

Ukrainian Grain and Oilseed Markets after Four Years of Resilience

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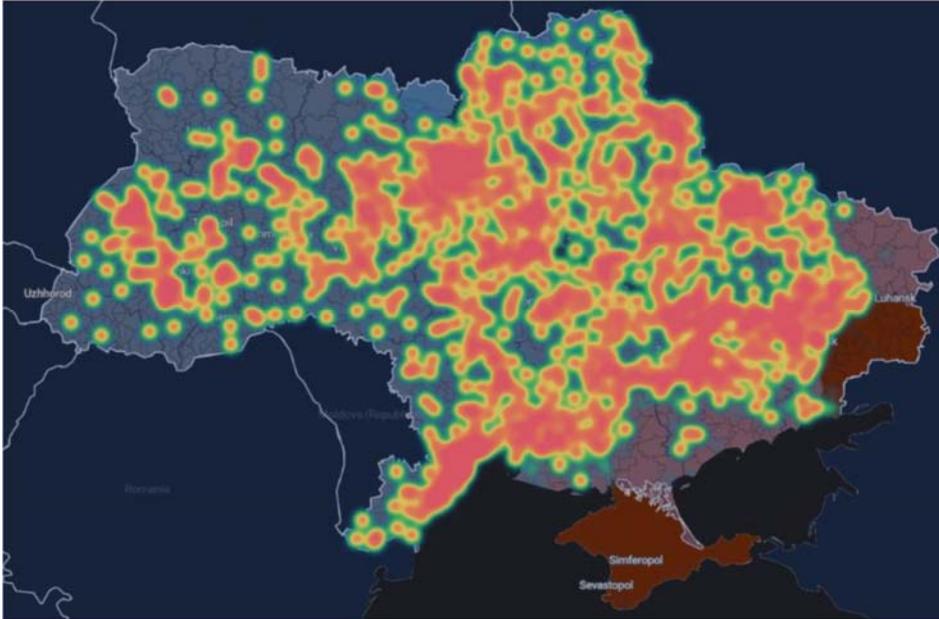
KANSAS STATE Agricultural Economics
UNIVERSITY

OUTLINE:

- Damages and losses from the war
- Current state of grain and oilseed exports from Ukraine
- Current state of grain and oilseed production in Ukraine and 2026 forecast
- Infrastructure issues that reducing grain and oilseed production and exports from Ukraine
- Situation on grain and oilseeds markets in Russia
- Dynamics of grain and oilseed world prices



SPATIAL DISTRIBUTION OF AERIAL ATTACKS BETWEEN FEBRUARY 2022 AND DECEMBER 2025



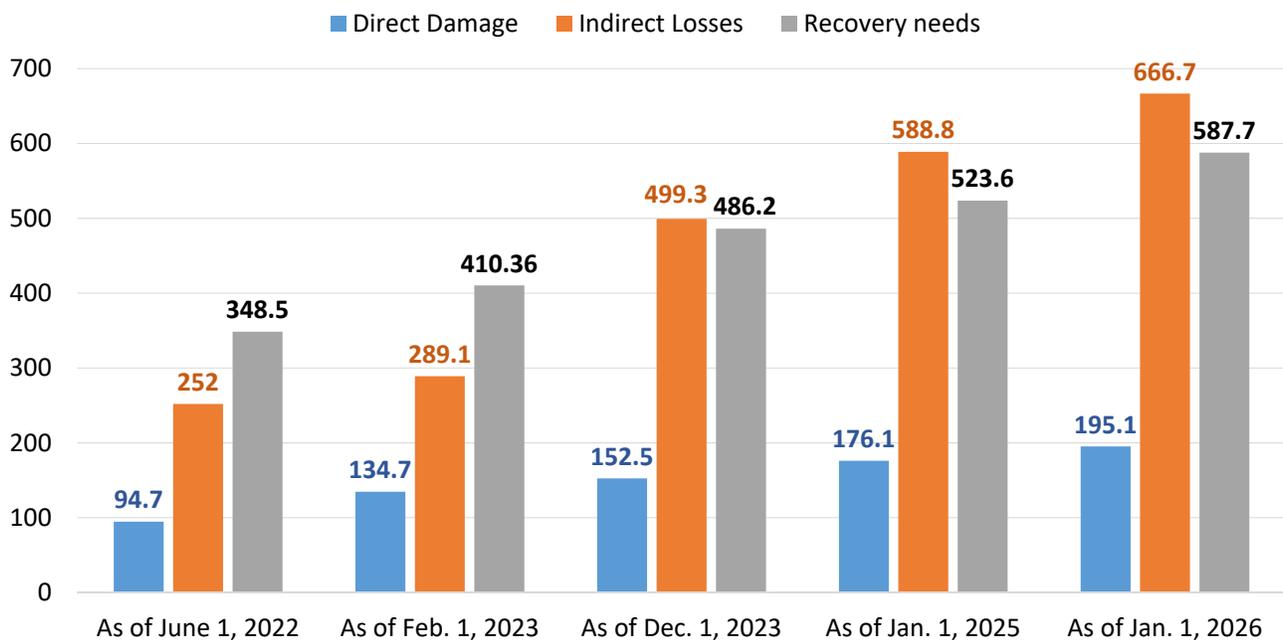
HAVY HUMAN TOLL

- 15.2** thousand civilians have been killed
- 41.4** thousand civilians have been injured
- 8** hundreds children have been killed
- 2.5** thousand children have been injured
- 11** million people displaced, 6 million outside of Ukraine

Note: The map represents the spatial distribution of aerial attacks, with red colors representing a higher concentration of attack counts

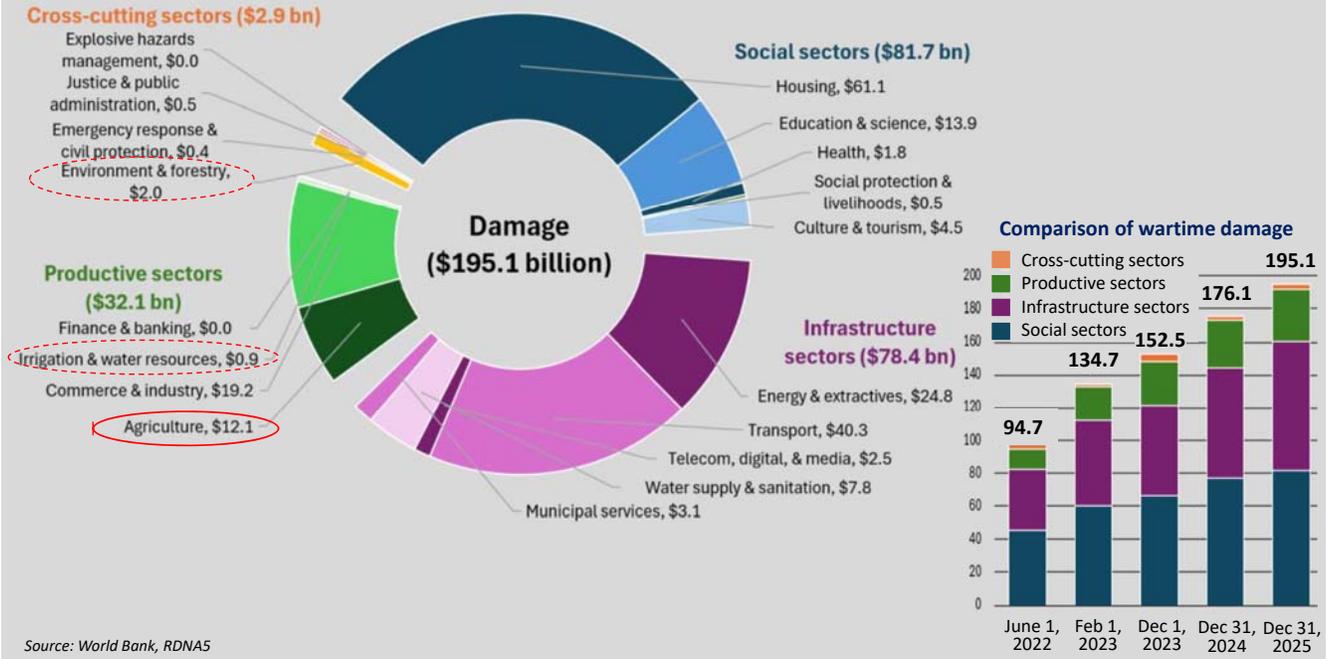
Source: World Bank, RDNA5, UN

IMPACT OF THE WAR ON UKRAINE’S ECONOMY BY VARIOUS CATEGORIES, \$ BILLION

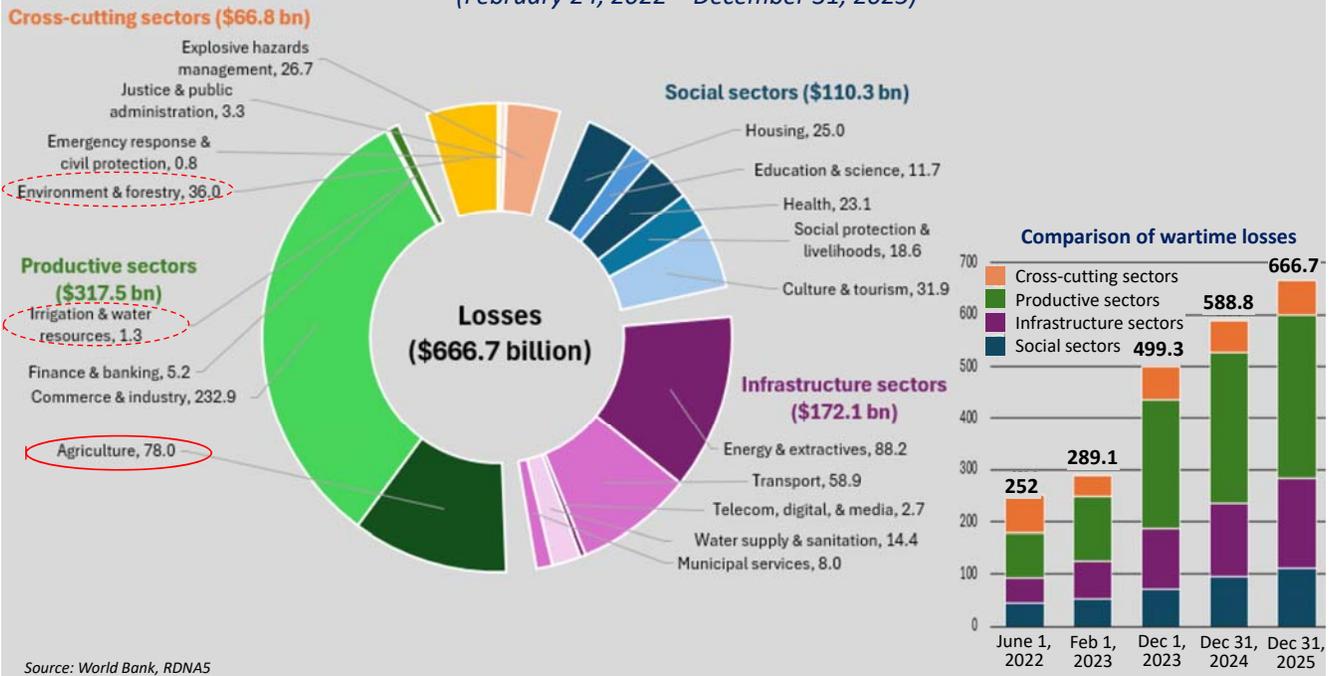


Source: World Bank, RDNA5

TOTAL DIRECT DAMAGE TO THE UKRAINIAN ECONOMY, US\$ billion (February 24, 2022 – December 31, 2025)



TOTAL INDIRECT LOSSES OF THE UKRAINIAN ECONOMY, US\$ billion (February 24, 2022 – December 31, 2025)



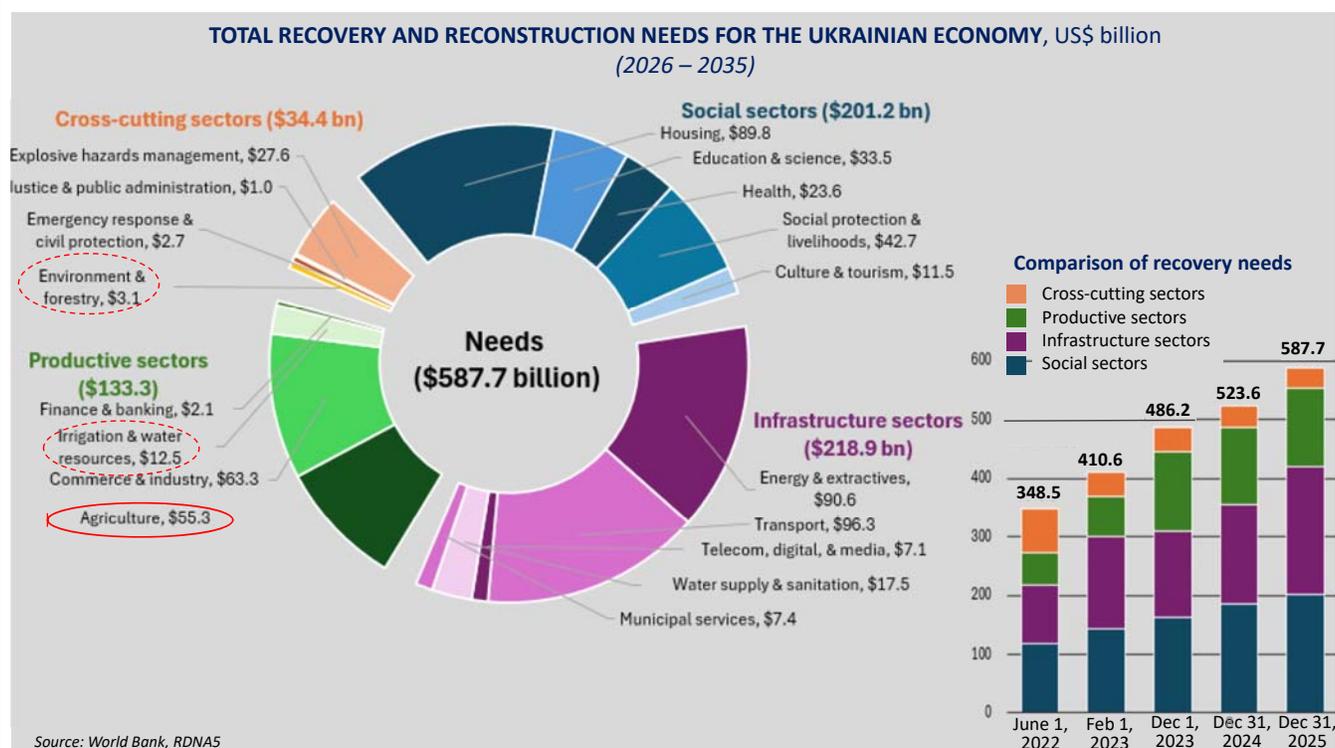
UKRAINE'S AGRICULTURE LOSSES ASSESSMENT (US\$ BILLION)

Types of losses	Estimated losses, \$ billion, by method	
	Revenue	Value added
Decrease in income due to reduced production (crop production)	47.180	19.170
Decrease in income due to reduced production (livestock, beekeeping, fisheries and aquaculture)	4.611	1.874
Decrease in income due to disruption of logistics and lower domestic prices for major export crops	24.783	10.070
Decrease in producers' profits due to rising prices for basic factors of production	4.533	1.842
Additional costs due to the need for reclamation	0.533	0.217
Costs of dismantling and removal of construction waste	0.289	0.289
Total sector losses	81.929	33.461

Note: The data covers the period from February 2022 to December 2025 (actual losses) and the projected period until the end of 2026.

