



RUSSIAN GRAIN QUALITY AND EXPORT PROSPECTS

FSI CENTRE OF GRAIN QUALITY ASSURANCE / ROSSELKHOZNADZOR



IAOM
EURASIA REGION
CONFERENCE & EXPO

19-22 MAY 2022

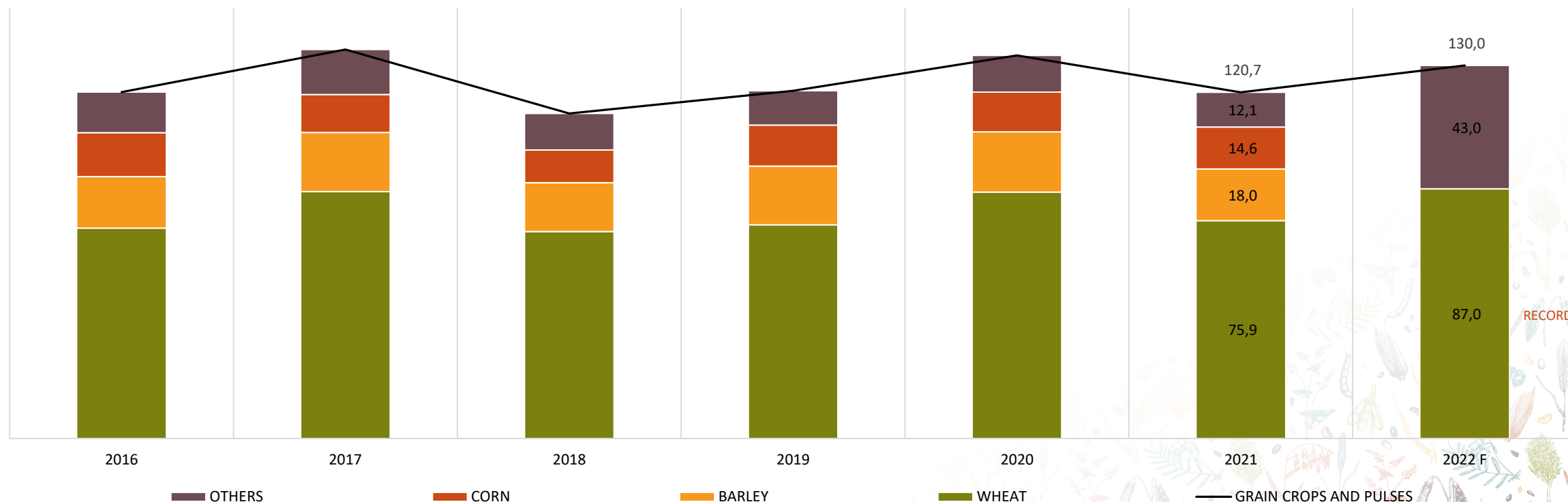
GRAIN PRODUCTION IN RUSSIAN FEDERATION

PRODUCTION FORECAST FOR 2022/23 - 130 MILLION TONS, INCL. WHEAT - 87 MILLION TONS



THE FEDERAL STATE INSTITUTION FEDERAL CENTRE OF GRAIN AND GRAIN PRODUCTS SAFETY AND QUALITY ASSURANCE is subordinate to the Federal Service for Veterinary and Phytosanitary Surveillance (Rosselkhoznadzor) and operates as a methodological centre, testing laboratory, certification body in the system of certification of food products, food raw materials and feeding stuffs.

GROSS YIELD, MLN TONS



According to FSI Federal Centre of Grain Quality Assurance, Rosstat

SOFT MILLING WHEAT* GROSS YIELD EQUIVALENT, MILLION TONS

THE GROSS HARVEST OF WHEAT IN 2021 AMOUNTED TO 75 MILLION TONS

47,2 mln t 62 % 51 regions

46,8% 3rd Grade ↑ 40,2% 4th Grade ↓ 12,9% 5th Grade ↓

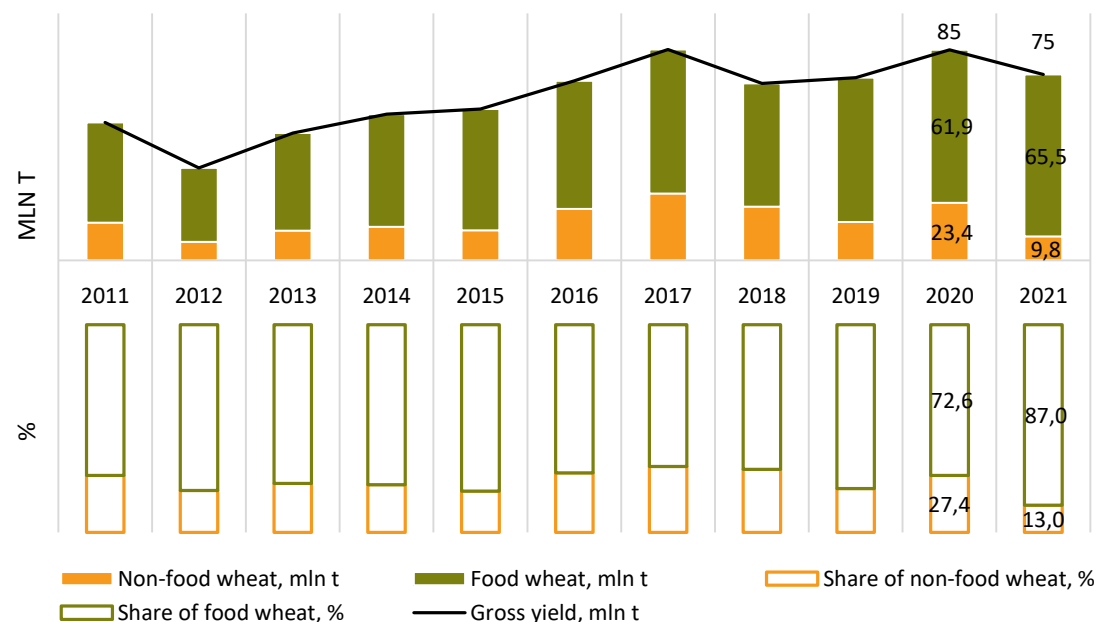


EXAMINED

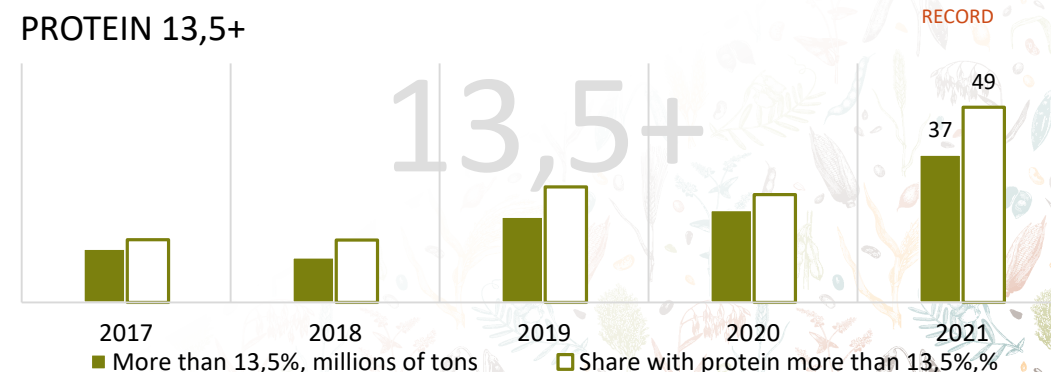
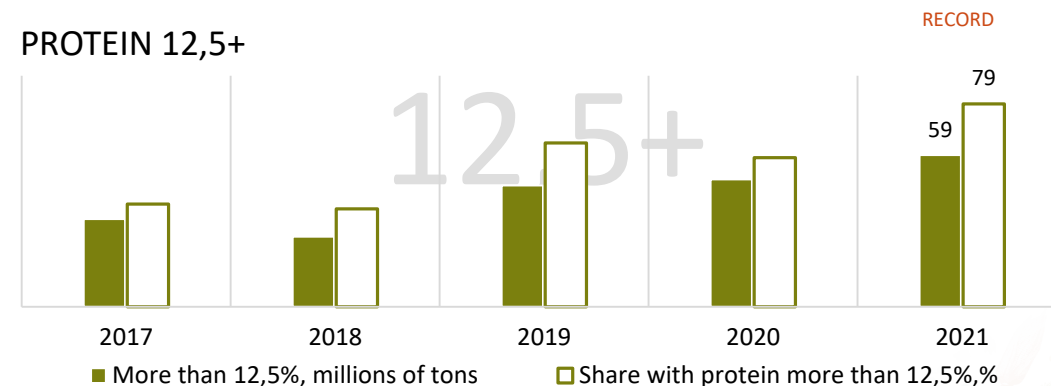
DETERMINED

