



**Intesco
Research
Group**

WORLD MARKET OF GRAIN CROPS. RUSSIAN MARKET OF GRAIN CROPS - 2012



MOSCOW 2012

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

RUSSIAN AND WORLD MARKET OF GRAIN CROPS

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2013-2015

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

WORLD MARKET OF GRAIN CROPS

CULTIVATED AREAS OF FGRAIN CROPS IN RUSSIA

YIELDING CAPACITY OF GRAIN CROPS IN RUSSIA

GROSS YIELD OF GRAIN CROPS IN RUSSIA

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PROFILES OF 5 LARGEST ENTERPRISES BY GRAIN CROPS GROWING (based on the rating by volume of proceeds for 2010)

FORECAST OF THE RUSSIAN MARKET OF GRAIN CROPS DEVELOPMENT FOR 2012-2013

The largest Russian enterprises with profiles:

«AGRICULTURAL UNION «KUBAN» JSC (financials)

«AGRICULTURAL COMPANY «ZOLOTAYA NIVA» LLC (financials)

"KOLKHOZ-PLEMZAVOD "KAZMINSKIY" SKHK (financials)

"VOSTOK-ZERNOPRODUCT" JSC (financials)

«BELGOROD-SEMENA» LLC (financials)

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

Federal State Statistics Service

Ministry of Economic Development of RF

Ministry of Agriculture of RF

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sale reports

Materials of the field's main players

Field print and electronic publications

The research contains 132 schedules, 75 diagrams, 58 tables.

EXTRACTS FROM RESEARCH

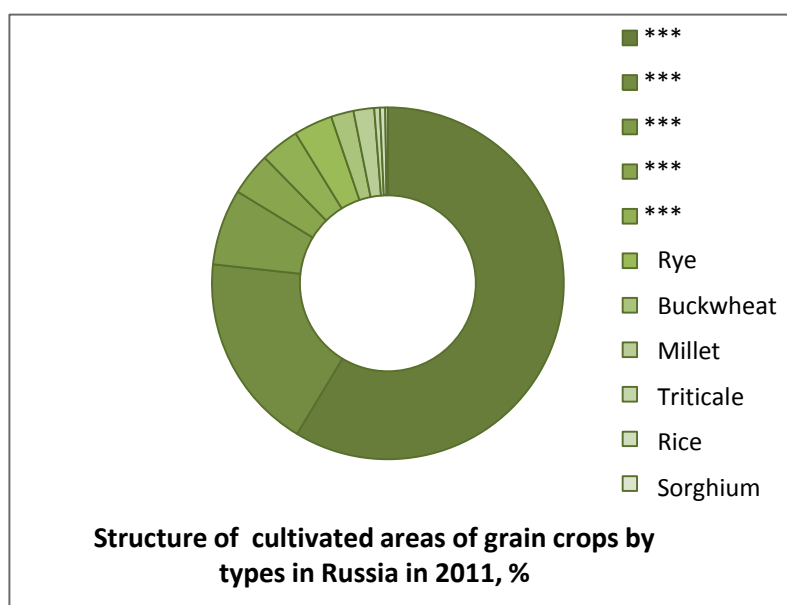
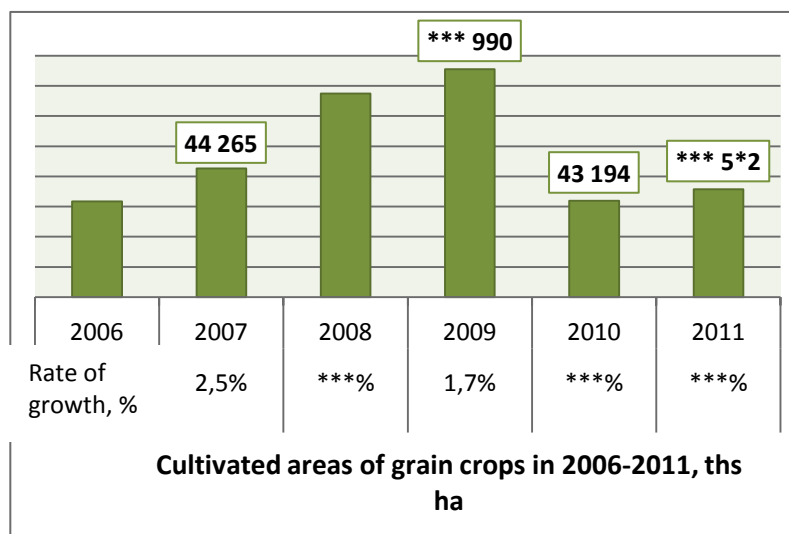
CHAPTER 3

