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Commodity Intelligence Report

Russia Wheat: MY 2025/26 Outlook

Russia wheat production for marketing year (MY) 2025/26 is forecast at 83.0 million metric tons (mmt), up 2 percent from last year, but down 3 percent from the 5-year average. The forecast includes 59.0 mmt of winter wheat and 24.0 mmt of spring wheat. USDA crop production forecasts for Russia exclude estimated output from Crimea. Total wheat yield is forecast at 3.05 tons per hectare, up 4 percent from last year and 2 percent from the 5-year average. Total harvested area is forecast at 27.2 million hectares (mha), down 2 percent from last year and 4 percent from the 5-year average.

Winter Wheat

Total wheat in Russia, on average, is comprised of 70 percent winter and 30 percent spring (Figure 1). The winter crop is predominantly cultivated in the European part of the country, which encompasses the most productive and fertile agricultural lands. The bulk of the winter crop is planted during the months of September and October. The winter sowing campaign usually begins in late August in the Volga Valley and advances southward with the North Caucasus District being planted last in early November. Harvest typically begins in late June in the southern growing regions and progresses northward towards the Volga District, where it concludes around mid-August.

According to the Russian Ministry of Agriculture (MinAg), as of December 2024, Russian farmers planted 17.6 mha of winter crops compared to 18.6 mha the year before (Figure 2). The country's final planted area numbers for all crops are published by the Russian Statistical Agency, Rosstat. Typically, Rosstat's final numbers, expected to be released sometime during the summer, are higher than the December MinAg numbers. The main winter crops are wheat, barley, rye, and triticale. Currently, wheat accounts for about 90 percent of the total winter grains planted area.

Overall, planting this season occurred under challenging conditions. The planting campaign began in late August and early September after several months of dryness. During the month of September, precipitation was the lowest on record since 1981 (Figure 3) and maximum temperatures across the European part of Russia remained substantially above average (Figure 4). The unfavorable September weather conditions further exacerbated the dryness and depleted the existing short soil moisture reserves. Precipitation during October and November was sporadic, limited in terms of amount, and insufficient to provide adequate moisture for the newly planted crop (Figure 5). Thus, the prevalent dryness hampered planting and emergence. As a result,

establishment conditions in late fall were below average across all major winter grains producing regions (Figure 6). Based on the Russian Hydrometeorological Service (Roshydromet), nearly 37 percent of the winter crops went dormant in poor condition.

January, February, and March did not bring any extreme weather events. Overall, above average temperatures during December and January caused reduced snow cover this season compared to last year, but timely snowfall events provided needed protection for the winter crops during the periods of bitter cold (Figure 7). The European part of Russia experienced large temperature fluctuations during the winter and early spring months. Temperatures were mild and above average until the end of January; cold and below freezing temperatures spread throughout the European part of Russia in February. March returned to warm weather, which continued until early April, when part of the winter wheat growing regions experienced freezing temperatures again. The latter, however, did not cause significant crop damage to the re-emerging winter wheat, which broke dormancy between 10 days and two weeks ahead of normal. At the time, Roshydromet reported that the share of crops in poor condition had dropped to 5 percent, which is near the average (Figure 8). USDA adjusted the MinAg planted area figure for this expected loss due to reported winterkill.

Currently, winter wheat is between heading and flowering across the southern growing districts and near joining further north around Voronezh. Precipitation has improved since crops broke dormancy and the Standardized Precipitation Index (SPI) illustrates reduction in areas previously classified as extreme and severe drought (Figure 9). Soil moisture reserves, however, are still below average (Figure 10), which pose a challenge as crops are nearing flowering and filling. Thus, the weather for the remaining part of May and during June will be crucial.

Spring Wheat

Russia's spring wheat belt is located along the border with Kazakhstan, with Siberia, the Urals, and Volga being the key producing districts (Figure 1). The bulk of the spring crop is planted in April and May; harvest typically begins in August. According to MinAg's planting intentions report, about 12.3 mha are expected to be sown with spring wheat this season. As of May 16, 4.7 mha of spring wheat has been planted compared to 4.1 mha last year during the same period. At present, overall soil moisture conditions are favorable and there are no weather concerns that may negatively impact the ongoing planting campaign or crop development across the spring wheat growing areas (Figure 10).

The recently re-emerged winter wheat and the newly planted spring wheat face some possible weather-related challenges, including soil moisture shortage and lack of adequate precipitation across the European part of Russia. Recent online resources report persistent dryness in many key regions, including Rostov. Thus, Russia's wheat growing areas need more favorable and consistent growing conditions going forward, especially during the key yield formation periods for both winter and spring wheat.

