



**FAO AGRICULTURE AND TRADE POLICY**

**BACKGROUND NOTE**

**R U S S I A**



# FAO Agriculture and Trade Policy Background Note

## Russia

### 1. Main characteristics of Russia's agricultural sector

Although agriculture plays a relatively minor role in the overall economy when measured by value added and share in total exports compared to some other sectors, in particular oil and mining, it is still an important sector in terms of employment with a share of 9.7%. The share of agriculture value added in the GDP is low at 4% and the sector registered slow growth in real terms at 1.3% on average between 2000 and 2010. The agrarian system is characterized by the co-existence of large commercial producers with smallholders that predominately produce for own consumption and informal markets.

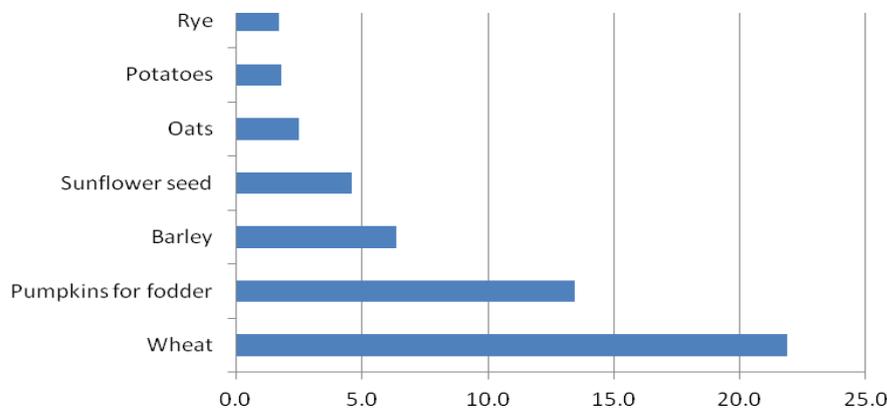
**Table 1: Agricultural sector indicators for Russia, 2010**

GDP, current US\$ billion	1,488
Population, million	141.9
Rural population, % in total	26.3
Agricultural land, % in total*	13.2
Agriculture, value added (% of GDP)	4.0
Average annual growth in agriculture value added 2000-2010, at constant prices (%)	1.34
Employment in agriculture (% of total employment)*	9.7
Share of agricultural products in total exports	1.5

Source: FAOSTAT and WDI

The main crops grown in Russia as measured by area cultivated are wheat, barley, sunflower seed, oats, potatoes and rye. The largest share of arable is dedicated to wheat, which with 26.6 million hectares in harvested area in 2009 occupied 21.9% of all arable land in Russia (Graph 1).

**Graph 1: Share of area harvested in total arable land, main crops (2009)**

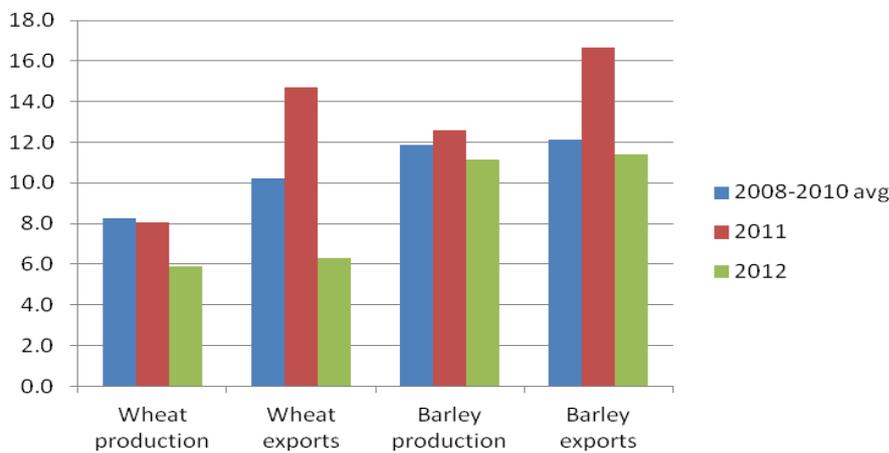


Source: FAOSTAT

In 2012 Russia produced 11.2% of world's barley, 5.9% of wheat, 4% of milk and milk products and 3% of sugar and poultry. Although the share of Russia in the global production of oil crops is low (approximately 2%), it produced 20% of all sunflower oil in the world in 2010. Soybean production, although still low in comparison to other countries, has almost quadrupled from 342 thousand tonnes in 2000 to 1.22 million tonnes in 2010.

