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ANALYSIS

Russia's War on Ukrainian Farms: The Black Sea Theater

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Abstract

Ukrainian agriculture is a central pillar of the country's economy and of its post-war recovery and reconstruction. Russia's deliberate targeting of agricultural infrastructure and its naval blockade of the Black and Azov Seas have prevented Ukrainian grain from reaching world markets, threatening the global food system. Since Russia failed to renew its participation in the grain deal in July 2023, the Black Sea has become an increasingly contested space. Although Ukraine has unilaterally declared a maritime corridor and some commercial ships have defied Russia's warning that they may be targeted, in the absence of a new agreement on a Grain Corridor, this remains a perilous and risky path for Ukrainian grain. If there is hope for a new Grain Deal, Recep Tayyip Erdoğan, President of Türkiye, will likely be its broker. Erdoğan is interested in a normalization of food trade not only to shore up Türkiye's own food security, but because the country's food-commodity trade relations with Europe and the Middle East make it a central node in the global food system.

Grain as a Pillar of Ukraine's Economy and Post-War Reconstruction

Ukraine's abundant arable land, fertile soils, and long growing seasons have historically placed agriculture at the center of the country's economy. Agriculture generated 41 percent of Ukraine's export earnings in 2021 and accounted for around 20 percent of GDP, making export-oriented agricultural production Ukraine's fastest-growing sector over the last decade. The sector also employs a much larger share of the country's working-age population than in Western Europe or the United States. Roughly one-third of Ukraine's population lives in rural areas, and agriculture accounts for 17 percent of domestic employment (Ministry of Economy of Ukraine 2022). With growing production and rapidly rising yields and export volumes, Ukraine has become one of the most important contributors to global food security: millions of urban poor in Asia, Africa, and the Middle East rely on affordable grain imports from Ukraine (United Nations Security Council 2022). Before the war, Ukrainian corn accounted for as much as 80 percent of China's corn imports.

Thus, Ukrainian rural production is crucial for the country's war economy, its post-war recovery and reconstruction, and indeed the future of the global food system.

Given that export-oriented agriculture is a pillar of the Ukrainian economy, the Russian naval blockade of the Black and Azov Seas that has prevented Ukrainian grain from reaching world markets has been one of the most harmful aspects of the war. While the world watched Russia's army encroach on Kyiv in early 2022, Russian naval forces began attacking ships, blocking all commercial trade to and from Ukrainian ports and mining Black Sea waters (Borger 2022). Between July

2022 and July 2023, the naval blockade was temporarily and partially eased by the Grain Corridor, an agreement between the warring parties, the UN, and Türkiye created through the Black Sea Grain Initiative (BSGI). The BSGI allowed Ukrainian grain to reach global markets from July 2022, but on July 17, 2023, Russia terminated its participation in the agreement (Bigg et al. 2023).

Before the war, virtually all of Ukraine's agricultural products were exported via the Black Sea—a commercially and strategically important maritime passage. While Ukrainian farms have tried over the past year to find alternative export routes, it is costly to shift the transport of significant amounts of grain from sea to rail or road, and it is nearly impossible for these alternative means to export Ukraine's harvest in its entirety. Moreover, the competition that low-cost Ukrainian grain poses to Eastern European farms has threatened to undermine the logistical support for the war given by critical allies, including Poland, Hungary, Slovakia, Bulgaria, and Romania (Associated Press 2023).

The Black Sea blockade is part of Russia's war on Ukrainians farms, in which Russian forces have deliberately targeted the country's ability to produce food for the world (Wengle and Dankevych 2022b). Since the beginning of the war in February 2022, Russian attacks on granaries and grain export terminals, the destruction wrought by the explosion of the Kakhovka dam, mines, and stolen tractors have all caused grievous harm to Ukrainian farms (Wengle and Dankevych 2022a and 2023; Flylyppov and Lister 2022). Since the termination of the BSGI, the targeting of grain-related export infrastructure has become even more blatant: Russian missiles have struck granaries and port infrastructure in Odesa, one of Ukraine's main ports, and on the Danube, the most feasible alternative export route

for Ukrainian grain (Garanich 2023; Greenall 2023). Although Russia claims that, if its conditions are met, it is willing to resume the Grain Deal, Russia has so far refused to reopen the Grain Corridor (Vedomosti 2023).

In recent months, the Black Sea has become an increasingly contested space. Russia's Black Sea Fleet was widely seen to have the preponderance of naval power. Despite this, the Russian navy has also been vulnerable to Ukrainian maritime drone attacks, and a number of successful strikes have made Russia reluctant to risk its own ships (Trofimov 2023). In August, Ukraine unilaterally declared a corridor for commercial vessels, and a small number of commercial ships have managed to leave Odesa (Armstrong 2023). On September 19, a commercial ship loaded with grain, the *Resilient Africa*, managed to leave the Ukrainian port of Chornomorsk and arrive safely in Romania. These remain extremely risky voyages, as the Russian navy has repeatedly threatened to attack civilian ships in the Black Sea (Reuters 2023). Nevertheless, the *Resilient Africa*'s safe passage is a victory for Ukraine and demonstrates a vulnerability of the Russian navy that may make Russia more amenable to a diplomatic settlement that protects commercial ships, including ships involved with grain trade, on the Black Sea.

