USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division
Web: https://ipad.fas.usda.gov

September 26, 2025

Commodity Intelligence Report

Russia Wheat: General Review

Overview And Long-term Variability

Russia produces two wheat crops per year (Figure 1). The winter portion of the crop accounts for about 70 percent of total production and is predominantly cultivated in the European part of the country. The remaining 30 percent, which is planted in the spring, is mainly grown in the regions bordering Kazakhstan, including Siberia, the Urals, and Volga.

Russia plays a key role in the global wheat market. It is currently the world's top wheat exporter and the 4th largest wheat producer, after China, the European Union, and India. Russia produces about 10 percent of the world's wheat (Figure 2). Domestically, wheat is also Russia's top agricultural commodity, which currently accounts for about 70 percent of the total major grains produced in the country (Figure 3).

At present, Russia's wheat production is at its historical highest level (Figure 4). The most recent 5-year (2020-2024) average production has doubled relative to the start of the century and is up 73 percent compared to just 10 years ago.

Figure 5 captures the 5-year average area and yield along with the rate of change based on the 5-year average. Overall, harvested area has increased by 27 percent compared to 59 percent for yield. The current marketing year (MY) 2025/26 estimate is excluded from the average calculations as the year is not yet complete. Thus, as Figure 5 demonstrates, the production increase is largely yield-driven and can only partially be attributed to area expansion. The rate of change in area is generally smaller and does not exceed 16 percent (Figure 5, I.B) compared to the rate of change in yield, which reaches 33 percent (Figure 5, II.B) between 2014 and 2019. By early 2000, area and yield both began to rebound. The growth was mostly due to technological changes and enhancements. This included wider access to government subsidies and financial support, improved and expanded market access, use of higher quality seed varieties, optimized fertilizer applications, introduction of modern machinery, and market opportunities, all of which consequently led to higher profitability. The latter, along with a better return on investment, motivated farmers to invest more in wheat production and expand area under wheat.

As indicated earlier, yields for both crops in Russia have steadily increased since 2000 (Figure 6). The winter crop, however, has shown a higher, nearly double, growth rate

(based on trend) compared to the spring crop. Generally, the winter crop offers a better yield return mostly due to its longer growing season. The 5-year average yield between 2000 and 2004 was 2.64 t/ha for the winter crop and 1.43 t/ha for the spring crop; both have gone up and the current averages are 3.82 t/ha and 1.96, respectively, leaving the yield gap nearly unchanged (table imbedded in Figure 6).

Figures 7 and 8 offer a view of the long-term yield and area variability and their deviation from the 5-year moving average for the total wheat crop since 2000. *Technology* (captured by a steady increase in trend or the 5-year average) and *weather* (captured by the deviation of the annual yield relative to trend or the 5-year average) are the two biggest yield drivers in Russia. Detrending or focusing on the deviation relative to the average allows us to offset the technology-induced change and mostly capture the weather impact on yield variability.

Several years are highlighted in Figures 7 and 8; these are examples of adverse weather impacts on yield formation and harvested area. In each of these instances the annual yield falls below the 5-year average line. In 2003/04, ice crusting caused about 30 percent loss in area. Wheat was further challenged by cooler spring temperatures, which delayed crop development, and dry and hot July weather. In MY 2010/11, fall dryness, January frosts, and ice crusting reduced harvest area. In addition, severe and persistent summer drought sharply reduced yields. In MY 2012/13, prolonged dryness and excessive heat hindered crop development resulting in both lower yields and high abandonment rates that year. In MY 2020/21, multiple ice crusting events that occurred during the months of February and March spiked the winterkill rates that year and lowered the yield potential of the winter crop. That same year, July heat and dryness challenged the spring crop across large parts of the central spring wheat growing areas.

Thus, frequent droughts, untimely excessive heat, late spring frost, and ice crusting are all major weather-related factors that most often impact the final end-of-season yield and harvested area in Russia.