SOFT WHEAT GROSS YIELD EQUIVALENT, MILLION TONS

RECORD SOFT MILLING WHEAT YIELD OF 65,5 MILLION TONS



SOFT WHEAT GROSS YIELD EQUIVALENT, MILLION TONS PROTEIN

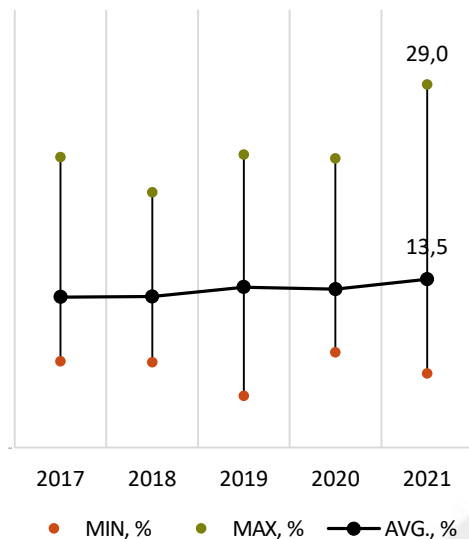


* Soft milling wheat: Protein content min 10%, Gluten amount min 18%, Falling number min 80 sec, Test weight min 710 g/l

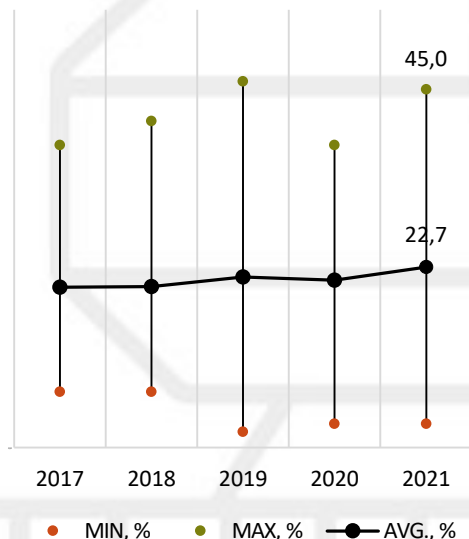
According to FSI Federal Centre of Grain Quality Assurance

MAIN QUALITY INDICATORS OF RUSSIAN WHEAT

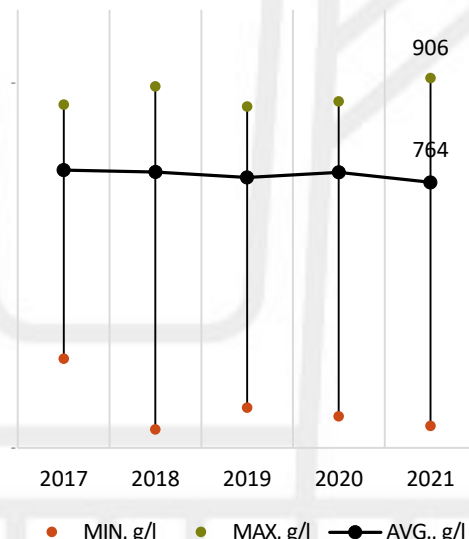
13,5 ↑
PROTEIN, %



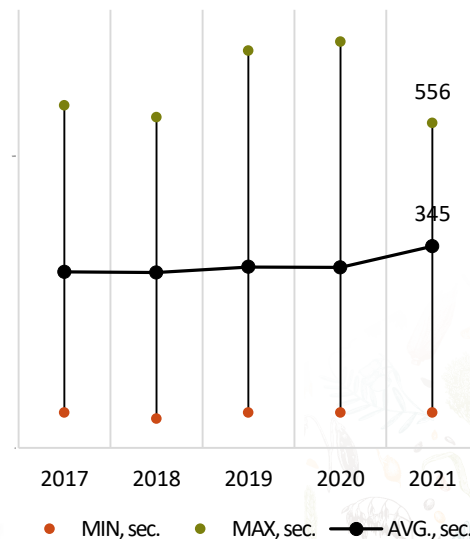
22,7 ↑
GLUTEN, %



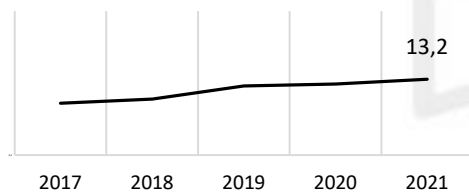
764 ↓
TEST WEIGHT, G/L



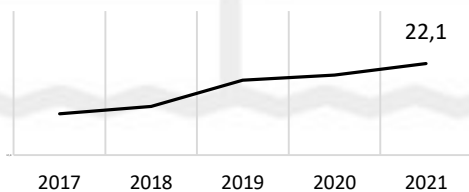
345 ↑
FALLING NUMBER, SEC



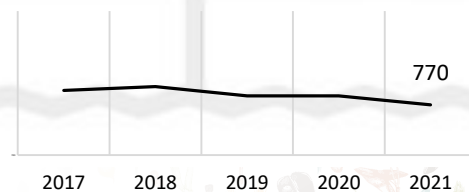
SOUTHERN FD – 13,2 ↑



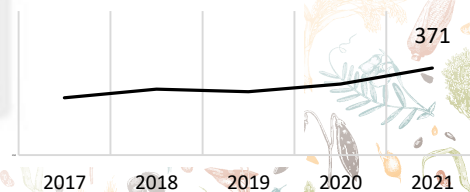
SOUTHERN FD – 22,1 ↑



SOUTHERN FD – 770 ↓

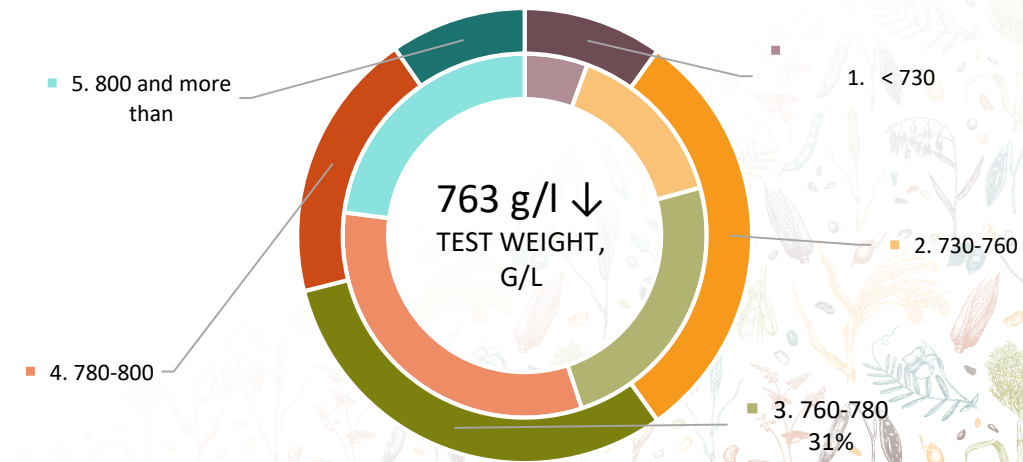
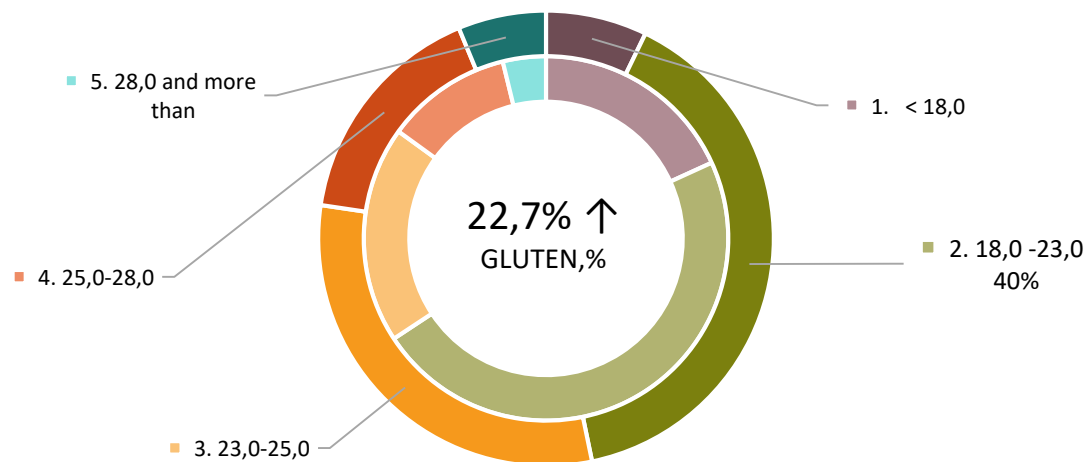
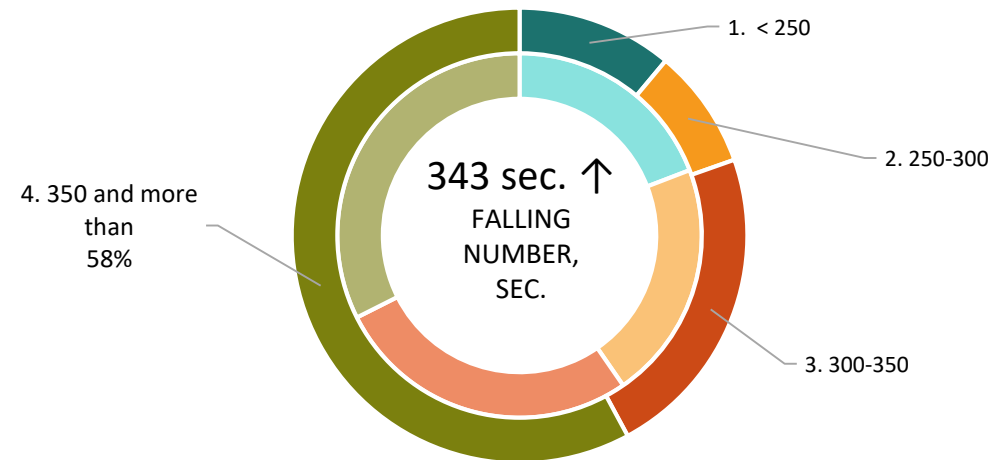
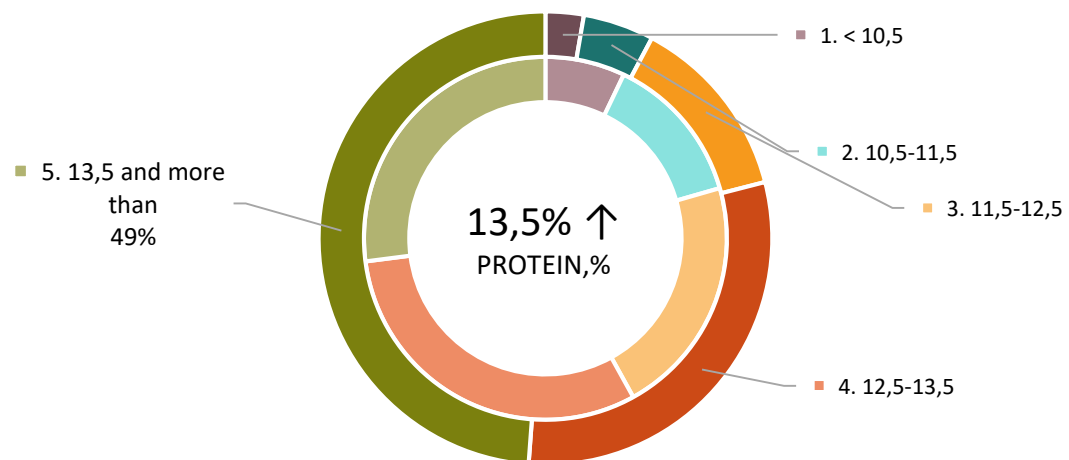


