United States Department of Agriculture

Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division
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Commodity Intelligence Report

Russia: Seasonal Summary for the 2020/21 Season

Russia finished harvesting the final crops for the market year (MY) 2020/21 season in early December. Overall, Russia had an above-average season, with several crops hitting record or near-record production. This was due, in part, to favorable weather and growing conditions throughout both the Central and Volga Districts, which boosted yields for both winter and spring crops in those areas. The introduction of improved seed varieties throughout Russia helped to boost yields further.

Based on the preliminary crop production estimates from the Russian statistical agency Rosstat, Russian crops had an exceptional year. USDA estimates that a record was set for the production of wheat at 85.3 million metric tons (mmt), which is Russia's largest crop, and rapeseed at 2.5 mmt, which is a relatively minor crop. Near record crops were reported for corn (14.0 mmt), sunflowers (13.5 mmt), and soybeans (4.3 mmt). Rosstat typically releases preliminary data at the end of December followed by final data in March. Generally, the Rosstat data for wheat remains unchanged from the preliminary data to the final data. For corn and sunflowers, however, there tend to be differences between the two Rosstat reports.

Wheat:

Russia produces two wheat crops: winter wheat that is grown in European Russia (including the Southern, Central, Volga, and North Caucasus Districts), and spring wheat that is mostly grown in the Volga, Urals, and Siberian Districts (see Figures 1 and 2). Russian wheat production for 2020/21 is estimated at 85.3 mmt and the estimate includes 59.8 mmt of winter wheat and 25.5 mmt of spring wheat. USDA crop production estimates for Russia exclude estimated output from Crimea. Total wheat yield is estimated at 2.98 tons per hectare. Total area is estimated at 28.6 million hectares.

Weather conditions for the winter wheat crop were mixed across the main wheat growing districts throughout the season. The Central and Volga Districts had a bumper crop (see Figure 3). In contrast, the North Caucasus District suffered from dryness and production decreased relative to last year. Dryness in the Southern District—Russia's largest producing District—led to lower yields, but an increase in area more than made up for this decline. Large year-to-year increases in spring wheat production in the Siberian District were mainly driven by the increases in the Volga District, the only

District that grows a significant amount of both winter and spring wheat. Spring wheat yields have only slightly increased over the last few decades leaving room for strong growth potential. Russian analysts have noted that there has been a move in recent years to better harvesters and equipment, seed treatments (pre-sowing treatments), use of pesticides, and use of fungicides, which resulted in a record yield for spring wheat this season.

Corn:

Corn is produced in the Central, Southern, North Caucasus, and Volga Districts (see Figure 4). Corn production for the MY 2020/21 season is currently the third highest on record. This increase in production was largely driven by the second highest area on record. Favorable weather in both the Central and Volga Districts helped to boost production. None of the main corn growing districts, however, reported yields higher than last year's records (see Figure 5). In the Central District, the use of new crop rotation patterns, better seed varieties, and increased use of fertilizers and pesticides all have the potential to increase yields for corn in the future.

Corn production typically increases between the preliminary Rosstat report and the final report by about 0.65 mmt on average (see Figure 6). This increase is largely driven by area differences since the reported yields normally do not change much from report to report.

Oilseeds:

Russia grows three types of oilseeds: sunflowers (13.5 mmt), soybeans (4.3 mmt), and rapeseed (2.5 mmt). Area for sunflowers, rapeseed, and soybeans has increased over the years due to the increased profitability of oilseeds as compared to grain crops. This article will focus on sunflowers since they are the largest of the oilseed crops. Sunflowers are grown predominantly in the Volga, Southern, Central, and North Caucasus Districts (see Figure 7).

For sunflowers, the preliminary Rosstat data historically underestimates the final Rosstat data by about 0.25 mmt and the difference exists in harvested area, similar to corn (see Figure 8). Total yield is down from last year's record by 13 percent, largely based on year-to-year declines in all of the top producing Districts. However, record area was reported, which led to the second highest output on record.