Source: Ukrstat, Kyiv School of Economics

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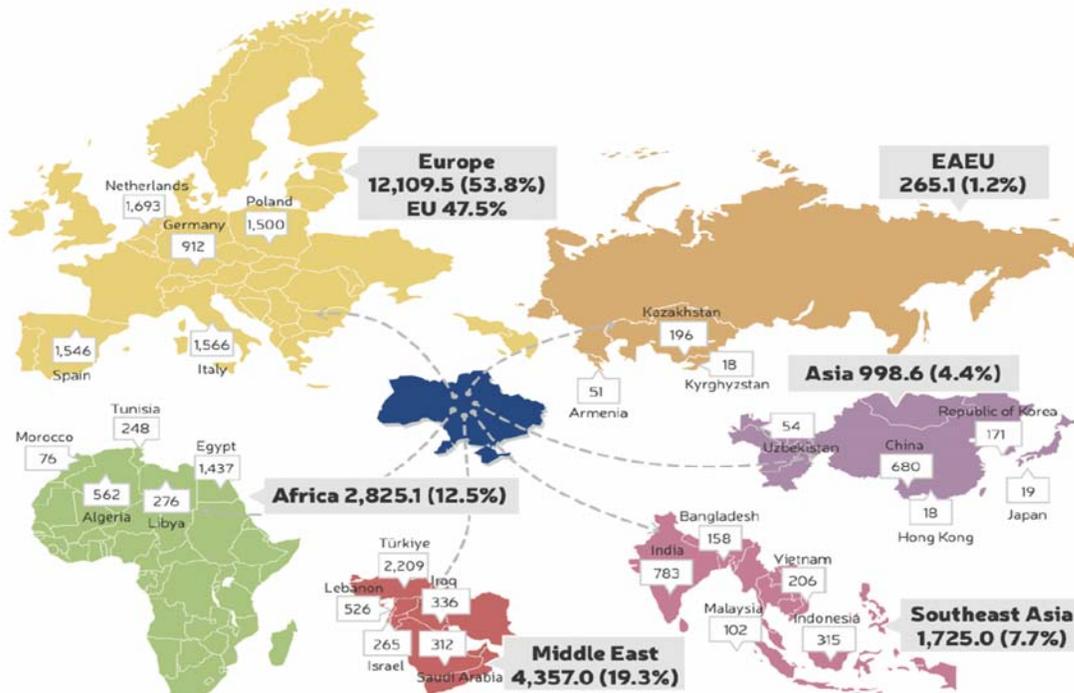
ROLE OF UKRAINE IN WORLD AGRICULTURE 2025 (Rank in the world market)

	Export, mln \$	Production	Export
Sunflower oil	5,214	#2	#2
Corn	3,901	#7	#4
Wheat	2,988	#10	#7
Soybeans	1,333	#9	#7
<i>Poultry</i>	<i>1,088</i>	<i>#19</i>	<i>#6</i>
Rapeseed	886	#15	#6
Sunflower meal	807	#2	#1
Soybean oil	588	#14	#6
Soybean meal	521	#14	#6
Rapeseed oil	398	#15	#6
Barley	341	#7	#5
<i>White sugar</i>	<i>221</i>	<i>#20</i>	<i>#12</i>
<i>Butter</i>	<i>107</i>	<i>#13</i>	<i>#8</i>
<i>Powdered milk, cream</i>	<i>96</i>	<i>#13</i>	<i>#9</i>
<i>Beef</i>	<i>88</i>	<i>#21</i>	<i>#17</i>
<i>Live bovine animals</i>	<i>43</i>	<i>#15</i>	<i>#7</i>
Sunflower seeds	43	#2	#9
<i>Walnuts</i>	<i>78</i>	<i>#5</i>	<i>#5</i>

Source: USDA, rank by natural indicators

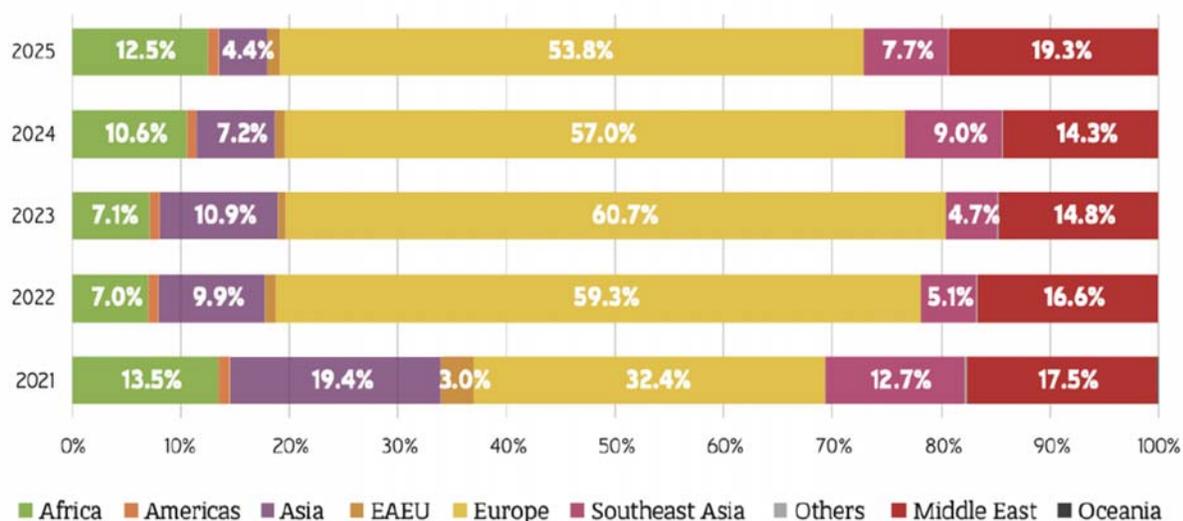
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MAJOR IMPORTERS OF UKRAINIAN AGRICULTURAL PRODUCTS IN 2025, mln \$



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UKRAINE'S AGRICULTURAL EXPORT DESTINATIONS OVER THE YEARS



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

	2023/24 MY Total	2024/25 MY		2025/26* MY	2025/26* to the same period of 2024/25	
		Total	as of March 1, 2025	Total, as March 1, 2026	thousand metric tonnes	%
Grain and legumes, total	51,086	40,602	29,608	22,819	-6,789	- 22.9 %
• wheat	18,497	15,723	12,115	9,218	-2,897	- 23.9 %
• barley	2,532	2,318	2,126	1,361	-765	- 36.0 %
• rye	6.0	10.8	10.8	0.2	-11	- 98.1 %
• corn	29,523	21,963	14,924	11,931	-2,993	- 20.1 %
Wheat flour	92.8	66.5	45.2	43.2	-2	- 4.4 %
Other flour	5.4	4.6	3.8	1.2	-3	- 68.4 %
<i>Total flour</i>	<i>98.2</i>	<i>71.1</i>	<i>49.0</i>	<i>44.4</i>	<i>-5</i>	<i>- 9.4 %</i>
Total grain & flour export	51,184	40,673	29,657	22,863	-6,794	- 22.9 %
Sunflower seeds	313	68	41	22	-19	- 46.3 %
Sunflower oil	6,248	4,731	2,416	2,124	-292	- 12.1 %
Soybeans	3,257	4,163	2,348	1,440	-908	- 38.7 %
Rapeseeds	3,902	2,616	1,823	951	-872	- 47.8 %

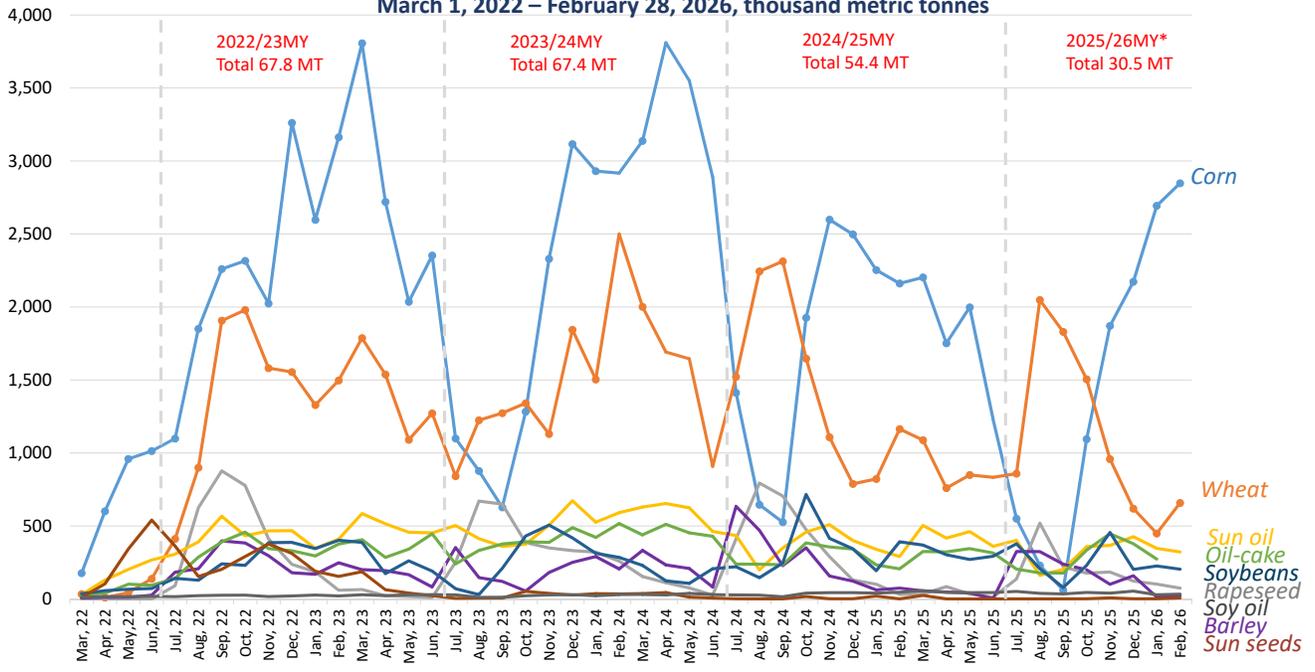
Note: MY (marketing year):

Rapeseeds - June

* for oilseeds - September-August

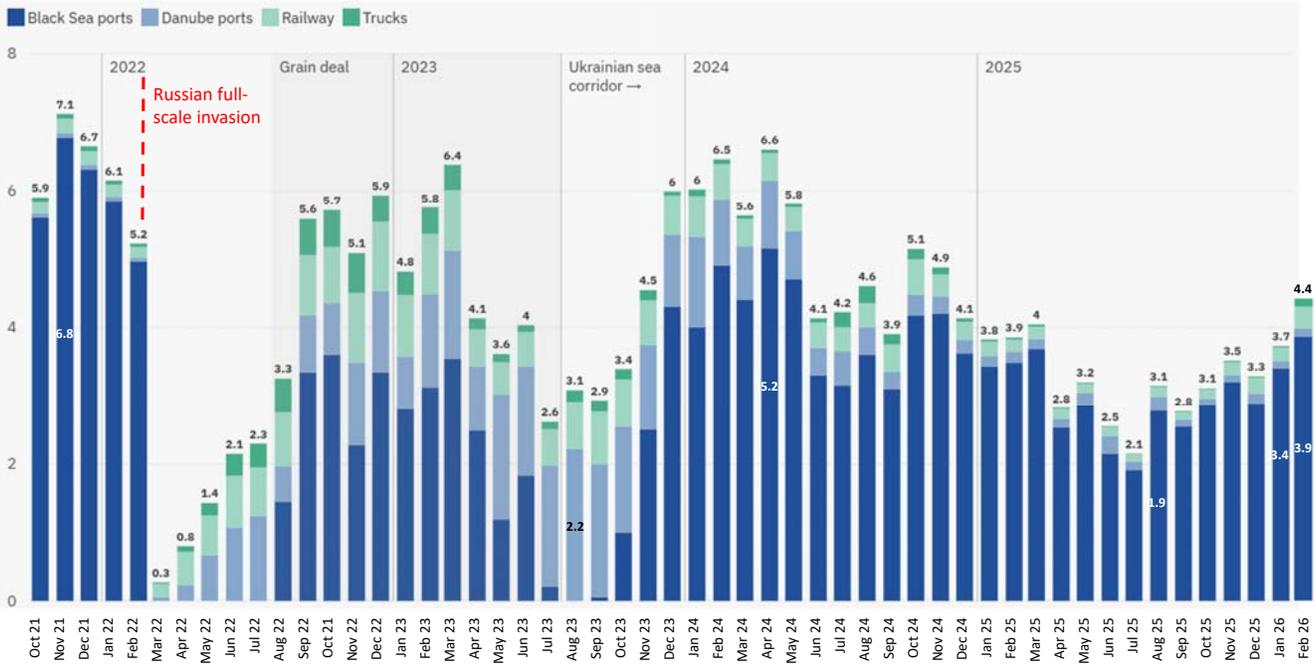
Source: based on data of State Customs Service of Ukraine and Ministry of Agrarian Policy and Food of Ukraine

**EXPORT SHIPMENTS FROM UKRAINE DURING THE WAR TIME BY TYPES OF AGRICULTURAL COMMODITIES,
March 1, 2022 – February 28, 2026, thousand metric tonnes**



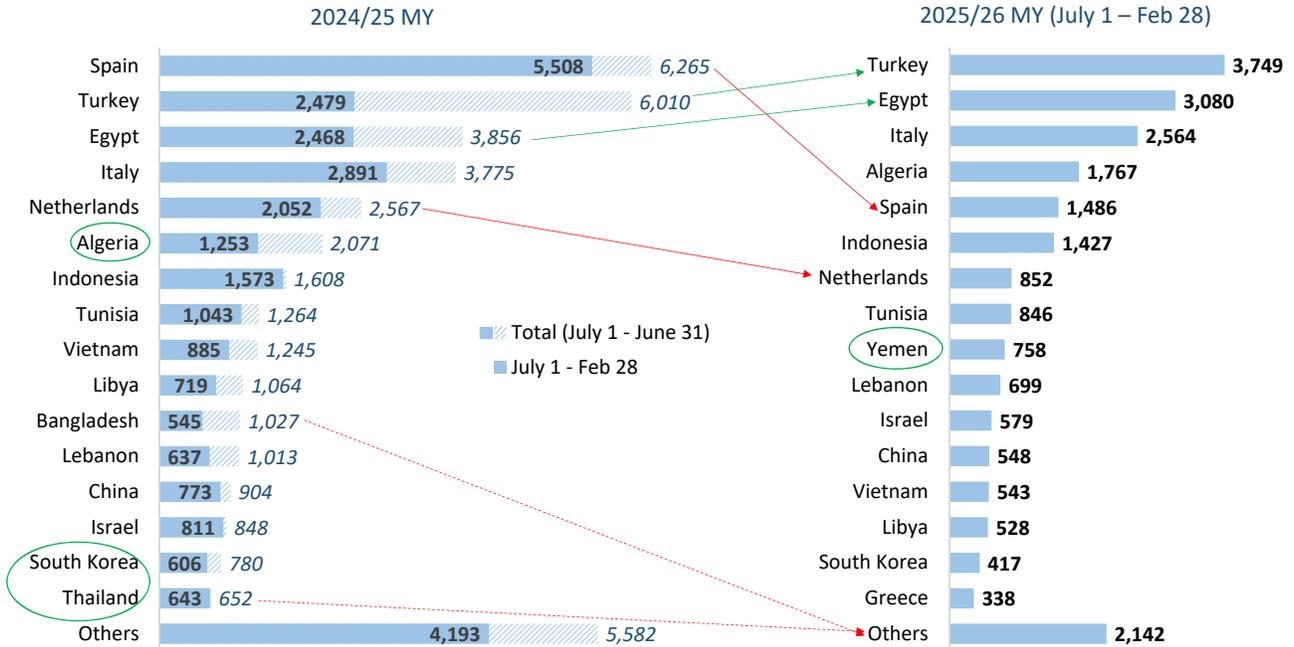
Source: based on data of the Ministry of Agrarian Policy and Food of Ukraine and Ministry of Infrastructure of Ukraine

