

**Intesco  
Research  
Group**

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



MOSCOW 2012

## CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	11
EXTRACTS FROM RESEARCH.....	14
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES .....	18
ABOUT INTESCO RESEARCH GROUP .....	30

## CONTENTS

### RESEARCH METHODOLOGY

#### LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

#### 1. GENERAL ECONOMIC SITUATION IN RUSSIA

##### 1.1. *Popultaion of Russia*

Number of population

The largest cities

Social standards of living dynamics

Economic activity

##### 1.2. *Economic situation*

Dynamics of economic development

Stability of the state budget

##### 1.3. *Situation of Russia in the world*

*Share of RF in world population*

#### 2. SUBJECT OF RESEARCH

2.1. Food crop

2.2. Grain crop

2.3. Forage crop

2.4. Classification

*Classification by ARCP*

*Classification by ARCPEA*

*Classification by FEA CN*

*Classification of wheat*

#### 3. WORLD MARKET OF GRAIN CROPS

3.1. The largest countries producing grain crops

*Volume of production in the largest producing countries*

*Structure of the world production by the largest countries*

3.2. The main countries importing grain crops

*Volumes of products imported to the main importing countries*

*Structure of the world import by the main countries*

3.3. The main countries exporting grain crops

*Volumes of exported goods from the main exporting countries*

*Structure of the world export by the main countries*

3.4. The largest countries consuming grain crops

*Volumes of consumption in the largest countries*

*Structure of the world consumption by the largest countries*

3.5. Trends on the world market of grain crops

#### **4. CULTIVATED AREAS OF GRAIN CROPS IN RUSSIA**

4.1. Dynamics of cultivated areas of grain crops

4.2. Structure of cultivated areas by types of grain crops

4.3. Structure of cultivated areas by categories of farms

4.4. Geography of cultivated areas of grain crops distribution by federal districts of RF

4.5. Geography of cultivated areas of grain crops distribution by regions of RF

4.6. Cultivated areas of grain maize in regions of RF

4.7. Cultivated areas of forage maize in regions of RF

#### **5. YIELD OF GRAIN CROPS IN RUSSIA**

5.1. Dynamics of grain crop yield

5.2. Yielding capacity by types of grain crops

5.3. Yielding capacity of grain crops in regions of RF

5.4. Yielding capacity of grain maize in regions of RF

5.5. Yielding capacity of silage corn, green fodder and haylage in regions of RF

#### **6. GROSS YIELD OF GRAIN CROPS IN RUSSIA**

6.1. Dynamics of gross yield of grain crops and grain legume

6.2. Structure of gross yield by types of grain crops

6.3. Structure of gross yield of grain crops by categories of farms

6.4. Structure of gross yield of grain crops by federal districts of RF

6.5. Regional structure of gross yield of grain crops

6.6. Gross yield of wheat

*Dynamics by years*

*Structure of gross yield*

*Structure of gross yield by federal districts*

*Structure of gross yield by regions*

6.7. Gross yield of barley

*Dynamics by years*

*Structure of gross yield*

*Structure of gross yield by federal districts*

*Structure of gross yield by regions*

6.8. Gross yield of grain maize

*Dynamics by years*

*Structure of gross yield*

*Structure of gross yield by federal districts*

*Structure of gross yield by regions*

## **7. BALANCE OF DEMAND AND SUPPLY OF GRAIN CROPS IN RUSSIA**

7.1. Parameters of grain crops balance in dynamics

7.2. Structure of grain crops supply

7.3. Structure of grain crops demand

## **8. ANALYSIS OF GRAIN CROPS EXPORT**

8.1. Grain crops (in general)

*Dynamics of export volume by years*

*Dynamics of export volume by months*

*Structure of export by types of grain crops*

*Dynamics of export by the largest countries of destination*

*Structure of export by countries of destination*

8.2. Wheat

*Dynamics of export volume by years*

*Structure of export by countries of destination*

8.3. Barley

*Dynamics of export volume by years*

*Structure of export by countries of destination*

8.4. Oat

*Dynamics of export volume by years*

*Structure of export by countries of destination*

8.5. Rye

*Dynamics of export volume by years*

*Structure of export by countries of destination*

8.6. Corn

*Dynamics of export volume by years*

*Structure of export by countries of destination*

8.7. Buckwheat

*Dynamics of export volume by years*

*Structure of export by countries of destination*

8.8. Millet

*Dynamics of export volume by years*

*Structure of export by countries of destination*

## **9. ANALYSIS OF GRAIN CROPS IMPORT**

9.1. Grain crops

*Dynamics of import volume by years*

*Dynamics of import volume by months*

*Structure of import by types of grain crops*

*Dynamics of import by the largest supplying countries*

*Structure of import by supplying countries*

9.2. Wheat

*Dynamics of import volume by years*

9.3. Oat

*Dynamics of import volume by years*

9.4. Corn

*Dynamics of import volume by years*

*Structure of import by supplying countries*

9.5. Rice

*Dynamics of import volume by years*

*Structure of import by supplying countries*

**10. THE LARGEST PLAYERS ON THE MARKET OF GRAIN CROPS IN RUSSIA**

10.1. «Rusagro» Group

*Reference information*

*Companies included into the group*

10.2. «Kuban» AgroHolding

10.3. Agricultural investment company «AGRIKO»

*Structure*

10.4. International Grain Company

10.5. «United Grain Company»