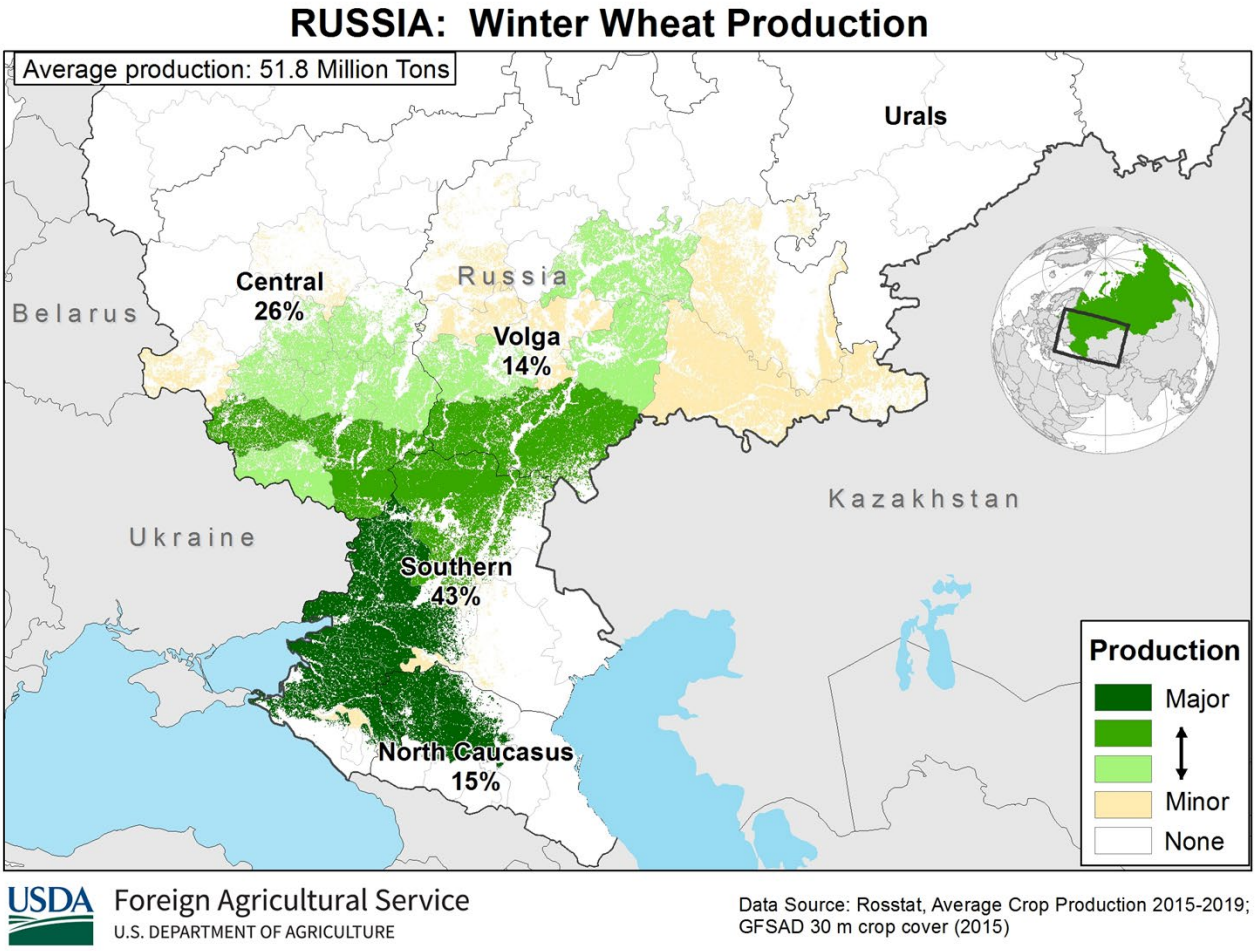


Figure 1. Average Russia Winter Wheat Production (2015-2019)