MY 2025/26 Wheat Prospects

Currently, USDA’s estimate for Russia wheat for MY 2025/26 is 85.0 million metric tons (mmt), up 4 percent from last year. The estimate includes 61.5 mmt of winter wheat and 23.5 mmt of spring wheat. Total wheat yield is estimated at 3.21 t/ha, up 9 percent from last year. Total harvested area is estimated at 26.5 million hectares (mha), down 5 percent from last year.

Rosstat recently released its final planted area statistics for all crops to be harvested in 2025. Overall, year-over-year planted area went down from 16.1 mha to 15.8 mha and from 12.4 mha to 11.1 mha for the winter and the spring crops, respectively. This corresponds to about a 2-percent decrease for the winter crop and 10-percent decrease for the spring crop relative to last year. The planted area drop is due to poor weather and a shift by farmers to more profitable crops such as oilseeds. In addition, open-source articles state that Russia’s policy is to shift to domestic seeds use, which could

impose grain quality issues, in turn hampering returns and leading to even lower profit margins.

Winter wheat: After some challenging winter and early spring weather associated with dryness and early spring frost, growing conditions improved during the reproductive stages for the winter crop, leading to better yield prospects than last year (based on harvest data).

Spring wheat: The abundance of soil moisture and favorable temperatures since the start of the season prompted crop growth and boosted yield prospects for the spring crop. Based on satellite-derived Normalized Difference Vegetation Index (NDVI) data, current crop vigor is comparable to last season's spectacular conditions across the Volga, Urals, and Siberia Districts and substantially surpasses the near-average crop response in the Central District last year (Figure 9). At present, NDVI suggests optimal yields for this season's spring crop.

Lastly, the MY 2025/26 growing season has wrapped up, and the crop is currently being harvested. According to the Ministry of Agriculture (MinAg) of Russia, as of September 5, farmers have harvested 71.7 mmt in bunker weight from 19.1 mha, which is nearly 72 percent of total planted area. At this stage of the campaign, MinAg reports higher bunker yield compared to last year (3.76 t/ha vs. 3.39 t/ha). Reported MinAg output and yield includes Crimea. Open-source articles indicate that the harvest pace across Siberia and the Urals has been slow due to rainy weather. In addition, publications citing MinAg report higher starting yields than last season for Russia's spring wheat belt. Of note, last season's (MY 2024/25) yield for the spring crop was at a record 2.13 t/ha. The MY 2025/26 should be fully harvested by mid-October.