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

GEOGRAPHY OF GRAIN EXPORT FROM UKRAINE, thousand metric tonnes

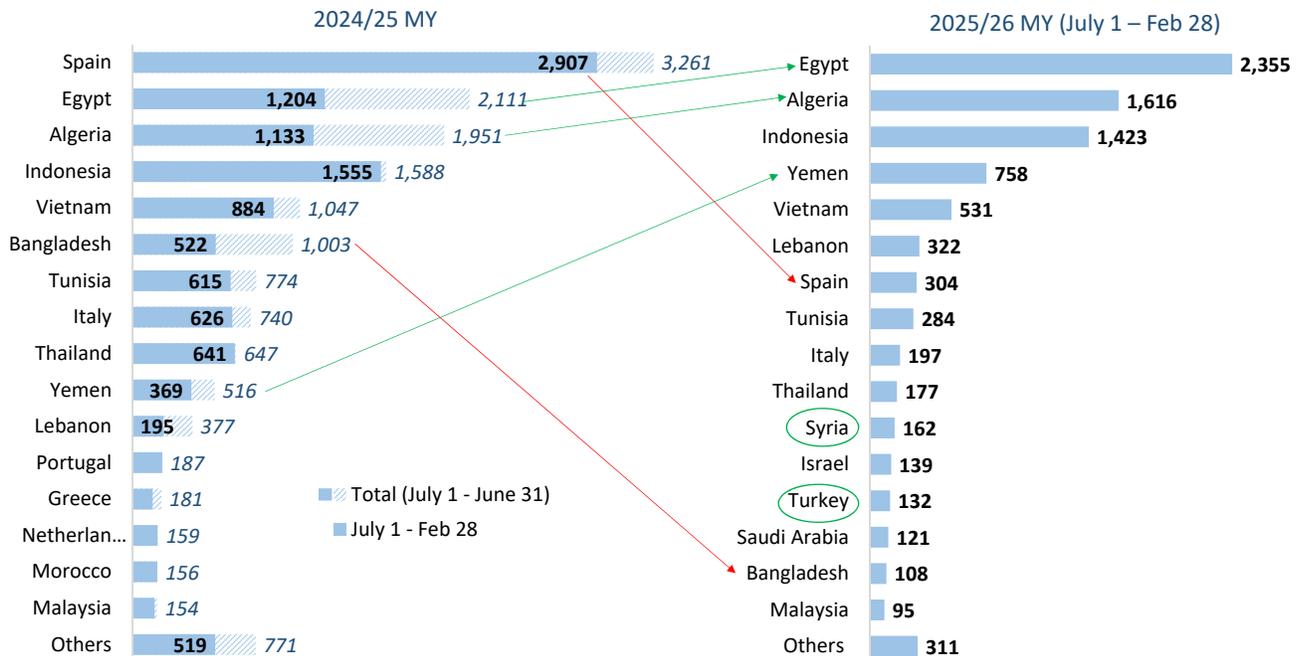


Note: MY July 1 - June 31

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

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GEOGRAPHY OF WHEAT EXPORT FROM UKRAINE, thousand metric tonnes

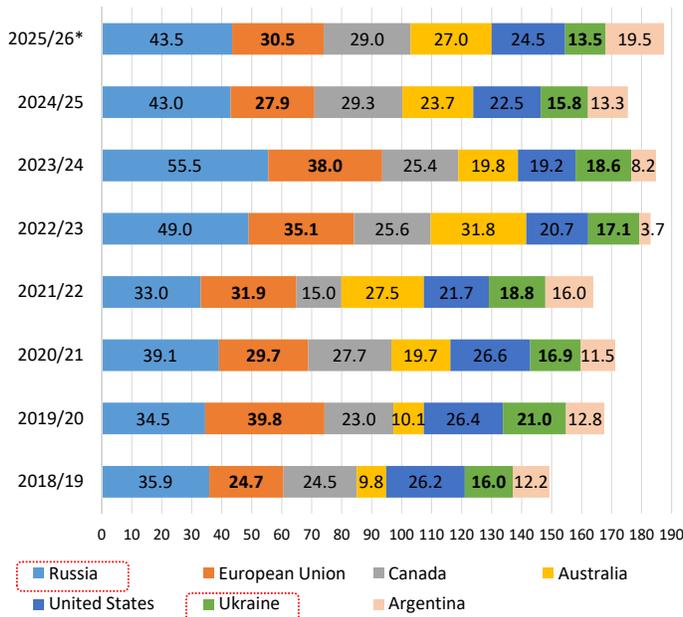


Note: MY July 1 - June 31

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

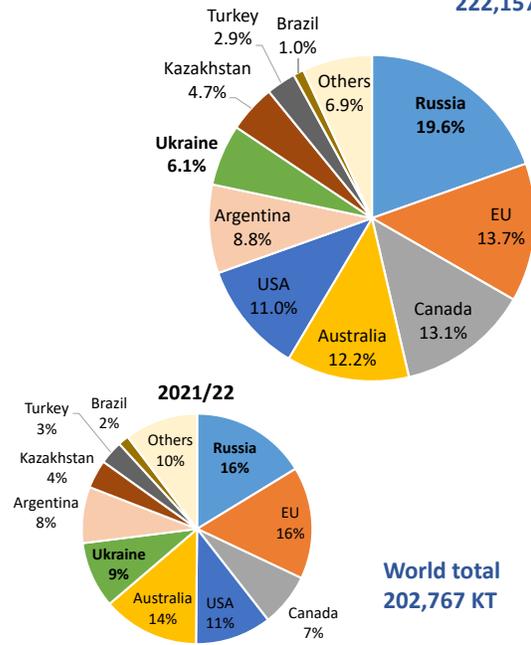
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WORLD WHEAT EXPORT FROM KEY EXPORTING COUNTRIES, million metric tonnes
(forecast as of March 10, 2026)



2025/26*

**World total
222,157 KT**

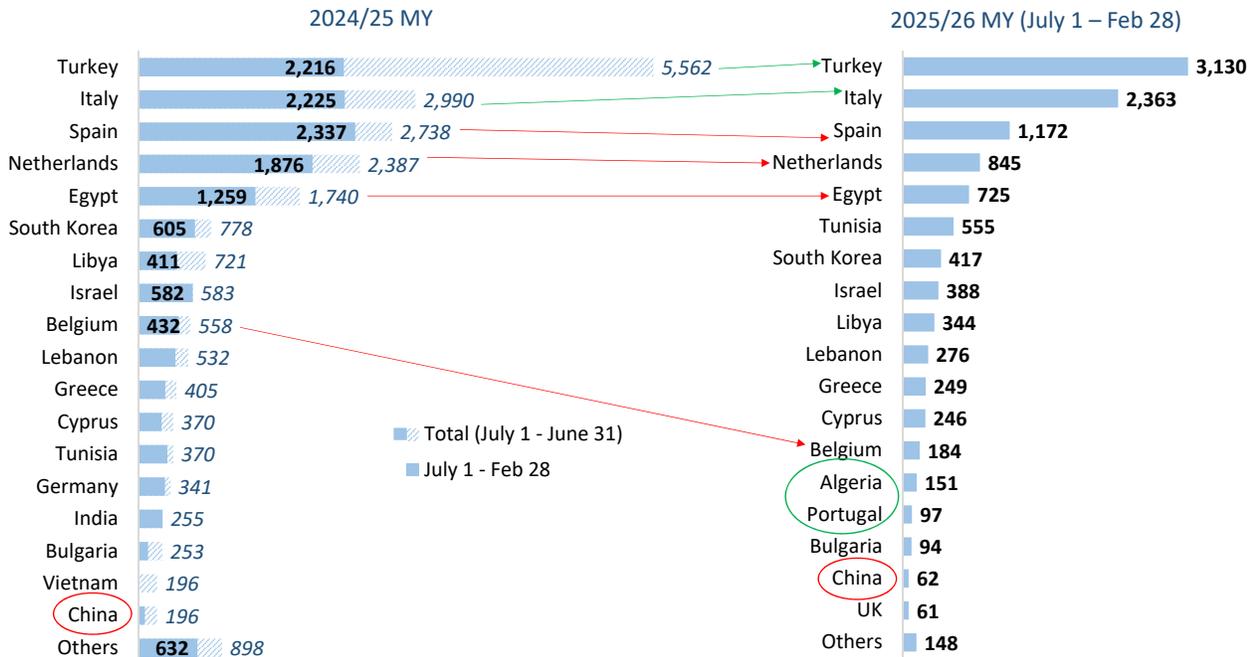


**World total
202,767 KT**

Source: based on data of the USDA-WASDE

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

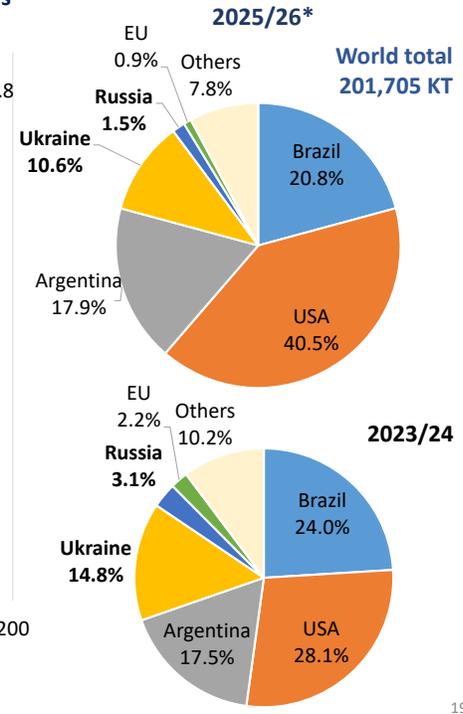
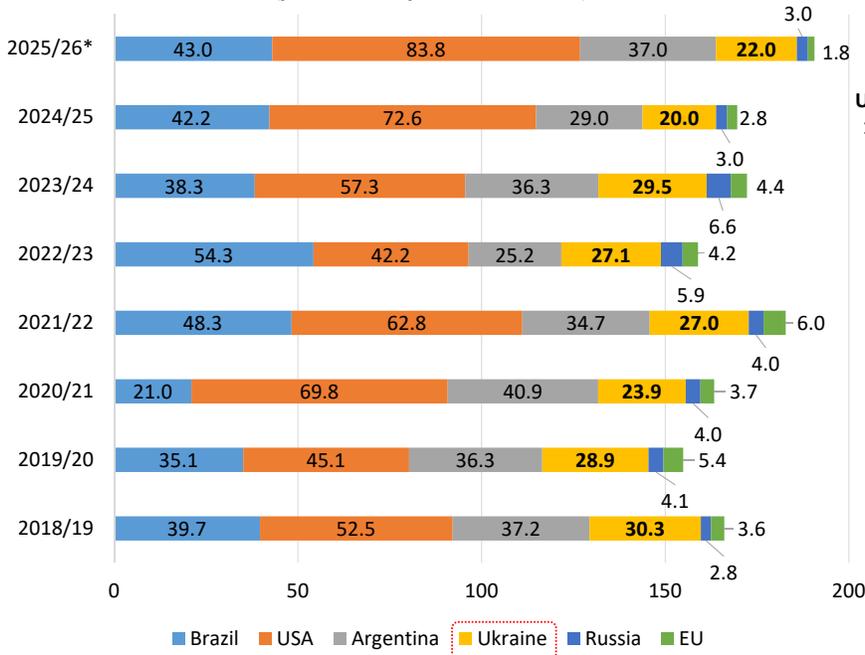


Note: MY July 1 – June 31

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

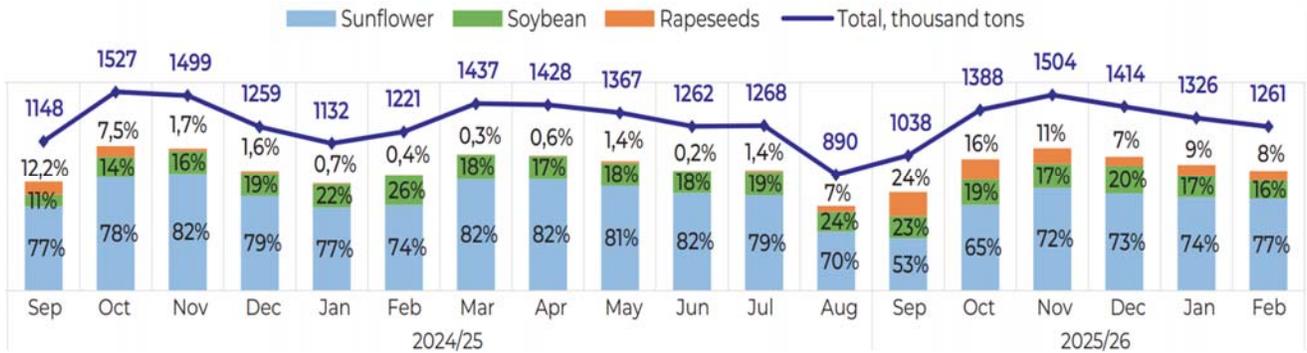
18

WORLD CORN EXPORT FROM KEY EXPORTING COUNTRIES, million metric tonnes
(forecast as of March 10, 2026)

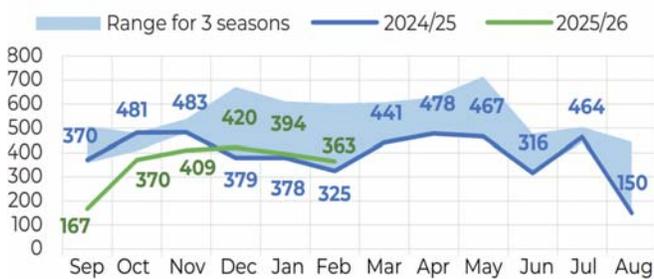


Source: based on the data of the USDA-WASDE

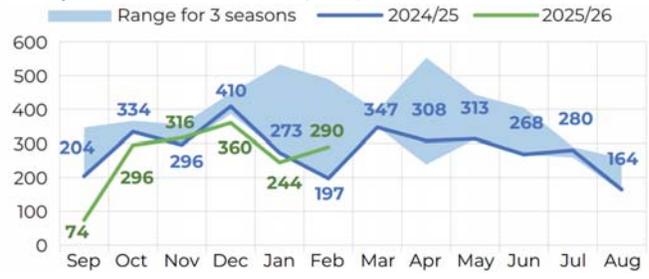
STRUCTURE OF PROCESSING OF MAIN OILSEEDS, %



Export of sunflower oil from Ukraine, thsd tonnes

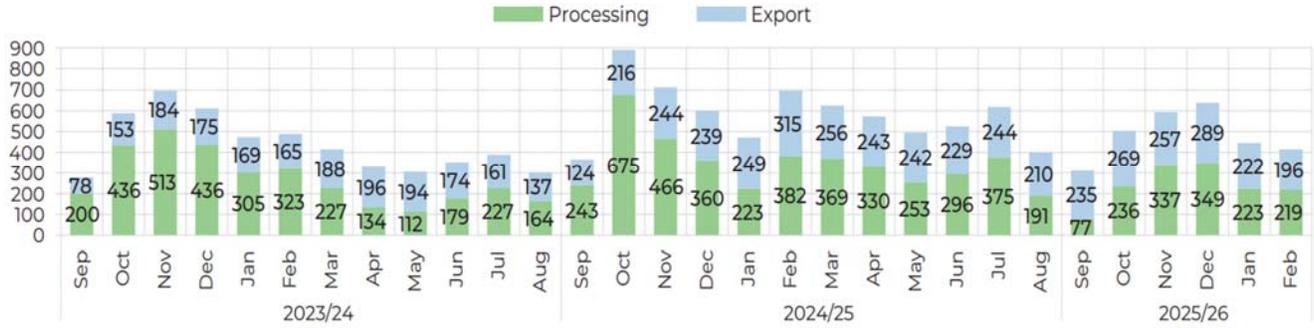


Export of sunflower meal (cake) from Ukraine, thsd tonnes

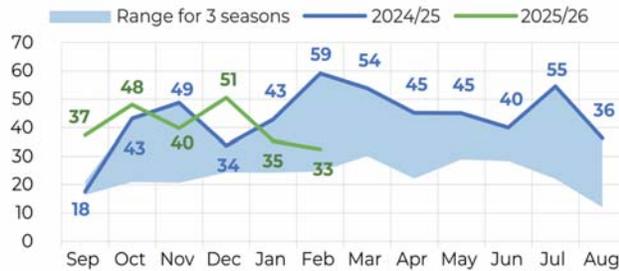


Source: based on data of the State Customs Service of Ukraine and APK-Inform

DYNAMICS OF SOYBEANS PROCESSING AND EXPORT IN UKRAINE, thsd tonnes



Soybean oil export from Ukraine, thsd tonnes

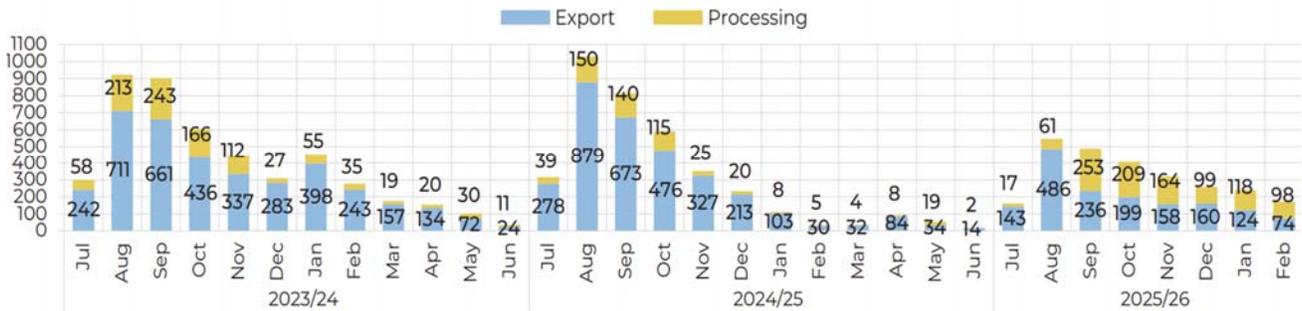


Soybean meal export from Ukraine, thsd tonnes



Source: based on data of the State Customs Service of Ukraine and APK-Inform

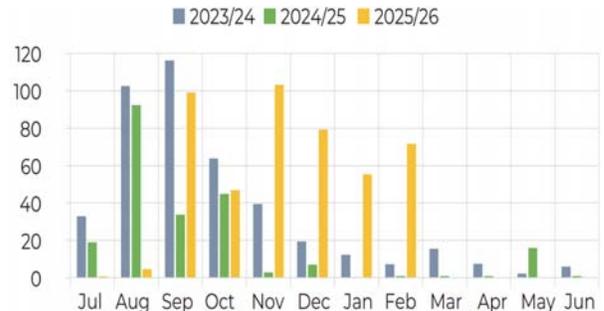
DYNAMICS OF RAPESEED PROCESSING AND EXPORT IN UKRAINE, thsd tonnes



