

BLUF Global food security may be impacted by notably low Russian grain export quotas. However, wheat production and exports remain within the range of previous years.

Change in Volume and Timing of Russian Wheat Exports May Drive Global Food Insecurity

- Russia is a major wheat producer and exporter (**Fig. 1**), with a 25% export market share in 2024. Since 2020, Russia has implemented export quotas for grain. Russia set the quota at 10.6 million metric tons for the second half of the 2024-25 grain trade year (Feb-Jun).
- The limit on Russian wheat exports until June may disrupt supply schedules for import-dependent countries. **A change in imports could force countries (Fig. 2) to seek costlier alternatives and pass on increased food prices to communities.**
- Food price spikes can contribute to unrest, as seen in the Arab Spring. Individual countries' outcomes depended partly on their government's efforts to safeguard food affordability and access.

Fig. 2: Vulnerability of Importers to Disruptions in Russian Wheat Exports
Countries with a higher proportion of Russian wheat imports are highly vulnerable to trade disruptions and may need to seek alternative sources if possible. Our calculations show 70% of Russian wheat exports were represented in the dataset based on 2023 values.

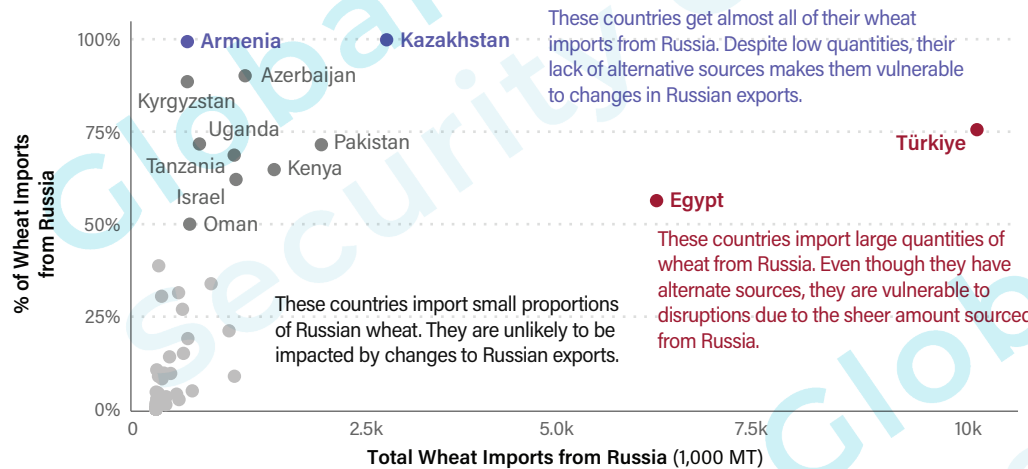
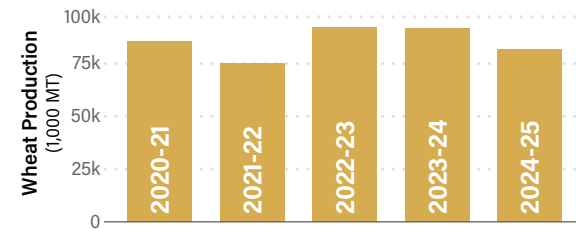


Fig. 1: Wheat Production (1a) and Exports (1b) are Within the Range of Previous Years

The supply (stocks and production) of wheat at the beginning of the trade season influences exports.

Fig. 1a

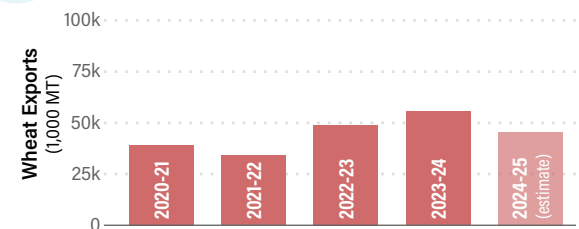


Russian wheat production fluctuates (**Fig. 1a**). The 2024-25 value is within the range of the previous 4 years. Because Russia is a major producer and exporter (25% share), small changes can have global impacts.

Domestic stocks and production influence exports. Other factors for exporter decision-making include global and domestic wheat prices, export costs, and demand.

Russian wheat exports vary annually (**Fig. 1b**). Exports for 2024-25 are projected to be higher than 2021-22, despite the low quota, due to early-season sales. The export quota prioritizes domestic affordability and consumption, which has remained steady (~40M metric tons).

Fig. 1b



Production



Domestic Consumption



Exports

Sources:

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Data Analysis Methods:

DATASETS: USDA FAS Market and Trade Data . Years: 2020 to 2025. Annual totals for stocks, production, imports, exports, and domestic consumption for the country of Russia.

CEPII BACI: International Trade Database at the Product-Level. January 2025 Version. Year: 2023. Annual total of wheat products exchanged in the global market. These data are self-reported and Russia does not report. The wheat reported by other countries as being exported by Russia accounted for 70% of the expected wheat exports.

CALCULATIONS:

Percent of Wheat Imports Coming from Russia: The sum of wheat imports that were exported from Russia divided by the total wheat imports to a given country multiplied by 100.

Change in Russian Wheat Stocks: Wheat stocks at the end of the marketing year (June) minus wheat stocks at the beginning of the marketing year (July).

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