

Commodity Intelligence Report

May 12, 2020

Russia Early Season Expectations for Winter and Spring Crops

Overall, Russia's winter and spring crops are expected to be above average for the MY 2020/21 season. This report will discuss planting progress and early season conditions for wheat (both winter and spring), barley, corn, sunflowerseed, and other minor crops.

Winter Grains:

Wheat in Russia is divided between two different geographic and temporal crop seasons. The first crop season is winter wheat, which is grown in European Russia (including the Southern, Central, Volga, and North Caucasus districts) and typically accounts for about half of total wheat area and about 70 percent of production (See Figure 1). The MY2020/21 winter wheat crop was planted August through November 2019 and will be harvested beginning in July 2020. According to data from the Russian Ministry of Agriculture published in the beginning of December 2019, the area planted to total winter grains in 2020/21 is a record and is up year-to-year by 6 percent (See Figure 2). Within this total winter grain planting, winter wheat accounts for about 85 percent and the remainder is divided between barley, rye and triticale. Winterkill has generally been low during the last few years for all crops and this year is no exception (See Figure 3). Warmer-than-average conditions over winter minimized concerns over high amounts of winterkill. During the few time periods when the temperature dropped to crop damaging levels, the crop had beneficial snow coverage.

Russia wheat production for MY 2020/21 is forecast at 77.0 million metric tons (mmt), which includes 57.0 mmt of winter wheat and 20.0 mmt of spring wheat. USDA crop production forecasts for Russia exclude forecast output from Crimea. Total area is forecast at 27.5 million hectares (mha), which includes 15.6 mha of winter wheat and 11.9 mha of spring wheat. Total wheat yield is forecast at 2.80 tons per hectare. Winter barley is a relatively small crop in Russia, only accounting for 10 percent of total barley production for MY 2020/21. Total barley production, including spring barley, is forecast at 17.5 mmt.

Early-season conditions for the winter crops (wheat, barley and rye) are mixed. Planting occurred during drier-than-average conditions in the autumn. Early spring conditions, especially in the Southern and North Caucasus districts, have been drier-than-average as well (See Figure 4). Timely rainfall, however, has occurred in the areas of concern in the Southern and North Caucasus districts, which together account for almost 58 percent of winter wheat production and 98 percent of winter barley production (See Figure 5). Favorable weather patterns throughout the Volga and Central districts gave no reason for concern over crop development. Recently, accelerated spring growth has stalled with a pattern of cooler temperatures that has slowed crop development. The potential winter grain yields will hinge largely on weather during May and June. Winter wheat in the southern regions is expected to enter the most critical stage--flowering--in mid-May. Harvest will begin in early July in the southern production regions for both wheat and barley.