Export of rapeseed oil from Ukraine, thsd tonnes

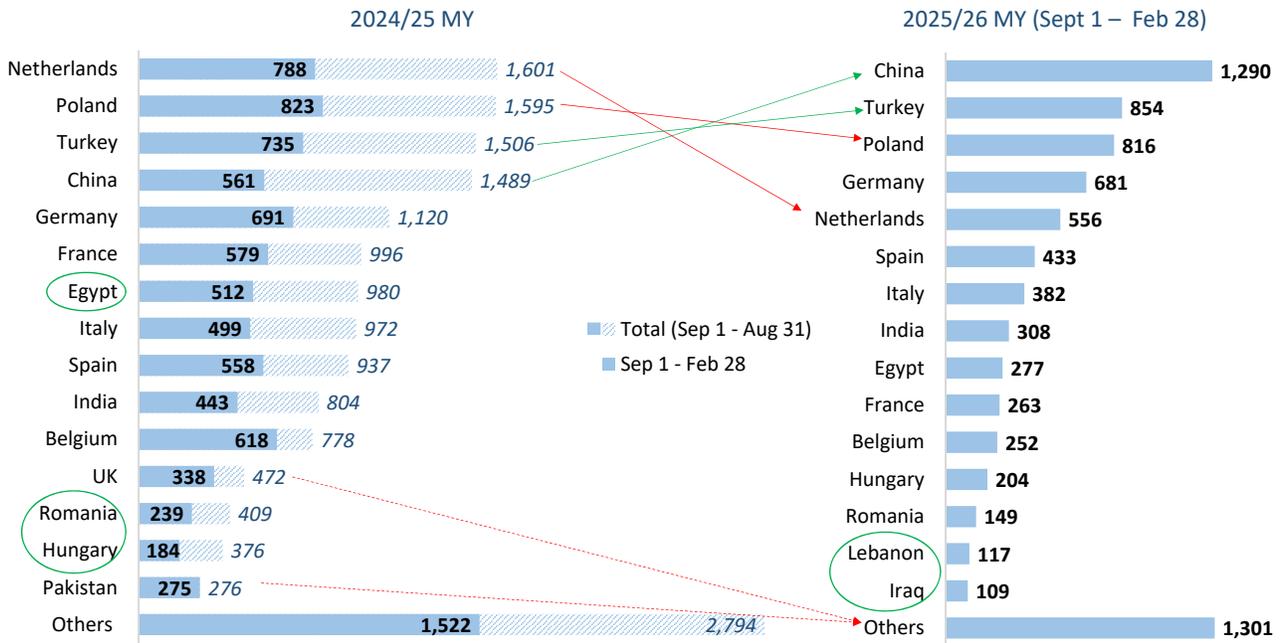


Rapeseed meal export from Ukraine, thsd tonnes



Source: based on data of the State Customs Service of Ukraine and APK-Inform

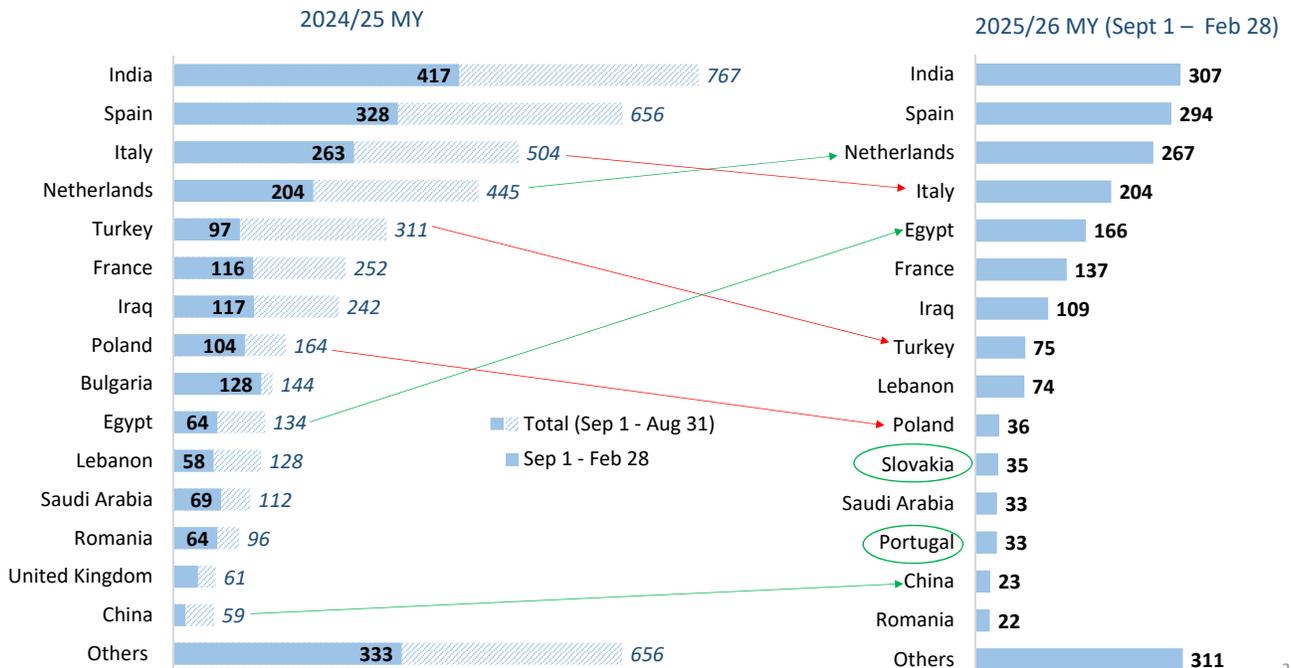
EXPORT GEOGRAPHY OF OILSEEDS (soybeans, sunflower, rapeseed) AND BY-PRODUCTS (oil and meal/cake) FROM UKRAINE, thousand metric tonnes



Note: MY September 1 – August 31

Source: based on data of the State Customs Service of Ukraine ²³

EXPORT GEOGRAPHY OF SUNFLOWER OIL FROM UKRAINE (September 1 – August 31), thousand metric tonnes



Note: MY September 1 – August 31

Source: based on data of the State Customs Service of Ukraine ²⁴

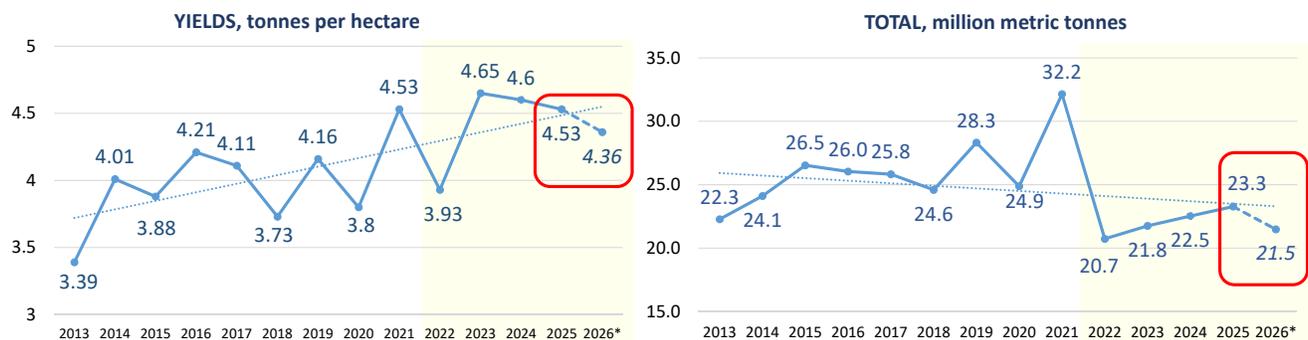
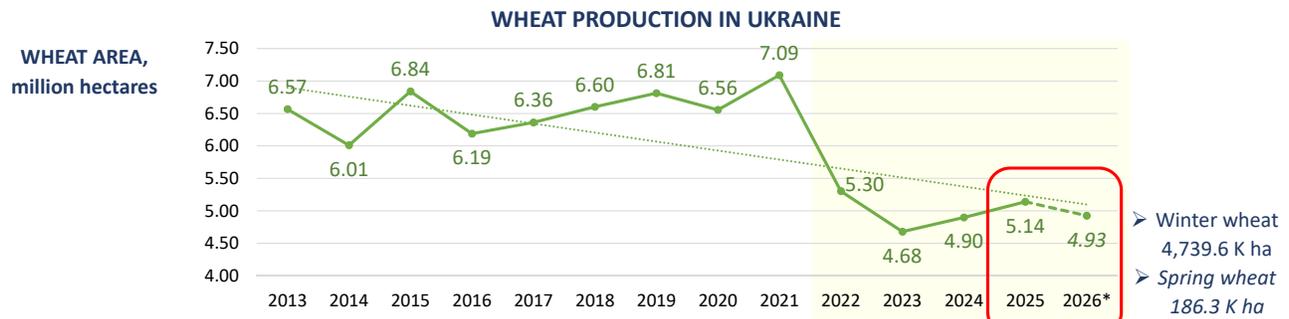
AREA OF GRAIN, LEGUMES AND OIL CROPS IN UKRAINE, thousand hectares
Updated as of March 1, 2026

Crops	2021	...	2024	2025		Change in area,%	
	Harvested		Harvested	Planted	Harvested	2025 to 2021	2025 to 2024
Grain and legumes total, including:	15,948.4		11,130.3	11,878.8	11,572.0	- 27.4 %	+ 4.0 %
•wheat	7,090.2		4,898.0	5,213.4	5,140.3	- 27.5 %	+ 4.9 %
•barley	2,472.1		1,401.7	1,390.4	1,376.1	- 44.3 %	- 1.8 %
•corn	5,481.8		4,076.0	4,575.2	4,371.7	- 20.3 %	+ 7.3 %
•peas	240.2		210.4	281.4	276.1	+ 14.9 %	+ 31.2 %
•buckwheat	91.9		90.3	58.1	58.9	- 35.9 %	- 34.8 %
•millet	97.1		92.6	34.3	30.1	- 69.0 %	- 67.5 %
Soybeans	1,322.9		2,726.2	2,090.8	2,043.6	+ 54.5 %	- 25.0 %
Rapeseed	1,004.5		1,251.3	1,216.8	1,206.5	+ 20.1 %	- 3.6 %
Sunflower	6,665.1		5,047.0	5,222.0	5,137.4	- 22.9 %	+ 1.8 %

*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

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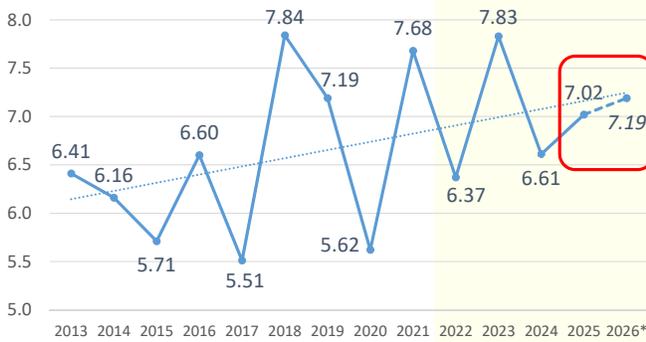
Source: based on data of the State Statistic Service of Ukraine

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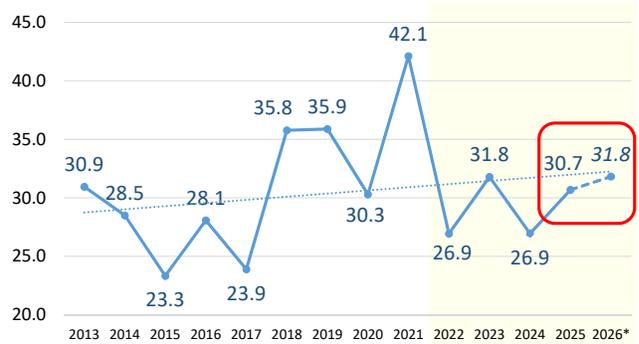
CORN PRODUCTION IN UKRAINE



YIELDS, tonnes per hectare

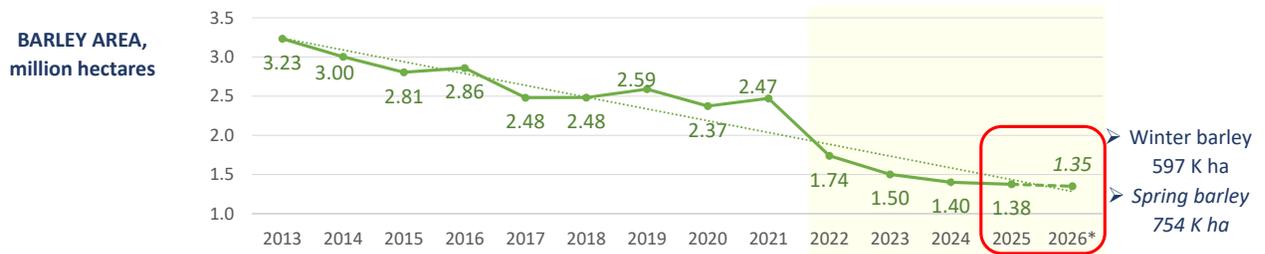


TOTAL, million metric tonnes

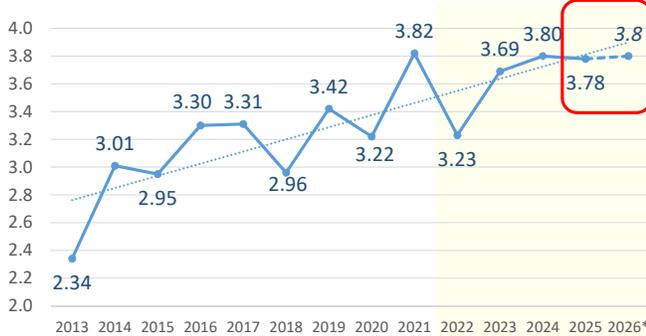


Source: based on data of the State Statistic Service of Ukraine

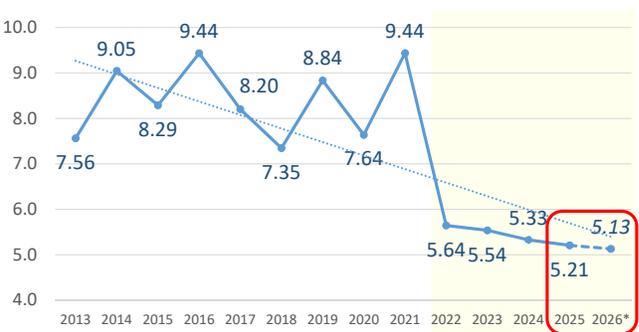
BARLEY PRODUCTION IN UKRAINE



YIELDS, tonnes per hectare



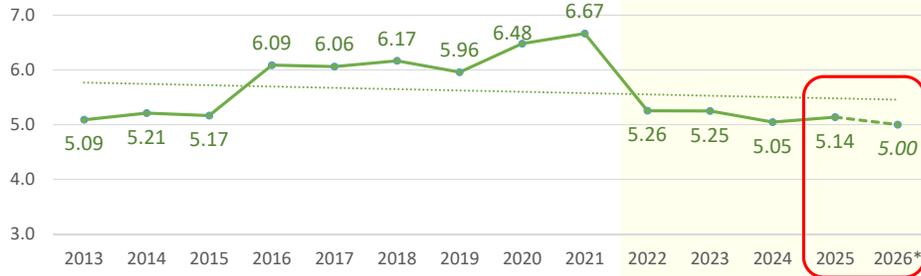
TOTAL, million metric tonnes



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

SUNFLOWER SEEDS PRODUCTION IN UKRAINE

SUNFLOWER AREA,
million hectares



YIELDS, tonnes per hectare



TOTAL, million metric tonnes

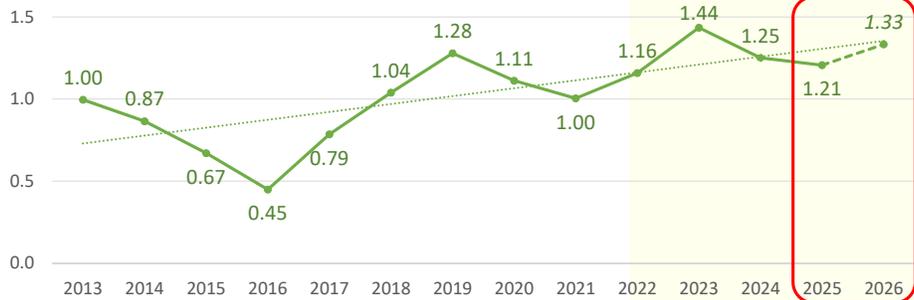


Source: based on data of the State Statistic Service of Ukraine

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RAPSEED PRODUCTION IN UKRAINE