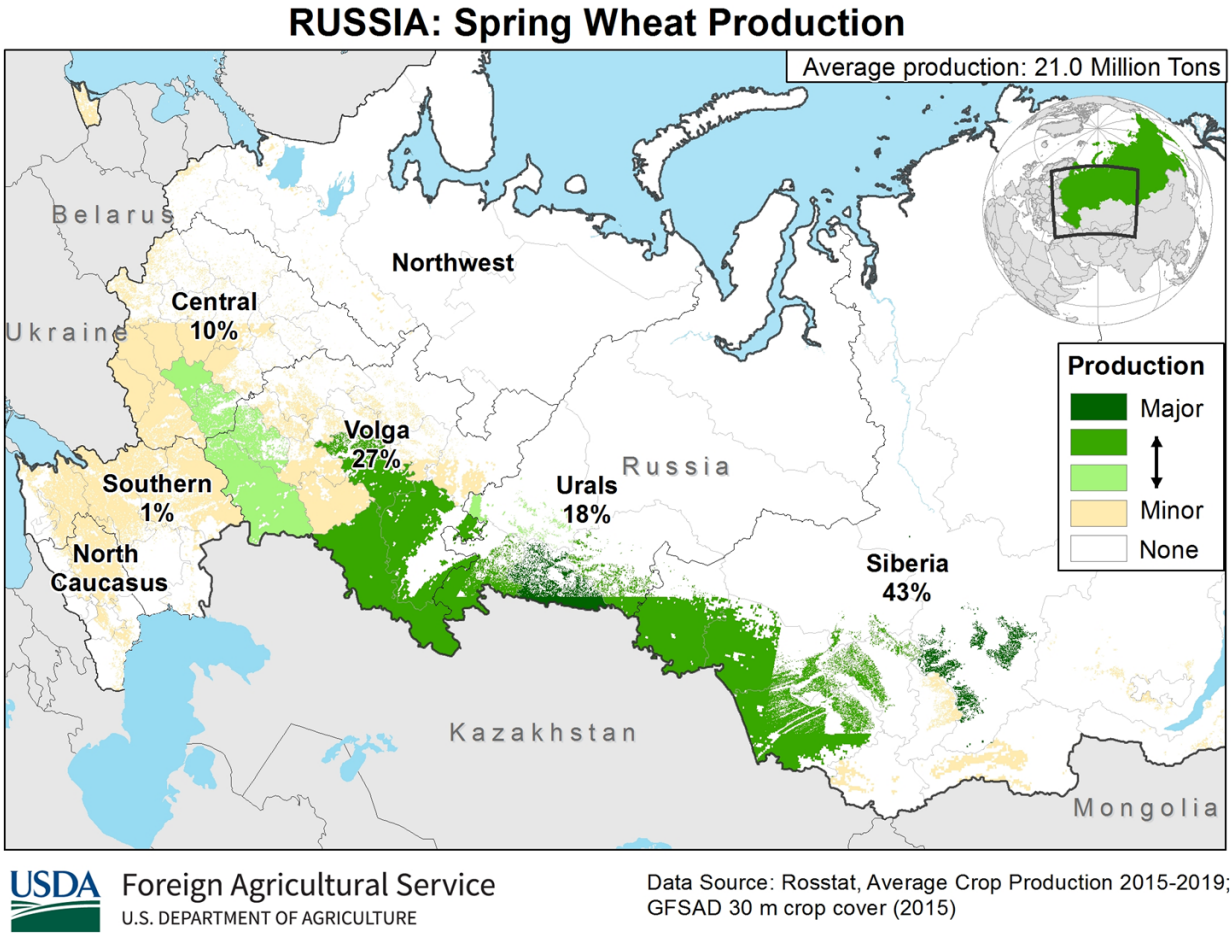


Figure 2. Average Russia Spring Wheat Production (2015-2019)

