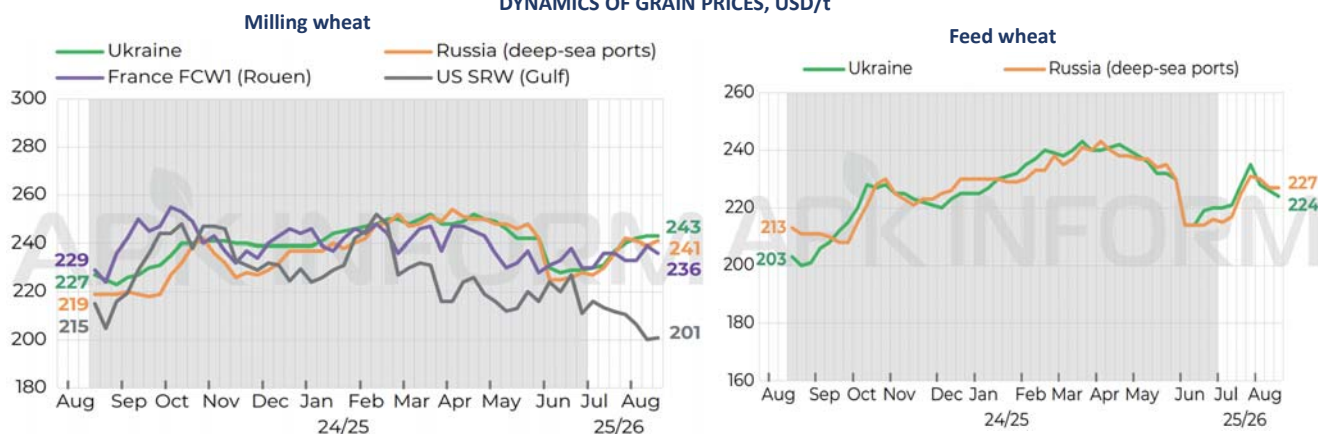


Source: based on data of the State Statistic Service of Ukraine Note: * Data can be updated

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



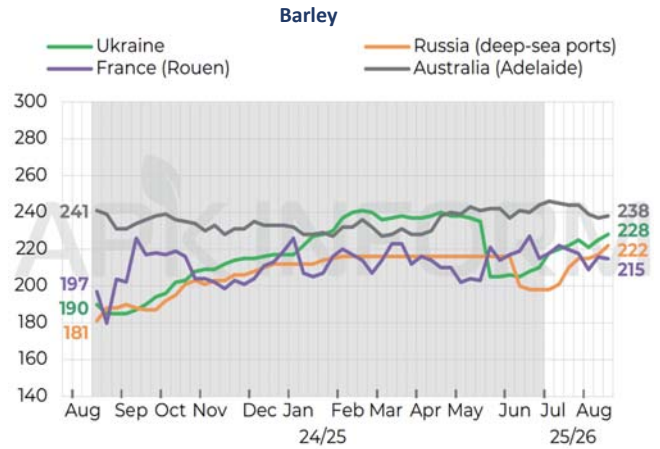
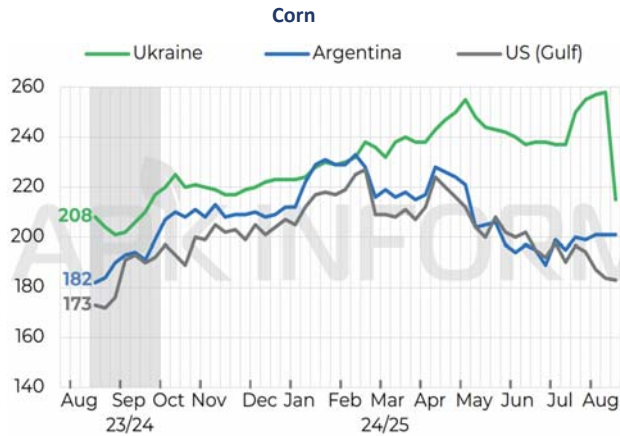
DYNAMICS OF GRAIN PRICES, USD/t