The Grain Corridor and Russia's Black Sea Blackmail

The original Grain Corridor—formally known as the Black Sea Grain Initiative (BSGI)—was signed in Istanbul on July 22, 2022 (United Nations 2023). Russia agreed to a limited and temporary easing of the naval blockade it had imposed in February 2022, allowing for the restoration of grain-trade operations at three seaports: Odesa, Chornomorsk, and Pivdenny. The BSGI, brokered by Türkiye, was a rare diplomatic victory in 2022. By the time the original agreement collapsed in July 2023, after nearly a year in operation, the Grain Corridor had enabled Ukraine to export over 32.8 million tons of grain and helped control global food price inflation (United Nations Office at Geneva 2023). The Grain Corridor was nonetheless politically tenuous and, at best, a better-than-nothing solution to an urgent problem. The core problem with the BSGI was that it was initially limited to 120 days and then extended for just 60 days at a time in November 2022 and March 2023. These periods are far too short for Ukrainian farmers, who need to plan ahead by at least one growing season (Wengle and Dankevych 2022b).

What is more, the limited durations of each of these agreements gave Russia opportunities to blackmail Ukraine and its Western allies and to extract concessions on sanctions. Moscow did not fail to take this opportunity every time the agreement expired, negoti-

ating a number of extremely important concessions in return for allowing the passage of Ukrainian grain in 2022. The United States excluded trade in agricultural commodities and fertilizer from its embargo on Russia, while the EU modified financial sanctions to allow payment for these commodities. Nevertheless, for much of 2022, the Kremlin expressed dissatisfaction with how food and fertilizer exports remained affected by the sanctions. Some shipping companies, insurers, and banks had shied away from facilitating Russian trade due to sanctions, which led to Russian claims that the terms of the original BSGI had been violated.

This year, Russia has added further demands, including two that are particularly noteworthy. First, Russia is demanding that the State Agricultural Bank (Rosselkhozbank) be exempted from sanctions, insisting that the bank is only engaged in facilitating food production and export. Reports by the *Economist* and *Source Material*, an investigative journalism non-profit organization, however, have established that Rosselkhozbank is also financing an oil trading company and therefore helps insulate Russia's energy sector from the impact of sanctions (*The Economist* 2023; *SourceMaterial* 2023). Rosselkhozbank's chairman is Dmitry Patrushev (who also holds the post of Minister of Agriculture), the son of Nikolai Patrushev, a prominent *silovik* known to have close ties to President Putin. The UN has nevertheless recently signaled a willingness to reconnect Rosselkhozbank to the SWIFT system, from which it has been excluded since Western sanctions were imposed in 2022 (Nichols 2023). This would indeed be a major concession in the West's sanctions regime.

Russia's second significant demand is that Ukraine free up an ammonia pipeline that Russia uses to export fertilizer from Togliatti to global markets via the port of Odesa. Ukraine has blocked the pipeline since February 2022, the beginning of Russia's invasion. The pipeline was also damaged in an attack in June 2023, which Russia claims was perpetrated by Ukrainian forces (*Reuters* 2023). Russia is a leading exporter of ammonium fertilizer, and the Russian Foreign Ministry has called the reopening of the pipeline a "linchpin" of its conditions on renewal of the grain deal. In essence, Russia is trying to remove sanctions-related restrictions on its own abundant harvest and resources, allowing it to take advantage of tight global markets for grain and fertilizer. The reopening of the Togliatti–Odesa pipeline would be a boon for the Russian economy.

Türkiye's Pivotal Role in the Black Sea and Global Food Supply Chains

It is by now well known that the Black Sea region is critical for the global food system. Ukrainian and Russian farms produce a large share of the world's corn,

wheat, and sunflower seeds—basic building blocks for today's industrial food production. Although the war devastated farms and disrupted last year's growing season, Ukrainian farmers still harvested many millions of tons of foodstuffs. For its part, Russia has been able to increase grain exports in the 2022/23 growing season compared to 2021/22.

What is less well known is that Türkiye plays a tremendously important role in the food supply chains that connect Ukraine, Russia, and Türkiye with the Middle East and Europe. Since Russia defected in July 2023, Recep Tayyip Erdoğan has spearheaded a flurry of diplomatic efforts to resuscitate the grain deal. In early July, Erdoğan met with Ukrainian President Volodymyr Zelensky in Istanbul; in early September, he traveled to Moscow to meet with Putin (Sezer 2023). Erdoğan recently pledged that he will be “present at every table” where solutions to the global food crisis are discussed and that he will make the crisis “one of the main agenda items” of the UN General Assembly meeting in September 2023 (Directorate of Communications 2023).

