

Possible Effects of Russia's WTO Accession on Agricultural Trade and Production

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ICTSD
International Centre for Trade and Sustainable Development

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ICTSD welcomes feedback and comments on this document. These can be forwarded to Jonathan Hepburn at jhepburn [at] ictsd.ch

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LIST OF ABBREVIATIONS AND ACRONYMS

AMS	Aggregate Measurement of Support
CIS	Commonwealth of Independent States
CU GSP	Custom Union Generalised System of Preferences
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
NYMEX	New York Mercantile Exchange
SPS measures	Sanitary and Phytosanitary Measures
TRQ	Tariff Rate Quota
WTO	World Trade Organisation

FOREWORD

The WTO's 8th Ministerial Conference, in December 2011, endorsed Russia's long-standing bid to join the organisation, following the approval of a package of reforms and commitments by the Working Party on Russia's accession one month earlier. Russia is now widely expected to become a fully-fledged WTO member in mid-2012 with domestic ratification functionally completing the accession.

Russia had been negotiating to join the global trade body since 1993, making it the largest economy and only G-20 nation still outside the WTO. Its accession is a significant development for the organisation, with the potential to have important ramifications for trade and production both domestically and internationally, including in the agricultural sector.

As a major player in both economic and political terms, Russia's entry into the multilateral trading system has both symbolic and immediate practical significance. Apart from the specific implications for particular products and markets, it is a move which has systemic importance as the country commits to engaging with its trading partners under a global framework of rules and processes, as well as to shaping the future evolution of this framework as an active member of the organisation.

The agricultural sector is of particular importance to Russia and to its trading partners, as the country is both a major exporter and importer of a number of important commodities. As Sergey Kiselev and Roman Romashkin point out in their paper, products such as meat, dairy products and sugar remain sensitive to competition from imports, and Russia's WTO accession may allow developing country exporters of these products to benefit from greater access to Russian markets. At the same time, Russia is also an important exporter, in particular for products such as wheat and barley: importing countries could benefit from greater market stability resulting from Russia's commitment to respect WTO rules on export restrictions in this area, for example. Increased market access for some products, such as wine and grapes, are likely to benefit both exporting countries and Russian consumers.

This study therefore seeks to provide policy-makers, negotiators and other stakeholders with an impartial, evidence-based assessment of the implications of Russia's accession to the WTO for agricultural trade and production, looking in particular at how developing countries could be affected. It examines how disciplines on market access, domestic support and export competition in Russia's accession agreement could be expected to affect particular products, and looks at what these would mean for specific exporting and importing countries. Finally, the study also explores how the terms of Russia's accession to the WTO could influence agriculture in the countries of the Customs Union of Russia, Belarus and Kazakhstan and their international trade with third countries.

Russia's embrace of WTO disciplines and economic prescriptions, together with the commitments it would make to trading partners as inscribed in the Accession Protocol and Working Party Report, will bring about significant reforms in Russia, not least to its agricultural sector. These will also be expected to be fueled and affected by new terms of engagement between the Russian economy and the rest of the world. And the other side of the coin will also be of great significance: how Russia's agriculture under the new terms will have a bearing on the performance of the world's agricultural activity, and more importantly the impact it will have in terms of food security, the ability of those under critical distress to respond to climate change, water shortages and poverty alleviation the world over. This study is a first modest contribution to what should be an informed understanding of these important matters. We hope it is of interest and use in the reader's own work, and look forward to your comments.

Ricardo Meléndez-Ortiz
Chief Executive, ICTSD

EXECUTIVE SUMMARY

Since 1999, Russia's agricultural production has been growing quite rapidly. The average growth rate of gross agricultural production for 1999-2010 amounted to 2.4 percent per year. In absolute terms, Russia's average annual gross agricultural production reached USD 86.4 billion in 2008-2010.

Growth in agricultural production was accompanied by an increase in investment activity. Investment was stimulated through the implementation of the National Priority Project on "Development of the Agro-Industrial Complex" for the period 2006-2007 and also through the State Program for agriculture development and regulation of the markets for agricultural products, raw materials and food for the period 2008-2012. The period of 2005-2009 was characterized by a gradual increase in budgetary support to agriculture both in absolute terms and as a share of gross agricultural production. Increases in federal agricultural support encouraged some regional authorities to focus on support programs that had been developed by the federal government.

Russia's growing agricultural and food markets are attractive both for domestic producers and to suppliers from abroad. Considering their competitive advantages and the competitiveness of domestic production, Russia's producers are likely to increase production of oilseeds, vegetable oils and grains. The shares of domestic producers in the markets of animal products (meat and milk) will grow only if investment in livestock production goes up, and if there is also a high level of protection against imports. Protection will also be an important factor in increasing Russia's domestic producers' share of the sugar market.

However, Russia remains a net importer of agricultural and food products. Growth in agricultural production has occurred alongside an increase in agro-food imports. The products that are most sensitive to competition from imports are meat, dairy products and raw sugar. Agro-food imports originating in the CIS countries accounted for about 10 percent of all such imports in 2008-2010, and the share of non-CIS countries was about 90 percent.

Russia's regulation of agro-food imports took the form of both tariff and non-tariff measures in 2008-2010. One of the important non-tariff measures was the use of forecast balances (quotas) between Russia and Belarus on trade in sugar, meat and meat products, and milk and dairy products. Other important measures to restrict imports from non-CIS countries are meat tariff quotas and a floating duty on raw sugar.

Russia's agro-food exports have been growing alongside the increase in imports. Since 2002, Russia has become one of the largest suppliers of grain to the world market. Wheat and barley are Russia's main export crops. Exports of corn and rice are gradually increasing. In addition, the modernization of the food industry has contributed to increasing Russia's exports of beer, ice cream and dairy and meat products. More than two thirds of Russian agro-food exports were destined for non-CIS countries.

The major importers of Russian wheat are Egypt and Turkey. Large supplies of barley are delivered to Saudi Arabia, Libya and Iran. Large volumes of rice were exported to Turkey in 2010. The geographical proximity of these countries to Russia contributes to the competitive advantage of Russian exporters, who benefit from relatively low transportation costs.

Russia's regulation of grain exports depends on the availability of grain in the domestic market. In case of a shortage of grains, both tariff and non-tariff measures have been used to restrict grain exports.

In general, Russia's imports of agricultural and food products are characterized by a low degree of substitution between goods from developing and from CIS countries. This is due to the specific set of commodities being imported and the limited capacity of CIS countries to meet demand from Russia. Probably, the meat commodity groups exhibit the highest degree of substitution.

Developing countries dominate over CIS countries in Russia's agricultural trade. In 2010, agricultural exports to developing countries accounted for 39 percent of Russia's total value of agricultural exports. The share of agricultural imports from developing countries to Russia was more than 31 percent. Meat, sugar, wine, rice, tea, coffee, fruit and tobacco are the main agricultural and food commodities imported from developing countries.

Brazil is the main developing country supplier of meat in Russia's market. In 2010, Brazil represented 60.9 percent of Russia's imports of meat of bovine animals from developing countries, and 99.3 percent and 94.6 percent of its imports of swine meat and poultry meat, respectively. Uruguay, Paraguay and Argentina are also large suppliers of meat of bovine animals.

All sugar imports to Russia from non-CIS countries are supplied by developing countries. Brazil is the main sugar supplier. In 2010, Brazil accounted for 85.8 percent of Russia's sugar imports from developing countries.

The share of developing countries in Russia's wine imports from non-CIS countries is less than ten percent. The main developing country suppliers of wine to Russia are Chile, Brazil, South Africa and Argentina.

Developing countries supply almost all imports of rice to Russia from non-CIS countries. Vietnam, Thailand, Pakistan and China are the main suppliers of rice to Russia's market.

Against the background of growing imports of coffee, the share of developing countries in Russia's coffee imports from non-CIS countries is declining. Brazil and Indonesia are the main suppliers of coffee to Russia from developing countries.

Almost all tea imports to Russia come from developing countries. Sri Lanka and India are the main suppliers. The supply of tea from China, Vietnam, Kenya and Indonesia has increased significantly.

Developing countries are the main suppliers of fruit to Russia. Developing countries account for 100 percent of Russia's banana imports from non-CIS countries. The share for citrus fruits is about 90 percent, and for grapes about 80 percent.

Ecuador is the main supplier of bananas, and a significant share of Russia's citrus imports originate in Turkey, Morocco, South Africa and Egypt. The main suppliers of fresh or dried grapes are Turkey, Chile and Iran.

Countries that export agricultural and food commodities to Russia will benefit from Russia's accession to the WTO in several ways. They include a reduction in Russia's custom duties; trade facilitation and predictability of Russia's regulation of foreign trade activity; and unification and transparency of Russia's non-tariff measures for trade regulation. These benefits will strengthen the competitiveness of imports in Russia's domestic agricultural and food market. As consumer demand grows, this will lead to an increase in Russia's agricultural and food imports.

Reduction of some kinds of budgetary support and restrictions on its use in Russia will reinforce the competitiveness of imports of agricultural and food products both from CIS and non-CIS countries.

Russia is committed to using the Customs Union Generalized System of Preferences scheme. Under this scheme, import duties on products eligible for tariff preferences and originating from developing countries are 75 percent of the MFN duty rates (zero percent on such products from least-developed countries).

For several commodity groups, Russia's commitments will allow substantial increases in trade, primarily in sugar and pork. In the intermediate term, it is possible to expect the competitiveness of Brazilian pork and raw sugar supply to further strengthen.

Accession to the WTO will not allow Russia to carry out its policy of substituting relatively low cost beef imports with domestic beef production. This will have a favourable effect on beef exporters in developing countries (Brazil, Uruguay and Paraguay), and on Russia's consumers.

Chile, South Africa and Argentina will benefit from the significant reduction in Russia's import duties on wine. These countries will compete against developed country exporters in Russia's market as before.

Developing countries - the main suppliers of bananas, citrus, coffee and tea - will not receive significant benefits from the reduction of customs duties for these products, as the current levels of these duties are not high. However, substantial reduction of duties on grapes (from ten to five percent) will bring benefits for Turkey and Chile.

Removing various restrictions (both tariff and non-tariff) on access to Russia's agricultural and food market will improve the terms of trade for non-CIS countries. This will contribute to some suppliers of agricultural and food commodities from CIS countries being replaced by exporters from non-CIS countries.

Non-CIS countries (including developing countries) may eventually see improvements not only in access to Russia's market but also in access to the markets of Belarus and Kazakhstan, Russia's Customs Union partners. Some benefits can also be obtained by developing countries through negotiations with Belarus and Kazakhstan on the terms of their accession to the WTO and the extension of their commitments to the whole Customs Union area, including Russia's market.

Russia's WTO commitments limit the use of export restrictions or prohibitions to temporary application only to prevent or relieve critical shortages of foodstuffs in Russia's domestic market. Russia must notify beforehand the WTO Committee on Agriculture on the nature and duration of the measures to be taken and also consider the interests of other members of the WTO. These commitments will help developing countries to react in a timely way to possible prohibitions or restrictions of Russia's grain exports.

Russia's membership in the WTO will provide significant trade benefits for developing countries. In case of a breach of Russia's obligations, the WTO dispute settlement system can be used to seek redress, an avenue that was not open before Russia acceded to the WTO.

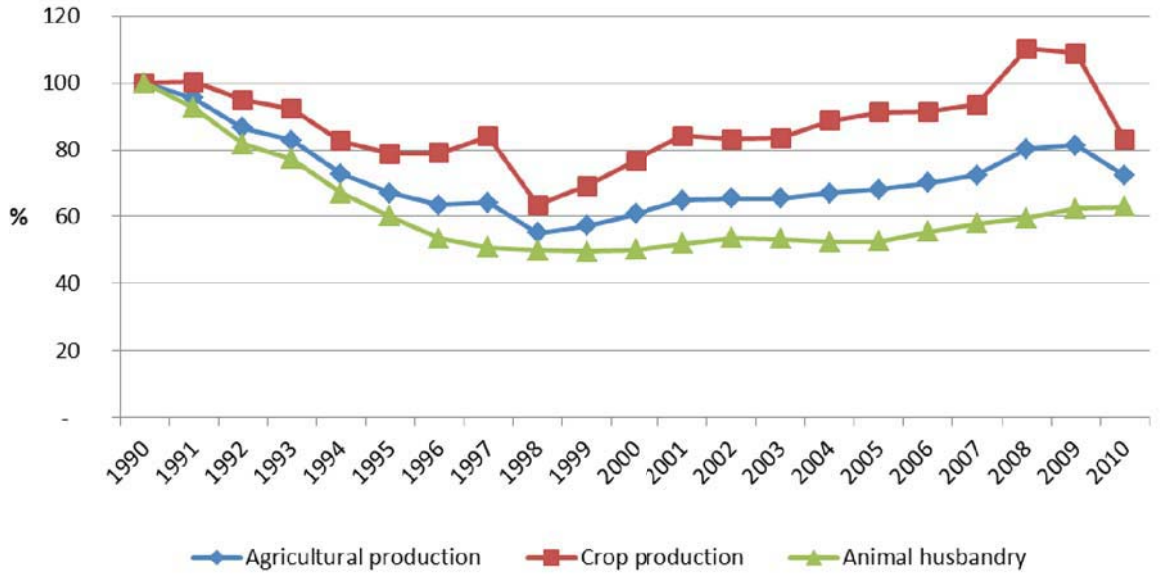
1. MAJOR CHARACTERISTICS OF RUSSIA'S AGRICULTURE

1.1 Dynamics of Russia's Agriculture Development

Since 1999, Russia's economy has been growing quite rapidly. During the period from 1999 to 2010, the average annual GDP growth rate was 5.4 percent. The cumulative GDP growth for the period following the default of 1998 amounted to 186.7 percent.

The favourable economic environment affected Russia's agriculture. The average growth rate of gross agricultural production for 1999-2010 amounted to 2.4 percent per year. During this period a decline in agricultural production was observed only in 2010 due to abnormal drought. In 2010 agricultural production declined by 11.3 percent, mainly due to a reduction in crop production by 23.8 percent.

Figure 1. Cumulative indexes of agricultural production in Russia (%)



Source: Calculated from RF Federal State Statistics Service data

Crop production is the main contributor to agricultural growth. However, in recent years animal production has grown due to the dynamic development of poultry and swine production.

The following factors contributed to the increase in agricultural production in Russia since 1999:

- favourable weather conditions due to the positive influence of climatic changes;
- real income growth;
- development of the food industry, generating more demand for farm output;
- strengthening the role of vertically integrated companies (agricultural holdings) in Russia's agricultural market, including their investment activity;
- active application of border protection measures (including non-tariff measures);
- an increase in budgetary support for agriculture (availability of soft credit) and use of targeted policies and expenditure programs in the agricultural sector.

In the early 2000s, the attractiveness of agriculture for investment began to increase (see figure 2). This process was supported at the national level through the implementation of the National Priority Project on "Development of the Agro-Industrial Complex"[1] in 2006-2007, and also through the State program for

agriculture development and regulation of the markets for agricultural products, raw materials and food for the period 2008-2012[2].

As a result, agriculture has demonstrated rather positive development, even in 2009 when the country's GDP declined (see figure 1 and table 1). Overall in 2009, the share of agriculture and hunting in Russia's GDP was 3.7 percent, while the share of agricultural production in output of goods and services amounted to 3.6 percent. The share of food production in the country's GDP in 2009 was 2.2 percent.

Table 1. Role of agriculture and food production in Russia's economy[3]

	2006	2007	2008	2009
GDP at market prices (USD billion)	990.0	1299.7	1669.8	1234.2
Output of goods and services at basic prices (USD billion)	1700.0	2257.7	2886.3	2182.2
Agriculture and hunting				
- Value added (USD billion)	33.7	43.6	57.0	45.8
- Output at basic prices (USD billion)	63.5	82.4	108.2	88.0
The share of agriculture and hunting in country's GDP, %	***3.4***	***3.4***	***3.4***	***3.7***
Food production, including beverages				
- Value added (USD billion)	21.9	26.8	34.7	27.7
- Output at basic prices (USD billion)	72.9	98.2	123.2	103.7
The share of food production, including beverages in country's GDP, %	***2.2***	***2.1***	***2.1***	***2.2***
Agricultural production in all types of farm units at current prices (USD billion)	57.8	75.5	99.2	79.4
The share of agricultural production in output of goods and services, %	***3.4***	***3.3***	***3.4***	***3.6***

Source: Calculations based on RF Federal State Statistics Service and Bank of Russia data

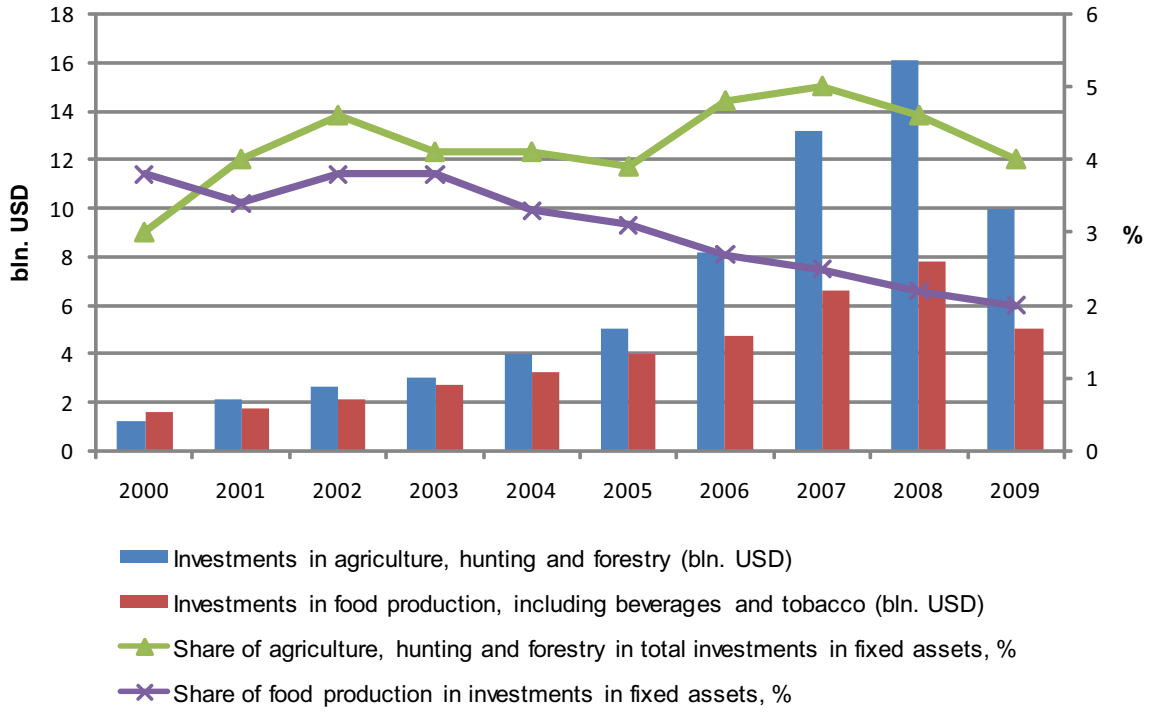
In general, the dynamics of investment activity in agriculture differ from those in the food production industry (see figure 2 and table 1.1 in annex 1). The share of food production in Russia's total investment in fixed assets reached its maximum values during 2000-2003. In agriculture this figure increased significantly in 2006-2007, during the implementation of the National Priority Project on "Development of the Agro-Industrial Complex", due to increased government support and the availability of credit to agricultural producers.

Domestic support is seen by many as an essential factor for the development of the agricultural sector. By now, the Russian Federation has developed a system whereby authority in the field of agricultural support is also given to the regional level. The federal government is responsible for developing and implementing the federal departmental special-purpose programs, providing general conditions for the agricultural sector through the financing of entities in charge (federal government unitary enterprises, federal government agencies) and regulating agro-food markets, as well as developing the main directions of agricultural policy.

The federal budget subsidies are provided to the regions on a co-financing basis. The co-financing in implementing the federal agricultural policy at the regional level encourages development and strengthens Russia's common agricultural market[4].

Thus, regional spending on agriculture may be funded from both the regional and federal budgets. When the regional authorities finance and implement support programs with federal funding, they are required to meet certain obligations developed at the federal level. This contributes to making regional expenditures on agriculture accord with federal priorities and guidelines.

Figure 2. Investments in fixed assets in agriculture and food production industry and their shares in total investments in fixed assets in 2000-2009



Source: Calculated from RF Federal State Statistics Service data

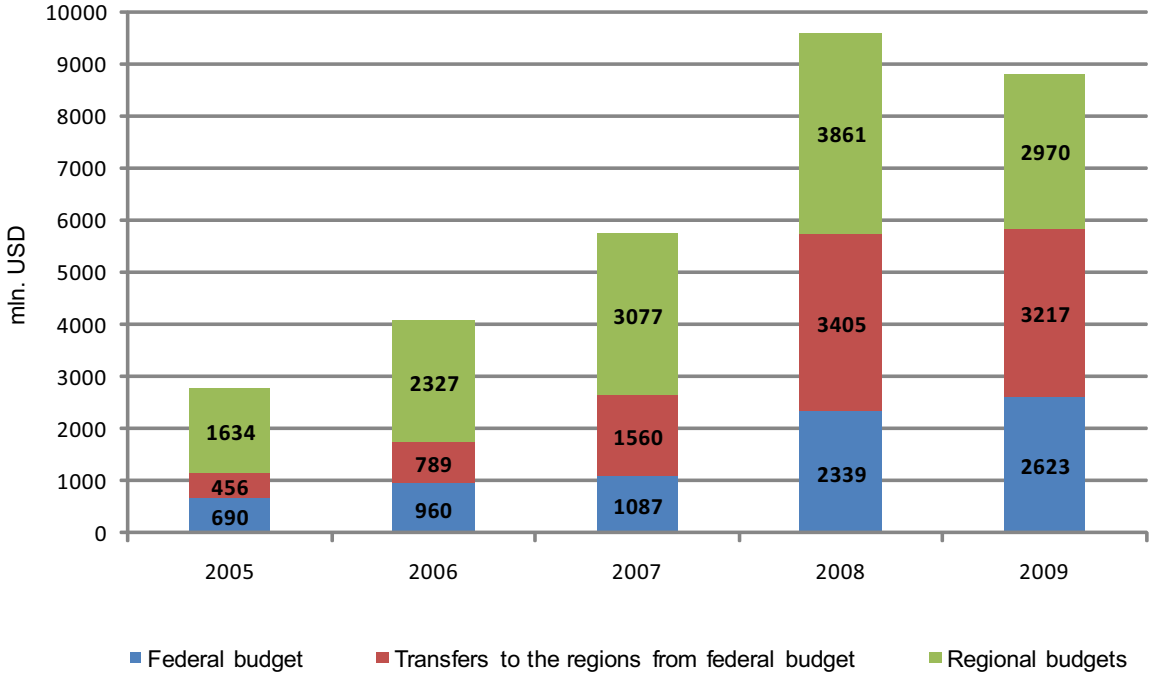
Figure 3 shows that total expenditures of the consolidated budget for agriculture and fisheries increased from USD 2.8 billion in 2005 (5.7 percent of the gross agricultural production) to USD 8.8 billion in 2009 (11.1 percent of gross agricultural production). At the same time, subsidies from the federal budget (including transfers to the regions) increased more than five-fold, and subsidies from regional budgets doubled.

Regional expenditures associated with the development of agricultural production remain considerable. In particular, some programs to develop livestock production provide subsidies for livestock products entirely from regional budgets.