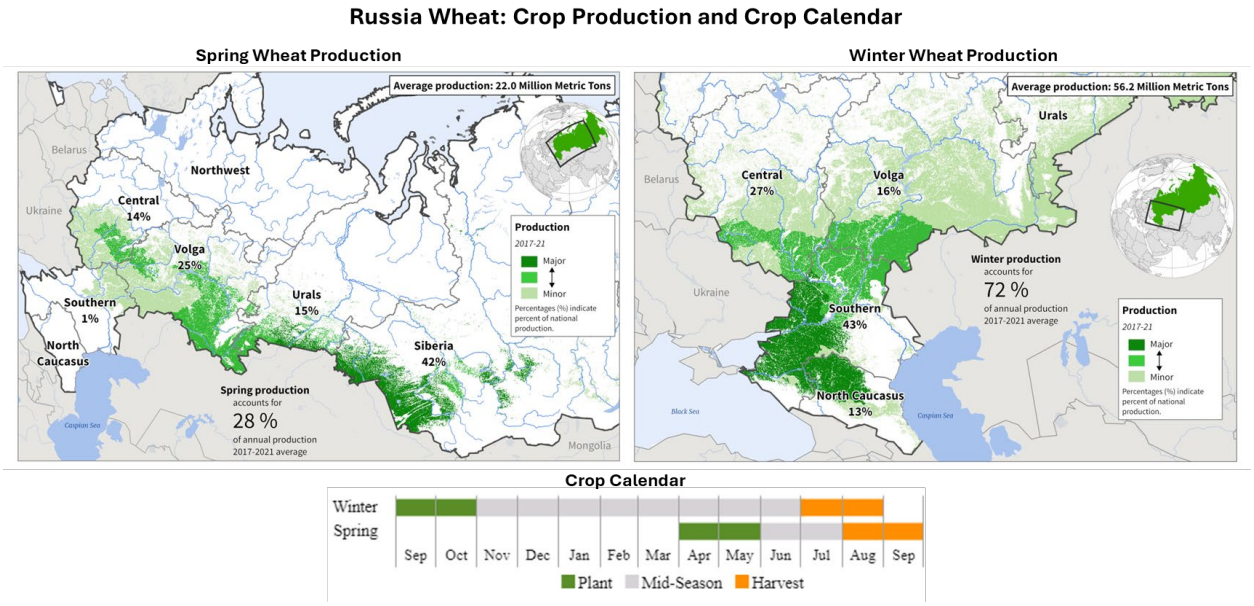


Figure 1. Russia wheat: crop geography and crop calendar. Source: Russia's Statistical Agency, Rosstat (2017-2021) and GFSAD 30 m crop cover (2015).

