

Black Sea Crop Update

24 May 2022

Fieldwork progress

Ukraine's spring planting progress

As of May 19, Ukraine's planting pace of the main spring crops was 27% behind 2020 and 2019.

Spring wheat

Spring wheat finished slightly up on previous years at 186KHA, contributing little overall to the 6.5MHA winter wheat crop.

Spring barley

Spring barley finished down 33% on previous years at 0.9MHA, giving a combined winter-spring barley crop of 1.9MHA.

This is down nearly 30% on the five-year average barley area.

Corn

Corn is currently running at 4.2MHA, down 15% and 21% on the previous two years.

We anticipate corn will finish around 10% down on last year, giving a final crop of around 4.8-4.9MHA, but this depends on how far farmers will push the standard planting window.

Corn planting starts to wrap up around the first week of June; if farmers have seed, fertiliser and worked ground, they could push on for a further week or so.

Sunflower

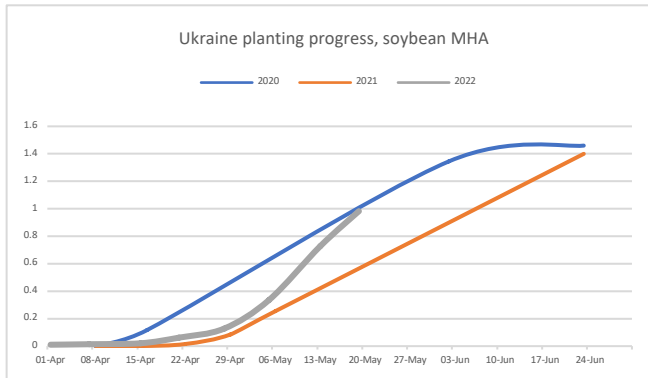
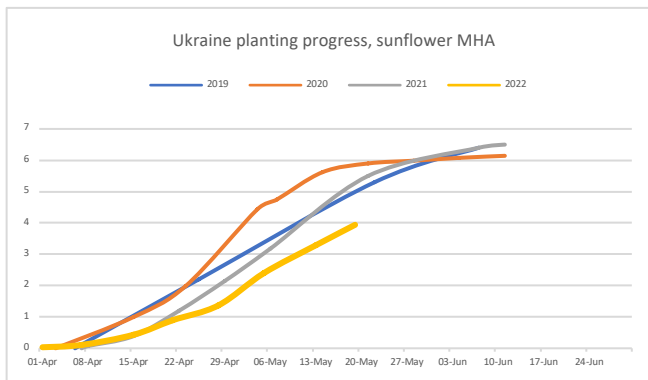
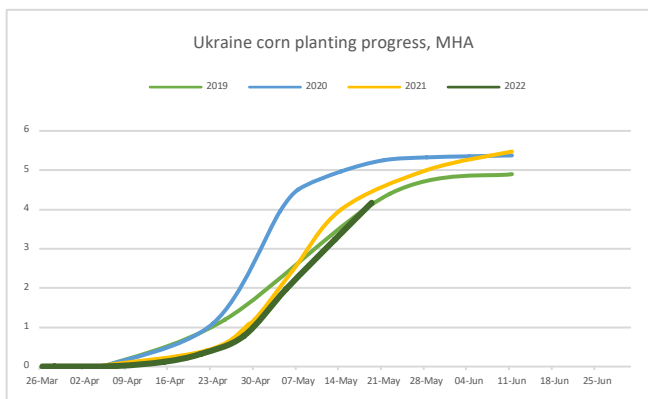
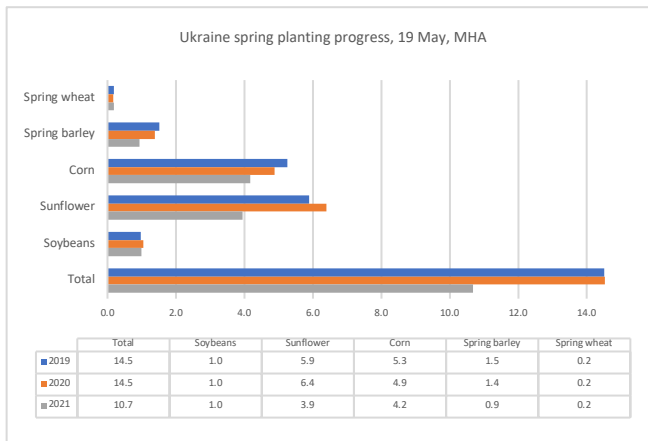
Sunflower planting is currently 3.9MHA, 38% and 33% behind the previous two seasons.

We estimate that around 30% of the planned sunflower crop area is in currently occupied territories and won't be planted this year.

This gives an estimated sunflower crop area of 4.5MHA, but we could see that increase if farmers are confident enough to extend the usual planting window beyond the first week of June.

Soybean

Bean planting stands at 1.0MHA, the same as in previous years, and with only 8% of the planned crop currently in occupied territories, we could see the final area come close to the pre-war forecast of 1.3-1.4MHA.



Mike Lee

blackseacropforecasts@gmail.com