Several programs aim to ensure the availability of agricultural machinery, equipment and breeding stock through the development of leasing by means of soft loans to lessees or leasing companies. In some regions, certain categories of lessees (e.g., private farmers) receive subsidies to compensate for 50 percent of the initial lease payment. Regional leasing programs exist alongside the federal leasing program.

In addition to leasing, some regions apply subsidies to stimulate the adoption of resource, energy and water-saving technologies in agriculture. Moreover, loans on preferential terms and subsidies for electricity costs of farm-irrigation stations are provided widely at the regional level. Also, to regulate regional agricultural and food markets, regional authorities may carry out procurement and commodity interventions.

Figure 3. Expenditures of Russia's consolidated budget on agriculture and fisheries in 2005-2009 (USD million).



Source: RF Federal State Statistics Service and RF Ministry of Finance data

Therefore, the period of 2005-2009 is characterized by a gradual increase in budgetary support to agriculture, both in absolute terms and in relation to gross agricultural output. Increases in federal agricultural support have encouraged regional authorities to focus on support programs that were developed by the federal government.

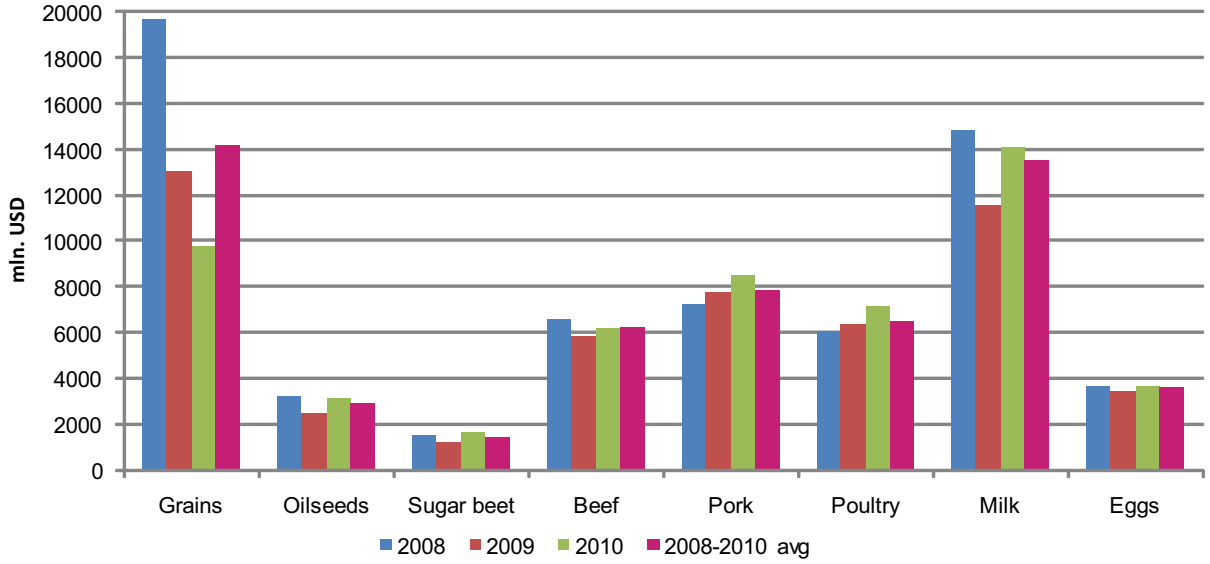
As a whole, by 2008 all the preconditions for maintaining steady growth in agriculture had been created. However, the potential to maintain this growth depends on numerous factors: macroeconomic stability, availability of long-term and short-term credit, changing consumer demand, state foreign trade policy, agriculture support policy and directions, exchange rate movements, and the evolution of the prices of agricultural commodities, food and inputs used in agricultural production.

1.2 Production of Main Agricultural Commodities in 2008–2010

Gross agricultural production amounted to USD 86.4 billion in average annual terms during 2008-2010 (see table 1.2 in annex 1). A substantial share of agricultural production is produced by household plots (47.1 percent). This refers mainly to labour-intensive products, such as potatoes, vegetables, meat and milk (more than 50 percent of meat and milk is produced by household plots), wool (around 60 percent), and eggs (more than 25 percent). The share of agricultural enterprises in total agricultural production is 45.7 percent and that of private farms and individual entrepreneurs is 7.5 percent.

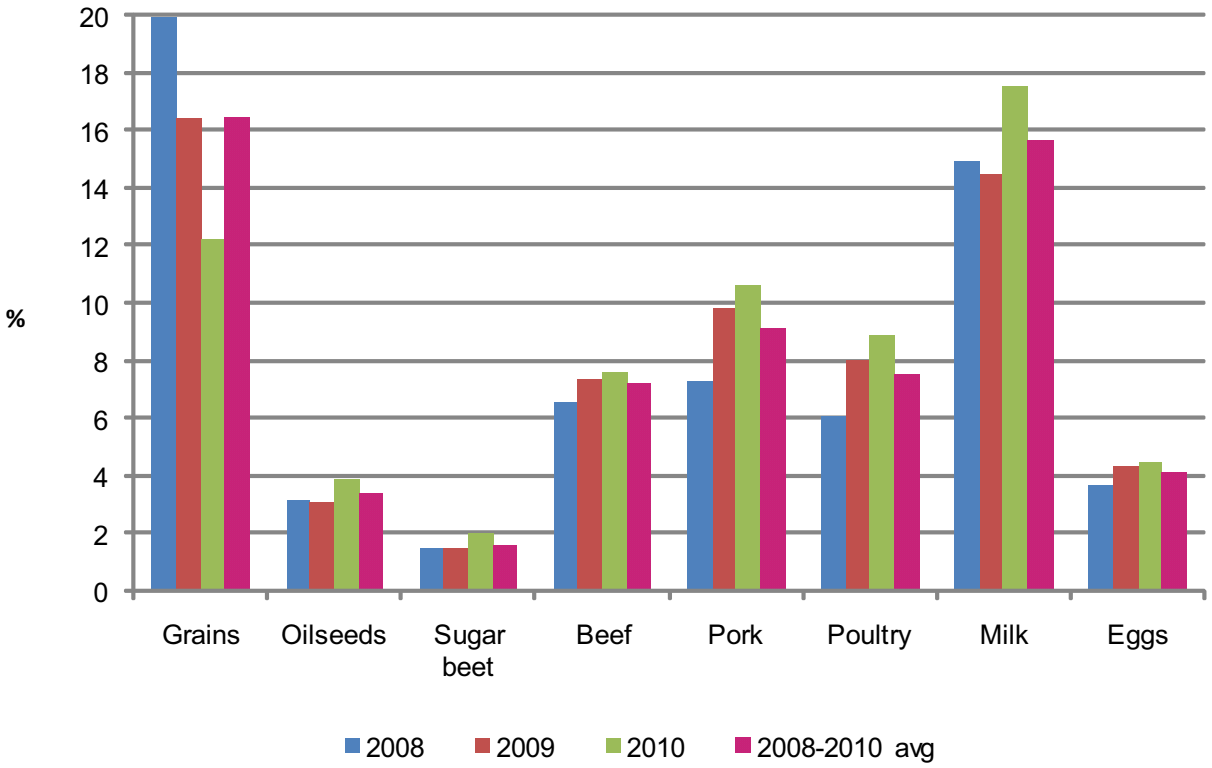
Grain production contributes 16.4 percent of Russia's gross agricultural production or USD 14.2 billion on an average annual basis (see figures 4 and 5 and table 1.2 in annex 1). Grain crops occupy about 60 percent of the cultivated land. The share of grain in gross agricultural production declined in 2009-2010 after its maximum level was reached in 2008, when the gross grain harvest amounted to 108.2 million tonnes.

Figure 4. Values of production[5] of main agricultural commodities in 2008-2010 (USD million)



Source: Calculations based on RF Federal State Statistics Service and Bank of Russia data

Figure 5. Shares of main agricultural commodities in gross agricultural production in 2008-2010 (%)



Source: Calculations based on RF Federal State Statistics Service and Bank of Russia data

The value of production in the milk sector is very substantial, averaging USD 13.5 billion on an annual basis. The share of milk in gross agricultural production is 15.6 percent. The increase in the value of milk production in 2010 was linked to the favourable market environment that prevailed in that year. Although milk production declined by 1.7 percent to 32.0 million tonnes in 2010, due to a decrease in the number of cows by two percent, milk yield per cow increased by 2.5 percent or 113 kilogrammes (reaching 4600 kilogrammes per cow per year). This increase is the result of bringing herds up to date qualitatively, improving feeding, and technical and technological modernization of dairy farms.

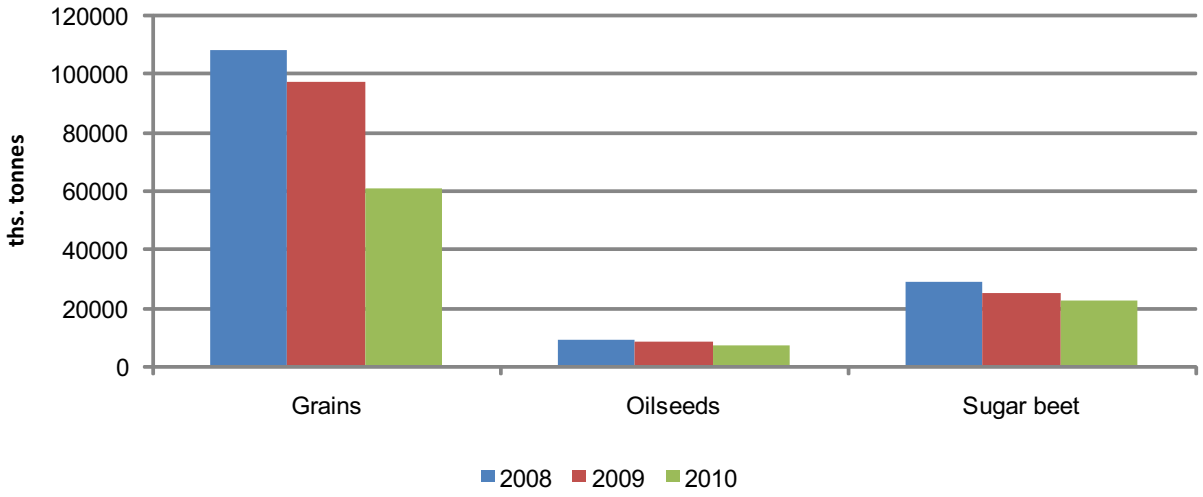
The share of meat in gross agricultural production is much lower than that of milk. The share of pork production over the period considered was 9.1 percent (USD 7.9 billion), poultry 7.5 percent (USD 6.5 billion), and beef 7.2 percent (USD 6.2 billion).

The egg industry evolved favourably over this period. The share of eggs in gross agricultural production was 4.1 percent (USD 3.6 billion) in 2008-2010. Egg production expanded due to the growing number of laying hens and improved laying ability. Egg production is more profitable than other types of livestock production.

The poultry industry grew the fastest during the period considered (see figure 7 and table 1.3 in annex 1). Poultry production increased by 27.9 percent in 2010 compared to 2008. Good results were also achieved in pork production.

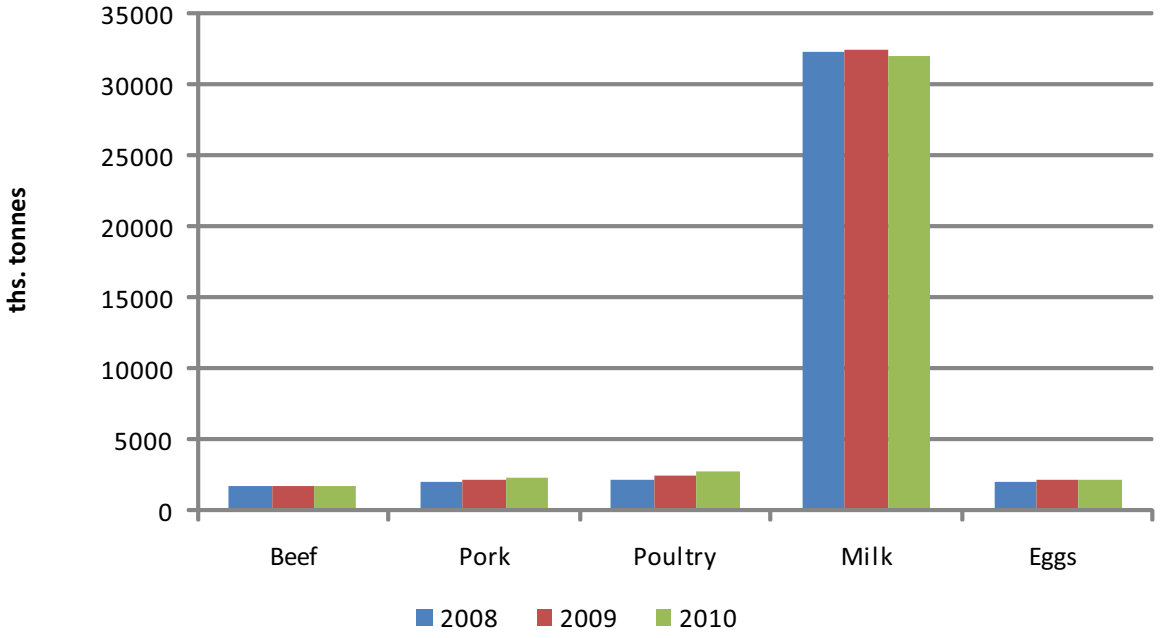
A significant decline can be observed in crop production from 2008, a year with unusually high yields. Yields in 2010 were very low due to abnormal drought.

Figure 6. Production of main plant products in 2008-2010 (thousand tonnes)



Source: RF Federal State Statistics Service data

Figure 7. Production of main animal products in 2008-2010 (thousand tonnes)



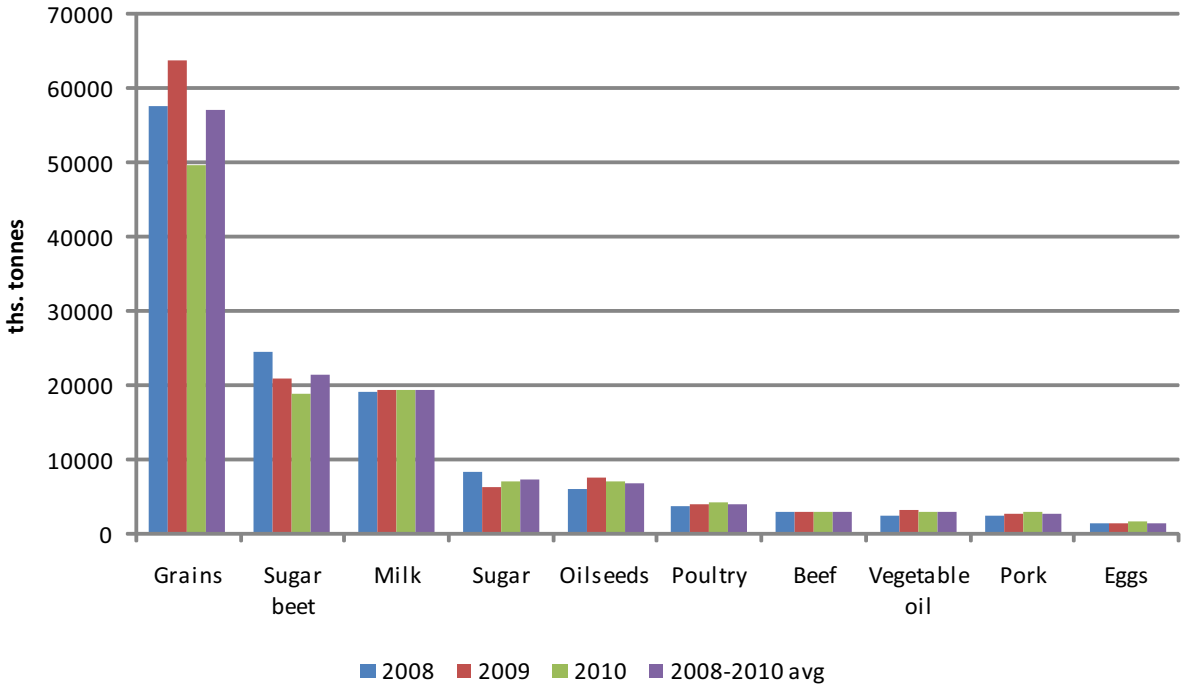
Source: RF Federal State Statistics Service data

1.3 Market Volumes of Main Agricultural and Food Commodities in 2008–2010

Market volume of a particular agricultural or food commodity was estimated as the sum of the volume of this commodity's marketed output for domestic consumption, and the volume of exports and imports of the same commodity (see figures 8, 9 and 10 and table 1.4 in annex 1).

As expected, plant product markets are of significant volumes. The grain market is the largest one (see figures 8, 9 and 10). The average volume of this market was 57.1 million tonnes during 2008-2010. The share of grain export is about 33 percent in the grain marketed output.

Figure 8. Market volumes of main agricultural and food commodities in 2008-2010 (USD million)



Source: Calculations based on RF Federal State Statistics Service and RF Federal Customs Service data

Exports also represent a significant share of the vegetable oil market (19 percent). The average market volume of vegetable oil is 3.0 million tonnes. In contrast, Russia imports relatively large volumes of oilseeds. The share of import in the oilseeds market is 14.2 percent.

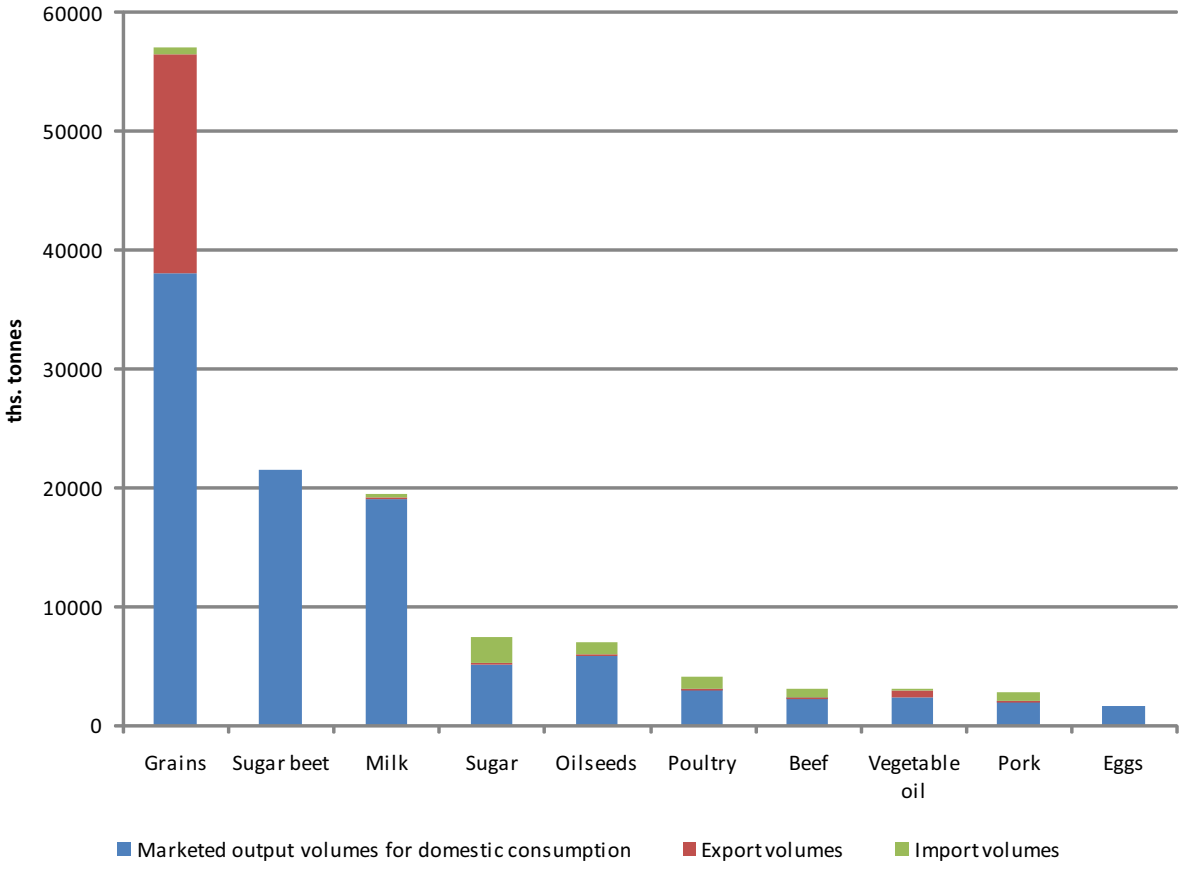
The importance of imports is greatest in the sugar market(29.3 percent). The average market volume of sugar is 7.4 million tonnes.

Meat markets are also characterized by high import shares. The share of imports in the beef market is 25.7 percent, in the pork market 25.9 percent and in the poultry market 23.6 percent. However, meat imports, especially poultry meat, are declining rapidly. The market volumes of poultry meat, beef and pork are 4.1, 3.1 and 2.8 million tonnes respectively.

Both sugar beets and eggs are non-traded commodities. The average marketed output of sugar beets is 21.5 million tonnes and that of eggs is 1.6 million tonnes.

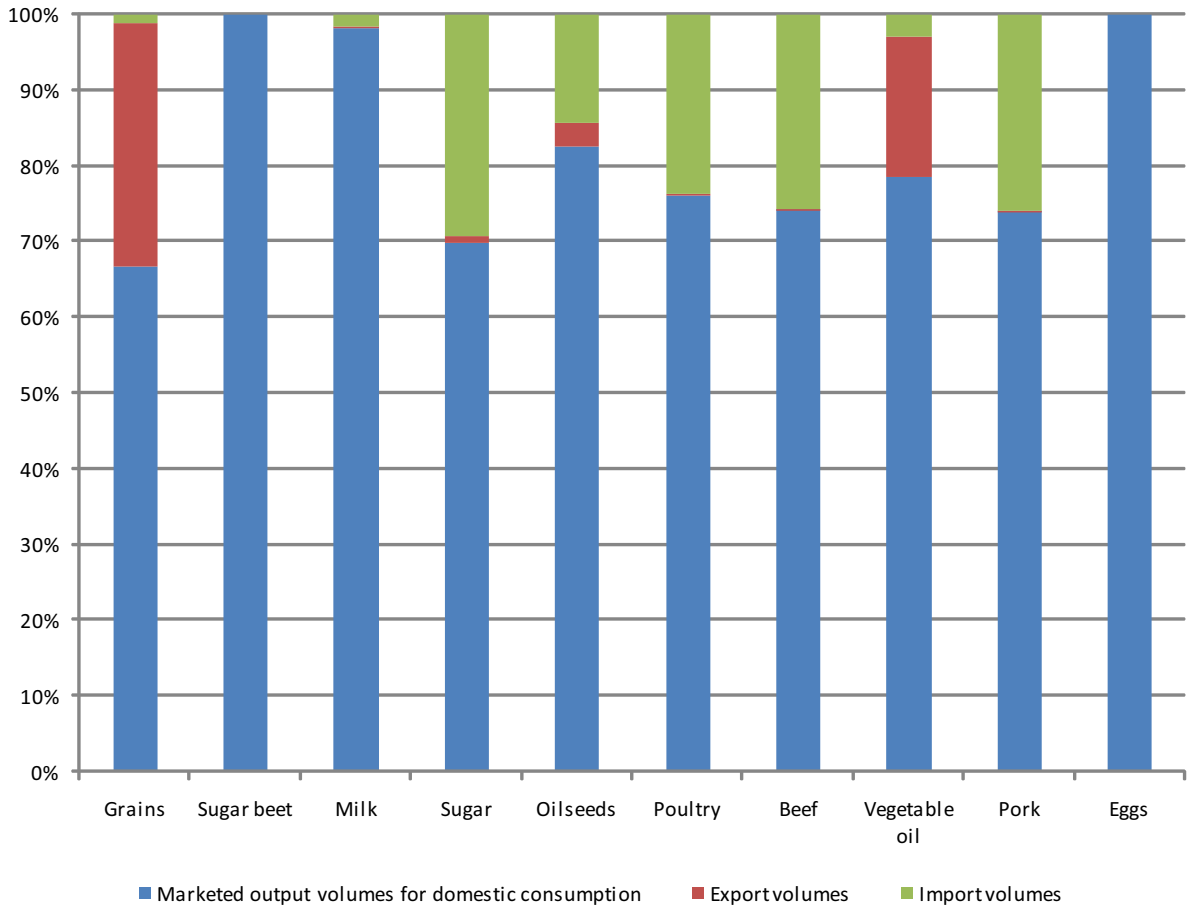
The average market volume of milk is 19.4 million tonnes. Both import and export volumes of milk are not significant.