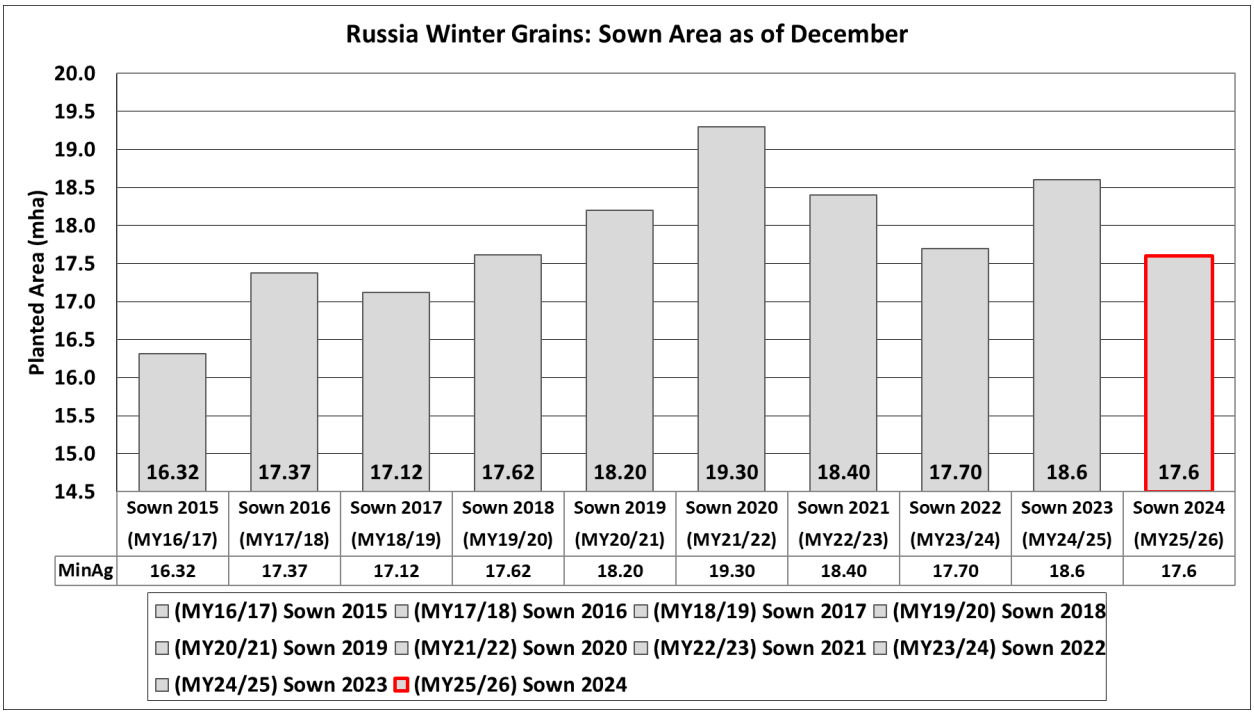


Figure 2. Russia: sown area with winter grains as of late December (after the winter grains planting campaign is over). Source: Ministry of Agriculture of Russia.

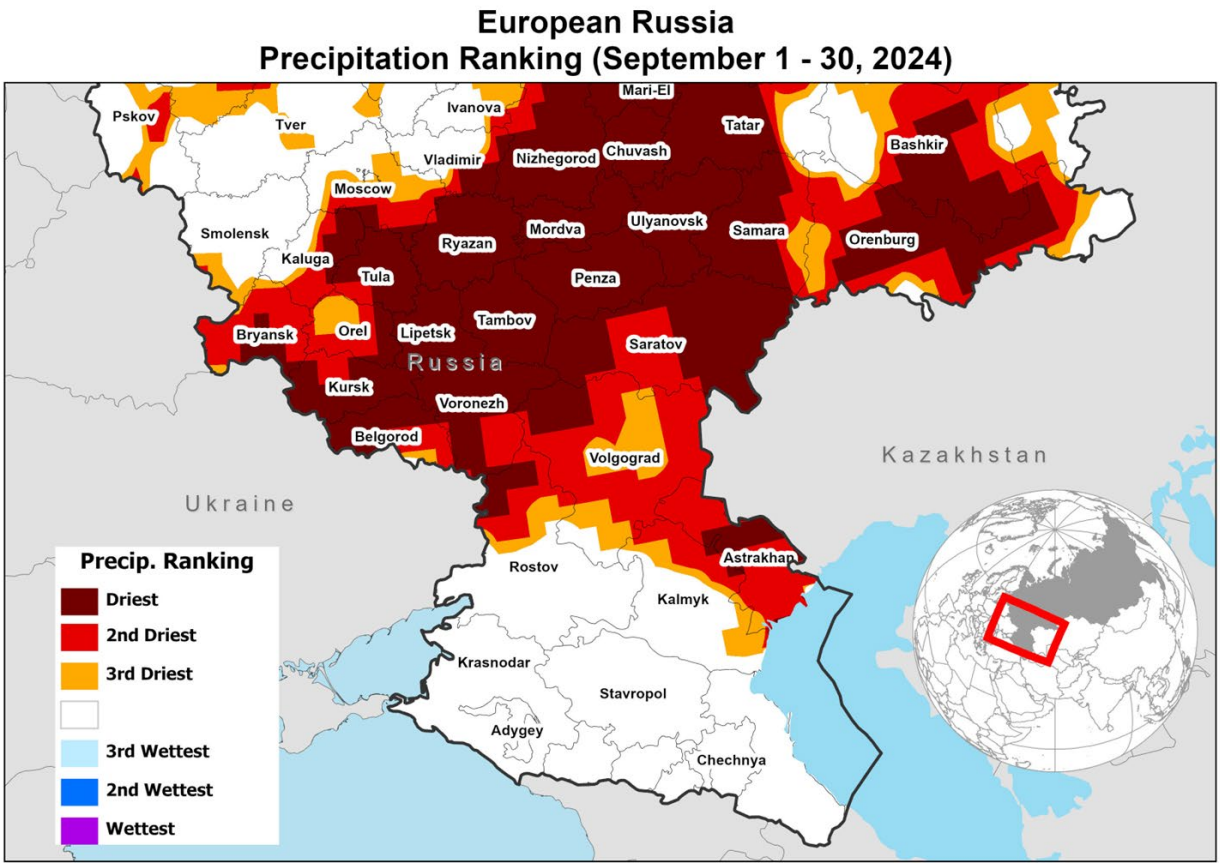


Figure 3. Russia: Precipitation ranking since 1981 for the month of September 2024 across the European part of Russia. Source: NOAA CPC.

