

RUSSIAN RAPESEED – EVOLUTION AND ECONOMIC PERSPECTIVES

Sergey Tuchin

General manager

Association of rapeseed producers and processors «RASRAPS», Moscow, Russia

PhD student at Russian institute of agrarian problems and informatics «VIAPI»,
Moscow, Russia

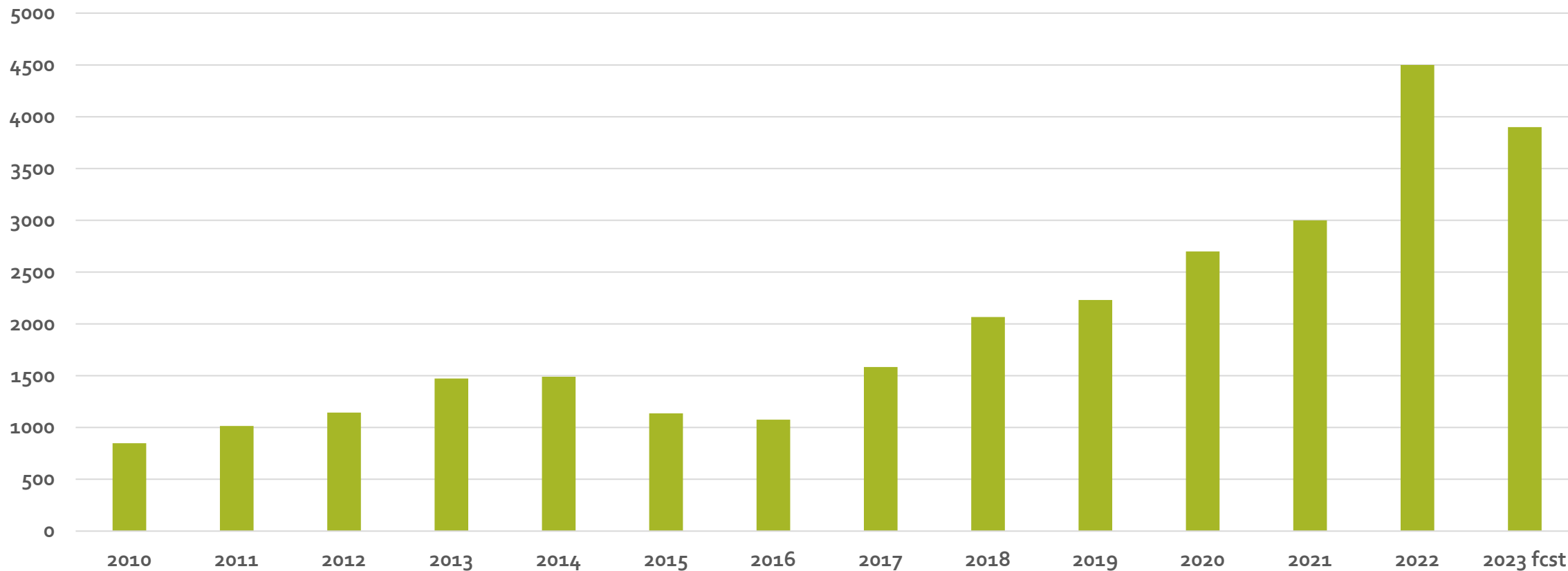
International Rapeseed Congress 2023
Sydney, Australia

25.09.2023

Contents:

- Evolution of oil seed rape production in Russia, 2010-2023;
- SOSR sowing acreage dynamics in Russia, 2009-2023;
- WOSR sowing acreage development in Russia, 2009-2023;
- Oil seed rape acreage and market development in Russia;
- Challenges in oil seed rape cultivation in Russia;
- Perspectives/Future of oil seed rape cultivation in Russia.