	Stock / month	Country of origin	Terms of delivery	Aug 15	Aug 8	Aug 1	July 25	July 18	Last weekly change	
									USD/t	%
Futures market										
Wheat	CBOT, Sep	USA	EXW	186.1	189.0	189.8	197.8	200.7	- 2.9	- 1.6 %
Milling wheat	Euronext, Sep	France	CPT Rouen	228.2	229.1	222.3	230.0	234.9	- 0.9	- 0.4 %
Wheat	LIFFE, Nov	EU	EXW	226.4	231.0	231.0	240.4	241.2	- 4.6	- 2.0 %
Wheat	BCA, Dec	Argentina	EXW	193.0	195.5	198.5	204.5	201.0	- 2.5	- 1.3 %
Cash market										
Wheat SRW	Aug	USA	CPT Gulf of Am.	200.8	200.1	206.4	210.6	211.7	+ 0.7	+ 0.4 %
Wheat hard	Aug	Argentina	FOB	235.0	234.0	235.0	233.0	232.0	+ 1.0	+ 0.4 %
Milling wheat	Aug	France	FOB	236.0	239.0	233.0	233.0	236.0	- 3.0	- 1.3 %

Source: APK-inform

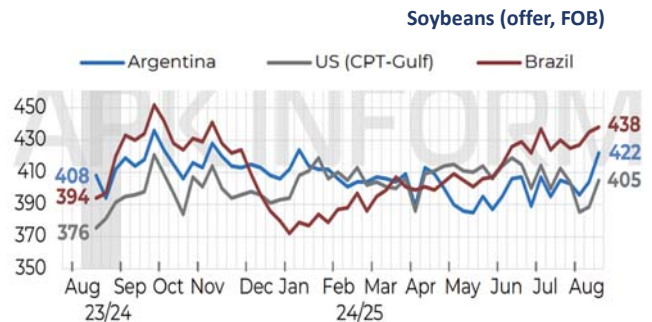
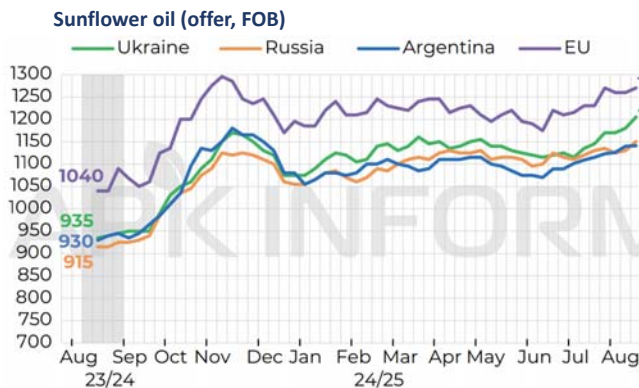
DYNAMICS OF GRAIN PRICES, USD/t



	Stock / month	Country of origin	Terms of delivery	Aug 15	Aug 8	Aug 1	July 25	July 18	Last weekly change		
										USD/t	%
Futures market											
Corn yellow	CBOT, Sep	USA	EXW	151.0	150.6	153.3	157.2	160.8	+ 0.4	+ 0.3 %	
Corn	Euronext, Nov	France	FOB	219.5	223.0	224.6	237.9	243.3	- 3.5	- 1.6 %	
Corn hard	BCA, Sep	Argentina	EXW	177.0	178.1	179.9	178.9	176.0	- 1.1	+ 0.4 %	
Cash market											
Corn yellow	Aug	USA	CPT Gulf of Am.	183.0	183.8	187.2	194.3	196.7	- 0.8	- 0.4 %	
Corn	Aug	Argentina	FOB	201.0	201.0	201.0	199.0	200.0	0.0	0.0%	
Fodder barley	Aug	France	FOB	214.8	215.7	208.9	217.6	219.8	- 0.9	- 0.5%	

