



GIEWS Country Brief Belarus

Reference Date: 27-January-2023

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for 2023 winter cereals
- Above-average cereal production estimated in 2022
- Import requirements forecast slightly below average in 2022/23
- Prices of wheat flour higher than year earlier
- Gross domestic product (GDP) growth contracted 7 percent in 2022

Favourable weather conditions for 2023 winter cereals

Sowing of the 2023 winter cereal crops, mainly wheat and triticale, took place between mid-September and early October 2022 under overall favourable weather conditions. Crops are currently in winter dormancy phase. As of late December 2022, snow coverage was reported to be sufficient to protect crops from frosts and to secure good moisture reserves in early spring 2023 (March-April), when plant growth resumes. The harvest of winter crops is expected to begin in mid-July 2023.

Above-average cereal production estimated in 2022

Harvesting of the 2022 winter and spring cereal crops finalized last August and last November, respectively. The aggregate 2022 cereal production is estimated at about 7.8 million tonnes, 8 percent above the average. According to preliminary official data, the output of wheat, maize and cereals NES (mainly triticale) is set at 2.5 million tonnes, 1.5 million tonnes and 1.4 million tonnes, respectively, above the average levels due to large plantings and adequate and well-distributed rainfall during the season. By contrast, the output of barley is estimated slightly below the average level, at 1.1 million tonnes, due to reduced plantings.

Import requirements forecast slightly below average in 2022/23

In the 2022/23 marketing year (July/June), total cereal import requirements are forecast at about 557 000 tonnes, 7 percent below the five-year average volume. Wheat and maize import requirements are forecast at 250 000 tonnes and 120 000 tonnes, respectively, below the average levels due to the bumper production harvested in 2022. Barley import requirements are

Belarus

Crop Calendar

(*major foodcrop)

Wheat* (Winter)

Maize* (Spring)

Barley (Spring)



Sowing

Growing

Harvesting

Belarus

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Wheat	2 407	2 441	2 500	2.4
Maize	1 030	1 148	1 500	30.7
Barley	1 183	1 077	1 100	2.1
Others (incl.cereals NES)	2 489	2 225	2 656	19.4
Total	7 109	6 891	7 756	12.6

Note: Percentage change calculated from unrounded data.

forecast at a slightly above-average level of 130 000 tonnes.

On 23 September 2022, the Council of ministers adopted Resolution 636, providing for a new six-month extension to the ban on exports of wheat and meslin, barley, maize rye, oats, buckwheat, millet, sunflower seeds and rapeseeds that was introduced in August 2021 for an initial period of six months and then extended in March 2022 ([FPMA Food Policy](#)).

Prices of wheat flour higher than year earlier

The national average retail prices of wheat flour remained generally stable between May 2019 and March 2022. From April to August 2022, prices increased sharply, amid the adoption on 7 April of [Resolution 214](#), which partially relaxed the controls on wheat flour prices that were in place since February 2021. Prices of wheat flour declined afterwards, by about 4 percent until November 2022, but remained well above the values recorded a year before due to increases in costs of production and transport.

The national average retail prices of potatoes, another food staple in the country, seasonally declined between July and November 2022, following the harvest of the new tubers. Last November, prices were well below their levels in the corresponding month a year before, due to the abundant output harvested in 2022.

GDP growth contracted by 7 percent in 2022

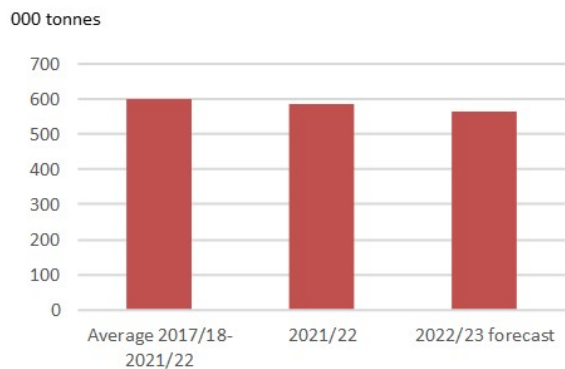
Based on estimates of the International Monetary Fund, the GDP growth contracted by about 7 percent in 2022. This is due to the introduction of international sanctions against the country following the start of the war in Ukraine, which depressed the domestic demand for goods and services, and hampered exports. Sanctions have targeted the country's highest foreign currency-earning products, including crude oil and potash fertilizers and, according to the World Bank, it has caused an estimated loss of about one-third of export revenues.

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This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.
FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.
Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

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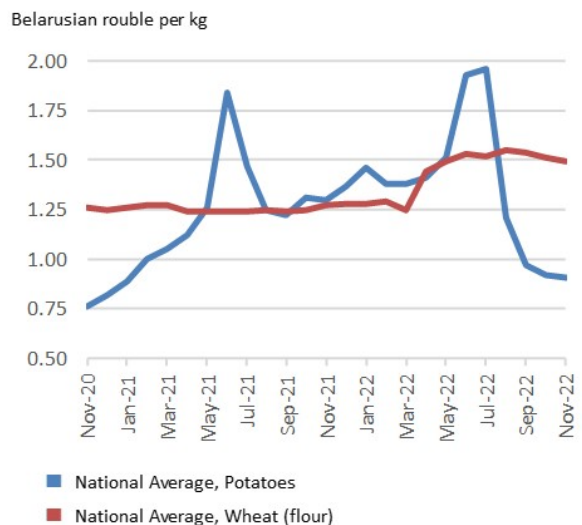
Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Belarus

Selected retail prices





GIEWS Country Brief Belarus

Reference Date: 21-June-2022

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for 2022 winter cereals
- Slightly above-average cereal production obtained in 2021
- Import requirements forecast above average in 2021/22
- Prices of wheat flour increased sharply in April 2022

Favourable weather conditions for 2022 winter cereals

Sowing of the 2022 winter cereal crops, mainly wheat and triticale, finalized in early October 2021 and the harvest is expected to start from mid-July. Weather conditions have been overall conducive during the season and, according to satellite-based images, vegetation conditions were favourable across the country in May (VHI map).

Planting of the 2022 spring cereals, mainly barley and maize, finalized in May and crops will be harvested from mid-July.

Slightly above-average cereal production obtained in 2021

Harvesting of the 2021 winter and spring cereal crops finalized last August and last November, respectively. The aggregate 2021 cereal production is estimated at a slightly above-average level of 7.3 million tonnes. The output of wheat is officially set at 2.5 million tonnes, 6 percent above the average level following adequate and well-distributed rainfall during the season. Maize production is estimated at a well above-average level of 1.4 million tonnes due to large plantings and overall favourable weather conditions during the season. By contrast, the aggregate output of cereals NES (mainly triticale) and barley is estimated slightly at a below-average level of 2.3 million tonnes, mostly due to reduced plantings.

Import requirements forecast slightly above average in 2021/22

In the 2021/22 marketing year (July/June), total cereal import requirements are forecast at about 570 000 tonnes, about 6 percent above the five-year average volume. Maize import requirements are forecast at 60 000 tonnes, well below the average level due to the large output harvested in 2021.

Belarus

Crop Calendar

(*major foodcrop)

Wheat* (Winter)

Maize* (Spring)

Barley (Spring)



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Belarus - Vegetation Condition Index (VHI)

May 2022



Source: FAO/GIEWS Earth Observation System.

Belarus

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	2 324	2 848	2 533	-11.1
Maize	1 102	1 076	1 400	30.1
Barley	1 139	1 375	1 119	-18.6
Others	2 484	3 083	2 292	-25.7
Total	7 049	8 382	7 344	-12.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Similarly, barley import requirements are forecast at a below-average level of 100 000 tonnes, while wheat imports are forecast at an above-average level of 350 000 tonnes.

On 11 March 2022, the government adopted [Resolution 125](#), providing for a six-month extension of the existing temporary ban on exports of wheat and meslin, rye, barley, oats, maize, buckwheat, millet, triticale and other cereals, as well as rapeseed, sunflower seeds and other products ([FPMA Policy](#)). The ban was introduced on 26 August 2021, for an initial period of six months. On 31 May 2022, the government amended Resolution 125 through the adoption of [Resolution 353](#), adding other products to the list, mostly animal feed.

Prices of wheat flour increased sharply in April

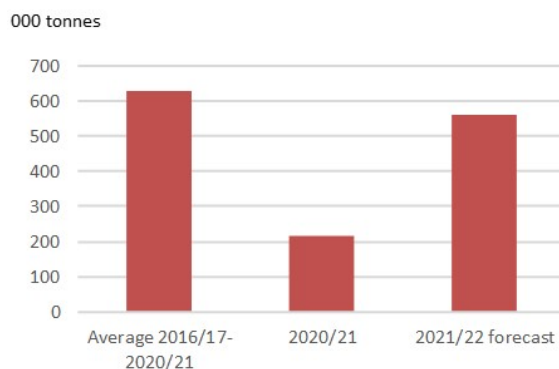
Retail prices of wheat flour remained generally stable between May 2019 and March 2022. In April, prices increased sharply, amid the adoption on 7 April 2022 of [Resolution 214](#), which partially relaxed the controls on wheat flour prices that were in place since February 2021. Prices reached levels well above those of a year before amid very high wheat export quotations in the Russian Federation, the main wheat supplier to the country, and the depreciation of the national currency, which lost about 30 percent of its value against the United States dollar compared to April 2021.

The national average retail prices of potatoes, another food staple in the country, showed an increasing trend between September 2021 and January 2022, in line with seasonal patterns. Prices declined in February and remained quite stable in March and April. Prices reached levels 26 percent higher year on year, amid the harvest of a reduced output in 2021.

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Belarus

Cereals Imports

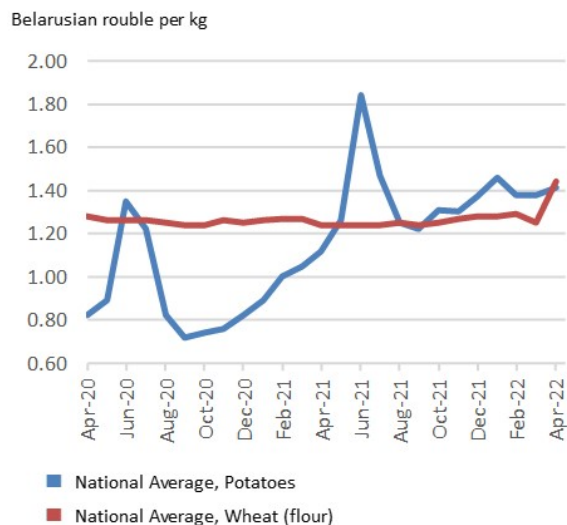


Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Belarus

Reference Date: 04-October-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2021 forecast at above-average level due to favourable weather conditions and large maize plantings
- Import requirements forecast below average in 2021/22
- Prices of wheat flour stable and near year-ago levels

Cereal production in 2021 forecast above average due to favourable weather and large maize plantings

Harvesting of the 2021 winter crops, mainly wheat and triticale, finalized in August. As for spring cereals, harvesting of the 2021 maize crop is ongoing under favourable weather conditions while the barley crop was collected in August and September.

The aggregate 2021 cereal production, including an early forecast of the output of spring crops to be harvested until mid-November, is set at 7.7 million tonnes, 8 percent above the five-year average level. The output of wheat is estimated at 2.4 million tonnes, near the average level, as adequate and well distributed rainfall during the season resulted in good vegetation conditions (ASI map as of end-June, just before the harvest). Similarly, production of cereals NES (mainly triticale) is set at a near-average level of 1.4 million tonnes. Maize production is forecast at 1.6 million tonnes, well above the average level due to large plantings and overall favourable weather conditions during the season. By contrast, barley output is expected at about 1.1 million tonnes, 10 percent below average due to a reduction in the area sown.