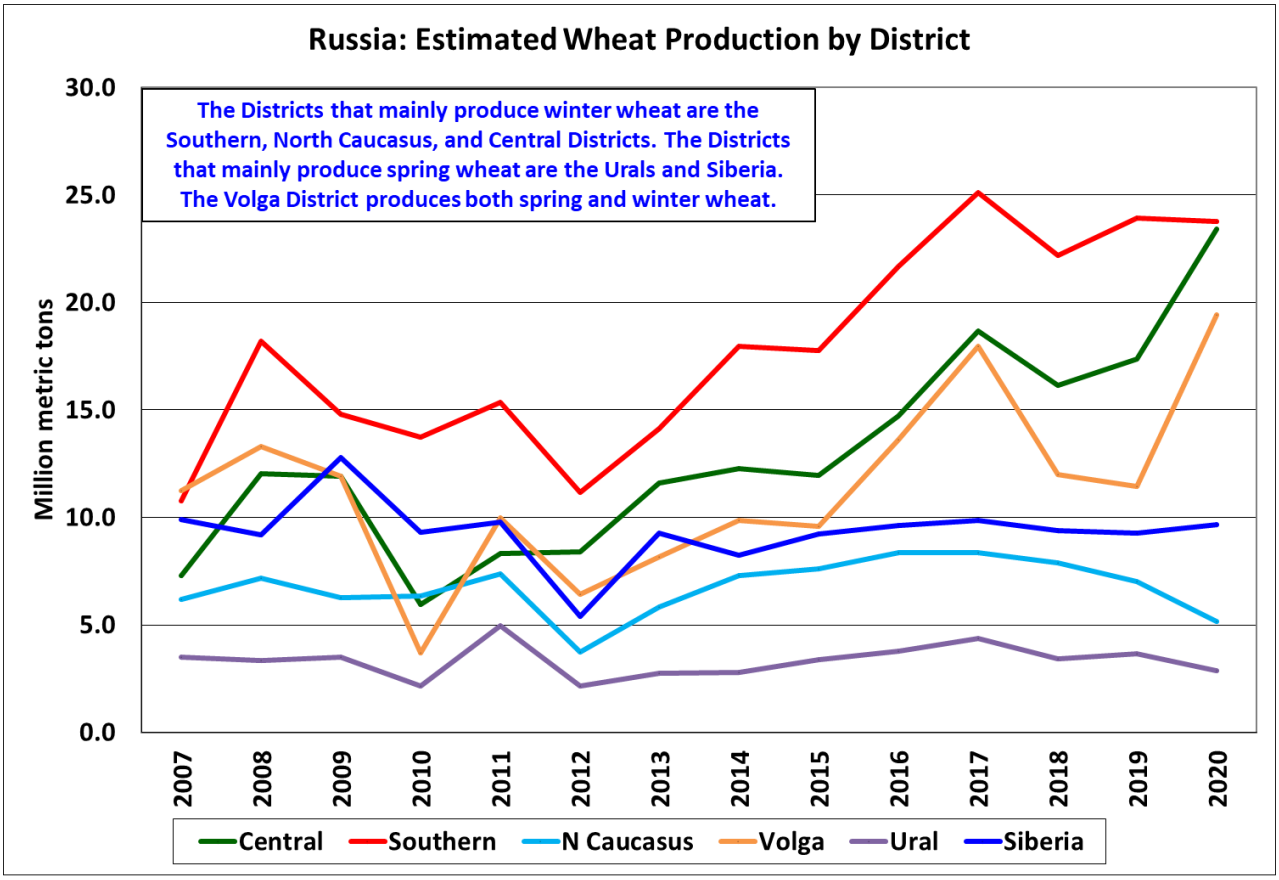


Figure 3. Russia Total Wheat Production by District