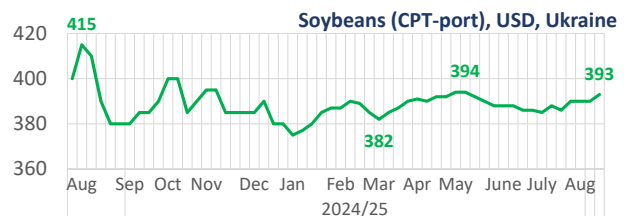
Source: APK-inform

PRICES DYNAMICS OF OILSEEDS AND BY-PRODUCTS, USD/t



Export prices for oil crops and by-products in Russia

	Min	weekly change	Max	weekly change	average	weekly change
Offer, FOB, USD/t (Aug-Sep)						
Crude SFO	1135	15	1160	20	1150	20
Sunflower meal	225		240		230	
Bid, FOB, USD/t (Oct-Dec)						
Crude SFO	1100	10	1125	10	1100	10
Bid, FOB, USD/t (Aug-Sep)						
Crude SFO	1110	10	1120	10	1115	10
Sunflower meal	220	5	230		225	



Source: APK-inform

BALANCE OF SUPPLY AND DEMAND OF GRAIN IN RUSSIA
(*forecast as of August 14, 2025)

	2021/22	2022/23	2023/24	2024/25	2025/26*	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2024/25 to 2023/24	2025/26* to 2024/25
Initial stocks	23,104	30,433	56,332	51,204	44,670	-9.1 %	-12.8 %
Sown area, thousand hectares	47,007	47,504	47,894	46,128	43,796	-3.7 %	-5.1 %
Harvested area, thousand hectares	47,504	46,880	46,709	45,113	42,721	-3.4 %	-5.3 %
Yield, tonnes / hectare	2 56	33 6	31 0	27 9	30 2	-10 1 %	+8 4 %
Gross harvest	121,399	157,615	144,956	125,883	129,224	-13.2 %	+2.7 %
Import	264	178	153	153	127	-0.4 %	-17.0 %
Total supply	144,768	188,226	201,442	177,240	174,020	-12.0 %	-1.8 %
Domestic consumption:	80,634	84,330	86,660	84,595	85,225	-2.4 %	+0.7 %
food	18,130	18,590	19,155	18,125	17,975	-5.4 %	-0.8 %
fodder	43,690	45,565	47,450	47,670	48,240	+0.5 %	+1.2 %
seeds	10,321	10,145	9,967	9,479	9,984	-4.9 %	+5.3 %
losses	3,695	4,790	4,934	4,279	4,212	-13.3 %	-1.6 %
other (alcohol, malt, starch, etc.)	4,798	5,240	5,154	5,042	4,814	2.2 %	4.5 %
Export	34,058	47,564	63,578	47,975	51,120	-24.5 %	+6.6 %
Total distribution (demand)	114,695	131,894	150,238	132,570	136,345	-11.8 %	+2.8 %
Ending stocks	30,433	56,332	51,204	44,670	37,675	-12.8 %	-15.7 %
Ratio of ending stocks to distribution	26%	43%	34%	34%	28%		

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

BALANCE OF SUPPLY AND DEMAND OF MAJOR OILSEEDS IN RUSSIA (sunflower, soybeans and rapeseeds)
(*forecast as of August 12, 2025)