Planting of 2022 winter cereals (mainly wheat), to be harvested from early July next year, started in mid-September.

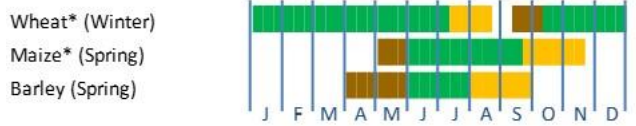
Import requirements forecast below average in 2021/22

In the 2021/22 marketing year (July/June), total cereal import requirements are forecast at 485 000 tonnes, about 8 percent below the five-year average volume. Maize import requirements are forecast at 100 000 tonnes, well below the average volume due to the harvest of a large output expected in 2021. Wheat and barley import requirements are forecast at a near-average level of 200 000 tonnes and 125 000 tonnes, respectively.

Belarus

Crop Calendar

(*major foodcrop)



- Sowing
- Growing
- Harvesting

Source: FAO/GIEWS.

Belarus - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, June 2021



Source: FAO/GIEWS Earth Observation System.

Belarus

Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
	000 tonnes			percent
Wheat	2 386	2 848	2 400	-15.7
Maize	953	1 100	1 600	45.5
Barley	1 218	1 375	1 080	-21.5
Others	2 590	3 069	2 657	-13.4
Total	7 147	8 392	7 737	-7.8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

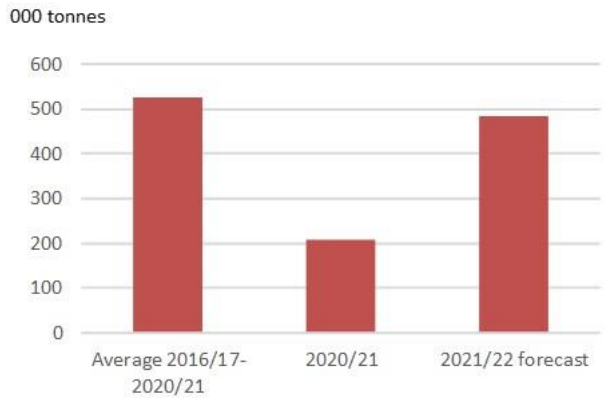
Prices of wheat flour stable and near year-ago levels

Retail prices of wheat flour have been overall stable since May 2019 and, in August 2021, they were near their levels a year ago.

Prices of potatoes, another food staple in the country, seasonally increased between September 2020 and June 2021, and declined during the following two months, with the arrival of the newly harvested tubers to the markets. In August 2021, prices were well above their levels in the corresponding month a year before due to the production of a year-on-year smaller output.

Belarus

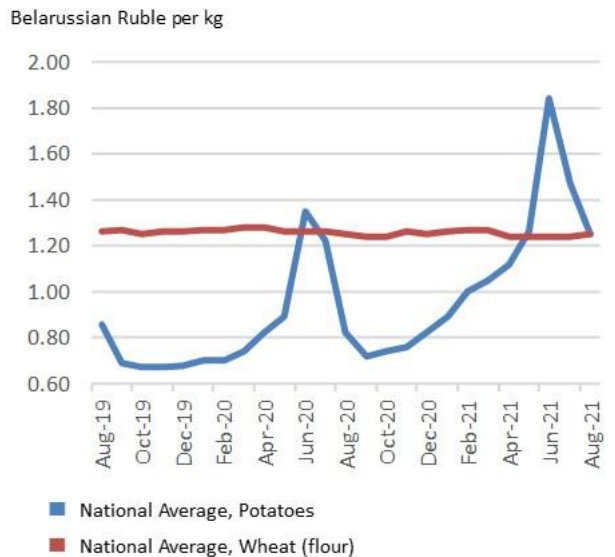
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Belarus

Reference Date: 24-May-2021

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for 2021 winter cereals
- Above-average cereal output obtained in 2020
- Import requirements forecast below average in 2020/21
- Prices of wheat flour stable and near levels of year before

Favourable weather conditions for 2021 winter cereals

Sowing of the 2021 winter cereals took place last October and crops are expected to be harvested from July. Weather conditions have been overall favourable during the season, resulting in near-average vegetation conditions as of early May (see ASI map).

Planting of the 2021 spring cereals, mainly barley and maize, is ongoing under overall beneficial weather conditions and crops will be harvested between August and November.

Above-average cereal output obtained in 2020

Harvesting of the 2020 cereal crops was completed last November and the aggregate production is estimated at 8.4 million tonnes, almost 20 percent above the five-year average level. The output of wheat is officially estimated at about 2.8 million tonnes, 18 percent above average due to large plantings and favourable weather conditions during the season, which boosted yields. The 2020 maize output is set at 1.1 million tonnes, well above the average level due to a large area planted. Production of cereals NES (mainly triticale) and barley is set at near-average levels of about 1.6 million tonnes and 1.4 million tonnes, respectively.

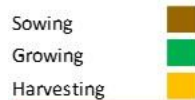
Import requirements forecast below average in 2020/21

In the 2020/21 marketing year (July/June), total cereal import requirements are forecast at 388 000 tonnes, about 20 percent below the five-year average volume. Wheat and maize import requirements are forecast at 150 000 tonnes and 50 000 tonnes, respectively, well below the average volumes due to the harvest of large outputs in 2020. By contrast, barley import requirements are forecast at an above-average level of 150 000 tonnes, to

Belarus

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Belarus - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, May 2021



Source: FAO/GIEWS Earth Observation System.

account for the low level of stocks following the reduced domestic outputs obtained in 2018 and 2019.

Prices of wheat flour stable and near levels of year before

Retail prices of wheat flour have been overall stable since May 2019 and, in March 2021, they were close to their levels a year before.

Prices of potatoes, another food staple in the country, seasonally increased between September 2020 and March 2021, reaching levels well above those in the corresponding month a year before due to the harvest of a year-on-year smaller output.

Belarus

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	2 396	2 309	2 848	23.3
Cereals NES	1 520	1 328	1 560	17.5
Barley	1 313	1 098	1 375	25.2
Others	1 873	2 235	2 609	16.7
Total	7 102	6 970	8 392	20.4

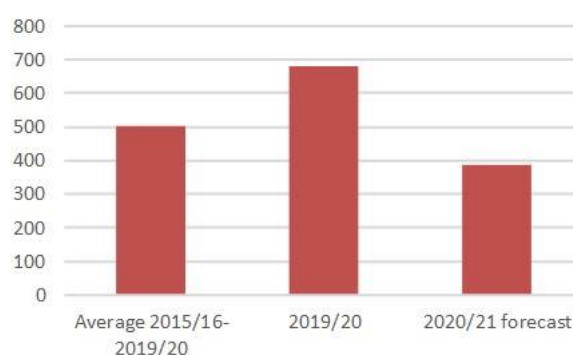
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Belarus

Cereals Imports

000 tonnes



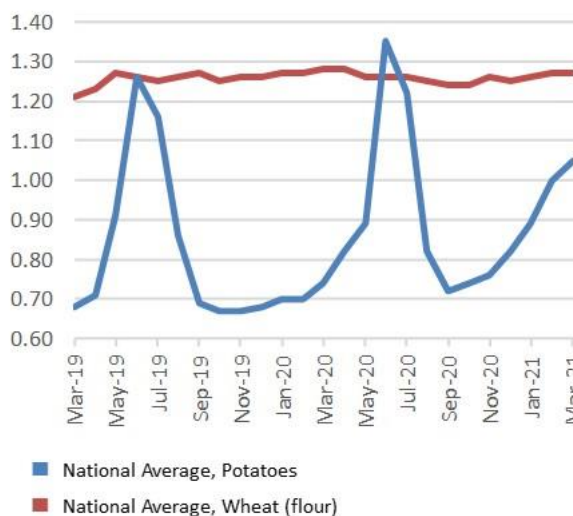
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices

Belarussian Ruble per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Belarus

Reference Date: 21-December-2020

FOOD SECURITY SNAPSHOT

- Near-average cereal output obtained in 2020
- Import requirements forecast above-average in 2020/21
- Prices of wheat flour stable and near levels of year before

Near-average cereal output obtained in 2020

Harvesting of the 2020 winter cereals (mainly wheat and barley) was completed in September, while harvesting of maize crops finalized in early December. The aggregate 2020 cereal production is estimated at a near-average level of about 7 million tonnes. The outputs of wheat and barley are estimated at 2.2 million tonnes and 1.2 million tonnes, respectively, about 10 percent below the five-year average levels mainly due to below-average plantings. Production of cereals NES (mainly triticale) is estimated at a near-average level of 1.5 million tonnes, while maize output is set at 1.1 million tonnes, well above average due to a large area planted.

Sowing of the 2021 winter cereals took place in October under overall favourable weather conditions and crops are expected to be harvested from July next year. Crop conditions were reported to be favourable as of early December.

Import requirements forecast above-average in 2020/21

In the 2020/21 marketing year (July/June), total cereal import requirements are forecast at 575 000 tonnes, about 15 percent above the five-year average. Wheat and barley import requirements are forecast at 250 000 tonnes and 150 000 tonnes, respectively, well above the average volumes to account for the low level of stocks following the reduced domestic outputs obtained in the last three years. By contrast, maize import requirements are forecast at a below-average level of 100 000 tonnes, amid the harvest of a favourable output in 2020.

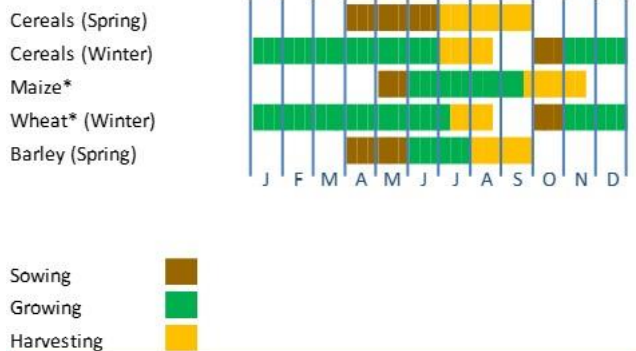
Prices of wheat flour stable and near levels of year before

Retail prices of wheat flour remained overall stable since May 2019 and, in October 2020, they were close to their levels a year before.

Belarus

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Belarus

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	2 396	2 309	2 200	-4.7
Cereals NES	1 520	1 328	1 500	13.0
Barley	1 313	1 098	1 150	4.7
Maize	778	1 093	1 100	0.6
Others	1 095	1 142	1 003	-12.2
Total	7 102	6 970	6 953	-0.2

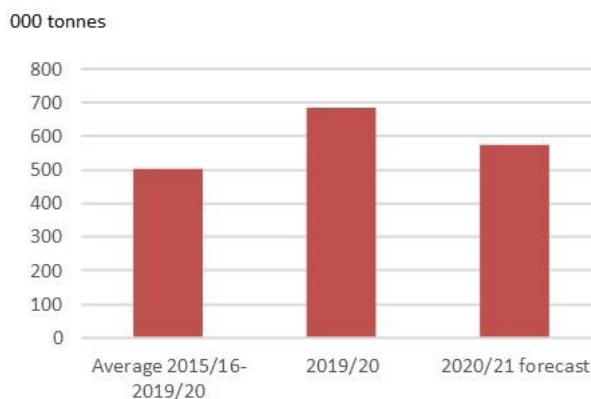
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of potatoes, another food staple in the country, increased between February and June 2020, with seasonal trends exacerbated by strong demand from consumers amid concerns over the COVID-19 pandemic. Prices seasonally declined from July to September 2020, due to increased market availabilities following the harvest of the 2020 tubers, and increased slightly in October, reaching levels about 10 percent above those in the corresponding month in 2019.