Since 2000 Russia has emerged as one of the major exporters of grains. It is the fifth largest exporter of wheat after USA, Australia, Canada and the European Union with a 14% market share in 2011. It is also a major exporter of barley, with exports reaching 16% of world total in 2011 (Graph 1). For 2012 the production of both wheat and barley is expected to decline substantially due to severe drought, reducing their respective market shares.

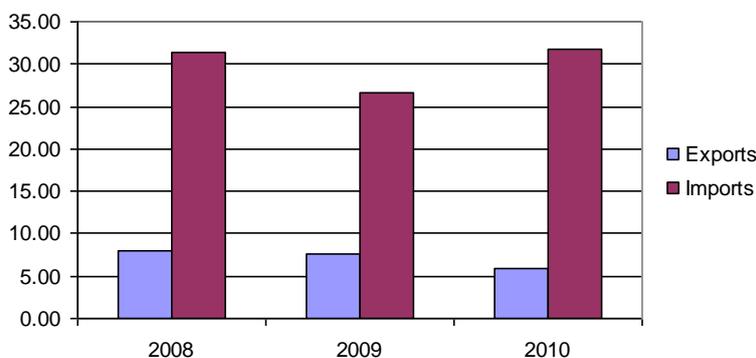
**Graph 2: Russia's share in world production and exports of wheat and barley by volume**



Source: FAO Food Outlook November 2012

Russia has traditionally been a net food importer, with a trade deficit in agricultural and food products of US\$26 billion in 2010 (Graph 3), and one of the main importers of meat and raw sugar in the world.

**Graph 3: Russia's agro-food trade, 2008-2010 (US\$ billion)**



Source: FAOSTAT

The main agricultural exports and imports of Russia as measured by value of trade are shown in tables 2 and 3. Wheat accounted for one third of the total value of agricultural and food exports of Russia in the period 2008-2010 making it the single most important agricultural product in terms of export revenues and agricultural incomes. Imports are more evenly distributed, but with bovine meat, pork and poultry together accounting for 18.8% of all agro-food imports in the 2008-2010 period.

**Table 2: Russia's main agricultural export products, average value in 2008-10**

	Export value million US\$	Share in agro exports %
Wheat	2,562.2	36.1
Sunflower oil	544.8	7.7
Tobacco	423.9	6.0
Beverages	363.8	5.1
Barley	320.1	4.5
Milk (equivalent)	222.7	3.1
Oilseed Cake Meal	142.6	2.0
Sugar and Honey	131.0	1.8
Total agricultural exports	7,088.0	100.0

**Table 3: Russia's main agricultural import products, average value in 2008-10**

	Import value million US\$	Share in agro imports %
Bovine meat	2,399.1	8.0
Beverages	2,203.2	7.4
Pig meat	2,111.4	7.0
Milk (equivalent)	1,539.9	5.1
Tobacco	1,207.8	4.0
Sugar and honey	1,172.6	3.9
Poultry Meat	1,136.1	3.8
Cheese	1,094.2	3.7
Total agricultural imports	29,972.3	100.0