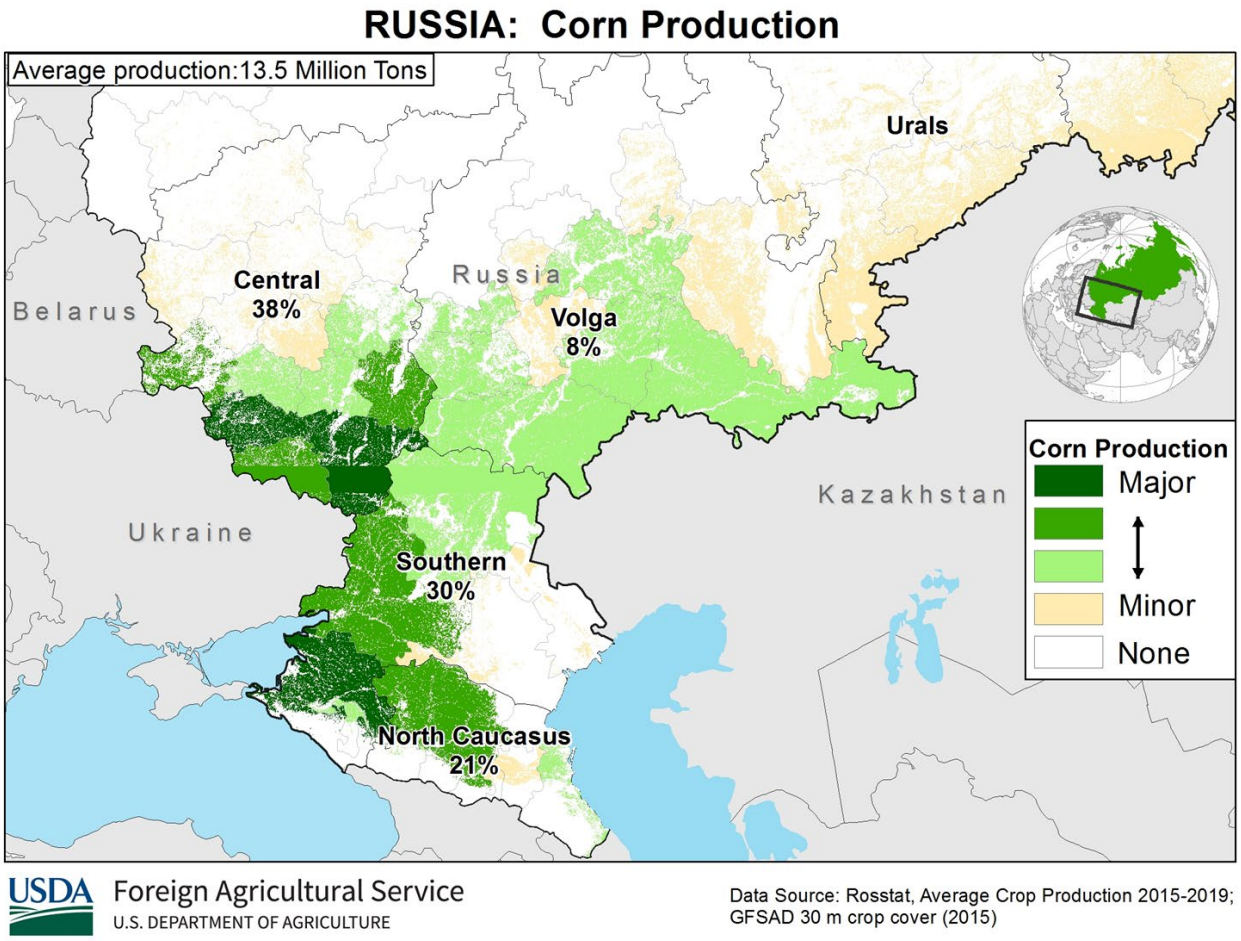


Figure 4.Average Russia Corn Production (2015-2019)