CULTIVATED AREAS OF GRAIN CROPS IN RUSSIA

Cultivated areas in general in Russia in 2011 increased by ***% or *** ha, however they were less than areas in 2008 and 2009. The maximal parameter in 2006-2011 amounted to *** ths ha (in 2009).

Cultivated areas of grain crops in 2011 increased by ***% or*** ths ha. In 2010 the decrease amounted to ***, that was *** times more than parameters of cultivated areas in general. The largest areas were marked in 2008 and 2009 (*** ths ha and *** ths ha).

In the structure of

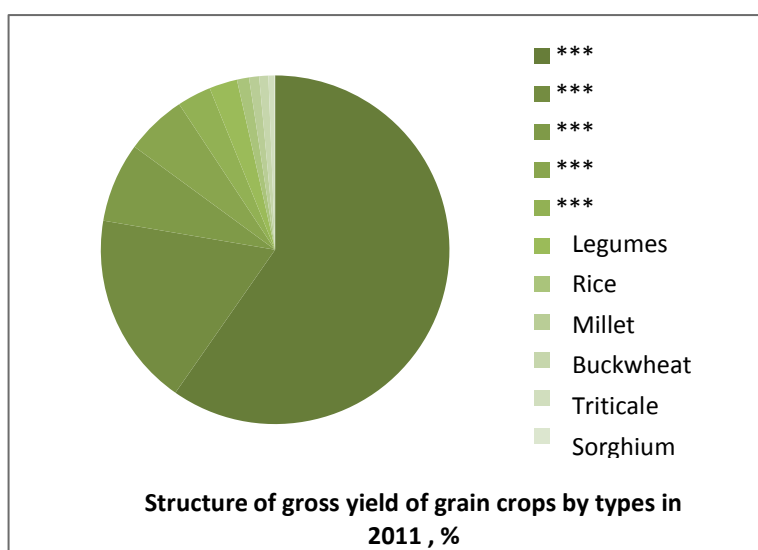
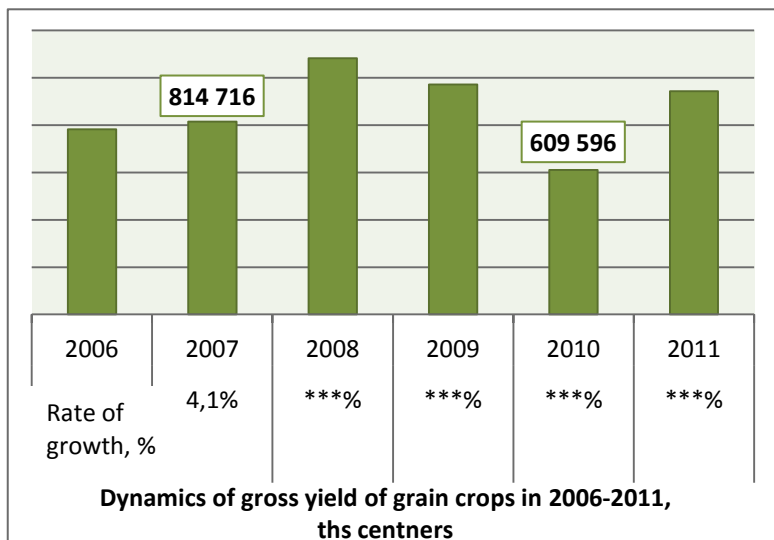


cultivated areas of grain crops in 2011 almost two thirds belonged to ***. The following wide-spread crop was *** – ***% of areas, ***% belonged to ***. Shares of corn, legumes, rye, buckwheat and millet varied from ***% to ***%. Shares of triticale, rice and sorghium amounted to ***% and less.