SOUTHERN FD – 371 ↑



THE SOUTHERN REGION IS TURKEY'S MAIN SHIPPING REGION

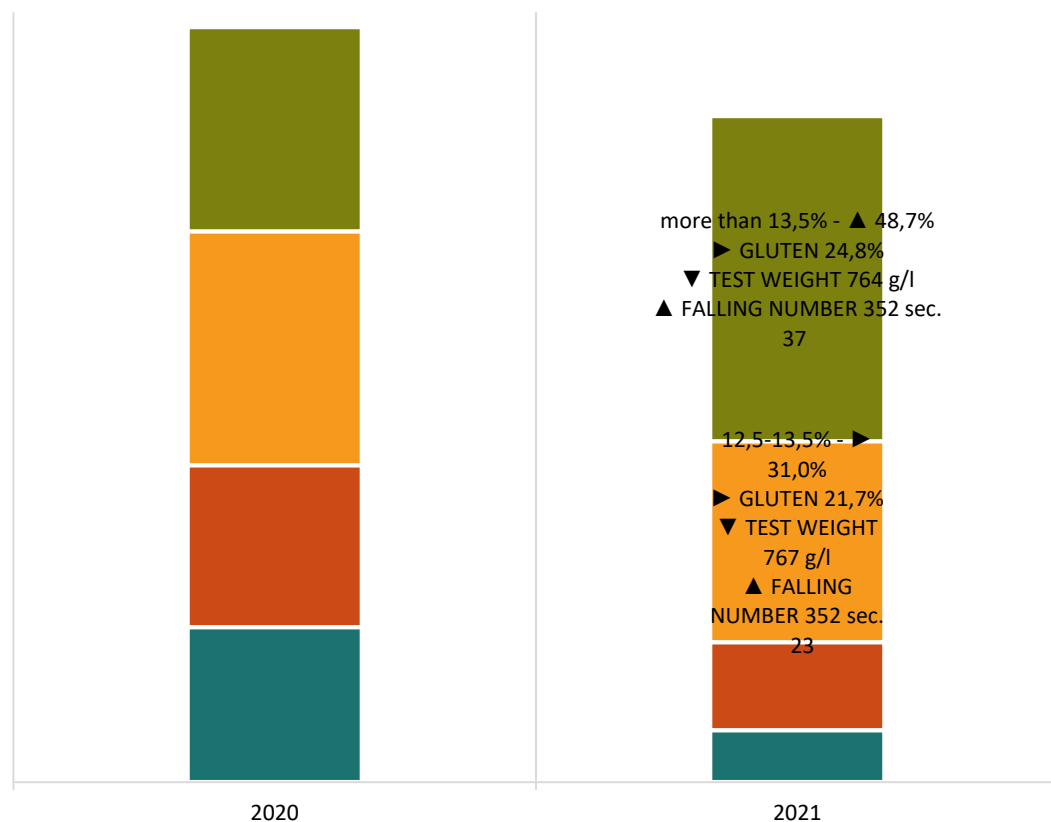
MAIN PARAMETERS OF QUALITY OF SOFT WHEAT IN 2021 HARVEST



MONITORING OF 2021 SOFT WHEAT HARVEST

EXAMINED 47,2 MLN T OR 62% IN 51 REGIONS

HARVEST BY PROTEIN AND PARAMETERS, MLN TONS



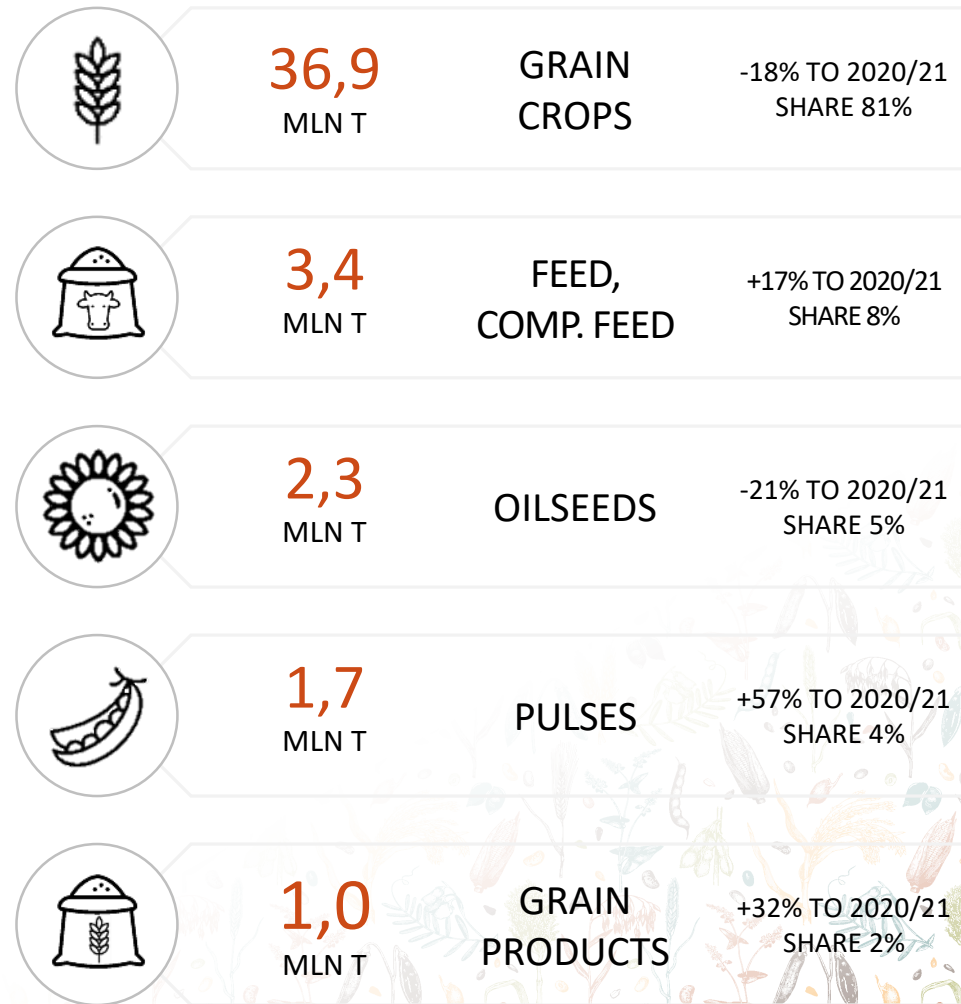
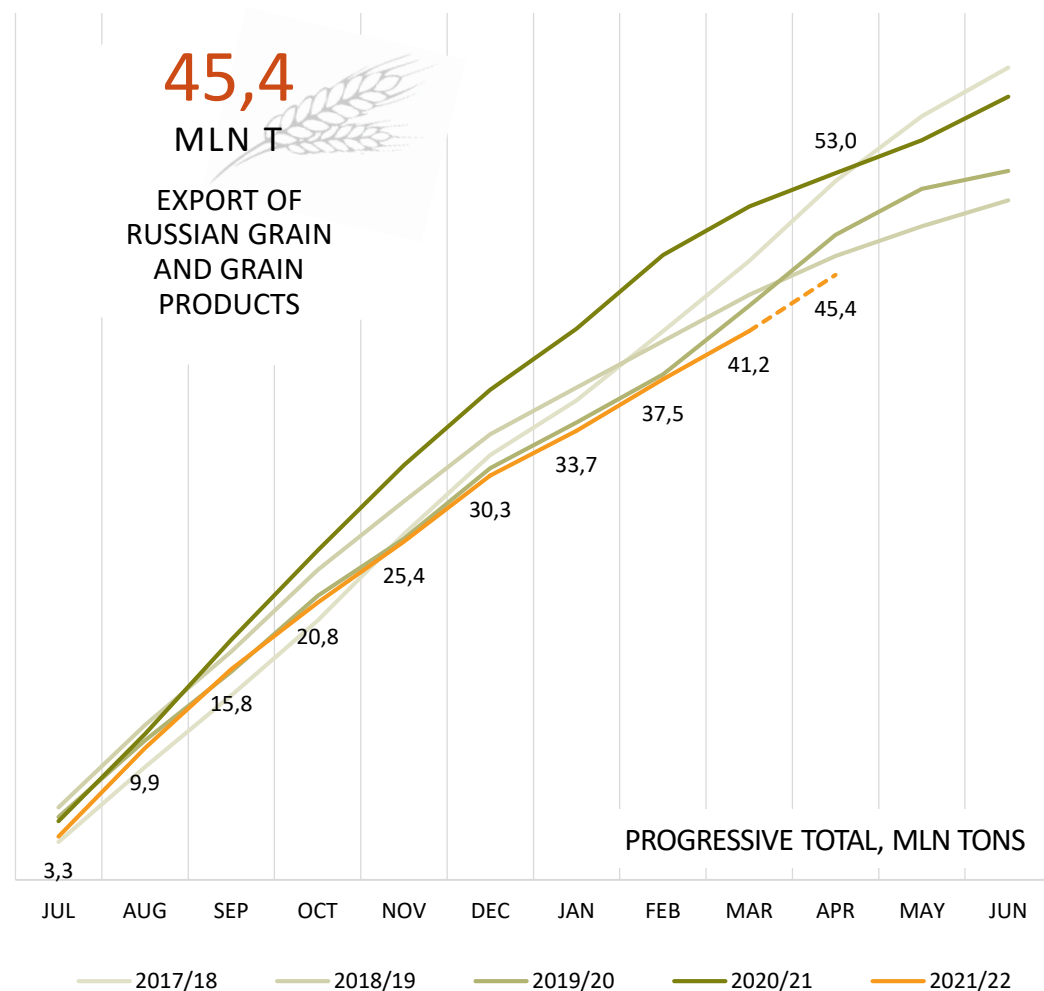
HARVEST DISTRIBUTION BY PROTEIN AND REGIONS