Belarus

Cereals Imports

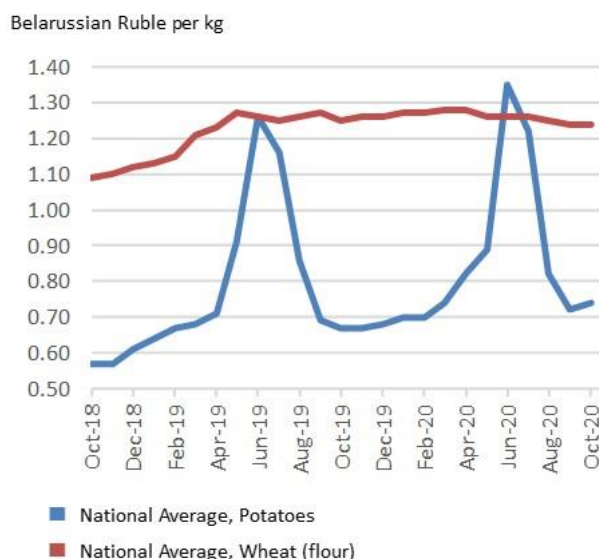


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Belarus

Reference Date: 11-August-2020

FOOD SECURITY SNAPSHOT

- **Below-average wheat output expected in 2020**
- **Import requirements forecast above average in 2020/21**
- **Prices of wheat flour stable in first six months of 2020**

Below-average wheat output expected in 2020

Harvesting of the 2020 wheat crop, which started in early July, is ongoing under favourable weather conditions. Precipitation during the season was adequate and well distributed in most croplands, except for some areas in the southeastern Gomel Region (that contributes on average to 15 percent of the total annual cereal production). In these areas, below-average rain levels between October and November 2019 and between March and April 2020 resulted in soil moisture stress, as shown by the Agricultural Stress Index (ASI) values in late June, just before the beginning of the wheat harvest (see ASI image).

Mainly due to below-average plantings, the 2020 output of wheat is forecast at 2.2 million tonnes, 8 percent below the five-year average.

Harvesting of barley started in early August, while harvesting of maize is expected to begin in late September and crop conditions are reported to be good, amid overall adequate soil moisture levels.

Import requirements forecast above average in 2020/21

In the 2020/21 marketing year (July/June), total cereal import requirements are forecast at 665 000 tonnes, about 30 percent above the five-year average. Wheat imports are forecast at 300 000 tonnes, well above the average to account for the low level of stocks following the reduced domestic wheat production obtained in the last two years and due to the expectation of a below-average output in 2020.

In response to the COVID-19 pandemic, and in order to ensure adequate domestic supplies, the Government issued a Decree, on 31 March 2020, imposing a three-month export ban on a number of staple foods, including buckwheat, buckwheat groats, onions and garlic.

Belarus

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Belarus - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, June 2020



Source: FAO/GIEWS Earth Observation System.

Prices of wheat flour stable in first six months of 2020

Retail prices of wheat flour remained overall stable in the first six months of 2020 and, in June, prices were close to their levels a year before.

Prices of potatoes, another food staple in the country, seasonally increased between February and June 2020, ahead of the harvest. Strong consumer demand amid concerns over the COVID-19 pandemic exacerbated the seasonal trends and prices in June reached levels 7 percent above those a year before.

Belarus

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Wheat	2 396	2 309	2 200	-4.7
Cereals NES	1 520	1 328	1 500	13.0
Barley	1 313	1 098	1 000	-8.9
Others	1 873	2 235	2 203	-1.4
Total	7 102	6 970	6 903	-1.0

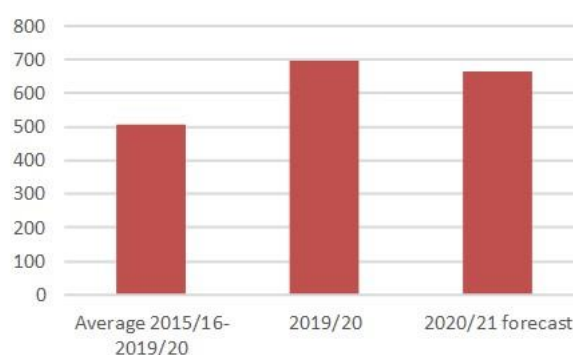
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Belarus

Cereals Imports

000 tonnes



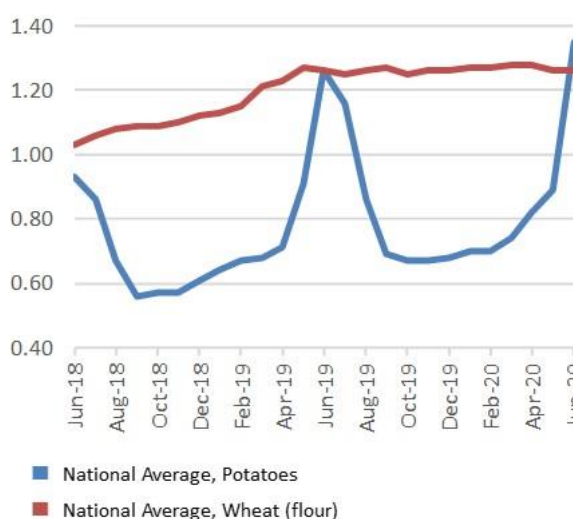
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices

Belarussian Ruble per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Belarus

Reference Date: 21-May-2020

FOOD SECURITY SNAPSHOT

- Below-average vegetation conditions in southern regions
- Above-average production of cereals estimated in 2019
- Import requirements forecast above-average level in 2019/20
- Prices of wheat flour remained stable in March

Below-average vegetation conditions in southern regions

Planting of the 2020 spring crops is ongoing under overall favourable weather conditions, while harvesting of the 2020 winter cereals, planted in September and October last year, is expected to take place from July.

According to satellite-based imagery, vegetation conditions at the end of April were near the average level in most central and northern croplands. By contrast, reduced precipitations between October and November 2019 and between March and April 2020 affected crop conditions in southern regions, particularly in the southeastern Gomel Region that contributes on average to 15 percent of the total annual cereal production (see NDVI anomaly map).

Above-average production of cereals estimated in 2019

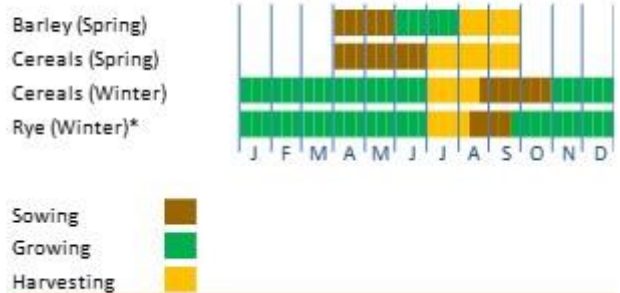
Harvesting of the 2019 cereal crops was completed in August last year and the aggregate output is estimated at 8.3 million tonnes, 10 percent above the average level. The outputs of wheat and maize in 2019 are estimated at 2.8 and 1.3 million tonnes, respectively, well above the 2018 low levels and the five-year average values due to large plantings. Barley output is estimated at a near-average level of 1.5 million tonnes, while production of buckwheat and triticale (cereals NES) is set at slightly a below-average level of 1.6 million tonnes.

Import requirements forecast above-average level in 2019/20

In the 2019/20 marketing year (July/June), total cereal import requirements are forecast at 620 000 tonnes, about 35 percent below the previous year's high level, but still well above the average. Wheat imports are forecast at 300 000 tonnes, a well

Belarus

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Belarus - NDVI anomaly

Relative difference to LTA, Dekad 3 April 2020



Source: FAO/GIEWS Earth Observation System.

Belarus

Cereal Production

	2014-2018	2018	2019	change
	average			
000 tonnes				
Wheat	2 519	1 815	2 800	54.3
Cereals NES	1 670	1 033	1 550	50.0
Barley	1 491	944	1 500	58.9
Others	1 826	2 003	2 420	20.8
Total	7 506	5 795	8 270	42.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

above-average volume for the second consecutive year, to account for the low level of stocks following the reduced domestic wheat production obtained in 2018.

Prices of wheat flour remained stable in March

Between October 2019 and March 2020, retail prices of wheat flour remained stable or slightly increased in line with seasonal trends. Similarly, prices of potatoes, another important staple in the local diet, remained stable or seasonally increased between November and March.

COVID-19 and measures adopted by the Government

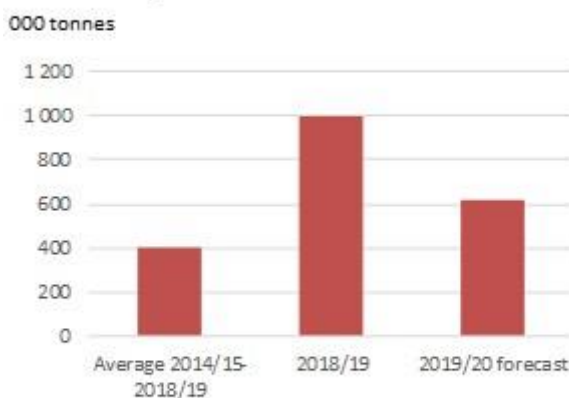
In response to the COVID-19 pandemic, the Government has taken a number of measures. These measures include the screening of all citizens arriving from abroad, imposing them to self-isolation and travel prohibition for 14 days; the imposition of quarantine to all infected people; the limitation of mass cultural, sports and scientific events and the closure of universities (which continue to provide lessons online).

On 31 March 2020, the Government issued a Decree imposing a three-month export ban on a number of staple foods, including buckwheat, buckwheat groats, onions and garlic.

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Belarus

Cereals Imports

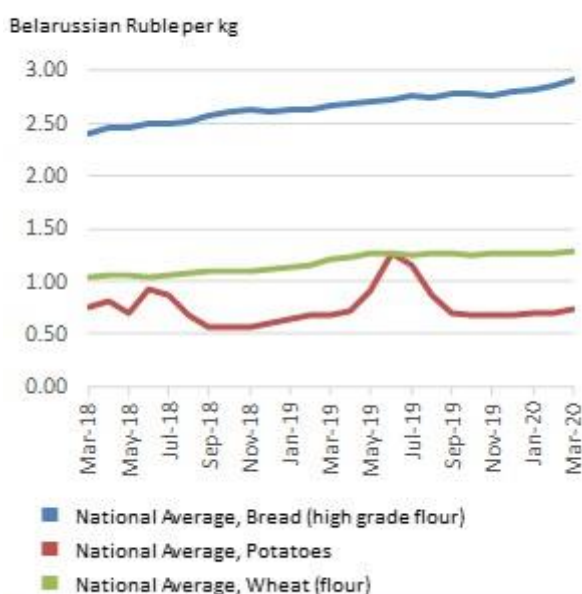


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Belarus

Reference Date: 16-October-2019

FOOD SECURITY SNAPSHOT

- Above-average production of cereals forecast in 2019
- Import requirements forecast above average in 2019/20
- Prices of wheat flour increased slightly in August

Above-average production of cereals forecast in 2019

Harvesting of the 2019 winter cereals (mainly wheat and barley) was completed by mid-August, while maize crops are currently being harvested under favourable weather conditions.

The aggregate 2019 cereal production, which includes maize crops to be harvested until late October, is forecast at the average level of 7.6 million tonnes. The 2019 output of wheat is estimated at 2.8 million tonnes, 55 percent above the 2018 low output and 10 percent above the five-year average due to large plantings and favourable weather conditions during the season. By contrast, maize production is forecast at 580 000 tonnes, 15 percent below the five-year average due to localized rainfall deficits and warmer-than-average temperatures in July in the key cereal producing regions of Grodno and Brest, which negatively affected yields.