Beverages: Beer, wine and spirits

Source: FAOSTAT

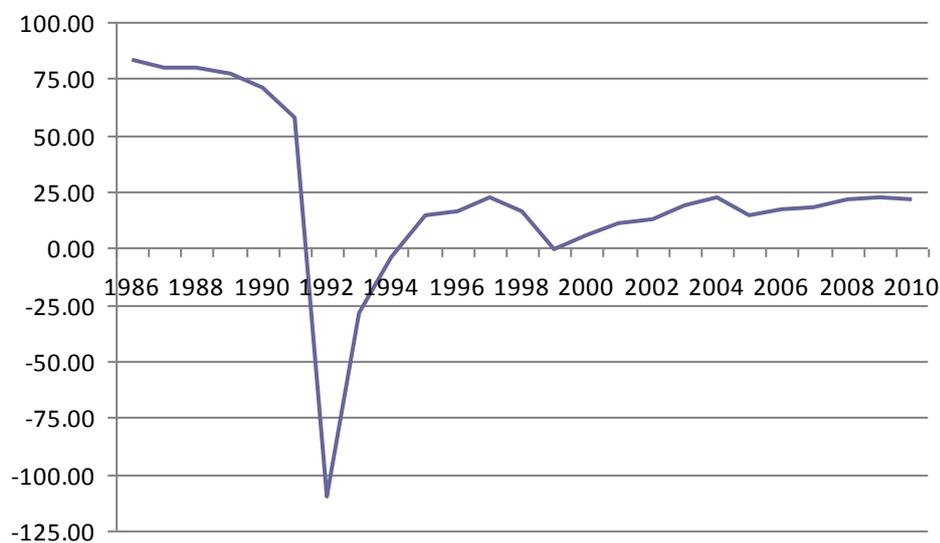
## 2. Agricultural and trade policy

Since 1990 the evolution of agricultural policy in Russia has been deeply affected by the overall transformation of the economic structure following the collapse of the Soviet Union, undergoing dramatic changes for the past two decades. Serova and Shick (2007) define three periods with distinct agricultural policy frameworks. The first, between 1991 and 1994 was shaped by the crumbling of the planned economy and rapid market liberalization in all areas, agricultural sector included, which meant that virtually all forms of state support were dismantled. In that period the government relied on trade policy to guarantee sufficient supplies by subsidizing imports and restricting exports.

In the second stage between 1994 and 1998 the focus on liberalization of agricultural markets was replaced by inward looking and protectionist policies with minimum guaranteed prices to producers, import barriers and export subsidies. A state entity for regulating agricultural markets (FAP) was established. As the economic situation in Russia stabilized following the collapse of the old economic system and agricultural producers gained experience in operating under market conditions, becoming increasingly more focused and organized, agricultural policy once again became more protectionists with a larger share of the state budget allocated to agriculture. The orientation towards import substitution was reinforced by the adaptation of a Doctrine on Food Security in the wake of the spike in food prices during 2007-2008, setting self-sufficiency targets for the main food products consumed in Russia.

The abrupt decline in the early 1990s and the subsequent increase in government support to agriculture is clearly demonstrated by the evolution of the share of Producer Support Estimate (PSE) in the total value of total gross farm receipts as calculated by OECD<sup>1</sup> (Graph 4). The absence of any producer support in 1999 was the consequence of the 1998 financial crisis that hit the state budget hard. The subsequent recovery and the steady growth in state support to agriculture resulted in higher levels of protection. In 2010 the percentage PSE stood at 21.37%, above the 18.83% average for the OECD area. As such the trend in Russia since 2005 has been the opposite of the trend in the OECD where the percentage PSE has been on a steady decline.

**Graph 4: PSE % (The share of PSE in the total value of total gross farm receipts)**



<sup>1</sup> Producer Support Estimate (PSE) is the annual monetary value of gross transfers from consumers and taxpayers to agricultural producers, measured at the farm-gate level, arising from policy measures that support agriculture, regardless of their nature, objectives or impacts on farm production or income. Percentage PSE (%PSE) is the PSE as a share of gross farm receipts (including support)  
<http://www.oecd.org/tad/agriculturalpoliciesandsupport/41120402.pdf>.  
<http://www.oecd.org/agriculture/agriculturalpoliciesandsupport/producerandconsumersupportestimatesdatabase.htm>

The increase in producer support has been particularly noticeable since 2005, reaching the level of 471.4 billion RUB in 2010 (Graph 5). The expansion has been driven by more restrictive border measures for key agricultural imports as well as larger budgetary transfers to the sector.