RAPSEED AREA,
million hectares

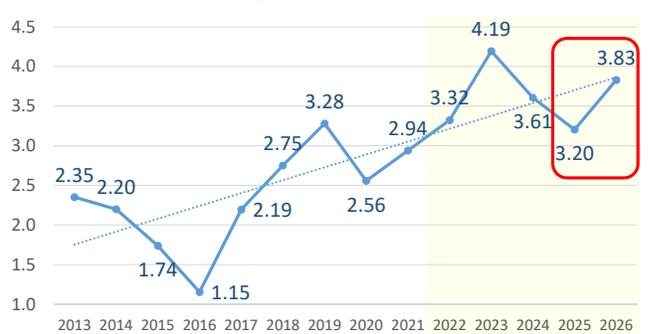


- Winter rapeseed
1,099.8 K ha
- Spring rapeseed
233 K ha

YIELDS, tonnes per hectare



TOTAL, million metric tonnes

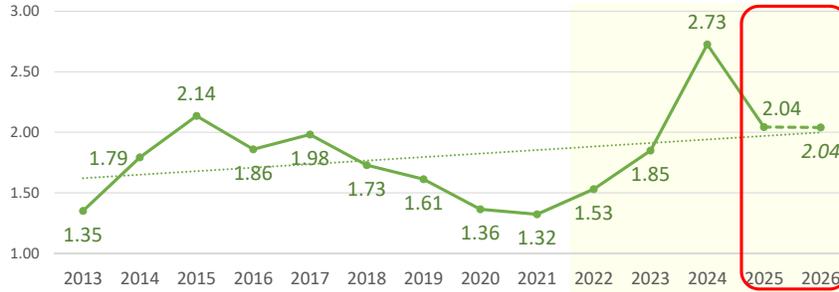


Source: based on data of the State Statistic Service of Ukraine

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SOYBEAN PRODUCTION IN UKRAINE

SOYBEAN AREA, million hectares



YIELDS, tonnes per hectare



TOTAL, million metric tonnes

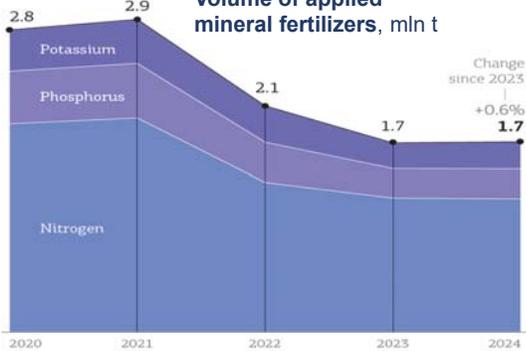


Source: based on data of the State Statistic Service of Ukraine

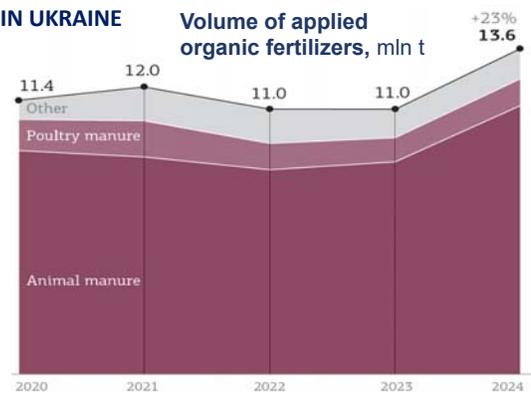
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APPLICATION OF FERTILIZERS IN UKRAINE

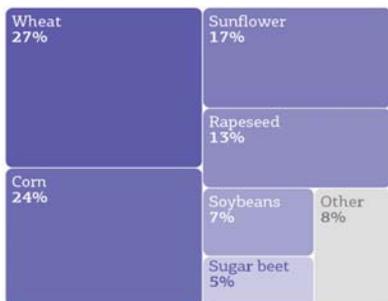
Volume of applied mineral fertilizers, mln t



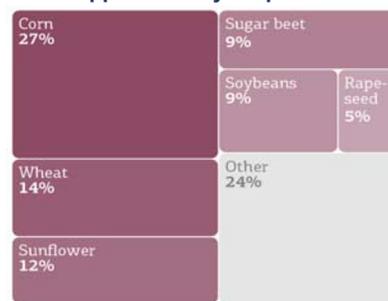
Volume of applied organic fertilizers, mln t



Application by crops in 2024



Application by crops in 2024

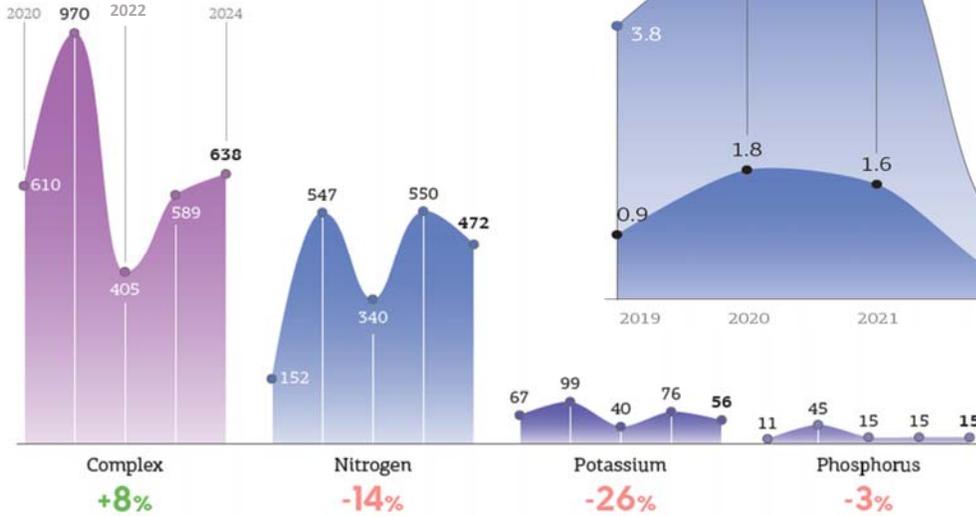


Sources: Agribusiness of Ukraine 2024/25, State Statistic Service of Ukraine

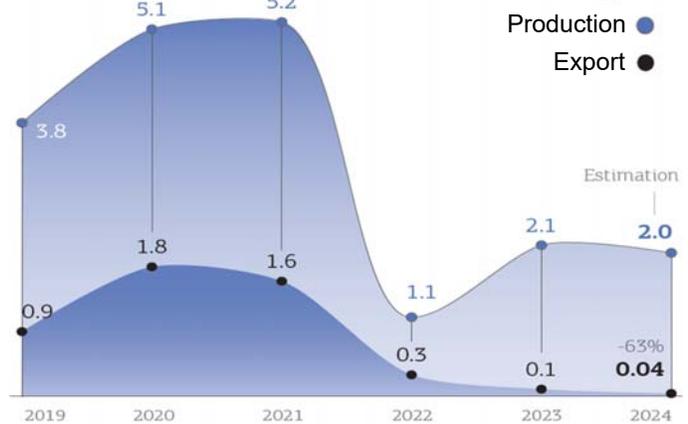
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PRODUCTION AND TRADE OF FERTILIZERS IN UKRAINE

Import of mineral fertilizers, USD mln



Production and export of nitrogen fertilizers in Ukraine, mln t



Sources: Agribusiness of Ukraine 2024/25, State Statistic Service of Ukraine

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SEED PRODUCTION AND TRADE IN UKRAINE

Volume of certified seeds, thou. t



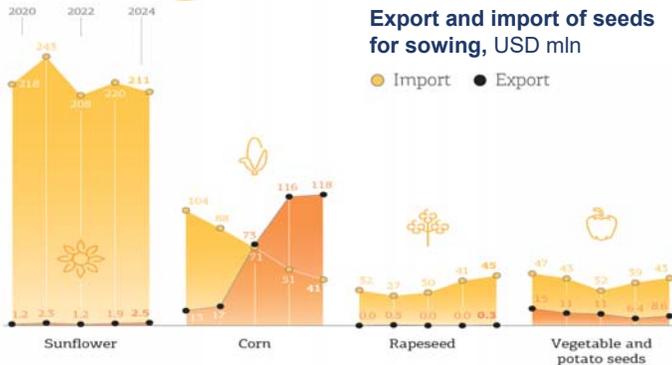
Number of certificates, thou. units



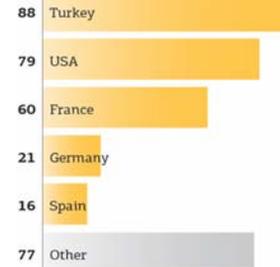
Seed production, thou. t



Export and import of seeds for sowing, USD mln



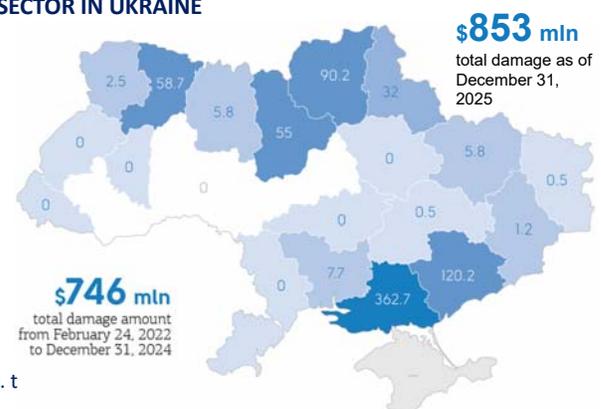
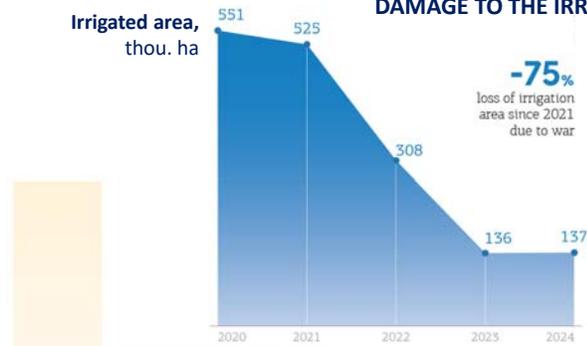
Top countries of seed import, USD mln



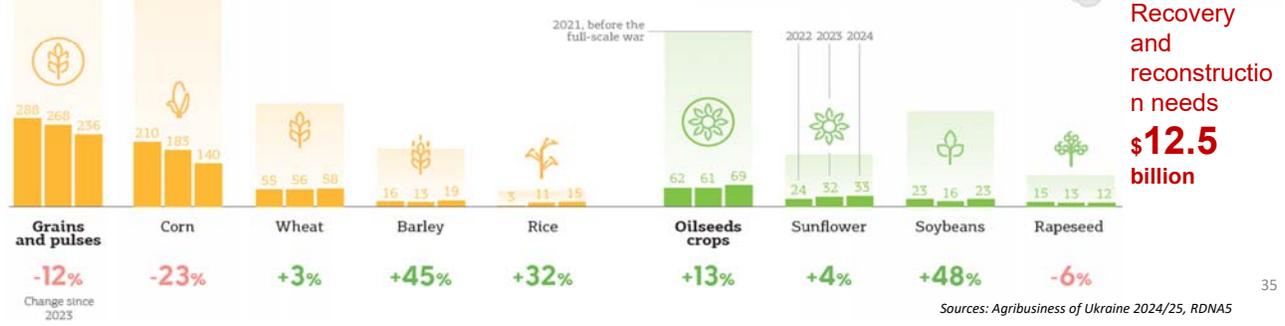
Sources: Seed Association of Ukraine, State Statistic Service of Ukraine

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DAMAGE TO THE IRRIGATION SECTOR IN UKRAINE

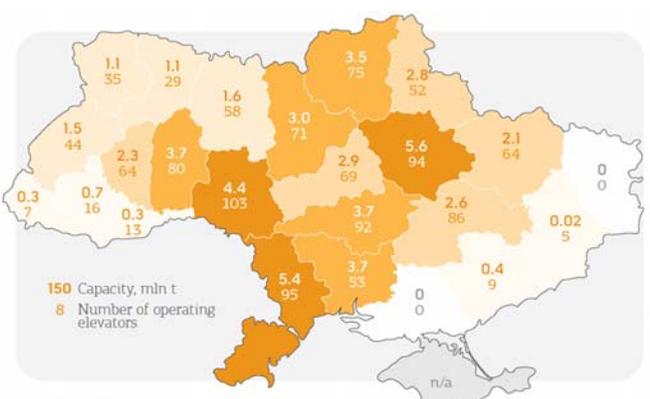


Crop production on irrigated lands, thou. t



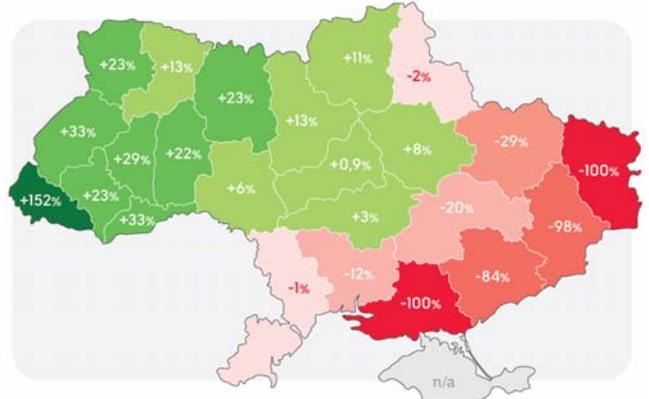
GRAIN STORAGE FACILITIES IN UKRAINE

Elevator capacity, as of October 2025, mln t



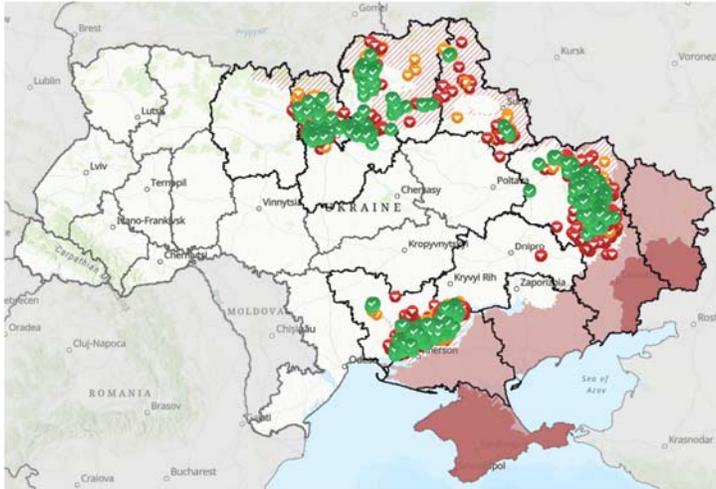
52.9 mln t Simultaneous storage capacity
1.2 thou. Number of elevators
+1.5% Storage capacity growth over the year

Dynamics of elevator capacities Change as of October 2025 compared to 2022



-8.3% Capacity change since the start of the invasion
-4.8 mln t Decrease in elevator capacities
-136 Decrease in the number of elevators

