



**Intesco
Research
Group**

MARKET OF GRAIN CROPS



MOSCOW 2011

CONTENTS

TABLE OF CONTENTS.....	Ошибка! Закладка не определена.
MARKETING RESEARCH METHODOLOGY	Ошибка! Закладка не определена.
EXTRACTS FROM RESEARCH.....	Ошибка! Закладка не определена.
LIST OF GRAPHS, DIAGRAMS, TABLES AND SCHEMES.....	16
INFORMATION ABOUT "INTESCO RESEARCH GROUP" COMPANY	26

TABLE OF CONTENTS

MARKET RESEARCH METHODOLOGY

LIST OF GRAPHS, DIAGRAMS AND TABLES

1. PARAMETERS OF RUSSIAN CONSUMERS

1.1. Dynamics of the population size

1.2. Dynamics of social standard of living

2. RESEARCH SUBJECT

2.1. Food crops

Wheat

Rye

Triticale

2.2. Cereal crops

Rice

Buckwheat

Millet

2.3. Forage crops

Corn

Sorghum

Oat

Barley

3. WORLD MARKET OF GRAIN CROPS

3.1. The largest countries of grain crops production

The largest producer countries' production volume

World production structure by largest countries

3.2. Main countries importing grain crops

Volumes of production imported to main importing countries

World import structure by main countries

3.3. Main countries exporting grain crops

Volumes of production exported to main exporting countries

World import structure by main countries

3.4. The largest countries consuming grain crops

Consumption rates of the largest countries

World consumption structure by largest countries

3.5. Trends on the world market of grain crops

4. GRAIN CROPS ACREAGE IN RUSSIA

4.1. Dynamics of grain crops acreage

4.2. Acreage structure by kinds of grain crops

4.2. Geography of grain crops acreage location by federal districts of RF

4.3. Geography of grain crops acreage location by regions of RF

5. GRAIN CROPS YIELD IN RUSSIA

5.1. Dynamics of grain crops yield

5.2. RF regions with the highest indices of grain crops yield

5.3. RF regions with the lowest indices of grain crops yield

6. TOTAL YIELD OF GRAIN CROPS IN RUSSIA

6.1. Dynamics of total yield of grain crops

6.2. Total yield structure by kinds of grain crops

6.3. Total yield structure by kinds of grain crops by federal districts of RF

6.4. Regional structure of total yield of grain crops

7. TOTAL YIELD OF WHEAT IN RUSSIA

7.1. Dynamics of total yield of wheat

7.2 Total yield structure by kinds of wheat

7.3. Total yield structure by kinds of wheat by federal districts of RF

7.4. Regional structure of total yield of wheat

8. TOTAL YIELD OF BARLEY IN RUSSIA

8.1. Dynamics of total yield of barley

8.2. Total yield structure by kinds of barley

8.3. Total yield structure by kinds of barley by federal districts of RF

8.4. Regional structure of total yield of barley

9. BALANCE OF SUPPLY AND DEMAND FOR GRAIN CROPS IN RUSSIA

9.1. Indices of grain crops balance in dynamics

9.2. Structure of grain crops supply

9.3. Structure of grain crops demand

10. GOVERNMENT REGULATION OF THE GRAIN CROPS MARKET

11. GRAIN CROPS EXPORT ANALYSIS

11.1. Grain crops (in total)

Export volume dynamics by years

Export volume dynamics by months

Export structure by kinds of grain crops

Export dynamics by largest countries of destination

Export structure by largest countries of destination

11.2. Wheat

Export volume dynamics by years

Export structure by largest countries of destination

11.3. Barley

Export volume dynamics by years

Export structure by largest countries of destination

11.4. Oat

Export volume dynamics by years

Export structure by largest countries of destination

11.5. Rye

Export volume dynamics by years

Export structure by largest countries of destination

11.6. Corn

Export volume dynamics by years

Export structure by largest countries of destination

11.7. Buckwheat

Export volume dynamics by years

Export structure by largest countries of destination

11.8. Millet

Export volume dynamics by years

Export structure by largest countries of destination

12. GRAIN CROPS IMPORT ANALYSIS

12.1. Grain crops (in total)

Import volume dynamics by years

Import volume dynamics by months

Import structure by kinds of grain crops

Import dynamics by largest countries of supply

Import structure by largest countries of supply

12.2. Wheat

Import volume dynamics by years

Import structure by countries of supply

12.3. Oat

Import volume dynamics by years

Import structure by countries of supply

12.4. Corn

Import volume dynamics by years

Import structure by countries of supply

12.5. Rice

Import volume dynamics by years

Import structure by countries of supply

13. PRODUCER PRICES FOR GRAIN CROPS

13.1. Grain crops

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.2. Wheat

Market of Grain Crops. Current Situation and Forecasts

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.3. Soft wheat

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.4. Soft wheat of Class 3 (milling wheat)