Figure 9. Components of the average market volumes of main agricultural and food commodities in 2008-2010 (USD million)



Source: Calculations based on RF Federal State Statistics Service and RF Federal Customs Service data

Figure 10. Structure of the average market volumes of main agricultural and food commodities in 2008-2010 (%)



Source: Calculations based on RF Federal State Statistics Service and RF Federal Customs Service data

Russia's growing agricultural and food markets are attractive both for domestic producers and to suppliers from abroad. Considering their competitive advantages and the competitiveness of domestic production, Russia's producers are likely to increase production of oilseeds, vegetable oils and grains. The shares of domestic producers in the markets of animal products (meat and milk) will grow only if investment in livestock production goes up and there is a high level of protection against imports. Protection will also be an important factor in increasing Russia's domestic producers' share in the sugar market.

2. MAJOR CHARACTERISTICS OF RUSSIA'S AGRICULTURAL TRADE

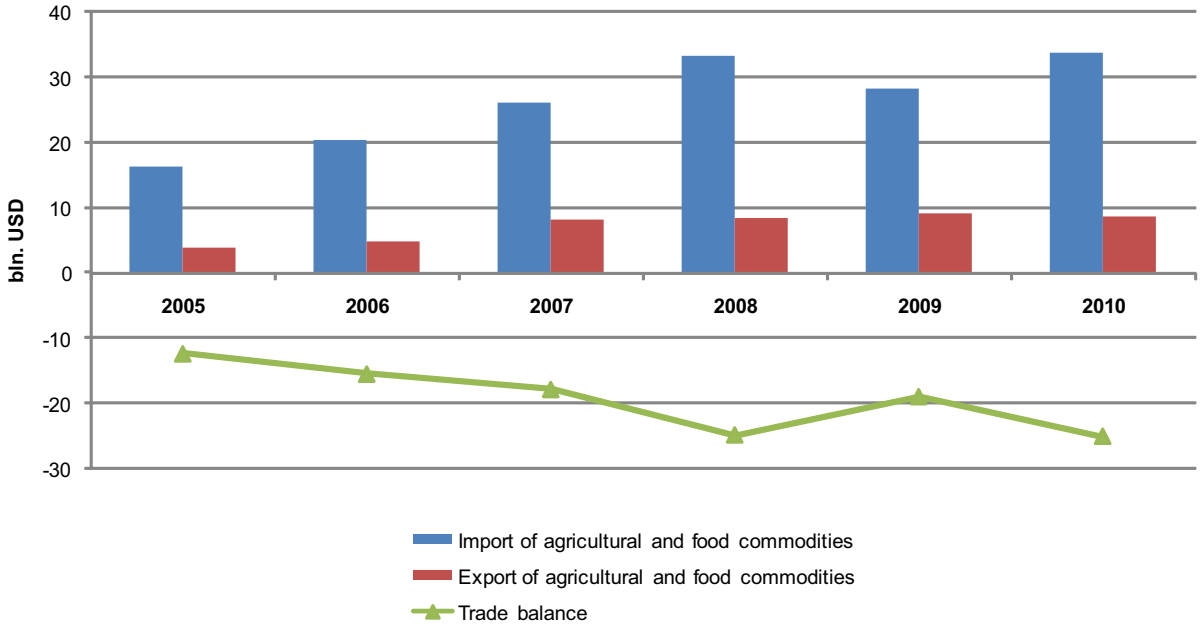
2.1 Russia's Agricultural Trade and its Regulation

2.1.1 Agricultural imports and their regulation

Growth in agricultural production occurred along with an increase of agro-food imports. The increased imports resulted from a real appreciation of the ruble, increased real disposable incomes, increased domestic prices of agricultural products, and a limited capacity to meet consumer demand through domestic production.

During 2008-2010, the values of agricultural and food imports reached a record level. The average total value of agricultural and food imports in this period was USD 31.8 billion. This is almost 52 percent more than in the preceding three-year period of 2005-2007.

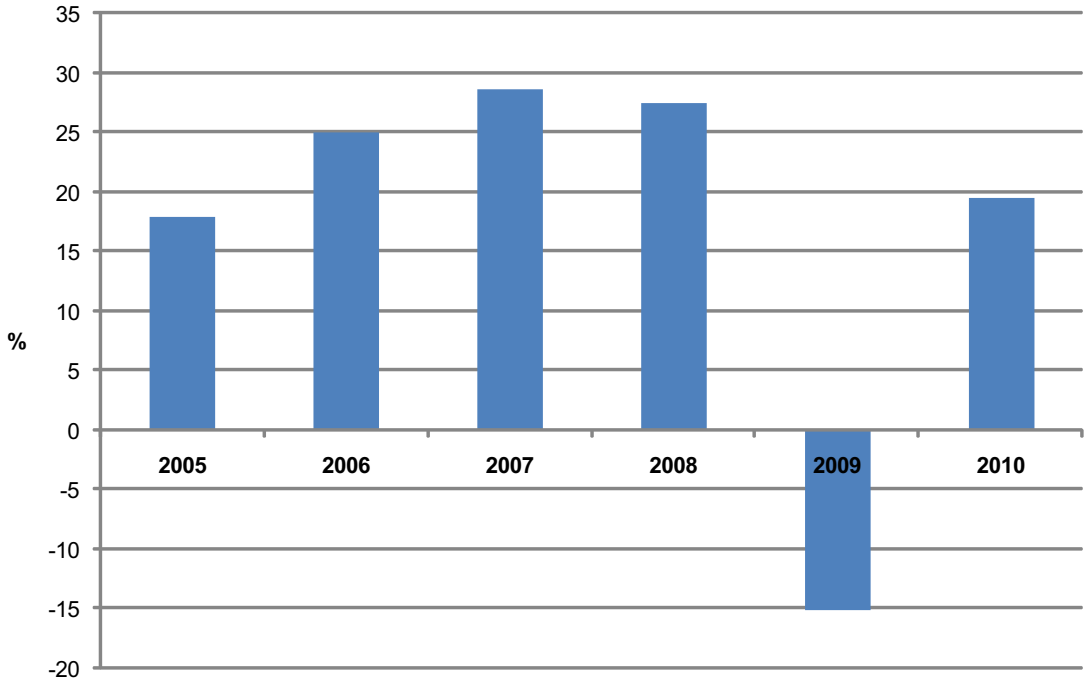
Figure 11. Foreign trade in agricultural and food products in Russia, 2005-2010 (USD billion)



Source: RF Federal Customs Service data

While agro-food imports increased significantly from 2005 to 2010, the rate of increase declined. In 2008, agro-food imports increased by 27.5 percent compared with the previous year. In 2010, the growth rate of imports was 18.8 percent. The 2010 increase in imports followed a 15 percent reduction in 2009 due to a ruble depreciation and an increase in demand for domestic products. In 2010, agro-food imports exceeded their value in 2008 and net imports reached USD 25.2 billion. The share of imports of agricultural and food products in Russia's total imports amounted to 15.5 percent.

Figure 12. Growth rates of imports of agricultural and food commodities in Russia, 2005-2010 (%)

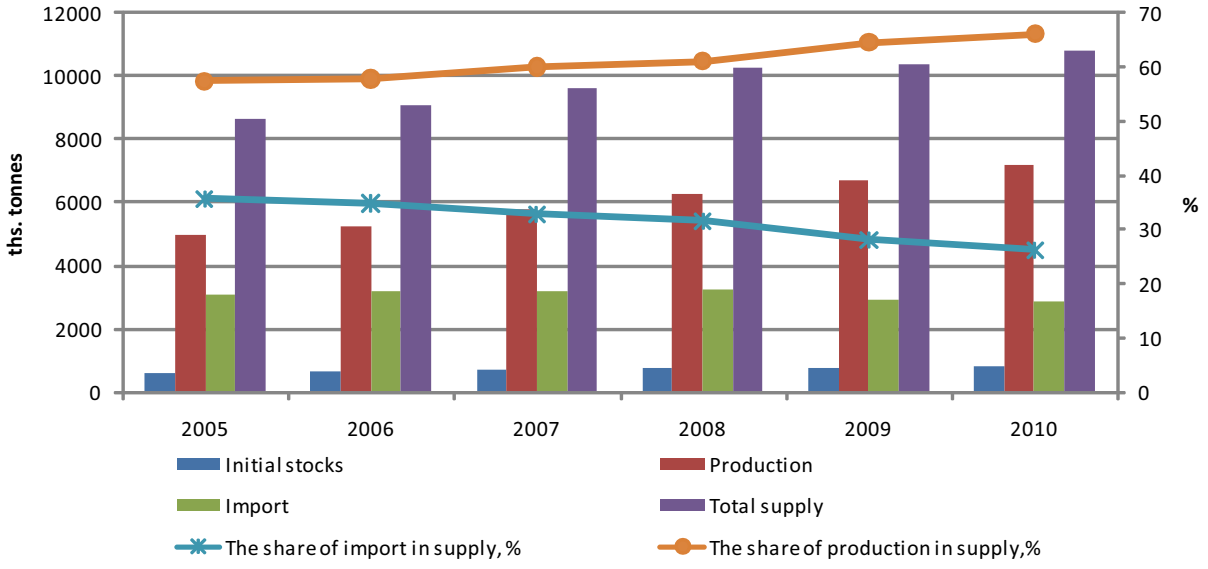


Source: Calculations based on RF Federal Customs Service data

There were no significant changes in the structure of imports by origin in 2008-2010. CIS countries held a share of about 10 percent of agro-food imports in Russia, while the share of other countries was about 90 percent. In addition, the share of agricultural and food imports in Russia's total imports has increased since 2008. This share was 12.5 percent in 2008, 17.6 percent in 2009 and 15.5 percent in 2010.

Meat imports supply a significant share of the Russian meat market. However, the significance of imports in the meat supply is gradually declining as domestic meat production increases (see figure 13 and table 1.5 in annex 1). This is due to the implementation of protective measures for meat import regulation and increasing budgetary support for meat producers. This indicates a redistribution of the market in favour of Russia's producers.

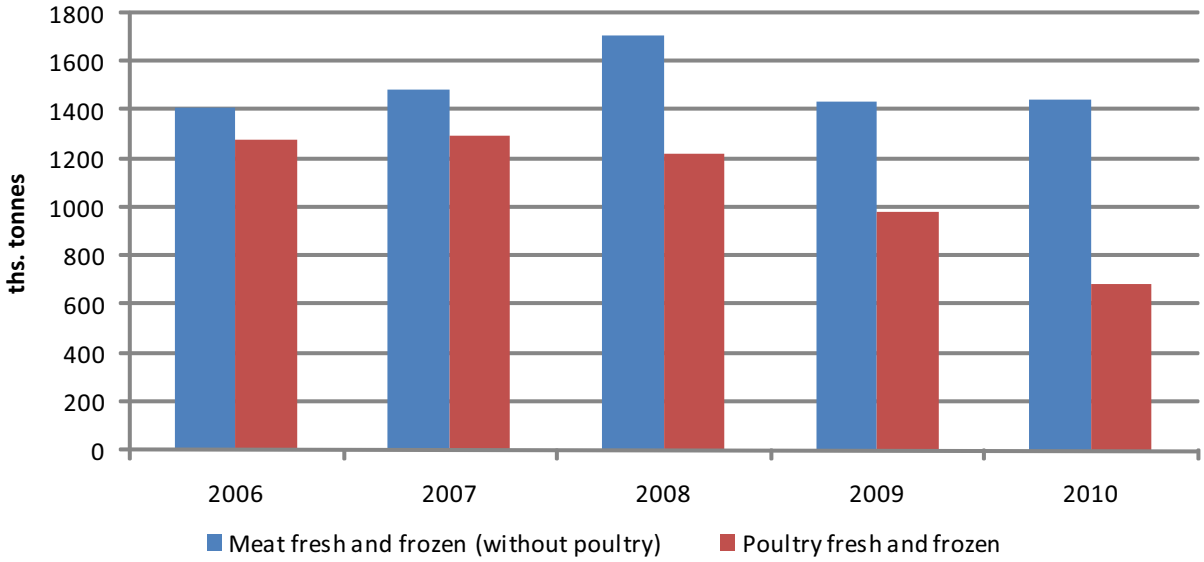
Figure 13. Components of Russia's meat and meat products supply in 2005-2010



Source: Calculated from RF Federal State Statistics Service data

Russia imported meat and meat products (including poultry meat) valued at USD 6.4 billion in 2008, or 19.2 percent of total agro-food imports. The value of imports of meat and meat products in 2009 decreased by 14.3 percent compared to the previous year (to USD 5.5 billion), and in 2010 fell by a further 20.5 percent (to USD 4.4 billion). Also the import volumes of meat decreased significantly (see figure 14 and table 1.6 in annex 1).

Figure 14. Russia's import of meat and poultry in 2006-2010 (thousand tonnes)



Source: RF Federal State Statistics Service data

Meat import in Russia is regulated by tariff rate quotas (TRQ), mostly assigned to the EU and the US. There has been some tightening of TRQ regulation in recent years due to implementation of the policy to support the development of Russia's poultry and swine production. In particular, the TRQ for poultry was reduced considerably over the years 2009-11 and the TRQ for pork was reduced in 2010, after having been increased in 2009.

Table 2. Russia's TRQ (volumes and tariff rates) for beef, pork and poultry in 2008-2011

	Unit	2008	2009	2010	2011
Beef, fresh and chilled					
Volume of TRQ	ths. tonnes	28.9	29.5	30	30
In-quota rates	%	15, but not less than 0.2 euro per kg.			
Out of quota rates	%	45, but not less than 0.6 euro per kg.	40, but not less than 0.53 euro per kg.	50, but not less than 1 euro per kg.	50, but not less than 1 euro per kg.
Beef, frozen					
Volume of TRQ	ths. tonnes	445	450	530	530
In-quota rates	%	15, but not less than 0.15 euro per kg.		15, but not less than 0.2 euro per kg.	15, but not less than 0.2 euro per kg.
Out of quota rates	%	50, but not less than 0.5 euro per kg.	40, but not less than 0.4 euro per kg.	50, but not less than 1 euro per kg.	50, but not less than 1 euro per kg.

Table 2. *Continued*

	Unit	2008	2009	2010	2011
Pork fresh, chilled and frozen					
Volume of TRQ	ths. tonnes	493.5	531.9	472.1	472.1
In-quota rates	%	15, but not less than 0.25 euro per kg.			
Out of quota rates	%	60, but not less than 1.0 euro per kg.	75, but not less than 1.5 euro per kg.	75, but not less than 1.5 euro per kg.	75, but not less than 1.5 euro per kg.
Meat and edible offal of poultry, fresh, chilled and frozen					
Volume of TRQ	ths. tonnes	1211.6	952	780	350
In-quota rates	%	25, but not less than 0.2 euro per kg.			
Out of quota rates	%	60, but not less than 0.48 euro per kg.	95, but not less than 0.8 euro per kg.	80, but not less than 0.7 euro per kg.	80, but not less than 0.7 euro per kg.

Source: Russia's customs legislation for 2008-2011

The growing demand for beef in Russia, in the face of limited capacity for domestic production and import substitution, fuelled the further expansion of beef import volumes in 2008-2011.

In the milk market, protective measures were activated as a result of increased imports and falling producer prices of milk in 2008. The specific component of the compound rate of import duty on butter was increased from €0.22 to €0.35 per kilogramme in early 2009, while the *ad valorem* rate was kept at 15 percent. The duty on milk powder was increased from 15 to 20 percent of its customs value. At the end of September 2009, Russia increased the import duties on cheese.

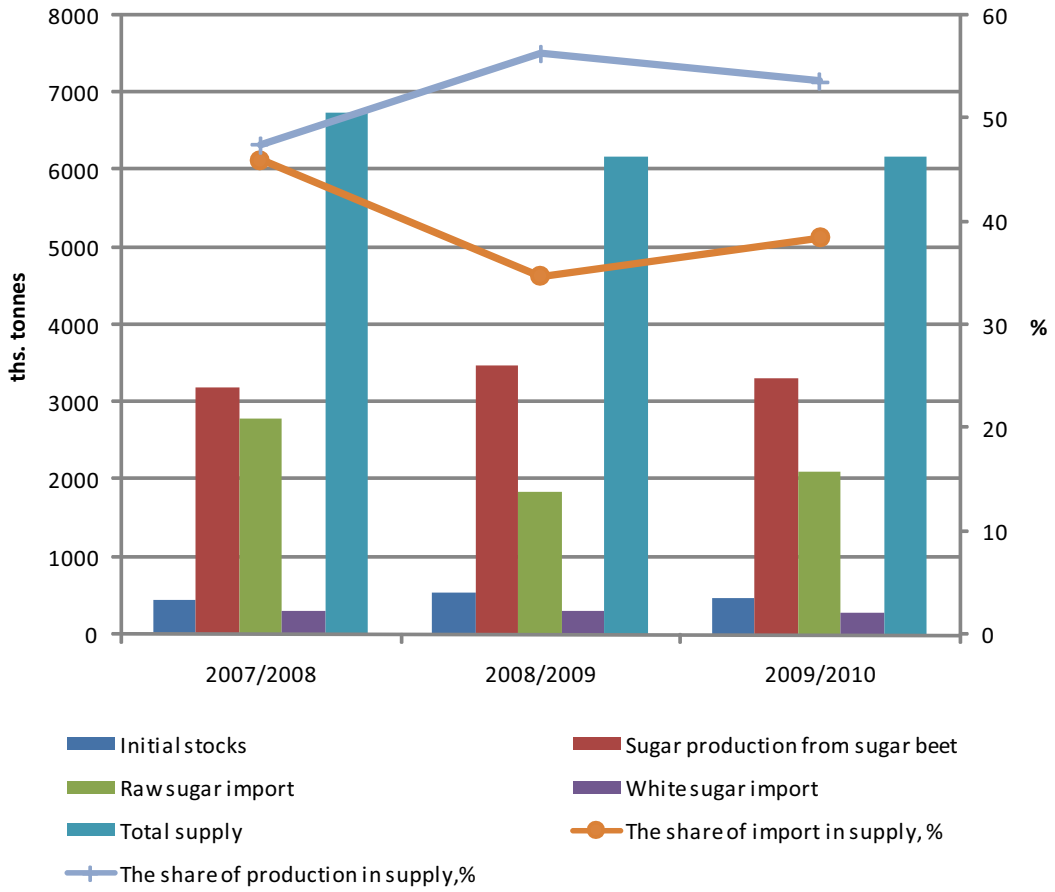
In August 2010, the Commission of the Customs Union of Russia, Belarus and Kazakhstan decided to increase the import duty on milk powder to 25 percent of customs value and also the specific component of compound tariffs: milk whey from €0.3 per kilogramme to €0.35 per kilogramme, butter from €0.35 per kilogramme to €0.4 per kilogramme, and cheese (processed and other varieties) from €0.5 per kilogramme to €0.6 per kilogramme. These increases meant that protection against imports of certain types of dairy products could be provided in spite of the fall in the value of the euro against the Russian ruble in 2010.

Import duties on certain types of tropical oils used in the food industry instead of milk fat were raised from zero to ten percent of customs value in mid-June 2009. This was due to the expansion of the milk market.

Most of the milk powder imported by Russia from the CIS countries has been subject to a duty-free regime. In early June 2009, Russia proposed amending the so-called forecast balances[6] for milk in order to restrict import of milk powder from Belarus. As a result, the consignments of Belarusian milk powder were reduced (from 110 thousand tonnes to 70 thousand tonnes), and cheese and curd consignments were expanded (from 100 thousand tonnes to 132 thousand tonnes).

Import of sugar is a significant component of Russia's sugar supply (see figure 15 and table 1.7 in annex 1). Sugar is imported because domestic production is insufficient.

Figure 15. Components of sugar supply in Russia



Source: USDA data

Russia is a net importer of raw sugar. Therefore, government regulation plays a special role in the sugar trade. However, there is a downward trend in raw sugar imports. The raw sugar import volume was 51.8 percent in calendar year 2009 compared with the volume in 2008. This drop was caused by the increase in import prices and by Russia's seasonal duty on raw sugar imports. At the same time, imports of white sugar grew by 56.8 percent. The import of raw sugar in 2010 exceeded the 2009 volume by 1.7 times (2086.3 thousand tonnes instead of 1,253.3 thousand tonnes). The import of white sugar increased slightly in 2010 compared to 2009.

Table 3. Russian export and sugar imports in 2008-2009

	Import				Export			
	2008		2009		2008		2009	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
	thousand tonnes million USD	thousand. tonnes	million USD	thousand tonnes million USD	thousand tonnes million USD	thousand. tonnes	million USD	thousand tonnes million USD
Raw sugar	2419.9	944.2	1253.3	507.3	53.5	25.3	133.7	56.7
White sugar	165.1	87.4	258.9	147.3				

Source: RF Federal Customs Service data

Since January 2010, Russia's import duties on raw sugar have been determined by the price fluctuations of raw sugar at the New York Mercantile Exchange (NYMEX) in the range of USD 286.60 – 396.83 per tonne. When the raw sugar price exceeds the level of USD 396.83 per tonne the import duty is USD 140 per tonne. The import duty increases if prices decline. The maximum value of import duty is USD 270 per tonne. It is used if the price for raw sugar does not exceed the level of USD 286.60 per tonne.

A reduced duty on raw sugar is usually applied from 1 May to 31 July. During this period, the import duty amounts to USD 50 per tonne if the raw sugar quota is over USD 485.02 per tonne, with a maximum import duty of USD 250 per tonne – applied if the price for raw sugar does not exceed USD 286.6 per tonne.

In addition, since May 2010 the monitoring period of prices on raw sugar at the NYMEX has been reduced from three months to one month. This has helped to make customs regulation more responsive to changes in the global sugar market.

Belarus remains the main supplier of white sugar to Russia. Imports of white sugar are regulated by the agreement between Russia and Belarus. Imports of Belarusian sugar to Russia amounted to 100,000 tonnes in 2008. The agreed amount of sugar imports to Russia increased to 150,000 tonnes per year in 2009 and 2010. The supply of sugar from Belarus was fixed at 200,000 tonnes in 2011.

The regulation of agro-food imports therefore relied on both tariff and non-tariff measures in 2008-2010. One of the important non-tariff measures was the coordination of the forecast balances (quotas) between Russia and Belarus for the supply of meat and meat products, milk and dairy products, and sugar. Other important measures used to restrict imports from non-CIS countries were meat tariff quotas and the floating duty on raw sugar.