	2022/23	2023/24	2024/25*	2025/26**	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	thousand tonnes	2024/25* to 2023/24	2025/26** to 2024/25
Initial stocks	2,256.5	1,103.8	757.5	480.8	- 31.4 %	- 36.5 %
Sown area, thousand hectares	16,432.0	16,270.0	17,171.0	18,900.0	+ 5.5 %	+ 10.1 %
Harvested area, thousand hectares	15,453.0	15,838.0	16,489.8	18,180.4	+ 4.1 %	+ 10.3 %
Yield, tonnes / hectare	1.85	1.89	1.76	1.75	- 6.5 %	- 1.1 %
Gross harvest	28,537.5	29,886.7	29,081.3	31,725.2	- 2.7 %	+ 9.1 %
Import	1,057.6	2,162.4	1,541.0	1,639.0	- 28.7 %	+ 6.4 %
Total supply	31,851.5	33,152.9	31,379.9	33,845.0	- 5.3 %	+ 7.9 %
Domestic consumption:	27,780.0	29,940.0	29,070.0	30,850.0	- 2.9 %	+ 6.1 %
processing for oil	26,888.5	28,945.8	27,927.6	29,668.9	- 3.5 %	+ 6.2 %
seeds	511.1	603.8	658.8	652.0	+ 9.1 %	- 0.1 %
other	100.3	58.9	169.8	190.7	up 2.9 times	+ 12.3 %
losses	318.6	331.5	313.8	338.4	- 5.4 %	+ 7.9 %
Export	2,929.2	2,455.4	1,829.1	2,520.0	- 25.5 %	+ 37.8 %
Total distribution (demand)	30,747.7	32,395.4	30,899.1	33,370.0	- 4.6 %	+ 8.0 %
Ending stocks	1,103.8	757.5	480.8	475.0	- 36.5 %	- 1.2 %
Ratio of ending stocks to distribution	3.7%	2.5%	3.0%	1.4%		

Note: MY September-August

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

PRODUCTION OF GRAIN, LEGUMES AND OIL CROPS IN RUSSIA

Commodity	2021		2022		2023		2024		2025*	
	Harvested area, million hectares	Produced, million tonnes	Harvested area, million hectares	Produced, million tonnes	Harvested area, million hectares	Produced, million tonnes	Harvested area, million hectares	Produced, million tonnes	Planted area, million hectares	Production forecast, million tonnes
Grains and legumes, total	45.42	121.40	46.59	157.68	46.69	144.92	45.11	125.88	45.80	129.2 (135?)
including:										
• Wheat	27.88	76.06	29.35	104.23	29.19	92.85	28.11	82.60	26.90	85.2
• Corn	2.89	15.24	2.63	15.79	2.40	16.62	2.66	13.96	2.59	13.8
• Barley	7.83	18.00	7.94	23.39	7.83	21.15	6.78	16.67	6.65	17.4
• Buckwheat	0.93	0.92	1.09	1.22	1.23	1.48	1.05	1.21	0.75	0.8
• Rice	0.19	1.08	0.17	0.92	0.19	1.07	0.21	1.26	0.20	1.1
Rapeseeds	1.63	2.79	2.28	4.51	2.07	4.20	2.66	4.66	2.90	5.3
Soybeans	2.99	4.76	3.36	6.00	3.55	6.83	4.23	7.06	4.73	8.1
Sunflower seeds	9.66	15.66	9.19	16.36	9.35	17.26	9.63	16.91	11.04	18.4

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

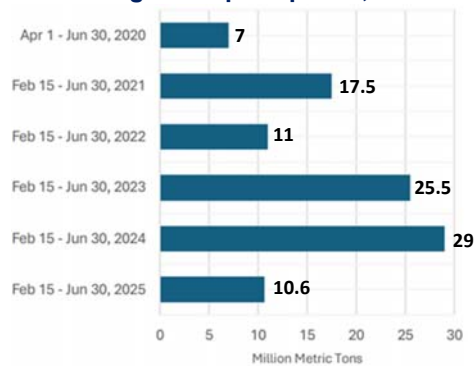
Wheat export dynamic from Russia, thsd tonnes