Sowing of the 2020 winter cereals is ongoing under favourable weather conditions and is expected to finalize by the end of October. Planting intentions are officially estimated at above-average 1.3 million hectares.

Import requirements forecast above average in 2019/20

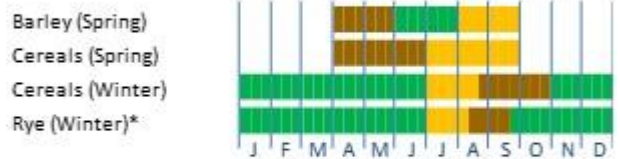
In the 2019/20 marketing year (July/June), total cereal import requirements are forecast at 620 000 tonnes, about 35 percent below the previous year's high level but still well above the average.

Wheat grain and wheat flour purchases are forecast at 300 000 tonnes, a well above-average volume for the second consecutive year, to account for the low level of stocks following the reduced domestic wheat production obtained in 2018 and amid low export prices from the Russian Federation, the main wheat supplier to the country.

Belarus

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Belarus

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	2 519	1 815	2 800	54.3
Cereals NES	1 670	1 033	1 550	50.0
Barley	1 491	944	1 500	58.9
Others	1 826	2 003	1 700	-15.1
Total	7 506	5 795	7 550	30.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Similarly, maize import requirements in 2019/20 are forecast at 140 000 tonnes, well above the five-year average volume, in order to compensate the expected reduced domestic output.

Prices of wheat flour increased slightly in August

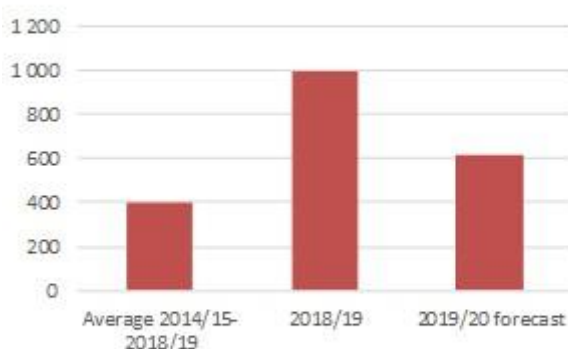
Retail prices of wheat flour, after increasing in May 2019, declined in the following two months and seasonally rose, although slightly, in August.

Prices of potatoes, another important staple in the country, rose between April and June 2019, in line with the seasonal trends and decreased afterwards with the new supplies from the 2019 harvest boosting market availabilities.

Belarus

Cereals Imports

000 tonnes



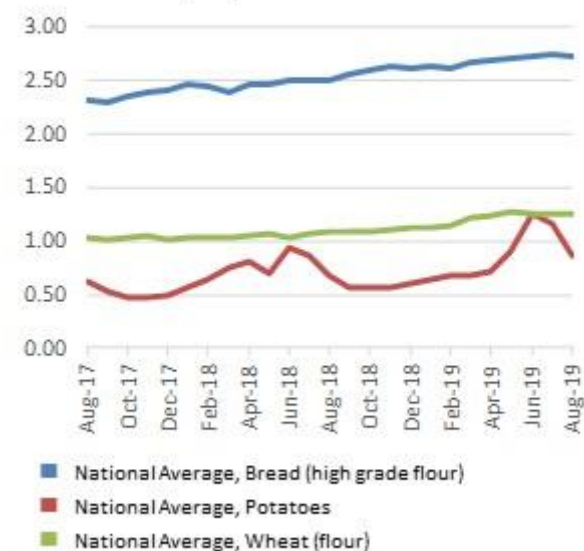
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices

Belarussian Ruble per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Belarus

Reference Date: 26-March-2019

FOOD SECURITY SNAPSHOT

- Despite localized rotting, conditions of 2019 winter crops overall favourable
- Total 2018 cereal production estimated below average
- Increased imports forecast in 2018/19
- Prices of wheat products virtually unchanged in January

Despite localized rotting, conditions of 2019 winter crops overall favourable

Conditions of 2019 winter cereals, planted between August and October 2018 and to be harvested from July, are overall favourable. However, as of early March, in the northeastern provinces, winter crops were weakened by the prolonged presence of snow cover on slightly frozen soil and rotting out of plants was observed in some fields. On the contrary, weather conditions are mostly favourable in southwestern provinces, where snow has already melted and crops' growth will soon resume.

In the southern Brest Province, favourable weather conditions made it possible for farmers to start planting spring grains in early March, almost one month earlier than usual.

Total 2018 cereal production estimated below average

Harvesting of 2018 cereals finalized by the end of September and the aggregate output is estimated at 7 million tonnes, below the five-year average and the year earlier level due to unfavourable weather conditions. In key producing provinces of Brest and Minsk, below average precipitation in May and June 2018 negatively affected soil moisture, followed by excessive rains that hampered harvesting operations. As a consequence, wheat output is estimated at 2.4 million tonnes, 7 percent below the average level. On the contrary, barley production is estimated slightly above the five-year average, mainly on account of an increase in the area planted.

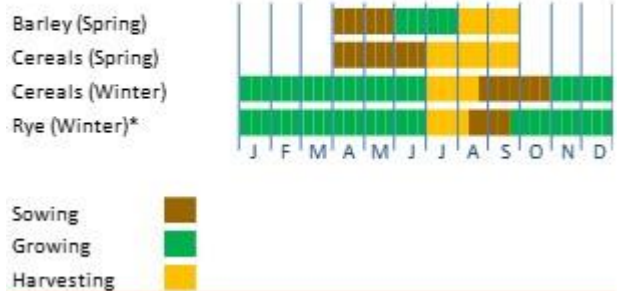
Increased imports forecast in 2018/19

In the 2018/19 marketing year (July/June), total cereal import requirements are forecast at 620 000 tonnes, 15 percent above the previous year and 60 percent above the average level. Due to lower quantity and quality of domestic production of wheat,

Belarus

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Belarus

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	2 577	2 620	2 400	-8.4
Cereals NES	1 724	1 625	1 450	-10.8
Barley	1 637	1 420	1 650	16.2
Others	1 854	1 842	1 540	-16.4
Total	7 790	7 507	7 040	-6.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

shipments of milling quality wheat are forecast above the previous year's above-average level, at 280 000 tonnes. Similarly, maize and barley import requirements are forecast well above average, at 150 000 and 100 000 tonnes, respectively.

Prices of wheat products virtually unchanged in January

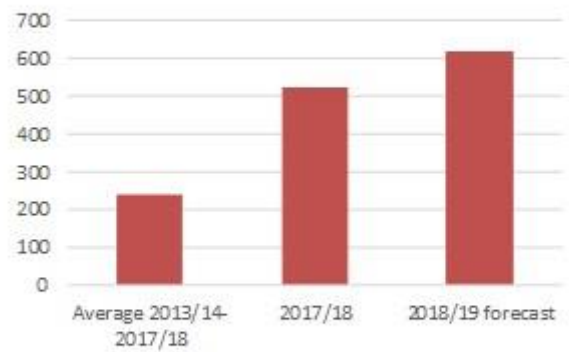
Retail prices of wheat flour and bread remained overall stable over the last months. However, in January 2019, they were respectively 10 and 7 percent higher than a year earlier, mainly on account of the weakening of the national currency and the reduced wheat harvest obtained in 2018.

Prices of potatoes, another important staple in the country, rose seasonally in the past two months and, in January 2019, were higher than a year earlier, following a below-average domestic production in 2018.

Belarus

Cereals Imports

000 tonnes



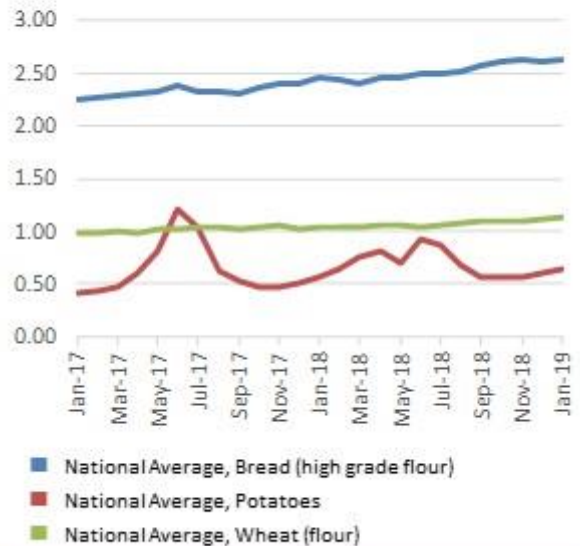
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices

Belarussian Ruble per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Belarus

Reference Date: 12-October-2018

FOOD SECURITY SNAPSHOT

- Total production of cereals in 2018 estimated at near average level
- Imports of cereals in 2018/19 well above the five-year average
- Prices of wheat products virtually unchanged in August

Total production of cereals in 2018 estimated close to 2017 level

Harvesting of spring cereals finalized at the end of September, while that of winter crops was completed by mid-August.

Cereal production in 2018 is set at a near average level of 7.7 million tonnes, similar to the output of 2017.

Wheat production is estimated at 2.6 million tonnes, slightly below last year's above-average level, while barley is set to rebound from the below-average level of 2017 with an output of 1.7 million tonnes. The year-on-year increase in barley production is mainly due to favourable weather conditions during the growing season, which resulted in better yields.

Harvesting of maize is ongoing and will be completed by mid-October. Maize production is expected at 700 000 tonnes, close to last year's level, as an increase in the area planted was offset by lower-than-average yields.

Planting of winter cereals for harvest in 2019 will be finalized by end-October under generally favourable weather conditions.

Imports of cereals in 2018/19 forecast well above the five-year average

Total cereal import requirements in the 2018/19 marketing year (July/June) are forecast at 475 000 tonnes, about 9 percent below last year's level, but well above the five-year average. Due to the lower quality of domestic production of wheat, higher shipments of milling quality wheat are expected from the Russian Federation. Total wheat imports in the 2018/19 marketing year are set at 250 000 tonnes, close to last year's high level, and still well above the average.

Belarus

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Belarus

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	2 577	2 620	2 600	-0.8
Cereals NES	1 724	1 625	1 600	-1.5
Barley	1 637	1 420	1 700	19.7
Others	1 856	1 854	1 800	-2.9
Total	7 793	7 519	7 700	2.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

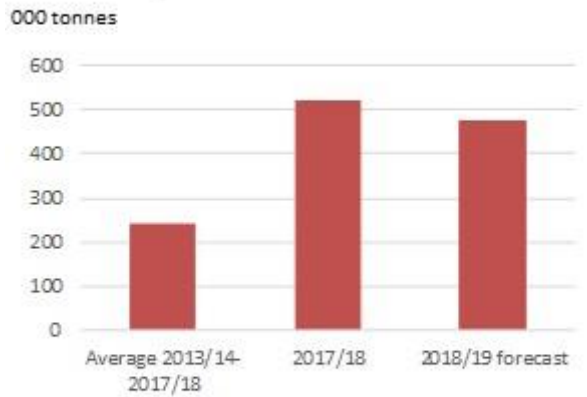
Prices of wheat products virtually unchanged in August

Prices of wheat flour and bread remained virtually unchanged in August, but were respectively 5 and 8 percent higher than a year earlier, mainly on account of the weakening of the national currency.

Prices of potatoes, another important staple in the country, declined by 22 percent in August compared to the previous month, showing a seasonal decline due to the arrival of the harvest in local markets. However, prices in August were higher, year-on-year, on account of lower domestic production in 2018.

