IPNI
INTERNATIONAL
PLANT NUTRITION
INSTITUTE

Ongoing agricultural transformation in rural Russia

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IPNI is supported by leading fertilizer manufacturers and industry associations

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- Belarusian Potash Company
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- Incitec Pivot
- International Zinc Association (IZA)
- Intrepid Potash, Inc.
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- The Mosaic Company
- OCP S.A.
- PotashCorp
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- Sinofert Holdings Limited
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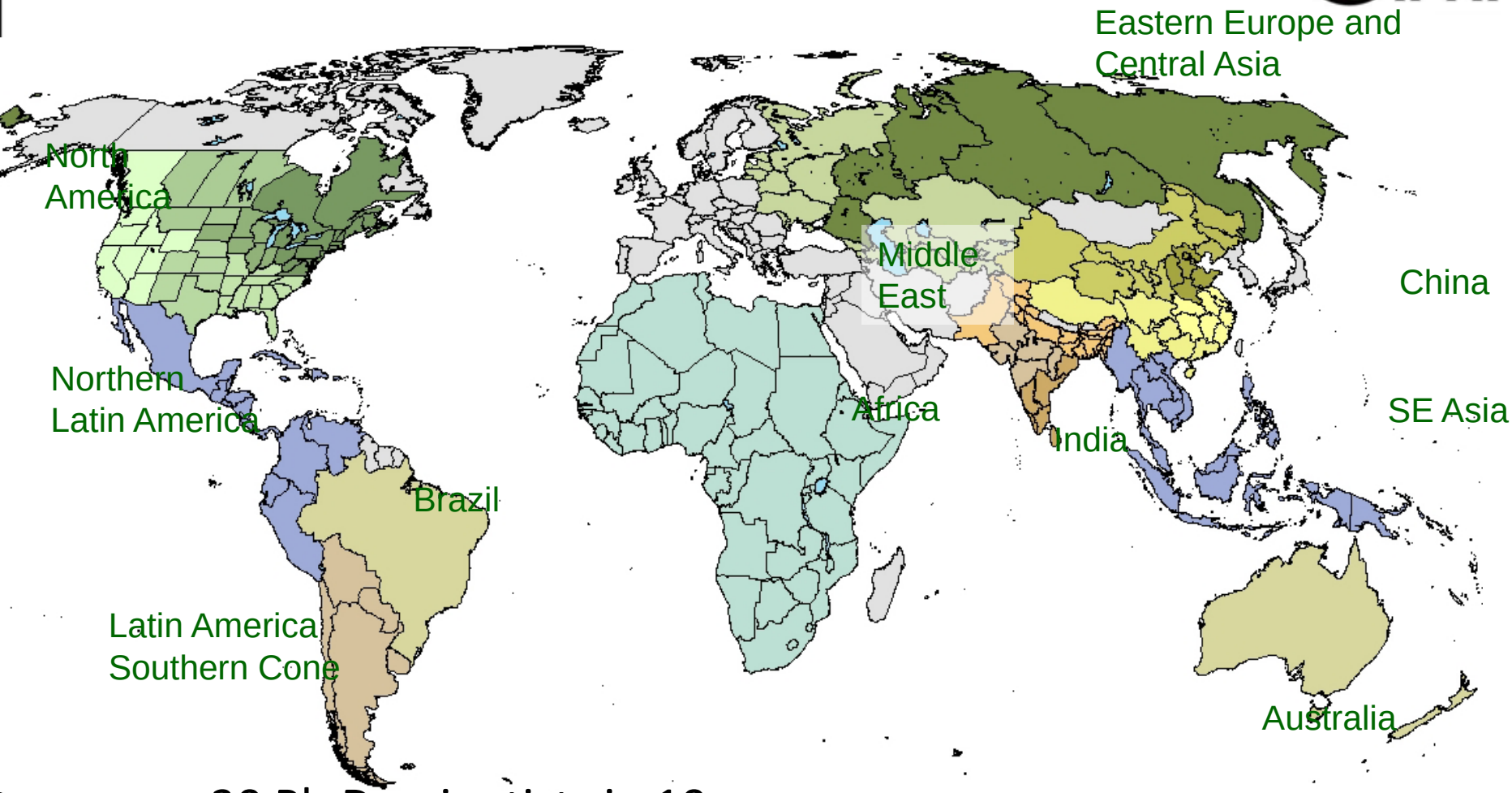
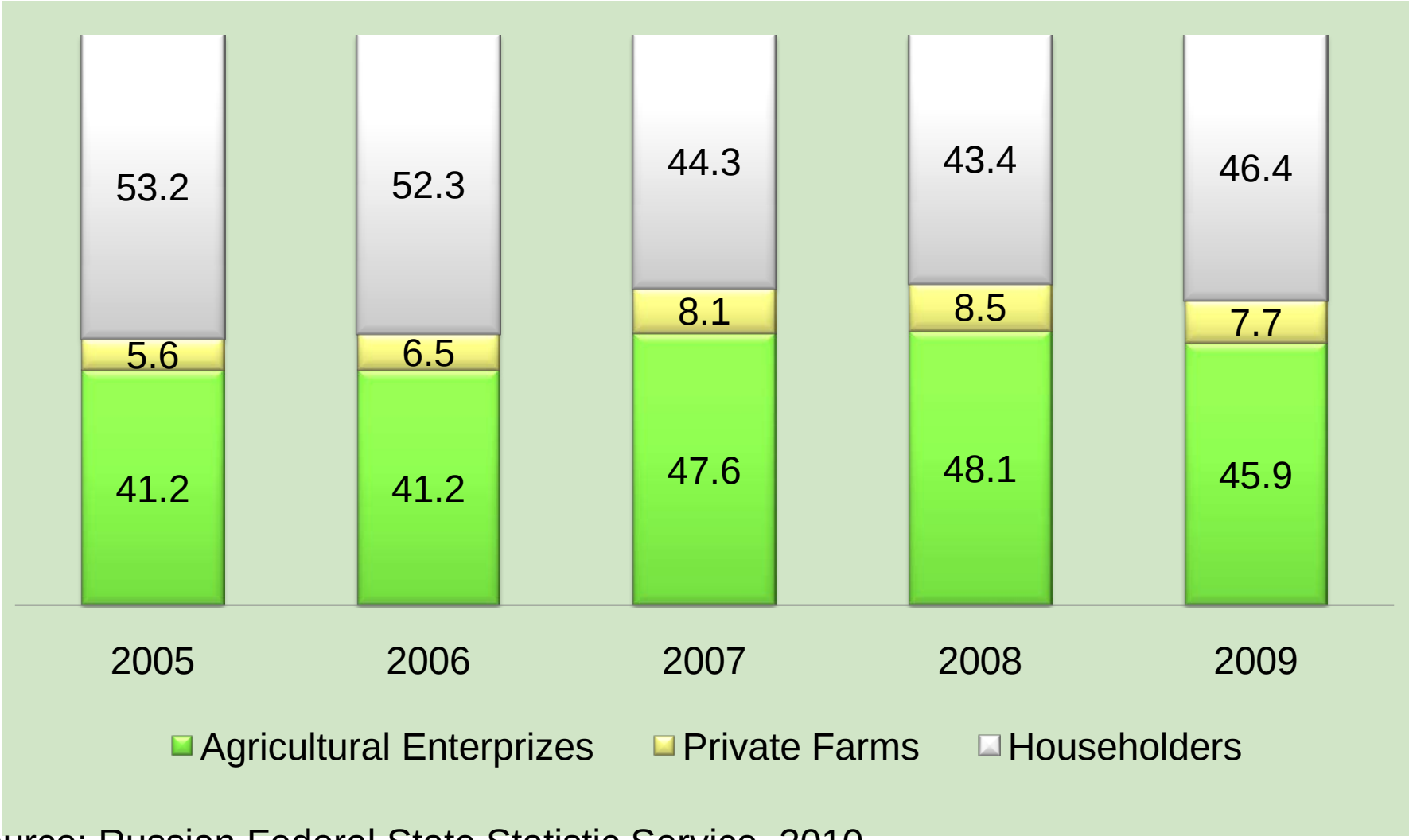
- Terra Industries, Inc.
- Uralkali
- Arab Fertilizer Association (AFA)
- Canadian Fertilizer Institute (CFI)
- Foundation for Agronomic Research (FAR)
- International Fertilizer Industry Association (IFA)
- International Potash Institute (IPI)
- The Fertilizer Institute (TFI)