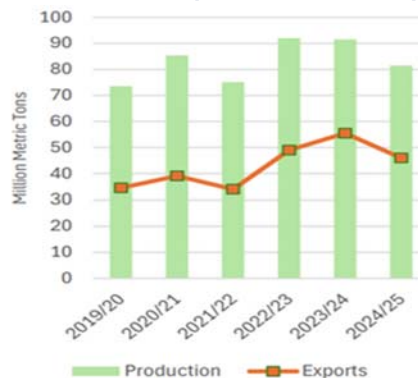
Flour export dynamic from Russia, thsd tonnes



Russia grain export quotas, mln



Russia Wheat production and export (Jul-June), mln tonnes



Grain exports forecast MY 2025/26*

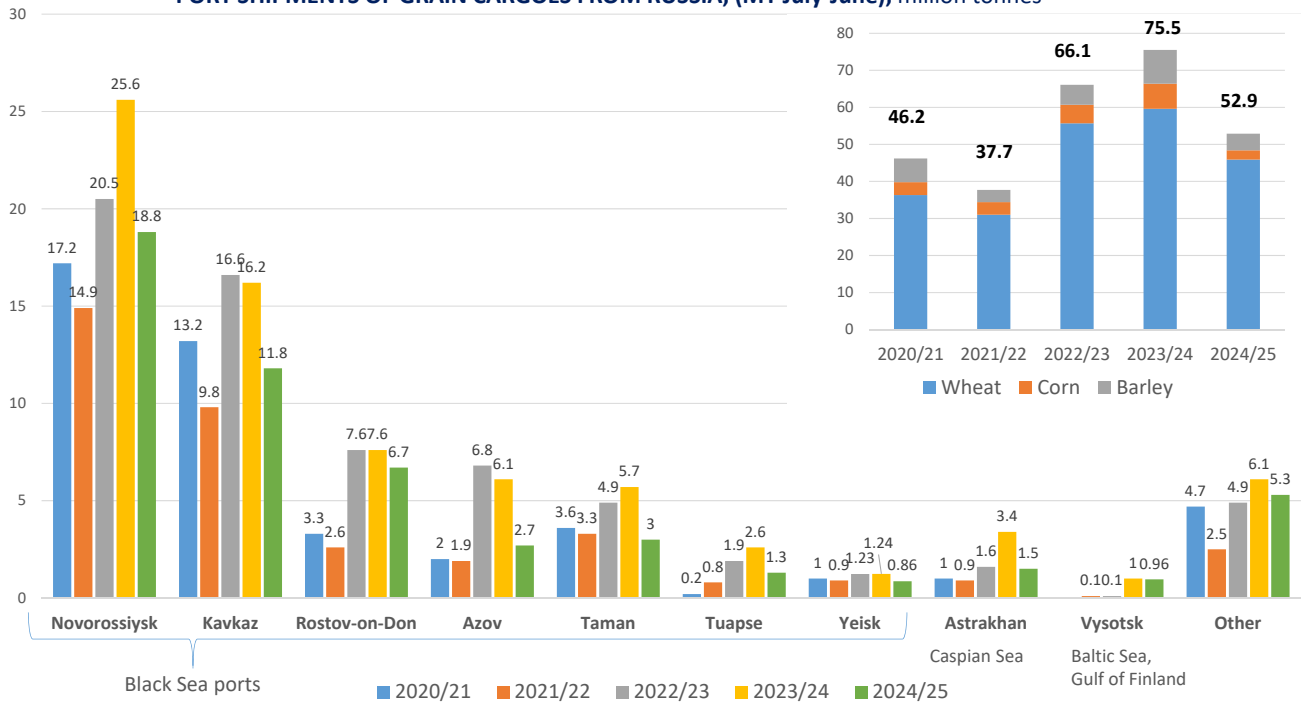
Total 51.1 MT (+7% compared to the 2024/25 MY), of which:

- wheat - 42.0 MT(+6%),
- barley - 3.5 MT(11%),
- corn - 3.0 MT(+54%).