**11. THE LARGEST COMPANIES ON THE MARKET BY THE VOLUME OF REVENUES (2010)**

11.1. Raising of grain and grain legume crops

11.2. Storage and warehousing of grain

11.3. Wholesaling of grain

**12. FACTORS INFLUENCING THE MARKET OF GRAIN CROPS**

**13. STATE REGULATIONS OF THE MARKET OF GRAIN CROPS**

**14. PRODUCER PRICES FOR GRAIN CROPS**

14.1. Grain crops

14.2. Wheat

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

*Soft wheat*

*Soft wheat 3 grade (grocery)*

*Soft wheat 4 grade (grocery)*

*Soft wheat 5 grade (forage)*

*Soft strong wheat (1 and 2 grade)*

*Hard wheat*

14.3. Grocery barley

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.4. Forage barley

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.5. Rye grocery

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.6. Forage rye

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.7. Buckwheat

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.8. Millet

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.9. Oat

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

14.10. Corn

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

*Average producer prices by federal districts of RF*

*Average producer prices by regions of RF*

*Corn for fodder*

*Dynamics of average producer prices by years*

*Dynamics of average producer prices by months*

## **15. ACTUAL COSTS OF GRAIN CROPS FOR INDUSTRIAL ORGANIZATIONS**

### 15.1. Wheat

*Dynamics of average prices by years*

*Dynamics of average prices by months*

*Soft wheat*

*Soft wheat 3 grade*

*Soft wheat 4 grade*

*Soft wheat 5 grade*

*Strong wheat (1 and 2 grades)*

*Hard wheat (graded or not graded)*

### 15.2. Barley

*Dynamics of average prices by years*

*Dynamics of average prices by months*

### 15.3. Rye

*Dynamics of average prices by years*

*Dynamics of average prices by months*

### 15.4. Buckwheat

*Dynamics of average prices by years*

*Dynamics of average prices by months*

### 15.5. Millet

*Dynamics of average prices by years*

*Dynamics of average prices by months*

### 15.6. Corn

*In general*

*Dynamics of average prices by years*

*Dynamics of average prices by months*

*Average prices by federal districts*

*Average prices by regions of RF*

*Corn for grocery*

*Dynamics of average prices by years*

*Dynamics of average prices by months*

*Corn for fodder*

*Dynamics of average prices by years*

*Dynamics of average prices by months*

*Average prices by federal districts*

*Average prices by regions*

15.7. Oat

*Dynamics of average prices by years*

*Dynamics of average prices by months*

**16. TRENDS OF THE RUSSIAN MARKET OF GRAIN CROPS**

**17. DISTRIBUTION CHANNELS ON THE RUSSIAN MARKET OF GRAIN CROPS**

**18. PROFILES OF THE LARGEST ENTERPRISES BY GRAIN CROPS GROWING**

18.1. «AGRICULTURAL UNION «KUBAN» JSC

*Reference information*

*Types of activity*

*Subsidiaries*

*Volumes of production*

*Balance sheet*

*Cash flow statement*

*Financials*

18.2. «AGRICULTURAL COMPANY «ZOLOTAYA NIVA» LLC

*Reference information*

*Types of activity*

*Subsidiaries*

*Balance sheet*

*Cash flow statement*

*Financials*

18.3. «KOLKHOZ-PLEMZAVOD «KAZMINSKIY» SKHK

*Reference information*

*Types of activity*

*Subsidiaries*

*Volumes of production*

*Balance sheet*

*Cash flow statement*

*Financials*

18.4. «VOSTOK-ZERNOPRODUCT» JSC

*Reference information*

*Subsidiaries*

*Balance sheet*

*Cash flow statement*

*Financials*

18.5. «BELGOROD-SEMENA» LLC

*Reference information*

*Types of activity*

*Subsidiaries*

*Volumes of production*

*Balance sheet*

*Cash flow statement*

*Financials*

## **19. FORECAST OF THE RUSSIAN GRAIN CROPS MARKET DEVELOPMENT FOR 2012-2013**

19.1. Forecast of gross yielded parameters and cultivated areas of grain crops in Russia

19.2. Forecast of demand and supply balance of grain crops in Russia

### **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

BALANCE OF DEMAND AND SUPPLY OF GRAIN CROPS IN RUSSIA

ANALYSIS OF GRAIN CROPS EXPORT

ANALYSIS OF GRAIN CROPS IMPORT

THE LARGEST PLAYERS ON THE MARKET OF GRAIN CROPS IN RUSSIA

THE LARGEST COMPANIES ON THE MARKET BY THE VOLUME OF REVENUES (2010)

FACTORS, INFLUENCING THE MARKET OF GRAIN CROPS

STATE REGULATIONS OF THE MARKET OFGRIN CROPS

PRODUCER PRICES FOR GRAIN CROPS

ACTUAL COSTS OF GRAIN CROPS FOR INDUSTRIAL PRODUCERS

TRENDS ON THE RUSSIAN MARKET OF GRAIN CROPS

CHANNELS OF DISTRIBUTION ON THE RUSSIAN MARKET OF GRAIN CROPS

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

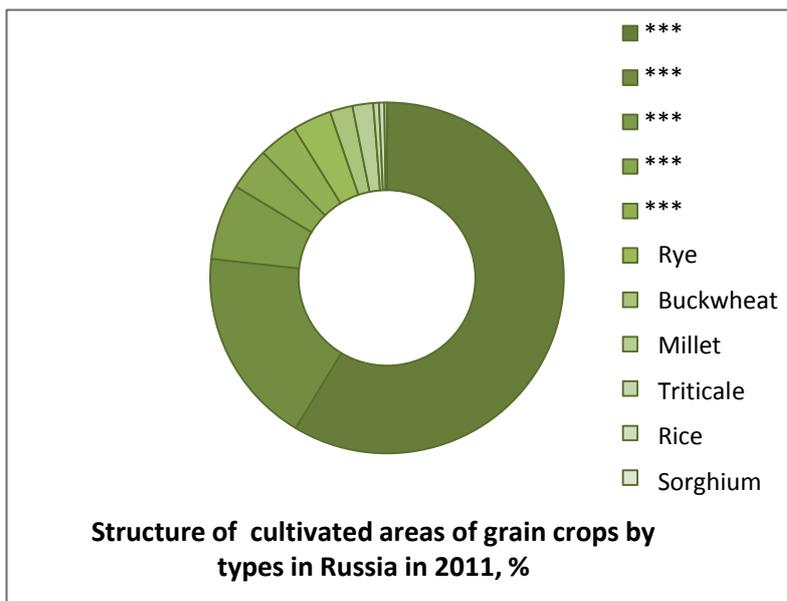
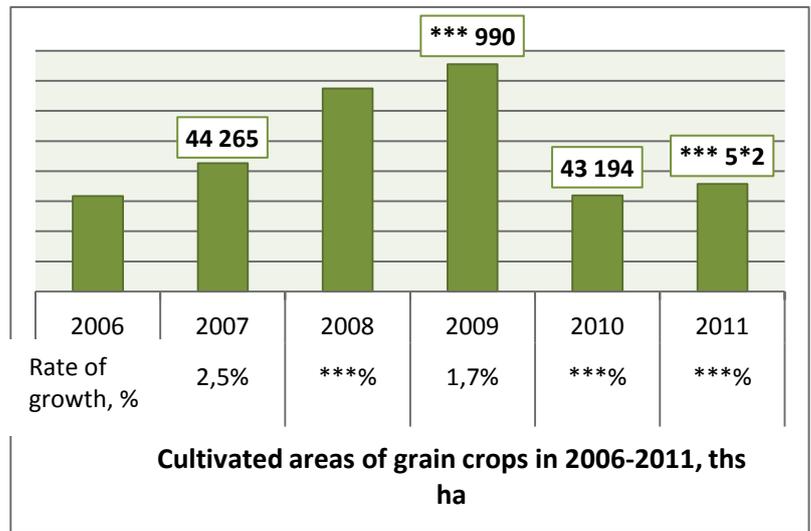
### CHAPTER 3