IPNI Current Programs



- 30 Ph.D. scientists in 10 program areas
  - 9 scientists in North America
  - 17 scientists in International regions
  - 4 in management

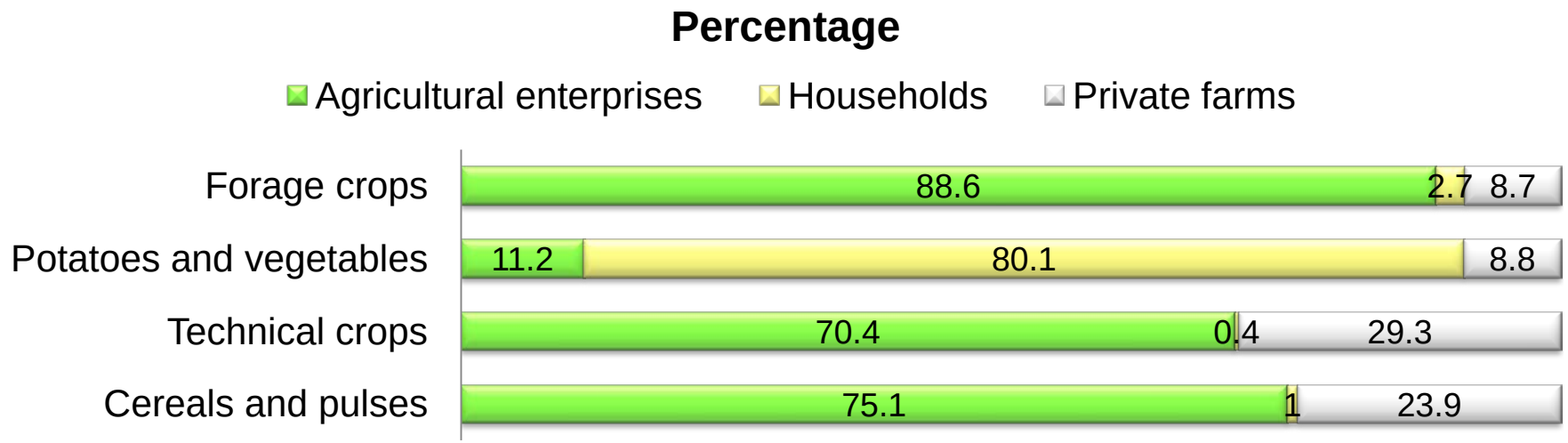
Structure of Agricultural Production by Farm Types (%)



