Ukraine: Early Prospects for 2018/19 Winter Grains

Early prospects for Ukraine’s 2018/19 winter crops are favorable. According to the State Statistical Service of Ukraine, winter wheat was planted on 6.56 million hectares (against 6.41 million for 2017/18), winter barley on 0.98 (1.04) million, and winter rye on 0.15 (0.17) million. All values include estimated area in Crimea. (See Figure 1.)

For the past eleven years, winter wheat area in Ukraine has remained fairly stable, usually between 6.4 and 6.8 million hectares, while the area of winter barley and rye has been declining. Wheat comprises about 85 percent of the winter grain area in Ukraine and is grown throughout the country, although the steppe zone in eastern and southern Ukraine is the dominant production region. (See Figure 2.) Barley accounts for about 13 percent and is grown only in southern Ukraine due to its low tolerance for frost. A small amount of rye is grown in Ukraine, and only in the north.

Rapeseed is the only major winter oilseed crop grown in Ukraine, and in recent years the planted area has fluctuated between 0.9 and 1.1 mha. (Planted area for 2016/17 dropped to 0.7 mha due to severe fall dryness that discouraged the planting of rapeseed, which is the earliest-planted winter crop in Ukraine.) For 2018/19, winter rapeseed was planted on 1.02 million hectares (mha), against 0.91 mha last season. (See Figure 3.) The winter crop comprises almost all of Ukraine’s rapeseed production, and is grown throughout the country.

The fall sowing campaign proceeded in a timely fashion due to favorably dry weather during September. (See Figure 4.) This was followed by beneficial rainfall in October which provided moisture for emergence and establishment. The Ukraine Ministry of Agrarian Policy and Food (MAPF) reports that nearly 100 percent of the planted winter grains and 97 percent of the rapeseed emerged successfully.

Ukraine’s winter crops typically enter dormancy during December, but persistently above-average temperatures in most parts of the country delayed the onset of dormancy this season. The normal cold-acclimation process for winter wheat occurs in two stages: hardening and dormancy. Optimum conditions for hardening include 5 to 6 days with average daily temperatures between zero and 6 degrees centigrade (C). Dormancy is the second step, and requires 2 to 5 days with temperatures between -2 and -5 degrees C. Fully dormant winter wheat can withstand soil temperatures of -17 degrees C. Although dormancy was delayed this season, daily temperature data indicate that winter wheat in the steppe zone had likely advanced through both the hardening and dormancy steps by mid-January. (See Figure 5.)

Current winter-crop conditions are favorable. According to MAPF data, 86 percent of Ukraine’s winter grains were in good or satisfactory condition as of January 21, compared to 82 percent last year. (See Figure 6.) Winterkill (winter-crop losses resulting from fall drought or winter frost) is typically fairly low in Ukraine; losses have been lower than 3 percent for eight of the past ten years.

Initial USDA global crop-production estimates for 2018/19 will be released on May 10, 2018.
Figure 1.

Ukraine: Sown Winter-Crop Area
(Includes estimated sown area for Crimea.)

The year label indicates the marketing year; the "06/07" crop was planted autumn 2005 and harvested summer 2006.

Source: State Statistical Service of Ukraine
Figure 2.

Ukraine Winter Wheat: Fall-Sown Area for 2018/19

Includes estimated area for Crimea

Source: State Statistical Service of Ukraine
Figure 3.

Ukraine: Fall-Sown Area of Winter Rapeseed

Rapeseed is the first winter crop to be planted. Sowing begins in late August and is largely finished by early October.

Source: State Statistical Service of Ukraine
Figure 4.

**Ukraine: Winter-Grain Sowing Progress**

Fall sowing proceeded at a near-average pace, and more rapidly than last year despite similar moisture conditions.

Source: Ministry of Agrarian Policy and Food
Average Temperature (°C) in Ukraine Steppe Zone (WMO Station)

November 1 to January 15

Temperature required for the onset of full dormancy.

Average daily temperatures in the steppe zone were above average throughout December, which delayed dormancy for winter wheat.

Source: WMO daily weather data
Figure 6.

Ukraine Winter Grains: Reported Conditions as of Late January
(Ministry of Agrarian Policy and Food)

Source: Ukraine Ministry of Agrarian Policy and Food

FAS World Agricultural Production (WAP) circular
(https://www.fas.usda.gov/data/world-agricultural-production)

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