Dynamics of average producer prices by months

13.5. Soft wheat of Class 4 (milling wheat)

Dynamics of average producer prices by months

13.6. Soft wheat of Class 5 (feed wheat)

Dynamics of average producer prices by months

13.7. Soft strong wheat (Classes 1 and 2)

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.8. Durum wheat

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.9. Food barley

Dynamics of average producer prices by months

13.10. Feed barley

Dynamics of average producer prices by months

13.11. Milling rye

Dynamics of average producer prices by months

13.12. Feed rye

Dynamics of average producer prices by months

13.13. Buckwheat

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.14. Millet

Market of Grain Crops. Current Situation and Forecasts

Dynamics of average producer prices by years

Dynamics of average producer prices by months

13.15. Oat

Dynamics of average producer prices by years

Dynamics of average producer prices by months

14. PRICES OF ACQUISITION OF GRAIN CROPS BY INDUSTRIAL ENTERPRISES

14.1. Wheat

Dynamics of average prices of acquisition by industrial enterprises by years

Dynamics of average prices of acquisition by industrial enterprises by months

14.2. Soft wheat

Dynamics of average prices of acquisition by industrial enterprises by months

14.3. Soft wheat of Class 3

Dynamics of average prices of acquisition by industrial enterprises by months

14.4. Soft wheat of Class 4

Dynamics of average prices of acquisition by industrial enterprises by months

14.5. Soft wheat of Class 5

Dynamics of average prices of acquisition by industrial enterprises by months

14.6. Strong wheat (Classes 1 and 2)

Dynamics of average prices of acquisition by industrial enterprises by months

14.7. Durum wheat (grade and off-grade)

Dynamics of average prices of acquisition by industrial enterprises by months

14.8. Barley

Dynamics of average prices of acquisition by industrial enterprises by years

Dynamics of average prices of acquisition by industrial enterprises by months

14.9. Rye

Dynamics of average prices of acquisition by industrial enterprises by years

Dynamics of average prices of acquisition by industrial enterprises by months

14.10. Buckwheat

Dynamics of average prices of acquisition by industrial enterprises by years

Market of Grain Crops. Current Situation and Forecasts

Dynamics of average prices of acquisition by industrial enterprises by months

14.11. Millet

Dynamics of average prices of acquisition by industrial enterprises by years

Dynamics of average prices of acquisition by industrial enterprises by months

14.12. Corn

Dynamics of average prices of acquisition by industrial enterprises by years

Dynamics of average prices of acquisition by industrial enterprises by months

14.13. Oat

Dynamics of average prices of acquisition by industrial enterprises by years

Dynamics of average prices of acquisition by industrial enterprises by months

15. TRENDS ON THE RUSSIAN MARKET OF GRAIN CROPS

16. FORECAST OF DEVELOPMENT OF THE RUSSIAN GRAIN CROPS MARKET FOR CROP YEARS OF 2010/11 - 2011/12

16.1. Forecast for indices of the total yield and acreage of grain crops in Russia

16.2. Forecast for the balance of supply and demand for grain crops in Russia

INFORMATION ABOUT “INTESCO RESEARCH GROUP” COMPANY

MARKET RESEARCH METHODOLOGY

Subject of research:

MARKET OF GRAIN CROPS

Purpose of research:

EVALUATION OF STATE-OF-MARKET AND ITS DEVELOPMENT FORECASTS
FOR GRAIN YEARS OF 2010/11 - 2011/12

Region of research:

RUSSIA AND REGIONS OF RF
WORLD

Basic areas of research:

WORLD MARKET OF GRAIN CROPS
GRAIN CROPS ACREAGE IN RUSSIA
YIELD OF GRAIN CROPS IN RUSSIA
TOTAL YIELD OF GRAIN CROPS IN RUSSIA
BALANCE OF SUPPLY AND DEMAND FOR GRAIN CROPS IN RUSSIA
GRAIN CROPS EXPORT ANALYSIS
GRAIN CROPS IMPORT ANALYSIS
PRODUCER PRICES FOR GRAIN CROPS
PRICES OF ACQUISITION OF GRAIN CROPS BY INDUSTRIAL ENTERPRISES
FORECAST OF DEVELOPMENT OF RUSSIAN GRAIN CROPS MARKET FOR
CROP YEARS OF 2010/11 - 2011/12

Kinds of grain crops subjected to the research:

WHEAT
BARLEY
RYE
BUCKWHEAT
MILLET
CORN
OAT
RICE

Information sources used in the research:

Federal State Statistics Service

RF Customs Service

Expert judgments

Materials of field's establishments

Print and electronic business and specialized publications

Materials of producer companies and market participants

The research includes 98 graphs, 57 diagrams, 64 tables and 1 scheme.

EXTRACTS FROM RESEARCH

CHAPTER 3

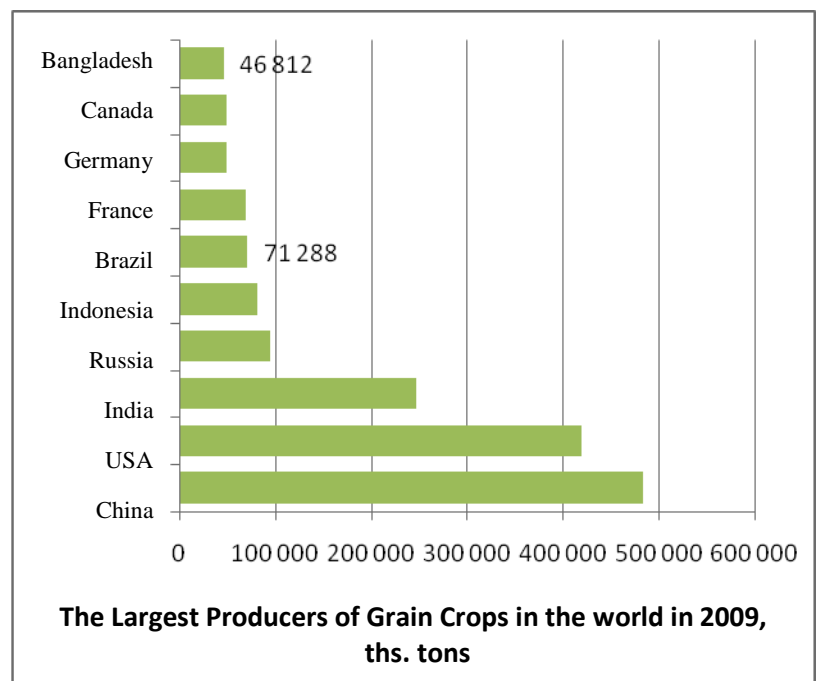
WORLD MARKET OF GRAIN CROPS

The main kinds of grain crops on the world market are corn (***%), wheat (27%) and rice (***%). The volume of the world production of grain crops in crop year of 2009/2010 made up *** mln. tons.