#### 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

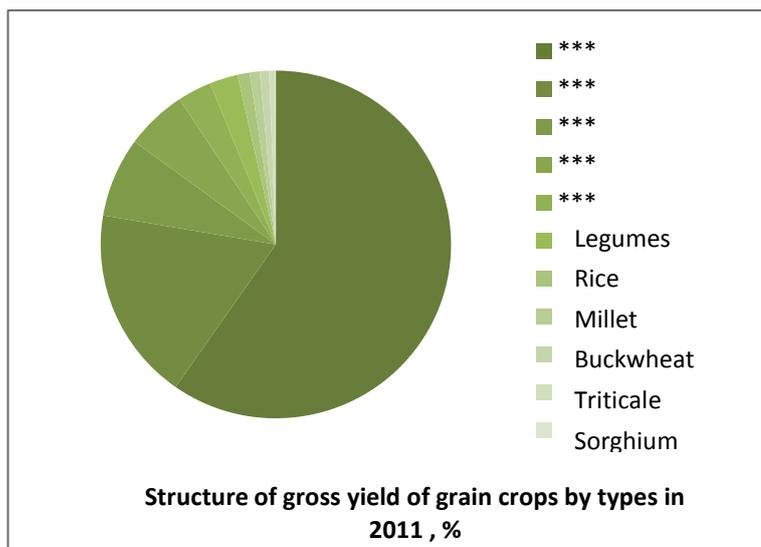
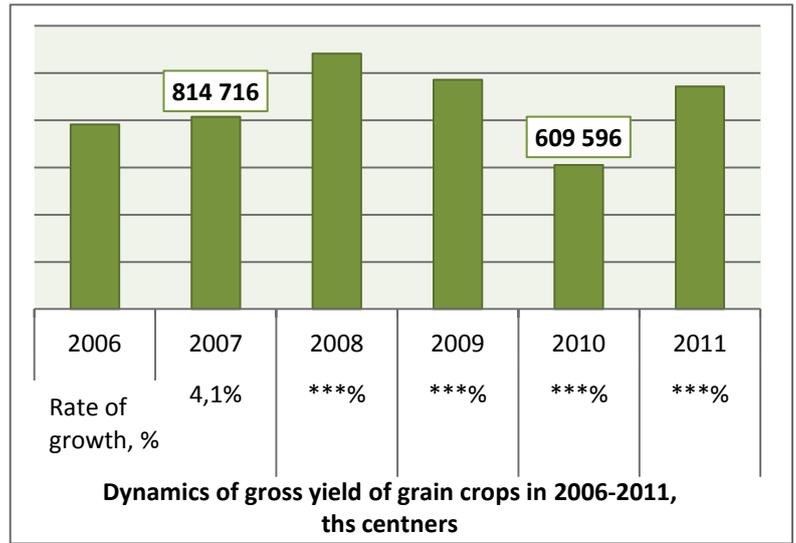


cultivated areas of grain crops in 2011 almost two thirds belonged to \*\*\*. The following wide-spread crop was \*\*\* – \*\*\*% of areas, \*\*\*% belonged to \*\*\*. Shares of corn, legumes, rye, buckwheat and millet varied from \*\*% to \*\*%. Shares of triticale, rice and sorghium amounted to \*\*%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

**CHAPTER 5**

**GROSS YIELD OF GRAIN CROPS  
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.

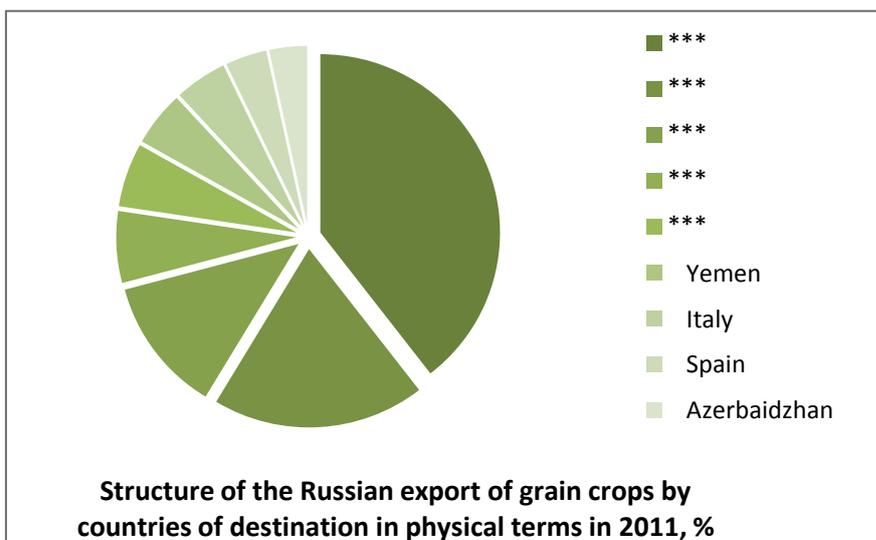
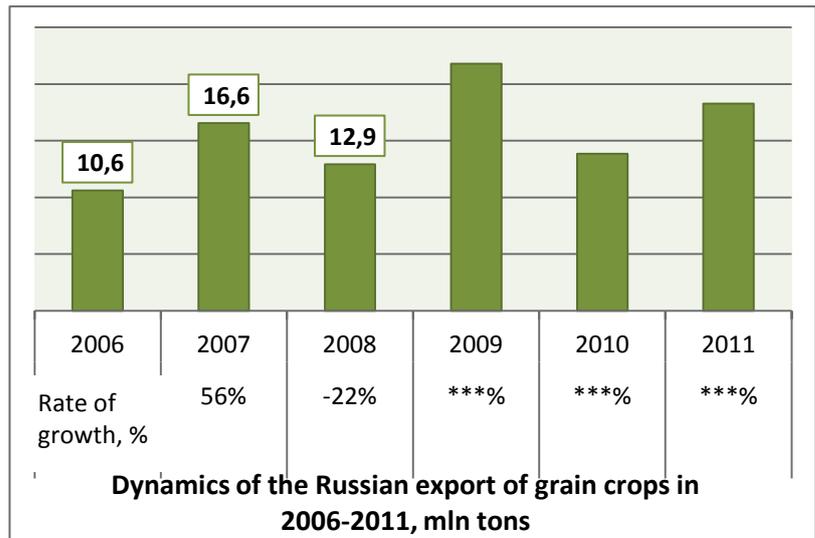
**CHAPTER 7**