Belarus

Cereals Imports

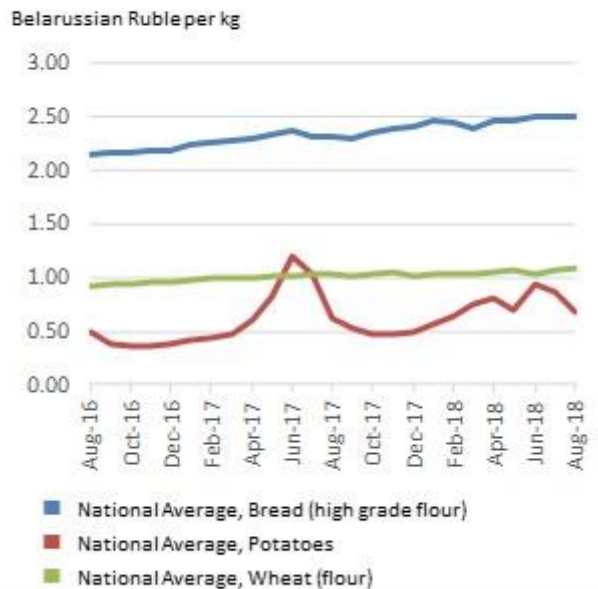


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Belarus

Selected retail prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Belarus

Reference Date: 30-October-2017

FOOD SECURITY SNAPSHOT

- Planting of winter cereals for harvest in 2018 finished by mid-October
- Latest estimates point to 10 percent year-on-year increase in 2017 cereals production
- Exports of cereals forecast to increase in 2017/18
- Prices of wheat products stable over last six months

Planting of winter cereals for harvest in 2018 finished by mid-October

Planting of winter cereals, to be harvested by mid-2018, started at the end of August under generally favourable conditions. As of 4 October, 1.242 million hectares (97.4 percent of plan) of winter cereals has been planted. Overall, winter cereals are reported to be in good conditions, as warm weather in recent weeks contributed to the active growth of winter cereals and emergence of late sown crops.

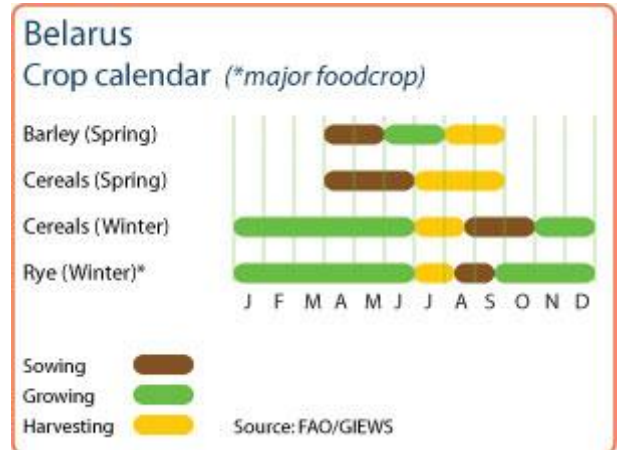
Cereal production in 2017 estimated 10 percent above below-average level of 2016

Harvesting of the majority of crops had finished by the beginning of September, with only exceptions of maize and buckwheat. FAO's latest estimates point to a 10 percent increase in cereal output from the below-average 2016 level. Aggregate cereal production is set at 7.8 million tonnes, following return-to-average yields. Wheat production is estimated at 2.8 million tonnes, up 18 percent from the below-average 2016 level. Similarly, barley output is set to rebound from the low level of the previous year to 1.4 million tonnes, based on the increased area planted and better yields.

Harvest of maize is lagging behind last year, with around 50 percent of the area harvested by the end of October. Taking into account the decrease in area planted together with lower yields, the maize output is expected to decline by 19 percent to 600 000 tonnes.

Exports of cereals to increase in 2017/18

With an upward trend in cereal production in recent years, the country became a net exporter of cereals since the 2010/11 marketing year. Total cereals exports in the 2017/18 marketing year (July/June) are forecast at about 360 000 tonnes, an increase of 16 percent from the previous year, reflecting the bigger cereal production in 2017.



Belarus
Cereal production

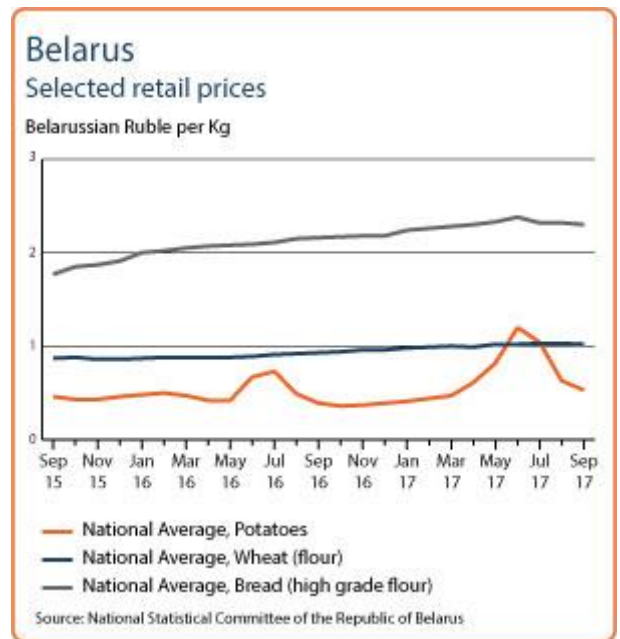
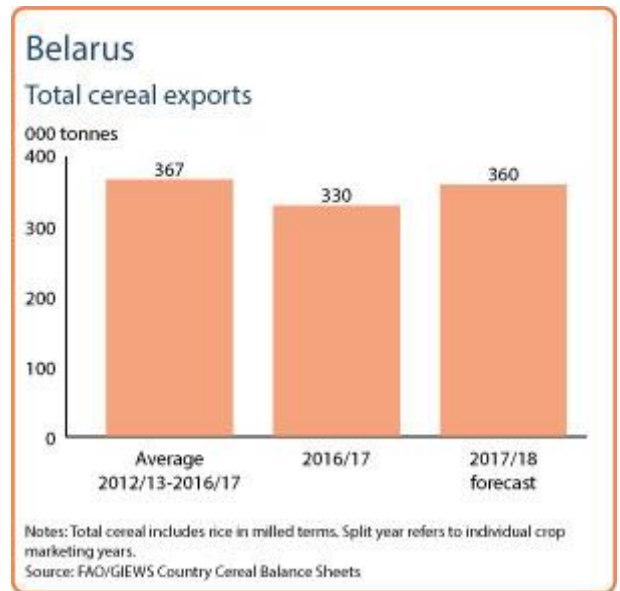
	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	2 563	2 340	2 766	18
Cereals nes	1 850	1 654	1 700	3
Barley	1 736	1 253	1 400	12
Others	1 980	1 809	1 888	4
Total	8 129	7 056	7 754	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Prices of wheat products stable over last six months

Prices of wheat flour and bread in September remained close to their values of six months earlier despite a good domestic harvest. Prices of wheat flour and bread were 10 and 6 percent, respectively, higher than their values of a year ago, underpinned by a weak national currency and increasing flour production costs. Moreover, the Government no longer sets the maximum price for bread since January 2016.

Prices of potatoes, another important staple in the country, started to decline in July with the new harvest. In September, prices were almost 60 percent below their peak values of July, but still more than 35 percent above their values of the year earlier. A decline in 2017 potatoes production is expected to keep prices above the previous year's levels in the country as well as in other CIS countries, which depend on potatoes exports from Belarus.



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GIEWS Country Brief Belarus

Reference Date: 25-April-2017

FOOD SECURITY SNAPSHOT

- Latest estimates point to 12 percent decline in 2017 cereals production
- Exports of cereals forecast to decrease in 2017/18
- Prices of wheat products rose in February

Early forecast points to 12 percent decline in 2017 cereals production

Planting of winter cereals, to be harvested by mid-2017, has been completed by November. A total of 1.6 million hectares of winter crops of grains and green fodder had been planted with a year-on-year increase of 1.4 percent. The tendency to increase the share of winter cereals plantings has been observed over the past years. Farmers prefer to plant winter crops instead of spring crops as the latter are often affected by adverse weather conditions at planting time. Winter cereals were at the stage of tillering in most of the surveyed fields by the end of March.

Spring planting operations started in March, ahead of season this year, but were hampered by wetter-than-normal weather conditions. As of end-March, spring planting was completed on 84 100 hectares (around 9 percent of the forecast area).

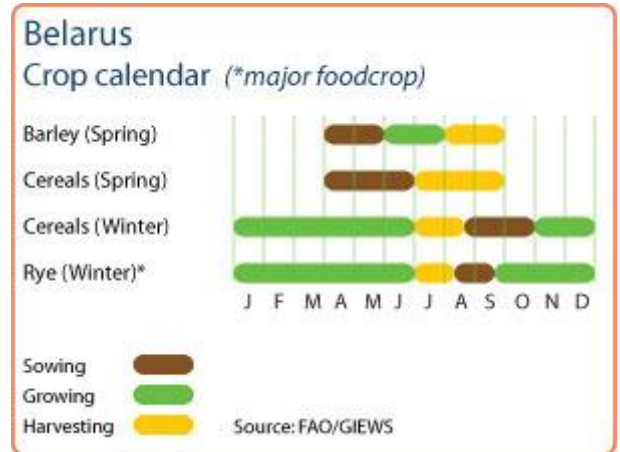
Assuming average yields, FAO's early forecast for aggregate cereal production stands at 8.5 million tonnes, a 12 percent decline from the above-average production of last year.

Exports of cereals to decrease in 2017/18

With an upward trend in cereal production in recent years, the country became a net exporter of cereals. However, total cereals exports in the 2017/18 marketing year (July/June) are forecast at about 310 000 tonnes, slightly below from the previous year, reflecting the smaller production in 2017.

Prices of wheat products rose in February

The prices for wheat flour have been rising over the past year despite a good domestic harvest of wheat in the country, underpinned by a weak national currency and increasing flour production costs. The level of inflation of the Belarussian Rouble was reported to reach 12 percent in 2016 and fuel and energy prices have been rising over the past months. Moreover, the Government no longer sets the maximum price for bread since January 2016. As a result, the national average prices for wheat



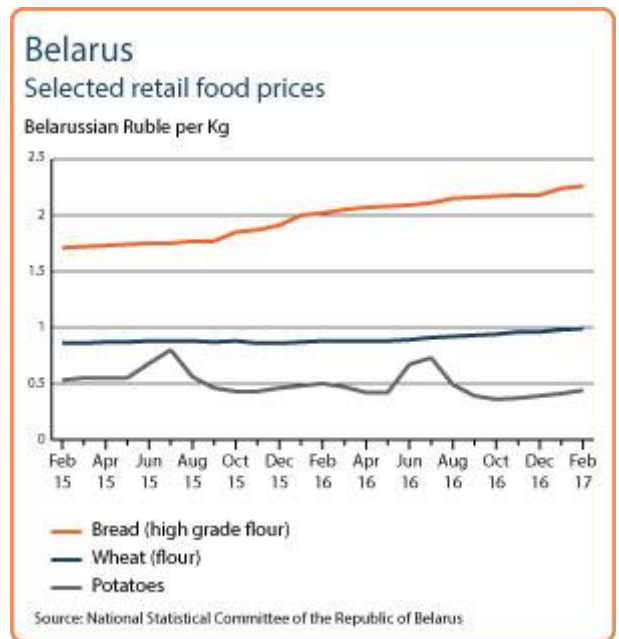
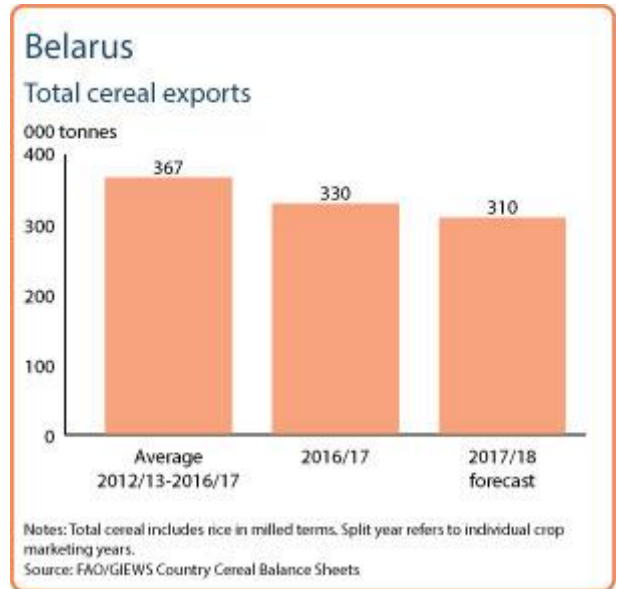
Belarus
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	2 675	2 900	2 750	-5
Cereals nes	1 979	2 300	2 044	-11
Barley	1 855	1 850	1 817	-2
Others	2 146	2 590	1 897	-27
Total	8 656	9 640	8 508	-12

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

flour and bread were around 12 percent above their levels of February 2016.