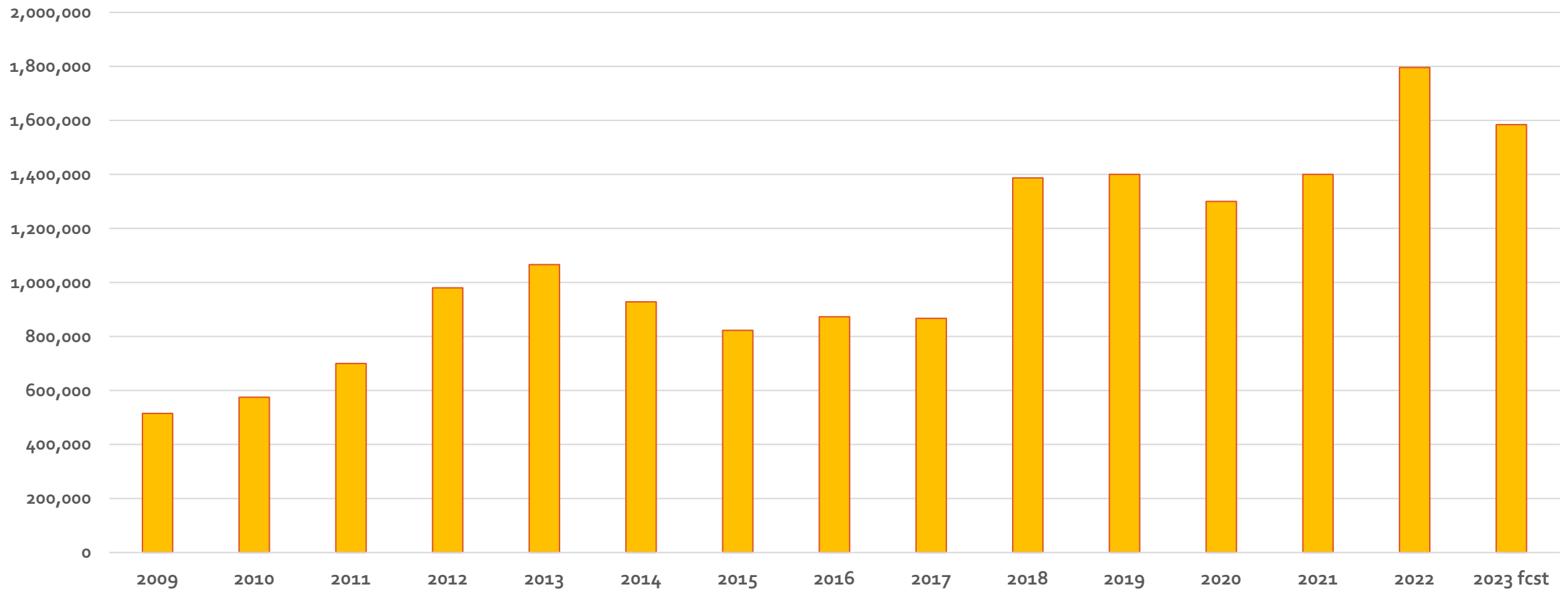
OSR production development in RF 2010-2023 fcst, K mt



Russia has obtained the historically record yield of rapeseed in 2022 - 4,5 Mln. tn that is 1,5 Mln. higher than in 2021.

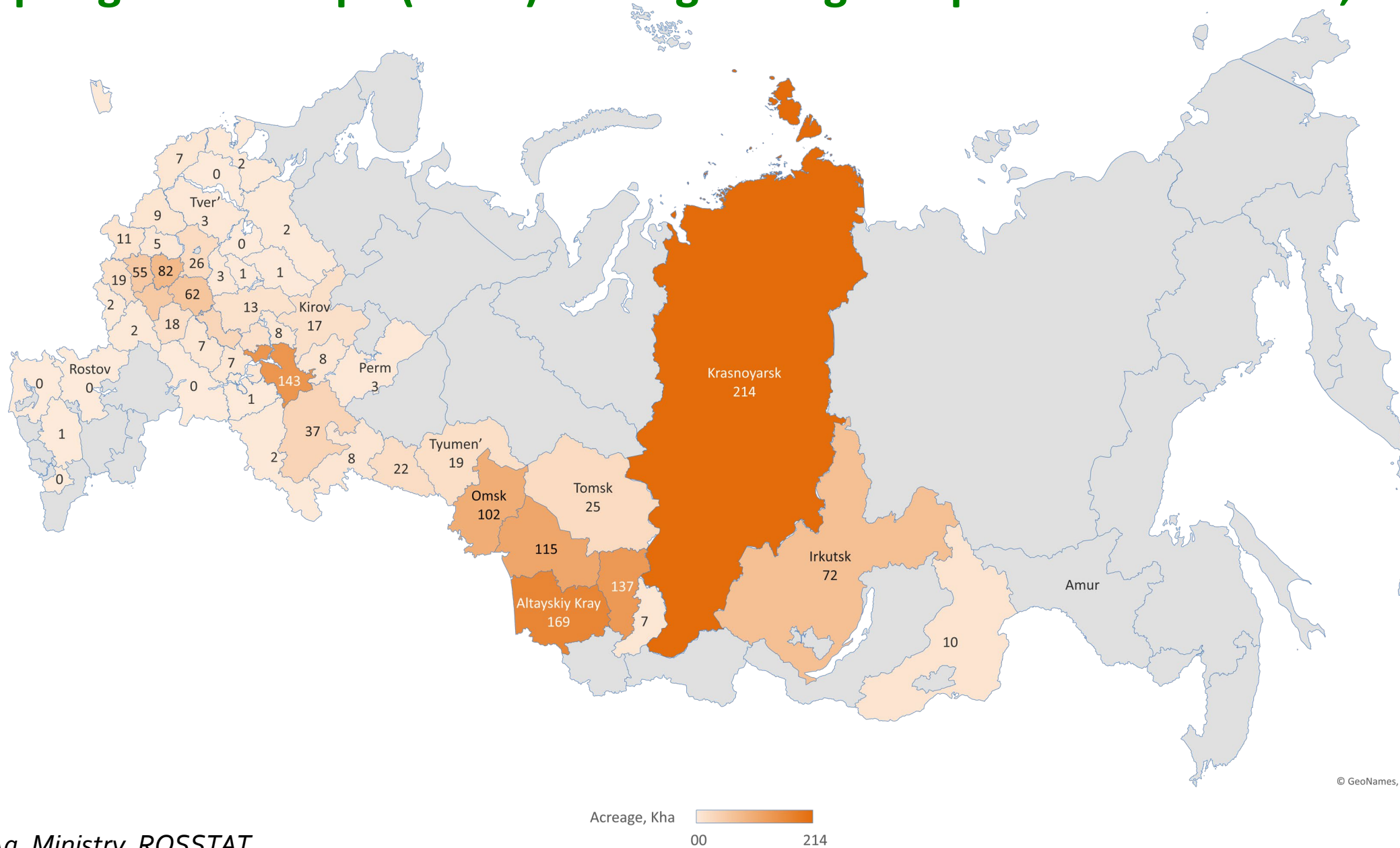
Source: Russian Ag. Ministry, ROSSTAT, Association RASRAPS

