

Good harvests in the west improving food supplies despite southeast shortfalls

Key Messages

- In July 2024, Russian forces continued to launch **attacks on population settlements and key infrastructure**, most severely affecting front-line regions in the east. However, attacks on urban centers across Ukraine have also continued. Notably, **on July 8th**, Russian forces launched a large-scale missile attack on multiple Ukrainian cities, including Kyiv. This attack resulted in significant civilian casualties and damage to critical infrastructure, including the partial destruction of the largest hospital for critically ill children in Ukraine, where 34 people were killed. Between July 6th and 12th, Russian shelling and airstrikes caused **at least 77 civilian deaths** across the frontline regions of Dnipro, Donetsk, Kharkiv, Kherson, Mykolaiv, and Odesa, as well as Kyiv. Russian forces also **struck energy facilities** in Sumy and Chernihiv, railway infrastructure in Kharkiv, and port infrastructure in Odesa.
- **Widespread rolling blackouts** continued in July, including extended outages in Kyiv for at least 10 hours daily. A 25 percent increase in power consumption due to unusually hot summer weather is exacerbating Ukraine's energy crisis. While the Ukrainian state grid operator expects **energy system improvements by August** due to ongoing repairs to nuclear power plants, such improvements are contingent on the ability of repairs and maintenance to continue. The government is **negotiating with the EU** to lift electricity import restrictions to reduce energy deficits ahead of peak winter demand. Meanwhile, businesses have **reportedly** adapted to the blackouts with generators. Additionally, with support from Germany, FAO has distributed nearly half of a total planned 245 **generators to food producers** in frontline areas to support essential food production.
- In July, **harvests** of spring barley, oats, spring rye, and winter wheat and rye are ongoing, the buckwheat cropping season is nearing completion, and corn crops are in the flowering stage of development. In western and central regions, cropping conditions for wheat, maize, and soybeans are mostly favorable to exceptional, according to **GEOGLAM** as of July 28th. Notably, farmers in western Ukraine have devoted increasing shares of their production to soybeans since the beginning of the conflict because it is more lucrative than staple grain production. However, the ongoing war and adverse weather have negatively impacted yields in the eastern and southern regions. In particular, southeastern Ukraine experienced below-average precipitation and hot, dry conditions from April to July 2024, leading to low soil moisture and poor crop conditions.
- Cumulative rainfall in August is likely to be below average, exacerbating the impact of drier-than-average conditions on crop production, especially in southeastern Ukraine. While average rainfall is anticipated during the planting and cultivation of winter wheat and rye from August to mid-October, overall yield potential for summer and autumn crops remains at risk due to worsening dry spells and abnormal heat during the flowering and grain-filling period of cultivation. In late July, the Ukraine Grain Association slightly **revised the 2024/25 harvest forecast** from 74.6 million tons to 71.8 million tons. Over 22 million tons of grains and oilseeds had been harvested **as of July 26th, 2024**, including over 19 million tons of grain and over 3 million tons of oilseeds. Despite anticipated harvest deficits in the southeast, Ukraine is expected to remain a **leading exporter** of agricultural commodities during the 2024/25 marketing year.

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