According to FSI Federal Centre of Grain Quality Assurance

EXPORTS OF RUSSIAN GRAIN AND GRAIN PRODUCTS IN 2021/22

2021/22 (10 M): 45,4 MLN TONS (-14% TO 2020/21), INCLUDING GRAIN CROPS – 36,9 MLN TONS (-18%)



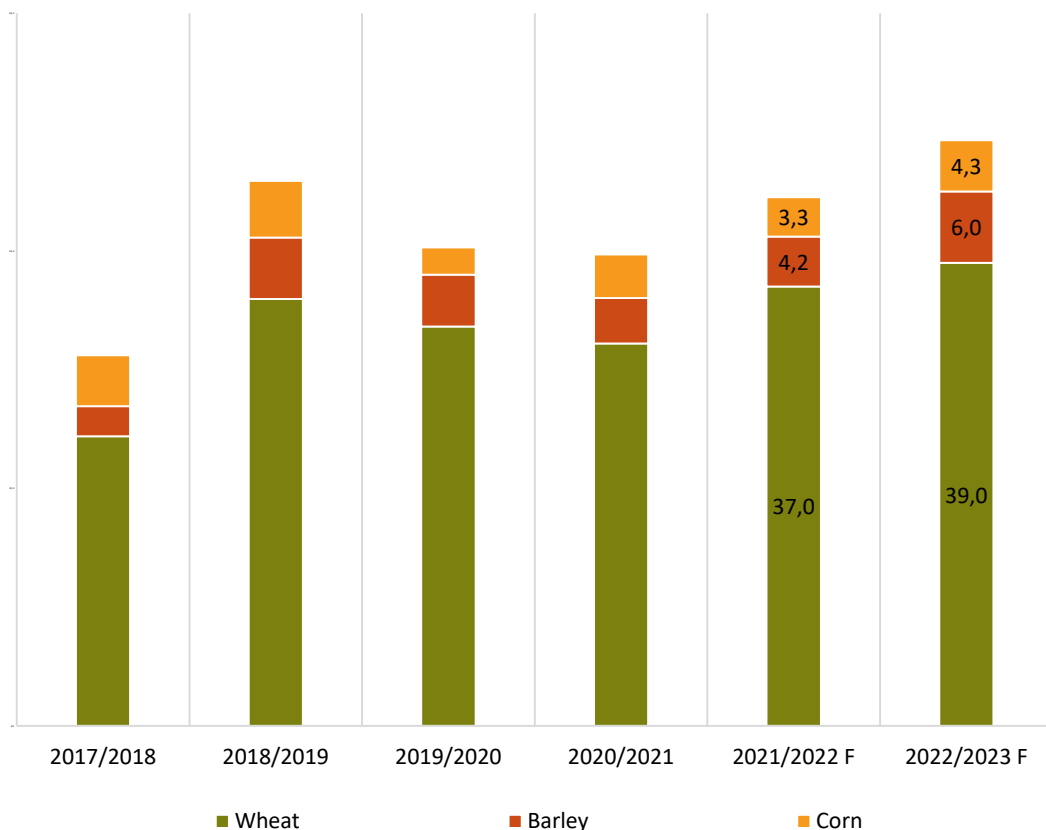
Export under phytosanitary certificates issued by Rosselkhoznadzor