Source: Russian Federal State Statistic Service, 2010

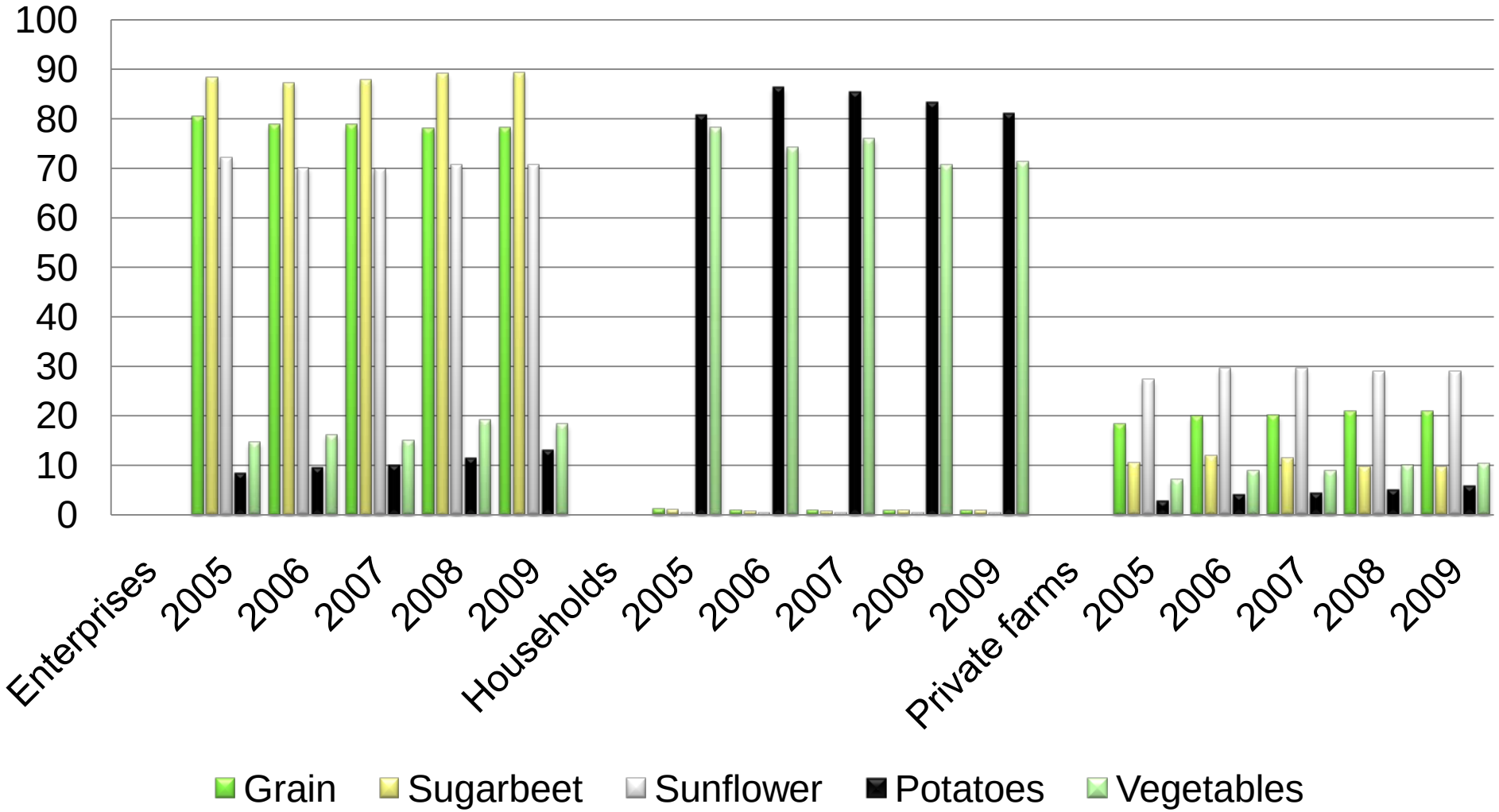
Sown Area Distribution by Farm Types, millions ha