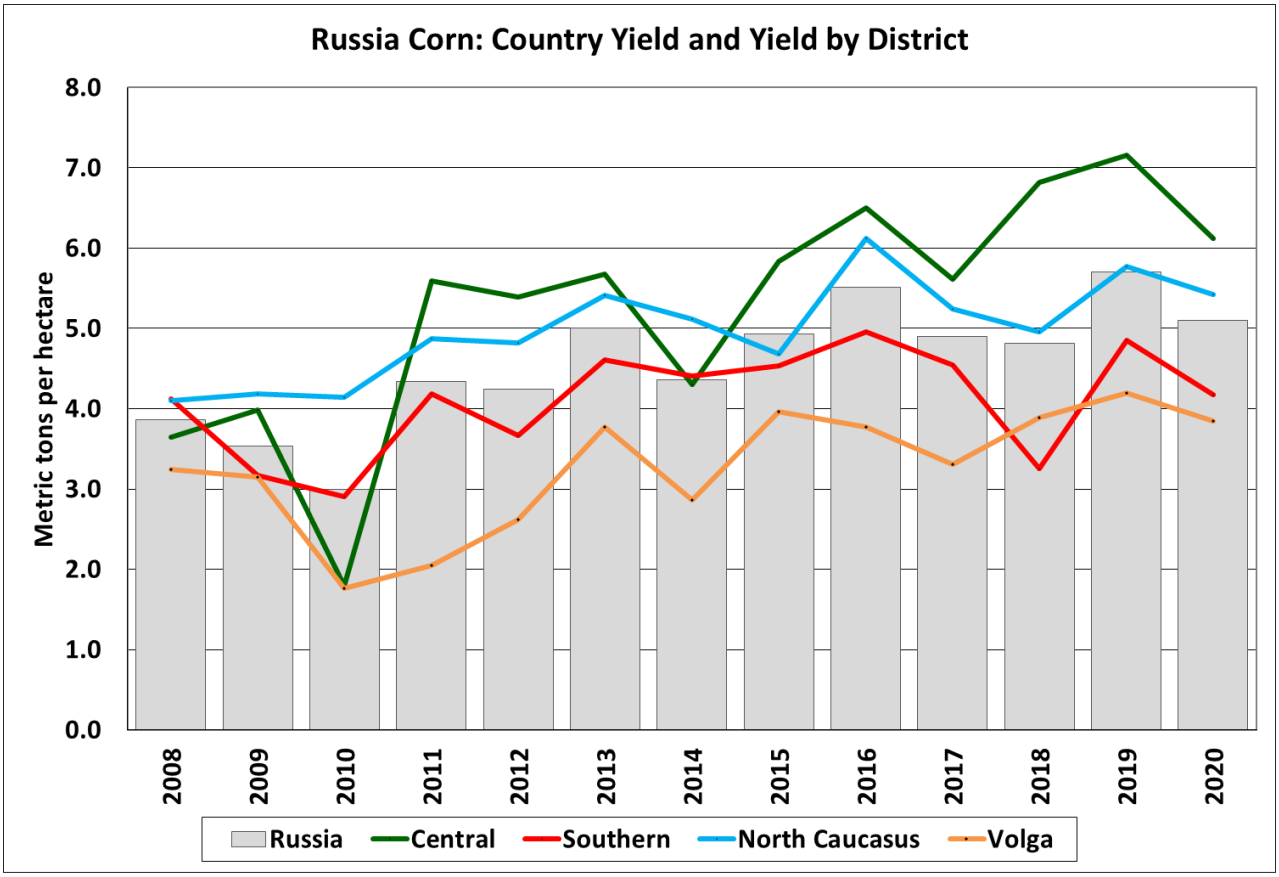


Figure 5. Russia Corn Yield by District

Figure 6. Russia Corn Production Comparison Between the Preliminary Rosstat report and the Final Rosstat report