Leaders in harvesting grain crops are China, the USA and India. Russia ranks fourth.

People's Republic of China, the United States and

India accounted for ***% of the world production of grain crops in 2009, People's Republic of China and the United States having produced more than all the countries beyond the framework of the largest group of ten in total.



Trends on the world market of grain crops

In 2010 the basic factors influencing the world market of grain crops were:

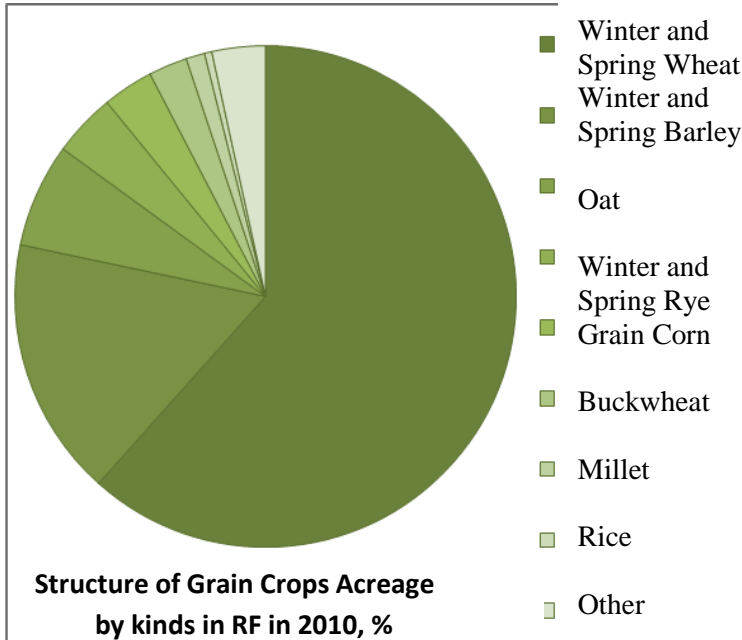
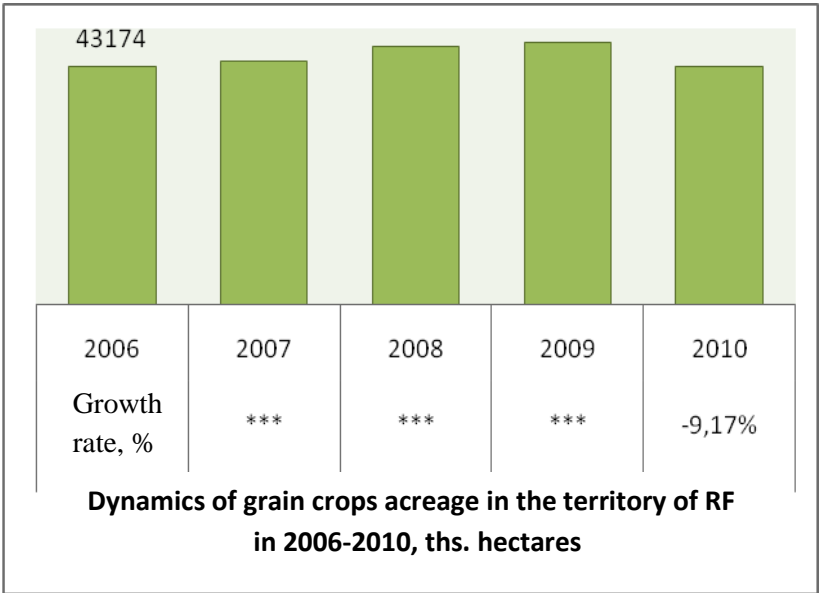
- continuing recovery of the financial economy;
- continuing steady growth of oil prices;
- growth of prices for main grain crops.

In 2011 there will be a continuation of the growth of grain crops prices caused by ...

CHAPTER 4

GRAIN CROPS ACREAGE IN
RUSSIA

The grain crops acreage that steadily increased since 2007 sharply decreased in 2010 and came back to the level of 2005.