2.1.2 Agricultural exports and their regulation

Russia remains a net importer of agricultural and food products. However, Russia's agro-food exports have been growing alongside the increase in imports (see figure 11). Since 2002, Russia has become one of the largest suppliers of grain to the world market. In addition, the modernization of the food industry has contributed to increasing Russia's exports of beer, ice cream, dairy and meat products.

The value of agro-food exports reached a record high of USD 9.3 billion in 2009. The share of agro-food exports in Russia's total exports was 2.3 percent in 2008-2010. More than two thirds of Russian agro-food exports were destined for non-CIS countries.

Grains (mainly wheat) occupy the largest share in the value of Russia's agro-food exports. However, in 2008 and 2010 exports of grain were significantly below the potential volumes due to Russia's application of export restrictions. Prohibitive duties on exports of wheat and meslin (40 percent, but not less than €105 per tonne) and a ban on export to Belarus and Kazakhstan were applied between 1 February and 30 June 2008. Earlier, in November 2007, restrictive duties on exports of barley (30 percent, but not less than €70 per tonne) and on wheat and meslin (ten percent, but not less than €22 per tonne) from Russia to countries other than Belarus and Kazakhstan were established.

The problem of supporting grain exports has acquired particular importance due to the record harvest in 2008 and the convergence of domestic and world prices. In late 2008, a discussion was therefore begun on the possibility of subsidizing grain exports, reducing the tariffs (freight rates) on railway transportation and grain handling at ports, and accelerating value-added tax (VAT) refunds for the main grain exporting companies. However, the currency depreciation in late 2008 and early 2009 delayed the introduction of export subsidies. At the same time, there was a double reduction of the tariffs for the railway transportation of grains and products of the milling industry until 30 June 2009. In 2009, these preferential tariffs were extended until 31 March 2010.

Due to abnormal drought and the associated significant decrease in grain yields, Russia

introduced a ban on exports of wheat and meslin, rye, barley, maize, and wheat flour from 15 August 2010 to 31 December 2010. In October 2010 the ban on the export of wheat and meslin, rye, barley, and maize was extended until 30 June 2011.

There is therefore a direct interdependence between the policies for grain exports and the availability of grains in the domestic market. At the same time, the support for exports takes the form of discounts on railway transportation of grains. To restrict grain exports Russia has used both tariffs and non-tariff measures (export bans).

2.2 Russia's Agricultural and Food Trade

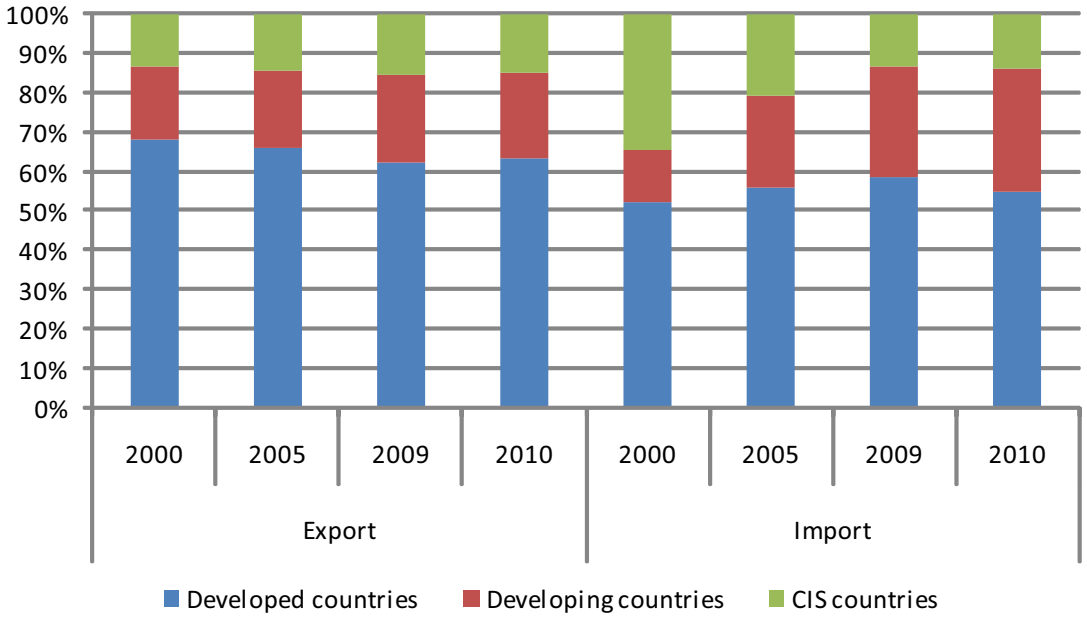
2.2.1 General characteristics of Russia's agricultural and food trade

Russia's trading partners have been grouped in three categories: developed countries, developing countries and CIS countries. The CIS countries were separated out because of the special historical and economic relations between Russia and these countries (Customs Union of Russia, Belarus and Kazakhstan; free trade agreements between Russia, Ukraine, Armenia, Kyrgyzstan, Moldova and Tajikistan).

As figure 16 shows, the share of developing countries in the value of Russia's exports is over 20 percent and relatively stable. CIS countries account for about 15 percent. Developed countries represent the main destination for Russia's exports in value terms.

The share of imports from developing countries in Russia's total import value is increasing steadily. It was 13.1 percent in 2000 and 31.4 percent in 2010. In contrast, the share of imports from CIS countries decreased from 34.3 percent in 2000 to 13.8 percent in 2010. The share of imports from developed countries is relatively stable.

Figure 16. The structure of Russian trade with developed, developing and CIS countries

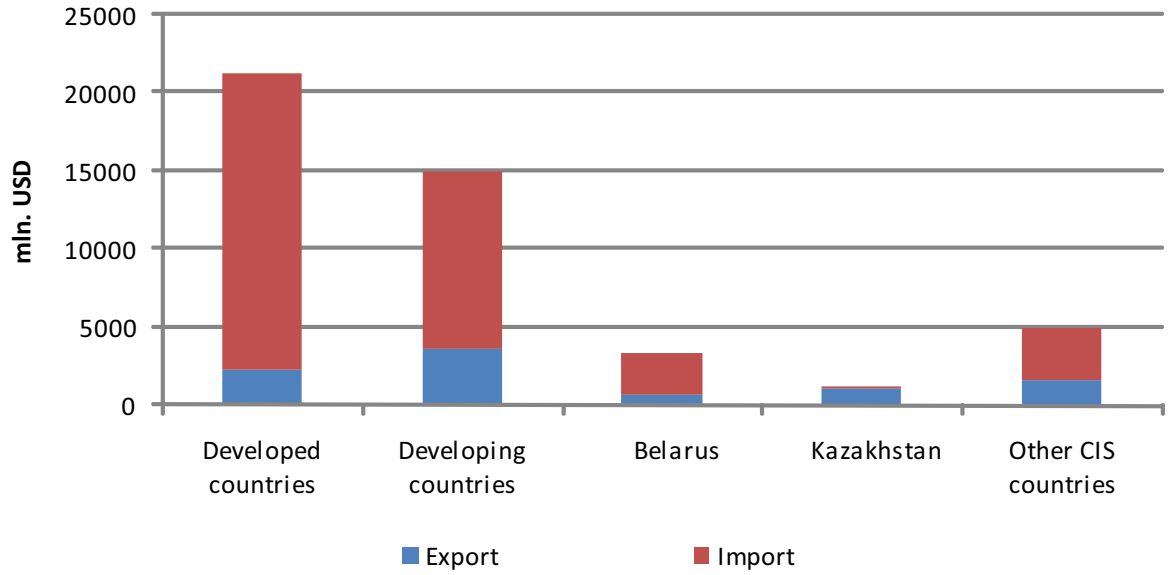


Source: Calculations based on RF Federal Customs Service data

Nearly half of Russian exports to and imports from CIS countries are accounted for by Belarus and Kazakhstan (see table 1.8 in annex 1).

Developing countries dominate over CIS countries in the value of Russia's agricultural trade (see figure 17 and table 1.9 in annex 1). In 2010, Russia's agricultural exports to developing countries accounted for 39 percent of the total value of agricultural exports. The share of agricultural imports from developing countries to Russia amounted to more than 31 percent.

Figure 17. Russia's agricultural and food trade with developed, developing and CIS countries in 2010 (USD million)

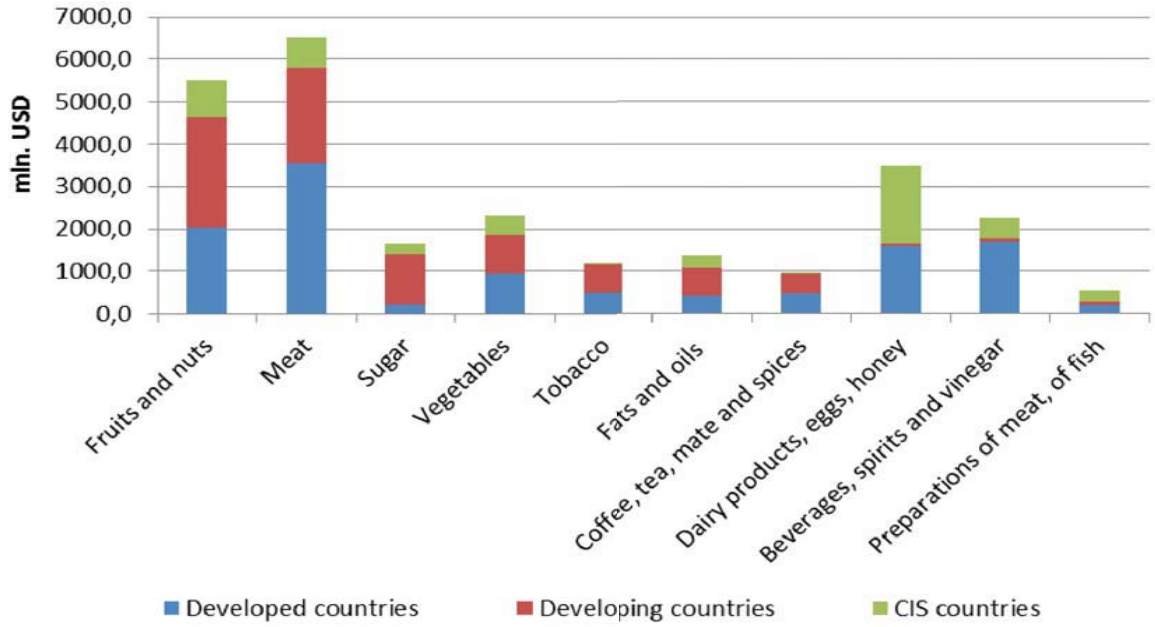


Source: Calculations based on RF Federal Customs Service data

The share of Russia's supplies of agricultural products to the CIS countries accounts for about 36 percent of total exports of agricultural and food products. About 20 percent of Russia's agricultural exports was destined for Belarus (7.2 percent) and Kazakhstan (12 percent). The share of agricultural and food imports from CIS countries in Russia's total agricultural and food imports amounts to 17 percent. A substantial share of imports comes from Belarus (7.4 percent). The imports from Kazakhstan are insignificant.

In terms of individual commodity groups, the largest values of imports from developing countries in 2010 were those of fruits and nuts (USD 2,604.8 million), meat (USD 2,228.2 million), sugar (USD 1176.3 million), vegetables (USD 903.2 million), tobacco (USD 666.6 million), and fats and oils (USD 654.4 million) (see figure 18 and table 2.1 in annex 2). Imports from developing countries make up a significant share of Russia's total imports of these commodity groups (see figure 19). For example, imports from developing countries accounted for more than 70 percent of all of Russia's imports of sugar, more than 55 percent for tobacco, and more than 47 percent for fruits and nuts. Also, the developing countries are important suppliers of coffee, tea, mate and spices in Russia's market.

Figure 18. Russia's imports of main agricultural and food commodity groups from developed, developing and CIS countries in 2010 (USD million)

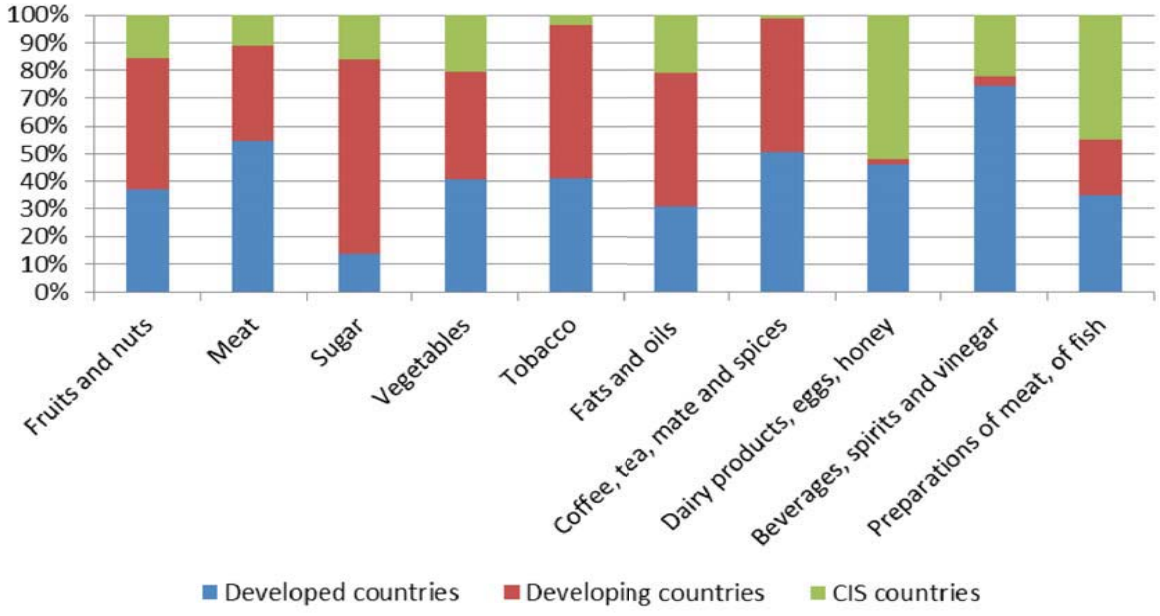


Source: RF Federal Customs Service data

Russia's imports of dairy products, eggs and honey are characterized by the high share (52.3 percent) and value (USD 1,825.3 million) of imports from CIS countries. Belarus is the main supplier of dairy products to Russia.

Among the remaining agricultural and food commodity groups, the main imports from CIS countries are those of fruits and nuts (USD 864.3 million), meat (USD 719.5 million), and beverages, spirits and vinegar (USD 495.9 million). However, the share of imports from the CIS countries in Russia's imports of these commodity groups is not significant.

Figure 19. Structure of Russia's imports of main agricultural and food commodity groups from developed, developing and CIS countries in 2010 (%)



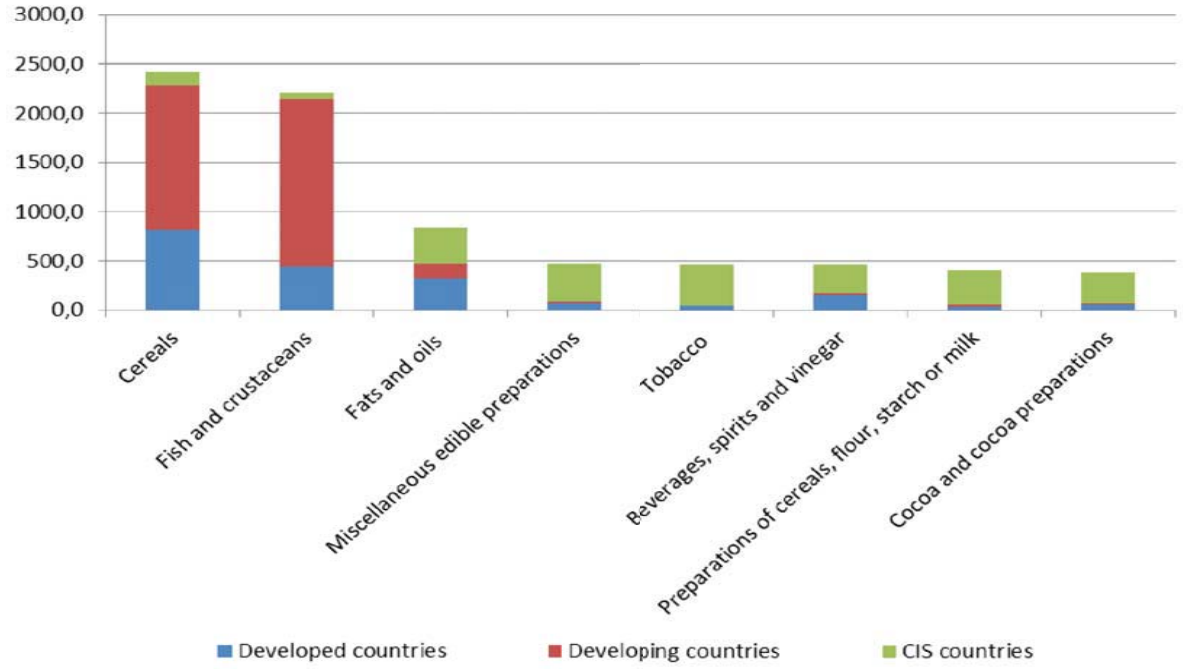
Source: Calculations based on RF Federal Customs Service data

A considerable portion of Russia's imports from the CIS countries consists of preparations of meat, of fish (45.1 percent) and products of the milling industry (40.5 percent). A substantial share of imports of these product groups comes from Belarus.

In general, Russia's imports of agricultural and food products are therefore characterized by a low degree of substitution between goods from developing and from CIS countries. This is due to the specific characteristics of the goods concerned and the limited capacity of CIS countries to meet Russia's demand. The meat commodity groups probably exhibit the highest degree of substitution between CIS and developing country origins.

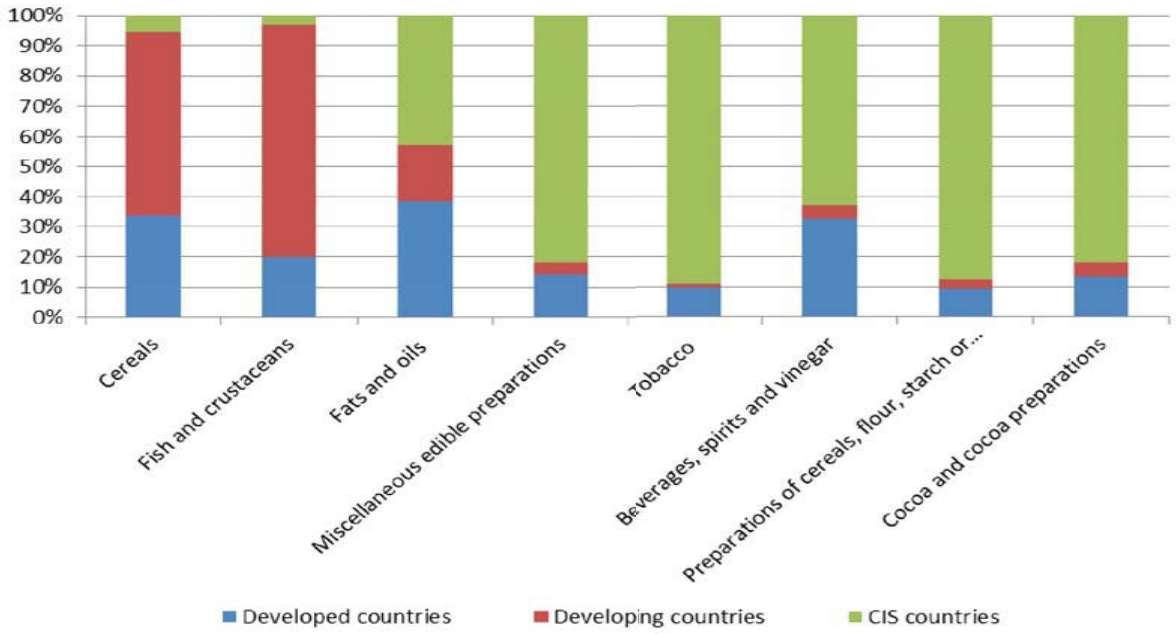
Russia's main exports of agricultural and food products are cereals, fish and crustaceans, and fats and oils (see figures 20-21 and table 2.2 in annex 2). Substantial shares of the exports of fish and crustaceans (77.2 percent) and cereals (60.7 percent) are destined for developing countries. The bulk of the exports of fats and oils (42.9 percent) and other commodities is supplied to the CIS countries.

Figure 20. Russia's exports of main agricultural and food commodity groups to developed, developing and CIS countries in 2010 (USD million)



Source: RF Federal Customs Service data

Figure 21. Structure of Russia's exports of main agricultural and food commodity groups to developed, developing and CIS countries in 2010 (%)



Source: Calculations based on RF Federal Customs Service data

2.2.2 Russia's agricultural and food imports originating from developing countries

Meat, sugar, wine, rice, tea, coffee, fruit and tobacco are the main agricultural and food commodities imported from developing countries.

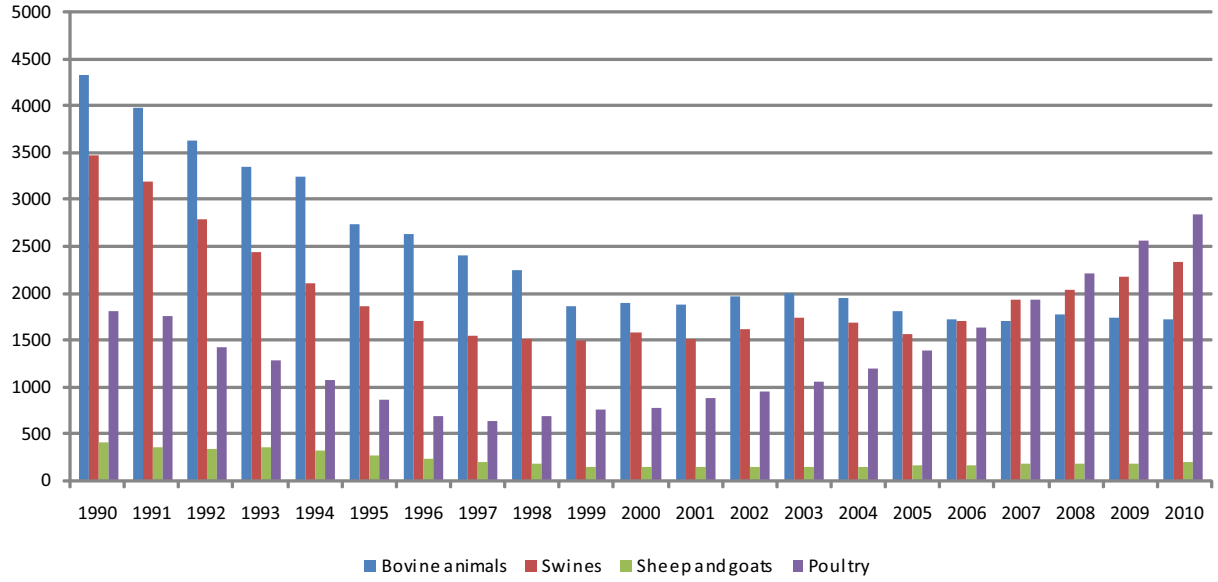
Import of meat

Over a long period up until 2000, meat production and livestock numbers in Russia were declining. This was due to several reasons, including the low profitability of meat production; a shortage of mixed feed, and rising feed prices; little budgetary support for meat production in a situation of social and economic crisis and budgetary deficit; low competitiveness of domestic meat production and large imports of meat and meat products; low real incomes and food consumption; an unfavorable economic situation in agriculture and a growing gap between prices for agricultural output and inputs.