**ANALYSIS OF GRAIN CROPS EXPORT**

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

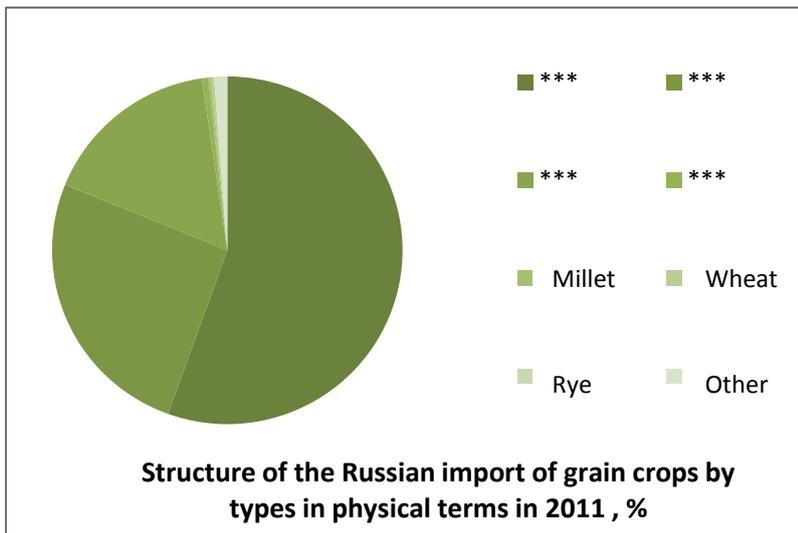
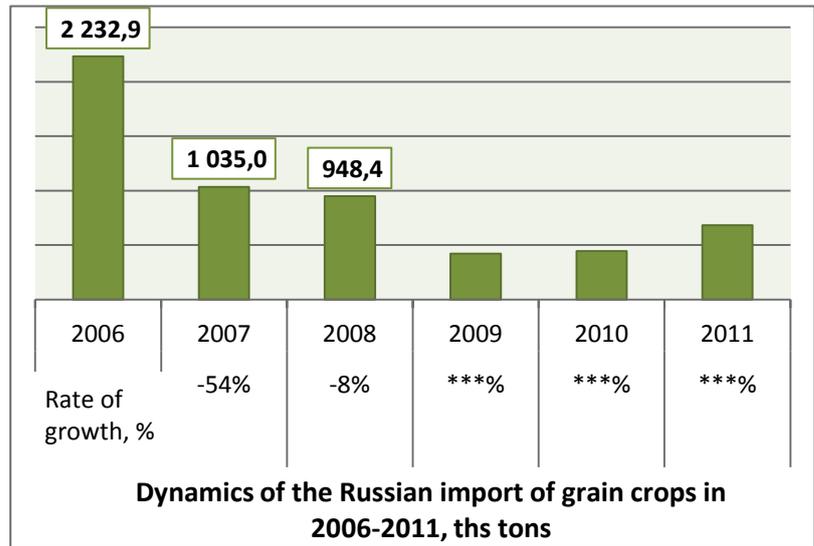
equal to \*\*%, \*\*\* – \*\*%. Shares of other countries amounted to \*\*% and less. In total 9 countries \*\*\* had \*\*\* of grain crops exported from Russia.



**CHAPTER 9**

**ANALYSIS OF GRAIN CROPS  
IMPORT**

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 \*\*\*%.

## LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

### RESEARCH METHODOLOGY

#### LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

##### 1. GENERAL ECONOMIC SITUATION IN RUSSIA

Schedule 1. Dynamics of resident population number of Russia in 2000, 2005, 2010 and forecast for 2015 and 2020, ths people

Schedule 2. Dynamics of actual household disposable income in Russia in 2000-2010, %

Schedule 3. Forecast of the ratio of demographic load dynamics in 2011-2033

Schedule 4. Dynamics of number of employed and unemployed people in RF in 2006-2010, ths people

Schedule 5. Dynamics of share of the unemployed in economically active population by FD of RF in 2006-2010, %

Schedule 6. Dynamics of GDP of RF in prices of 2008 in 2001-2011, billion rubles

Schedule 7. Investments into the fixed capital of RF in 2001-2010

Schedule 8. Surplus/deficit of consolidated budget of RF in 2006-2010, %

Schedule 9. Dynamics of total external debt of RF 2001-2010

Schedule 10. Dynamics of the Russian external debt structure by the main sectors in 2001-2010, %

Schedule 11. Consumer prices index in RF 2001-2010, %

Schedule 12. Share of RF in the population of the world in 2000-2010 and forecast until 2100

Schedule 13. Share of RF in the world GDP in 2000-2010 and forecast for 2011-2016

##### 2. SUBJECT OF RESEARCH

Rate of growth, % **MARKET OF GRAIN CROPS**

Schedule 14. The world's largest producers of grain in 2010 tons in rice equivalent

Diagram 1. Structure of the world grain crops production by types in 2010, %

Diagram 2. Structure of the world grain crops production by countries in 2010, %

Table 2. Import of grain crops by countries of the world in 2009, tons

Schedule 15. The largest importers of grain in the world in 2009, tons

Table 3. Import of grain crops by countries of the world in 2009, ths dollars.