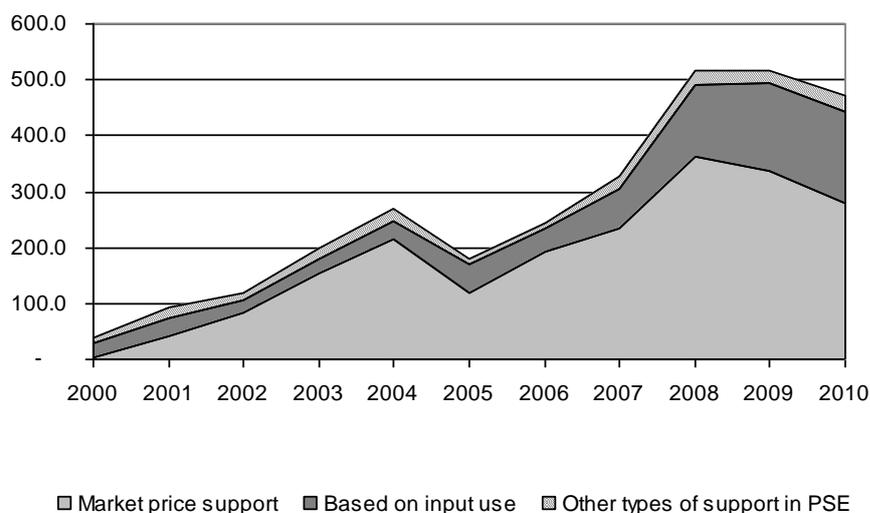
Market price support (MPS) and payments based on input use are the two types of support that constitute the bulk of PSE, but the relative weight of each group has changed overtime. In 2005 the share of market price support in total PSE was 78.0% and the share of input-based subsidies only 17.2%. By 2010 the share of payments based on input use has doubled to 34.4%, while the share of MPS declined to 59.3%. Input subsidies include transfers for purchases of seeds, fertilizers, chemicals, animal feed and other inputs as well as targeted programs such as the Pedigree livestock programme<sup>2</sup>. Subsidies for interest rates and insurance subsidies are also included in this category. The combined share of MPS and input-based subsidies, the two most distorting types of agricultural support, increased from 76.2% in 2000 to 93.6% in 2010.

The value of MPS increased substantially in 2007 and 2008, registering annual growth rates of 21.6% and 55.9%, respectively, at the same time as world prices for main agricultural commodities were increasing, indicating that border measures rather than other possible measures such as administered prices were driving support to agriculture during that time. If minimum prices were driving the MPS, the increase in food prices would have narrowed the gap between target prices and world prices, reducing the need for subsidies. After reaching a record high in 2008, MPS subsequently declined in 2009 and 2010, while subsidies for inputs increased.

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<sup>2</sup> Partial compensation of costs of keeping female breeding animals, breeding bulls and purchase of semen