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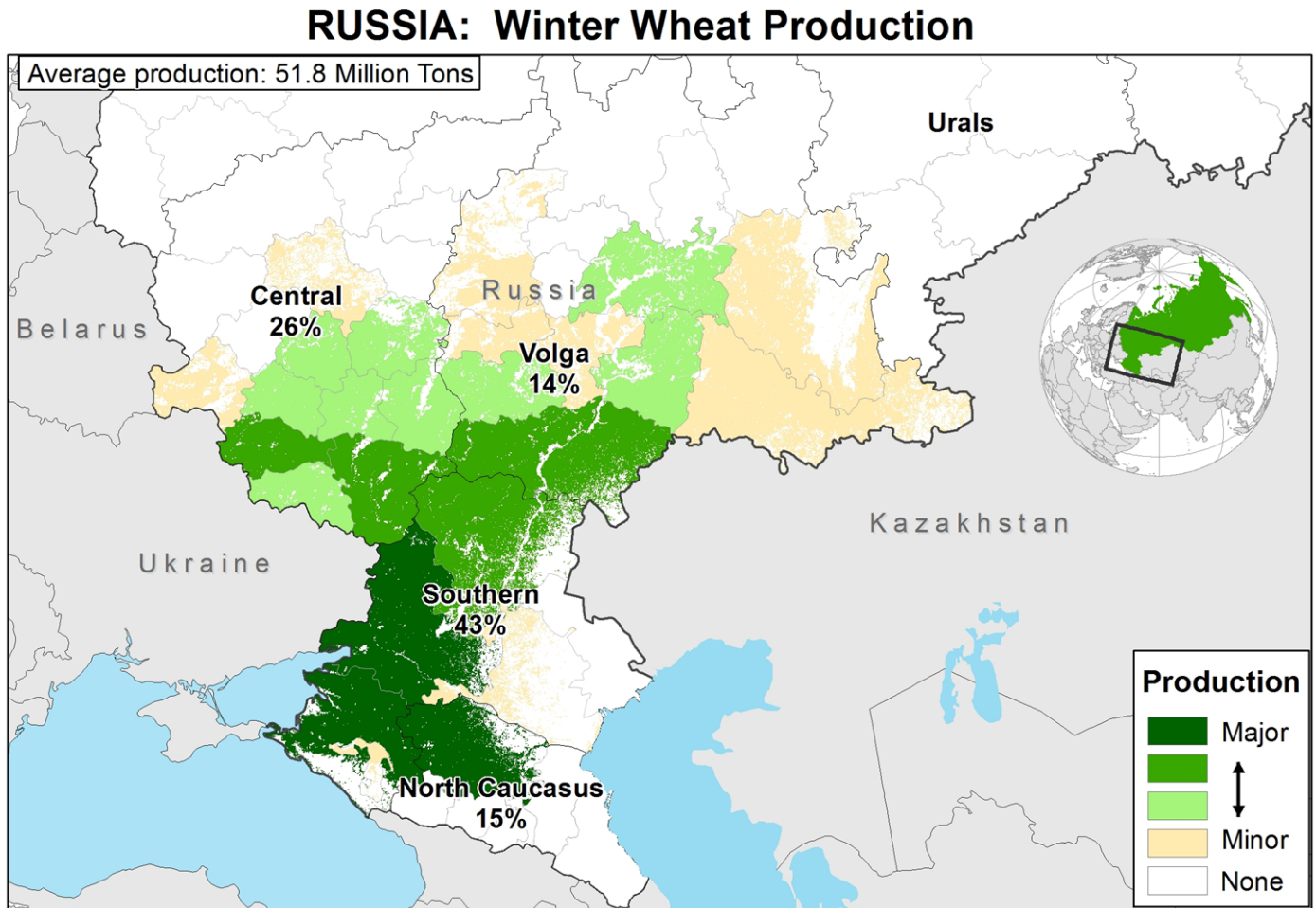
Spring Crops:

Spring crop planting has begun, and record production is expected for the three main oilseed crops, sunflowerseed at 15.5 mmt, rapeseed at 2.1 mmt and soybeans at 4.7 mmt. Based on early-season Russian Ministry of Agriculture reports, area is expected to increase for both sunflowers and soybeans and remain relatively stable for rapeseed. Statistically, oilseeds in Russia have a strong trend in their yields based on improved farming practices and the use of hybrid seeds (See Figure 6). Sunflowers, especially, are more drought tolerant plants, so area is expected to increase during periods of spring dryness. Oilseeds also offer a higher rate of return than other crops. Higher-than-normal planting coupled with the upward trend in yields will potentially lead to records for all three crops.

Corn production is forecast at 14.5 mmt. Corn planting in Russia is about half complete as of April 30th and planted area is expected to increase year-to-year (See Figure 7). Corn is mainly planted in European Russia in the Southern, North Caucasus and Central Districts. As planting continues, more rainfall in the coming month will be helpful for seed germination. Additionally, based on the same early-season Russian Ministry of Agriculture reports, spring wheat and spring barley planted area is expected to decrease year-to-year. Planting of both crops began in late April and planting progress is about 12 percent complete for wheat and 40 percent complete for barley as of the 30th of April. Spring wheat and barley are mainly planted in the regions bordering Kazakhstan: the Volga, Urals and Siberian districts of Russia, though spring barley also has a sizable portion planted in the Central district. Soil moisture conditions for the spring wheat zone are generally favorable across the Volga and Urals district, however, soil moisture conditions are below average for planting in Siberia (See Figure 8). Planting will accelerate in all districts for all spring crops throughout May.

The contributions of staff at the USDA-FAS office in Moscow are gratefully acknowledged.

Figure 1: Winter Wheat Production Map



Data Source: Rosstat, Average Crop Production 2015-2019;
IIASA Hybrid Crop Cover 2015

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Figure 2: Russia Ministry of Agriculture Sown Area