UKRAINE DEMINING



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



Type of hazardous areas identified by NTS

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

Oblasts with a focus on MA



17.4 mln ha

Territory affected by hostilities

4.2 mln ha

Cleared through demining or non-technical survey
0.64 mln ha in 2025

27.6 us\$ million

Total need for land clearance (2026-2035)
Reduced from 29.8 US\$ billion estimated in 2025

134

certified demining operators

298

demining machines

Agricultural land cleared Returned to cultivation

2023 **274** thous. ha

208 thous. ha

2024 **318** thous. ha

285 thous. ha

2025 **406** thous. ha

157 thous. ha (as of July 1, 2025)

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

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BALANCE OF SUPPLY AND DEMAND OF GRAIN IN UKRAINE

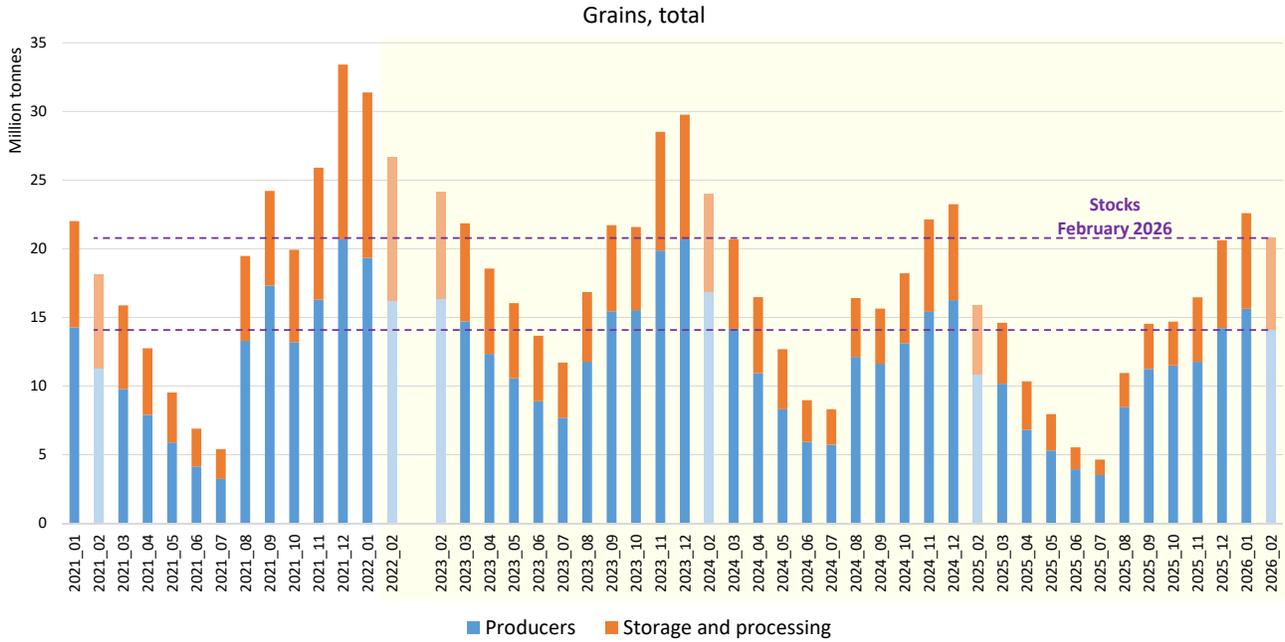
*forecast as of March 6, 2026

	2024/25	2025/26*	2026/27**	Deviation, %	
	thousand tonnes	thousand tonnes	thousand tonnes	2025/26* to 2024/25	2026/27** to 2025/26*
Initial stocks	4,732	7,240	11,422	+ 53.0 %	+ 57.8 %
Sown area, thousand hectares	11,161	11,879	11,648	+ 6.4 %	- 1.9 %
Harvested area, thousand hectares	11,130	11,543	11,172	+ 3.7 %	- 3.2 %
Yield, tonnes / hectare	5.07	5.29	5.24	+ 4.3 %	- 0.9 %
Gross harvest	56,431	61,058	58,569	+ 8.2 %	- 4.1 %
Import	124	106	115	- 15.1 %	+ 9.0 %
Total supply	61,287	68,403	70,105	+ 11.6 %	+ 2.5 %
Domestic consumption:	15,767	16,799	16,766	+ 6.5 %	- 0.2 %
food	3,528	3,298	3,130	- 6.5 %	- 5.1 %
fodder	8,485	9,835	9,880	+ 15.9 %	+ 0.5 %
seeds	1,562	1,477	1,549	- 5.4 %	+ 4.9 %
losses	1,497	1,353	1,395	- 9.6 %	+ 3.1 %
other (alcohol, malt, starch, etc.)	695	836	812	+ 20.4 %	- 2.9 %
Export	38,281	40,183	41,962	+ 5.0 %	+ 4.4 %
Total distribution (demand)	54,048	56,982	58,728	+ 5.4 %	+ 3.1 %
Ending stocks	7,240	11,422	11,378	+ 57.8 %	- 0.4 %
Ratio of ending stocks to distribution	13%	20%	19%		

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

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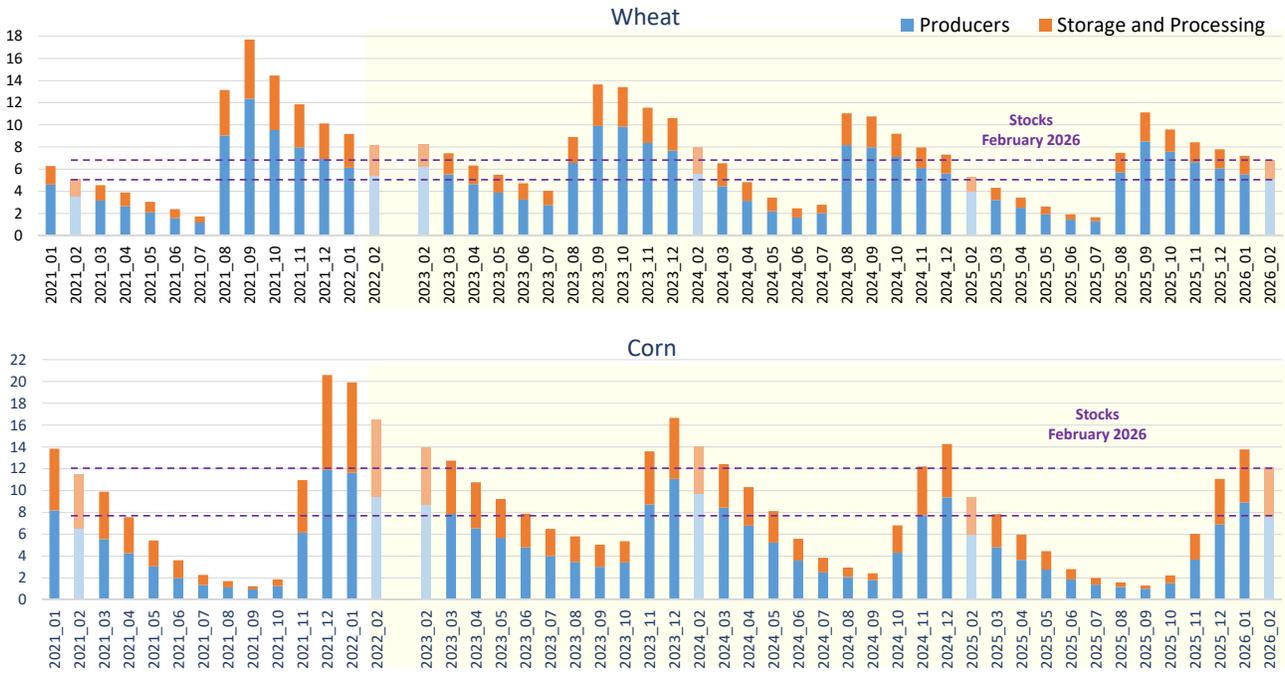
UKRAINE: STOCKS OF AGRICULTURAL PRODUCTS AS OF THE 1ST DAY OF THE MONTH, million tonnes



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

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UKRAINE: STOCKS OF AGRICULTURAL PRODUCTS AS OF THE 1ST DAY OF THE MONTH, million tonnes



40

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

*forecast as of March 4, 2026

	2024/25	2025/26*	2026/27**	Deviation , %	
	thousand tonnes	thousand tonnes	thousand tonnes	2025/26* to 2024/25	2026/27** to 2025/26*
Initial stocks	232.6	377.7	263.8	+ 62.4 %	- 30.2 %
Sown area, thousand hectares	10,165.0	9,530.0	9,730.0	- 6.2 %	+ 2.1 %
Harvested area, thousand hectares	9,954.6	8,929.2	9,390.8	- 10.3 %	+ 5.2 %
Yield, tonnes / hectare	2.38	2.20	2.45	- 7.4 %	+ 11.0 %
Gross harvest	23,690.4	19,673.6	22,972.5	- 17.0 %	+ 16.8 %
Import	27.4	30.8	30.2	+ 12.3 %	- 1.9 %
Total supply	23,950.4	20,082.1	23,266.5	- 16.2 %	+ 15.9 %
Domestic consumption:	16,197.5	15,323.3	17,641.1	- 5.4 %	+ 15.1 %
processing for oil	15,548.5	14,840.0	17,140.0	- 4.6 %	+ 15.5 %
seeds	267.6	265.9	262.6	- 0.6 %	- 1.2 %
other	63.4	66.8	63.9	+ 5.4 %	- 4.3 %
losses	318.0	150.6	174.5	- 52.6 %	+ 15.9 %
Export	7,375.2	4,495.0	5,355.0	- 39.1 %	+ 19.1 %
Total distribution (demand)	23,572.7	19,818.3	22,996.1	- 15.9 %	+ 16.0 %
Ending stocks	377.7	263.8	270.4	- 30.2 %	+ 2.5 %
Ratio of ending stocks to distribution	1.6%	1.3%	1.2%		

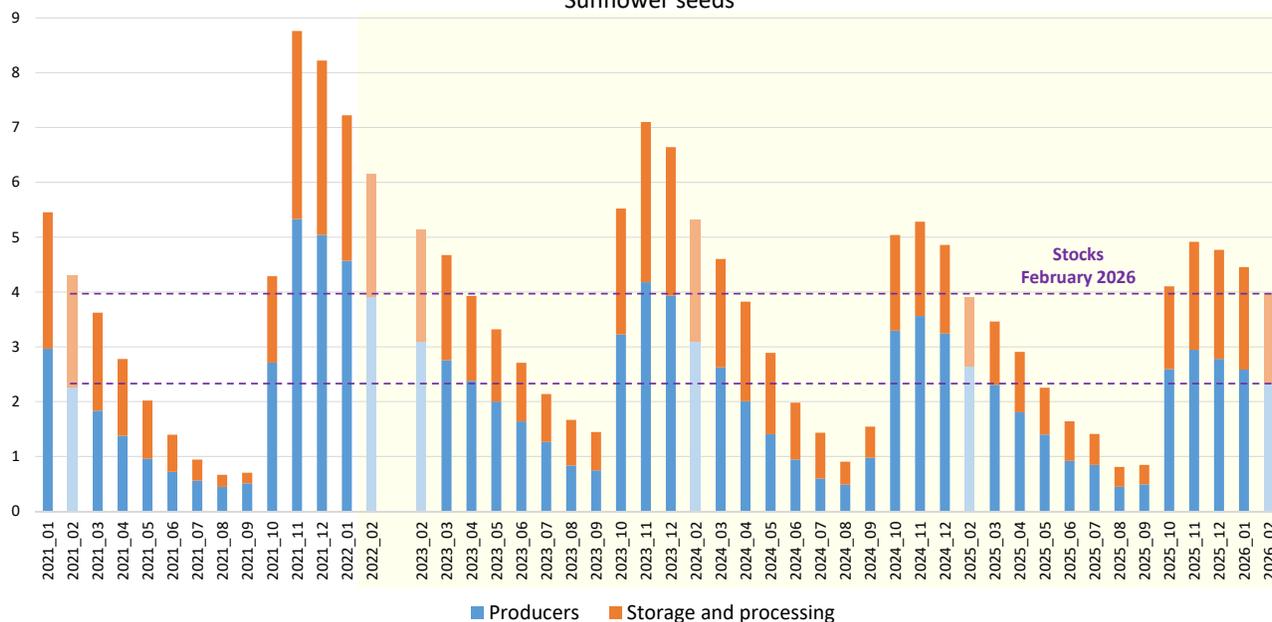
Note: MY September-August

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

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UKRAINE: STOCKS OF AGRICULTURAL PRODUCTS AS OF THE 1ST DAY OF THE MONTH, million tonnes