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IN RUSSIA

Gross yield of grain crops and legumes was characterized by general dynamics for the category. The maximal parameters of gross yield were reached in 2008 (*** mln tons), having increased compared to the level of 2007 by ***%. In 2009 and 2010 parameter decreased by ***% and ***% respectively, and reached the level of *** mln tons. the decrease was changed by a growth in 2011 and gross yield amounted to *** mln tons or ***% more than in the previous year. At the same time gross yield was lower the level of 2008 and 2009.



The major part of gross yield in 2011 belonged to *** – ***%, ***% was provided by barley, ***% corn and ***% ***. Shares of remaining crops amounted to ***% and less.

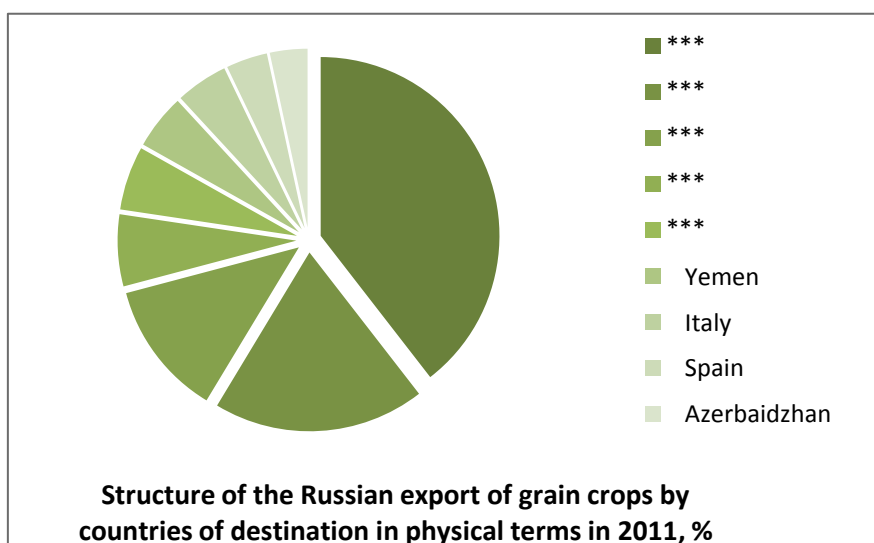
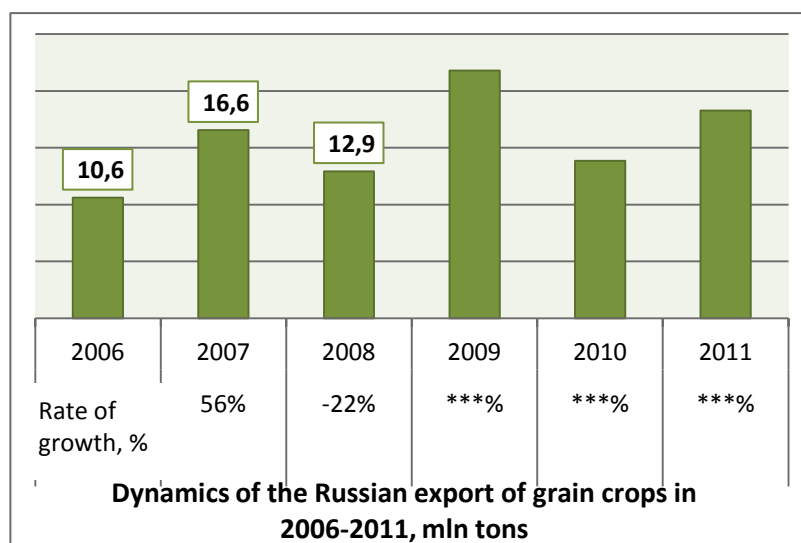
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Russian export of grain crops reached the maximum in 2009 – *** mln tons, while the rate of growth amounted to **%, which changed the decrease of 2008 (by 22% or 3,7 mln tons). In 2010 export decreased (by ***% or *** mln tons), and in 2011 increased by ***% to *** mln tons. Although export volume in 2011 remained lower the level of 2008, it exceeded the parameters for other years of the surveyed period.

