

# UKRAINE: WHAT IS SPRING OILSEEDS CONDITION AT THE BEGINNING OF JULY?

- *The heat remains a challenge for sunflowers and soybeans production in 2026*
- *The short-term temperature forecast is favorable for the oilseed crops development*
- *The outlook for the harvest remains positive for now, but risks remain*

As the spring oilseeds gradually enters season shifting period, hot weather is once again raising concerns about their 2026 production potential. For both sunflower and soybean, the coming weeks will largely determine whether crop expectations are stable or need further revisions.

The most critical growth stages for both crops are flowering, reproductive development and seed filling. Moisture shortages combined with extreme temperatures during these phases can cause irreversible yield losses.

## **Sunflower. Heat becomes critical above 30-32°C**

For sunflower, the most vulnerable growth stage is bud formation, flowering and head development. Temperatures above 30-32°C represent the critical threshold. Once temperatures exceed this level, plant growth slows or even stops. Heat stress combined with drought disrupts pollination, reduces pollen viability and increases the formation of empty seeds. As a result, sunflower heads may develop hollow centers while oil content declines significantly.

## **Soybean. Even more dependent on moisture**

Soybean is considerably more sensitive to moisture than sunflower. The critical period covers flowering, pod formation and seed filling. During this stage, soybean requires up to 70% of its total seasonal water demand. When temperatures rise above 30-32°C, plant development slows. Temperatures exceeding 40°C become highly destructive.

Moisture deficits combined with extreme heat trigger widespread flower, bud and young pod abortion. Remaining seeds become smaller, while yield losses may reach 45-70% under severe stress.

## **Current situation. No widespread damage yet**

As of early July, weather-related damage remains relatively limited. Neither sunflower nor soybean entered pollination or seed-filling stages on a large scale. Only southern regions have begun flowering. The recent heatwave and drought lasted for approximately one week, which was not long enough to cause widespread production losses.

However, localized damage has already been reported, particularly on light sandy soils where moisture reserves were already limited. At this stage, the market is watching weather forecasts much more closely than crop conditions.

## **Weather outlook. Short-term relief, long-term uncertainty**

The short-term outlook therefore remains supportive for spring crops.

Weather models indicate cooler temperatures and rainfall during the coming week. Daily temperatures are expected to return close to seasonal norms across most of Ukraine. Rainfall forecasts suggest 25-40 mm of precipitation across northern, parts of central and western regions. However, rainfall will remain highly localized. While these rains should reduce immediate crop stress, they are unlikely to fully replenish soil moisture reserves.

From mid-July onward, however, weather will become the dominant factor determining final yields.

## Production outlook

Current crops estimate has already moved slightly lower compared with early June. As of early July, sunflower production is projected at 12.9-13.6 M mt compared with 13.0-13.7 M mt one month earlier.

Soybean forecasts have declined more noticeably to 4.7-5.6 M mt vs. 4.9-5.8 M mt in early June. The larger adjustment for soybean reflects its significantly higher sensitivity to moisture stress during reproductive growth.

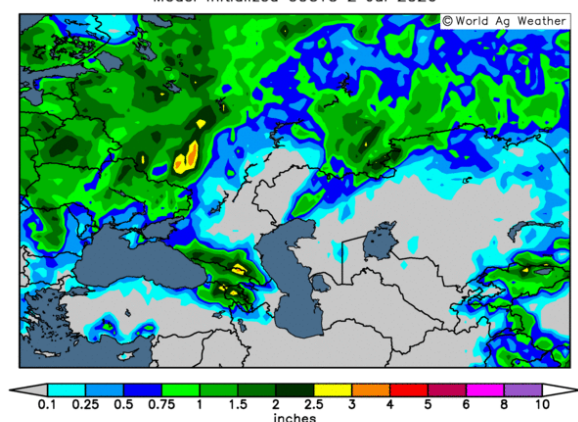
## Markets remain cautiously optimistic

At present, the market continues to work with a positive weather scenario while keeping downside risks in focus. The main risk remains the possible return of prolonged heat without meaningful rainfall during the second half of July.

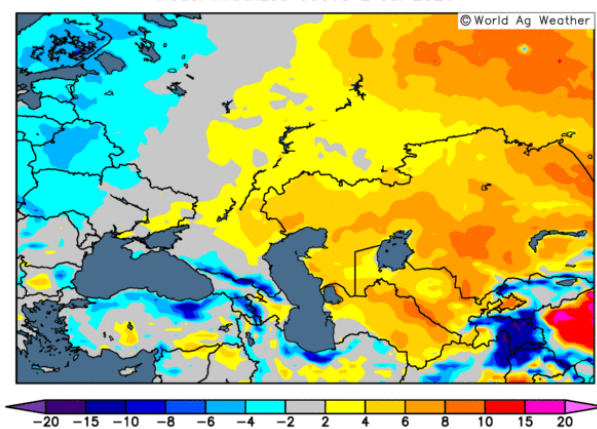
Another factor under increasing attention is the potential expansion of Ukraine's "grey zone" caused by the ongoing security situation. This could reduce area to be harvested beyond purely weather-related losses.

If both risks turned into reality simultaneously, Ukraine could harvest fewer oilseeds than currently expected, resulting in a tighter S&D in the 2026/27 MY. The market is not pricing this scenario yet, but neither is ignoring it.

GFS High-Resolution Precipitation Forecast  
Days 1-7: 00UTC 3 Jul 2026 - 00UTC 10 Jul 2026  
Model Initialized 00UTC 2 Jul 2026



GEFS Ensemble Mean Temperature Anomaly (°F)  
Days 1-7: 00UTC 3 Jul 2026 - 00UTC 10 Jul 2026  
Model Initialized 00UTC 2 Jul 2026



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