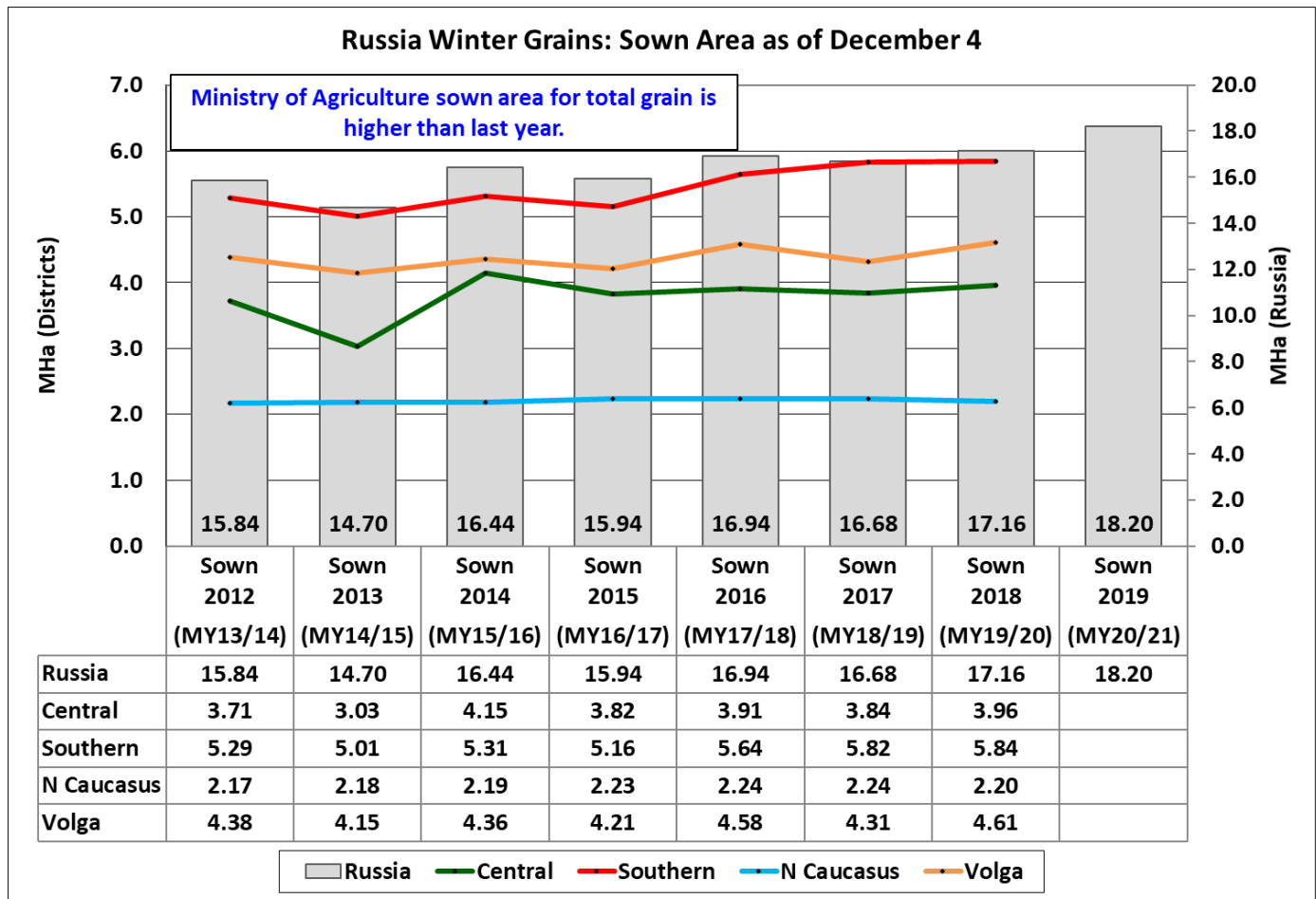


Figure 3: Average