	Cereals and pulses	Technical crops	Potato and vegetables	Forage crops
Agricultural enterprises	35.71	6.31	0.34	16.21
Households	0.47	0.03	2.40	0.50
Private farms	11.37	2.40	0.26	1.58
Total	47.55	8.96	3.00	18.29



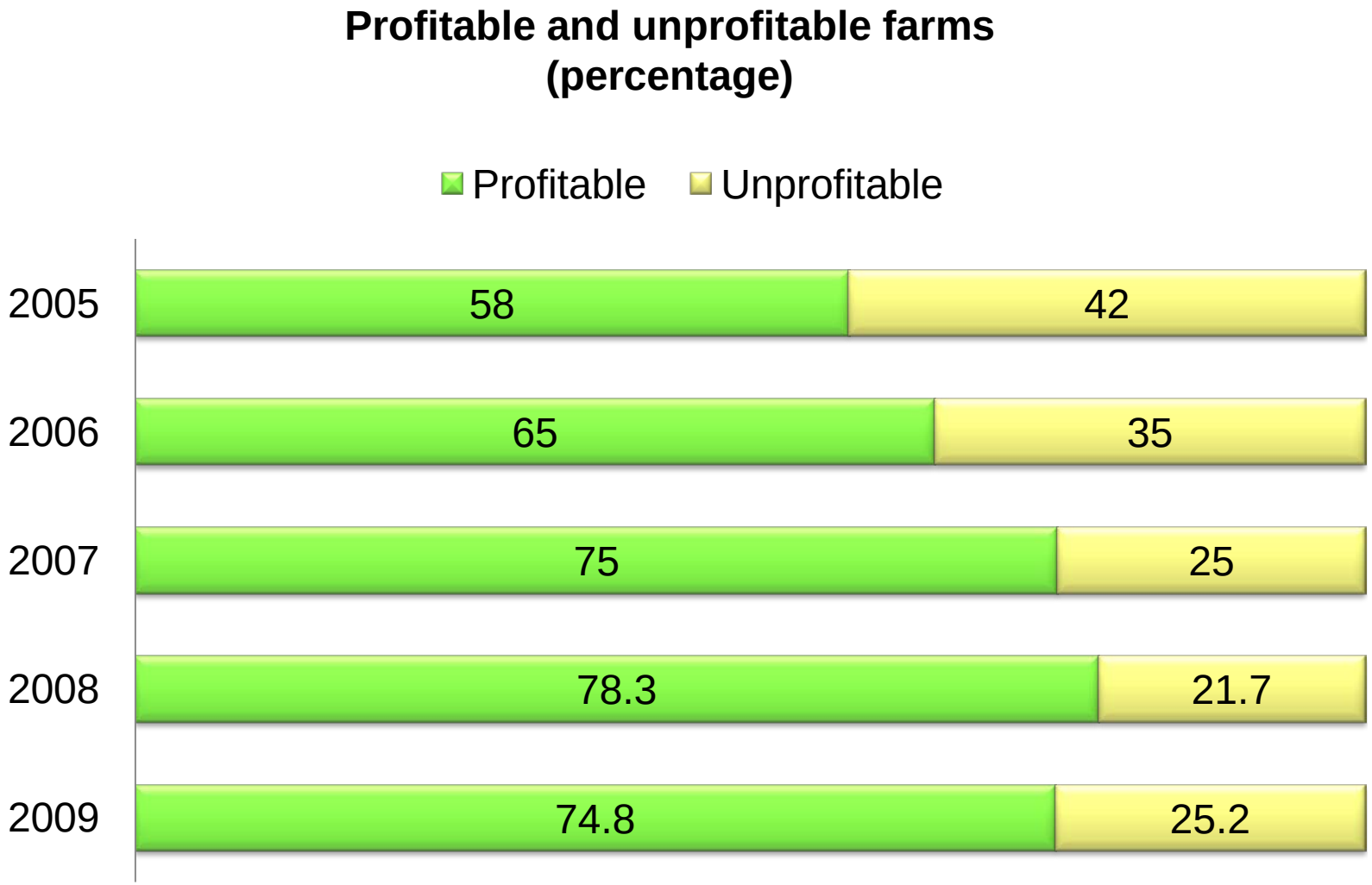
Source: Russian Federal State Statistic Service, 2010

Main Crop Production by Farm Types (percentage)