Similarly, prices of potatoes increased by 20 percent over past three months, but were 40 percent below their values of July 2016, when prices reached their two-year high as a result of the good domestic harvest in 2016.



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GIEWS Country Brief Belarus

Reference Date: 16-December-2016

FOOD SECURITY SNAPSHOT

- Latest estimates point to 5 percent increase in 2016 cereals production
- Exports of cereals on the rise in 2016/17
- Prices of wheat products rose in October

Latest estimates point to 5 percent increase in 2016 cereals production

Latest estimates of the 2016 cereal crop, harvested between July and October, point to 5 percent rise on year-to-year basis. Following an increase in the area planted, the cereal output is expected to reach 9 million tonnes, up 400 000 tonnes from 2015. Most of the projected rise is due to an increase of maize crop production which has tripled this year compared to 2015. Higher yields and larger area planted resulted in a 600 000 tonnes maize harvest in 2016. Wheat is estimated at 2.9 million tonnes, up marginally from last year.

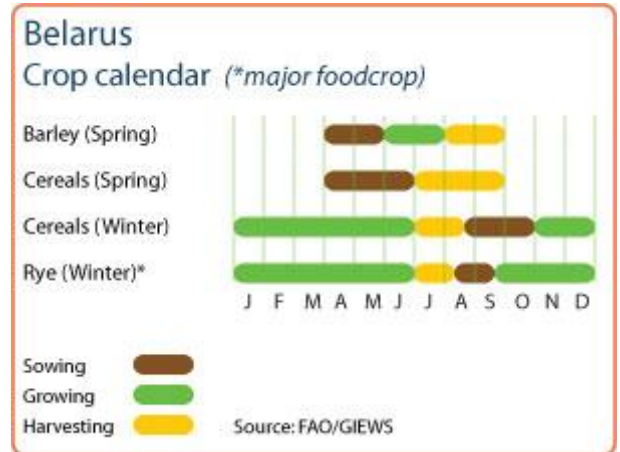
Planting of winter cereals, to be harvested by mid-2017, has been completed successfully. A total of 1.6 million hectares of winter crops of grains and green fodder had been planted, with an year-on-year increase of 1.4 percent. Weather conditions are currently favourable for the survival of the winter crops. Recent remote sensing data shows good snow coverage, which is expected to protect the plantings against freezing.

Exports of cereals continue to rise in 2016/17

With an upward trend in cereal production in recent years, the country has become a net exporter of cereals. Total cereals exports in the 2016/17 marketing year (July/June) are forecast to increase by 19 percent from the previous year, reflecting abundant carryovers, to reach about 330 000 tonnes.

Prices of wheat products rose in October

The national average prices for wheat flour and bread have been rising over the past year following currency inflation in the country. The level of inflation of the Belarussian Rouble is reported to reach 12 percent in 2016. Prices of wheat flour were 7 percent above their earlier levels, while average prices of bread increased by 17 percent year-on-year as a result of steep increases in production costs. Since January 2016, the Government no longer sets the maximum price for bread.

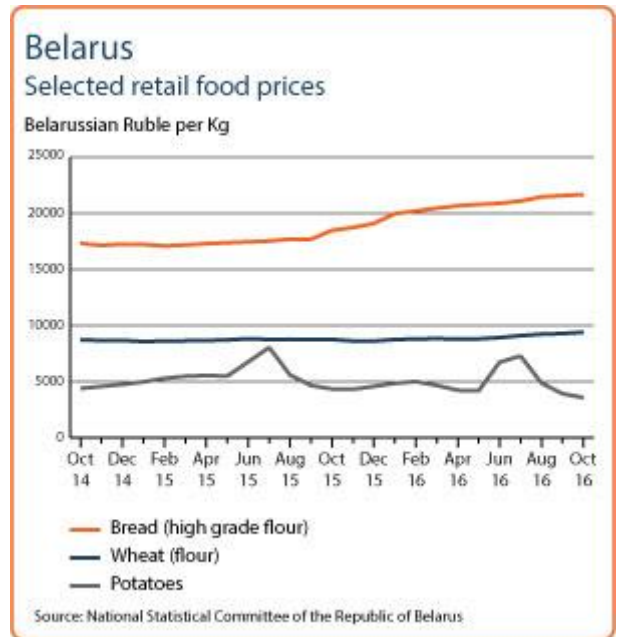
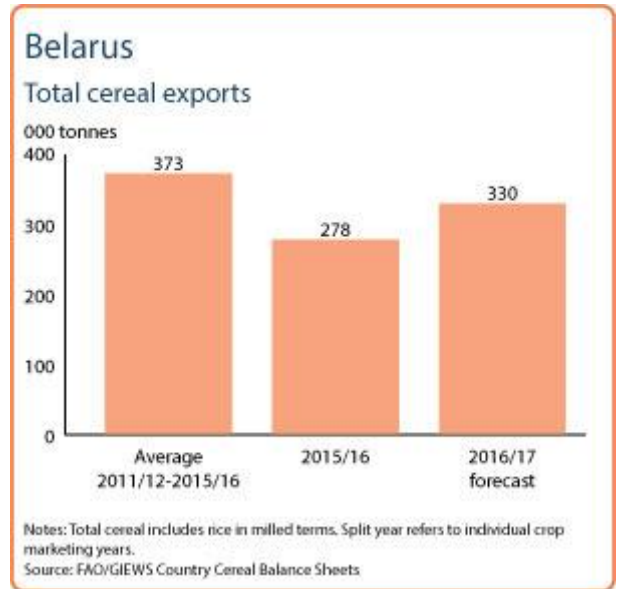


Belarus
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	2 522	2 896	2 900	0
Barley	1 881	1 849	1 850	0
Cereals nes	1 790	2 341	2 300	-2
Others	2 126	1 528	1 990	30
Total	8 319	8 614	9 040	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

By contrast, following a bumper crop this year, prices of potatoes declined by 9 percent in October and were more than 50 percent below their peak value of three months ago.



Reference Date: 08-April-2016

FOOD SECURITY SNAPSHOT

- Early forecast for 2016 cereals production points to 6 percent increase from last year
- Cereal production in 2015 declined from previous year's record crop but remained about the recent average
- Exports of cereals on the rise
- Prices of staple foods remain stable or rose slightly in past months

Early forecast for 2016 cereals production points to 6 percent increase from last year

Despite unfavourable weather conditions (an unusually warm December and cold snowless January), the outlook for the 2016 winter cereals is positive. The area planted to winter cereals last autumn for harvest in 2016 is reported to have increased by 18 percent to 1.5 million hectares (winter wheat: 550 000 hectares; triticale: 540 million hectares; rye: 350 000 hectares; barley: 15 000 hectares), while the percentage of winterkill is reportedly the smallest in the last five years. Planting of spring cereals started earlier than usual, at the end of March, reflecting the unseasonably warm weather. At this early stage, assuming normal weather for the remainder of the season, FAO forecasts the country's total cereal production in 2016 at about 8.5 million tonnes, of which 2.6 million tonnes would be wheat.

Despite increased plantings, cereal production in 2015 declined due to drought

The latest estimate of total cereal production in 2015 stands at 8.0 million tonnes, 11 percent less than the 2014 record level but still about the average of the past five years. Adversely dry weather during planting of the winter crops impacted negatively on yields. Wheat output is estimated at 2.5 million tonnes, down 15 percent from the record level of 2014, while that of barley decreased by 15 percent to 1.5 million tonnes. By contrast, conditions for the spring-planted maize crop were particularly favourable leading to a record output, estimated at 1.3 million tonnes, more than double the 2014 reduced level.

Exports of cereals continue to rise

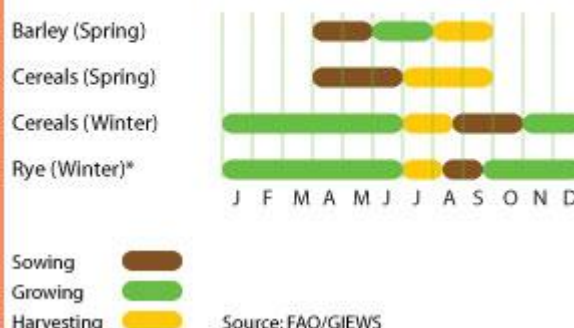
With an upward trend in cereal production in recent years, the country has become a net exporter of cereals. Despite the decrease in 2015 production, total exports of cereals in the 2015/16 marketing year are forecast to increase by about 4 percent from the previous year, reflecting abundant carryovers, to reach about 500 000 tonnes.

Prices of staple foods remain stable in past months

The national average price for wheat flour remained generally stable in early 2016, while prices for bread and potatoes rose by 1 and 3 percent, respectively, in February. In January, the Government announced that it will no longer set a maximum price for bread but will continue to do so for potatoes and other staple foods.

Belarus

Crop calendar (*major foodcrop)



Belarus

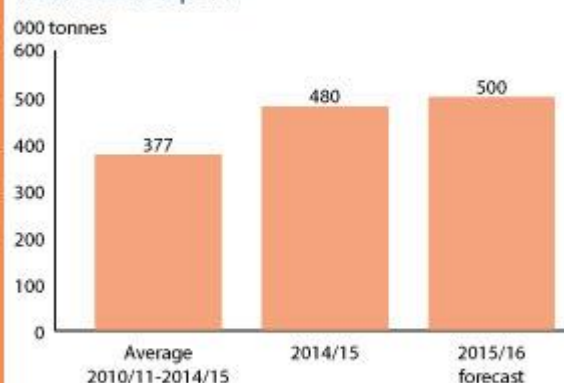
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	2 290	2 924	2 500	-15
Barley	1 905	1 988	1 500	-25
Cereals nes	1 577	2 095	1 500	-28
Others	2 170	1 998	2 540	27
Total	7 941	9 005	8 040	-11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus

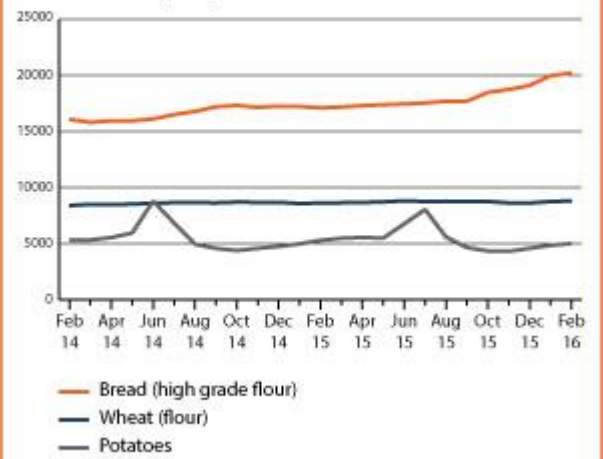
Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus Selected retail food prices

Belarussian Ruble per Kg



Source: National Statistical Committee of the Republic of Belarus

Reference Date: 10-June-2015

FOOD SECURITY SNAPSHOT

- Cereal production in 2015 forecast to decline from last year's record crop but to remain at above-average levels
- Exports of cereals on the rise
- Prices of staple foods remain stable in past months

Cereal production in 2015 is forecast to decline from last year's record crop but to remain at above-average levels

The 2015 winter cereal crops, mainly wheat, to be harvested from July, are currently growing under overall favourable weather conditions. The slightly above-normal temperatures are contributing to an advanced development of the crops.