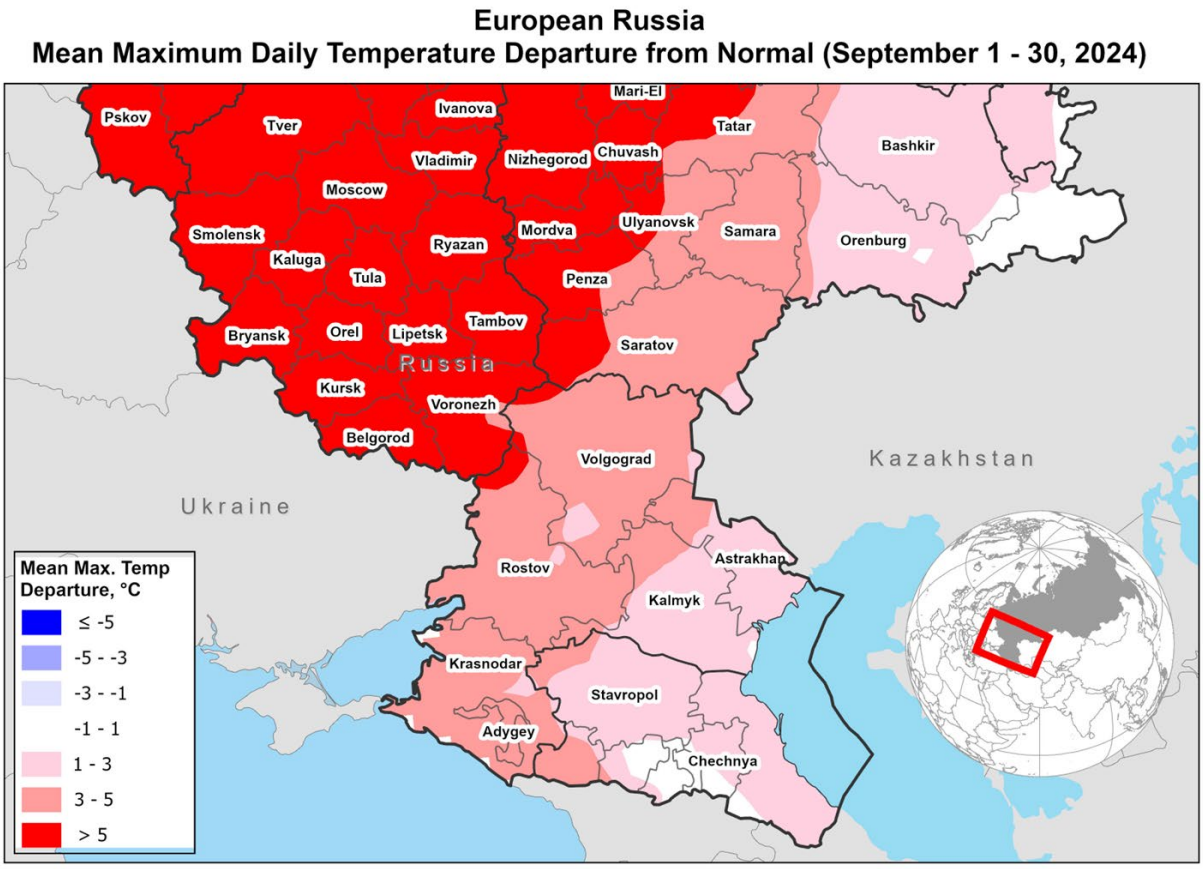


Figure 4. Russia: Mean maximum daily temperature departure from normal for the month of September 2024 across the European part of Russia. Source: NOAA CPC.