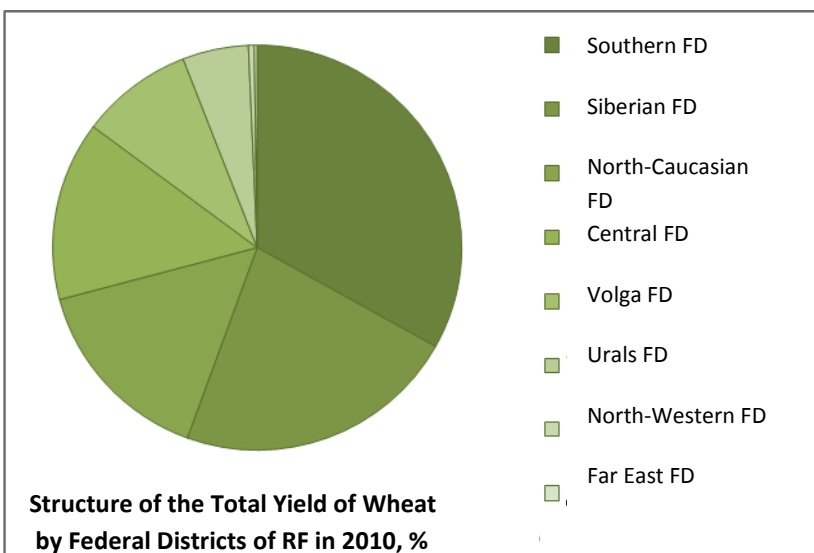
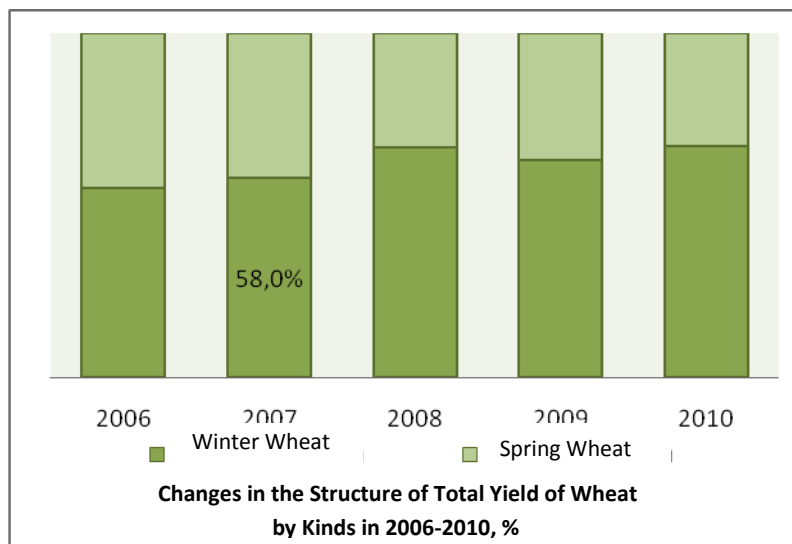
In 2010 more than ***% of acreage were given for wheat production. Barley was the second most widely spread crop. These two crops accounted for almost ***% of all the acreage.

CHAPTER 7

**TOTAL YIELD OF WHEAT
IN RUSSIA**

In 2010 after two years of all-time harvests, abnormal weather conditions led to a fall in wheat harvest volume below the level of 2006.

Since 2006 from a half to two thirds of wheat harvested have been the share of winter crops for the last five years, this share increasing with the flow of time. Especially high shares of winter crops were registered in record-breaking 2008, as well as in critical 2010.



In 2010 the Southern and Siberian FDs accounted for ***% of the total wheat harvest, the North-Caucasian and Central FDs accounted for other ***%.

CHAPTER 9

BALANCE OF SUPPLY AND
DEMAND FOR GRAIN CROPS
IN RUSSIA

After the embargo on grain export laid in the second half of 2010 official information about the balance has been reported irregularly and has been contradictory from time to time. Besides, the possibility of untimely embargo lift can lead to a noticeable change in the balance

indices. That is why ...

Balance of Grain Crops of Russia in 2006/07-2010/2011, mln. tons

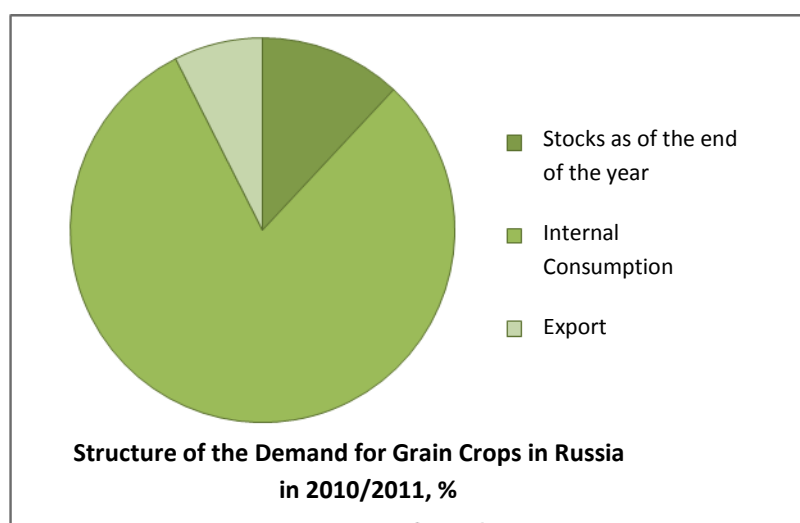
	2006/0 7	2007/0 8	2008/0 9	2009/1 0	2010/11 E
Stocks as of the beginning of the year	6,9	***	***	***	***
Production	***	***	***	97,1	***
Import	***	***	***	***	***
Supply, total	85,5	***	***	***	***
Export	10,6	***	12,9	***	***
Internal consumption	65,5	***	***	***	***
Stocks as of the end of the year	***	***	***	***	***
Demand, total:	82,3	***	***	***	80,3

According to Intesco Research Group experts, low harvest and embargo led to a rather noticeable decrease in the rates of consumption of grain crops – approximately to the level of *** year. The largest part of this decrease is explained by *** cut in the total number of livestock, that were fed with a substantial part of grain

crops. Besides, not less than one mln. tons of grain crops were imported to compensate for the shortage of grain (the biggest part of this grain came from ***, and that is why ...