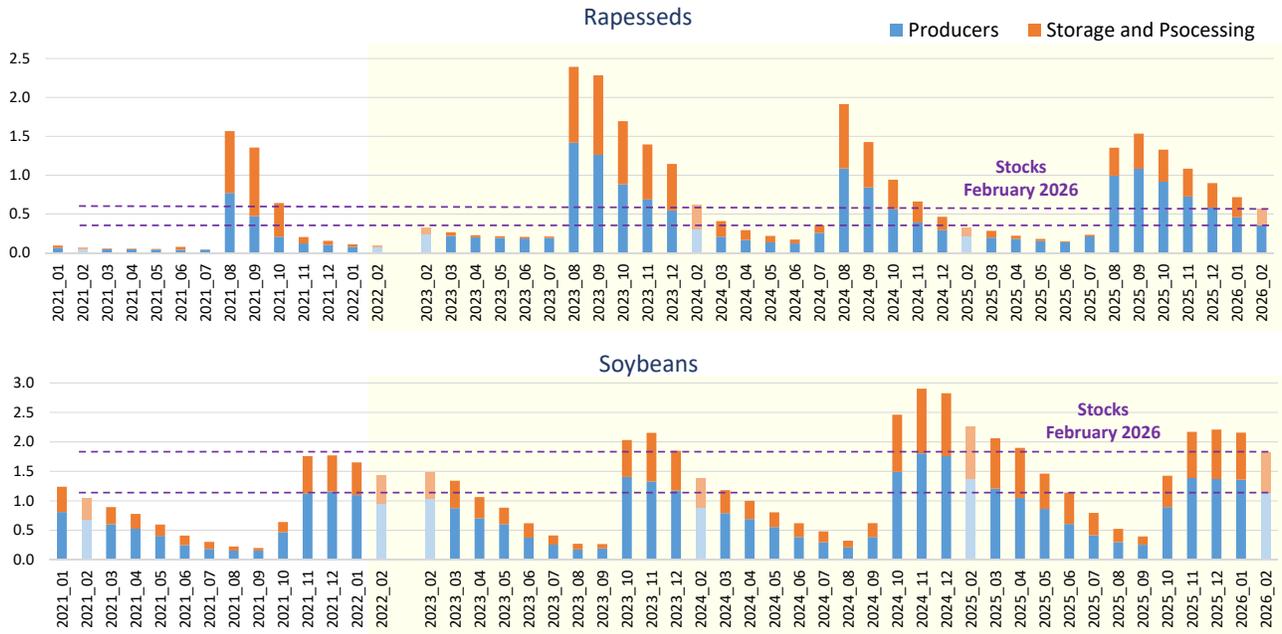
Sunflower seeds



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

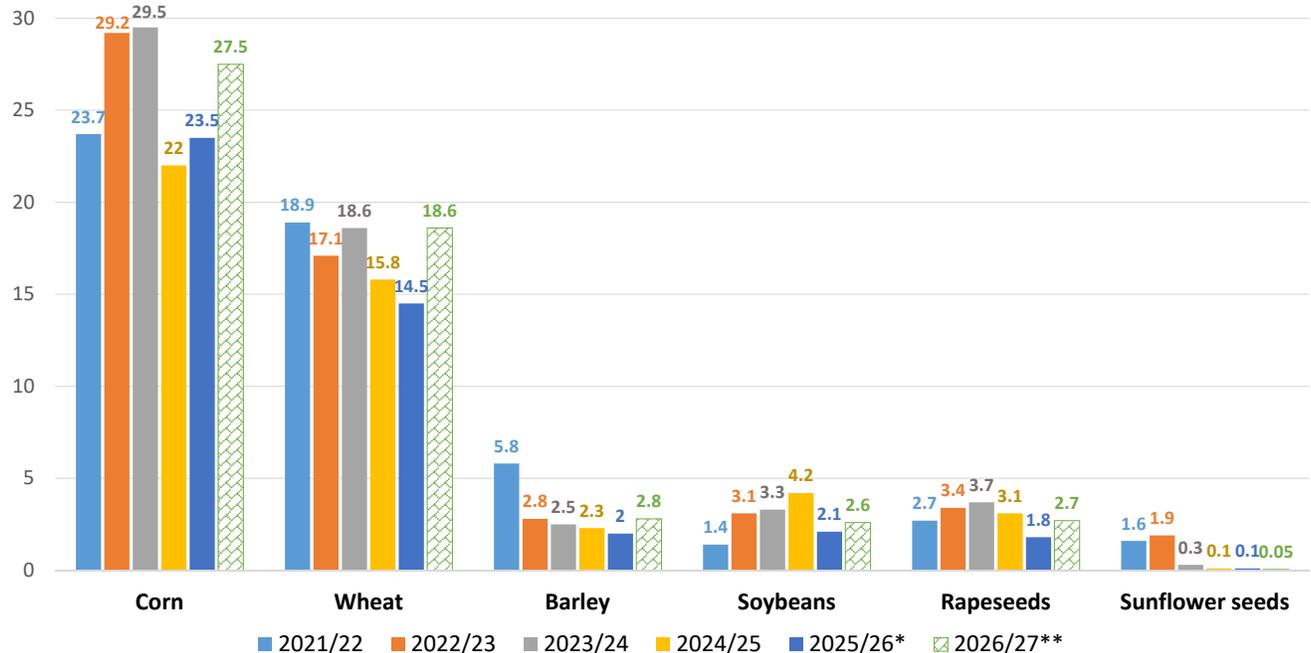
42

UKRAINE: STOCKS OF AGRICULTURAL PRODUCTS AS OF THE 1ST DAY OF THE MONTH, million tonnes



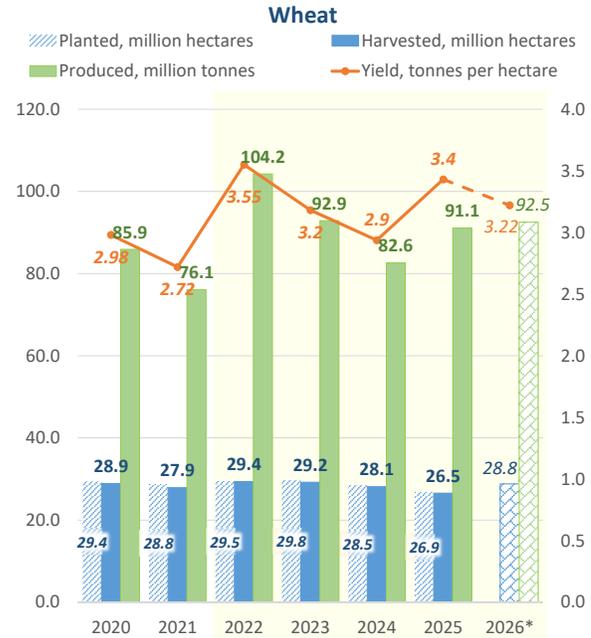
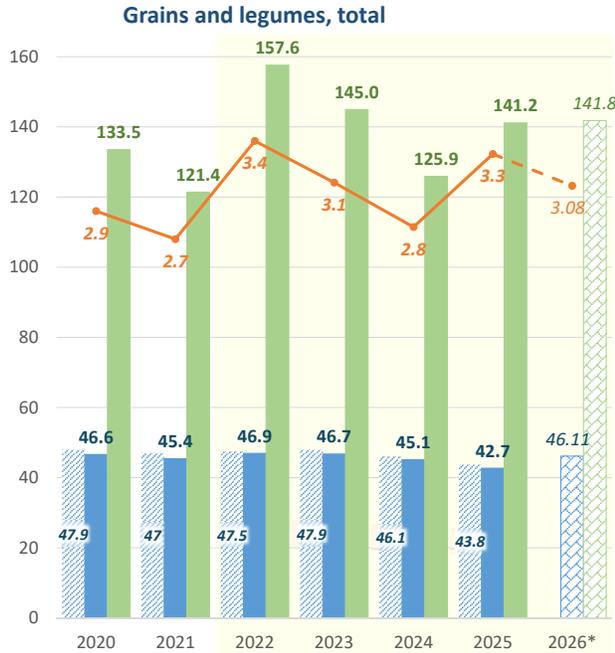
Source: based on "APK-Inform", the State Statistic Service of Ukraine and the State Customs Service of Ukraine

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



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

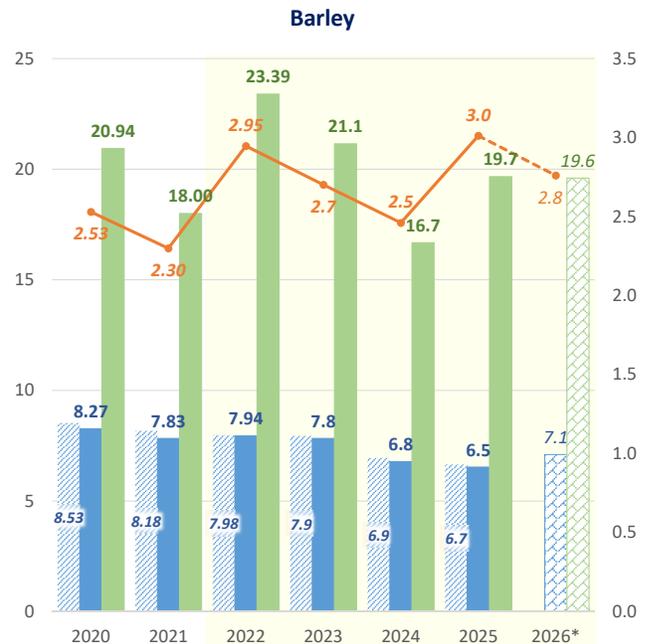
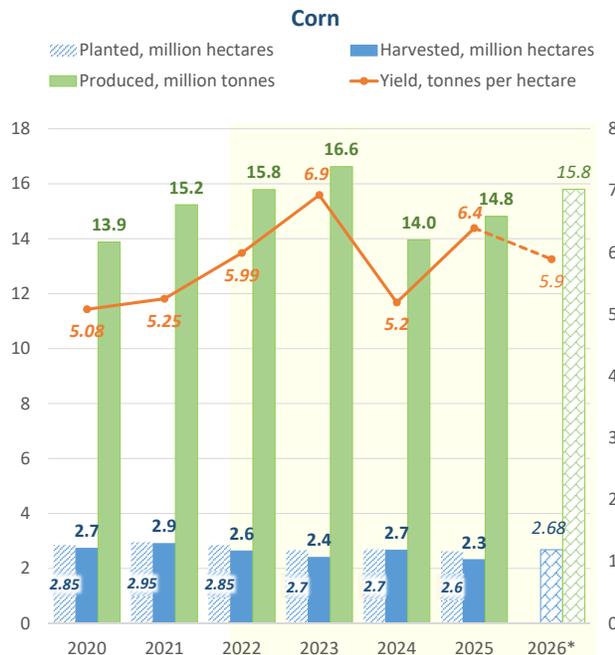
GRAIN AND LEGUMES PRODUCTION IN RUSSIA



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

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GRAIN AND LEGUMES PRODUCTION IN RUSSIA



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

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BALANCE OF SUPPLY AND DEMAND OF GRAIN IN RUSSIA

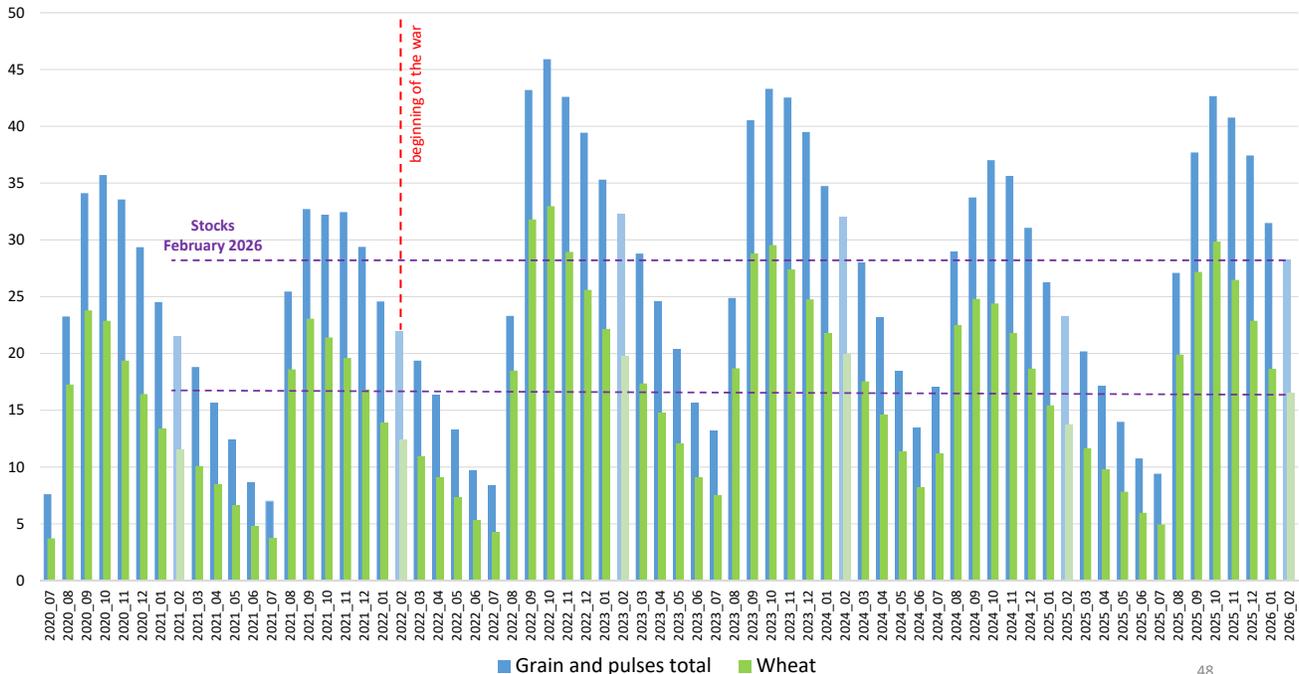
*forecast as of March 13, 2026

	2021/22	2022/23	2023/24	2024/25	2025/26*	Deviation, %	
	thousand tonnes	2024/25 to 2023/24	2025/26* to 2024/25				
Initial stocks	23,104	30,433	56,332	51,232	41,038	-9.1 %	-19.9 %
Sown area, thousand hectares	47,007	47,504	47,894	46,096	43,753	-3.7 %	-5.1 %
Harvested area, thousand hectares	47,504	46,880	46,709	45,113	42,683	-3.4 %	-5.4 %
Yield, tonnes / hectare	2.56	33.6	31.0	27.9	33.1	-10.1 %	+18.5 %
Gross harvest	121,399	157,615	144,956	125,883	141,152	-13.2 %	+12.2 %
Import	264	178	153	147	127	-4.1 %	-13.9 %
Total supply	144,768	188,226	201,442	177,262	182,317	-12.0 %	+2.9 %
Domestic consumption:							
food	80,634	84,330	86,632	84,687	85,824	-2.2 %	+1.3 %
fodder	18,130	18,590	19,155	18,137	18,075	-5.3 %	-0.3 %
seeds	43,690	45,565	47,450	47,670	48,540	+0.5 %	+1.8 %
losses	10,321	10,145	9,939	9,487	9,955	-4.5 %	+4.9 %
other (alcohol, malt, starch, etc.)	3,695	4,790	4,934	4,281	4,440	-13.2 %	+3.7 %
Export	4,798	5,240	5,154	5,042	4,814	2.2 %	4.5 %
Export	34,058	47,564	63,578	51,537	54,157	-18.9 %	+5.1 %
Total distribution (demand)	114,695	131,894	150,210	136,224	139,981	-9.3 %	+2.8 %
Ending stocks	30,433	56,332	51,232	41,038	42,336	-19.9 %	+3.2 %
Ratio of ending stocks to distribution	26%	43%	34%	30%	30%		

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

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



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

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Wheat export dynamic from Russia, thsd tonnes

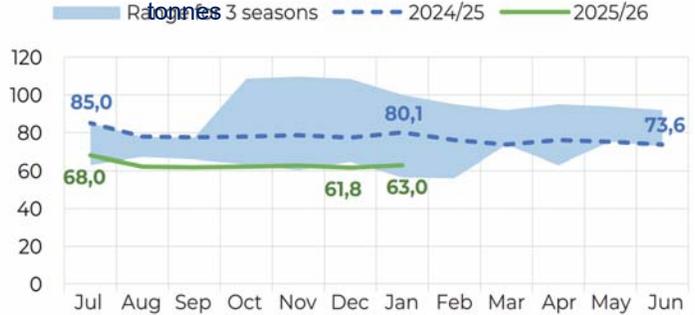


Grain exports forecast MY 2025/26*

Total 54.2 MT (+5% compared to the 2024/25 MY), of which:

- wheat - 45.0 MT (+6%),
- barley - 4.5 MT (+14%),
- corn - 2.5 MT (-6%).

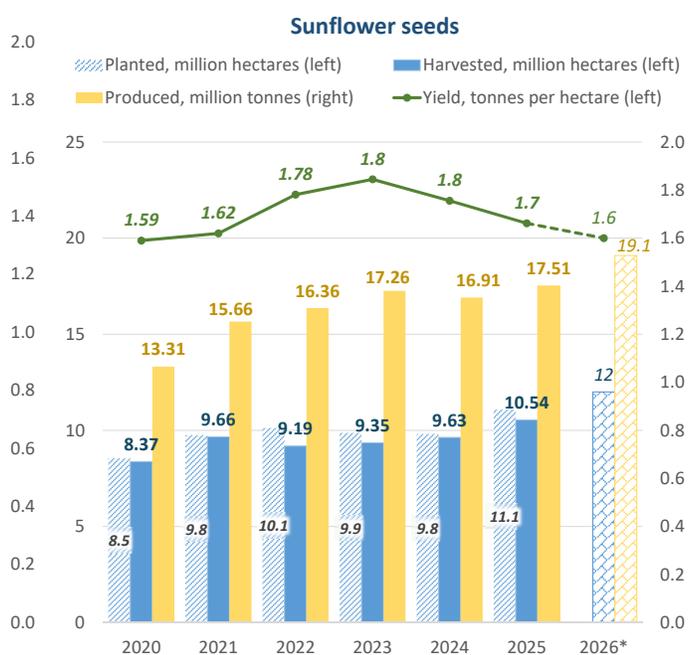
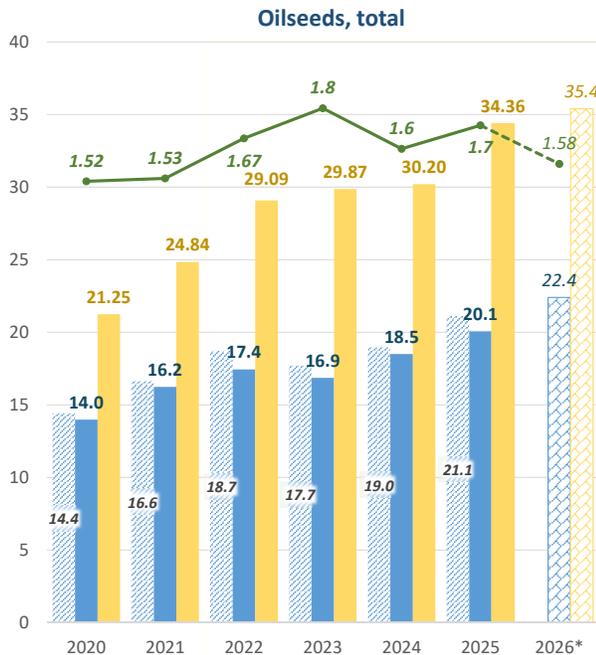
Flour export dynamic from Russia, thsd tonnes