Russia Wheat: Crop Production and Crop Calendar

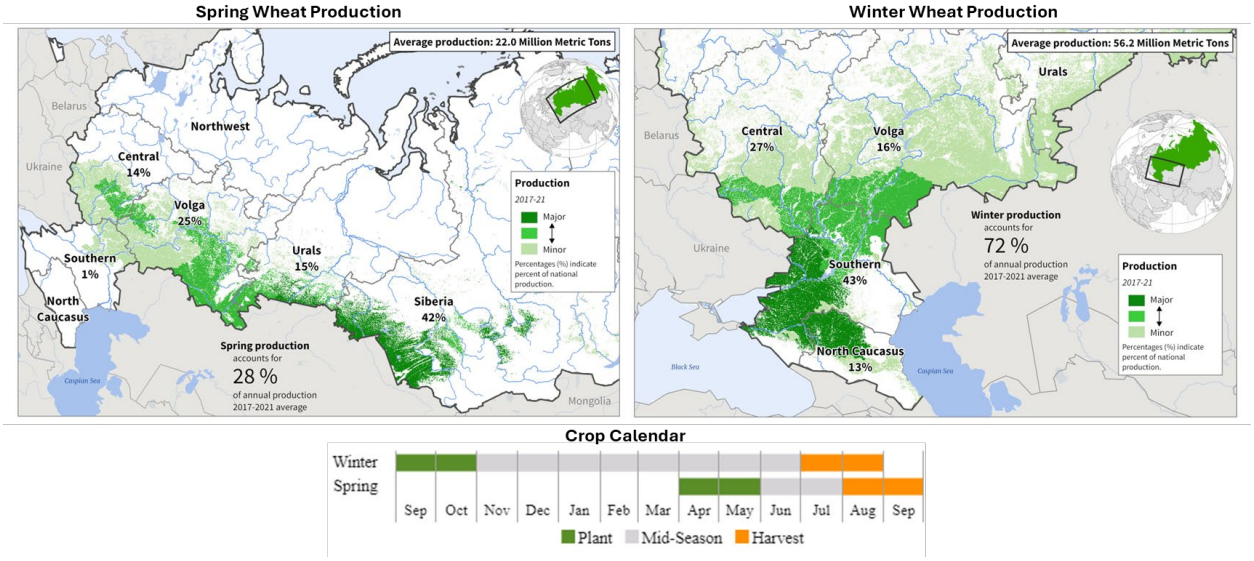


Figure 1. Russia wheat: crop geography and crop calendar. Source: Russia's Statistical Agency, Rosstat (2017-2021) and GFSAD 30 m crop cover (2015).