Structure of the demand for grain crops

In 2010/11 there was exported the least share of grain for the period of the last five years – about ***% of the total demand.



LIST OF GRAPHS, DIAGRAMS, TABLES AND SCHEMES

MARKET RESEARCH METHODOLOGY

LIST OF GRAPHS, DIAGRAMS AND TABLES

1. PARAMETERS OF RUSSIAN CONSUMERS

Graph 1. Dynamics of the resident population size in Russia as of January 1, 2000-2011, mln. ppl.

Graph 2. Dynamics of real disposable incomes of the Russian population by months in 2008-2010, % to the previous year

Graph 3. Dynamics of average per capita monetary incomes of the population by months in 2008-2010, % to the previous year

Graph 4. Dynamics of average per capita monetary incomes of the population by months in 2008-2010, rub.

2. SUBJECT OF RESEARCH

Scheme 1. Classification of grain crops by their kinds

3. WORLD MARKET OF GRAIN CROPS

Graph 5. The largest producers of grain crops in 2009 in the world, ths. tons

Diagram 1. Structure of the world production of grain crops in physical terms by countries in 2009, %

Graph 6. The largest importers of grain crops in 2008 in the world, ths. dollars

Diagram 2. Structure of the world import of grain crops in money terms by countries in 2009, %

Graph 7. The largest exporters of grain crops in 2008 in the world, ths. dollars

Diagram 3. Structure of the world export of grain crops in money terms by countries in 2008, %

Graph 8. The largest consumers of grain crops in crop year of 2009/2010, ths. tons

Diagram 4. Structure of the world consumption of grain crops by countries in crop year of 2009/2010, %

4. ACREAGE OF GRAIN CROPS IN RUSSIA

Graph 9. Dynamics of grain crops acreage in the territory of RF in 2006-2010, ths. has

Diagram 5. Structure of grain crops acreage by kinds in RF in 2010, %

Diagram 6. Changes in the structure of grain crops acreage by kinds in RF in 2006-2010, %

Table 1. Acreage of grain crops by federal districts of RF in 2006-2010, ths. has

Diagram 7. Geography of grain crops acreage location by federal districts of RF in 2010, %

Diagram 8. Changes in the structure of grain crops acreage by federal districts of RF in 2006-2010, %

Table 2. Grain crops acreage in the regions of RF in 2006-2010, ths. has

Diagram 9. Structure of grain crops acreage by the largest regions of RF in 2010, %

Diagram 10. Changes in the structure of grain crops acreage by the largest regions of RF in 2006-2010, %

5. YIELD OF GRAIN CROPS IN RUSSIA

Graph 10. Dynamics of yield of grain crops in the territory of Russia in 2006-2010, centner (hundred kg)/ha

Graph 11. Regions of RF with the highest indices of grain crops yield in 2010, centner/ha

Graph 12. Regions of RF with the lowest indices of grain crops yield in 2010, centner/ha

6. TOTAL YIELD OF GRAIN CROPS IN RUSSIA

Graph 13. Dynamics of total yield of grain crops in the territory of RF in 2006-2010, ths. tons

Diagram 11. Structure of total yield of grain crops by kinds in RF in 2010, %

Diagram 12. Changes in the structure of the total yield of the grain crops by kinds in RF in 2006-2010, %

Table 3. Total yield of grain crops in federal districts of RF in 2006-2010, ths. centners

Diagram 13. Structure of total yield of grain crops by federal districts of RF in 2010, %

Diagram 14. Changes in the structure of the total yield of the grain crops by federal districts of RF in 2006-2010, %

Table 4. Total yield of grain crops in regions of RF in 2006-2010, ths. centners

Diagram 15. Structure of total yield of grain crops by regions of RF in 2010, %

Diagram 16. Changes in the structure of total yield of grain crops by regions of RF in 2006-2010, %

7. TOTAL YIELD OF WHEAT IN RUSSIA

Graph 14. Dynamics of total yield of wheat in the territory of RF in 2006-2010, ths. centners

Graph 15. Dynamics of total yield of winter and spring wheat in the territory of RF in 2006-2010, ths. centners

Diagram 17. Changes in the structure of the total yield of wheat by kinds in 2006-2010, %

Table 5. Total yield of wheat in federal districts of RF in 2006-2010, ths. centners

Diagram 18. Structure of total yield of wheat by federal districts of RF in 2010, %

Diagram 19. Changes in the structure of the total yield of wheat by federal districts of RF in 2006-2010, %

Table 6. Total yield of wheat in regions of RF in 2006-2010, ths. centners

Diagram 20. Structure of total yield of wheat by regions of RF in 2010, %

Diagram 21. Changes in the structure of the total yield of wheat by regions of RF in 2006-2010, %

8. TOTAL YIELD OF BARLEY IN RUSSIA

Graph 16. Dynamics of total yield of barley in the territory of RF in 2006-2010, ths. centners

Market of Grain Crops. Current Situation and Forecasts

Graph 17. Dynamics of total yield of winter and spring barley by kinds in the territory of RF in 2006-2010, ths. centners

Diagram 22. Changes in the structure of the total yield of barley by kinds in 2006-2010, %

Table 7. Total yield of barley in federal districts of RF in 2006-2010, ths. centners

Diagram 23. Structure of total yield of barley by federal districts of RF in 2010, %

Diagram 24. Changes in the structure of the total yield of barley by federal districts of RF in 2006-2010, %