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

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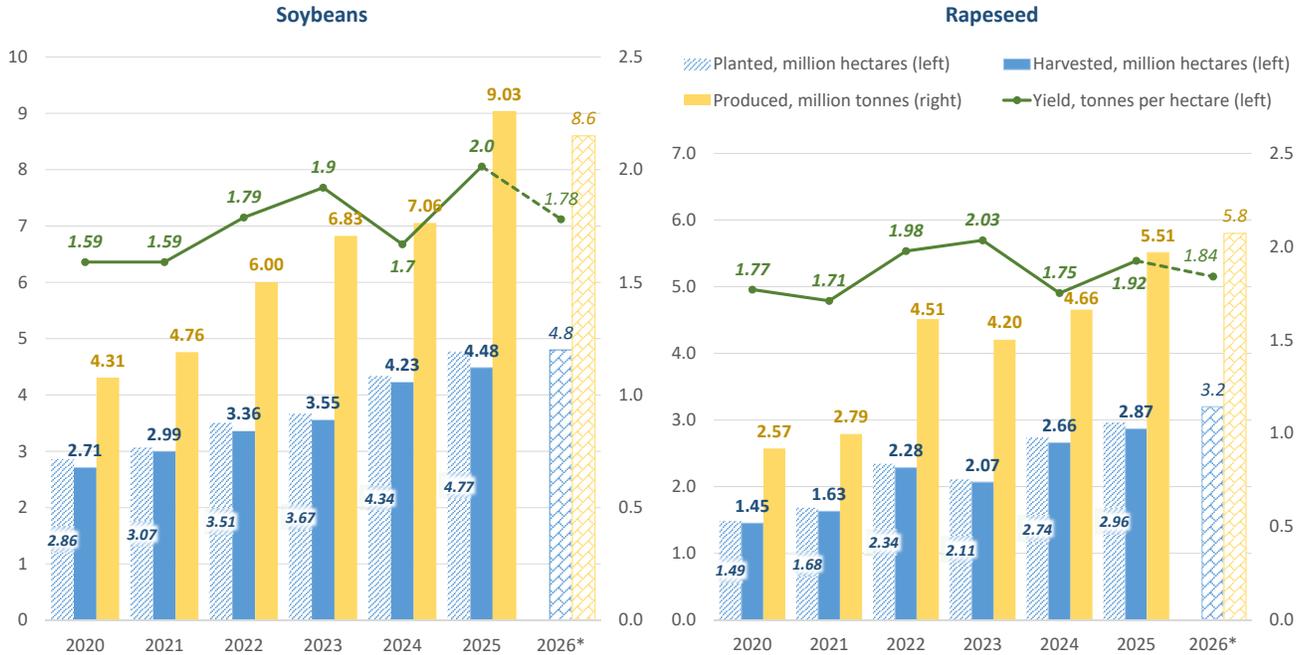
OIL CROP PRODUCTION IN RUSSIA



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

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OIL CROP PRODUCTION IN RUSSIA



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

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

*forecast as of March 13, 2026

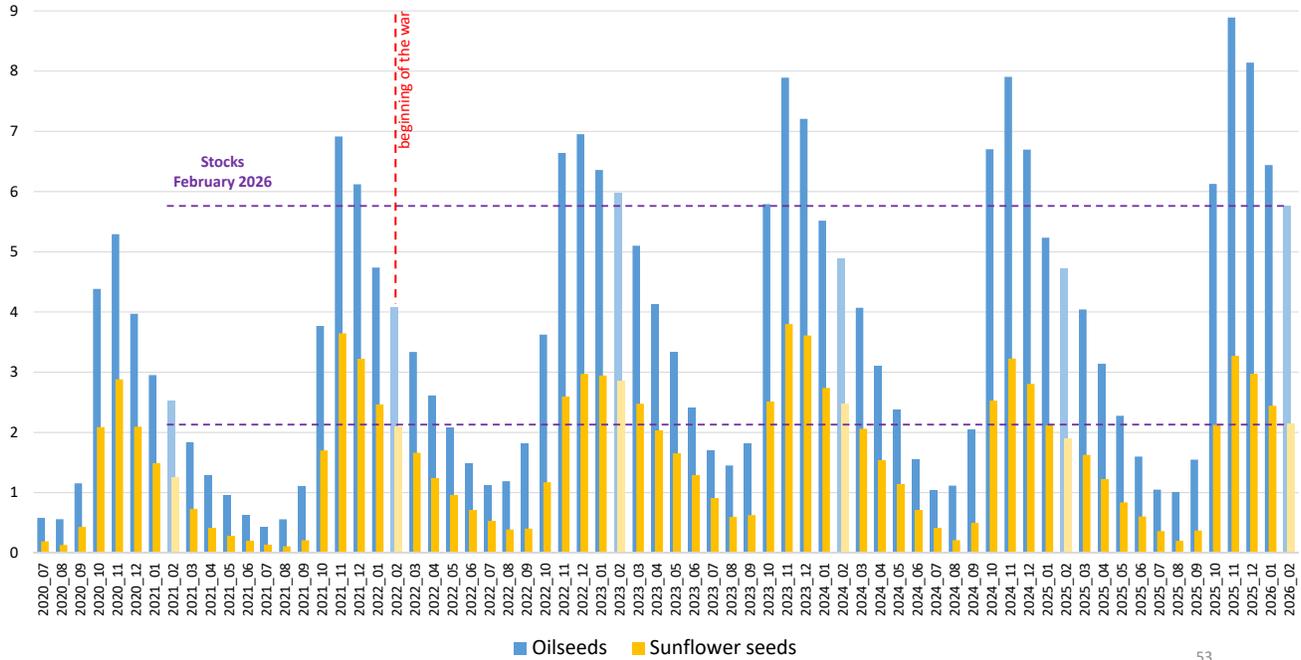
	2022/23	2023/24	2024/25	2025/26*	2026/27**	Deviation, %	
	thousand tonnes	2025/26* to 2024/25	2026/27** to 2025/26*				
Initial stocks	2,256.5	1,103.8	755.4	528.7	478.0	-30.0 %	-9.6 %
Sown area, thousand hectares	16,432.0	16,290.0	17,421.0	18,825.0	18,960.0	+8.1 %	+0.7 %
Harvested area, thousand hectares	15,453.0	15,857.6	16,729.8	17,776.0	18,009.2	+6.3 %	+1.3 %
Yield, tonnes / hectare	1.85	1.89	1.76	1.80	1.84	+1.9 %	+2.1 %
Gross harvest	28,537.5	29,924.6	29,501.3	31,937.3	33,051.3	+8.3 %	+3.5 %
Import	1,057.6	2,162.4	1,722.6	1,222.0	1,734.4	-29.1 %	+41.9 %
Total supply	31,851.5	33,190.8	31,979.3	33,688.0	35,263.7	+5.3 %	+4.7 %
Domestic consumption:	27,780.0	29,980.0	29,653.1	30,600.0	32,500.0	+3.2 %	+6.2 %
processing for oil	26,888.5	28,999.9	28,570.5	29,366.2	31,170.8	+2.8 %	+6.1 %
seeds	511.1	605.0	657.5	659.5	678.9	-0.3 %	+2.9 %
other	100.3	43.2	105.4	78.2	189.7	-23.0 %	up 2,4 t.
losses	318.6	331.9	319.8	496.2	460.6	+55.2 %	-7.2 %
Export	2,929.2	2,455.4	1,797.4	2,610.0	2,280.0	+45.2 %	-12.6 %
Total distribution (demand)	30,747.7	32,435.4	31,450.5	33,210.0	34,780.0	+5.6 %	+4.7 %
Ending stocks	1,103.8	755.4	528.7	478.0	483.7	-9.6 %	+1.2 %
Ratio of ending stocks to distribution	3.7%	2.3%	1.7%	1.4%	1.4%		

Note: MY September-August

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

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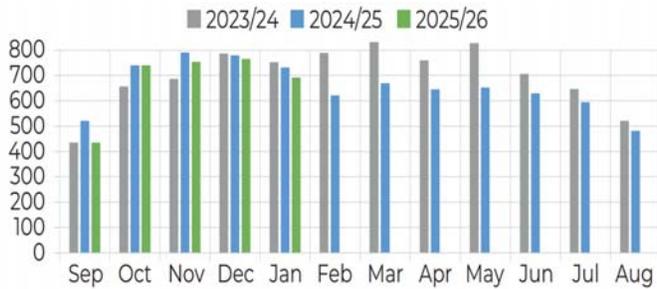
DYNAMICS OF OILSEEDS STOCKS IN RUSSIA (ag enterprises), million tonnes



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

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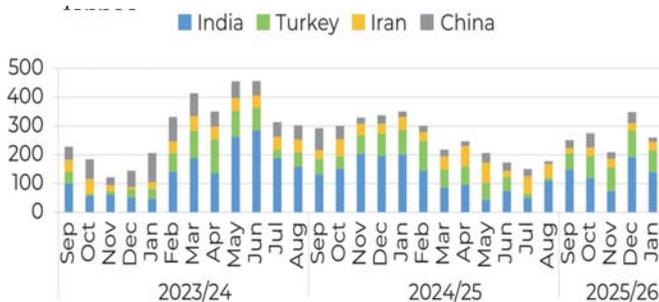
Sunflower oil production dynamics in Russia, thsd



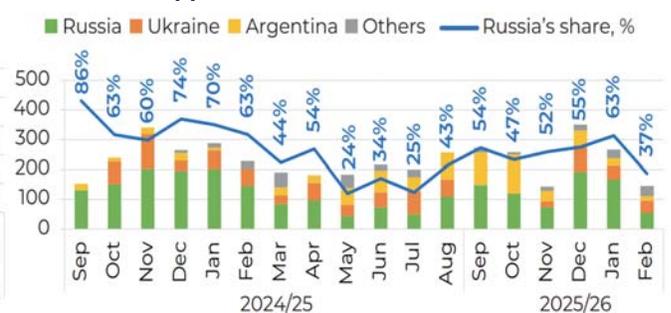
Sunflower oil export from Russia, thsd



Key sales markets for Russian sunflower oil, thsd



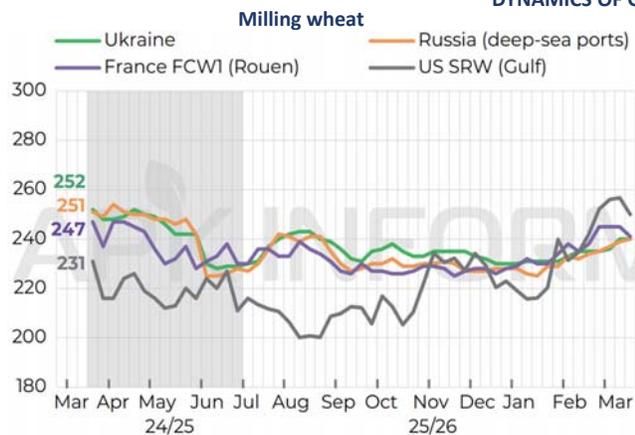
Main suppliers of sunflower oil to India, thsd tonne



Source: International Trade Center, SEA, APK-

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DYNAMICS OF GRAIN PRICES, USD/t

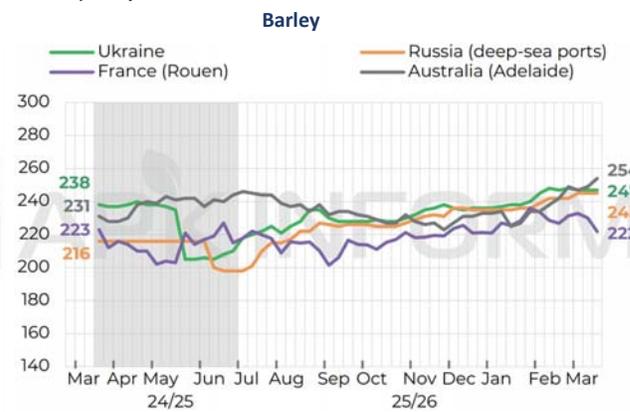
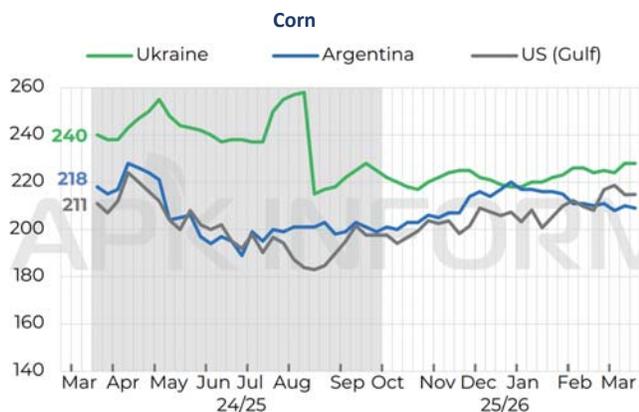


	Stock / month	Country of origin	Terms of delivery	Mar 20	Mar 13	Mar 6	Feb 27	Feb 20	Last weekly change	
									USD/t	%
Futures market										
Wheat	CBOT, May	USA	EXW	218.7	225.5	226.6	217.3	210.7	-6.8	-3.0%
Milling wheat	Euronext, May	France	CPT Rouen	233.9	242.8	241.4	237.9	232.1	-8.9	-3.7%
Wheat	LIFFE, May	EU	EXW	228.3	233.2	229.0	223.3	221.9	-4.9	-2.1%
Wheat	BCA, July	Argentina	EXW	210.0	207.5	191.1	188.0	188.5	+2.5	+1.2%
Wheat SRW	Mar	USA	CPT Gulf of Am.	250.0	256.7	256.0	252.2	242.0	-6.7	-2.6%
Wheat hard	Mar	Argentina	FOB	218.0	214.0	212.0	211.0	205.0	+4.0	+1.9%
Milling wheat	Mar	France	FOB	241.0	243.0	245.0	245.0	238.0	-4.0	-1.6%

Source: APK-inform

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DYNAMICS OF GRAIN PRICES, USD/t



	Stock / month	Country of origin	Terms of delivery	Mar 20	Mar 13	Mar 6	Feb 27	Feb 20	Last weekly change	
									USD/t	%
Futures market										
Corn yellow	CBOT, May	USA	EXW	183.2	183.9	181.3	176.5	168.3	-0.7	-0.4%
Corn	Euronext, Jun	France	FOB	239.4	244.6	238.5	253.2	225.9	-5.2	-2.1%
Corn hard	BCA, Apr	Argentina	EXW	184.4	186.8	183.2	184.5	183.4	-2.4	-1.3%
Cash market										
Corn yellow	Mar	USA	CPT Gulf of Am.	214.8	214.7	218.7	216.8	208.1	+0.1	0.0%
Corn	Mar	France	FOB	-	250.3	241.4	242.0	236.8	-	-
Corn	Mar	Argentina	FOB	209.0	210.0	208.0	211.0	210.0	-1.0	-0.5%
Fodder barley	Mar	France	FOB	221.9	230.1	232.7	231.4	226.8	-8.2	-3.6%

Source: APK-inform

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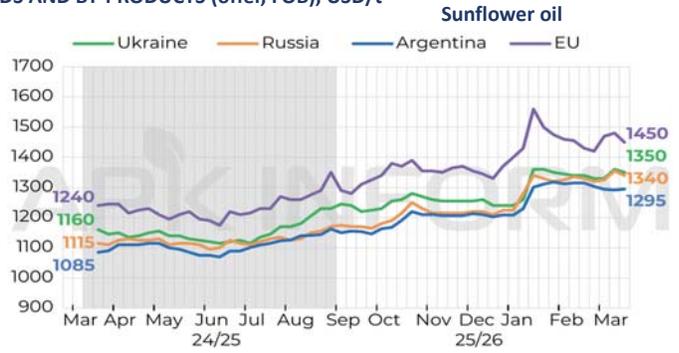
PRICES DYNAMICS OF OILSEEDS AND BY-PRODUCTS (offer, FOB), USD/t

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

	min	weekly change	max	weekly change	average	weekly change
Offer, FOB, USD/t (Mar-Apr)						
Crude SFO	1345		1365	-10	1350	-10
Bid, FOB, USD/t (Mar-Apr)						
Crude SFO	1330		1350	-10	1340	-5
Bid, CPT, USD/t						
Crude SFO	1285	-5	1310		1295	-5
Sunflower meal	216		223		220	
Soybeans	443	-2	458	-2	452	-1
Rapeseed	550	3	560	5	555	2
Sunflower seed	620	-10	640	-10	635	-5
Offer, DAP-border, USD/t						
Crude SFO	1300		1320		1310	-5
Sunflower meal	220		235	-3	233	
Bid, DAP-border, USD/t						
Crude SFO	1295		1315		1305	-7
Sunflower meal	218		233	-2	230	
Soybeans	445		455	-3	450	
Rapeseed	550		560		555	
Soybean meal	360		375	-10	370	-5

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

	min	weekly change	max	weekly change	average	weekly change
Offer, FOB, USD/t (Mar-Apr)						
Crude SFO	1310	-20	1345	-25	1340	-15
Sunflower meal	210		225		220	
Bid, FOB, USD/t (Mar-Apr)						
Crude SFO	1320		1330	-5	1325	-5
Sunflower meal	190		210		195	
Offer, FOB, USD/t (May-Jul)						
Crude SFO	1265	-5	1295	10	1280	5



Source: APK-inform

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