Planting of the 2015 spring crops, mainly barley and maize, which was somehow hampered because of the above average rains in April, is now complete.

The outlook for this year's cereal production is largely positive. After a mild winter, most of the country benefitted from adequate and timely rains, with slightly drier-than-usual conditions recorded only in southern eastern provinces (Mogilev, Gomel and Brest).

Favourable cropping conditions, combined with timely provision of fertilizers, seeds and other agricultural inputs through State subsidies, are anticipated to result in higher yields of cereals this season.

The area planted to cereals (winter and spring seasons) was estimated at 2.6 million hectares or close to the five-year average, with winter cereals plantings accounting for about 45 percent of the total.

The aggregate 2015 cereals output is forecast at around 8.7 million tonnes, which is 4 percent lower than last year's level but still 8 percent above the five-year average.

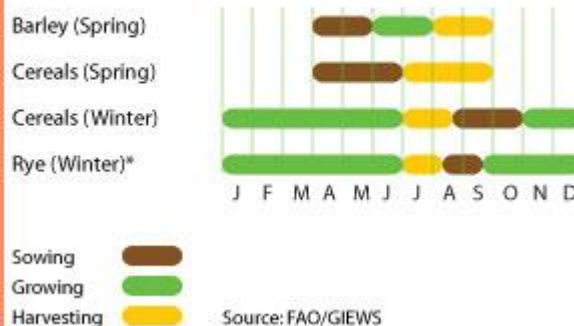
Exports of cereals on the rise

With increased cereal production in recent years, the country has become a net exporter of cereals. Export opportunities are mainly connected to its membership with the Eurasian Economic Union, whose other members are the Russian Federation and Kazakhstan. In 2014/15 the cereals exports are projected at about 720 000 tonnes.

Prices of staple foods remain stable in past months

National average prices of staple foods, wheat products and potatoes, remained generally stable over the past months. In April, prices of wheat flour and potatoes were around their year-earlier levels, but those of bread were higher, in nominal terms.

Belarus Crop calendar (*major foodcrop)

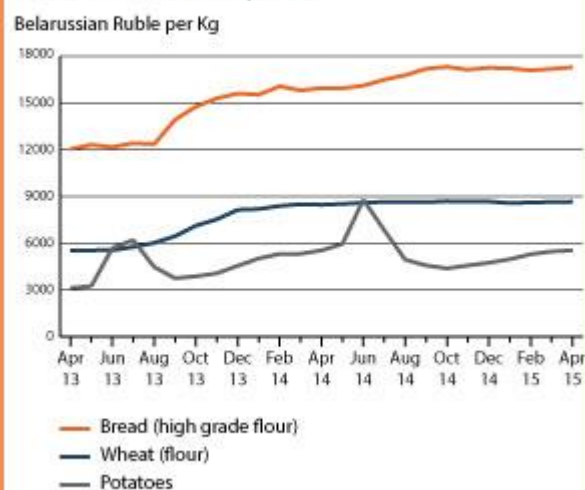


Belarus Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	2 070	2 500	2 400	-4
Barley	1 918	2 100	2 000	-5
Cereals nes	1 275	1 300	1 275	-2
Others	2 809	3 190	3 030	-5
Total	8 072	9 090	8 705	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus Selected retail food prices



Reference Date: 23-July-2014

FOOD SECURITY SNAPSHOT

- Prospects for 2014 cereal production are favourable
- Cereal imports decreased in 2013/14 marketing year (July/June)
- Prices of wheat products stable in past months but well above their year earlier levels

Prospects for 2014 cereal production are favourable

Harvest of the 2014 winter cereal crops, mainly wheat, is underway, while spring barley is maturing. The outlook for this year's cereal production is largely positive. After a mild winter, below average rains were recorded in April but abundant precipitation followed in May and June, timely replenishing soil moisture levels. Temperatures during the cropping season were close to normal levels.

Winter wheat is reported in overall good conditions and above average yields are anticipated.

Good conditions are also reported for spring maize and barley crops, which benefited of early sowing and adequate soil moisture, due to above average precipitation in May and June. Favourable cropping conditions combined with timely provision of fertilizers, seeds and other agricultural inputs through state subsidies are anticipated to higher yields of cereals this season.

The area planted to cereals was estimated at 2.6 million hectares or close to the five-years average. Winter cereals plantings account for about 44 percent of the total. The total 2014 cereals output is forecast at around 8.1 million tonnes, which is close to last year's level and 5 percent above the five years average.

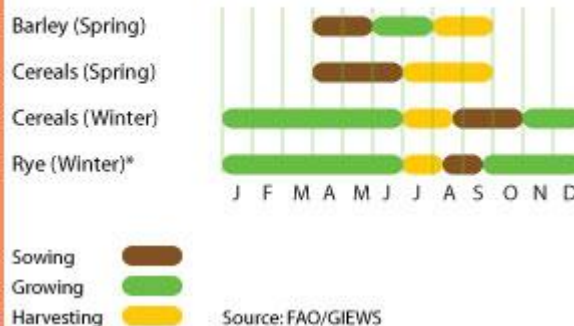
Imports decreased in 2013/14 marketing year (July/June)

The country imports small volumes of high quality wheat, barley and maize for the food industry. Cereal imports in 2013/14 (July/June) are estimated at 129 000 tonnes, slightly below from last year's level, and amount about only 2 percent of domestic needs. In recent years, the country has become a net exporter of cereals. Export opportunities are mainly connected to its membership with the Customs Union (to be converted to the Eurasian Economic Union from January 2015), whose other members are the Russian Federation and Kazakhstan.

Prices of wheat products stable in past months but well above their year earlier levels

In spite of the country's adequate food supply, prices of staple foods are well above their levels of a year earlier in nominal terms. Prices of wheat flour, bread, and potatoes in May 2014 were 54, 32, and 83 percent respectively, higher comparing to their year –earlier level. This was partially due to general and food inflation, reported at 17 and 20 percent respectively on yearly basis, supported by depreciation of the national currency and changes on state price regulation on some types of

Belarus Crop calendar (*major foodcrop)

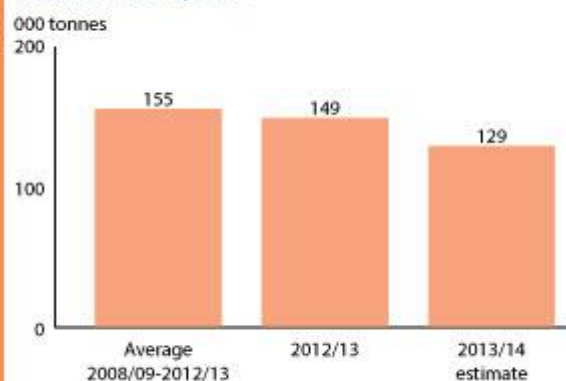


Belarus Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	1,870	1,900	2,000	5
Barley	1,868	1,740	1,800	3
Cereals nes	1,285	1,200	1,200	0
Others	2,664	3,218	3,068	-5
Total	7,687	8,058	8,068	0

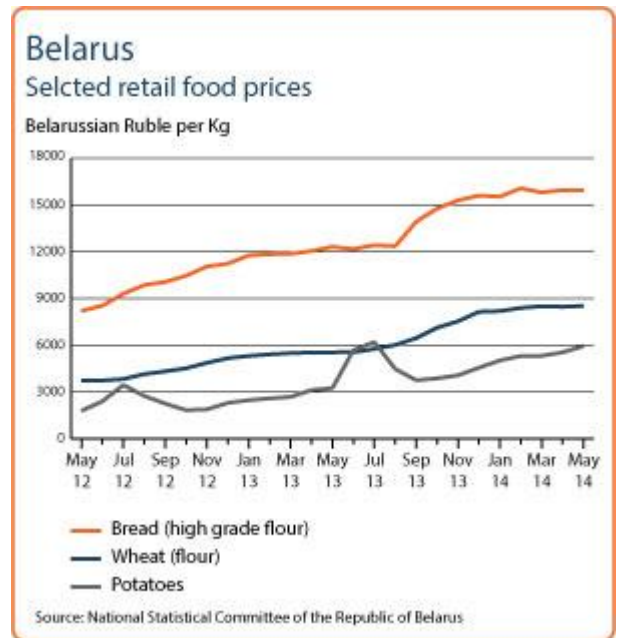
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

bread.



Reference Date: 22-March-2013

FOOD SECURITY SNAPSHOT

- Early prospects for 2013 cereal production are satisfactory
- Record cereal harvest gathered in 2012
- Import requirements increase for 2012/13 marketing year
- Prices of basic food increase continuously

Early prospects for 2013 cereal production are satisfactory

In 2012, the planting of winter crops was mainly carried out in good agronomic and weather conditions. Winter cereals were planted across an area of 1.4 million hectares and the area under winter cereals is close to the previous year's level. On average, winter cereals account for about 44 percent of the total planted area under cereals, and over 63 percent of this was made up of wheat and rye. Overall, the condition of winter crops is satisfactory. According to the Hydro-meteorological services of the Republic of Belarus, winter kills are insignificant for late March due to widespread snow coverage. However, continuing cold weather in March combined with thawing snow raises further concern and requires fields to be monitored.

The Ministry of Agriculture and Food plans to harvest over 10 million tonnes of grain in 2013, mainly to increase the production of coarse grains. Preparations are being made for the spring planting season and state subsidies are being provided for fuel, fertilizers and other agricultural inputs.

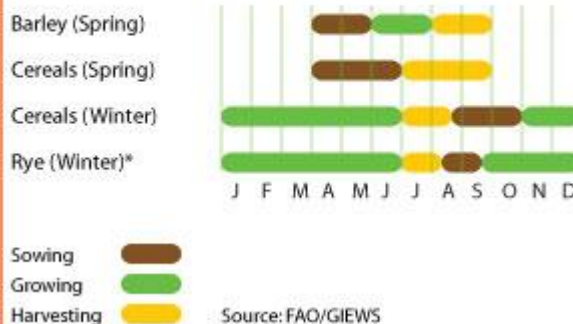
Record cereal harvest in 2012

In 2012, the country reported a record cereal harvest, with wheat and rye crops representing around 23 and 17 percent of the total output respectively. Total cereal output increased by about 12 percent, demonstrating continuous stable growth. This is mainly due to a well above average coarse grain production, which saw a 15 percent increase in yields. Aggregate cereal production in 2012 is estimated at 8.7 million tonnes, of which 6.7 million tonnes coarse grains. Favourable cropping conditions contributed to the higher yields, and these high yields were supported by the timely provision of fertilizers, seeds and other agricultural inputs through state subsidies.

Import requirements increase for 2012/13 marketing year

Despite the country having significantly increased cereal production in recent years, the import requirements in terms of cereals for 2012/13 (July/June) are estimated at 475 000 tonnes. This is an increase of four times compared to the previous marketing year. However, the country's import dependency is insignificant (6 percent of domestic needs). Although the country's cereal production has increased, export availability is less than 1 percent of total cereal production due to the expansion of the livestock sector and the high demand for feed. The country's export opportunities are mainly connected to its membership of the newly-formed Customs Union (CU), whose other members are the Russian Federation, Kazakhstan and the Eurasian Economic Space.