Table 8. Total yield of barley in regions of RF in 2006-2010, ths. centners

Diagram 25. Structure of total yield of barley by regions of RF in 2010, %

Diagram 26. Changes in the structure of the total yield of barley by regions of RF in 2006-2010, %

9. BALANCE OF SUPPLY AND DEMAND FOR GRAIN CROPS IN RUSSIA

Table 9. Balance of grain crops in Russia in 2006/07 – 2010/11, mln. tons

Graph 18. Dynamics of supply of grain crops in Russia in 2006/07 - 2010/11, mln. tons

Diagram 27. Structure of supply of grain crops in Russia in 2010/11, %

Diagram 28. Structure of demand for grain crops in Russia in 2010/11, %

Diagram 29. Structure of grain crops use by purposes in RF, %

Graph 19. Structure of products of grain crops processing in 2008-2009, mln. tons

10. GOVERNMENT REGULATION OF THE GRAIN CROPS MARKET

11. GRAIN CROPS EXPORT ANALYSIS

Graph 20. Dynamics of the Russian export of grain crops in 2006-2010, tons

Graph 21. Dynamics of the Russian export of grain crops in 2006-2010, ths. dollars

Graph 22. Dynamics of the Russian export of grain crops by months in 2007-2011, tons

Graph 23. Dynamics of the Russian export of grain crops in money terms by months in 2007-2011, ths. dollars

Diagram 30. Structure of the Russian export of grain crops by their kinds in physical terms in 2010, %

Diagram 31. Structure of the Russian export of grain crops by their kinds in money terms in 2010, %

Graph 24. Dynamics of the Russian export of grain crops by largest countries of destination in 2006-2010, tons

Graph 25. Dynamics of the Russian export of grain crops by largest countries of destination in 2006-2010, ths. dollars

Table 10. Volume of the Russian export of grain crops by main countries of destination in 2007-2010, tons

Diagram 32. Structure of the Russian export of grain crops in physical terms by countries of destination in 2010, %

Market of Grain Crops. Current Situation and Forecasts

Table 11. Volumes of the Russian export of grain crops by countries of destination in 2007-2010, ths. dollars

Diagram 33. Structure of the Russian export of grain crops in money terms by countries of destination in 2010, %

Graph 26. Dynamics of the Russian export of wheat in 2006-2010, tons

Graph 27. Dynamics of the Russian export of wheat in 2006-2010, ths. dollars

Table 12. Volume of the Russian export of wheat by countries of destination in 2007-2010, tons

Diagram 34. Structure of the Russian export of wheat in physical terms by countries of destination in 2010, %

Table 13. Volume of the Russian export of wheat by countries of destination in 2007-2010, ths. dollars

Diagram 35. Structure of the Russian export of wheat in money terms by countries of destination in 2010, %

Graph 28. Dynamics of the Russian export of barley in 2006-2010, tons

Graph 29. Dynamics of the Russian export of barley in 2006-2010, ths. dollars

Table 14. Volume of the Russian export of barley by countries of destination in 2007-2010, tons

Diagram 36. Structure of the Russian export of barley in physical terms by countries of destination in 2010, %

Table 15. Volume of the Russian export of barley by countries of destination in 2007-2010, ths. dollars

Diagram 37. Structure of the Russian export of barley in money terms by countries of destination in 2010, %

Graph 30. Dynamics of the Russian export of oat in 2006-2010, tons

Graph 31. Dynamics of the Russian export of oat in 2006-2010, ths. dollars

Table 16. Volume of the Russian export of oat by countries of destination in 2007-2010, tons

Diagram 38. Structure of the Russian export of oat in physical terms by countries of destination in 2010, %

Table 17. Volume of the Russian export of oat by countries of destination in 2007-2010, ths. dollars

Diagram 39. Structure of the Russian export of oat in money terms by countries of destination in 2010, %

Graph 32. Dynamics of the Russian export of rye in 2006-2010, tons

Graph 33. Dynamics of the Russian export of rye in 2006-2010, ths. dollars

Table 18. Volume of the Russian export of rye by countries of destination in 2007-2010, tons

Diagram 40. Structure of the Russian export of rye in physical terms by countries of destination in 2010, %

Table 19. Volume of the Russian export of rye by countries of destination in 2007-2010, ths. dollars

Market of Grain Crops. Current Situation and Forecasts

Diagram 41. Structure of the Russian export of rye in money terms by countries of destination in 2010, %

Graph 34. Dynamics of the Russian export of corn in 2006-2010, tons

Graph 35. Dynamics of the Russian export of corn in 2006-2010, ths. dollars

Table 20. Volumes of the Russian export of corn by countries of destination in 2007-2010, tons

Diagram 42. Structure of the Russian export of corn in physical terms by countries of destination in 2010, %

Table 21. Volumes of the Russian export of corn by countries of destination in 2007-2010, ths. dollars

Diagram 43. Structure of the Russian export of corn in money terms by countries of destination in 2010, %

Graph 36. Dynamics of the Russian export of buckwheat in 2006-2010, tons

Graph 37. Dynamics of the Russian export of buckwheat in 2006-2010, ths. dollars

Table 22. Volumes of the Russian export of buckwheat by countries of destination in 2007-2010, tons

Diagram 44. Structure of the Russian export of buckwheat in physical terms by countries of destination in 2010, %

Table 23. Volumes of the Russian export of buckwheat by countries of destination in 2007-2010, ths. dollars

Diagram 45. Structure of the Russian export of buckwheat in money terms by countries of destination in 2010, %