Abandonment (Including Winterkill) for Winter Wheat

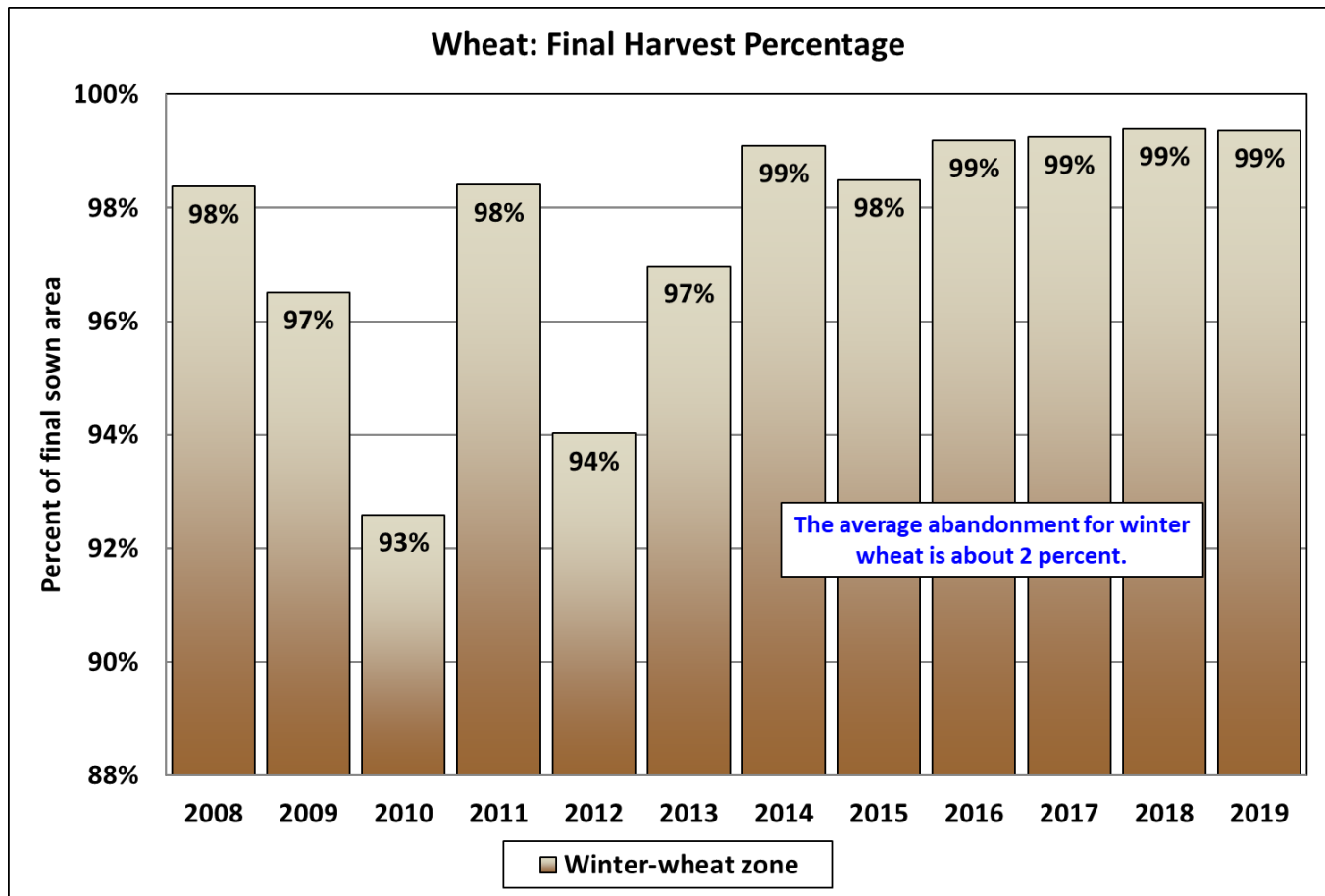
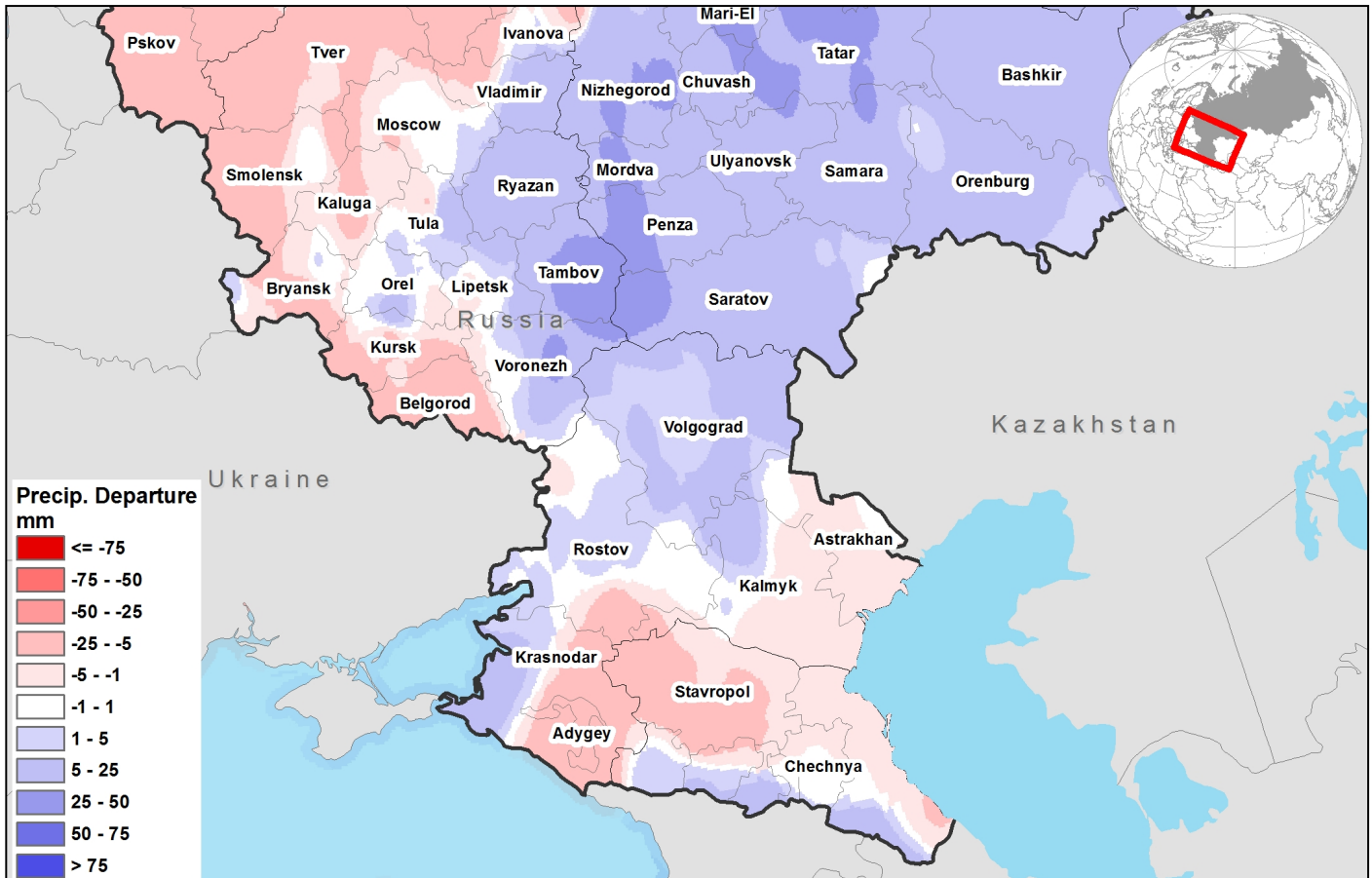