SOSR sowing acreage dynamics in RF 2009-2023 fcst, ha



SOSR sowing acreage has been increased almost in 3 times since 2009.

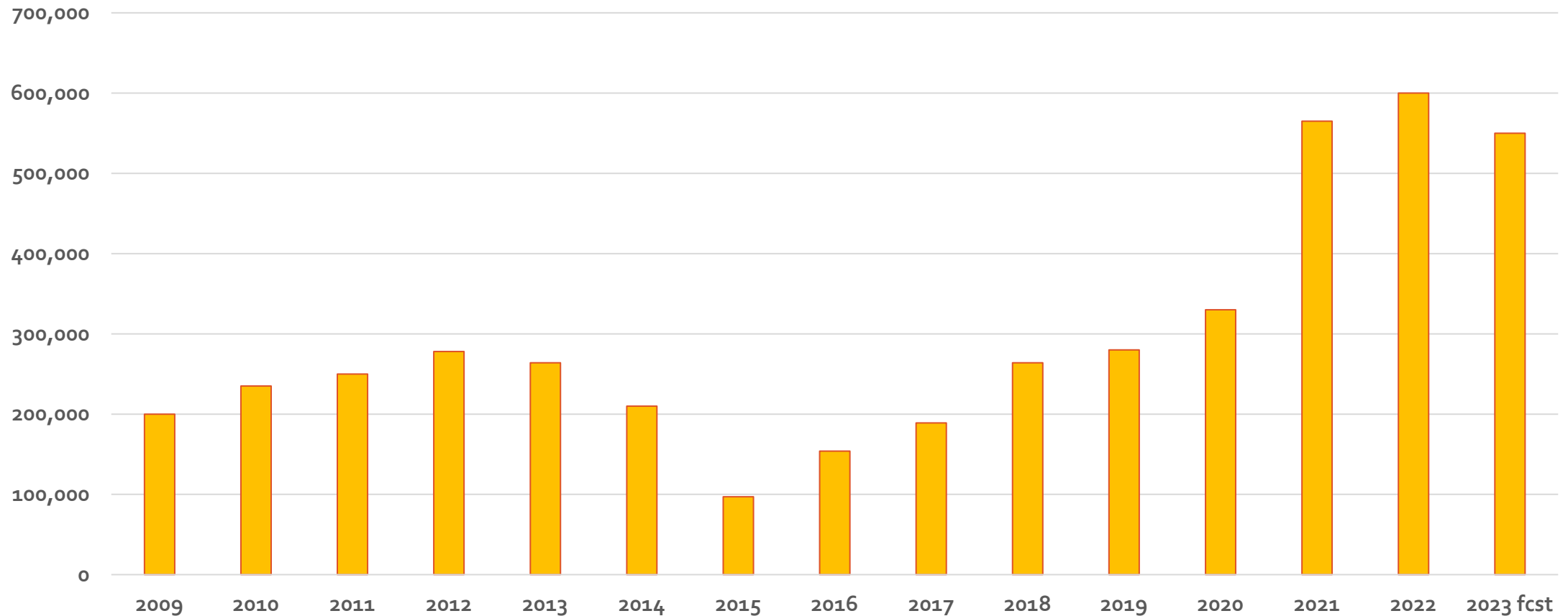
Spring oilseed rape (SOSR) sowing acreage map in RF in 2023 fcst, K ha