In 2011 *** consumed ***% of export in physical terms, the share of *** was equal to **%, *** – ***%. Shares of other countries amounted to ***% and less. In total 9 countries

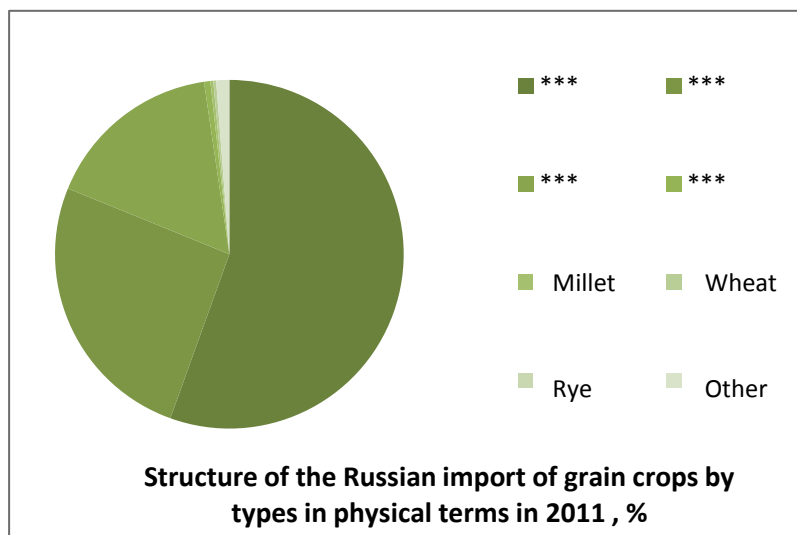
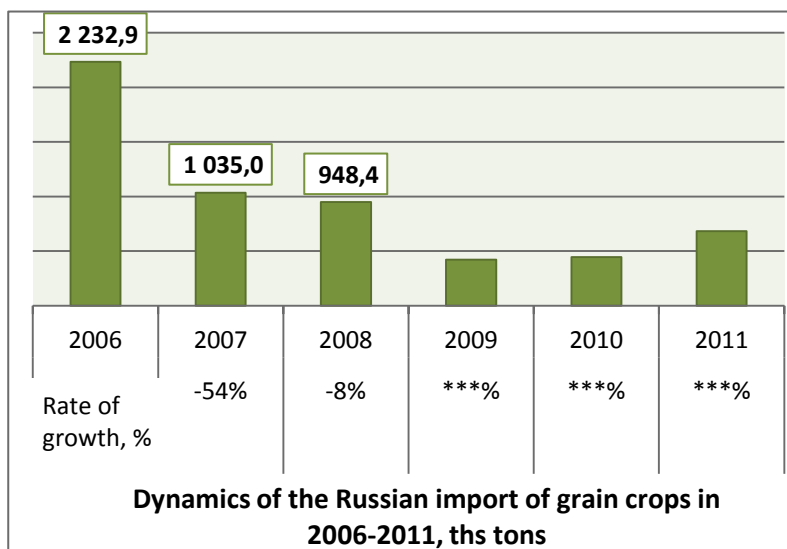
*** had *** of grain crops exported from Russia.



CHAPTER 9

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Russian import of grain crops decreased in 2006-2009 from 2 ths tons to *** ths tons and then began to increase: by ***% in 2010 and ***% in 2011 and reached *** ths tons.



In the structure of the Russian import in physical terms in 2011 *** prevailed, it had ***% of total volume, ***% belonged to *** and ***% ***, the share of other grain crops was equal to over ***%.

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