After 2000, the annual growth rate of domestic meat production averaged 6.0 percent. Depreciation of the ruble, growth in consumer demand and an increase in grain production created competitive advantages for Russia's meat producers. Moreover, industries producing mixed feed and processing meat began to grow. These factors, along with the increase in budgetary support and border protection, contributed to the recovery of domestic meat production.

Rather high rates of growth have been observed since 2006 after the beginning of the implementation of the National Priority Project on "Development of the Agro-Industrial Complex". The measures implemented by federal authorities include the development of short-term and long-term credit, application of TRQ on meat imports, and cancellation of import duties on equipment for the livestock industry, which facilitates larger investments in building, reconstruction and modernization of livestock enterprises.

Figure 22. Russia's cattle and poultry production in slaughter weight (thousand tonnes)

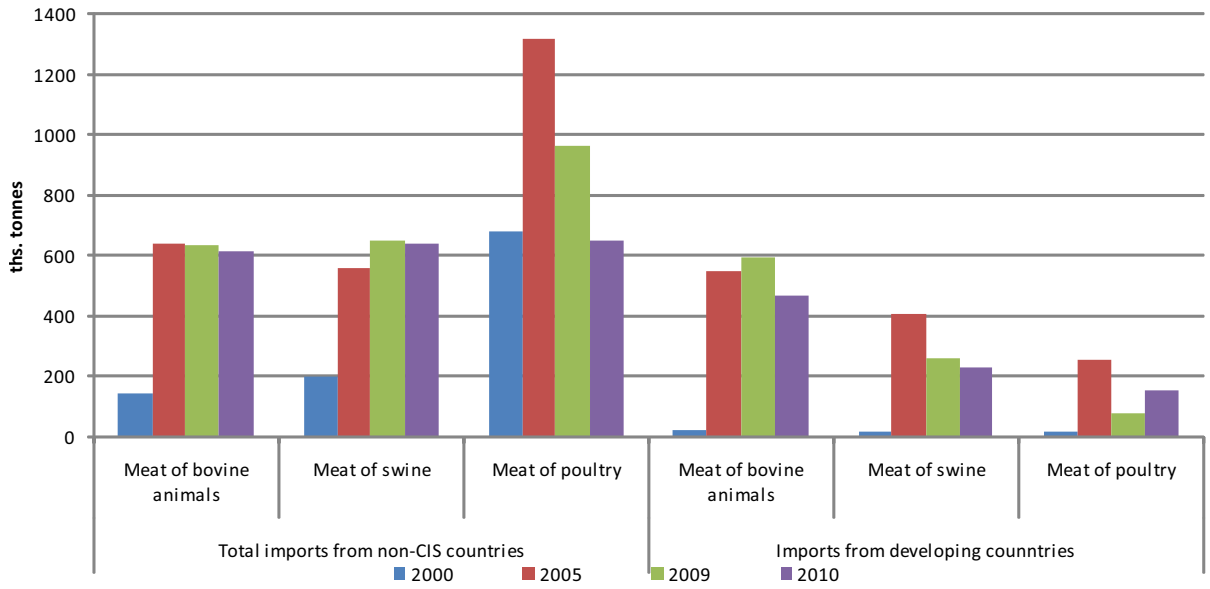


Source: RF Federal State Statistics Service data

The growth in meat production was accompanied by a substantial increase in meat imports (see figure 23). In 2010, the imports of meat of bovine animals were 4.4 times higher than in 2000, and imports of swine meat were 3.2 times higher. The tendency to import more poultry meat was replaced by a rapid reduction in such imports after 2005. An especially large reduction in imports of poultry meat was observed in 2009, 2010 and 2011, due to the imposition of trade restrictions (see table 2) and tougher requirements of a technical character[7]. The reduction in imports of poultry meat mainly affected imports from the US.

The volumes of imports from both developed and developing non-CIS countries of the three main kinds of meat (bovine, swine and poultry) were about equal in 2010. The imports of each kind of meat were a little more than 600,000 tonnes.

Figure 23. Russia's meat imports in 2000, 2005, 2009 and 2010 (thousand tonnes)



Source: Calculations based on RF Federal Customs Service data

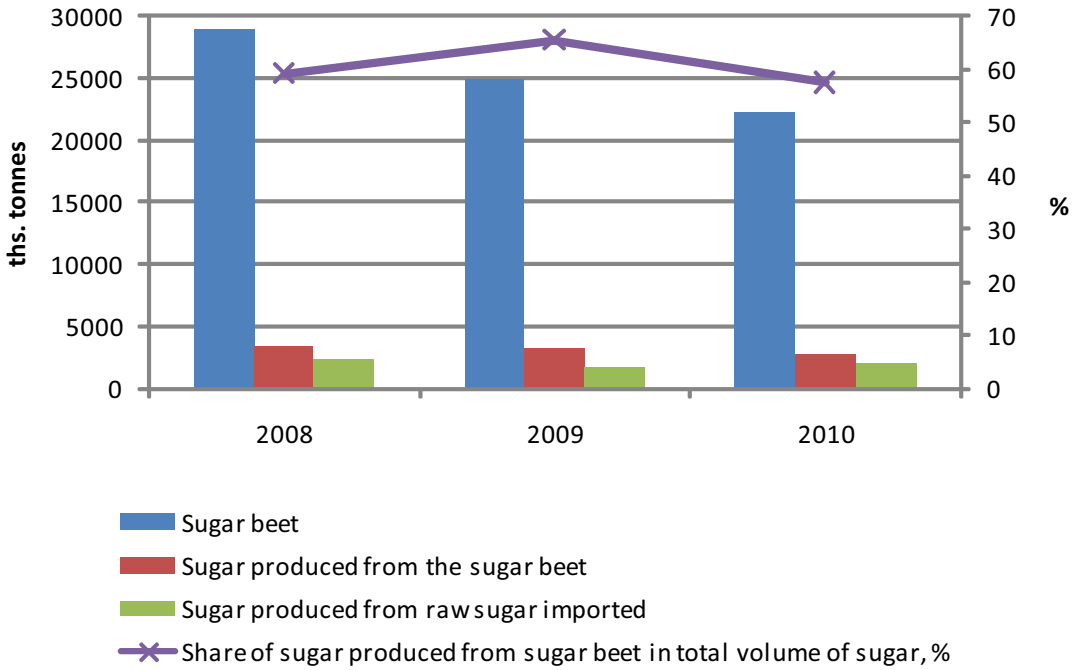
Meat imports from developing countries are characterized by the same tendencies as meat imports overall. Developing countries have strengthened their positions in Russia's market considerably. In 2010, the share of developing countries in Russia's imports of meat of bovine animals, swine, and poultry from non-CIS countries increased to 76.0, 35.3 and 23.2 percent, respectively, from 15.8, 8.6, and 2.4 percent in 2000 (see annex 3, tables 3.1-3.6).

Brazil is the main supplier of meat from developing countries in Russia's market. In 2010, the share of Brazil in Russia's imports of meat of bovine animals, swine and poultry from developing countries amounted to 60.9, 99.3, and 94.6 percent, respectively. Uruguay, Paraguay and Argentina are also large suppliers of meat of bovine animals.

Sugar Imports

Despite the overall decline in sugar production (see figure 24), the share of sugar produced from sugar beets is growing. In 2008, the share of sugar produced from sugar beets reached a record level of 65.5 percent (the remaining 34.5 percent of sugar was produced from raw sugar). The rapid growth of sugar production from domestic raw materials was the result of border protection; increased productivity in the sugar industry (in 2009, the extraction rate of sugar from sugar beets reached a record level of 15.0 percent); and increased sugar beet acreage.

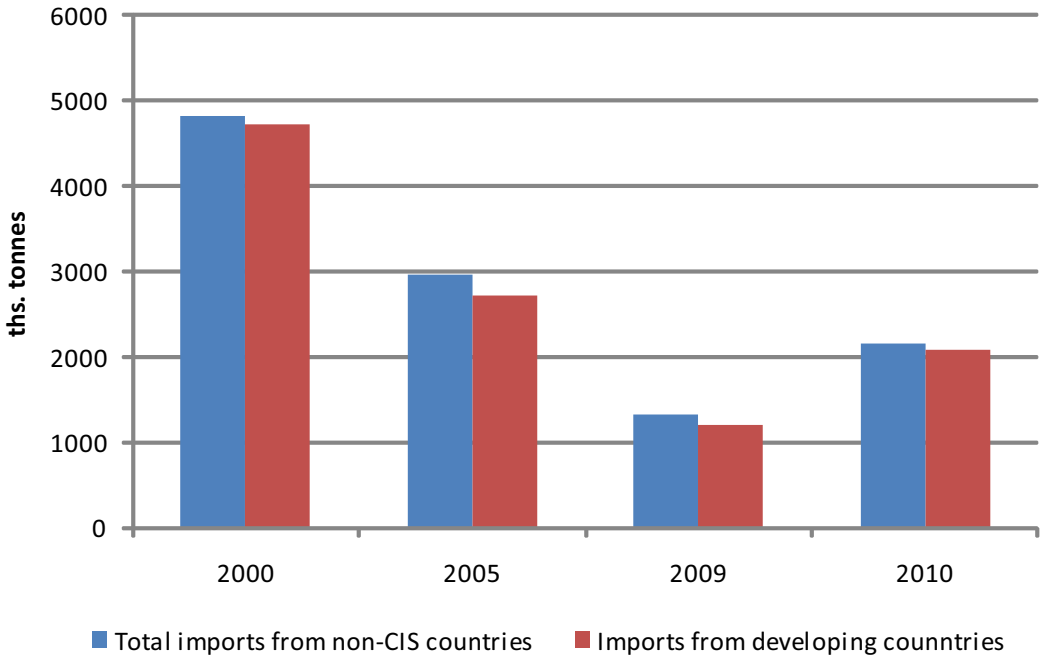
Figure 24. Production of sugar and sugar beets in Russia in 2008-2010 (thousand tonnes)



Source: Calculations based on RF Federal State Statistics Service data.

The growth in sugar production from domestic raw materials was accompanied by a substantial reduction in sugar imports (see figure 25). The lowest volume of sugar imports was observed in 2009. The level of annual sugar imports will possibly remain at about 2.0 million tonnes in the near future.

Figure 25. Russia's sugar import in 2000, 2005, 2009 and 2010 (thousand tonnes)



Source: Calculations based on RF Federal Customs Service data

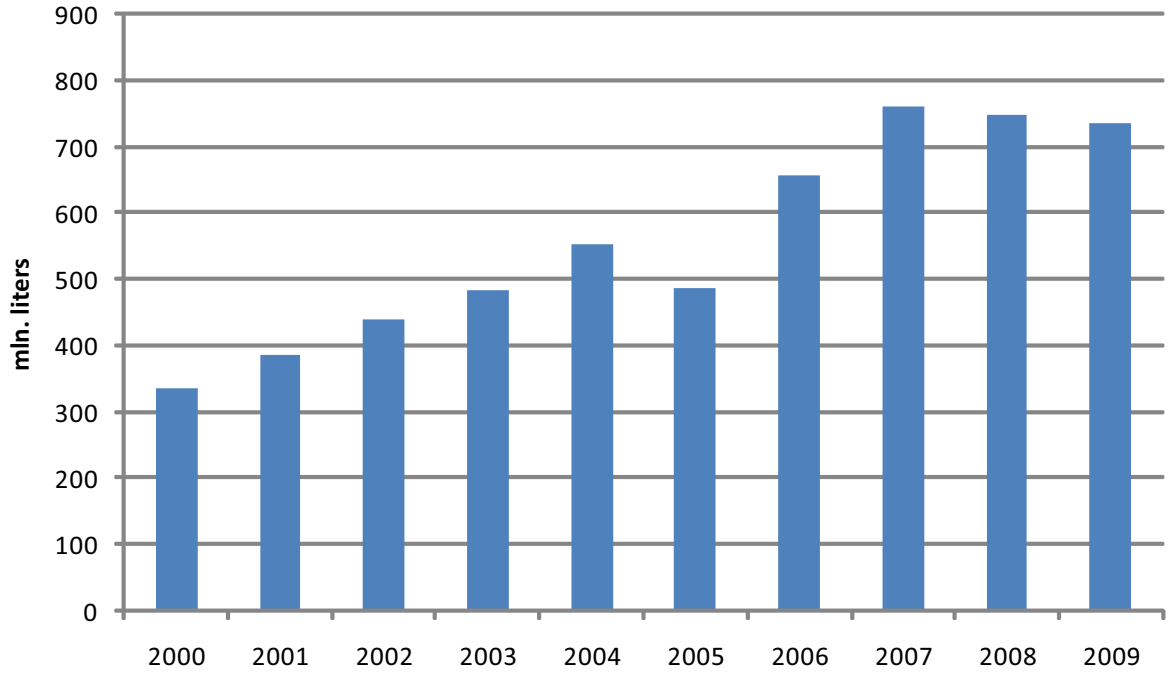
Almost all raw sugar is imported from developing countries (see annex 3, tables 3.7-3.8). Brazil is the main sugar supplier. In 2010, the share of Brazil in Russia's imports of sugar from developing countries was 85.8 percent. Imports of sugar from Cuba declined substantially, while Guatemala and Argentina strengthened their positions in Russia's sugar market.

Wine Imports

Growth in Russia's wine production was accompanied by a steady increase in wine imports. In 2010, Russia's imports of wines (more than 400 million litres) were almost 11 times higher than in 2000.

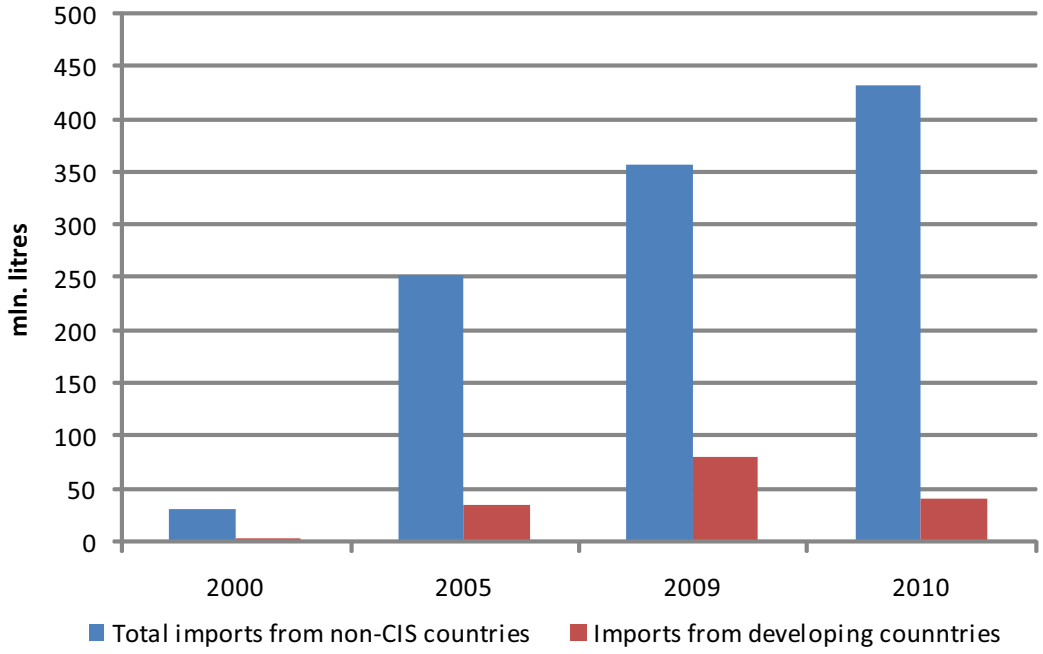
The share of developing countries in Russia's wine imports from non-CIS countries is not significant (see annex 3, tables 3.9-3.10). It was less than ten percent in 2010. The main suppliers of wine to Russia from developing countries are Chile, Brazil, South Africa and Argentina.

Figure 26. Wine production in Russia in 2000-2009 (million litres)



Source: RF Federal State Statistics Service data.

Figure 27. Russia's wine import in 2000, 2005, 2009 and 2010 (million litres)

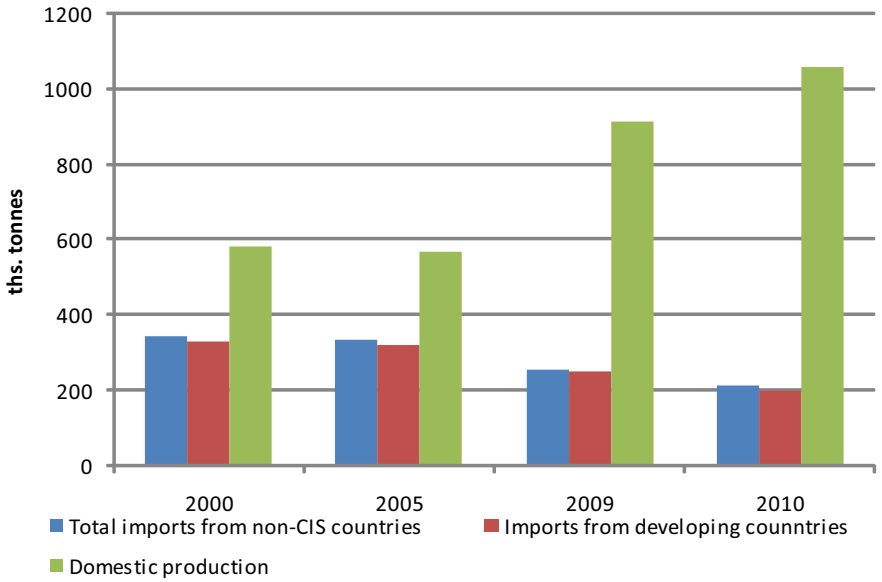


Source: Calculations based on RF Federal Customs Service data

Rice Imports

Rice production in Russia has been growing, accompanied by a substantial reduction in rice imports (see figure 28). The volume of rice imports in 2010 was less than 60 percent of the level in 2000. The lowest level of rice imports was observed in 2009.

Figure 28. Russia's imports and domestic production of rice in 2000, 2005, 2009 and 2010 (thousand tonnes)



Source: Calculations based on RF Federal Customs Service and RF Federal State Statistics Service data

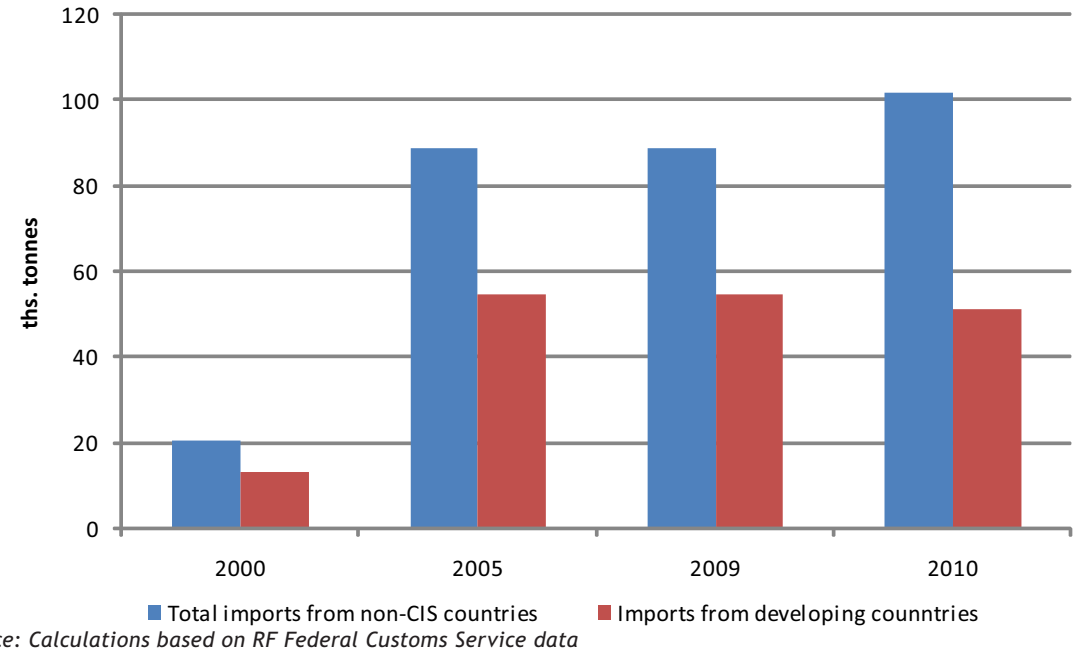
Developing countries supply almost all the rice imported by Russia from non-CIS countries (see annex 3, tables 3.11-3.12). Vietnam, Thailand, Pakistan, and China are the main suppliers. Except for China, these countries have all strengthened their positions in Russia's market.

Coffee Imports

A gradual increase in the volumes of coffee imported to Russia can be observed throughout 2000-2010 (see figure 29). In 2010, imports of coffee exceeded 100,000 tonnes, five times larger than the import level in 2000.

However, the share of developing countries in the imports of coffee to Russia from non-CIS countries has fallen (see annex 3, tables 3.13-3.14). Brazil and Indonesia were the main developing country suppliers of coffee to Russia's market in 2010. The volumes of coffee imported from India declined significantly compared to those recorded for 2000.

Figure 29. Russia's imports of coffee in 2000, 2005, 2009 and 2010 (thousand tonnes)

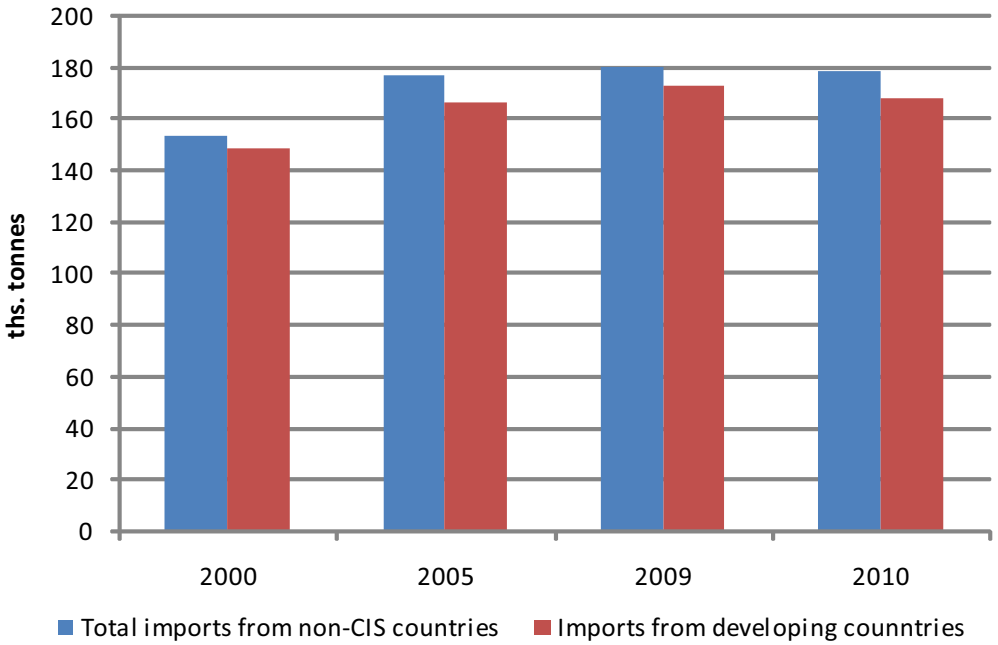


Source: Calculations based on RF Federal Customs Service data

Tea Imports

Imports of tea increased by 24,700 tonnes (16.1 percent) in 2010 compared to 2000. Almost all tea imports come from developing countries (see figure 30 and tables 3.15-3.16 in annex 3). Sri Lanka and India are the main suppliers. From 2000 to 2010, the share of Sri Lanka in Russia's tea imports from developing countries rose from 18.6 to 32.4 percent, but India's share dropped from 76.5 to 11.7 percent. The supply of tea from China, Vietnam, Kenya and Indonesia increased significantly.