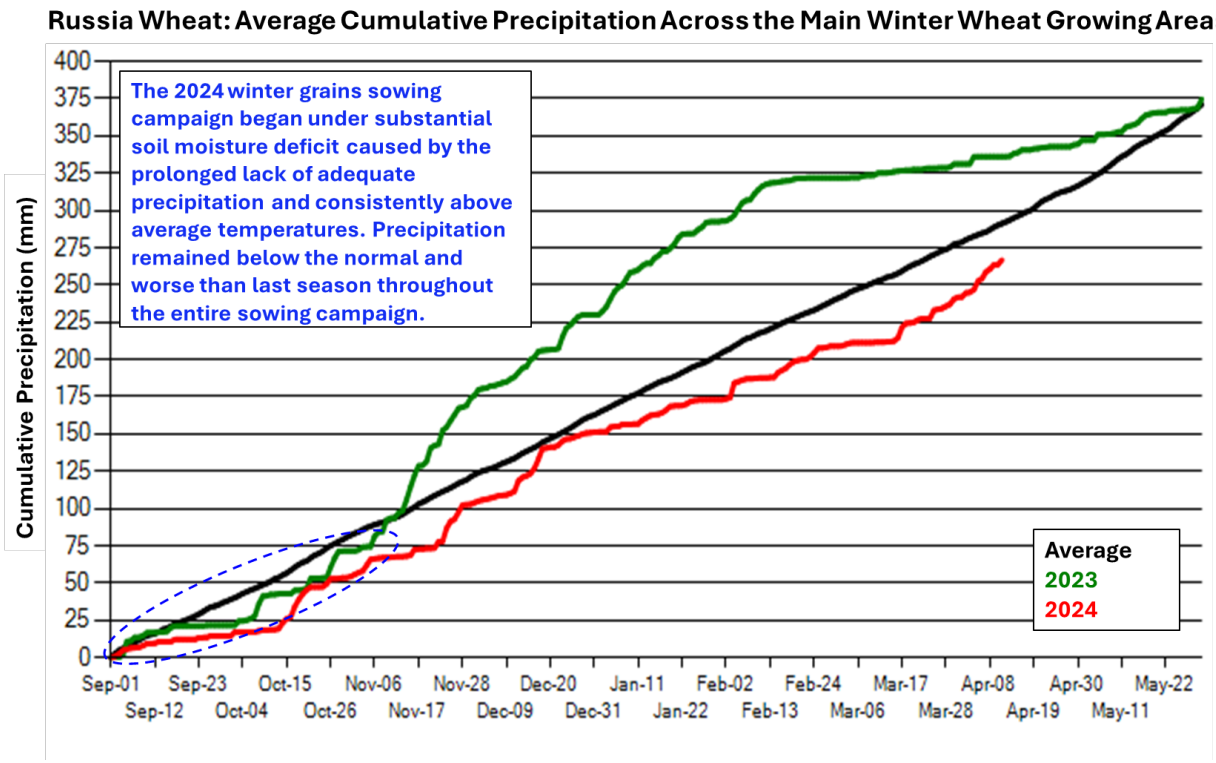


Figure 5. Russia: Average cumulative precipitation across the main winter wheat growing areas. Source: WMO.