Source: Russian Federal State Statistic Service

Financial and Economic Indexes of Farm Activities



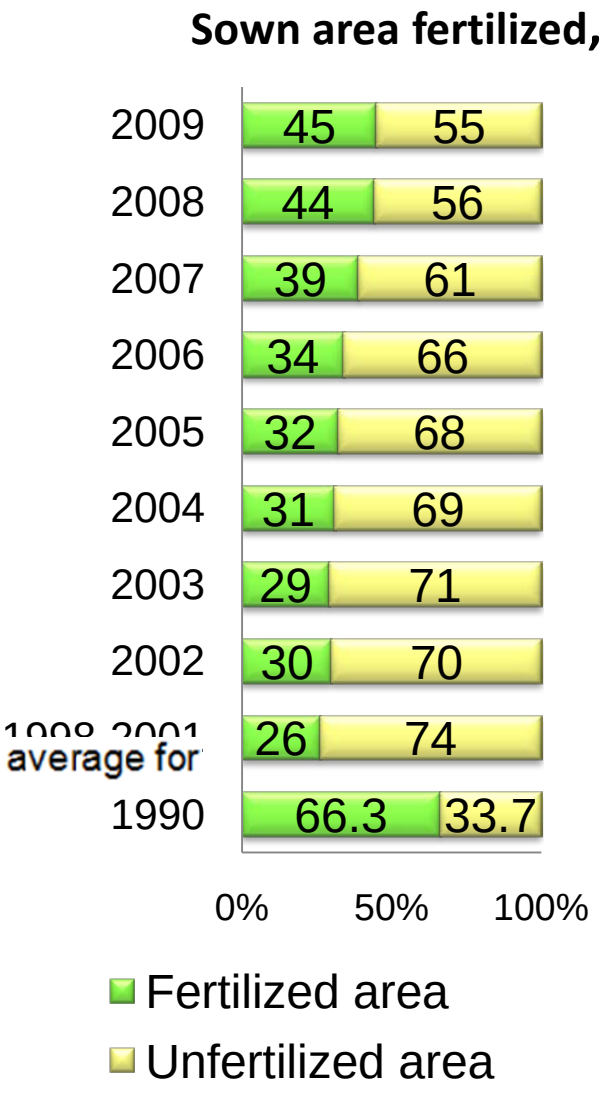
Source: Russian Federal State Statistic Service, 2010

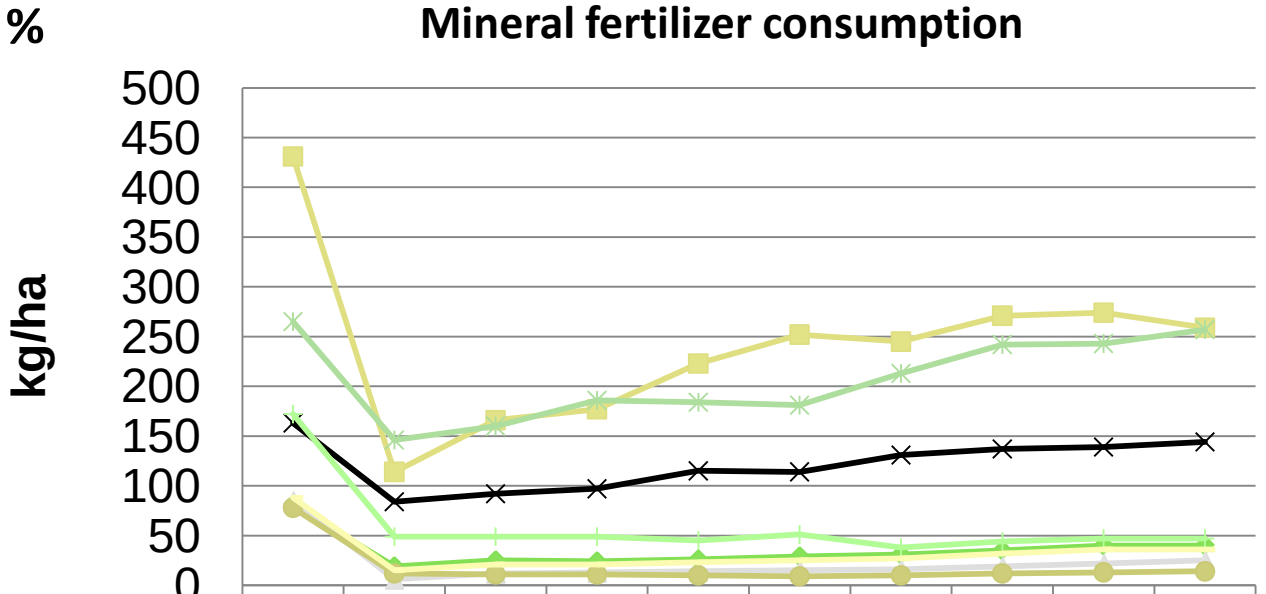
Crop Yields, t/ha

	2005	2006	2007	2008	2009
Cereals					
winter and spring wheat	1.93	1.95	2.10	2.45	2.32
winter and spring rye	1.57	1.71	1.92	2.11	2.07
winter and spring barley	1.81	1.89	1.87	2.46	2.31
oat	1.44	1.47	1.63	1.71	1.79
grain maize	3.85	3.62	2.93	3.86	3.53
millet	1.12	1.04	1.12	1.38	1.00
buckwheat	0.73	0.81	0.84	0.92	0.90
rice	4.20	4.39	4.51	4.60	5.16
Pulses	1.54	1.60	1.41	1.84	1.66
Sugar beet	28.23	32.54	29.20	36.24	32.17
Sunflower	1.19	1.14	1.13	1.23	1.15
Soybean	0.94	0.91	0.85	0.97	1.11
Potatoes	12.14	13.02	12.90	13.75	14.20
Vegetables	17.49	17.89	18.38	19.62	19.43