Figure 30. Russia's imports of tea in 2000, 2005, 2009 and 2010 (thousand tonnes)

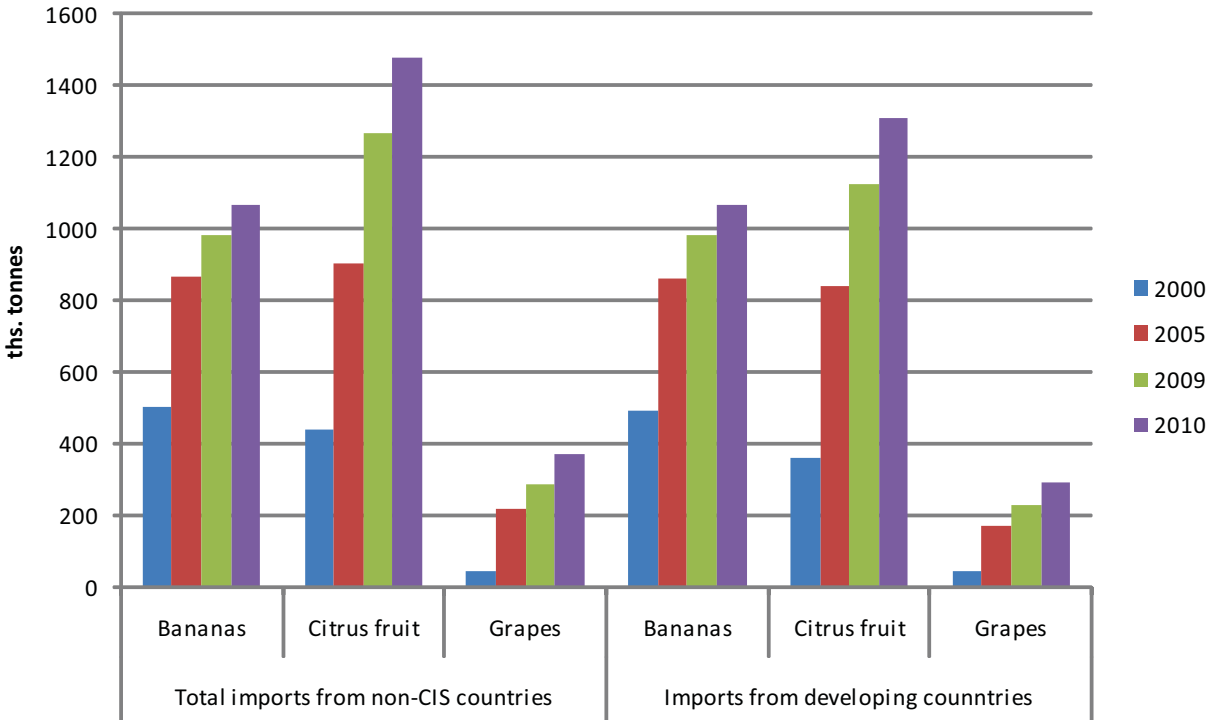


Source: Calculations based on RF Federal Customs Service data

Fruit Imports

Imports of various fruits to Russia increased gradually from 2000 to 2010 (see figure 31). Imports of bananas in 2010 were 2.1 times the 2000 level, citrus fruits 3.4 times, and grapes 8.2 times. Most of the fruit is imported from developing countries (see annex 3, tables 3.17-3.22). The share of developing countries in Russia's total imports of bananas from non-CIS countries is 100 percent, in citrus fruits about 90 percent, and in grapes about 80 percent.

Figure 31. Russia's imports of fruits in 2000, 2005, 2009 and 2010 (thousand tonnes)



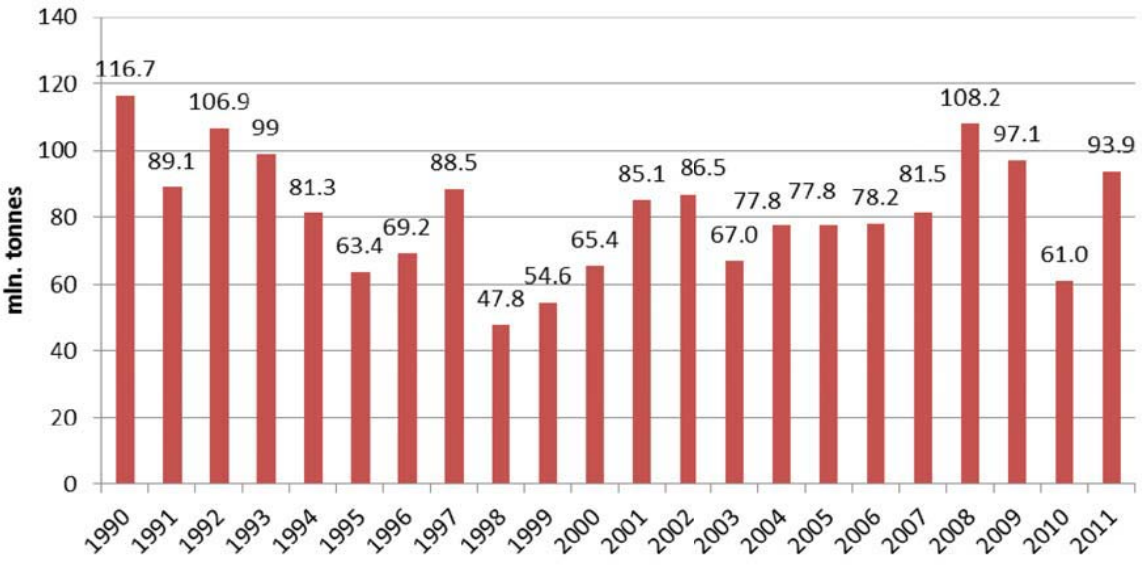
Source: Calculations based on RF Federal Customs Service data

Ecuador is the main supplier of bananas. It accounts for more than 90 percent of Russia's imports of bananas from developing countries. Russia obtains a significant share of its citrus imports from Turkey (30.5 percent of imports from developing countries in 2010), Morocco (17.8 percent), South Africa (14.2 percent) and Egypt (11.7 percent). The main suppliers of grapes are Turkey (59.0 percent of imports from developing countries in 2010), Chile (17.1 percent) and Iran (10.2 percent).

2.2.3 Russia's agricultural exports to developing countries

Sown area, grain yields and gross output were declining from the early 1990s until the financial crisis of 1998. Subsequent economic growth contributed to an increase in the gross output of grains. Since the beginning of 2000, Russia has transformed itself from being a net importer to a net exporter of grains. In 2008, Russia had the highest harvest since 1991 (see figure 32).

Figure 32. Gross grain harvests in Russia (million tonnes)



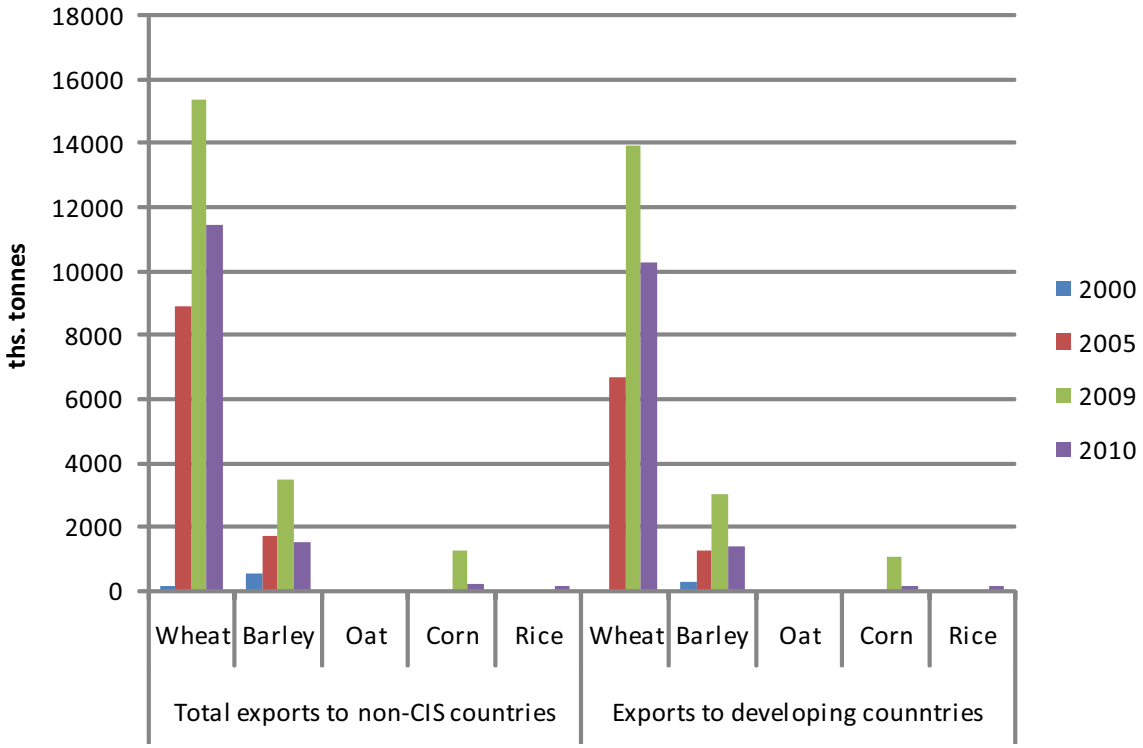
Source: RF Federal State Statistics Service data

The development of the grain market focuses on providing feed for the increasing livestock production, as well as further strengthening the export potential of Russia's agricultural sector in the face of rising global demand for food. Record volumes of grains were exported in 2009, amounting to 21.8 million tonnes. Wheat and barley are Russia's main export crops, although exports of corn and rice are increasing.

Exports of grains were significantly below potential export volumes both in 2008 and 2010, due to Russia's use of export restrictions. This policy affected developing countries negatively by raising agricultural prices and increasing the grain deficit in the world market[8].

The major importers of Russian wheat are Egypt (47.1 percent of Russia's wheat exports to developing countries in 2010) and Turkey (14.1 percent). Large supplies of barley are delivered to Saudi Arabia (38.2 percent), Libya (15.5 percent) and Iran (6.4 percent). Large volumes of rice were exported to Turkey in 2010 (155,000 tonnes or 96.1 percent of Russia's rice exports to developing countries). The geographical proximity of these countries to Russia contributes to a competitive advantage for Russian exporters, who benefit from the relatively low transportation costs.

Figure 33. Russia's grain exports in 2000, 2005, 2009 and 2010 (thousand tonnes)



Source: Calculations based on RF Federal Customs Service data

3. MAJOR PARAMETERS OF RUSSIA'S COMMITMENTS IN AGRICULTURE

The commitments in agriculture of countries that accede to the WTO fall under three 'pillars': domestic support, market access and export subsidies.

Russia's agricultural domestic support commitments differ from the ordinary standards in two major ways. One relates to Russia's implementation of the State program for agriculture development and regulation of the markets for agricultural products, raw materials and food for the period until 2020 ("State Program"). This is accommodated by a ceiling commitment level (Total Aggregate Measurement of Support or total AMS) in 2012 and 2013 that exceeds the average level of support in three recent years before accession, followed by a transition period during which the commitment level declines to that three-year average (see table 4).

Table 4. Russia's domestic support (Total AMS) commitments

Years	2012	2013	2014	2015	2016	2017	2018 and beyond
USD billion	9.0	9.0	8.1	7.2	6.3	5.4	4.4

Source: Schedule of the Russian Federation (Part IV - Agricultural products: commitments limiting subsidization).

The commitment level of USD 9 billion in the first two years corresponds to the average annual support provided to agriculture in 1993-1995 and also to the potential level of support to be provided in 2012 and 2013 under the "State Program" Subsequently, the commitment level declines by equal annual amounts to the fixed (bound) level of USD 4.4 billion in 2018. This commitment level corresponds to Russia's annual average total AMS in 2006-2008 (see table 5). This level is less than the level of support, measured as total AMS, that was provided in 2010 and 2011.

The second particularity in Russia's domestic support commitments is that during a transition period the relationship between product-specific AMS and non-product-specific AMS must stay within a certain agreed range. In any year, from the date of Russia's WTO accession through 31 December 2017, the sum of all product-specific aggregate measurements of support must not exceed 30 percent of the non-product-specific aggregate measurement of support. This is designed to meet the interests of some WTO Members by ruling out a massive shift from non-product-specific AMS support to product-specific AMS support in the early years of Russia's membership.

Table 5. Domestic support for agriculture in Russia, 2006-2008 (USD billion)

	2006	2007	2008	2006-2008 avg
Annex 2 of the Agreement on Agriculture ("green box")	1.8	2.0	2.4	2.1
Total AMS support	3.8	3.9	5.7	4.4

Source: JOB/ACC/5

An important part of Russia's commitments relate to market access for agricultural goods and food. In general, the average bound tariff rate for agricultural goods and food should be 10.8 percent. This is 20 percent less than the 2010 protection level of 13.5 percent (see table 6).

Table 6. Simple average tariffs for agricultural and food commodities: applied and bound rates (%)

	Applied rates					Final bound rates
	2000	2007	2008	2009	2010	
Russia*	9.9	14.6	14.2	13.2	13.5	10.8
Ukraine	-	23.0	13.0	9.7	9.8	11.0
Argentina	15.0	10.2	10.3	10.3	10.3	32.4
Brazil	15.6	10.3	10.2	10.2	13.7	35.4
China*	15.9	15.8	15.6	15.6	15.6	15.7
India	47.4	34.4	32.2	31.8	31.8	113.1
South Africa	5.8	9.2	9.3	8.9	9.0	39.5

Source: WTO Tariff Profiles.

Notes: Final bound rates refer to Uruguay Round commitments for Argentina, Brazil, India and South Africa, and to accession commitments for Russia, Ukraine and China.

**Russia and China refer to 2001 instead of 2000*

The average final bound tariff for Russia's agricultural and food commodities is very close to Ukraine's level and much less than those of the major developing countries. India has the highest final bound rate (113.1 percent), followed by South Africa (39.5 percent), Brazil (35.4 percent) and Argentina (32.4 percent). China has the lowest final bound rate (15.7 percent), although the applied rate in 2010 (15.6 percent) was very close to the bound rate, and was the second highest after India's (31.8 percent).

South Africa (9.0 percent) and Argentina (10.3 percent) have the lowest applied tariff rates for agricultural goods among the developing countries in this comparison. The average final bound tariff rates of Ukraine and Russia on agricultural goods are almost the same, and they are both very close to the relatively low 2010 average applied rates of South Africa and Argentina.

For individual agricultural goods, Russia agreed to cut tariffs to varying extents. Tariffs will be reduced the most on cereals (by 30.5 percent) and sugar and confectionery (by 28.5 percent). The smallest tariff cuts will apply to coffee and tea (3.3 percent). Moderate tariff reductions will be applied for dairy products (10.2 percent) and oilseeds, fats and oil (10.6 percent).

Tariff cuts will affect various products differently. Sugar is the most sensitive to tariff reductions among the products mentioned here. During the negotiations on Russia's accession to the WTO, it was agreed to cut the upper rate of the floating duty on raw sugar from USD 270 to 250 USD per tonne, if the average monthly price of raw sugar at the NYMEX is below USD 100 per tonne. The minimum rate of the floating duty was left unchanged relative to the current duty rate (USD 140 per tonne). That rate is applied if the average monthly price of raw sugar at the NYMEX exceeds USD 198.4 per tonne.

Table 7. Simple average MFN applied tariffs for different groups of agricultural goods and final bound rates, Russian Federation (%)

	2001	2005	2010	Final Bound Rate	Tariff reduction percentage
Dairy products	14.9	16.2	16.6	14.9	10.2
Cereals	-	-	13.1	9.1	30.5
Cereals and preparations	9.7	13.1	14.2	10.5	26.1
Oilseeds, fats and oil	7.2	9.4	8.5	7.6	10.6
Coffee and tea	11.1	11.5	9.2	8.9	3.3
Sugar and confectionery	5.0	21.9	16.5	11.8	28.5

Source: Calculations based on tariff profiles and custom tariff of the Russian Federation, Schedule of the Russian Federation (Section I-A).

In addition to changing the price scale for determining the rate of duty on raw sugar, Russia's WTO commitments change the use of a single price scale throughout the calendar year. Both the main price scale (USD 286.60 – 396.83 per tonne, applied from 1 January to 30 April and from 1 August to 31 December) and the seasonal price scale (USD 286.60 – 485.82 per tonne, applied from 1 May to 31 July) will shift to the scale of USD 100 – 198.4 per tonne. Assuming a continuation of the relatively high world sugar price of the last couple of years, it would be reasonable to see the minimum rate of duty on raw sugar being applied upon Russia's accession to the WTO.

Some WTO Members considered that Russia's system of sugar trade regulation does not comply with the rules of the WTO and have reserved a right to pursue this issue through the Dispute Settlement Mechanism. In the Report of the Working Party the Russian Federation also expressed its intention to consider reforming the sugar tariff regime in 2012, with a view to its further liberalisation.

The relatively low pre-accession level of tariff protection for coffee and tea (5-10 percent) means that these goods see the smallest tariff reduction over the 2013-2016 period. These products are not produced in Russia (except for the production of a small volume of tea in Krasnodar region) and Russia needs to import them as raw materials for the processing industry. The volumes of processed coffee and tea imported for final consumption are quite low.

Since meat production is the most sensitive to imports, TRQs are applied for beef, pork and poultry meat. TRQs will also be applied to regulate imports of whey products.

Apart from the TRQ for beef, Russia will amend the trade regime for what is called high quality beef. Russia committed to use quality based definitions as used in the US, Canada and Argentina. At the same time, upon accession the base price threshold for high quality beef of €8,000 per tonne will be subject to review according to a mechanism described in the notes of Russia's Schedule (Section I - A Tariffs).

Russia will apply the very liberal in-quota tariff rate of zero percent for pork. It was also agreed that the TRQ for fresh, chilled or frozen pork and for pork trimmings will be eliminated on 1 January 2020. Moreover, the tariff for live swine will be reduced from 40 to 5 percent. Once TRQs have been eliminated, flat *ad valorem* tariffs will apply for meats: 27.5 percent for beef, 25.0 percent for pork, and 37.5 percent for poultry meat.

Table 8. Tariff rate quotas in Russia's market access commitments

Products	In-quota rate (%)	Out of quota rate (%)	Volume of TRQ (tonnes)
Beef (0201)	15	55	40000
Beef (0202)	15	55	530000
Pork (except 0203 29 550 2,0203 29 900 2)	0	65	400000
Pork trimming (0203 29 550 2,0203 29 900 2)	0	65	30000
Poultry Meat (0207 14 200,0207 600)	25	80	250000
Poultry Meat (0207 14 100)	25	80	100000
Poultry Meat (0207 27)	25	80	14000
Whey (0404 10 120,0404 10 160)	10	15	15000

Source: Schedule of the Russian Federation (Section I-A).

Some of the TRQs are allocated to specific countries. This is the case for fresh and chilled beef (the EU and other WTO Members), frozen beef (the EU, the US, Costa Rica and other WTO Members), and boneless poultry meat (the EU and other WTO Members). In case the quota for a particular product is not filled, the mechanism for re-allocating the remaining volume of the quota among other trading partners has been spelled out.

Market access for some other agricultural and food products will become considerably more liberal. For instance, the import duty on wines will be reduced from 20 to 12.5 percent within 45 years. The import duty on cut flowers will be lowered from 15 to 5 percent. Final bound rates for apples, pears and other fresh fruit will go to half, or even less, of their current levels.

The application of the Generalized System of Preferences (GSP) of the Customs Union (CU), or CU GSP, scheme is fixed in the commitments of the Russian Federation. Under the CU GSP scheme, the import duties on products eligible for tariff preferences and originating in developing countries are 75 percent of the MFN duty rates. On such products from least-developed countries the duties are zero percent. Developing (103 countries) and least developed (49 countries) beneficiaries of the CU GSP scheme are listed in the Report of the Working Party (its tables 16 and 17). The Report also lists the goods originating in and imported from developing and least-developed countries that are subject to the CU GSP scheme (table 18 of the Report).

The Russian Federation committed to binding export subsidies at zero. Export duties for particular agricultural and food products were cut and fixed. For example, the export duty was reduced from 20 percent to zero on soybeans for sowing and other purposes, from 20 percent to 6.5 percent for sunflower seeds and rape or colza seeds for sowing and other purposes, from 10 percent to zero for mustard seeds, and from 6.5 percent to zero for spirits.

A substantial part of the negotiations was devoted to Russia's SPS regime, apart from market access, domestic support and export subsidies in agriculture. Russia and the Members of the Working Party on Russia's accession considered the system of state registration certificates, veterinary certificates, import permits and declarations of conformity.

As a result of these deliberations the Russian Federation made the commitment that, from the date of accession, all SPS measures will be developed in accordance with the WTO Agreements including the SPS Agreement:

> *"In particular, SPS measures would be applied only to the extent necessary to protect human, animal, or plant life or health; would be based on scientific principles and, where they exist, on international standards, guidelines, and recommendations; and, would not be more trade restrictive than required to achieve the appropriate level of protection applied in the Russian Federation. SPS measures would not arbitrarily or unjustifiably discriminate between Members*

where identical or similar conditions prevail, including between the territory of the Russian Federation and that of other Members. SPS measures would not be applied in a manner which would constitute a disguised restriction on international trade, and would not be maintained without sufficient scientific evidence, except as provided for in Article 5.7 of the WTO SPS Agreement[9]".

These commitments will facilitate exporters' access to Russia's market.

4. INFLUENCE OF RUSSIA'S ACCESSION TO THE WTO ON BELARUS, KAZAKHSTAN, AND DEVELOPING COUNTRIES

Russia's accession to the WTO and fulfillment of multilateral commitments in domestic support, market access, sanitary and phytosanitary measures, and technical regulation will stimulate increased transparency in foreign trade regulation, improve the access of imports to Russia's market, and restrict Russia's possibilities for supporting its agricultural producers and imposing unjustified measures that impede trade. The countries that export agricultural and food commodities to Russia will see the following benefits:

- reduction of Russia's custom duties;
- trade facilitation
- predictability of Russia's regulation of foreign trade;
- unification and transparency of Russia's non-tariff measures of trade regulation.

Against the background of consumer demand growth, these benefits will lead to an increase in Russia's agricultural and food imports. It is quite probable that, in response to consumer demand, the increase in imports of agricultural and food commodities will exceed the increase in domestic production. This might be the case for animal products in particular.

The average level of customs tariff protection of agricultural and food commodities in Russia was not high before WTO accession (see table 6). Therefore the improved access to Russia's market will not lead to large benefits for exporting countries. Nevertheless, for several commodity groups the concessions made by Russia will substantially improve trade for developing countries. The improved market access applies to commodities that Russia imports in large quantities (see table 9): raw sugar, meat of bovine animals and swine, fruits, tea, coffee and other products. Moreover, many agricultural and food commodities are recorded in the Report of the Working Party on Russia's accession to the WTO as falling within the CU GSP. This applies to meat and edible meat offal; dairy products; live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage; edible fruit and nuts; peel of citrus fruit or melons; coffee; tea; mate and spices; and rice and others. The consequence is that the import duties on such products originating in developing countries are 25 percent less than the MFN duty applied to imports originating in developed countries.