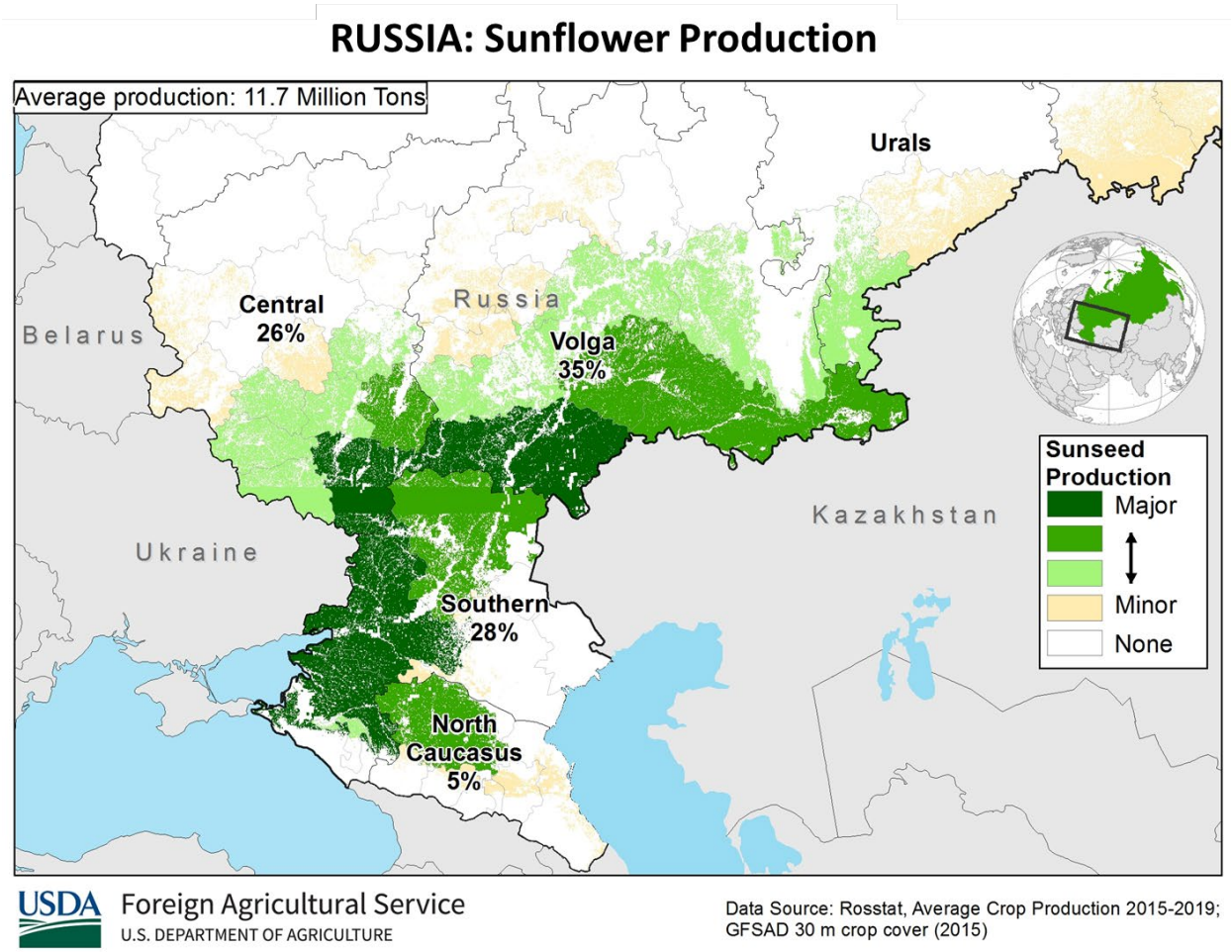
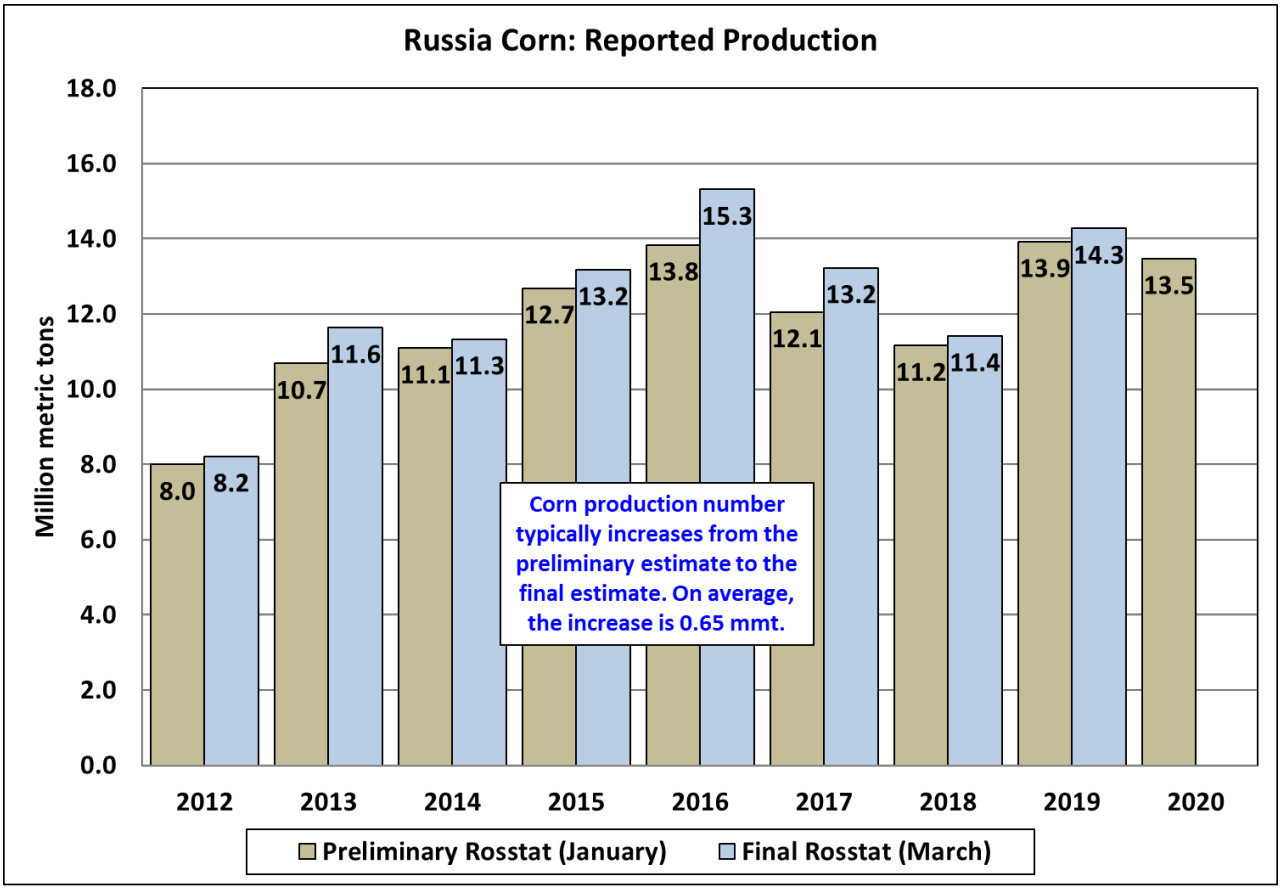


Figure 7. Average Russia Sunflower Production (2015-2019)



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Source: Rosstat

Figure 8. Russia Sunflower Production Comparison Between the Preliminary Rosstat report and the Final Rosstat report

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