**Graph 5: The composition of PSE by main category, 2000-2010, RUBS billion**

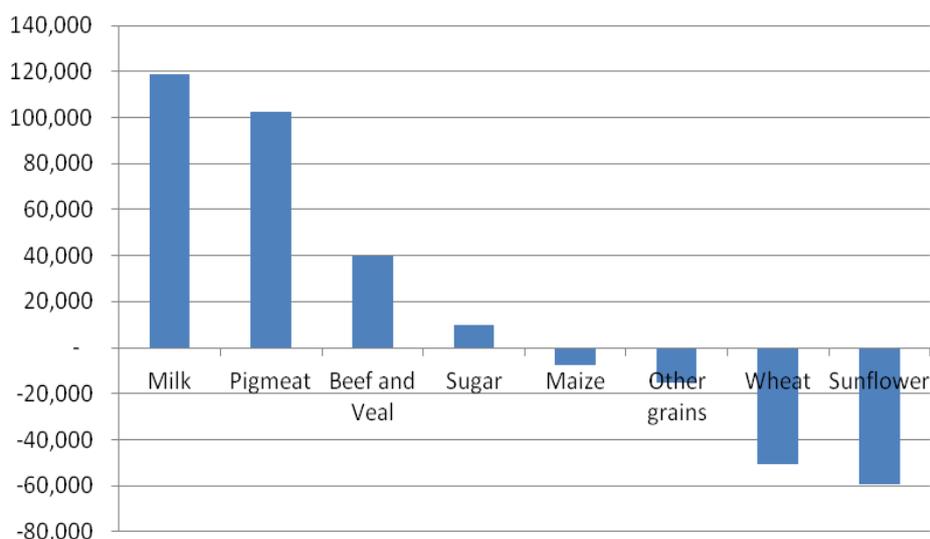


Source: OECD Producer and Consumer Support Estimates database

The medium-term State Programme for Development of Agriculture is the main framework for regulation and government assistance in the agricultural sector and is elaborated on the basis of the Law on Agricultural Development from 2006. One of the main priorities of the State Programme for 2008-12 was to foster domestic production, improving the competitiveness and the quality of agricultural products. Fostering domestic production and import substitution through an array of subsidy programmes, especially for the livestock sectors, is one of the cornerstones of the State Programme for 2008-12. The state support to agriculture is channelled through a number of sub-programmes financed jointly through the federal and regional budgets.

The distribution of transfers across single commodities (Graph 6) shows that the main agricultural export products such as wheat and vegetable oils are taxed, while the biggest beneficiaries of state support are dairy and meat producers. As mentioned earlier, stimulating livestock production is one of the key priorities of the current Russian agricultural policy, and incentives to the producers are provided through a combination of border protection and support for input purchase and investments. Livestock producers also enjoy access to feeder grain below the world market prices. Thus, the current policy results in an implicit transfer of welfare from crop to livestock producers.

**Graph 6: Producer Single Commodity Transfers, RUB million, 2010**



Source: OECD Producer and Consumer Support Estimates database

The main instruments of agricultural support are per tonne payments, subsidies for inputs and concessional lending. The government also intervenes in grain markets by accumulating stocks and carrying out purchases and sales of grains if the prices move outside the established price band. The direct payments are established per tonne of marketed meat, milk, eggs and wool, with 80% of total payments to livestock producers going to the milk sub-sector (OECD, 2011). In addition, some regions provide support for grains, potatoes and other crops, and the federal government funds per tonne payment to flax and hemp producers. These per tonne payments are classified as “payments based on output” (not included in the MPS) by OECD and constitute a small share (approximately 2%) of the total PSE.

One of the major tools of support is subsidized credit to the agricultural sector. In 2009, the share of this measure was about 45% of the total Aggregate Measure of Support (AMS)<sup>3</sup> (WTO, 2011). Most of this support is allocated to large farms and agricultural enterprises as short-term loans and for investment purposes. The amount of concessional lending increased

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<sup>3</sup> According to WTO, all domestic support measures considered to distort production and trade (with some exceptions) fall into the so-called amber box. These include measures to support prices, or subsidies directly related to production quantities. The reduction commitments for these types of subsidies are expressed in terms of Total Aggregate Measurement of Support (Total AMS)

([http://www.wto.org/english/tratop\\_e/agric\\_e/agboxes\\_e.htm](http://www.wto.org/english/tratop_e/agric_e/agboxes_e.htm)). The AMS calculation of market price support is based on a fixed, historical world reference prices rather than current world prices. Unlike the AMS, the purpose of the PSE described earlier in the note is to monitor and evaluate progress in agricultural policy reform, whereas the AMS is the basis for a legal commitment to reduce domestic support in the WTO Agreement on Agriculture. The PSE and AMS are closely related, but there are important differences. The PSE covers all transfers to farmers from agricultural policies, whereas the AMS covers only domestic policies deemed to have the greatest production and trade effects (amber box). (Refer to the OECD Agricultural Support: How is it Measured and What does it Mean? (2004) for more information

<http://www.oecd.org/agriculture/agriculturalpoliciesandsupport/32035391.pdf>

rapidly from 114 billion RUB in 2005 to 530 billion RUB in 2010, exceeding the value of PSE. This expansion was accompanied by a substantial increase in the government expenditure on interest rate subsidies, going in particular to subsidized investment credit to foster capitalization of the livestock sector.

The shocks that affected Russian agriculture since 2008 – the surge in food prices, the global economic crisis of 2009 and the severe drought in Russia in 2010 – triggered government responses to contain the increases of food prices to consumers and to provide relief to agricultural producers. Additional government assistance to the sector was provided during 2009 and 2010, and export restrictions were introduced to ensure sufficient domestic supplies of grains.