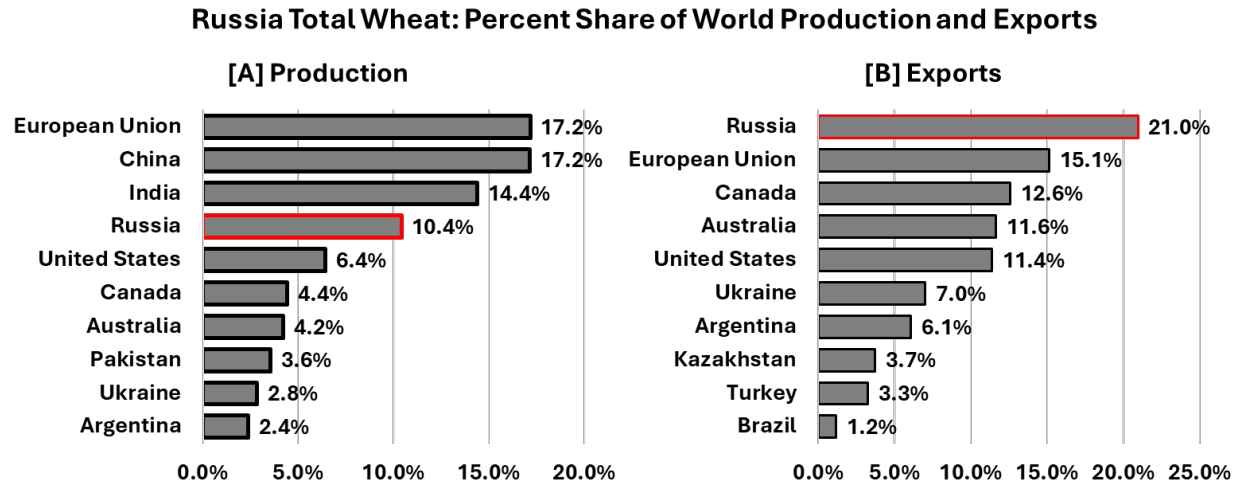
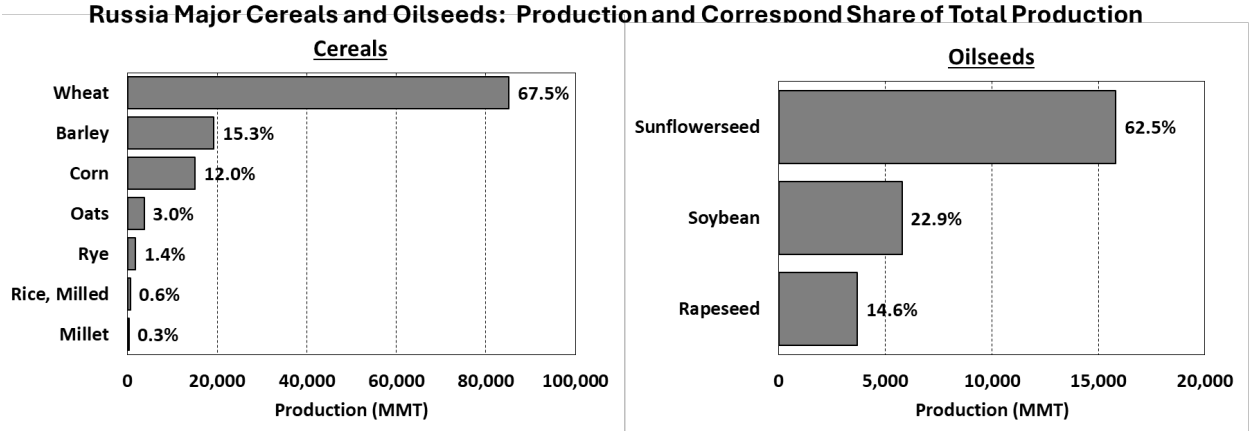
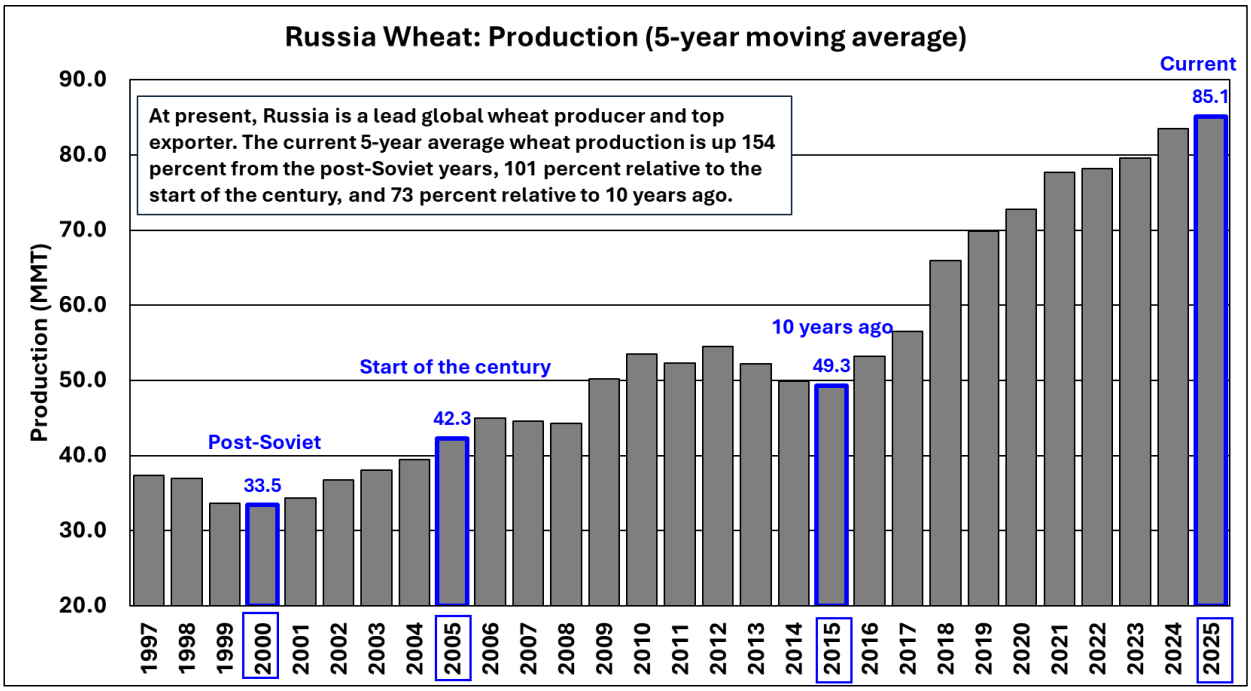


Figure 2. Russia total wheat: percent share of world production as of September 2025. Source: PSD Online.