Source: Russian Federal State Statistic Service, 2010

Fertilizer Consumption by Crop



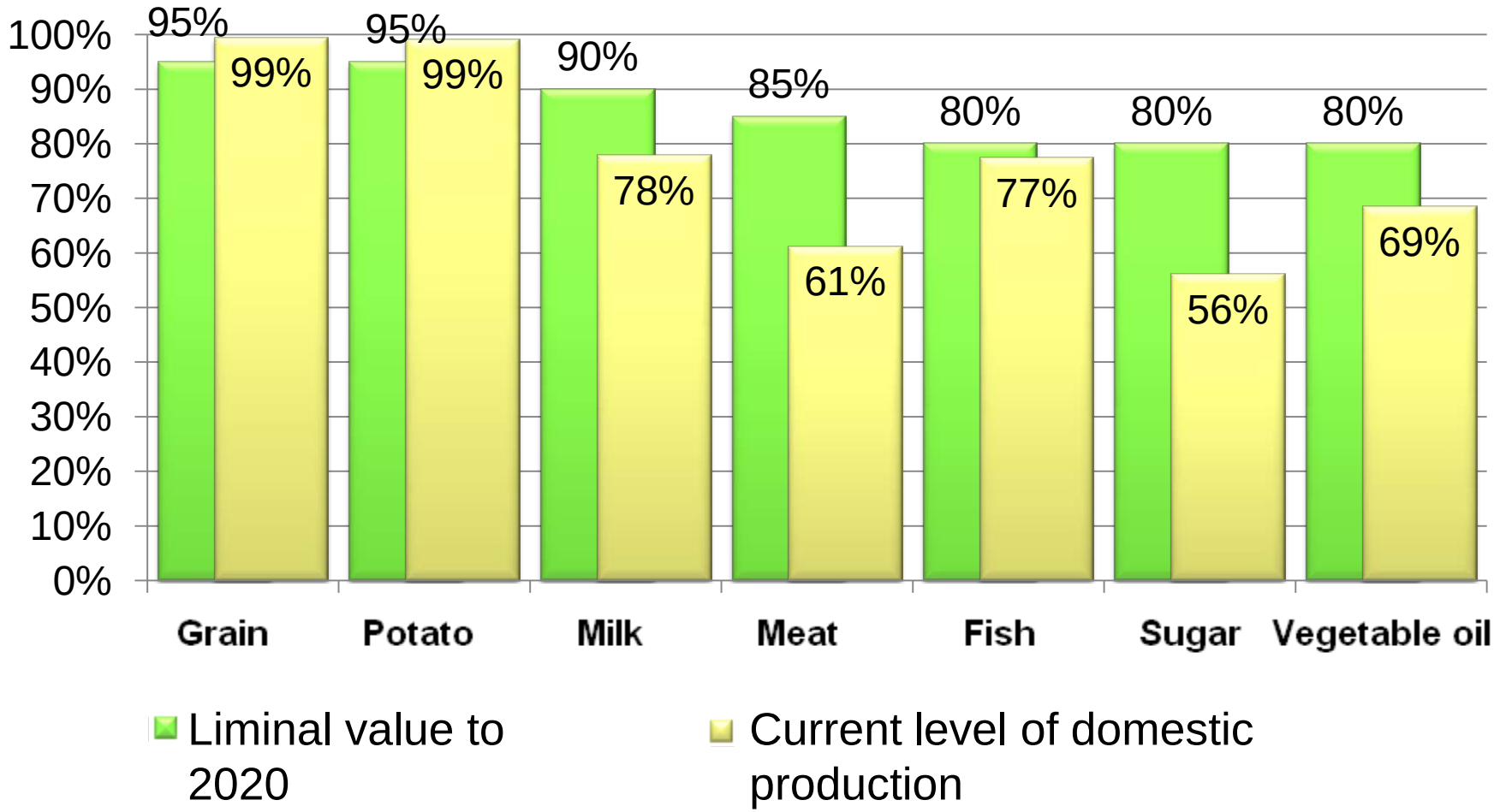


	1990	average 1998 - 2001	2002	2003	2004	2005	2006	2007	2008	2009
Cereals	81	19	25	24	26	29	31	35	40	40
Sugarbeet	431	114	166	177	223	252	245	271	274	259
Sunflower	85	6	12	13	14	15	16	19	22	25
Vegetables	163	84	92	97	115	114	131	137	139	144
Potatoes	265	146	160	186	184	181	213	242	243	257
Fodder	78	12	11	11	10	9	10	12	13	14
Fiber flax	172	49	49	49	45	51	38	44	47	47
All	88	15	21	21	23	25	27	32	36	36