2021/22 STAPLE GRAIN CROPS EXPORT FORECAST

THE FORECAST OF THE RUSSIAN MINISTRY OF AGRICULTURE FOR GRAIN EXPORTS THIS YEAR IS 45 MILLION TONS

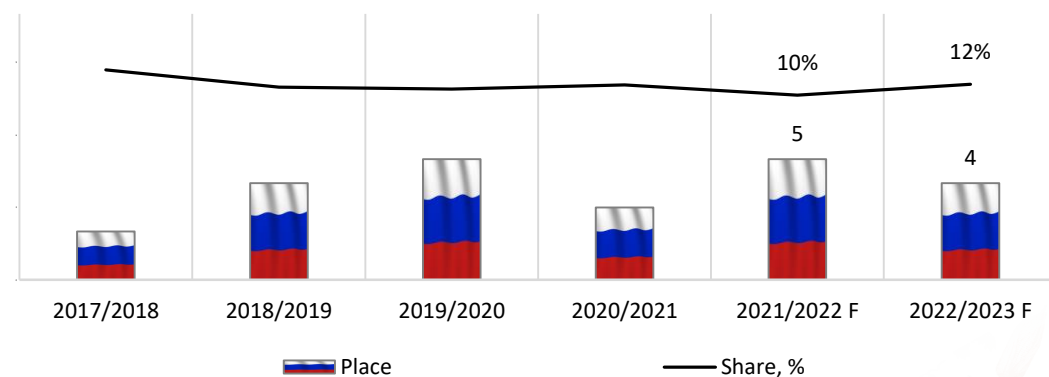
THE FORECAST OF RUSSIAN GRAIN EXPORTS

WHEAT, BARLEY, CORN



RUSSIA'S PLACE AND SHARE IN THE WORLD EXPORTS

WHEAT, BARLEY, CORN



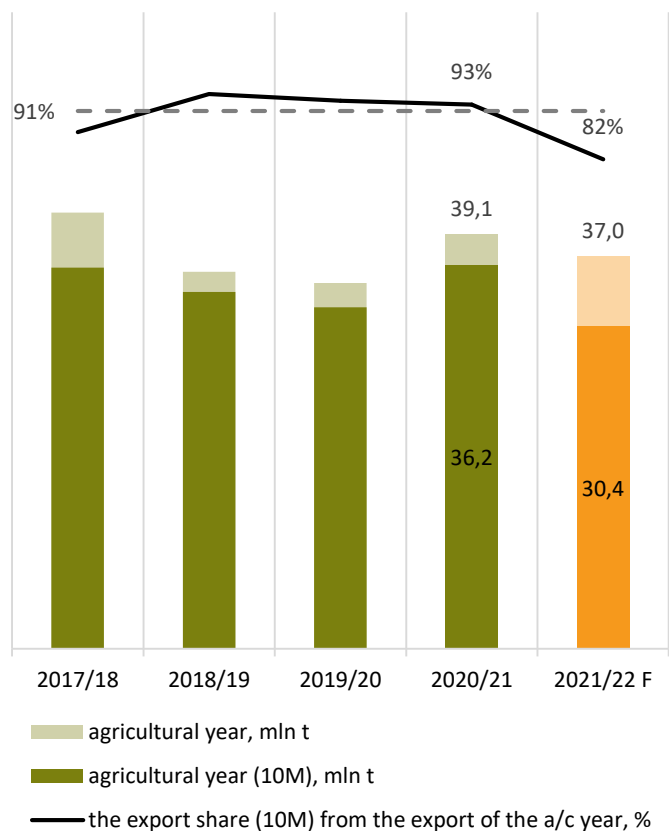
2017/18	2018/19	2019/20	2020/21	2021/22 F	2022/23 F
UNITED STATES 86,7 MLN T	UNITED STATES 78,1 MLN T	UNITED STATES 71,6 MLN T	UNITED STATES 97,2 MLN T	UNITED STATES 85,1 MLN T	UNITED STATES 82,2 MLN T
RUSSIA 53,1 MLN T	ARGENTINA 52,7 MLN T	UKRAINE 54,9 MLN T	ARGENTINA 54,8 MLN T	ARGENTINA 57,0 MLN T	ARGENTINA 58,7 MLN T
UKRAINE 40,1 MLN T	UKRAINE 49,9 MLN T	EU 52,9 MLN T	RUSSIA 49,4 MLN T	UKRAINE 47,8 MLN T	BRAZIL 49,8 MLN T
ARGENTINA 37,6 MLN T	RUSSIA 43,1 MLN T	ARGENTINA 51,5 MLN T	UKRAINE 44,9 MLN T	EU 46,4 MLN T	RUSSIA 49,3 MLN T
EU 33,6 MLN T	BRAZIL 40,3 MLN T	RUSSIA 43,3 MLN T	EU 40,9 MLN T	RUSSIA 44,5 MLN T	EU 48,0 MLN T

Export under phytosanitary certificates issued by Rosselkhoznadzor, Russian Ministry of Agriculture, USDA

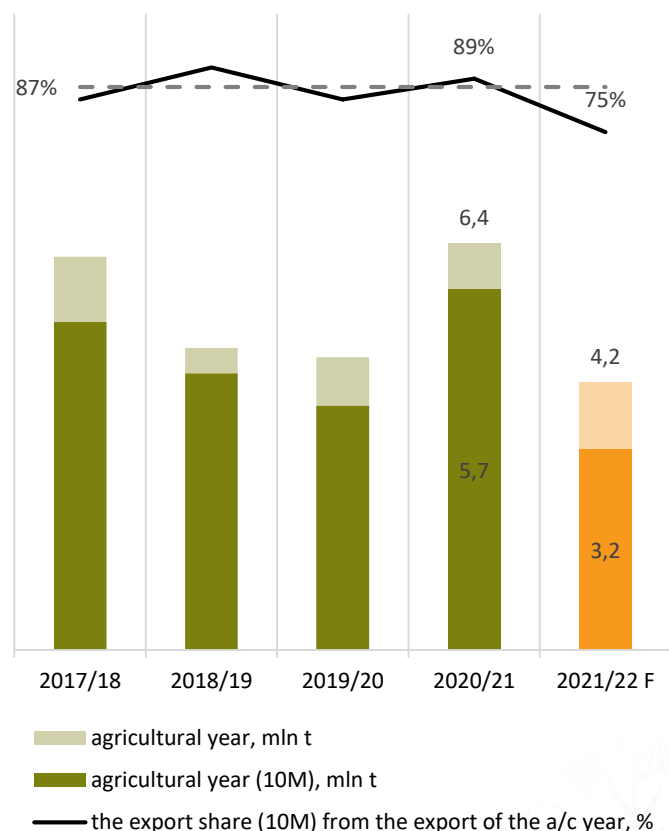
EXPORT DYNAMICS OF STAPLE GRAIN CROPS IN THE RUSSIAN FEDERATION, %



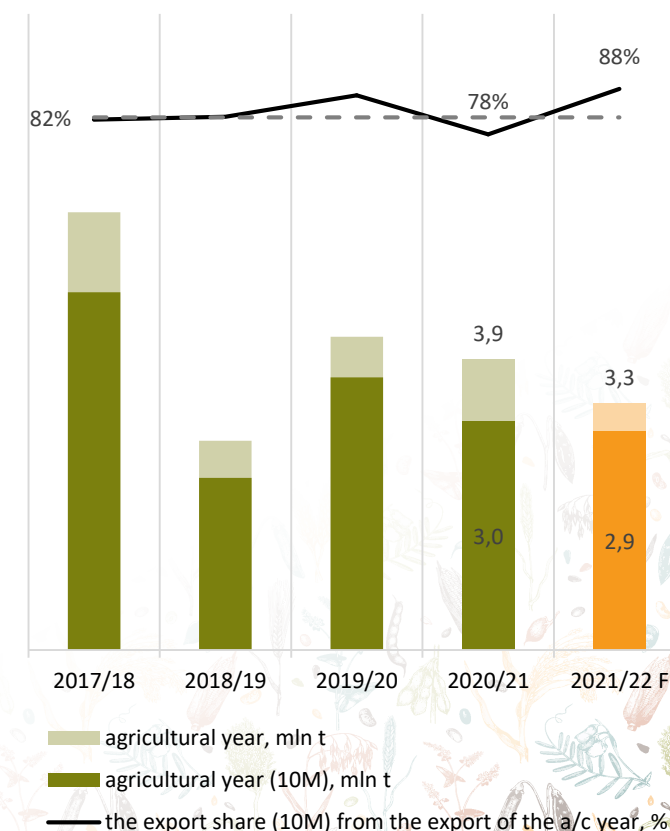
WHEAT, %



BARLEY, %



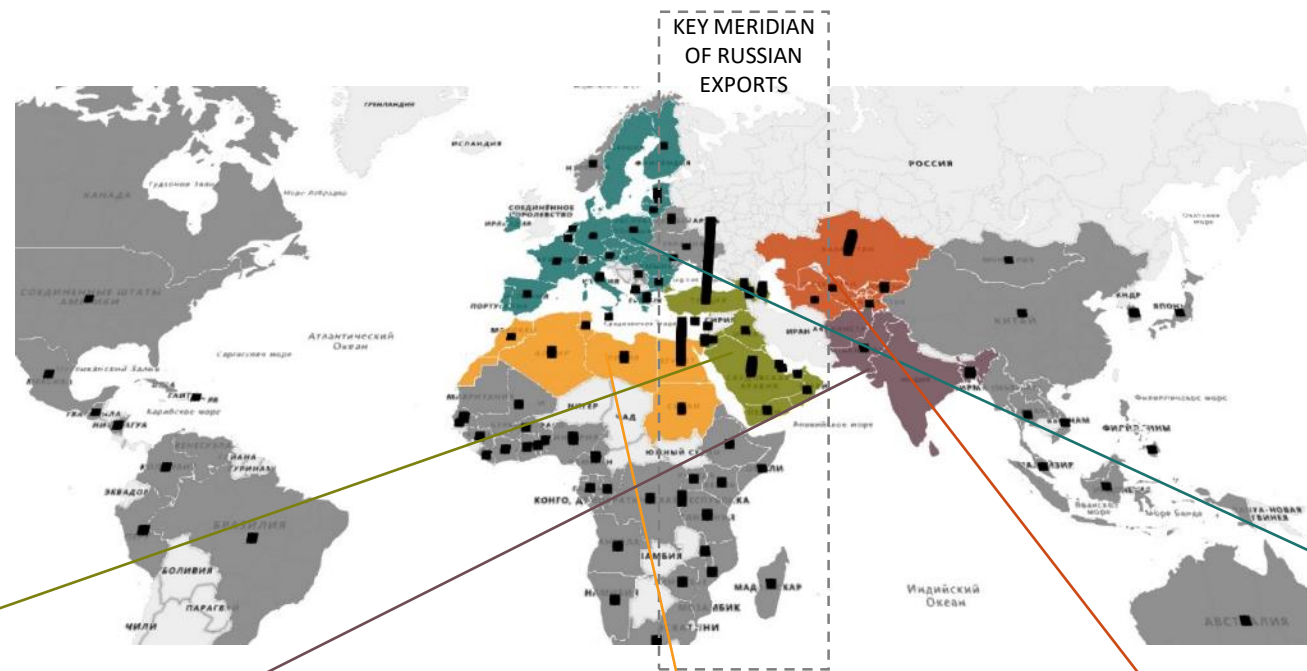
CORN, %



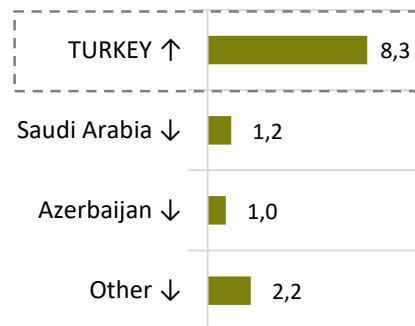
Export under phytosanitary certificates issued by Rosselkhoznadzor, Russian Ministry of Agriculture