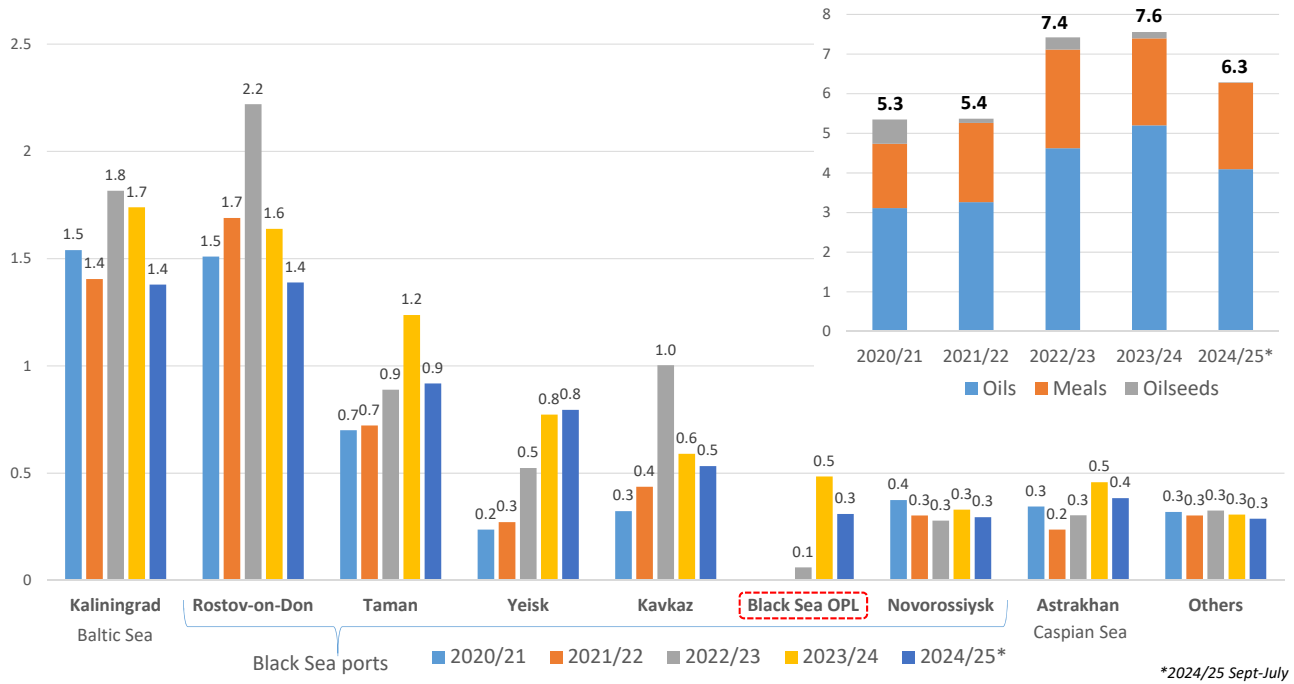
SEA PORTS IN RUSSIA



PORT SHIPMENTS OF GRAIN CARGOES FROM RUSSIA, (MY July-June), million tonnes



PORT SHIPMENTS OF OILSEEDS AND BYPRODUCTS FROM RUSSIA, (MY Sept-Aug), million tonnes



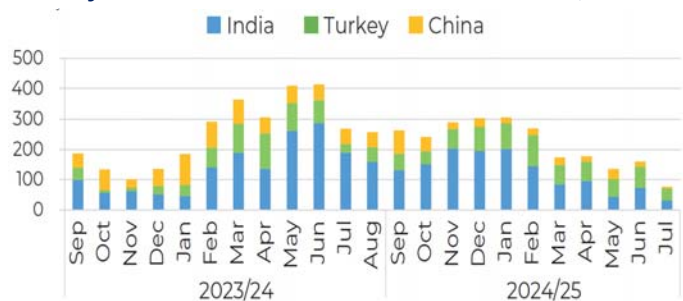
Sunflower oil production dynamics in Russia, thsd tonnes