Source: Ag. Ministry, ROSSTAT

На платформе Bing
© GeoNames, HERE, MSFT, Microsoft, Wikipedia

WOSR sowing acreage development in RF 2009-2023 fcst, ha



Due to unpredictable weather conditions in autumn and winter, WOSR sowing acreage has not increased significantly within 10 years, but for recent 3 years the sowing acreage almost doubled and the main cultivation area has been moved from Southern to Central regions because of climate changing and crop rotation respectively.

OSR sowing acreage by Macro regions RF 2021 vs 2022, K ha

Macro region	Sowing acreage in 2021, K ha	Sowing acreage in 2022, K ha	2022 vs 2021	
			+/- K ha	%
Russian Federation	1626	2362	+736	145
Siberia	698	948	+250	136
Central	424	576	+152	136
Volga	257	303	+46	118
Northern-Caucasus	41	199	+158	483
Southern	66	151	+85	231
Northern-West	65	79	+14	122
Ural	54	86	+32	157
Far East	21	20	-1	93

Siberian region provides more than 40% from the total sowing acreage in 2021-22.

Source: Ag. Ministry, RASRAPS

Top 10 regions by OSR sowing acreage in RF 2021 vs 2022, K ha

TOP 10 OSR sowing acreage
in 2021, K ha

Region	K ha
Krasnoyarsk	138,9
Altay	136,2
Tatarstan	111,1
Stavropol	80,4
Novosibirsk	79,7
Omsk	77,5
Tula	71,8
Kemerovo	69,7
Ryazan	54,2
Lipetsk	53,7
Total	873,2

TOP 10 OSR sowing acreage
in 2022, K ha

Region	K ha
Krasnoyarsk	234,9
Altay	196,2
Novosibirsk	149,1
Tatarstan	142,9
Stavropol	137,1
Kemerovo	134,3
Omsk	109,3
Tula	104,2
Krasnodar	88,5
Orel	78,6
Total	1 375,1

Top 10 regions provide more than 50% from
the total sowing acreage.

Source: Ag. Ministry, RASRAPS

Challenges in oilseed rape cultivation in Russia

Main Challenges:

- average OSR yield rate is still only 1.6-1.8 tn/ha;
- low input technology in most regions of OSR cultivation areas;
- high share of Farm save seeds estimated for SOSR at 30%;

Environmental condition risks:

SOSR = early spring drought, tough sowing conditions, wet harvesting conditions.

WOSR = moisture deficiency during sowing period in south regions, severe winters in central regions and early spring frost damage.

Pests:

SOSR = insects pressure (*Plutella xylostella* / Diamondback), *Sclerotinia*, *Alternaria*

Perspectives/Future of oilseed rape cultivation in Russia

- Increasing processing capacity of local crushing plants will promote the commodity price growth;
- Rapeseed becomes a highly profitable crop which perfectly suits to cereals crop rotation;
- Constant export duty implementation for cereals motivate farmers to increase the share of OSR in its crop rotation as one of the most profitable crops;
- Rapeseed is export oriented oil crop which is mainly processed inside Russia (rapeseed oil goes to export; rapeseed meal is a good source of local cheap balanced protein for livestock);
- Export ban implementation till 29.02.2024 has a restriction for commodity rapeseed export sales.

Perspectives/Future of oilseed rape cultivation in Russia

- Huge acreage of abandoned land, especially in Northern-West and Siberia regions could be potentially return into a crop rotation with the support of Clearfield (imazamox) hybrids of spring and winter OSR
- Spring OSR, thanks to its cycle, is the only oilseed crop to be developed in northern west and east regions. The SOSR sowing acreage might be increased up to 3 Mln ha in the middle term perspective
- Winter OSR main cultivation area has moved from Southern region to Central and Northern-West because of rapid climatic conditions change. The WOSR sowing acreage might be increased up to 1 Mln ha in the middle term perspective
- So, the middle term production volume forecast might be increased up to 6-8 Mln. mt of oilseed rape in RF
- The side-product of processing oilseed rape (oil cake) is a perfect source of local protein, which is getting widely use by livestock enterprises to replace partly the soya bean cake in diary cattle feeding

A wide-angle photograph of a vast field of yellow rapeseed flowers in full bloom. The field stretches to the horizon under a clear, bright blue sky. The text "THANK YOU FOR YOUR ATTENTION !" is overlaid in the upper center of the image in a light green, sans-serif font.

THANK YOU FOR YOUR ATTENTION !