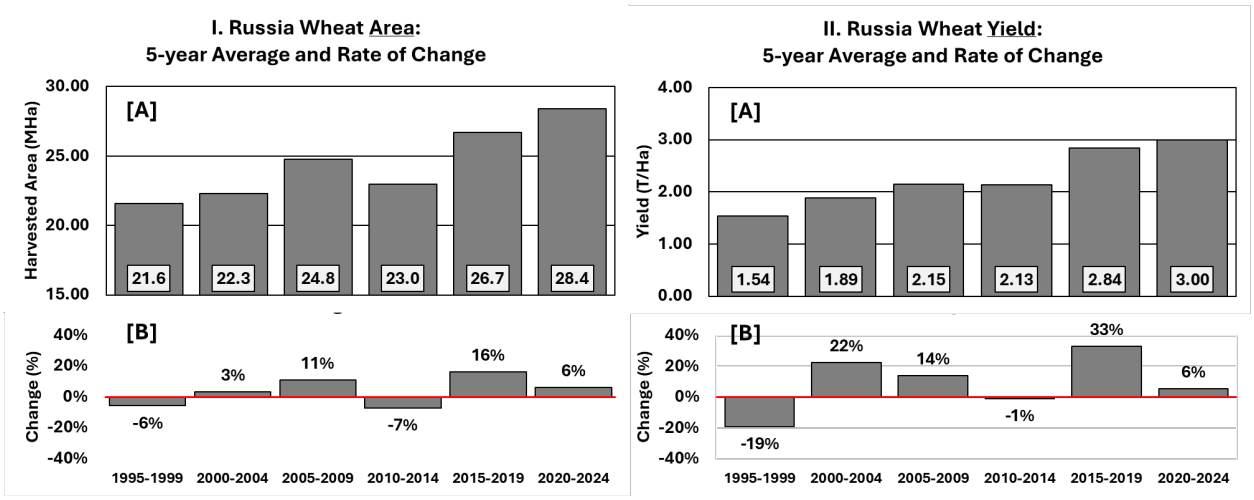
Note: Percent share of wheat, barley, corn, oats, rye, rice, and millet computed out of total grains production only. Percent share sunflowerseed, rapeseed, and soybean computed out of total oilseeds production only.

Figure 3. Russia MY 2025/26 production of major crops. Source: PSD Online.



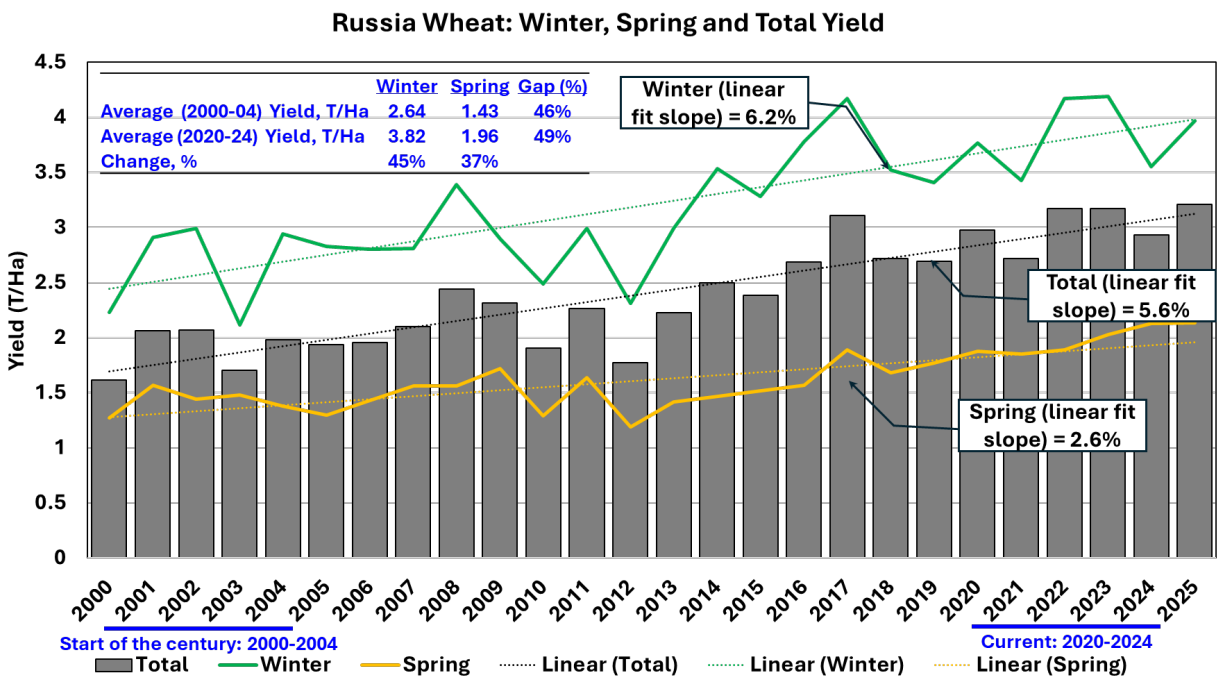
Note: the chart captures the 5-year moving average. Each bar represents that average from the previous 5 years, i.e., the average for 2025 was computed using the 2020 – 2024-time span. The MY 2025/26 estimate was not included in the computations as the year is not yet complete.