## Border measures

### *Tariffs*

Although some sub-sectors receive significant payments directly from the state budget, the bulk of producer support is generated by border measures (OECD, 2011). The pre-WTO accession market access for agricultural products is characterized by relatively high tariffs on selected products and the use of Tariff Rate Quotas (TRQ) for meat imports, the largest import category. In 2011 the average MFN tariff on agricultural and food products was 14.3%, increasing to 17.5% when calculated using import weights. The distribution of tariffs is shown in Table 4. It demonstrates that 61.8% of all agro-food imports by value are subject to a tariff equal or above 10%.

**Table 4: Distribution of applied MFN tariffs on agricultural products in 2011**

Frequency distribution	Duty-free	0 <= 5	5 <= 10	10 <= 15	15 <= 25	25 <= 50	50 <= 100	> 100
	Tariff lines and import values (in %)							
Agricultural products								
By number of tariff lines	7.8	34.8	8.2	31.8	10.5	3.5	2.9	0.3
By import value (2010)	9.9	22.3	6.1	28.7	18.9	8.2	5.9	0.1

Source: WTO Tariff Profiles (<http://stat.wto.org>)

The highest tariffs are registered in animal products, in particular meats, and beverages and tobacco (Table 5). In particular, the out of quota tariffs on poultry, pork and beef are high, with 80%, 65% and 55% tariffs, respectively. The tariffs on dairy products vary in general between 15% and 20%, and duties on some products such as cheese, skim milk powder and butter have increased since 2009.

**Table 5: Applied MFN tariffs by product group (by tariff line)**

<b>Product groups</b>	<b>Average tariff</b>	<b>Share of duty-free</b>	<b>Max tariff</b>
Animal products	24.7	11.3	80
Dairy products	17.7	0	25
Fruit, vegetables, plants	11.0	5.3	19
Coffee, tea	7.7	20.8	20
Cereals & preparations	18.7	3.0	90
Oilseeds, fats & oils	8.7	9.6	25
Sugars and confectionery	13.3	0	50
Beverages & tobacco	35.2	4.9	335
Cotton	0.0	100.0	0
Other agricultural products	5.8	8.0	25

Source: WTO Tariff Profiles (<http://stat.wto.org>)

Variable import tariffs are applied to sugar depending on the price quotations for sugar in the New York Mercantile Exchange (NYMEX). Higher tariffs are applied when prices drop below a certain level, providing a price support to domestic producers. In 2011 the import duty varied between 140 and 270 US\$/tonne based on a price band of 286.6-396.83 US\$/tonne.

#### *Tariff Rate Quotas*

Russia applies tariff rate quotas (TRQs) on beef, pork and poultry. These are the most sensitive sub-sectors in Russian agriculture and receive highest protection. Since 2005 the quotas on beef have gradually expanded, and the out-of quota tariffs increased from 40% to 50%. The quotas on poultry, on the other hand, have been tightened significantly over the past three years, decreasing from 1.2 million tonnes in 2008 to only 350 tonnes in 2011. Traditionally the quotas were allocated by exporting country by the authorities, but as of 2011 the country principle will not be applied, opening market opportunities for new suppliers (Kiselev and Romashkin).

**Table 6: Russia's Tariff Rate Quotas for meat in 2011**

	Tariff		TRQ
	In-quota rate	Out of quota rate	1000 tonnes
	%	%	
Beef fresh and chilled	15	50	30
Beef frozen	15	50	530
Pork fresh, chilled or frozen	15	75	472
Pork trimming	15	75	27.9
Poultry meat fresh, chilled or frozen	25	80	350

Source: OECD (2011)

### *Export restrictions*

Russia has emerged as one of the major exporters of grains, especially wheat and barley. Apart from interventions as buyer and seller in the market, the regulation of the grains market is primarily achieved through border measures. Following the dramatic drop in supplies in 2010 caused by the drought a ban on grain exports was introduced on 15 August 2010 covering wheat and wheat flour, barley, rye and maize. The ban lasted until 30 June 2011. Export restrictions include export duties that are applied on a small number of products, including soybeans, sunflower seeds, rape seeds and salmon, but not grains. The substantial decline in grain production in 2012 due to yet another drought has generated concerns that additional export bans may be introduced.

