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● USSR: Agriculture

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SOVIET GRAIN HARVEST OUTLOOK

Summary: Cold, wet weather prevailed during the early season in the main granaries of the Soviet Union but no severe setbacks occurred as of last year. The outlook at this juncture is favorable, but the decisive formative period in shaping the grain harvest will come in mid-summer. Excessive weed growth caused by the weather threatens to a degree the quality of the grain. Prospects for the vital sugar beet and sunflower crops are not favorable at this time.

With an indicated shortfall of from six to nine million tons of grain in the global grain output in Eastern Europe this year compared to 1969, (1) the harvest prospects in the Soviet Union assume greater significance than usual this season -- because the Soviets would be asked to supply the deficit to their neighboring communist states.

Unlike in the western world, crop forecasting is still a secretive process in the Soviet Union, and no effort at precision at this juncture is possible because of the fragmentary and often immeasurable data released by the regime. So

(1) See RFE Research paper "Early Season Grain Prospects: Dim," 2 June 1970 by cz.

independent projections are meant to serve as general guidelines reflecting the magnitude of the indicated output of grain for 1970. The only positive means of comparing and projecting the grain output, under these circumstances, are the comparative delivery schedules of grain by the oblasts. Until such announcements are published, beginning in early August, estimating the grain harvest is largely based on the evaluation of the weather reports.

Pravda, in a wrap-up of the current cropping conditions, claimed a wide variety of weather conditions as having characterized the season. This spring was not the easiest, it claimed. In some zones it came early and was very favorable, in others, it was late, capricious, difficult. (2)

Winter Grains

The fall sown grains -- wheat, rye -- which were badly hit in the severe winter of 1968/69, came through in generally good shape. Kosygin, in his Supreme Soviet candidacy speech, maintained that spring work was carried out successfully and that winter grain losses from winter-killing were only one-third those of the previous winter. Last year 10 million hectares were lost or had to be replanted to spring grains. So it seems that perhaps 3 million hectares were lost this winter, a rather normal phenomenon in the Soviet Union. The Premier's remark did not appear in the published versions of the speech but was transmitted in the radio version. (3)

This year's floods extended into Moldavia and the western Ukraine where there was extensive damage, however, these areas are not important sources of marketable grain. (4) In the

(2) Pravda, 11 June 1970.

(3) Radio Moscow I, 10 June 1970.

(4) Radio Kiev, 15 May 1970.

Ukraine proper, the area of highest yields which reached a record average of 21.7 quintals per hectare last year, (5) the season was early, excessively wet and cool. Harvesting will be 10-12 days earlier than last year, (6) when it was abnormally late. The press cautions about the excessive growth of weeds the wet weather has encouraged. This condition will affect negatively both the quality and quantity of grain. The corn sowing was delayed on account of the weather but over 6 million hectares were planted by June. As the Ukraine enjoyed an all-time record harvest of 36.4 million tons last year, it is unlikely a repeat performance can be concluded this year.

The north Caucasus suffered a series of dust storms early this year causing damage to seedings. But the spring was early here and abundant rains came in May. An early harvest is anticipated (7) and last year's poor crop should be improved upon.

In central Russia the reverse procedure occurred: early spring was wet while May was alternately hot and cold. (8) Grains look normal in early June.

June-July will be the formative months for the winter grains. Unless a sharp drought occurs the output appears on last year's level at least, but perhaps of lower quality due to the excessive weed growth.

Spring Grains

This area comprises 65 percent of the small grain hectarage. The main regions are the lower Urals, Kazakhstan, and western Siberia. Last year one came through with a bumper harvest while Kazakhstan and western Siberia fielded average yields.

(5) Selskaya Zhizn, 11 November 1969.

(6) Izvestia, 27 May 1970.

(7) Pravda, 4 June 1970.

(8) Selskaya Zhizn, 20 May 1970.

Kazakhstan planted its norm of 18 million hectares spring grain on soil with abundant moisture, but cold weather delayed the operations. An early and cold season "complicated" the sowing and weed growth is rank. (9) A "difficult, capricious" season in north Kazakhstan is how Pravda described it. (10)

The decisive formative period in the spring wheat regions comes in late June and July, when drought conditions are frequent occurrences. A team of correspondents warned that heavy weed growth would reduce yields considerably unless herbicides were used abundantly. (11) If good weather prevails, last year's average performance could be improved upon.

Apart from grains, the sugar beet crop started off under the handicap of cold and wet weather. Last year it had a disastrous fall from 94 million tons to 71 million tons because of bad weather and disease. Fears were expressed that the current crop might be equally damaged. Another strategic export crop, sunflower seed, has gotten off to a slow start because of prolonged wet and cold soil conditions and competitive weed growth. To counter last year's short crop, when Soviet edible oil exports all but disappeared from world trade, the area planted to sunflowers was above plan -- 4,645,000 hectares -- indicating the intent to re-enter the expanding world market for edible oils.

Balance Sheet

At the present early season juncture, grain prospects in the Soviet Union appear on the level or slightly better than last year's crop of 160 million tons.

It is wholly based on incomplete weather reports. The decisive determinant remains the crucial early and mid-summer growing conditions, about which forecasts are conjectural. If

(9) Sovietskaya Rossiya, 21 May 1970.

(10) Pravda, 30 May 1970.)

reasonably optimum weather prevails in the vast spring grain regions from the Urals to Soberia, and weed growth can be curtailed, a better harvest than last year could be realized in the final year of the 8th Five Year Plan. Revaluation of this forecast will appear regularly from now on to year's end.

With an indicated shortfall of from six to nine million tons of grain in Eastern Europe this year, the question remains whether the usual supplier, the Soviet Union, will be able to fill the gap. In the past five years an average of 4.4 million tons of grain were exported annually, about 80 percent to Comecon countries. A bumper Soviet harvest could allow a record 10 million tons for export (previous high: 6.7 million tons), but more likely some Comecon states will be forced to turn to western markets for a part of their grain requirements.