Figure 4: Early Spring conditions have been drier than normal in the Southern District

European Russia Precipitation Departure from Normal (April 20 - 26, 2020)



Source: World Meteorological Organization

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Figure 5: Timely Rainfall in the Southern and North Caucasus Districts (WMO Cumulative Precipitation, selected stations)

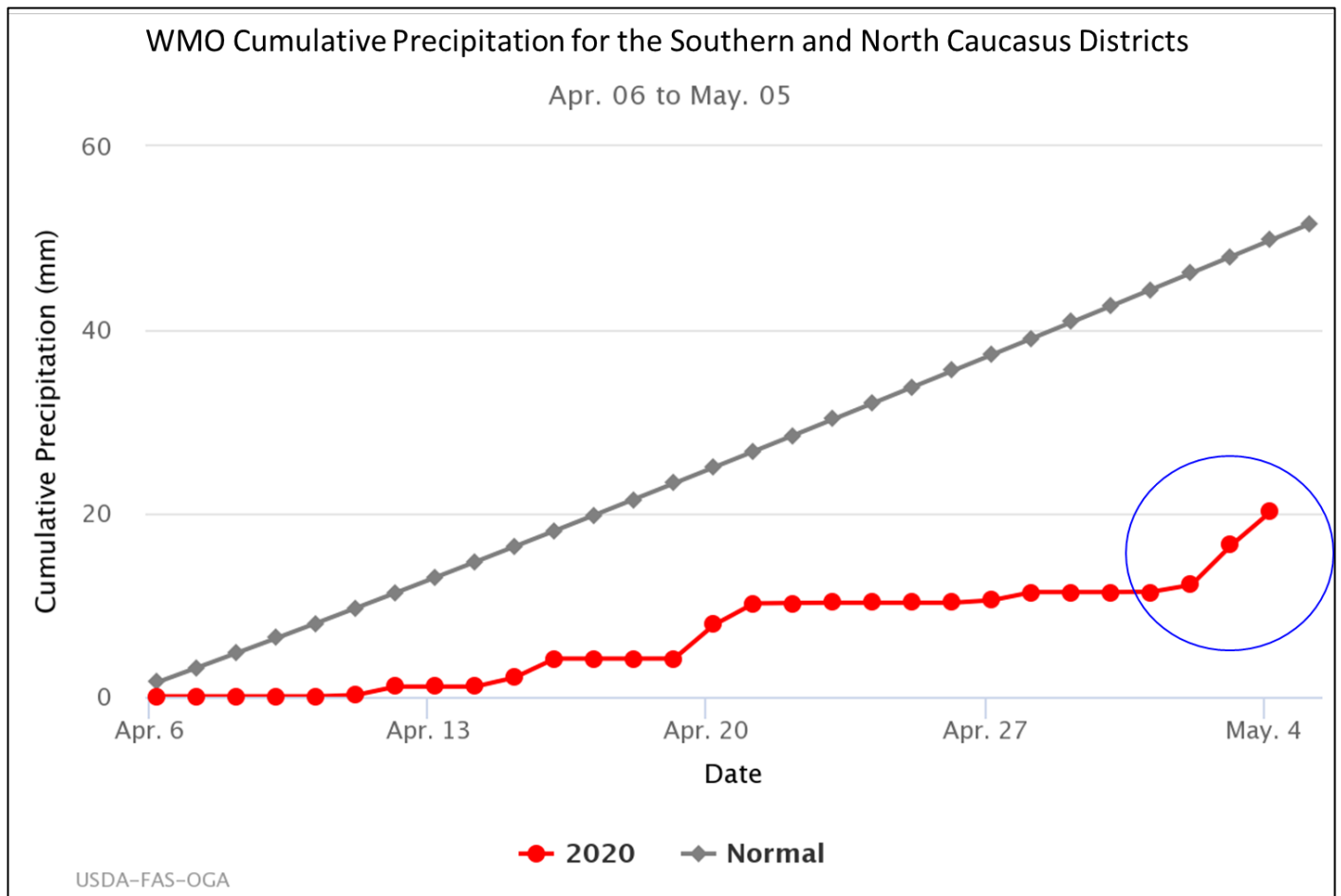


Figure 6: Russia Sunflowerseed Yield

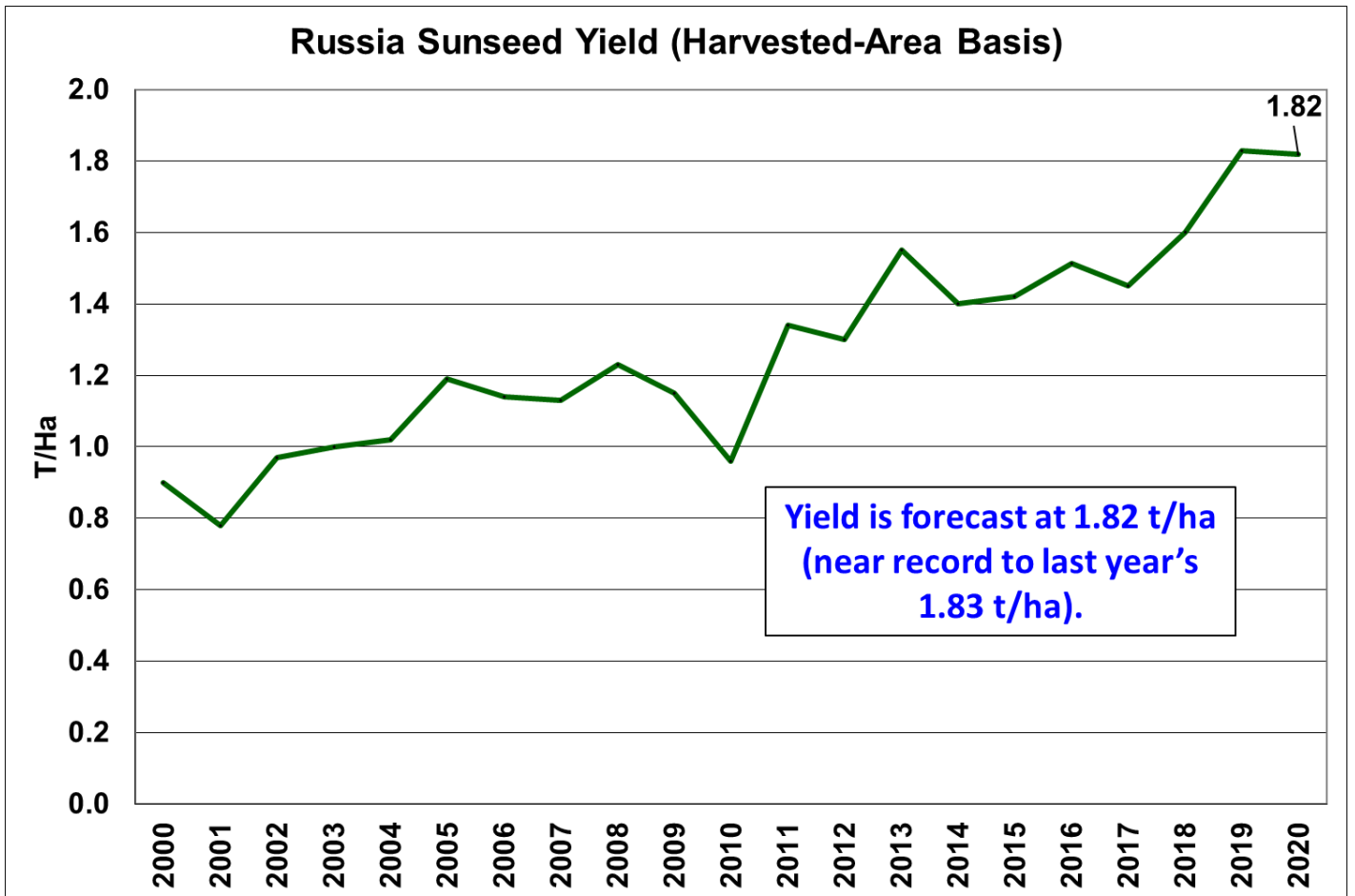