### **3. Recent agricultural policy developments**

Emergency assistance has been allocated to the agricultural sector in response to the global economic crisis in 2009 and the exceptionally severe drought in 2010, with 43 affected regions. The unprecedented high temperatures caused a major decline in grain production, reducing food availability and agricultural incomes. Exceptional measures in 2010 and 2011 included expansion of concessional loans and extension of loan repayment to provide financial relief to the sector, disaster payments to producers to compensate for crops losses and additional input subsidies, especially for purchases and transportation of animal feed. These measures were accompanied by border measures, most notably the export ban on grains. The focus on immediate measures to avoid supply disruptions and compensate producers for losses meant that public sector support has been redirected away from programs that foster longer-term development of the agricultural sector such as rural infrastructure and land improvement.

The State Programme for Development of Agriculture for 2008-12 has expired and the new State Programme for the period 2013-2020 was adopted in July 2012. Compared to the previous targets for 2013 (established in 2011), in the new State Program the federal budget

expenditure on agriculture is set to increase by 9.2% to 158.9 billion RUB<sup>4</sup> and foresees variable annual increases thereafter. The new programme establishes indicative targets for domestic production as the share in total utilization to be achieved by 2020 (99.7% for grains, 93.2% for sugar, 87.7% for vegetable oil, 98.7% for potatoes, 99.3% for meat and 90.2% for dairy) and places a stronger emphasis on the development of cattle farming and dairy production. Of the total federal budget for the eight years, 33.1% will be allocated to livestock development (with an additional 4.3% for meat production), 30.9% to crop production and the rest is divided among smaller sub-programs, including 83.7 billion RUB (5.5% of the total) specifically designated to support for smallholder farmers. Another priority area established by the State Program is soil improvements.

On the trade policy side, one of the most important events, apart from WTO accession, has been the launch of the Customs Union of Belarus, Kazakhstan, and Russia on January 1, 2010. Custom controls were abolished within the Customs Union space on July 1, 2011. The union is eventually expected to become a single economic area. The Eurasian Economic Commission for Europe was established to oversee its implementation.

#### **4. WTO Accession**

After a long process of negotiations, Russia officially joined the WTO on 22 August 2012, assuming commitments on market access, domestic support and export subsidies. On market access, the tariff schedule establishes gradual reduction or elimination of tariffs on a number of agricultural products, although the tariff rate quotas and high out-of-quota tariffs are maintained for meats. The simple average bound rate for agricultural goods is set at 10.8%, implying a decrease by 3.5 percent points from the applied average rate of 14.3%. Within the first three years of the accession tariffs will be reduced for most fruits (from 10% to 5%), tea (from 20% to 12.5%) as well as rice, milk, butter, most vegetables and fruit juices (from 15% to 10%).

One of the most difficult agreements to reach has been on tariff reductions for sensitive products such as live pigs and processed meat products. As the result of the negotiations, the Russian side agreed to reduce the tariff on live pigs from 40% to 5% upon accession, generating concerns among Russian pig producers who expect to operate at losses once the tariff is cut. For pork meat the within-quota tariff was negotiated to be set to zero (down from 15%), and the out-of-quota tariff to be reduced from 75% applied in 2011 to 65% at the time of accession and remaining unchanged until 2020 when it will be reduced to 25%.

For processed meat products, another sensitive product, the tariff is to be reduced from 25% before accession to 8% in 2015. No changes in tariff-rate quotas are foreseen for beef and

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<sup>4</sup> «Аналитическое распределение бюджетных ассигнований федерального бюджета по государственным программам Российской Федерации на 2011 год и на плановый период 2012 и 2013 годов»; «Государственная программа развития сельского хозяйства и регулирования рынков сельскохозяйственной продукции, сырья и продовольствия на 2013-2020 годы».

poultry: The quantities and tariffs are to be maintained at the level of 2011. If Russia decides to abandon the quota system, the ad-valorem tariffs will be 27.5% for beef, 25% for pork and 37.5% for poultry.