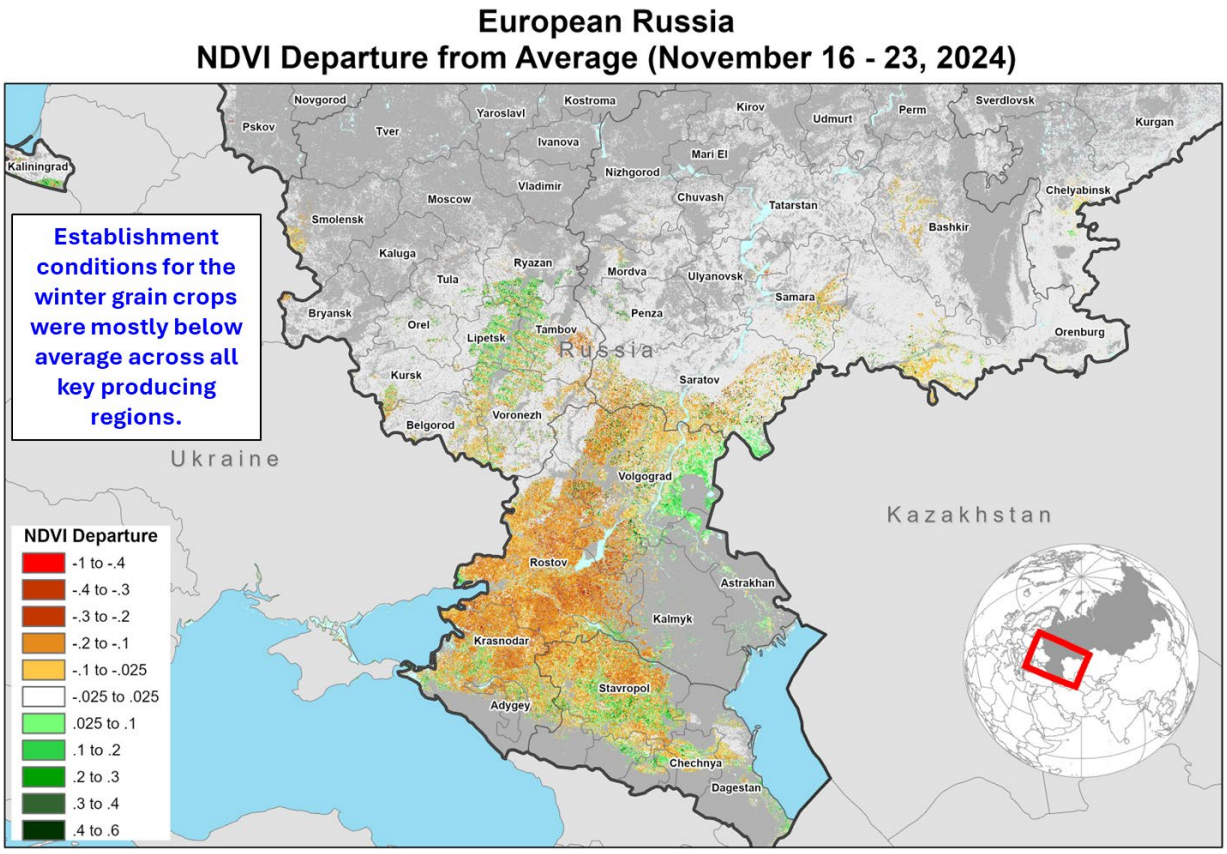


Figure 6. Russia: Normalized Difference Vegetation Index (NDVI) departure from normal from late November 2024. The map suggests below average emergence conditions across all major winter wheat growing regions. Source: MODIS and GFSAD 30 m crop cover (2015).

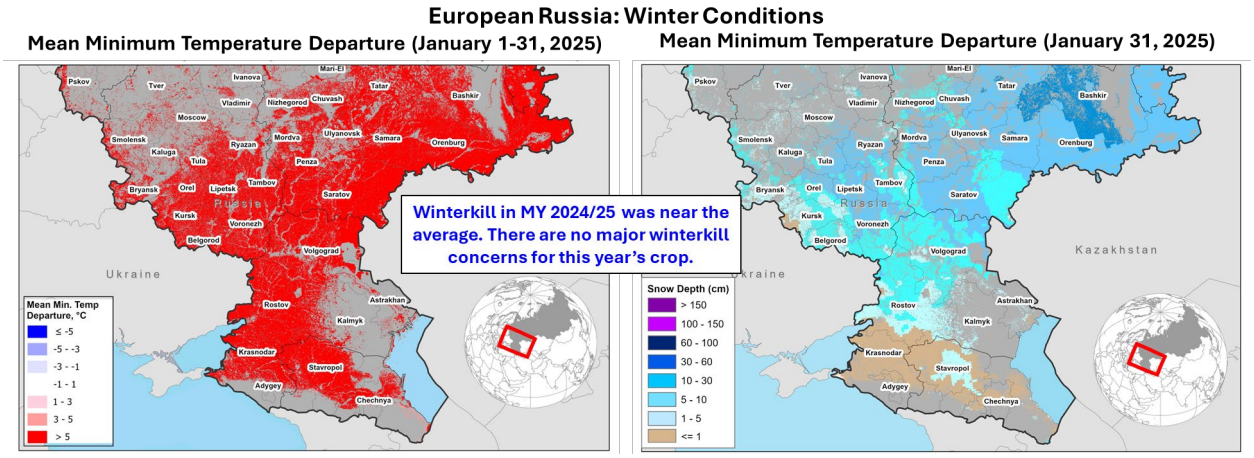


Figure 7. Russia: Mean minimum temperature departure data and snow cover information suggest favorable winter conditions and low winterkill rates this season. Source: WMO, USAF 577th WW, and GFSAD 30 m crop cover (2015).