Schedule 16. The largest importers of grain in the world in 2009, billion dollars

Diagram 3. Structure of the world grain crops import by countries in physical terms in 2009, %

Diagram 4. Structure of the world grain crops import by countries in physical terms in 2009, %

Table 4. Export of grain crops by countries of the world in 2009, tons

Schedule 17. The largest exporters of grain in the world in 2009, tons

Table 5. Export of grain crops by countries of the world in 2009, ths dollars

Schedule 18. The largest exporters of grain in the world in 2009, billion dollars

Diagram 5. Structure of the world grain crops export by countries in physical terms in 2009, %

Diagram 6. Structure of the world grain crops export by countries in physical terms in 2009, %

Table 6. Volumes of grain crops consumption in countries of the world in 2009, tons

Schedule 19. The largest consumers of grain in the world in 2009, kg/person in a year

Diagram 7. Structure of grain crops consumption by countries in 2009, %

#### **4. CULTIVATED AREAS OF GRAIN CROPS IN RUSSIA**

Schedule 20. Dynamics of cultivated areas in Russia in 2006-2011, ths ha

Schedule 21. Dynamics of cultivated areas of grain crops in Russia in 2006-2011, ths ha

Diagram 8. Structure of cultivated areas by types of crops in Russia in 2011, %

Diagram 9. Structure of cultivated areas of grain crops by types in Russia in 2011, %

Diagram 10. Change of structure of cultivated areas of grain crops by types in Russia in 2006-2011, %

Diagram 11. Structure of cultivated areas of grain crops and legumes by types of organizations in Russia in 2011, %

Diagram 12. Change of structure of cultivated areas of grain crops and legumes by types of organizations in Russia in 2006-2011, %

Table 7. Cultivated areas of grain crops and legumes in federal districts of RF in 2006-2011, ths ha

Diagram 13. Structure of cultivated areas of grain crops and legumes by federal districts of Russia in 2011, %

Diagram 14. Change of structure of cultivated areas of grain crops and legumes by federal districts of RF in 2006-2011, %

Schedule 22. The largest regions by grain crops and legumes cultivated areas in 2011, ths ha

Table 8. Cultivated areas of grain crops and legumes in regions of RF in 2006-2011, ths ha

Diagram 15. Structure of cultivated areas of grain crops and legumes by regions of Russia in 2011, %

Diagram 16. Structure of cultivated areas of corn for grain by types of organizations in Russia in 2011, %

Diagram 17. Structure of cultivated areas of corn for grain by federal districts of Russia in 2011, %

Table 9. Cultivated areas of corn for grain in regions of RF in 2010-2011, ths ha

Diagram 18. Structure of cultivated areas of corn for grain by regions of Russia in 2011, %

Diagram 19. Change of structure of cultivated areas of corn for grain by regions of RF in 2010-2011, %

Diagram 20. Structure of cultivated areas of corn for fodder by types of organizations in Russia in 2011, %

Diagram 21. Structure of cultivated areas of corn for fodder by federal districts of Russia in 2011, %

Diagram 22. Change of structure of corn for fodder by federal districts of RF in 2010-2011, %

Diagram 23. Structure of cultivated areas of corn for fodder by regions of Russia in 2011, %

Diagram 24. Change of structure of cultivated areas of corn for fodder by regions of RF in 2010-2011, %

## 5. YIELD OF GRAIN CROPS IN RUSSIA

Schedule 23. Dynamics of grain crops yield capacity in Russia in 2006-2011, c/ha

Schedule 24. Yielding capacity of grain crops by types in Russia in 2011, c/ha

Schedule 25. Yielding capacity of grain crops by regions in Russia in 2011, c/ha

Schedule 26. Dynamics of yielding capacity of grain maize in Russia in 2008-2011, c/ha

Schedule 27. Yielding capacity of corn by regions of Russia in 2011, c/ha

Table 11. Yielding capacity of corn for grain in regions of Russia in 2008-2011, c/ha

Schedule 28. Dynamics of average grain maize yielding capacity in regions of RF by years in 2008-2011, c/ha

Schedule 29. Dynamics of corn for silage, green fodder and haylage yielding capacity in Russia in 2008-2011, c/ha

Schedule 30. Yielding capacity of corn for silage, green fodder and haylage by regions of Russia in 2011, c/ha

Table 12. Yielding capacity of corn for silage, green fodder, haylage in 2008-2011, c/ha

## 6. GROSS YIELD OF GRAIN CROPS IN RUSSIA

Schedule 31. Dynamics of gross yield of grain crops and legumes in Russia in 2006-2011, ths centners

Diagram 25. Structure of gross yield of grain crops and legumes by types of grain crops in 2011, %

Diagram 26. Change of structure of gross yield of grain crops and legumes by types of grain crops in 2006-2011, %

Diagram 27. Structure of gross yield of grain crops by categories of farms in 2011, %

Table 13. Gross yield of grain crops by federal districts of RF in 2006-2011, ths centners

Diagram 28. Structure of gross yield of grain crops by federal districts in Russia in 2011, %

Table 14. Gross yield of grain crops in regions of Russia in 2010-2011, ths centners

Diagram 29. Structure of gross yield of grain crops by regions in 2011, %

Diagram 30. Change of structure of gross yield of grain crops by regions in 2010-2011, %

Schedule 32. Dynamics of gross yield of wheat in Russia in 2006-2011, ths centners

Diagram 31. Structure of gross yield of wheat by types in 2011, %

Diagram 32. Change of structure of gross yield of wheat by types in 2006-2011, %

Diagram 33. Structure of gross yield of wheat by categories of farms in 2011, %

Table 15. Gross yield of wheat by federal districts of Russia in 2006-2011, ths centners

Diagram 34. Structure of gross yield of wheat by federal districts in Russia in 2011, %

Table 16. Gross yield of wheat by regions of Russia in 2006-2011, ths centners

Diagram 35. Structure of gross yield of wheat by regions in 2011, %

Diagram 36. Change of structure of gross yield of wheat by regions in 2006-2011, %

Schedule 33. Dynamics of gross yield of barley in Russia in 2006-2011, ths centners

Diagram 37. Structure of gross yield of barley by types in 2011, %

Diagram 38. Change of structure of gross yield of barley by types in 2006-2011, %

Diagram 39. Structure of gross yield of barley by categories of farms in 2011, %

Table 17. Gross yield of barley by federal districts of Russia in 2006-2011, ths centners