For sugar only the upper variable tariff rate will be reduced from 270 US\$/tonne to 250 US\$/tonne, but an important change is the significant adjustment of the price band downward from the previously applied range of 286.6-396.8 US\$/tonne. The new reference price for calculation of the import duty has the lower limit at US\$100/tonne and the upper limit at US\$198/tonne for raw sugar. Given the currently high level of prices well above US\$400/tonne, it is safe to assume that Russian import duties will remain at their lower level of 140 US\$/ton, which is still rather high, equivalent to over 30% in ad-valorem tariff.

Russia does not currently apply export subsidies and made the commitment to bind them at zero. Some export duties were reduced as the result of WTO accession, for example for soybeans the export taxes were reduced from 20% to zero and for sunflower seeds from 20% to 6.5%.

On domestic support, the commitments regarding trade-distorting subsidies in the “amber box”<sup>5</sup> as measured by the Aggregate Measurements of Support (AMS) are set at US\$9 billion in 2012 with a gradual decline to US\$4.4 billion by 2018, which corresponds to Russia’s annual average total AMS for the period 2006-2008. In 2008 the Total AMS stood at US\$5.65 billion out of which US\$5.60 billion was reported to be non-product specific (WTO, 2012). The largest component of the AMS was soft loans to agriculture with US\$1.6 billion.

The 2008 figures were the last circulated by the Delegation of the Russian Federation to the WTO. Although it is evident that the level of government support to agriculture increased in the subsequent years in response to the adverse shocks as described above, and in particular for provision of subsidized credit, the AMS commitments for 2012 and 2013 are likely to be well above the current level of domestic support, leaving room for possible increments under the new State Programme for 2013-2020. As such, the established level of commitments would not require Russia to reduce its trade-distorting subsidies until 5 or 6 years after the accession. However, it means that Russia is facing a limit on future expansion of distorting support.

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<sup>5</sup> According to WTO, all domestic support measures considered to distort production and trade (with some exceptions) fall into the so-called amber box. These include measures to support prices, or subsidies directly related to production quantities. The reduction commitments for these types of subsidies are expressed in terms of Total Aggregate Measurement of Support (Total AMS) ([http://www.wto.org/english/tratop\\_e/agric\\_e/agboxes\\_e.htm](http://www.wto.org/english/tratop_e/agric_e/agboxes_e.htm)). The AMS calculation of market price support is based on a fixed, historical world reference prices rather than current world prices.

## Total Russia's Total AMS commitments limiting domestic support to agriculture

	2012	2013	2014	2015	2016	2017	2018
Total AMS commitments US\$ bn	9.0	9.0	8.1	7.2	6.3	5.4	4.4

Source: WTO Schedule for Russian Federation

### 5. Concluding remarks

Russia's support to agriculture has been on a steady increase since 2000, in part reflecting the tendency to fill the gap in public policy towards the sector created by the collapse of state-controlled agrarian structures prevailing in the Soviet Union and the failure of state to address the restructuring challenges during the early stages of market reforms. In the wake of the food crisis in 2007-08, food security has emerged as a major priority area for the Russian Government and greater emphasis has been placed on import substitution, in particular in the livestock sub-sector.

Although the share of MPS in the total producer support has declined between 2008 and 2010, it is still the largest category of agricultural support constituting 59.3% of the PSE. Market price support is obtained largely by border protection. Together with subsidies based on input use, the second largest category, these amount to 93.9% of all producer support, implying that most of support to agriculture in Russia is classified as being trade distorting.

Soft lending for investments and government support to a wide range of inputs, including feed, energy and transport, are likely to continue as reflected in the State Program for 2013-2020. Agricultural risk management has emerged as a particular policy concerns in the recent years, since the consequences of the droughts in 2010 and 2012 for the grain sector have been severe. Grain intervention system will continue to receive policy attention. There are also indications that land improvements are a priority for 2013-2020.

The WTO accession generates a number of challenges, mostly related to market access for meat and meat products, but Russia is not facing an eminent obligation to lower domestic support as measured by AMS. The AMS commitments for the period 2012-15 are well above the current level of support. However, after 2015 adjustments will have to be made to maintain the level of domestic support and eventually reduce it to the average level in the 2006-08 period (US\$4.4 billion per year). The main challenge for the Russian Government with respect to WTO commitments on agriculture will be finding new ways to foster long-term growth and competitiveness of the sector through less trade-distorting types of measures consistent with the WTO obligations.

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