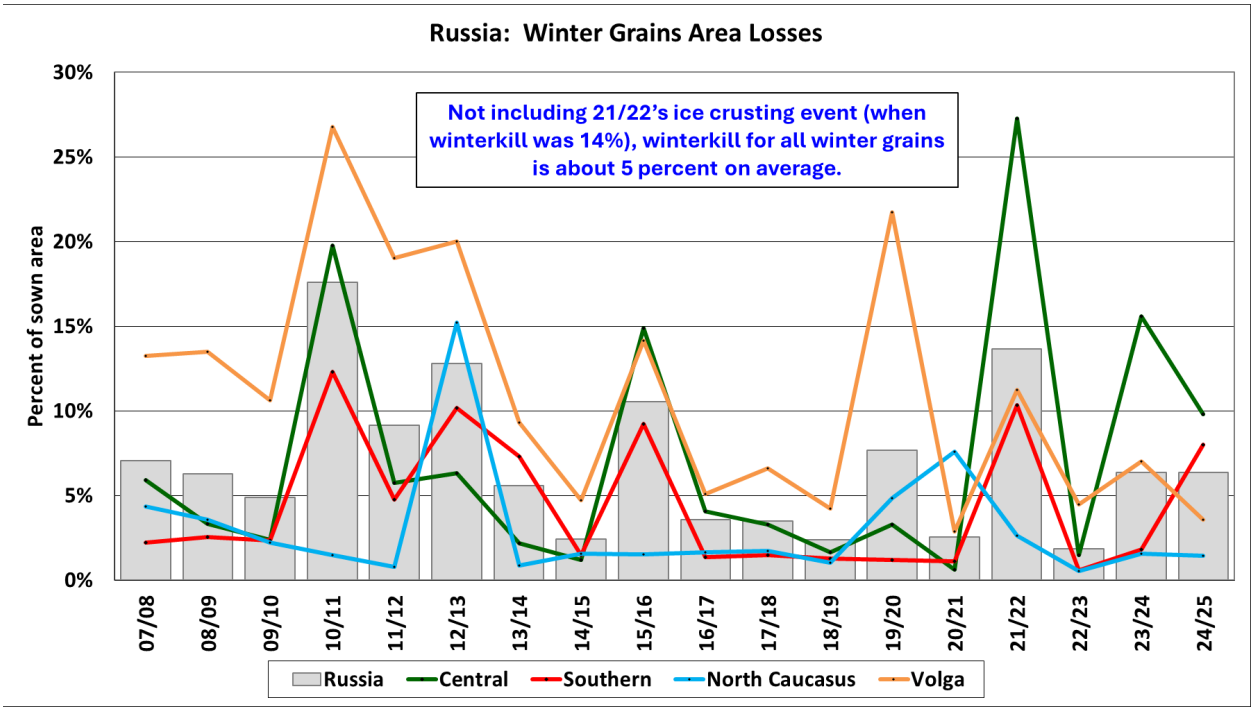
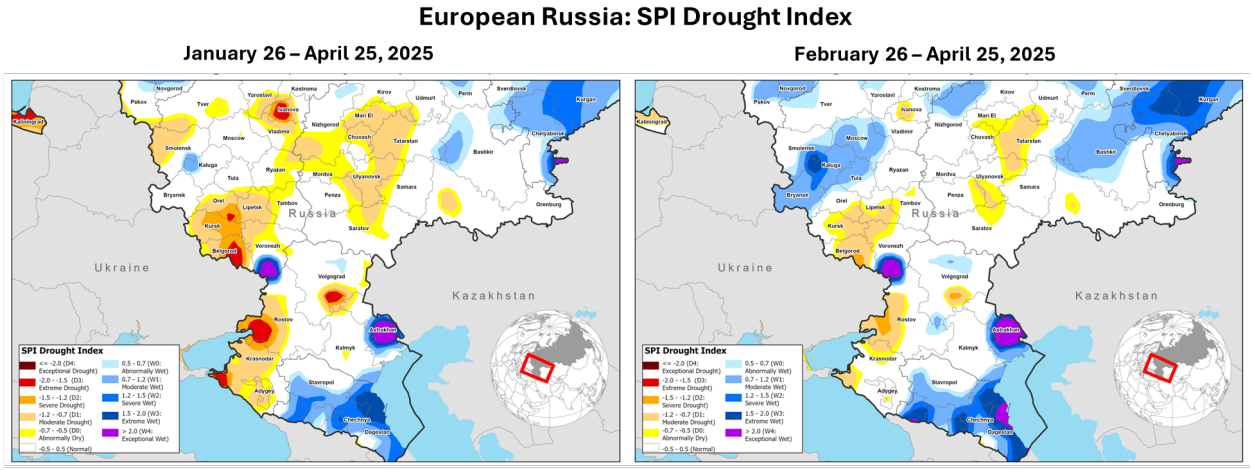


Figure 8. Russia: Average winter-grains area losses. Source: Rosstat.