Sunflower oil export from Russia, thsd tonnes



Key sales markets for Russian sunflower oil, thsd tonnes

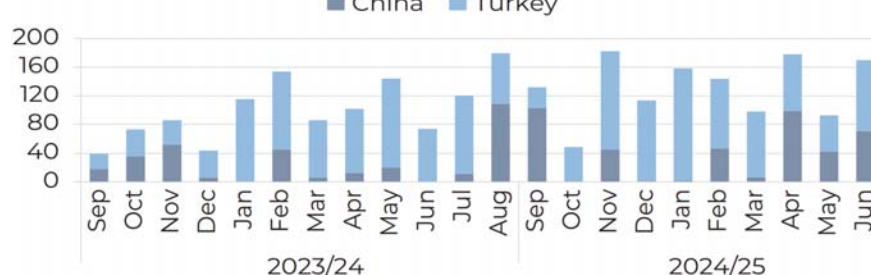


Source: International Trade Center, SEA, APK-

Sunflower meal export from Russia, thsd tonnes

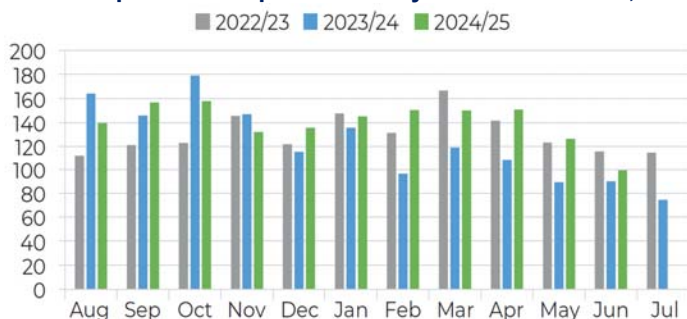


Key sales markets for Russian sunflower meal, thsd tonnes



Source: International Trade Center, SEA, APK-

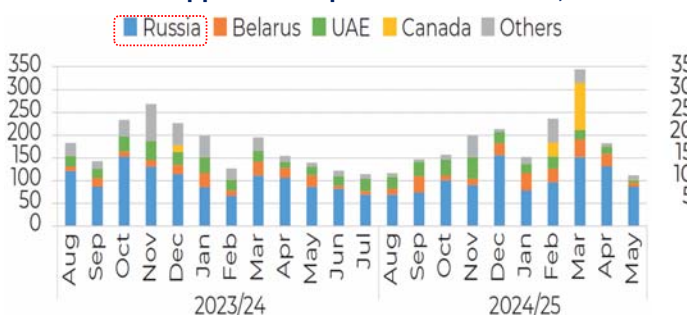
Rapeseeds oil production dynamics in Russia, thsd tonnes



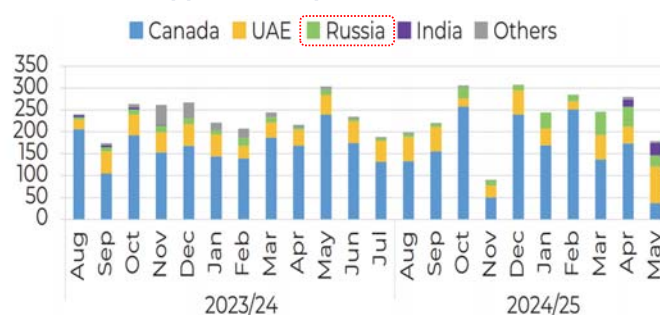
Rapeseeds oil export from Russia, thsd. tonnes



Main suppliers of rapeseed oil to China, thsd tonnes



Main suppliers of rapeseed meal to China, thsd ton



Source: International Trade Center, SEA, APK-



Thank you!

Questions?

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