EXPORT OF RUSSIAN GRAIN CROPS – 36,9 MLN TONS (-18% TO 2020/21)

MAIN EXPORT DESTINATIONS IN 2021/22



MIDDLE EAST – 12,7 MLN T (-24%)
16 COUNTRIES

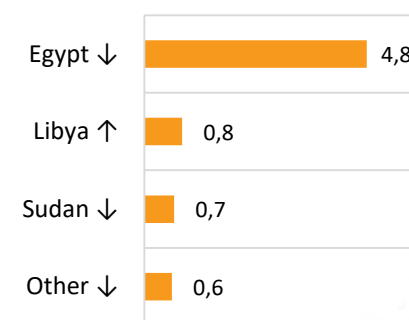


SOUTH ASIA – 8,2 MLN T (+35%)
3 COUNTRIES

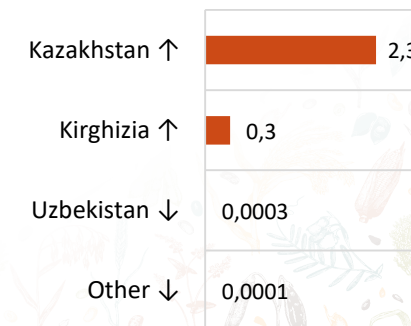
! RECORD EXPORT GROWTH



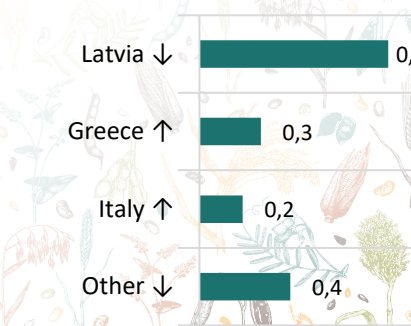
NORTH AFRICA – 6,9 MLN T (-34%)
6 COUNTRIES



CENTRAL ASIA – 2,7 MLN T (+77%)
5 COUNTRIES



EU – 1,8 MLN T (-5%)
17 COUNTRIES



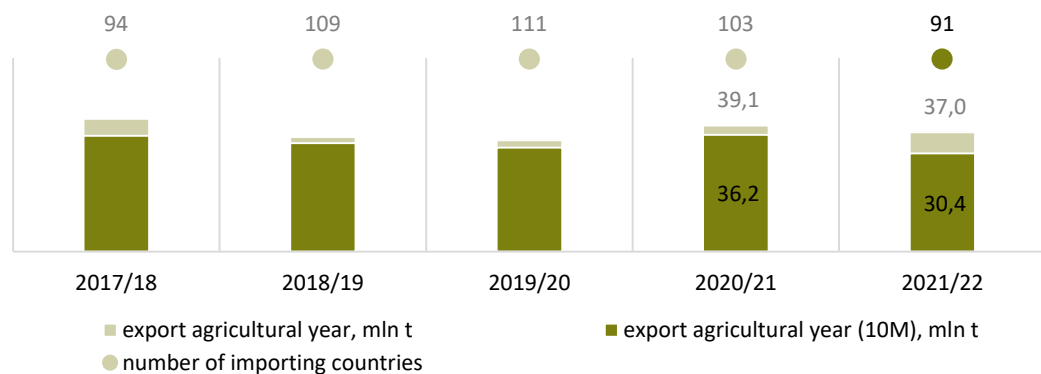
*Export under phytosanitary certificates issued by Rosselkhozadzor

country – share (dynamics to 2020/21)

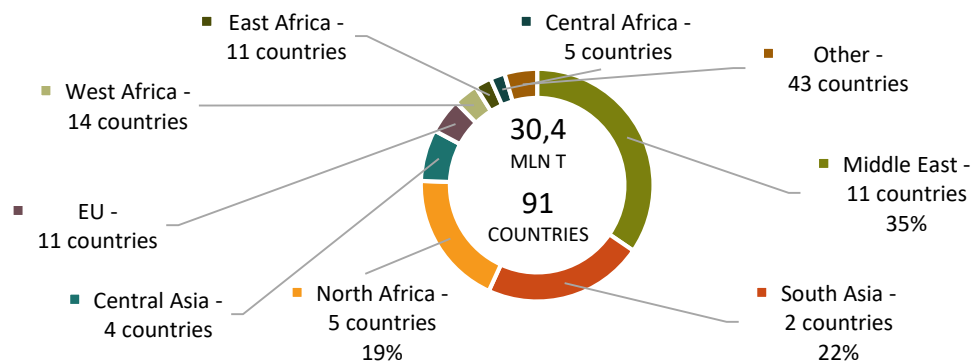
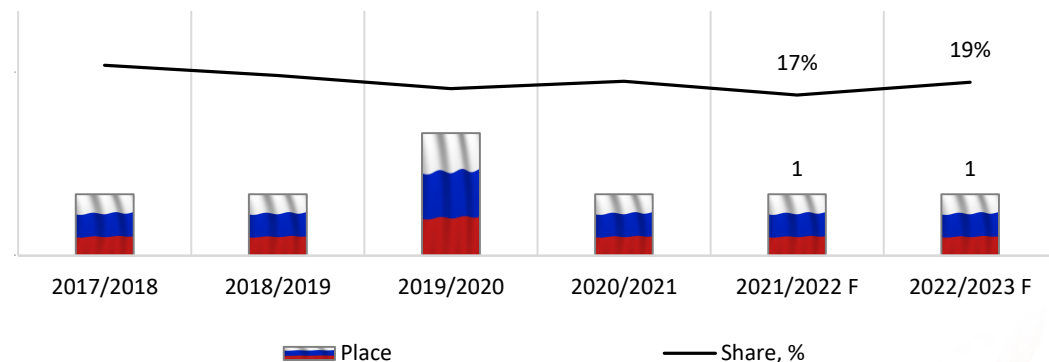
2021/22 WHEAT EXPORT FORECAST

THIS SEASON RUSSIA WILL RETAIN ITS LEADING POSITION IN WHEAT EXPORTS

THE FORECAST OF RUSSIAN WHEAT EXPORTS, MLN T



RUSSIA'S SHARE IN THE WORLD WHEAT EXPORTS



	2017/18	2018/19	2019/20	2020/21	2021/22 F	2022/23 F
RUSSIA	41,1 MLN T	35,5 MLN T	39,8 MLN T	39,1 MLN T	37,0 MLN T	39,0 MLN T
EU	24,9 MLN T	25,5 MLN T	34,5 MLN T	29,7 MLN T	34,0 MLN T	36,0 MLN T
UNITED STATES	24,7 MLN T	24,7 MLN T	26,4 MLN T	27,0 MLN T	27,5 MLN T	24,0 MLN T
CANADA	22,0 MLN T	24,4 MLN T	24,1 MLN T	26,4 MLN T	21,4 MLN T	24,0 MLN T
UKRAINE	17,8 MLN T	16,0 MLN T	21,0 MLN T	23,8 MLN T	19,0 MLN T	21,1 MLN T

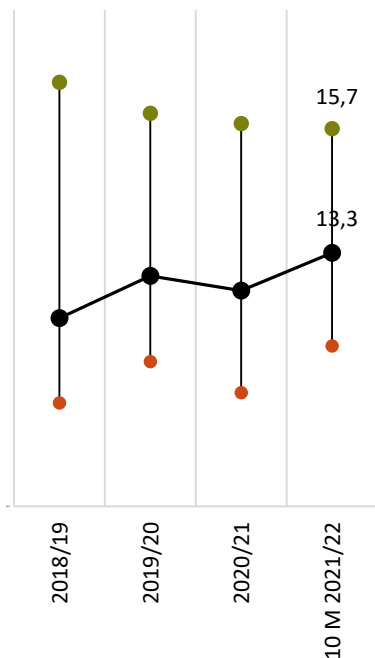
Export under phytosanitary certificates issued by Rosselkhoznadzor, Russian Ministry of Agriculture, USDA