Red and orange colors in the 3-month SPI maps indicate areas of dryness associated with long-term below-average precipitation. The dryness was partially elevated by the rainfall that fell in March and April (supported by the reduction of D2 and D3 categories in the 2-month SPI). Soil moisture reserves, however, across the key winter wheat growing areas are still below average, which pose a challenge as crop is nearing flowering and filling, which are key yield formation stages. Thus, the whether during the remaining part of May and June will be critical.

Figure 9. Russia: Standardized Precipitation (SPI) drought index. Source: NOAA CPC.

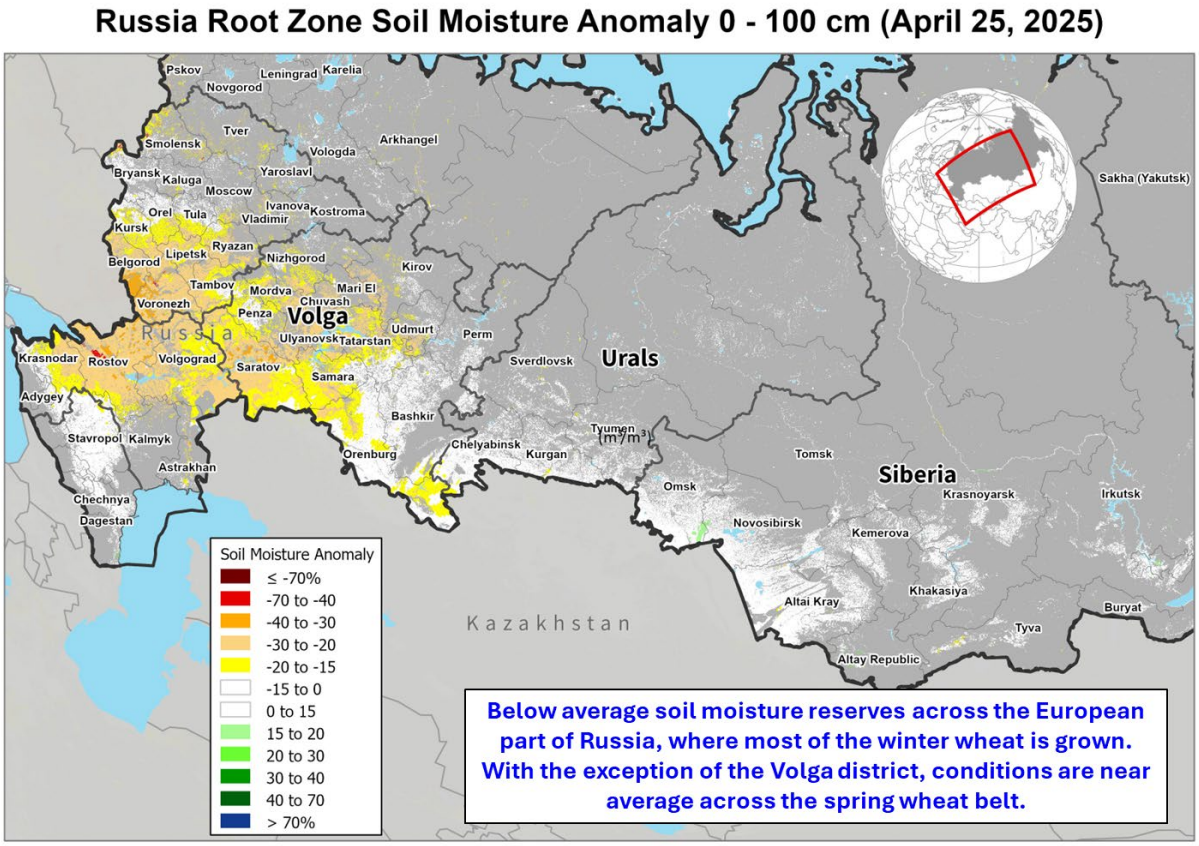


Figure 10. Russia: Spatial variability in soil moisture. Source: SMAP and GFSAD 30 m crop cover (2015).

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