Source: Russian Federal State Statistic Service, 2010

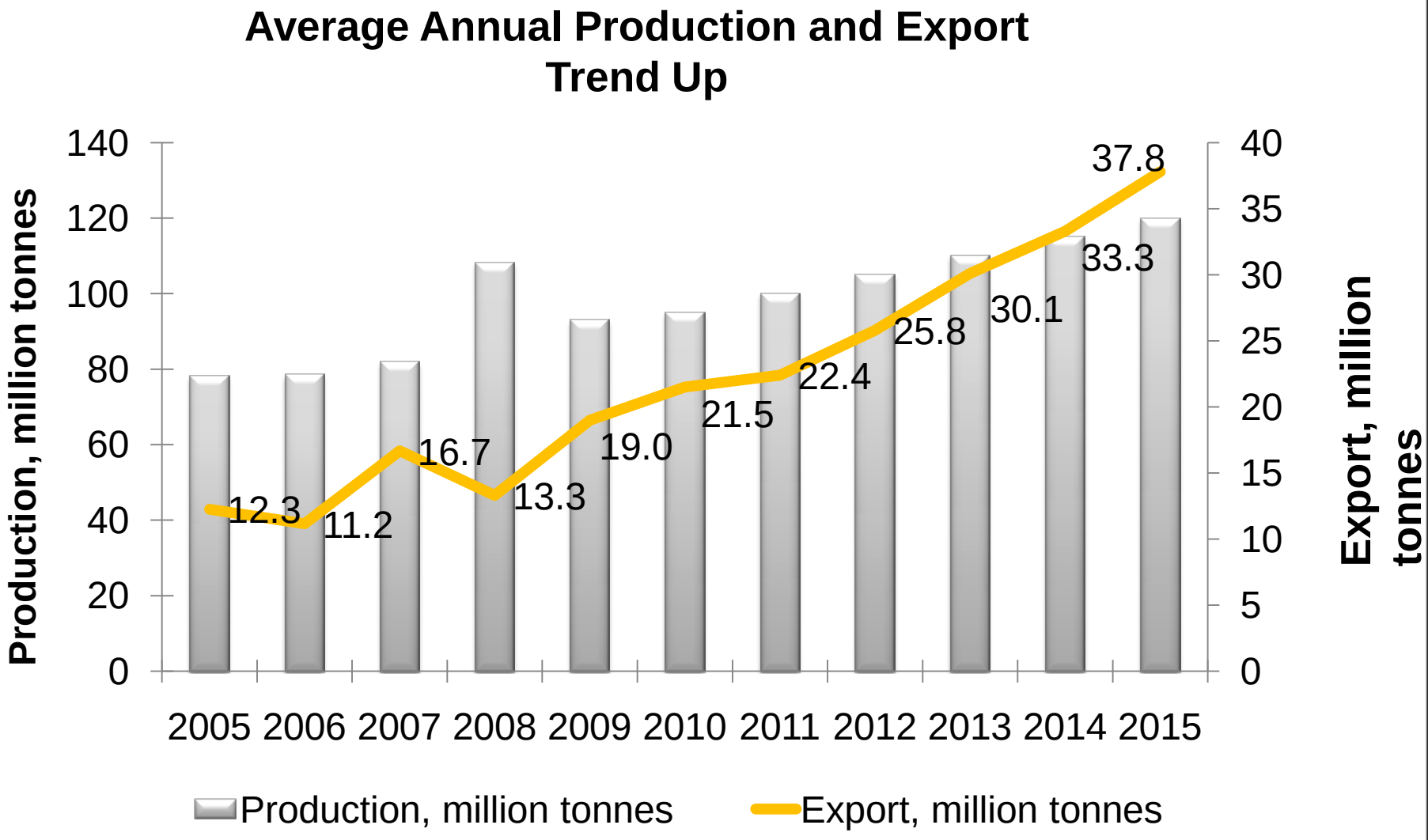
Food Security doctrine: new stability target for domestic market

Food security criteria is a share of domestic production in the total volume of marketable resources