Figure 4. Change in Russia's wheat production based on the 5-year moving average. Source: PSD Online.



Note: the percent change was computed using the 5-year average area and yield estimated; it reflects the change relative to the previous 5-year average period, i.e., the 2005-2009 11 percent change indicates that the 2005-2009 5-year average area has increased by 11 percent relative to 2000-2004 . The MY 2025/26 forecast was not included in the computations as the year is not yet complete.

Figure 5. Russia wheat: 5-year average area and yield, and their corresponding rate of change. Source: PSD Online.



Note: The MY 2025/26 estimate was not included in the computations as the year is not yet complete.

Figure 6. Russia wheat: Overview of winter, spring and total yield. Source: PSD Online.

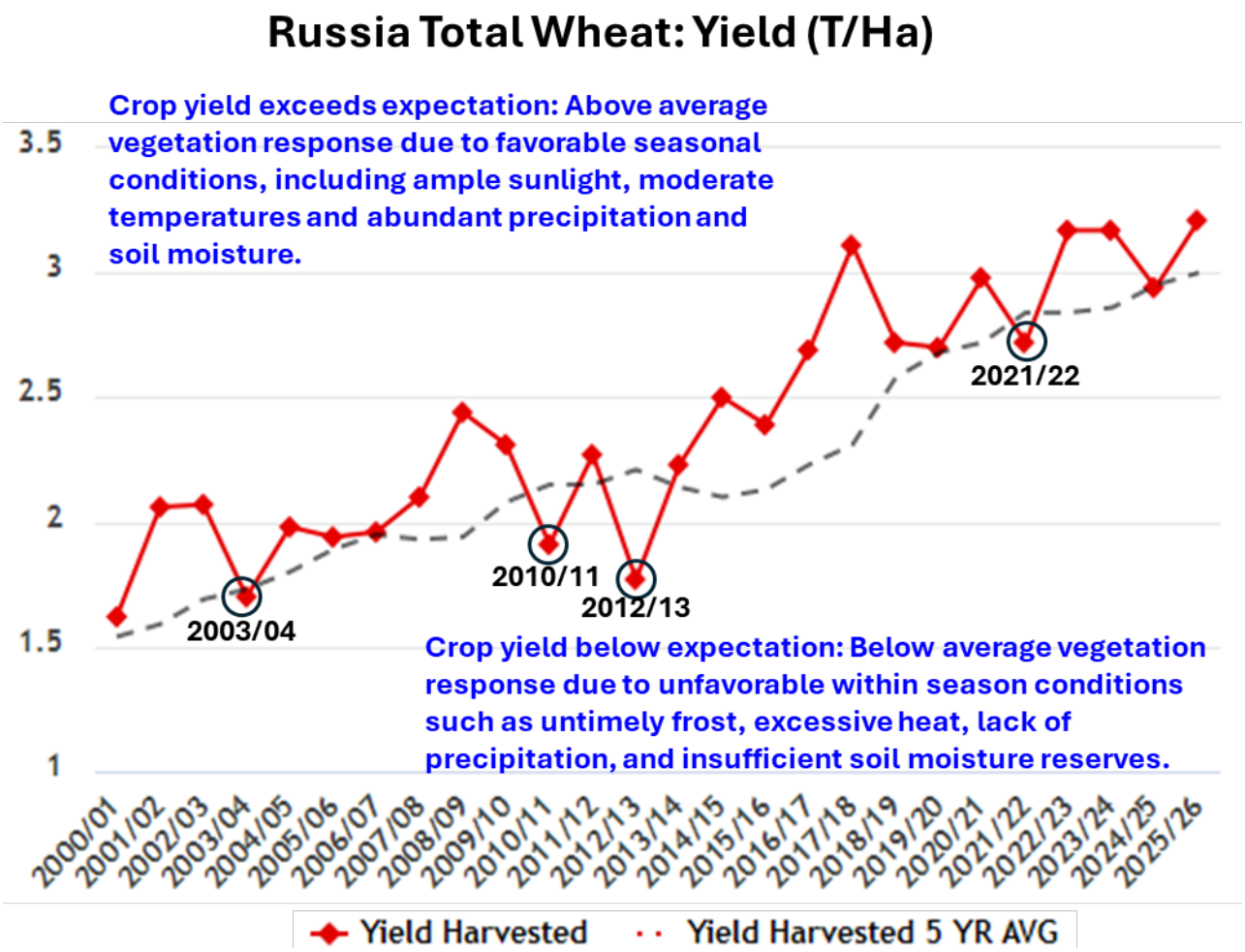


Figure 7. Russia wheat: Overview of total yield. Source: PSD Online.