Among the developing countries, Brazil is the main supplier of pork and raw sugar to Russia. If Brazil maintains its competitiveness relative to other suppliers, its exports of these goods would benefit in the intermediate term from improved access to Russia's market.

Brazil, Uruguay, Paraguay and Argentina are the main beef exporters to Russia. With a limit on trade-distorting support, and without the ability to raise customs duties above bound levels, Russia will depend on beef imports for a long period to come. Accession to the WTO will therefore not allow Russia to implement its policy of substituting relatively low cost beef imports with domestic beef production. This will have a positive influence on beef exporters and on Russia's consumers.

Table 9. Values of Russia's imports of agricultural and food commodities from developing countries in 2010 (million USD)

Agricultural and food commodities	Countries	Import values
Meat of bovine animals	Brazil, Uruguay, Paraguay, Argentina	1561.4
Meat of swine	Brazil	714.5
Poultry Meat	Brazil	258.3
Cut flowers (0603)	Colombia, Kenya	102.5
Nuts (0801,0802)	Vietnam, Turkey, Indonesia, Brazil, Philippines, Côte d'Ivoire, India	92.9
Grapes (0806)	Turkey, Chile, Iran, South Africa, Afghanistan, Argentina	430.5
Apples, pears and quinces (0808)	China, Argentina, Chile, South Africa	230.4
Coffee (0901)	Brazil, Indonesia, Ethiopia, Peru, Colombia, Tanzania	134.6
Tea (0902)	Sri-Lanka, India, China, Indonesia, Kenya, Vietnam	517.2
Rice (1006)	Vietnam, Thailand, Pakistan, China	100.2
Raw Sugar (1701)	Brazil, Argentina, Cuba, Guatemala, Thailand	1132.0

Source: Calculations based on RF Federal Customs Service data

Chile, South Africa and Argentina will benefit from the significant reduction in Russia's import duties on wine. However, these countries will continue to face competition from developed countries in the market.

Despite being the main exporters of bananas, citrus, coffee and tea, developing countries will not receive significant benefits from the reduction of customs duties on these products, as the current levels of duties on them are not high. However, a substantial reduction of duties on grapes (from ten to five percent) will bring benefits for Turkey and Chile.

Russia's accession to the WTO and its commitments in domestic support, market access and export competition do not directly affect trade with Belarus and Kazakhstan. The rules of trade between Russia and these two countries are determined by the treaties and agreements of the Customs Union. Russia also has free trade agreements with all other CIS countries (Ukraine, Armenia, Kyrgyzstan, Moldova and Tajikistan) besides Azerbaijan, Turkmenistan and Uzbekistan, governing many aspects of its trade with these countries.

Liberalization of Russia's trade with non-CIS countries, as a result of the WTO accession, will contribute to replacing certain agricultural and food suppliers in CIS countries with exporters in non-CIS countries. Commodities from non-CIS countries, including those from developing countries, may become more competitive in the Customs Union market.

A comparison of the Customs Tariff of the Customs Union of Belarus, Kazakhstan and Russia with Russia's commitments under its WTO accession demonstrates that substantial trade liberalisation will take place in Russia. For example, Russia's bound WTO tariffs on a large number of products are significantly lower than the current applied rates of the Customs Union. This is the case for pork, milk and cream, cut flowers, grapes, apples and pears, apricots, peaches, cherries, plums, roasted coffee, tea, rice, starch, soy beans, olive oil, sausages, raw sugar, caramel, nuts, tropical fruit products, beer, wine, modified starches and fatty acids.

In general, Russia's removal of restrictions (both tariffs and non-tariff measures) on access to its agricultural and food market when implementing

its WTO commitments will inevitably lead to the reduction of the customs duties of the Customs Union. As a result, non-CIS countries (including developing countries) will see improvements not only in access to Russia's market but also in access to the Belarus and Kazakhstan markets.

Furthermore, in terms of export duties the difference between Russia's commitments in the WTO and the Customs Tariff of the Customs Union implies a need to bring them in line with each other when completing the formal accession process or shortly thereafter. In addition, given that Kazakhstan is a Member of the Customs Union and is at an advanced stage of the WTO accession, it must unify its commitments with those of Russia. This applies to approximately 30 percent of Kazakhstan's customs duties.

Developing countries can also foresee benefits from Belarus and Kazakhstan acceding to the WTO, if the commitments of Belarus and Kazakhstan, as Members, would be extended to the Customs Union of Belarus, Kazakhstan and Russia. As a result, in negotiating the accessions of Belarus and Kazakhstan to the WTO, developing countries can improve their access to Russia's market. That is an opportunity for developing countries to receive further benefits in Russia's agricultural and food market. However, it would be more logical if Russia's market access commitments would serve as the basis for the commitments that Kazakhstan and Belarus make as part of their own WTO accession negotiations.

Russia's accession to the WTO also affects agriculture in Belarus and Kazakhstan because of the bound limit on non-exempt domestic support for agriculture. Reducing Russia's trade-distorting domestic support and restricting its use will increase the competitiveness of imports of agricultural and food products both from CIS and non-CIS countries. However, many of the CIS countries are already members of the WTO, and their non-exempt domestic support for agriculture is restricted.

In acceding to the WTO Russia committed to applying any quantitative export restrictions in accordance with Article XI of the GATT 1994 and Article 12 of the WTO Agreement on Agriculture. This means that export prohibitions or restrictions can be temporarily applied only to prevent or relieve critical shortages of foodstuffs in Russia's domestic market. Russia must also beforehand notify the WTO Committee on Agriculture of the nature and duration of the measures taken and consider the interests of other members of the WTO. These commitments will help developing countries react more effectively to possible prohibitions or restrictions on Russia's grain exports.

Thus, Russia's membership in the WTO will provide significant trade benefits for developing countries. In the case of violation of Russia's obligations, they can use the WTO dispute settlement system to seek redress, an avenue that was not open before Russia acceded to the WTO.

ENDNOTES

1 The National Priority Project on "Development of the Agro-Industrial Complex" encompasses overall three major directions: the 'Accelerated development of cattle-breeding', the 'Encouragement of the development of smaller institutional forms of economic operations in the agricultural production sector', and the 'Provision with decent housing for young specialists (or, for their families) in the rural areas'.

2 The State program for agriculture development and regulation of the markets of agricultural products, raw materials and food for the period 2008-2012 was developed in conformity with the Federal Law "On Agriculture Development". The Program defines the objectives, goals and the basic directions for development of agriculture and regulation of agricultural and food markets, necessary funding, measures for implementation and indicators of their outcomes.

3 Here and below to calculate amounts in USD the following annual average exchange rates have been used: for 2000 – 28.13 Rub/USD, 2001 – 29.17 Rub/USD, 2002 – 31.35 Rub/USD, 2003 – 30.68 Rub/USD, 2004 – 28.81 Rub/USD, 2005 – 28.28 Rub/USD, 2006 – 27.19 Rub/USD, 2007 – 25.58 Rub/USD, 2008 – 24.81 Rub/USD, 2009 – 31.68 Rub/USD, 2010 – 30.36 Rub/USD. These rates were provided by the Bank of Russia.

4 The following programs of support are co-financed by the federal and regional budgets: support for livestock breeding, sheep, reindeer, horse breeding, improved seed production, seed delivery in northern and mountainous areas of the country, the production of flax and hemp, care for perennial plants, the compensation of the cost of acquisition of application of chemicals and crop insurance, reimbursement of the cost of interest on loans obtained in the Russian credit institutions and loans received in agricultural credit consumer cooperatives, the compensation of damage to agricultural producers due to abnormal meteorological conditions, subsidies on diesel fuel.

5 Here and below the value of production results from the volumes of agricultural production multiplied by the corresponding producer prices.

6 Forecast balances for the deliveries of food products between Russia and Belarus are made regularly since 1997. Since 2008, they have been formed for five year periods for milk, meat and sugar.

7 From 1 January 2010, the decision of RF Federal service on customers' rights protection and human well-being surveillance (Rospotrebnadzor) prohibited the use of solutions containing chlorine above the requirements set for drinking water (0.3-0.5 mg/l) in poultry processing. As a result of this decision, poultry imports from the US stopped completely until September 2010.

Furthermore, Rospotrebnadzor has prohibited the use of frozen poultry meat for the production of baby food, food for pregnant women and dietary products since 1 January 2010. Also since 1 January 2011, in the Russian Federation the use of frozen poultry meat is forbidden for the production of cooled natural semi-finished poultry products and foodstuff containing poultry meat without thermal processing of such products.

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9 Report of the Working Party on the accession of the Russian Federation to the World Trade Organisation, WT/ACC/RUS/70, WT/MIN(11)/2, p.273

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ANNEX 1. GENERAL CHARACTERISTICS OF RUSSIA'S AGRICULTURE, TRADE AND MAIN MARKETS OF AGRICULTURAL AND FOOD COMMODITIES

Table 1.1 Investments in fixed assets in agriculture and food production industry and their shares in total investments in fixed assets in 2000-2009

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Agriculture, hunting and forestry (USD billion)	1.2	2.1	2.6	3.0	4.0	5.0	8.2	13.2	16.1	10.0
Food production, including beverages and tobacco (USD billion)	1.6	1.7	2.1	2.7	3.2	4.0	4.7	6.6	7.8	5.0
Share of agriculture, hunting and forestry in total investments in fixed assets, %	3.0	4.0	4.6	4.1	4.1	3.9	4.8	5.0	4.6	4.0
Share of food production in investments in fixed assets, %	3.8	3.4	3.8	3.8	3.3	3.1	2.7	2.5	2.2	2.0

Source: RF Federal State Statistics Service data

Table 1.2 Values of production of main agricultural commodities and their shares in gross agricultural production in 2008-2010

	Values of production, USD million				The shares of values of production of agricultural commodities in gross agricultural production, %			
	2008	2009	2010	2008-2010 avg	2008	2009	2010	2008-2010 avg
Grains (weight after processing)	19700	13045	9788	14177	19.9	16.4	12.2	16.4
Oilseeds	3201	2443	3138	2927	3.2	3.1	3.9	3.4
Sugar beet	1456	1160	1616	1411	1.5	1.5	2.0	1.6
Beef	6537	5858	6160	6185	6.6	7.4	7.6	7.2
Pork	7274	7785	8497	7852	7.3	9.8	10.6	9.1
Poultry	6057	6327	7166	6517	6.1	8.0	8.9	7.5
Milk	14818	11541	14093	13484	14.9	14.5	17.5	15.6
Eggs	3662	3420	3646	3576	3.7	4.3	4.5	4.1
Other agricultural products	36503	27838	26423	30255	36.8	35.1	32.8	35.0
Gross agricultural production	99208	79417	80527	86384	100.0	100.0	100.0	100.0

Source: Calculations based on RF Federal State Statistics Service and Bank of Russia data

Table 1.3 Production of main agricultural commodities in 2008-2010

	Volumes of production, thousand tonnes				The volumes of production in % to previous year		
	2008	2009	2010	2008-2010 avg	2009	2010	2010 to 2008
Grains (weight after processing)	108179.0	97111.0	60885.3	88725.1	89.8	62.7	56.3
Oilseeds	8791.7	8000.6	7140.9	7977.8	91.0	89.3	81.2
Sugar beet	28995.3	24892.0	22238.0	25375.1	85.8	89.3	76.7
Beef	1768.7	1740.6	1721.5	1743.6	98.4	98.9	97.3
Pork	2042.1	2169.5	2321.4	2177.7	106.2	107.0	113.7
Poultry	2216.7	2555.1	2836.2	2536.0	115.3	111.0	127.9
Milk	32362.6	32570.0	32000.0	32310.9	100.6	98.2	98.9
Eggs	2114.3	2190.5	2261.1	2114.3	103.6	103.2	106.9

Source: Calculations based on RF Federal State Statistics Service data

Table 1.4 Market volumes of main agricultural and food commodities in 2008-2010 (thousand tonnes)

	Marketed output volumes for domestic consumption				Export volumes			
	2008	2009	2010	2008-2010 avg	2008	2009	2010	2008-2010 avg
Grains (weight after processing)	43097.5	35550.5	35511.6	38053.2	13593.9	27778.5	13859.6	18410.7
Sugar beet	24628.4	20903.8	19089.3	21540.5				
Milk	19054.6	19144.1	19094.9	19097.8	49.0	51.4	28.8	43.1
Sugar	5818.8	4889.1	4728.0	5145.3	53.8	133.7	26.6	71.4
Oilseeds	5266.7	6168.5	5860.4	5765.2	146.8	334.5	180.1	220.5
Poultry	2684.9	3126.8	3529.6	3113.7	2.8	6	18.5	9.1
Beef	2296.7	2331.3	2281.5	2303.2	0.1	0.3	0.1	0.2
Vegetable oil	1952.07	2547.03	2652.97	2384.0	532.5	724.3	417.5	558.1
Pork	1823.9	2075.2	2304.9	2068.0	0.1	0.2	0.2	0.2
Eggs	1561.8	1602.6	1669.6	1611.3				

	Import Volumes				Market Volumes			
	2008	2009	2010	2008-2010 avg	2008	2009	2010	2008-2010 avg
Grains (weight after processing)	959.0	431.3	443.7	611.3	57650.4	63760.3	49814.9	57075.2
Sugar beet					24628.4	20903.8	19089.3	21540.5
Milk	238.9	252.4	426.5	305.9	19342.5	19447.9	19550.2	19446.8
Sugar	2585.0	1512.2	2374.3	2157.2	8457.6	6535.0	7128.9	7373.8
Oilseeds	692.9	1071.5	1212.9	992.4	6106.4	7574.5	7253.4	6978.1
Poultry	1224	985.9	688.1	966.0	3911.7	4118.7	4236.2	4088.8
Beef	872	761	752	795.0	3168.8	3092.6	3033.6	3098.3
Vegetable oil	111.9	43.4	114.7	90.0	2596.5	3314.7	3185.2	3032.1
Pork	822	667	681	723.3	2646.0	2742.4	2986.1	2791.5
Eggs					1561.8	1602.6	1669.6	1611.3

Source: Calculations based on RF Federal State Statistics Service data

Table 1.5 Supply and utilization of meat and meat products in Russia in 2005-2009 (thousand tonnes)

	2005	2006	2007	2008	2009	2010
Supply						
Initial stocks	592	650	676	733	744	804
Production (livestock and poultry for slaughter in slaughter weight)	4 972	5 259	5 790	6 268	6 720	7 167
Import	3 094	3 175	3 177	3 248	2 919	2 855
Total	8 658	9 084	9 643	10 249	10 383	10 826
Utilization						
Industrial consumption	54	52	55	45	41	37
Waste	16	13	16	17	18	19
Export	67	57	65	90	65	97
Household consumption	7 871	8 287	8 774	9 353	9 455	9 871
Ending stocks	650	675	733	744	804	802
The share of import in supply, %	35,7	35,0	32,9	31,7	28,1	26,4
The share of production in supply, %	57,4	57,9	60,0	61,2	64,7	66,2

Source: RF Federal State Statistics Service data

Table 1.6 Russia's meat and poultry import in 2006-2010 (thousand tonnes)

	2006	2007	2008	2009	2010
Meat fresh and frozen (without poultry)	1411.4	1489.5	1710.9	1437.8	1441.6
Poultry fresh and frozen	1282.5	1294.9	1224.0	985.9	688.0

Source: RF Federal State Statistics Service data

Table 1.7 Sugar supply and utilization in Russia in 2007/2008 – 2009/2010 (thousand tonnes)

	Marketing years		
	2007/2008	**2008/2009**	**2009/2010**
Supply			
Initial stocks	440	550	481
Sugar production from sugar beet	3200	3481	3313
Raw sugar import	2800	1850	2100
White sugar import	300	300	280
Total supply	**6740**	**6181**	**6174**
Utilization			
Export	200	200	100
Consumption	5990	5500	5694
Ending stocks	550	481	380
Total utilization	**6740**	**6181**	**6174**

Source: USDA data

Table 1.8 The structure of Russia's trade with developed, developing and CIS countries (%)

	Export				Import			
	2000	**2005**	**2009**	**2010**	**2000**	**2005**	**2009**	**2010**
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
including								
Developed countries	68.0	66.4	62.5	63.5	52.6	55.9	58.7	54.8
Developing countries	18.6	19.5	22.0	21.5	13.1	23.6	28.3	31.4
CIS countries	13.4	14.1	15.5	15.0	34.3	20.5	13.0	13.8
including								
Belarus	5.4	4.4	5.5	4.6	11.0	6.2	4.0	4.3
Kazakhstan	2.2	2.8	3.0	2.7	6.5	3.5	2.2	2.0

Source: Calculations based on RF Federal Customs Service data

Table 1.9 Russia's agricultural and food trade with developed, developing and CIS countries in 2010 (million USD and %)

	mln. USD		%	
	Export	**Import**	**Export**	**Import**
Total	9365.7	36482.6	100.0	100.0
including				
Developed countries	2327.2	18945.4	24.9	51.9
Developing countries	3657.1	11352.7	39.0	31.1
CIS countries	3381.4	6184.5	36.1	17.0
including				
Belarus	678.0	2688.4	7.2	7.4
Kazakhstan	1124.3	126.7	12.0	0.3

Source: Calculations based on RF Federal Customs Service data

ANNEX 2. RUSSIA'S AGRICULTURAL AND FOOD TRADE WITH DEVELOPING AND CIS COUNTRIES IN 2010

Table 2.1 Russia's imports of agricultural and food commodities from developing and CIS countries in 2010

Commodity code	Description of commodity group	mln. USD				
		Total imports	Imports from developing countries	Imports from CIS	Imports from Belarus	Imports from Kazakhstan
01	Live animals	333.3	0.4	18.6	13.5	0.2
02	Meat and edible meat offal	6512.1	2228.2	719.5	663.7	0.1
03	Fish and crustaceans, molluscs and other aquatic invertebrates	2039.9	375.9	31.5	12.9	12.1
04	Dairy products; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	3493.0	54.5	1825.3	1417.9	2.1
05	Products of animal origin, not elsewhere specified or included	136.6	58.0	3.1	1.8	0.0
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	759.0	287.9	4.5	1.1	0.1
07	Edible vegetables and certain roots and tubers	2331.6	903.2	480.0	55.9	42.1
08	Edible fruit and nuts; peel of citrus fruit or melons	5504.2	2604.8	864.3	11.0	11.2
09	Coffee, tea, mate and spices	959.8	458.2	14.4	0.3	0.2
10	Cereals	248.2	76.4	38.3	0.7	30.5
11	Products of the milling industry; malt; starches; inulin; wheat gluten	146.5	6.4	59.4	31.6	5.7
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder	1005.6	365.5	56.6	1.6	1.1
13	Lac; gums, resins and other vegetable saps and extracts	135.4	40.1	0.7	0.3	0.0
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	2.8	1.2	0.2	0.0	0.0
15	Animal or vegetable fats and oils and their derived products; prepared edible fats; animal or vegetable waxes	1369.2	654.4	290.5	10.3	0.0
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	523.5	104.3	235.9	203.1	0.0

Table 2.1 *Continued*

Commodity code	Description of commodity group	%				
		Total imports	Imports from developing countries	Imports from CIS	Imports from Belarus	Imports from Kazakhstan
01	Live animals	100	0.1	5.6	4.1	0.1
02	Meat and edible meat offal	100	34.2	11.0	10.2	0.0
03	Fish and crustaceans, molluscs and other aquatic invertebrates	100	18.4	1.5	0.6	0.6
04	Dairy products; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	100	1.6	52.3	40.6	0.1
05	Products of animal origin, not elsewhere specified or included	100	42.4	2.2	1.3	0.0
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	100	37.9	0.6	0.1	0.0
07	Edible vegetables and certain roots and tubers	100	38.7	20.6	2.4	1.8
08	Edible fruit and nuts; peel of citrus fruit or melons	100	47.3	15.7	0.2	0.2
09	Coffee, tea, mate and spices	100	47.7	1.5	0.0	0.0
10	Cereals	100	30.8	15.4	0.3	12.3
11	Products of the milling industry; malt; starches; inulin; wheat gluten	100	4.4	40.5	21.6	3.9
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder	100	36.3	5.6	0.2	0.1
13	Lac; gums, resins and other vegetable saps and extracts	100	29.7	0.5	0.2	0.0
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	100	41.0	7.3	0.1	0.0
15	Animal or vegetable fats and oils and their derived products; prepared edible fats; animal or vegetable waxes	100	47.8	21.2	0.8	0.0
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	100	19.9	45.1	38.8	0.0

Table 2.1 *Continued*

Commodity code	Description of commodity group	mln. USD				
		Total imports	Imports from developing countries	Imports from CIS	Imports from Belarus	Imports from Kazakhstan
17	Sugars and sugar confectionery	1668.7	1176.3	265.3	152.8	10.1
18	Cocoa and cocoa preparations	1304.6	137.0	386.9	20.5	3.2
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	682.3	44.2	115.3	28.9	4.8
20	Preparations of vegetables, fruit, nuts or other parts of plants	1401.0	543.3	204.3	19.1	0.5
21	Miscellaneous edible preparations	1493.9	320.9	41.0	13.6	0.1
22	Beverages, spirits and vinegar	2264.2	87.1	495.9	24.2	0.8
23	Residues and waste from the food industries; prepared animal fodder	957.5	158.0	7.5	3.3	0.7
24	Tobacco and manufactured tobacco substitutes	1209.1	666.6	43.3	0.1	1.2

Table 2.1 *Continued*

Commodity code	Description of commodity group	%				
		Total imports	Imports from developing countries	Imports from CIS	Imports from Belarus	Imports from Kazakhstan
17	Sugars and sugar confectionery	100	70.5	15.9	9.2	0.6
18	Cocoa and cocoa preparations	100	10.5	29.7	1.6	0.2
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	100	6.5	16.9	4.2	0.7
20	Preparations of vegetables, fruit, nuts or other parts of plants	100	38.8	14.6	1.4	0.0
21	Miscellaneous edible preparations	100	21.5	2.7	0.9	0.0
22	Beverages, spirits and vinegar	100	3.8	21.9	1.1	0.0
23	Residues and waste from the food industries; prepared animal fodder	100	16.5	0.8	0.3	0.1
24	Tobacco and manufactured tobacco substitutes	100	55.1	3.6	0.0	0.1

Source: Calculations based on RF Federal Customs Service data

Table 2.2 Russia's exports of agricultural and food commodities from developing and CIS countries in 2010