Belarus Crop calendar (*major foodcrop)

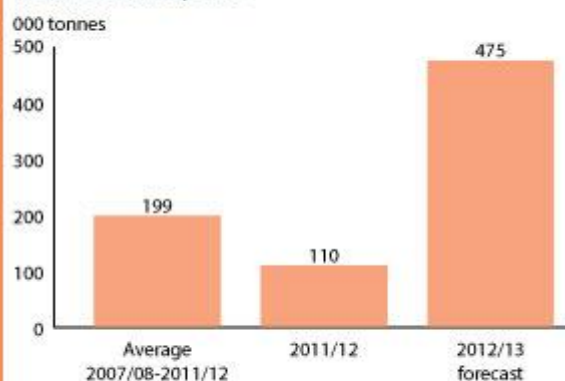


Belarus Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Barley	1,945	1,900	2,000	5
Wheat	1,673	2,070	2,000	-3
Rye	1,141	788	1,500	90
Others	2,297	2,967	3,180	7
Total	7,055	7,725	8,680	12

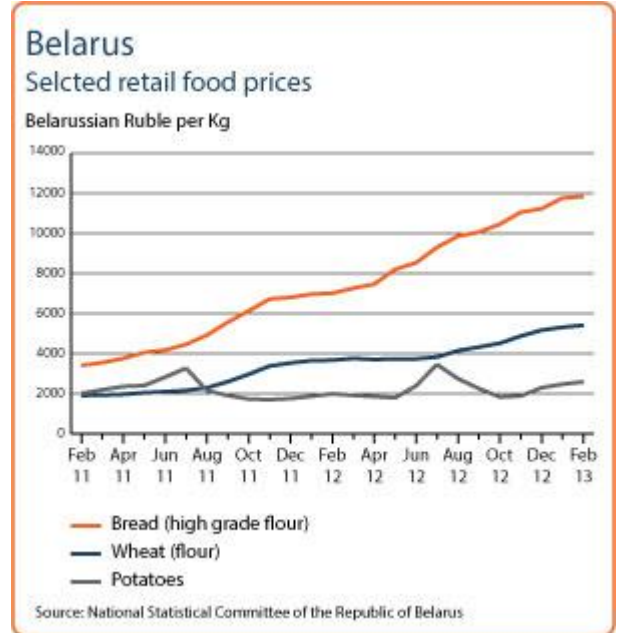
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus Total cereal imports



Prices of basic food increase continuously

In spite of the country's adequate food supply, prices of staple foods have increased in nominal terms year-on-year. The highest increases have been recorded for wheat flour, bread, and potatoes by 48, 69, and 30 percent, respectively. The overall macro-economic situation, the accelerating inflation rate and the easing of the food price regulation by state authorities have all contributed to the higher food prices.



Reference Date: 27-September-2012

FOOD SECURITY SNAPSHOT

- Record cereal harvest gathered in 2012
- Import requirements decrease for 2012/13 marketing year
- Prices of basic food increase significantly

Record cereal harvest in 2012

In 2012, the country registered a record cereal harvest, with wheat and rye crops representing around 23 and 17 percent, respectively, of the total output. This is mainly due to a well above average coarse grain production, on account of a 15 percent increase in yields. Favourable cropping conditions contributed to the higher yields, as well as timely provision of fertilizers, seeds and other agricultural inputs.

The 2012 winter planting season has just started with overall satisfactory conditions. On average winter cereals account for about 44 percent of the total planted area under cereals and over 63 percent of that is comprised of wheat and rye. The planted area under winter cereals is expected to be close to the previous year's level.

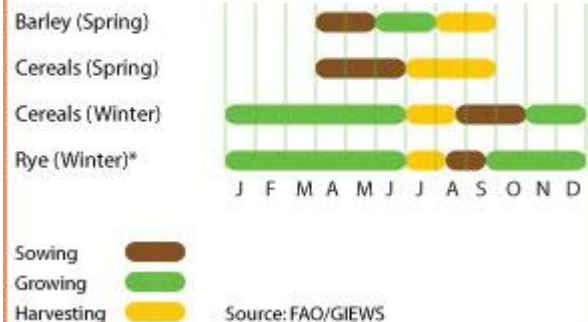
Import requirements decline for 2012/13 marketing year

The country has significantly increased cereal production in recent years and as a result has become almost self-sufficient. The cereal import requirements for 2012/13 (July/June) is estimated at only 44 000 tonnes or nearly half as much as the previous 2011/12 marketing year. Although the country's cereal production has significantly increased, export availabilities is less than one percent of the total cereal production due to the expansion of the livestock sector and consequently the high demand for feed. The export opportunities of the country are mainly connected to membership of Belarus in the newly-formed Customs Union (CU) among the Russian Federation, Belarus and Kazakhstan and the Eurasian Economic Space.

Prices of basic food significantly increased

In spite of the country's adequate food supply, prices of staple foods have increased in nominal terms on yearly basis. The highest increases have been recorded for wheat flour and bread, rising by 78 and 208 percent respectively relative to a year ago. Potato prices have also risen, increasing by 28 percent. The overall macroeconomic situation, an accelerating inflation rate and the easing of food price regulation by the state authorities, have contributed to the higher food prices

Belarus Crop calendar (*major foodcrop)

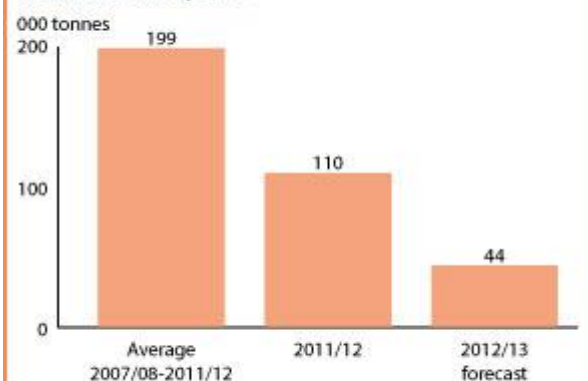


Belarus Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Barley	1,945	1,900	1,950	3
Wheat	1,659	2,000	2,000	0
Rye	1,141	788	1,480	88
Others	2,297	2,967	3,156	6
Total	7,041	7,655	8,586	12

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

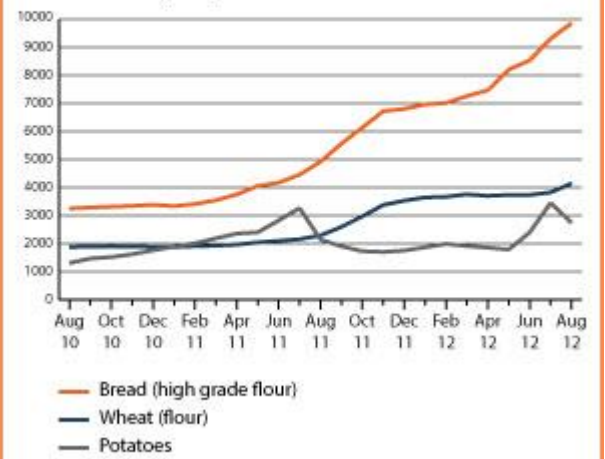
Belarus Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus Selected retail food prices

Belarussian Ruble per Kg



Source: National Statistical Committee of the Republic of Belarus

Reference Date: 28-May-2011

FOOD SECURITY SNAPSHOT

- Early forecasts indicate favourable conditions for crops in 2011
- Import requirements are insignificant; cereal export potentials are predicted
- Prices of basic food on the increase

Early forecasts indicate favourable conditions for crops in 2011

The 2011 winter planting season started with delays due to dry weather conditions. Winterkill is estimated at about 12 percent of the cereal-planted area but some lost areas were sown again during the spring season that was completed by early May. Good precipitation since early April improved soil moisture favouring winter crops development. The area planted to cereals this year (winter and spring seasons) is officially estimated at 2.6 million hectares, slightly higher than in 2010, following government support to farmers with the provision of fertilizers and other agricultural inputs. A significant increase of the maize planted is reported which is almost 27 percent higher the last year's level. The 2011 aggregate cereal production is expected at around 8.3 million tonnes, out of which some 77 percent is coarse grains, which is 19 percent higher compared with last year's level. This official forecast mainly reflects expected higher yields.

Import requirements are insignificant; cereal export potentials are predicted

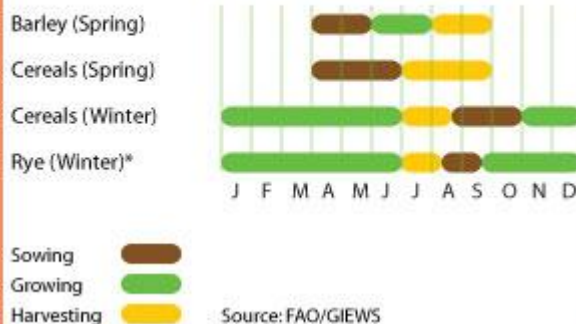
The country has become almost self-sufficient in cereals in recent years. The cereal import requirements for 2010/11 (July/June) is estimated at only 62 000 tonnes and the country has exportable surplus of cereals.

The export opportunities of the country are mainly connected to Belarus' membership in the newly-formed Customs Union (CU) between the Russian Federation, Belarus and Kazakhstan which in early March cancelled the 5 percent import duty on wheat rye and oats until 30 June 2011.

Prices of basic food on the increase

Despite the overall satisfactory food supply situation in the country, prices of bread and potatoes increased in April 2011 by 31 percent and 86 percent respectively higher from a year earlier. Wheat flour prices have increased by 6 percent for the same period.

Belarus Crop calendar (*major foodcrop)

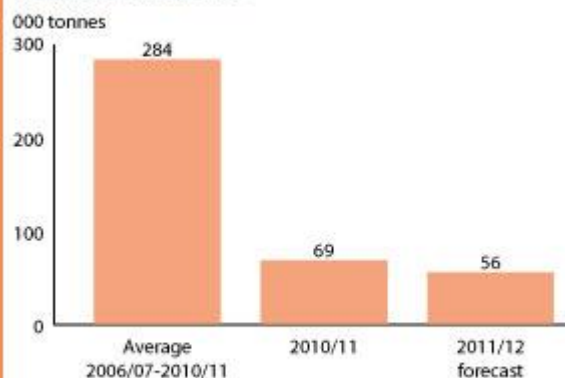


Belarus Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Barley	1 954	1 966	2 000	2
Wheat	1 483	1 740	1 850	6
Rye	1 198	736	1 300	77
Others	2 826	2 678	3 680	37
Total	6 711	6 935	8 230	19

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus Total cereal imports

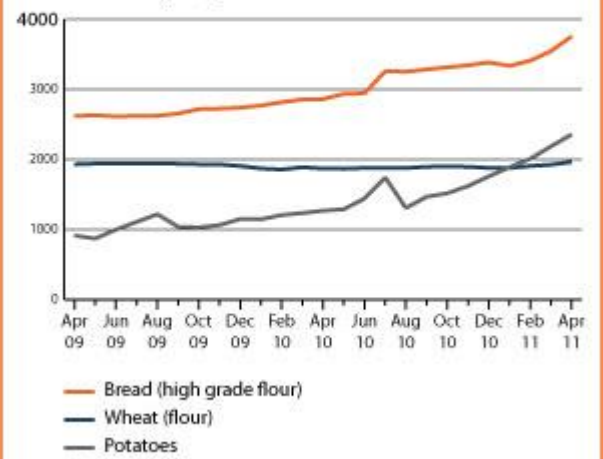


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Belarus

Selected retail food prices

Belarussian Ruble per kg



Source: National Statistical Committee of the Republic of Belarus