Figure 7: Corn Planting Progress

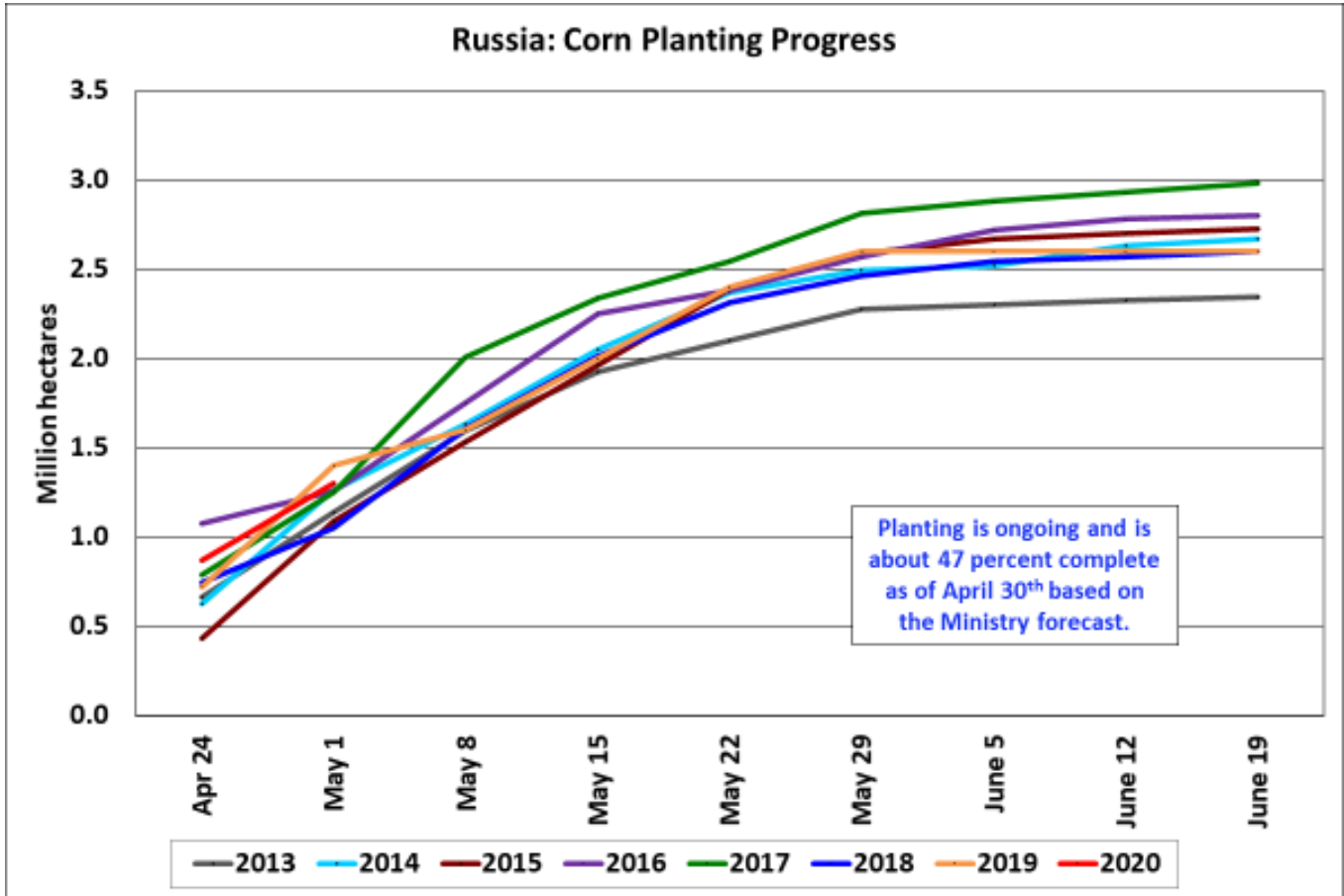
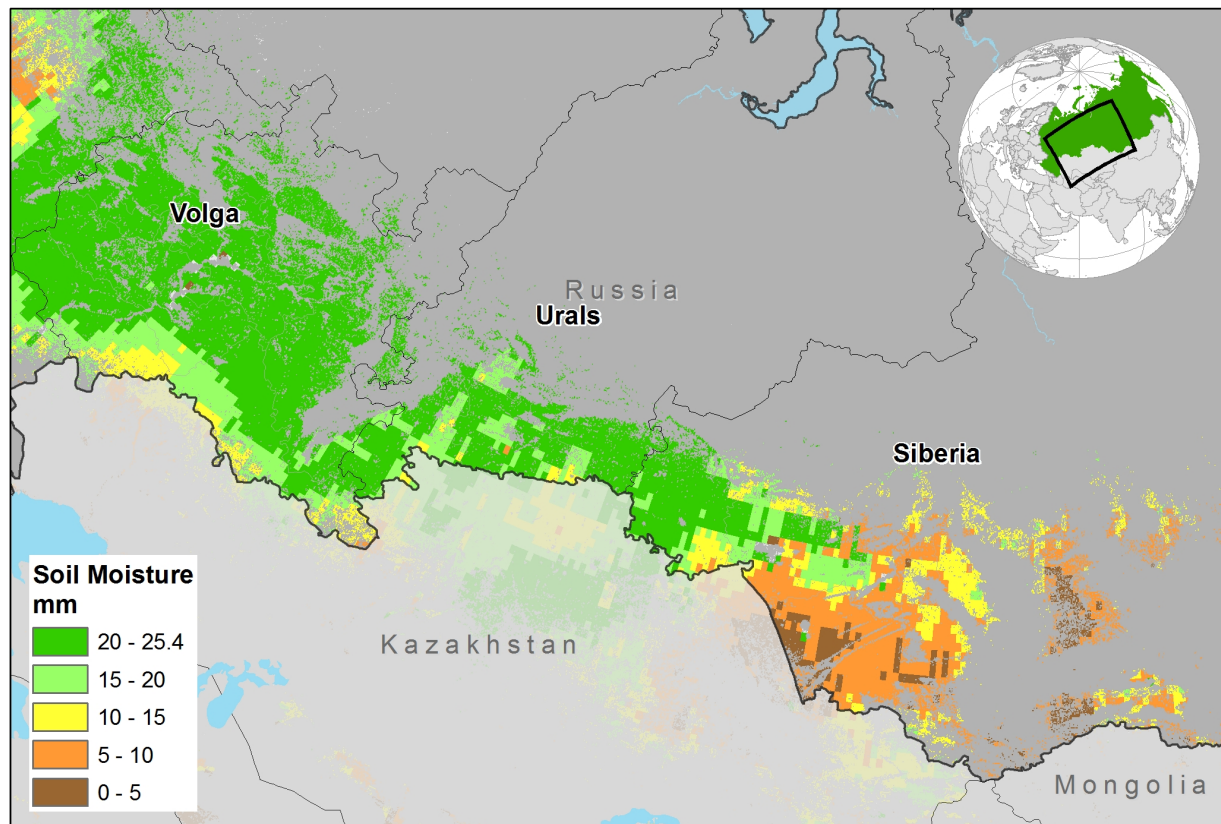


Figure 8: Surface Soil Moisture for Planting Spring Wheat

Russia: Surface Soil Moisture (April 29 - May 1, 2020)



NASA / Soil Moisture Active Passive (SMAP)
IIASA-IFPRI Hybrid Crop Cover (2015)

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Current area and production estimates for grains and other agricultural commodities are available on IPAD's Agricultural Production page:
[Crop Explorer https://ipad.fas.usda.gov/cropexplorer/](https://ipad.fas.usda.gov/cropexplorer/)or

Production, Supply and Distribution Database (PSD Online):
<http://apps.fas.usda.gov/psdonline/psdHome.aspx>

Area, yield, and production estimates for Russia winter wheat and spring wheat are available on PSD Online. Select "Downloadable Data Sets" and open the zipped file for "Russia Wheat; Winter/Spring Area & Production"

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