Diagram 40. Structure of gross yield of barley by federal districts in Russia in 2011, %

Table 18. Gross yield of barley by regions of Russia in 2006-2011, ths centners

Diagram 41. Structure of gross yield of barley by regions in 2011, %

Diagram 42. Change of structure of gross yield of barley by regions in 2006-2011, %

Schedule 34. Dynamics of gross yield of corn in Russia in 2006-2011, ths tons

Diagram 43. Structure of gross yield of corn for grain by categories of farms in 2011, %

Table 19. Gross yield of grain maize by federal districts of Russia in 2010-2011, ths centners

Diagram 44. Structure of gross yield of corn for grain by districts of Russia in 2011, %

Table 20. Gross yield of grain maize by regions of Russia in 2010-2011, ths centners

Diagram 45. Structure of gross yield of corn for grain by regions in 2011, %

Diagram 46. Change of structure of gross yield of corn for grain by regions in 2010-2011, %

## **7. BALANCE OF DEMAND AND SUPPLY OF GRAIN CROPS IN RUSSIA**

Table 21. Parameters of balance of grain crops in 2006- 1 qtr. 2012, mln tons

Schedule 35. Dynamics of grain inventory for the beginning of the year in 2006-2012, mln tons

Schedule 36. Dynamics of grain supply in 2006-2011, mln tons

Diagram 47. Structure of grain supply in 2011, %

Schedule 37. Dynamics of demand for grain in 2006-2011, mln tons

Diagram 48. Structure of demand for grain in 2011, %

Diagram 49. Structure of industrial consumption of grain 2011, %

## **8. ANALYSIS OF GRAIN CROPS EXPORT**

Schedule 38. Dynamics of the Russian grain crops export in 2006-2011, mln tons

Schedule 39. Dynamics of the Russian grain crops export by years in 2006-2011, billion dollars

Schedule 40. Dynamics of the Russian grain crops export by months in 2006 - Apr. 2012 , tons

Schedule 41. Dynamics of the Russian grain crops export by months in 2006 - Apr. 2012 , ths dollars.

Diagram 50. Structure of the Russian grain crops export in physical terms in 2011, %

Diagram 51. Structure of the Russian grain crops export in cost terms in 2011, %

Table 22. Volumes of the Russian grain crops export by countries of destination in 2006-2011 , tons

Table 23. Volumes of the Russian grain crops export by countries of destination in 2006-2011 , ths dollars.

Diagram 52. Structure of the Russian grain crops export by countries in physical terms in 2011, %

Diagram 53. Structure of the Russian grain crops export by countries in cost terms 2011, %

Schedule 42. Dynamics of the Russian export of wheat and meslin in 2006-2011, mln tons

Schedule 43. Dynamics of the Russian export of wheat and meslin in 2006-2011, mln dollars

Diagram 54. Structure of the Russian export of wheat and meslin by countries of destination in physical terms in 2011, %

Diagram 55. Structure of the Russian export of wheat and meslin by countries of destination in cost terms in 2011, %

Schedule 44. Dynamics of the Russian export of barley by years in 2006-2011, ths tons

Schedule 45. Dynamics of the Russian export of barley by years in 2006-2011, mln dollars

Diagram 56. Structure of the Russian export of wheat and meslin by countries in physical terms in 2011, %

Diagram 57. Structure of the Russian export of wheat and meslin by countries of destination in cost terms in 2011, %

Schedule 46. Dynamics of the Russian export of oat by years in 2006-2011 , tons

Schedule 47. Dynamics of the Russian export of oat by years in 2006-2011 , ths dollars.

Diagram 58. Structure of the Russian export of oat by countries in physical terms in 2011, %

Diagram 59. Structure of the Russian export of oat by countries of destination in cost terms in 2011, %

Schedule 48. Dynamics of the Russian export of rye in 2006-2011, ths tons

Schedule 49. Dynamics of the Russian export of rye by years in 2006-2011 , ths dollars.

Diagram 60. Structure of the Russian export of rye by countries in physical terms in 2011, %

Diagram 61. Structure of the Russian export of rye by countries of destination in cost terms in 2011, %

Schedule 50. Dynamics of the Russian export of corn in 2006-2011, ths tons

Schedule 51. Dynamics of the Russian export of corn in 2006-2011, mln dollars

Table 24. Volumes of the Russian export of corn by countries of destination in 2006-2011, tons

Diagram 62. Structure of the Russian export of corn by countries in physical terms in 2011, %

Table 25. Volumes of the Russian export of corn by countries of destination in 2006-2011 , ths dollars.

Diagram 63. Structure of the Russian export of corn by countries of destination in cost terms in 2011, %

Schedule 52. Dynamics of the Russian export of buckwheat in 2006-2011, ths tons

Schedule 53. Dynamics of the Russian export of buckwheat in 2006-2011 , ths dollars.

Diagram 64. Structure of the Russian export of buckwheat by countries in physical terms in 2011, %

Diagram 65. Structure of the Russian export of buckwheat by countries of destination in cost terms in 2011, %

Schedule 54. Dynamics of the Russian export of millet in 2006-2011, ths tons

Schedule 55. Dynamics of the Russian export of millet by years in 2006-2011, mln dollars

Diagram 66. Structure of the Russian export of millet by countries in physical terms in 2011, %

Diagram 67. Structure of the Russian export of millet by countries of destination in cost terms in 2011, %

## 9. ANALYSIS OF GRAIN CROPS IMPORT

Schedule 56. Dynamics of the Russian import of grain crops by years in 2006-2011, ths tons

Schedule 57. Dynamics of the Russian import of grain crops by years in 2006-2011, mln dollars

Schedule 58. Dynamics of the Russian import of grain crops by months in 2006 - Apr. 2012, tons

Schedule 59. Dynamics of the Russian import of grain crops by months in 2006 - Apr. 2012, ths dollars.

Diagram 68. Structure of the Russian grain crops export in physical terms by types in 2011, %

Diagram 69. Structure of the Russian grain crops import in cost terms by types in 2011, %

Table 26. Volumes of the Russian grain crops import by countries of origin in 2006-2011, tons

Table 27. Volumes of the Russian grain crops import by countries of destination in 2006-2011, ths dollars.