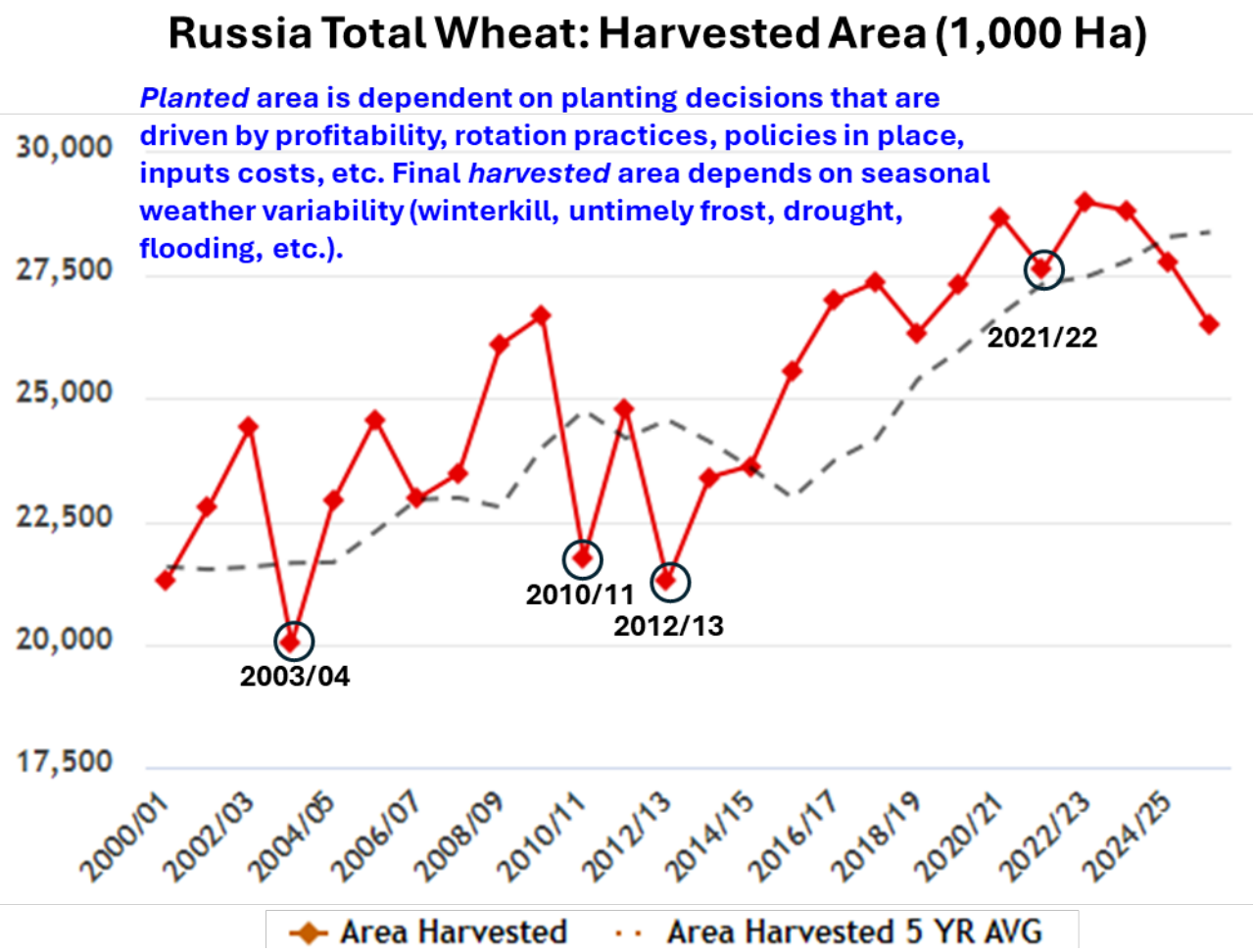


Figure 8. Russia wheat: Overview of total area. Source: PSD Online.

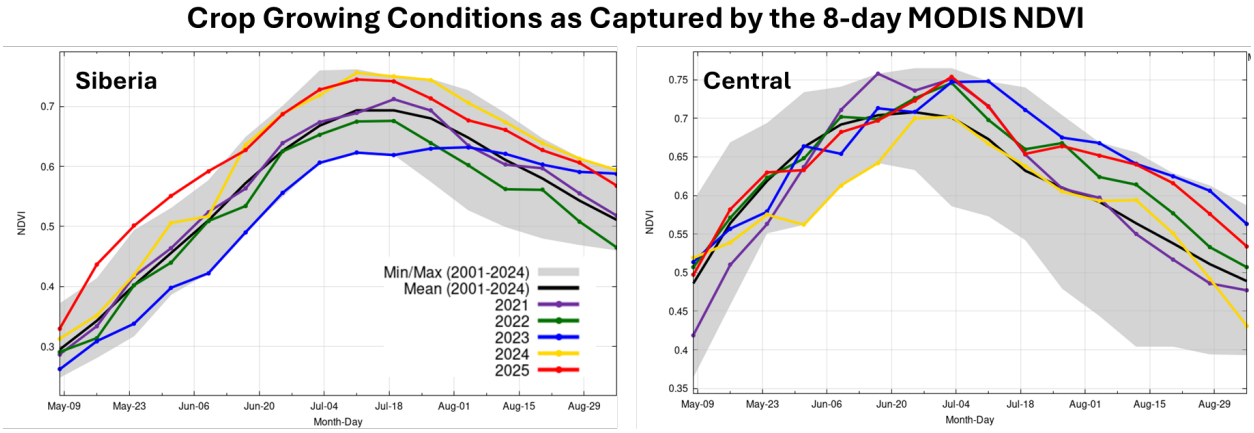


Figure 9. Crop vigor for the spring crop as captured by the 8-day MODIS NDVI data. Source: NASA MODIS.

Author contact information:

Iliana Mladenova
Iliana.Mladenova@usda.gov

For more information and to access FAS databases and reports please visit:

Current World Agricultural Production Reports
https://www.fas.usda.gov/data/world-agricultural-production

Production, Supply and Distribution Database (PSD Online)
https://apps.fas.usda.gov/psdonline/app/index.html#/app/home

Global Agricultural Information Network (Agricultural Attaché Reports)
https://www.fas.usda.gov/databases/global-agricultural-information-network-gain

Crop Explorer
https://ipad.fas.usda.gov/cropexplorer/

Global Agricultural and Disaster Assessment System (GADAS)
https://geo.fas.usda.gov/GADAS/index.html