Graph 38. Dynamics of the Russian export of millet in 2006-2010, tons

Graph 39. Dynamics of the Russian export of millet in 2006-2010, ths. dollars

Table 24. Volumes of the Russian export of millet by countries of destination in 2007-2010, tons

Diagram 46. Structure of the Russian export of millet in physical terms by countries of destination in 2010, %

Table 25. Volumes of the Russian export of millet by countries of destination in 2007-2010, ths. dollars

Diagram 47. Structure of the Russian export of millet in money terms by countries of destination in 2010, %

12. GRAIN CROPS IMPORT ANALYSIS

Graph 40. Dynamics of the Russian import of grain crops in 2006-2010, tons

Graph 41. Dynamics of the Russian import of grain crops in 2006-2010, ths. dollars

Graph 42. Dynamics of the Russian import of grain crops by months in 2007-2011, tons

Graph 43. Dynamics of the Russian import of grain crops by months in 2007-2011, ths. dollars

Diagram 48. Structure of the Russian import of grain crops by their kinds in physical terms in 2010, %

Market of Grain Crops. Current Situation and Forecasts

Diagram 49. Structure of the Russian import of grain crops by their kinds in money terms in 2009, %

Graph 44. Dynamics of the Russian import of grain crops by the largest countries of supply in 2007-2010, tons

Graph 45. Dynamics of the Russian import of grain crops by the largest countries of supply in 2007-2010, ths. dollars

Table 26. Volume of the Russian import of grain crops by countries in 2007-2010, tons

Diagram 50. Structure of the Russian import of grain crops in physical terms by countries in 2010, %

Table 27. Volume of the Russian import of grain crops by countries in 2007-2010, ths. dollars

Diagram 51. Structure of the Russian import of grain crops in money terms by countries in 2010, %

Graph 46. Dynamics of the Russian import of wheat in 2006-2010, tons

Graph 47. Dynamics of the Russian import of wheat in 2006-2010, ths. dollars

Table 28. Volumes of the Russian import of wheat by countries in 2007-2010, tons

Diagram 52. Structure of the Russian import of wheat in physical terms by countries in 2010, %

Table 29. Volumes of the Russian import of wheat by countries in 2007-2010, ths. dollars

Diagram 53. Structure of the Russian import of wheat in money terms by countries in 2010, %

Graph 48. Dynamics of the Russian import of oat in 2007-2010, tons

Graph 49. Dynamics of the Russian import of oat in 2008-2009, ths. dollars

Table 30. Volumes of the Russian import of oat by countries in 2007-2010, tons

Table 31. Volumes of the Russian import of oat by countries in 2007-2010, ths. dollars

Graph 50. Dynamics of the Russian import of corn in 2006-2010, tons

Graph 51. Dynamics of the Russian import of corn in 2006-2010, ths. dollars

Table 32. Volume of the Russian import of corn by countries in 2007-2010, tons

Diagram 54. Structure of the Russian import of corn in physical terms by countries in 2010, %

Table 33. Volume of the Russian import of corn by countries in 2007-2010, ths. dollars

Diagram 55. Structure of the Russian import of corn in money terms by countries in 2010, %

Graph 52. Dynamics of the Russian import of rice in 2006-2010, tons

Graph 53. Dynamics of the Russian import of rice in 2006-2010, ths. dollars

Table 34. Volume of the Russian import of rice by countries in 2007-2010, tons

Diagram 56. Structure of the Russian import of rice in physical terms by countries in 2010, %

Table 35. Volume of the Russian import of rice by countries in 2007-2010, ths. dollars

Diagram 57. Structure of the Russian import of rice in money terms by countries in 2010, %

13. PRODUCER PRICES FOR GRAIN CROPS

Graph 54. Dynamics of average producer prices for grain and pulse crops in RF in 2006-2010, rub/ton

Market of Grain Crops. Current Situation and Forecasts

Graph 55. Dynamics of average producer prices for grain and pulse crops in RF by months in 2006-2010, rub/ton

Table 36. Dynamics of average producer prices for grain and pulse crops in RF by months in 2006-2010, rub/ton

Graph 56. Dynamics of average producer prices for wheat in RF in 2006-2010, rub/ton

Graph 57. Dynamics of average producer prices for wheat in RF by months in 2006-2010, rub/ton

Table 37. Dynamics of average producer prices for wheat in RF by months in 2006-2010, rub/ton

Graph 58. Dynamics of average producer prices for soft wheat in RF in 2006-2010, rub/ton

Graph 59. Dynamics of average producer prices for soft wheat in RF by months in 2008-2010, rub/ton

Table 38. Dynamics of average producer prices for soft wheat in RF by months in 2006-2010, rub/ton

Graph 60. Dynamics of average producer prices for soft wheat of Class 3 (milling wheat) in RF by months in 2009-2010, rub/ton

Table 39. Dynamics of average producer prices for soft wheat of Class 3 (milling wheat) in RF by months in 2009-2010, rub/ton

Graph 61. Dynamics of average producer prices for soft wheat of Class 4 (milling wheat) in RF by months in 2009-2010, rub/ton

Table 40. Dynamics of average producer prices for soft wheat of Class 4 (milling wheat) in RF by months in 2009-2010, rub/ton

Graph 62. Dynamics of average producer prices for soft wheat of Class 5 (feed wheat) in RF by months in 2009-2010, rub/ton

Table 41. Dynamics of average producer prices for soft wheat of Class 5 (feed wheat) in RF by months in 2009-2010, rub/ton