Diagram 70. Structure of the Russian import of grain crops in physical terms by supplying in 2011, %

Diagram 71. Structure of the Russian import of grain crops in cost terms by supplying countries in 2011, %

Schedule 60. Dynamics of the Russian import of wheat and meslin in 2006-2011, ths tons

Schedule 61. Dynamics of the Russian import of wheat and meslin in 2006-2011, mln dollars

Schedule 62. Dynamics of the Russian import of oat by years in 2006-2011, tons

Schedule 63. Dynamics of the Russian import of oat by years in 2006-2011, ths dollars.

Schedule 64. Dynamics of the Russian export of corn by years in 2006-2011, ths tons

Schedule 65. Dynamics of the Russian import of corn by years in 2006-2011, ths dollars.

Diagram 72. Structure of the Russian import of corn in physical terms by supplying countries in 2011, %

Diagram 73. Structure of the Russian import of corn in cost terms by supplying countries in 2011, %

Schedule 66. Dynamics of the Russian rice import by years in 2006-2011, ths tons

Schedule 67. Dynamics of the Russian rice import by years in 2006-2011, mln dollars

Diagram 74. Structure of the Russian rice import in physical terms by supplying countries in 2011, %

Diagram 75. Structure of the Russian rice import in cost terms by supplying countries in 2011, %

## **10. THE LARGEST PLAYERS ON THE MARKET OF GRAIN CROPS IN RUSSIA**

## **11. THE LARGEST COMPANIES ON THE MARKET BY THE VOLUME OF REVENUES (2010)**

Table 28. Volume of proceeds of the largest companies on grain crops and legumes growing in 2010, mln rubles

Table 29. Volume of proceeds of the largest companies on storage and warehousing of grain in 2010, mln rubles

Table 30. Volume of proceeds of the largest companies on wholesaling of grain in 2010, mln rubles

## **12. FACTORS INFLUENCING THE MARKET OF GRAIN CROPS**

## **13. STATE REGULATIONS OF THE MARKET OF GRAIN CROPS**

## **14. PRODUCER PRICES FOR GRAIN CROPS**

Schedule 68. Dynamics of average producer prices for grain crops by years in RF in 2006-2011, rub/ton

Table 31. Dynamics of average producer prices for grain crops by months in RF in 2007 – March 2012, rub/ton

Schedule 69. Dynamics of average producer prices for wheat in general by years in RF in 2006-2011, rub/ton

Schedule 70. Prices for wheat of various types in 2011, rub/ton

Schedule 71. Dynamics of average prices for wheat in general by years in RF in 2006-2012, rub/ton

Schedule 72. Dynamics of average producer prices for soft wheat by years in RF in 2006-2011, rub/ton

Schedule 73. Dynamics of average producer prices for soft wheat by months in RF in 2007 - May 2012, rub/ton

Schedule 74. Dynamics of average producer prices for wheat 3 grade by years in RF in 2009-2011, rub/ton

Schedule 75. Dynamics of average producer prices for wheat 3 grade by months in RF in 2009-May 2012, rub/ton

Schedule 76. Dynamics of average prices for wheat 4 grade by years in RF in 2009-2011, rub/ton

Schedule 77. Dynamics of average producer prices for wheat 4 grade by months in RF in 2009 - May 2012, rub/ton

- Schedule 78. Dynamics of average prices for wheat 5 grade by years in RF in 2009-2011, rub/ton
- Schedule 79. Dynamics of average producer prices for wheat 5 grade by months in RF in 2009 - May 2012, rub/ton
- Schedule 80. Dynamics of average producer prices for hard wheat by years in RF in 2006-2011, rub/ton
- Schedule 81. Dynamics of average producer prices for hard wheat by months in RF in 2006 - May 2012, rub/ton
- Schedule 82. Dynamics of average producer prices for hard wheat by years in RF in 2006-2011, rub/ton
- Schedule 83. Dynamics of average producer prices for hard wheat by months in RF in 2006 - May 2012, rub/ton
- Schedule 84. Prices for grain crops in 2011, rub/ton
- Schedule 85. Dynamics of average producer prices for grocery barley by years in RF in 2009-2011, rub/ton
- Schedule 86. Dynamics of average producer prices for grocery barley by months in RF in 2006 - May 2012, rub/ton
- Schedule 87. Dynamics of average producer prices for forage barley by years in RF in 2009-2011, rub/ton
- Schedule 88. Dynamics of average producer prices for forage barley by months in RF in 2009 - May 2012, rub/ton
- Schedule 89. Dynamics of average producer prices for grocery rye by years in RF in 2009-2011, rub/ton
- Schedule 90. Dynamics of average producer prices for grocery rye by months in RF in 2009 – May 2012, rub/ton
- Schedule 91. Dynamics of average producer prices for forage rye by years in RF in 2009-2011, rub/ton
- Schedule 92. Dynamics of average producer prices for forage rye by months in RF in 2009- May 2012, rub/ton
- Schedule 93. Dynamics of average producer prices for buckwheat by years in RF in 2006-2011, rub/ton
- Schedule 94. Dynamics of average producer prices for buckwheat by months in RF in 2006 - Apr. 2012, rub/ton
- Schedule 95. Dynamics of average producer prices for millet by years in RF in 2006-2011, rub/ton
- Schedule 96. Dynamics of average producer prices for millet by months in RF in 2006 – May 2012, rub/ton

Schedule 97. Dynamics of average producer prices for oat by years in RF in 2006-2011, rub/ton

Schedule 98. Dynamics of average producer prices for oat by months in RF in 2006 - May 2012, rub/ton

Schedule 99. Dynamics of average producer prices for corn in RF in 2006-2011, rub/ton

Schedule 100. Dynamics of average producer prices for corn by months in RF in 2006 - May 2012, rub/ton

Table 32. Average producer prices for corn by federal districts of RF in 2006-2011, rub/ton

Table 33. Average producer prices for corn by regions of RF in 2006-2011, rub/ton

Schedule 101. Average producer prices for fodder corn in 2011 -April 2012, rub/ton

Table 34. Dynamics of average producer prices for fodder corn in 2011-2012, rub/ton

## 15. ACTUAL COSTS OF GRAIN CROPS FOR INDUSTRIAL ORGANIZATIONS

Schedule 102. Dynamics of average prices for wheat in general by years in RF in 2007-2011, rub/ton