MAIN QUALITY PARAMETERS (ISO) OF THE EXPORTED RUSSIAN SOFT WHEAT

10 M 2021/22

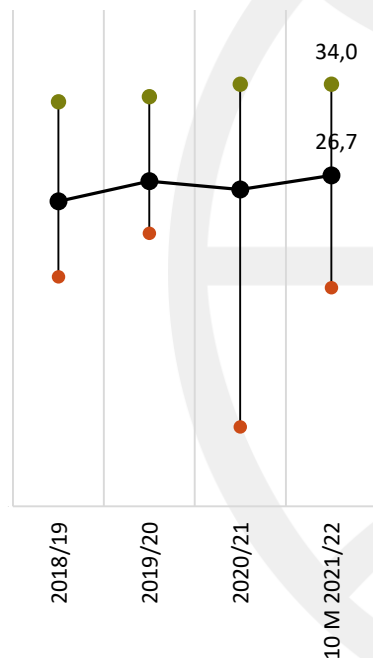
13,3 ↑

PROTEIN, %



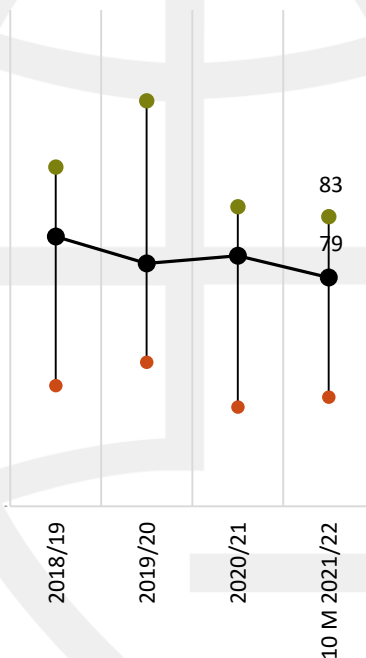
26,7 ↑

CRUDE GLUTEN, %



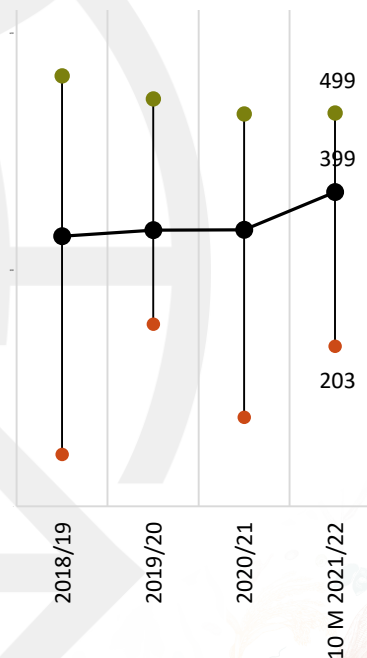
79 →

TEST WEIGHT, KG/HL



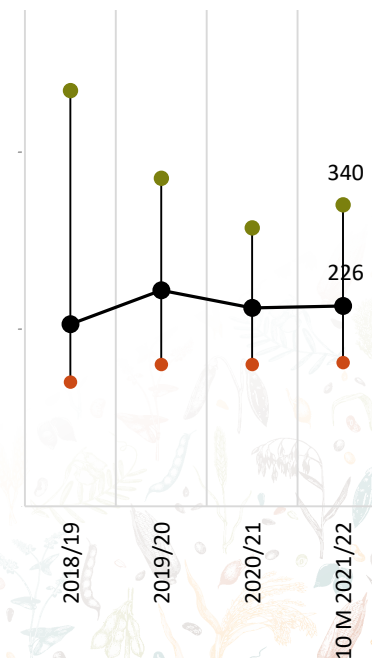
399 ↑

FALLING NUMBER, SEC



226 →

W, 10-4 J



● MIN ● MAX ● AVG

● MIN ● MAX ● AVG

● MIN ● MAX ● AVG

● MIN ● MAX ● AVG

● MIN ● MAX ● AVG

*According to FSI Federal Centre of Grain Quality Assurance

MAIN QUALITY PARAMETERS (ISO) OF THE RUSSIAN SOFT WHEAT EXPORTED TO TURKEY

10 M 2021/22

13,0 →

12,1 - 13,5

PROTEIN, %

26,9 ↑

21,0 - 34,0

CRUDE GLUTEN, %

79 →

76 - 81

TEST WEIGHT, KG/HL

386 ↑

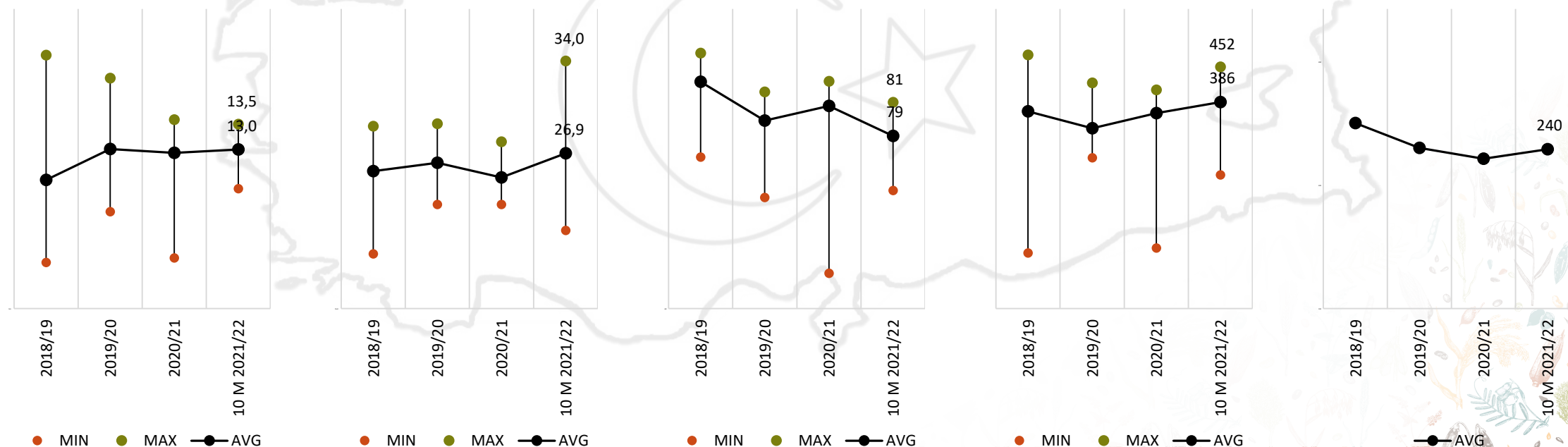
250 - 452

FALLING NUMBER, SEC

240 ↑

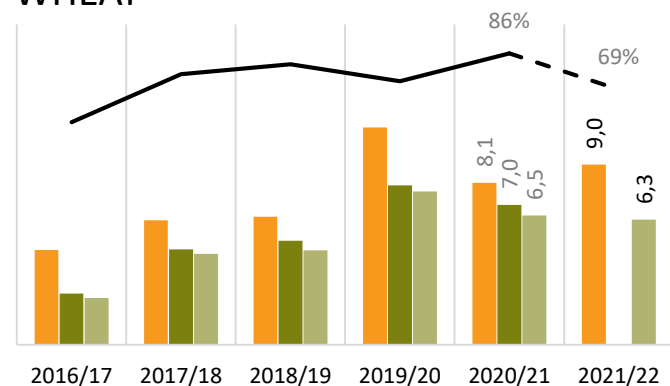
207-340

W, 10-4 J