Graph 63. Dynamics of average producer prices for soft strong wheat (Classes 1 and 2) in RF in 2006-2010, rub/ton

Graph 64. Dynamics of average producer prices for soft strong wheat (Classes 1 and 2) in RF by months in 2006-2010, rub/ton

Table 42. Dynamics of average producer prices for soft strong wheat (Classes 1 and 2) in RF by months in 2006-2010, rub/ton

Graph 65. Dynamics of average producer prices for durum wheat in RF in 2006-2010, rub/ton

Graph 66. Dynamics of average producer prices for durum wheat in RF by months in 2006-2010, rub/ton

Table 43. Dynamics of average producer prices for durum wheat in RF by months in 2006-2010, rub/ton

Graph 67. Dynamics of average producer prices for food barley in RF by months in 2009-2010, rub/ton

Market of Grain Crops. Current Situation and Forecasts

Table 44. Dynamics of average producer prices for food barley in RF by months in 2009-2010, rub/ton

Graph 68. Dynamics of average producer prices for feed barley in RF by months in 2009-2010, rub/ton

Table 45. Dynamics of average producer prices for feed barley in RF by months in 2009-2010, rub/ton

Graph 69. Dynamics of average producer prices for milling rye in RF by months in 2009-2010, rub/ton

Table 46. Dynamics of average producer prices for milling rye in RF by months in 2009-2010, rub/ton

Graph 70. Dynamics of average producer prices for feed rye in RF by months in 2009-2010, rub/ton

Table 47. Dynamics of average producer prices for feed rye in RF by months in 2009-2010, rub/ton

Graph 71. Dynamics of average producer prices for buckwheat in RF by months in 2006-2010, rub/ton

Graph 72. Dynamics of average producer prices for buckwheat in RF by months in 2006-2010, rub/ton

Table 48. Dynamics of average producer prices for buckwheat in RF by months in 2008-2010, rub/ton

Graph 73. Dynamics of average producer prices for millet in RF in 2006-2010, rub/ton

Graph 74. Dynamics of average producer prices for millet in RF by months in 2008-2010, rub/ton

Table 49. Dynamics of average producer prices for millet in RF by months in 2006-2010, rub/ton

Graph 75. Dynamics of average producer prices for oat in RF in 2006-2010, rub/ton

Graph 76. Dynamics of average producer prices for oat in RF by months in 2006-2010, rub/ton

Table 50. Dynamics of average producer prices for oat in RF by months in 2006-2010, rub/ton

14. PRICES FOR GRAIN CROPS ACQUISITION BY INDUSTRIAL ENTERPRISES

Graph 77. Dynamics of average prices of wheat acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Graph 78. Dynamics of average prices of wheat acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 51. Dynamics of average prices of wheat acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Graph 79. Dynamics of average prices of soft wheat acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Table 52. Dynamics of average prices of soft wheat acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Graph 80. Dynamics of average prices of soft wheat (Class 3) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Market of Grain Crops. Current Situation and Forecasts

Table 53. Dynamics of average prices of soft wheat (Class 3) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Graph 81. Dynamics of average prices of soft wheat (Class 4) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Table 54. Dynamics of average prices of soft wheat (Class 4) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Graph 82. Dynamics of average prices of soft wheat (Class 5) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Table 55. Dynamics of average prices of soft wheat (Class 5) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Graph 83. Dynamics of average prices of strong wheat (Classes 1 and 2) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Table 56. Dynamics of average prices of strong wheat (Classes 1 and 2) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Graph 84. Dynamics of average prices of durum wheat (grade and non-grade) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Table 57. Dynamics of average prices of durum wheat (grade and non-grade) acquisition by industrial enterprises in RF by months in 2009-2010, rub/ton

Graph 85. Dynamics of average prices of barley acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Graph 86. Dynamics of average prices of barley acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 58. Dynamics of average prices of barley acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Graph 87. Dynamics of average prices of rye acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Graph 88. Dynamics of average prices of rye acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 59. Dynamics of average prices of rye acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Graph 89. Dynamics of average prices of buckwheat acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Graph 90. Dynamics of average prices of buckwheat acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 60. Dynamics of average prices of buckwheat acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Graph 91. Dynamics of average prices of millet acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Market of Grain Crops. Current Situation and Forecasts

Table 92. Dynamics of average prices of millet acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 61. Dynamics of average prices of millet acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Graph 93. Dynamics of average prices of corn acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Graph 94. Dynamics of average prices of corn acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 62. Dynamics of average prices of corn acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Graph 95. Dynamics of average prices of oat acquisition by industrial enterprises in RF in 2008-2010, rub/ton

Graph 96. Dynamics of average prices of oat acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

Table 63. Dynamics of average prices of oat acquisition by industrial enterprises in RF by months in 2008-2010, rub/ton

15. TRENDS ON THE RUSSIAN MARKET OF GRAIN CROPS

16. FORECAST OF DEVELOPMENT OF THE RUSSIAN GRAIN CROPS MARKET FOR CROP YEAR OF 2010/11 - 2011/12

Graph 97. Dynamics of the total yield of grain crops in Russia in 2006/07 - 2010/11 and forecast for 2011/12, mln. tons

Graph 98. Dynamics of grain crops acreage in the territory of RF in 2006-2010 and forecast for 2011-2012, mln. ha

Table 64. Balance of grain crops of Russia in 2006/07 – 2010/11 and forecast for 2011/12, mln. tons

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