Schedule 103. Dynamics of average prices for wheat in general by months in RF in 2006 - Apr. 2012, rub/ton

Schedule 104. Dynamics of average prices for soft wheat by years in RF in 2009-2011, rub/ton

Schedule 105. Dynamics of average prices for soft wheat by months in RF in 2009- Apr. 2012, rub/ton

Schedule 106. Dynamics of average prices for wheat 3 grade by years in RF in 2009-2011, rub/ton

Schedule 107. Dynamics of average prices for wheat 3 grade by months in RF in 2009- Apr. 2012, rub/ton

Schedule 108. Dynamics of average prices for wheat 4 grade by years in RF in 2009-2011, rub/ton

Schedule 109. Dynamics of average prices for wheat 4 grade by months in RF in 2009- Apr. 2012, rub/ton

Schedule 110. Dynamics of average prices for wheat 5 grade by years in RF in 2009-2011, rub/ton

Schedule 111. Dynamics of average prices for wheat 5 grade by months in RF in 2009- Apr. 2012, rub/ton

Schedule 112. Dynamics of average prices for strong wheat by years in RF in 2009-2011, rub/ton

Schedule 113. Dynamics of average prices for strong wheat by months in RF in 2009- Apr. 2012, rub/ton

Schedule 114. Dynamics of average prices for hard wheat by years in RF in 2009-2011, rub/ton

Schedule 115. Dynamics of average prices for hard wheat by months in RF in 2009- Apr. 2012, rub/ton

Schedule 116. Dynamics of average prices for barley by years in RF in 2007-2011, rub/ton

Schedule 117. Dynamics of average prices for barley by months in RF in 2006 - March 2012, rub/ton

Schedule 118. Dynamics of average prices for rye by years in RF in 2007-2011, rub/ton

Schedule 119. Dynamics of average prices for rye by months in RF in 2006 - Apr. 2012, rub/ton

Schedule 120. Dynamics of average prices for buckwheat by years in RF in 2007-2011, rub/ton

Schedule 121. Dynamics of average prices for buckwheat by months in RF in 2006 - Apr. 2012, rub/ton

Schedule 122. Dynamics of average prices for millet by years in RF in 2007-2011, rub/ton

Schedule 123. Dynamics of average prices for millet by months in RF in 2006 - Apr. 2012, rub/ton

Schedule 124. Dynamics of average prices for corn by years in RF in 2007-2011, rub/ton

Schedule 125. Dynamics of average prices for corn by months in RF in 2006- March 2012, rub/ton

Table 35. Average actual prices for corn for industrial organizations by federal districts in 2006-2011, rub/ton

Table 36. Average actual prices for corn for industrial organizations by regions of RF in 2007 - 2011, rub/ton

Table 37. Average actual prices for grocery corn for industrial organizations by months in 2006 – March 2012, rub/ton

Schedule 127. Dynamics of average actual prices for fodder corn by years in 2006-2011, rub/ton

Schedule 128. Dynamics of average actual prices for fodder corn in 2006 - March 2012, rub/ton

Table 38. Average actual prices for grocery corn for industrial organizations by federal districts in 2006-2011, rub/ton

Table 39. Average actual prices for grocery corn for industrial organizations by regions of RF in 2006-2011, rub/ton

Schedule 129. Dynamics of average prices for oat by years in RF in 2007-2011, rub/ton

Schedule 130. Dynamics of average prices for oat by months in RF in 2006 - Apr. 2012, rub/ton

## **16. TRENDS OF THE RUSSIAN MARKET OF GRAIN CROPS**

## **17. DISTRIBUTION CHANNELS ON THE RUSSIAN MARKET OF GRAIN CROPS**

## **18. PROFILES OF THE LARGEST ENTERPRISES BY GRAIN CROPS RAISING**

Table 40. Volumes of production of «AFRICULTURAL UNION «KUBAN» JSC

Table 41. Balance sheet of «AFRICULTURAL UNION «KUBAN» JSC

Table 42. Cash flow statement of «AFRICULTURAL UNION «KUBAN» JSC

Table 43. Financials of «AFRICULTURAL UNION «KUBAN» JSC

Table 44. Balance sheet of «AGRICULTURAL COMPANY «ZOLOTAYA NIVA» LLC

Table 45. Cash flow statement of «AGRICULTURAL COMPANY «ZOLOTAYA NIVA» LLC

Table 46. Financials of «AGRICULTURAL COMPANY «ZOLOTAYA NIVA» LLC

Table 47. Volumes of production of «KOLKHOZ-PLEMZAVOD «KAZMINSKIY» SKHK

Table 48. Balance sheet of «KOLKHOZ-PLEMZAVOD «KAZMINSKIY» SKHK

Table 49. Cash flow statement of «KOLKHOZ-PLEMZAVOD «KAZMINSKIY» SKHK

Table 50. Financials of «KOLKHOZ-PLEMZAVOD «KAZMINSKIY» SKHK

Table 51. Balance sheet of «Vostok-Zernoprodukt» JSC

Table 52. Cash flow statement of «Vostok-Zernoprodukt» JSC

Table 53. Financials of «Vostok-Zernoprodukt» JSC

Table 54. Volumes of production of «BELGOROD-SEMENA» LLC

Table 55. Balance sheet of «BELGOROD-SEMENA» LLC

Table 56. Cash flow statement of «BELGOROD-SEMENA» LLC

Table 57. Financials of «BELGOROD-SEMENA» LLC

## **19. FORECAST OF THE RUSSIAN GRAIN CROPS MARKET DEVELOPMENT FOR 2012-2013.**

Schedule 131. Gross yield of grain crops in 2006-2011 and forecast for 2012/13-2015\*, mln tons

Schedule 132. Dynamics of cultivated areas under grain crops in 2006-2012 and forecast for 2013-2015\*, mln ha

Table 58. Balance of demand and supply of grain crops in Russia in 2006-2011 and forecast for 2012\*, mln tons

## **ABOUT INTESCO RESEARCH GROUP**

## ABOUT INTESCO RESEARCH GROUP

**INTESCO RESEARCH GROUP** is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

**E-mail:** [info@i-plan.ru](mailto:info@i-plan.ru)

**Web-site:** [www.i-plan.ru](http://www.i-plan.ru)

**Tel.: +7 (495) 645-97-22**