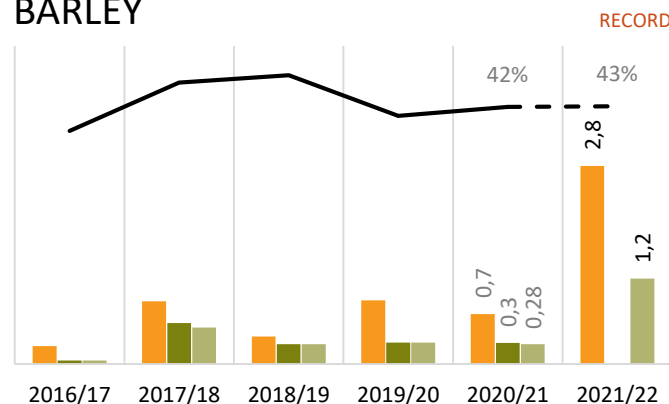


THE RUSSIAN EXPORT OF TOP 5 GRAIN PRODUCTS TO TURKEY AND THE SHARE OF THE RUSSIAN GRAIN IN TURKEY'S IMPORT

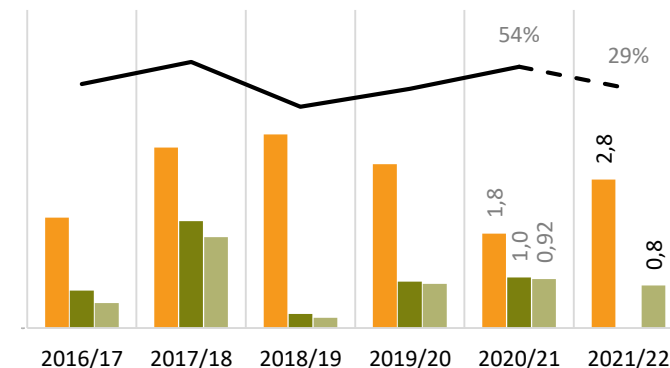
WHEAT



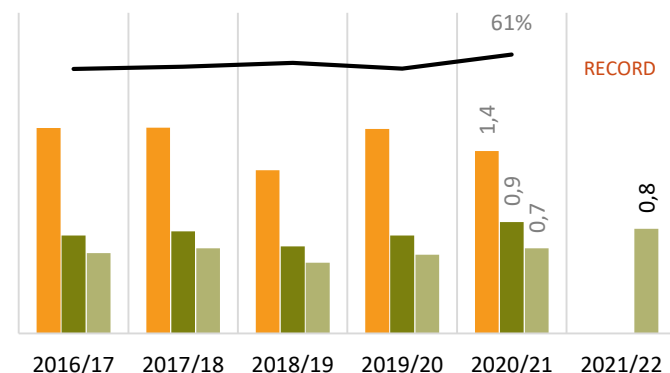
BARLEY



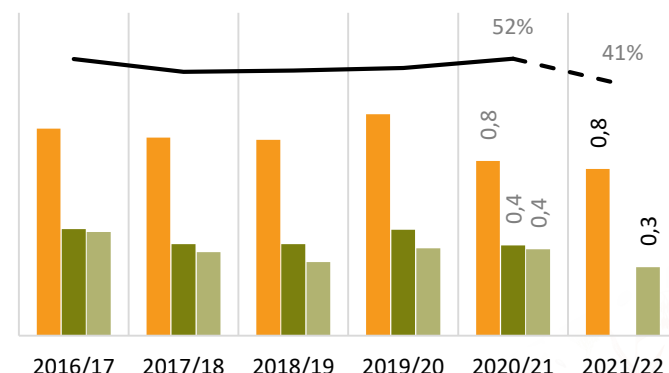
CORN



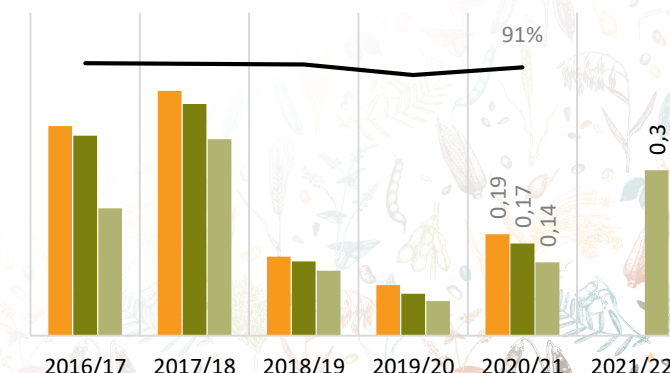
WHEAT BRAN



SUNFLOWER MEAL



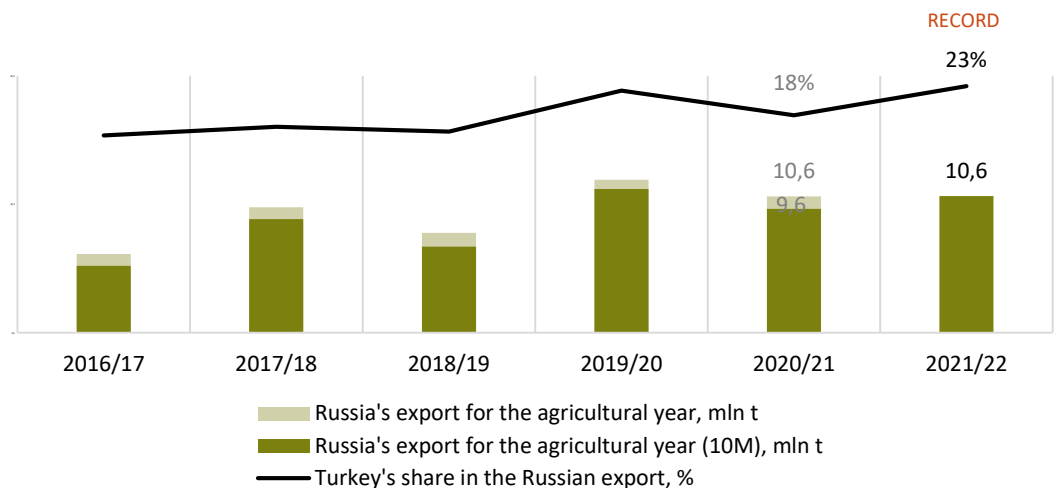
PEA



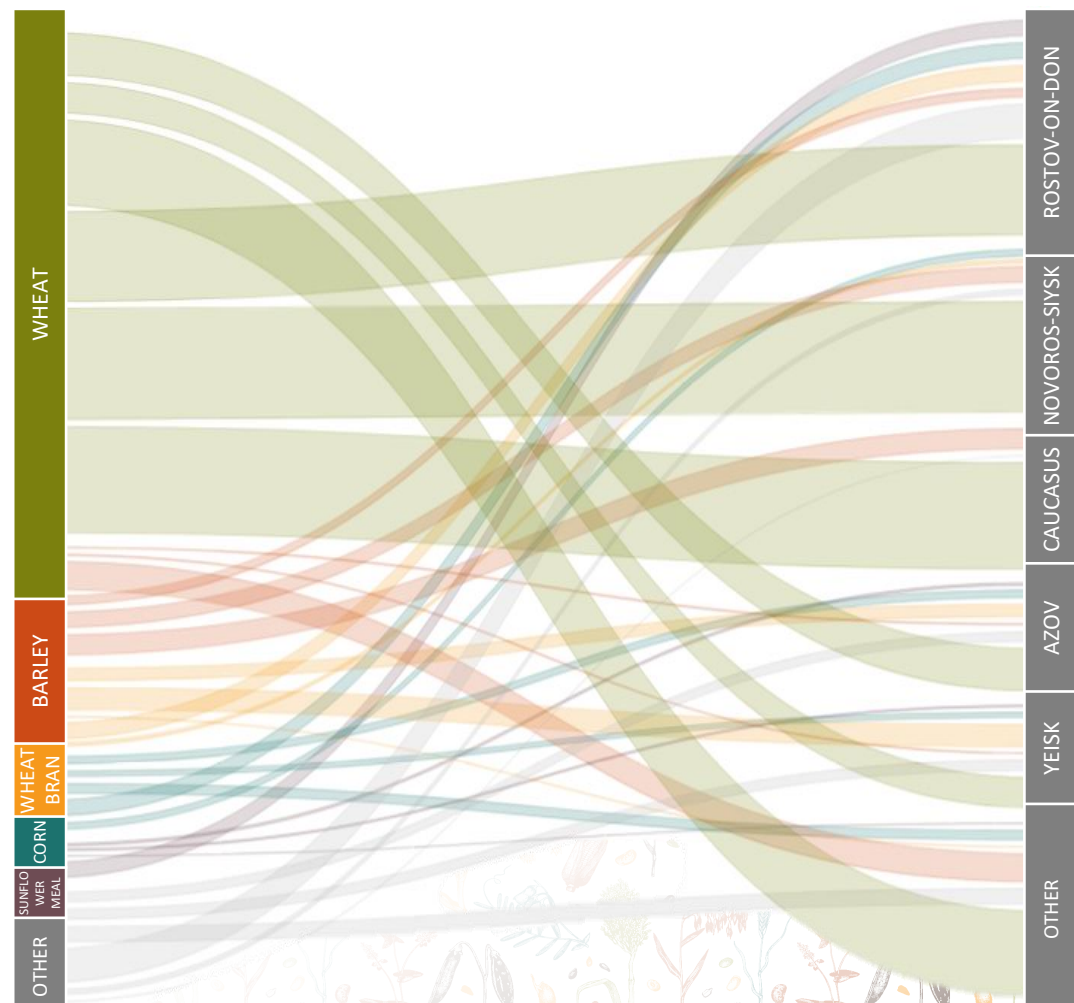
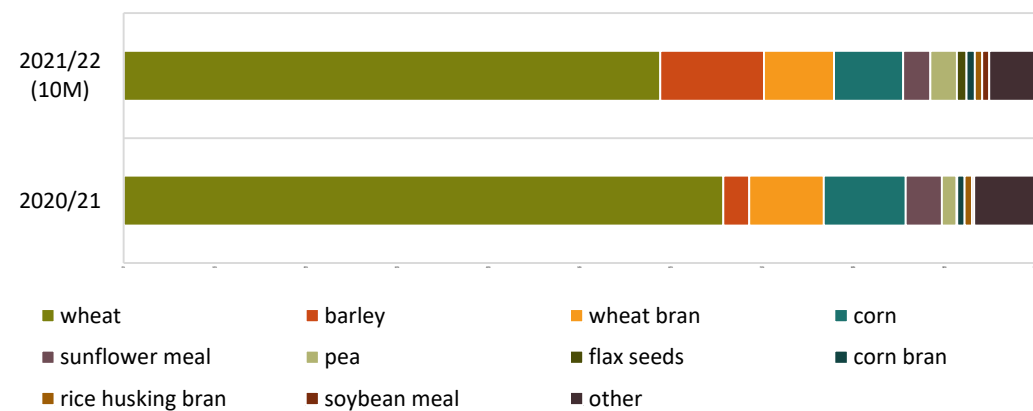
■ Turkey's import for the agricultural year, mln t
 ■ The export of Russia for the agricultural year, mln t
 ■ The export of the Russia for the agricultural year (10M), mln t
 — The Russian share in the import, %

THE RUSSIAN EXPORT OF GRAIN AND GRAIN PRODUCTS TO TURKEY

10 M 2021/22



TOP 10 GRAIN PRODUCTS





FSI CENTRE OF GRAIN QUALITY ASSURANCE

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