Commodity code	Description of commodity group	mln. USD				
		Total exports	Exports to developing countries	Exports to CIS	Exports to Belarus	Exports to Kazakhstan
01	Live animals	11.1	2.3	7.9	2.6	3.7
02	Meat and edible meat offal	36.2	5.1	9.6	0.6	8.7
03	Fish and crustaceans, molluscs and other aquatic invertebrates	2209.4	1705.6	64.3	37.7	14.5
04	Dairy products; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	271.2	7.5	252.1	30.2	134.1
05	Products of animal origin, not elsewhere specified or included	23.2	10.1	1.6	1.3	0.0
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	1.8	0.4	1.0	0.0	0.6
07	Edible vegetables and certain roots and tubers	77.5	13.3	26.1	4.1	10.3
08	Edible fruit and nuts; peel of citrus fruit or melons	37.0	5.1	17.3	0.5	14.7
09	Coffee, tea, mate and spices	137.7	1.2	127.7	46.1	17.1
10	Cereals	2419.6	1467.6	132.9	9.4	14.2
11	Products of the milling industry; malt; starches; inulin; wheat gluten	119.7	15.8	67.2	24.3	10.9
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder	99.3	11.5	18.5	10.5	5.9
13	Lac; gums, resins and other vegetable saps and extracts	4.7	0.4	4.0	2.3	1.4
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	6.3	0.5	0.1	0.1	0.0
15	Animal or vegetable fats and oils and their derived products; prepared edible fats; animal or vegetable waxes	836.2	154.8	359.0	51.7	104.4
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	209.3	3.9	187.2	22.4	108.7
17	Sugars and sugar confectionery	146.7	15.5	111.4	11.3	37.8
18	Cocoa and cocoa preparations	390.5	19.0	319.1	44.2	89.7

Table 2.2 *Continued*

Commodity code	Description of commodity group	%				
		Total exports	Exports to developing countries	Exports to CIS	Exports to Belarus	Exports to Kazakhstan
01	Live animals	100.0	20.9	71.3	23.7	33.3
02	Meat and edible meat offal	100.0	14.1	26.6	1.7	23.9
03	Fish and crustaceans, molluscs and other aquatic invertebrates	100.0	77.2	2.9	1.7	0.7
04	Dairy products; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included	100.0	2.8	93.0	11.1	49.5
05	Products of animal origin, not elsewhere specified or included	100.0	43.7	6.8	5.5	0.2
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	100.0	24.3	55.7	0.4	32.0
07	Edible vegetables and certain roots and tubers	100.0	17.2	33.7	5.3	13.2
08	Edible fruit and nuts; peel of citrus fruit or melons	100.0	13.8	46.8	1.5	39.7
09	Coffee, tea, mate and spices	100.0	0.8	92.7	33.5	12.4
10	Cereals	100.0	60.7	5.5	0.4	0.6
11	Products of the milling industry; malt; starches; inulin; wheat gluten	100.0	13.2	56.1	20.3	9.1
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder	100.0	11.6	18.6	10.6	6.0
13	Lac; gums, resins and other vegetable saps and extracts	100.0	8.9	85.1	48.8	30.7
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	100.0	7.2	1.1	1.1	0.1
15	Animal or vegetable fats and oils and their derived products; prepared edible fats; animal or vegetable waxes	100.0	18.5	42.9	6.2	12.5
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	100.0	1.9	89.4	10.7	51.9
17	Sugars and sugar confectionery	100.0	10.6	75.9	7.7	25.8
18	Cocoa and cocoa preparations	100.0	4.9	81.7	11.3	23.0

Table 2.2 *Continued*

Commodity code	Description of commodity group	mln. USD				
		Total exports	Exports to developing countries	Exports to CIS	Exports to Belarus	Exports to Kazakhstan
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	414.1	12.5	362.4	92.0	134.6
20	Preparations of vegetables, fruit, nuts or other parts of plants	150.6	3.2	127.8	48.0	56.8
21	Miscellaneous edible preparations	478.5	19.6	391.0	90.3	148.0
22	Beverages, spirits and vinegar	460.1	20.7	289.0	78.2	94.6
23	Residues and waste from the food industries; prepared animal fodder	361.5	154.7	91.7	23.7	29.2
24	Tobacco and manufactured tobacco substitutes	463.3	6.8	412.2	46.7	84.4

Table 2.2 *Continued*

Commodity code	Description of commodity group	%				
		Total exports	Exports to developing countries	Exports to CIS	Exports to Belarus	Exports to Kazakhstan
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	100.0	3.0	87.5	22.2	32.5
20	Preparations of vegetables, fruit, nuts or other parts of plants	100.0	2.1	84.9	31.9	37.7
21	Miscellaneous edible preparations	100.0	4.1	81.7	18.9	30.9
22	Beverages, spirits and vinegar	100.0	4.5	62.8	17.0	20.6
23	Residues and waste from the food industries; prepared animal fodder	100.0	42.8	25.4	6.6	8.1
24	Tobacco and manufactured tobacco substitutes	100.0	1.5	89.0	10.1	18.2

Source: Calculations based on RF Federal Customs Service data

ANNEX 3. RUSSIA'S AGRICULTURAL AND FOOD IMPORTS FROM DEVELOPING COUNTRIES

Table 3.1 Russia's imports of meat of bovine animals

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina	4985	4670.6	190849	236745.2	140174	484486	33792	114995
Brazil			299930	376528.6	331247	1205742.5	283263	976680.8
Uruguay	1246	922	3383	4898.8	68366	234217.8	77247	257298.1
Paraguay			51801	66254.1	47732	165418.7	64518	212395.4
China	596	537.8					25	85.2
Mongolia	15322	13645.7	2634	2918.8	8246	17387.8	3594	7913.8
Mexico							2888	10594.4
Chile							47	154.4
Imports from deve-loping countries	22149	19776.1	548597	687345.5	595765	2107252.8	465374	1580117.1
Total imports from non-CIS members	140011	165024.7	639508	811633.5	632230	2254989	612360	2124909.5

Source: Calculations based on RF Federal Customs Service data

Table 3.2 Structure of Russia's imports of meat of bovine animals (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina	22.5	23.6	34.8	34.4	23.5	23.0	7.3	7.3
Brazil			54.7	54.8	55.6	57.2	60.9	61.8
Uruguay	5.6	4.7	0.6	0.7	11.5	11.1	16.6	16.3
Paraguay			9.4	9.6	8.0	7.8	13.9	13.4
China	2.7	2.7					0.0	0.0
Mongolia	69.2	69.0	0.5	0.4	1.4	0.8	0.8	0.5
Mexico							0.6	0.7
Chile							0.0	0.0
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	15.8	12.0	85.8	84.7	94.2	93.4	76.0	74.4

Source: Calculations based on RF Federal Customs Service data

Table 3.3 Russia's imports of meat of swine

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina							23,0	100,6
Brazil	14636.0	12696.6	397826.0	586953.5	257507.0	802541.8	225154.0	714470.8
Paraguay			828.0	1081.1	420.0	1493.5		
Uruguay			486.0	450.0	26.0	59.8		
Vietnam	1006.0	613.9	1136.0	1857.8				
China	1482.0	1634.4	1760.0	2424.1				
South Korea			6054.0	8604.0				
Chile					2098.0	6089.9	1624.0	4592.5
Imports from developing countries	17124.0	14944.9	408090.0	601370.5	260051.0	810185.0	226778.0	719063.3
Total imports from non-CIS members	198714.0	197933.4	556426.0	809086.1	649649.0	1915185.5	641584.0	1922882.7

Source: Calculations based on RF Federal Customs Service data

Table 3.4 Structure of Russia's imports of meat of swine (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina							0.0	0.0
Brazil	85.5	85.0	97.5	97.6	99.0	99.1	99.3	99.4
Paraguay			0.2	0.2	0.2	0.2		
Uruguay			0.1	0.1	0.0	0.0		
Vietnam	5.9	4.1	0.3	0.3				
China	8.7	10.9	0.4	0.4				
South Korea			1.5	1.4				
Chile					0.8	0.8	0.7	0.6
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	8.6	7.6	73.3	74.3	40.0	42.3	35.3	37.4

Source: Calculations based on RF Federal Customs Service data

Table 3.5 Russia's imports of poultry meat

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina			8798.0	7854.5	4841.0	6923.1	7025.0	10130.3
Brazil	15193.0	9427.3	244282.0	201373.2	70201.0	138655.9	142742.0	258330.4
Uruguay					192.0	209.5	241.0	235.4
Chile							781.0	939.3
Paraguay			448.0	445.3	356.0	538.8		
Turkey							41.0	62.7
China	1030.0	704.5						
Imports from developing countries	16223.0	10131.8	253528.0	209673.0	75590.0	146327.3	150830.0	269698.1
Total imports from non-CIS members	677288.0	362340.2	1318496.0	847763.6	965071.0	1089271.9	649812.0	862794.2

Source: Calculations based on RF Federal Customs Service data

Table 3.6 Structure of Russia's imports of poultry meat (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina			3.5	3.7	6.4	4.7	4.7	3.8
Brazil	93.7	93.0	96.4	96.0	92.9	94.8	94.6	95.8
Uruguay					0.3	0.1	0.2	0.1
Chile							0.5	0.3
Paraguay			0.2	0.2	0.5	0.4		
Turkey								
China	6.3	7.0						
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	2.4	2.8	19.2	24.7	7.8	13.4	23.2	31.3

Source: Calculations based on RF Federal Customs Service data

Table 3.7 Russia's imports of sugar

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina	61.0	13.1	10.0	2.5			61.1	42.0
Brazil	1828.2	279.8	2365.8	609.5	1004.8	376.5	1793.2	996.7
Cuba	2042.9	302.6	185.2	47.5	142.8	53.2	80.9	41.8
Peru							25.5	11.0
Thailand	279.3	42.5	45.9	12.1	30.0	20.9	30.4	19.3
Costa Rica	260.3	44.0	46.0	12.2	0.1	0.1	17.9	7.6
Guatemala	2.0	0.7	14.2	3.5			70.2	32.1
Colombia	260.3	44.0	57.8	14.2	10.7	7.2	10.7	6.9
Imports from developing countries	4734.0	726.9	2724.9	701.5	1188.3	457.9	2089.8	1157.6
Total imports from non-CIS countries	4816.7	764.3	2968.1	767.2	1312.4	539.5	2155.2	1209.8

Source: Calculations based on RF Federal Customs Service data

Table 3.8 Structure Russia's imports of sugar (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina	1.3	1.8	0.4	0.4			2.9	3.6
Brazil	38.6	38.5	86.8	86.9	84.6	82.2	85.8	86.1
Cuba	43.2	41.6	6.8	6.8	12.0	11.6	3.9	3.6
Peru							1.2	1.0
Thailand	5.9	5.8	1.7	1.7	2.5	4.6	1.5	1.7
Costa Rica	5.5	6.1	1.7	1.7			0.9	0.7
Guatemala	0.0	0.1	0.5	0.5			3.4	2.8
Colombia	5.5	6.1	2.1	2.0	0.9	1.6	0.5	0.6
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	98.3	95.1	91.8	91.4	90.5	84.9	97.0	95.7

Source: Calculations based on RF Federal Customs Service data

Table 3.9 Russia's imports of wines

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina	380010	549.0	26953510	17819.6	33901669	27972.2	6287551	10572.2
Brazil			177600	113.3	25119612	13353.9	9536170	5141.1
Uruguay			20330	61	842037	707.5	963531	838.8
Chile	288760	743.3	7703800	16020	15775337	33899.6	15151063	41389.4
South Africa	3051630	1123.5	1168240	2751.1	5800017	7497.6	8720782	11532.2
Imports from developing countries	3720400	2415.8	36023480	36765	81438672	83430.8	40659097	69473.7
Total imports from non-CIS countries	30871820	51088.7	253223940	292986.5	356803785	533407.8	432419737	700819.8

Source: Calculations based on RF Federal Customs Service data

Table 3.10 Structure of Russia's imports of wines (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina	10.2	22.7	74.8	48.5	41.6	33.5	15.5	15.2
Brazil			0.5	0.3	30.8	16.0	23.5	7.4
Uruguay			0.1	0.2	1.0	0.8	2.4	1.2
Chile	7.8	30.8	21.4	43.6	19.4	40.6	37.3	59.6
South Africa	82.0	46.5	3.2	7.5	7.1	9.0	21.4	16.6
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	12.1	4.7	14.2	12.5	22.8	15.6	9.4	9.9

Source: Calculations based on RF Federal Customs Service data

Table 3.11 Russia's imports of rice

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Thailand	10535	2917,4	58455	19093	73779	47847	50902	32824,3
Viet Nam	47228	6608,9	82687	17038,5	92418	42628,4	74542	34194,3
China	218227	36031,6	128237	29171,4	42549	17766,6	15921	7223,9
Pakistan	497	168,5	24137	6467,2	17958	9829,8	46838	25993,1
India	51436	14580,2	22214	6635,7			108	160,7
Egypt			8667	2759,9	596	544	600	473,3
Uruguay					13746	8492,8	8326	5363,7
Brazil					9338	5927,5	550	374,2
Cambodia							1512	793,5
Argentina	3130	863,2			420	345,2		
Imports from developing countries	331053	61169,8	324397	81165,7	250804	133381,3	199299	107401
Total imports from non-CIS countries	347566	68488,9	336530	85572,6	254942	139811,2	214484	121465,7

Source: Calculations based on RF Federal Customs Service data

Table 3.12 Structure of Russia's imports of rice (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Thailand	3.2	4.8	18.0	23.5	29.4	35.9	25.5	30.6
Viet Nam	14.3	10.8	25.5	21.0	36.8	32.0	37.4	31.8
China	65.9	58.9	39.5	35.9	17.0	13.3	8.0	6.7
Pakistan	0.2	0.3	7.4	8.0	7.2	7.4	23.5	24.2
India	15.5	23.8	6.8	8.2	0.0	0.0	0.1	0.1
Egypt			2.7	3.4	0.2	0.4	0.3	0.4
Uruguay					5.5	6.4	4.2	5.0
Brazil					3.7	4.4	0.3	0.3
Cambodia							0.8	0.7
Argentina	0.9	1.4			0.2	0.3		
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	95.2	89.3	96.4	94.9	98.4	95.4	92.9	88.4

Source: Calculations based on RF Federal Customs Service data

Table 3.13 Russia's imports of coffee

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Brazil	1326	1038.8	3752	6933.1	20969	52749.5	26294	88664.1
India	9177	113940.1	3815	3127.6	1252	3007	1738	4457.4
Indonesia	1803	2733.5	2916	3337.2	19057	31452.3	9486	19307.3
Mexico	45	78	44	100.1	448	1376.4	829	3070.2
Colombia	232	352.9	1653	3548.4	2687	9246.8	1194	5558.4
Kenya			91	122.9	188	735.9	327	1334.2
Cameroon	90	95.6	218	432.6	712	1884.2	1715	4455.8
Cuba					47	302.6	59	398.1
Nicaragua	98	103.8	772	1335.3	708	2253	646	2721.6
Peru			99	213.4	1111	4378.7	1650	7126.6
Tanzania	38	40.3	4964	3081.1	2547	6626.8	1585	5222.7
Uganda	270	434.2	1308	1477.5	2759	5205.9	2894	7060
Ethiopia	114	175.6	1260	2531.8	1884	5176.4	2591	8706.6
Imports from developing countries	13193	118992.8	20892	26241	54369	124395.5	51008	158083
Total imports from non-CIS countries	20274	30874.8	39256	70077.8	88808	244686.1	101784	330758.7

Source: Calculations based on RF Federal Customs Service data

Table 3.14 Structure of Russia's imports of coffee (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Brazil	10.1	0.9	18.0	26.4	38.6	42.4	51.5	56.1
India	69.6	95.8	18.3	11.9	2.3	2.4	3.4	2.8
Indonesia	13.7	2.3	14.0	12.7	35.1	25.3	18.6	12.2
Mexico	0.3	0.1	0.2	0.4	0.8	1.1	1.6	1.9
Colombia	1.8	0.3	7.9	13.5	4.9	7.4	2.3	3.5
Kenya			0.4	0.5	0.3	0.6	0.6	0.8
Cameroon	0.7	0.1	1.0	1.6	1.3	1.5	3.4	2.8
Cuba					0.1	0.2	0.1	0.3
Nicaragua	0.7	0.1	3.7	5.1	1.3	1.8	1.3	1.7
Peru			0.5	0.8	2.0	3.5	3.2	4.5
Tanzania	0.3	0.0	23.8	11.7	4.7	5.3	3.1	3.3
Uganda	2.0	0.4	6.3	5.6	5.1	4.2	5.7	4.5
Ethiopia	0.9	0.1	6.0	9.6	3.5	4.2	5.1	5.5
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	65.1	385.4	53.2	37.4	61.2	50.8	50.1	47.8

Source: Calculations based on RF Federal Customs Service data

Table 3.15 Russia's imports of tea

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
China	2896	3087.9	14938	16545.6	18609	36456.5	19654	48132.4
India	113468	164757.4	36176	49719.3	45788	113259.9	46011	124624
Indonesia	3824	4321	20351	24964.7	18462	36245.5	13454	30141.5
Sri Lanka	27654	39757.3	70668	149978.1	54257	215105.9	54404	239655.3
Kenya	96	162.7	13337	24398.2	15033	40595	14755	44871.4
Viet Nam	446	464.2	10193	9261.5	20099	27619.8	19218	29804.4
Argentina					85	142.8	161	250.9
Brazil					86	150.7		
Imports from developing countries	148384	212550.5	165663	274867.4	172419	469576.1	167657	517479.9
Total imports from non-CIS countries	153088	220169.7	176492	309404.8	179948	496155.4	177773	554757.8

Source: Calculations based on RF Federal Customs Service data

Table 3.16 Structure of Russia's imports of tea (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
China	2.0	1.5	9.0	6.0	10.8	7.8	11.7	9.3
India	76.5	77.5	21.8	18.1	26.6	24.1	27.4	24.1
Indonesia	2.6	2.0	12.3	9.1	10.7	7.7	8.0	5.8
Sri Lanka	18.6	18.7	42.7	54.6	31.5	45.8	32.4	46.3
Kenya	0.1	0.1	8.1	8.9	8.7	8.6	8.8	8.7
Viet Nam	0.3	0.2	6.2	3.4	11.7	5.9	11.5	5.8
Argentina					0.0	0.0	0.1	0.0
Brazil					0.0	0.0		
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	96.9	96.5	93.9	88.8	95.8	94.6	94.3	93.3

Source: Calculations based on RF Federal Customs Service data

Table 3.17 Russia's imports of bananas

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Brazil							166	110,1
Viet Nam	2507	400.9	982	358.1	262	347.4	384	533.2
China	754	375.5	2284	1380.7	4052	2564.4	2575	1719.5
Colombia	22771	7501.9	28005	14767.8	5212	3441.2	9500	6329.1
Costa Rica	4200	1455.9	15468	8221.8	32617	21443.2	48212	32907.9
Mexico					2559	1720.9	1140	738.3
Ecuador	442890	154321.7	791057	412088.8	911208	584342.9	976560	642092
Philippines	2921	1146.4	21190	11102.9	24515	16119	29831	19455.9
Panama	15738	5474.3	3948	2092.6	384	378.3		
Imports from developing countries	491781	170676.6	862934	450012.7	980809	630357.3	1068368	703886
Total imports from non-CIS countries	502925	175040.7	864876	451054.6	980896	630447.3	1068571	704129.2

Source: Calculations based on RF Federal Customs Service data

Table 3.18 Structure of Russia's imports of bananas (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Brazil							0.0	0.0
Viet Nam	0.5	0.2	0.1	0.1	0.0	0.1	0.0	0.1
China	0.2	0.2	0.3	0.3	0.4	0.4	0.2	0.2
Colombia	4.6	4.4	3.2	3.3	0.5	0.5	0.9	0.9
Costa Rica	0.9	0.9	1.8	1.8	3.3	3.4	4.5	4.7
Mexico					0.3	0.3	0.1	0.1
Ecuador	90.1	90.4	91.7	91.6	92.9	92.7	91.4	91.2
Philippines	0.6	0.7	2.5	2.5	2.5	2.6	2.8	2.8
Panama	3.2	3.2	0.5	0.5	0.0	0.1		
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	97.8	97.5	99.8	99.8	100.0	100.0	100.0	100.0

Source: Calculations based on RF Federal Customs Service data

Table 3.19 Russia's imports of citrus

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina	42011	11219.5	129653	68511.9	108187	85899	120132	101680.2
Brazil	3900	1073.7	1433	747.2	4133	3365.2	2297	2049.1
Egypt	456	124	90260	42512.7	130585	110405.2	152745	131008.9
China	19991	5920.6	49219	29054.9	115126	89115.8	118812	98660.8
Morocco	165841	46036.3	195688	110851	216905	191082.7	233167	209781.6
Pakistan	39	12.2	15401	8228.6	43477	39721.7	82944	74860
Turkey	83381	24698.4	267825	125220.1	365170	266039.8	400215	341305.5
Uruguay	15883	4295.8	20595	10840.5	8982	7862.9	14194	12614
South Africa	27130	7584.3	68649	35800.9	133521	109387.2	186608	156162.3
Imports from developing countries	358632	100964.8	838723	431767.8	1126086	902879.5	1311114	1128122.4
Total imports from non-CIS countries	439373	124894	902407	466715.5	1267217	1011775	1480955	1274150.4

Source: Calculations based on RF Federal Customs Service data

Table 3.20 Structure of Russia's imports of citrus (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina	11.7	11.1	15.5	15.9	9.6	9.5	9.2	9.0
Brazil	1.1	1.1	0.2	0.2	0.4	0.4	0.2	0.2
Egypt	0.1	0.1	10.8	9.8	11.6	12.2	11.7	11.6
China	5.6	5.9	5.9	6.7	10.2	9.9	9.1	8.7
Morocco	46.2	45.6	23.3	25.7	19.3	21.2	17.8	18.6
Pakistan	0.0	0.0	1.8	1.9	3.9	4.4	6.3	6.6
Turkey	23.2	24.5	31.9	29.0	32.4	29.5	30.5	30.3
Uruguay	4.4	4.3	2.5	2.5	0.8	0.9	1.1	1.1
South Africa	7.6	7.5	8.2	8.3	11.9	12.1	14.2	13.8
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	81.6	80.8	92.9	92.5	88.9	89.2	88.5	88.5

Source: Calculations based on RF Federal Customs Service data

Table 3.21 Russia's imports of grape

	2000		2005		2009		2010	
	volume, tonne	value, t USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand	volume, tonne	value, USD thousand
Argentina	100	37.6	10436	8162.5	9793	13414.7	12142	17004
Afghanistan	16458	5352.7	8627	3827	10533	13925.6	14452	18671.4
Iran	13881	2789.5	37975	17655.9	22359	34299.3	29941	45869.8
Turkey	6630	2513.5	75249	53858.9	131773	183151.5	172664	256697.5
Chile	1412	594.8	29980	22830.2	40559	56634.8	50028	71904.2
South Africa	1944	803.8	8342	5907.7	11654	16424.6	13358	20367.1
Imports from developing countries	40425	12091.9	170609	112242.2	226671	317850.5	292585	430514
Total imports from non-CIS countries	44867	15229.9	214760	145514.4	287254	405205.9	367934	553199.2

Source: Calculations based on RF Federal Customs Service data

Table 3.22 Structure of Russia's imports of grape (%)

	2000		2005		2009		2010	
	volume	value	volume	value	volume	value	volume	value
Argentina	0.2	0.3	6.1	7.3	4.3	4.2	4.1	3.9
Afghanistan	40.7	44.3	5.1	3.4	4.6	4.4	4.9	4.3
Iran	34.3	23.1	22.3	15.7	9.9	10.8	10.2	10.7
Turkey	16.4	20.8	44.1	48.0	58.1	57.6	59.0	59.6
Chile	3.5	4.9	17.6	20.3	17.9	17.8	17.1	16.7
South Africa	4.8	6.6	4.9	5.3	5.1	5.2	4.6	4.7
Imports from developing countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of developing countries in total imports from non-CIS countries	90.1	79.4	79.4	77.1	78.9	78.4	79.5	77.8

Source: Calculations based on RF Federal Customs Service data

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