Source: Russian Ministry of Agriculture, 2010

Evolution of Grain Production and Exports in Russia



Source: Strategic plan of United Grain Company, 2010

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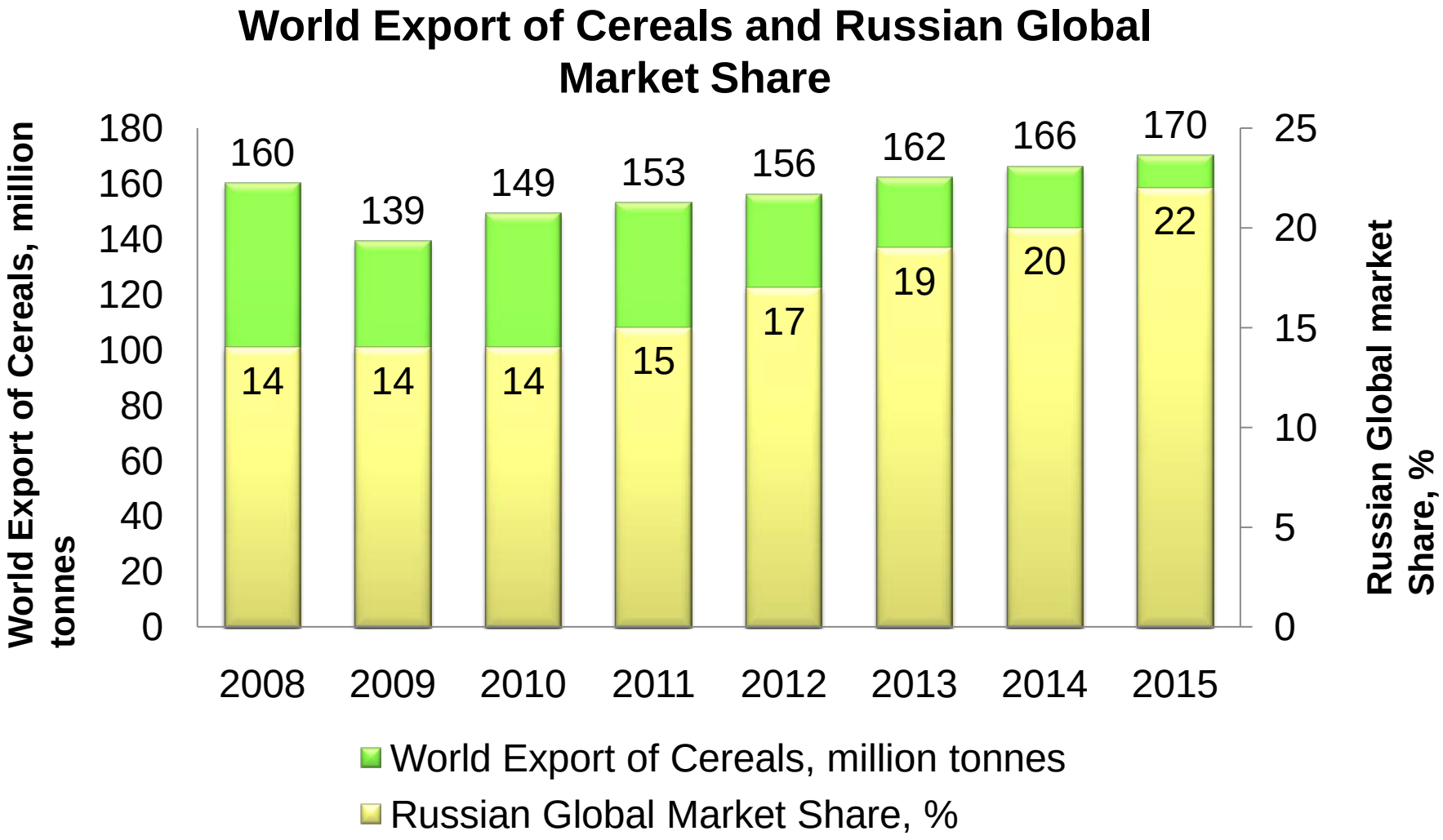


Source: Strategic plan of United Grain Company, 2010

United Grain Company

Program of domestic grain market infrastructure development (investments $3.67 billions)

Grain export potential to 16 million tonnes to 2015

Elevators building and reconstruction

Expansion of rolling stock and rail facilities carrying capacity

Sea grain terminals building

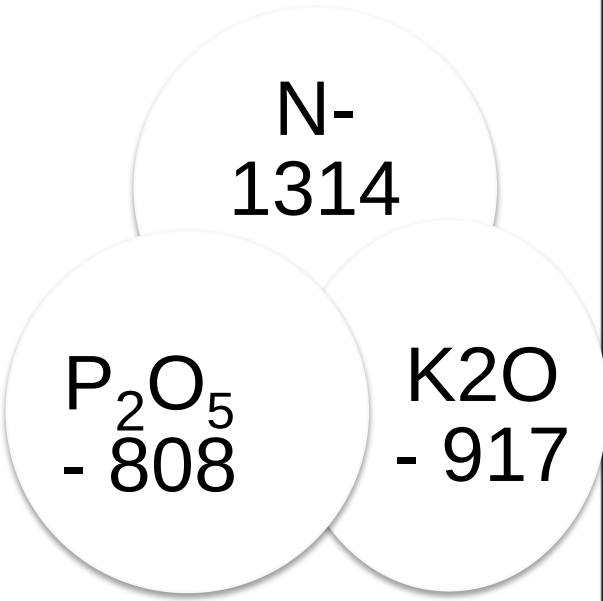
- Traditional markets for grain from Russia - North Africa and Middle East (11.5 million tonnes)
- New markets – South-East Asia and Latin America (4.5 million tonnes)

Source: Strategic plan of United Grain Company, 2010

Potential in Fertilizer Consumption by Crop in Russia, thousand tones

Crop	Nutrient	2009	2020	2020 versus 2009
Wheat	N	917	1993	1076
	P_2O_5	262	872	610
	K_2O	131	872	741
Maize grain	N	72	221	149
	P_2O_5	26	87	61
	K_2O	16	131	115
Sugar beets	N	92	120	28
	P_2O_5	57	138	81
	K_2O	62	120	58
Maize forage & silage	N	54	115	61
	P_2O_5	11	67	56
	K_2O	10	67	57

Total additional nutrients to 2020:



Source: www.agristats.ipni.net

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Thank you for attention!

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EECA program

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