Why is Türkiye so intent on reviving the Grain Deal? Erdoğan is deeply invested in creating a safe passage for Eurasian grain because not only is Türkiye one of the largest importers of Eurasian grain, it is also a key node for agricultural and food trade between Eurasia, Europe, and the Middle East. That means that both its own food security and the stability of its food-export sector depend on imported Eurasian grain (*Daily Sabah* 2023). In other words, freeing up Ukrainian grain is desirable for Erdoğan for domestic political reasons and for the normalization of one of its most important foreign economic relations.

High grain prices are enormously costly for Türkiye because the Turkish Grain Board purchases large quantities of imported wheat and sells it to domestic flour mills and pasta producers at a significant discount (Karabina 2023). These grain subsidies are meant to stabilize the cost of bread, a basic dietary staple. This was particularly important in the months before Türkiye's presidential election, in which Erdoğan faced a popular contender. It is likely no coincidence that Russia renewed its participation in the BSGI in March and May 2023, despite repeated and serious misgivings: both dates fell before Turkish elections.

But Türkiye's concerns about Eurasian grain run deeper than just feeding its own population. Türkiye plays a pivotal role in the global food system. Since the founding of modern Türkiye, the Turkish government has supported farms with generous subsidies, stable demand from the state's marketing board, and below-market credits through a state agricultural bank. Turkish farms grow a variety of products, including wheat, cotton, and hazelnuts..

Türkiye is the world's leading exporter of flour and hazelnuts and a major exporter of pasta. Flour is particularly important in the current context: Türkiye exported over \$1.1 billion of wheat flour in 2021, nearly three times as much as the second largest exporter, Germany (OEC 2023). Most of Türkiye's wheat flour goes to the Middle East, with Iraq, Yemen, and Syria the top three destinations. Although Turkish citizens are among the world's largest consumers of wheat products, nearly 70 percent of the wheat Türkiye imports is processed and re-exported as flour and pasta. Turkish government regulations require exported flour, pasta, and bulgur to be made with imported wheat. In 2021, Türkiye imported \$2.49 billion of wheat; the vast majority of this was sourced from Russia and Ukraine, with the Russian government-controlled United Grain Company a major supplier (OEC 2023). The country's flour, pasta, and hazelnuts exports make Türkiye a critical food supplier for Europe and the Middle East.

A further important aspect of Türkiye's role in the global food system is that climate change has increasingly threatened its rural producers in recent years. Turkish agriculture is considered highly vulnerable to droughts, desertification, and rapidly depleting groundwater aquifers (Tanchum 2023). Hazelnuts and cotton, the country's most valuable food exports, are both thirsty crops: cotton is notorious for its water requirements, needing roughly five times as much water as wheat. In 2020, 97 percent of farmers across Türkiye reported diminished harvests and yields due to climate change-related impacts on their farms. According to UN estimates, 60 percent of the country's territory is prone to desertification. These acute climate-related threats have compounded global threats to food supply and led to extremely high food-price inflation: in spring of this year, Türkiye's food inflation rate was 52.5 percent, which was four times higher than the OECD average (Tanchum 2023). Declining domestic harvests are making Türkiye ever more dependent on imported grains.

Commerce and Geopolitics

The Black Sea is a vital passage for commercial shipping for all littoral states, including Ukraine, Russia, and Türkiye. In addition to grain, a vast array of industrial commodities, including a share of Russia's oil exports, are shipped through its waters. It is also, of course, of major geopolitical importance and a theater of war. Although Russia has the preponderance of naval power in the Black Sea, Ukraine has managed to elevate the risks for Russian vessels through increasing reliance on long-range naval drones. In recent weeks, Ukraine has targeted several Russian targets in the Black Sea Fleet's Sevastopol's headquarters.

Türkiye is the ultimate arbiter of commercial shipping on the Black Sea during a time of war. With its control of the Bosphorus and Dardanelles, known as the Turkish straits, Türkiye has the final word on commercial and military vessels entering and exiting the Black Sea under a 1936 international treaty, known as the Montreux Convention, that obliges Türkiye to allow free passage to all merchant vessels. Importantly, though, this convention distinguishes between war and peace. Days after Russia's invasion, on February 28, 2022, Türkiye closed the straits to warships. The treaty also stipulates that if Türkiye considers itself under attack, the country can restrict trade. Ukraine, for its part, claims the right to attack Russian commercial vessels under the Treaty of San Remo (Trofimov 2023).

For now, in the absence of a grain deal, the fate of every ship carrying Ukrainian and Russian grain will be uncertain—it is likely that non-hostile commercial

ships will end up being targeted by one of the warring parties. The interdependent nature of the three countries' agricultural production, though, contributes to a better understanding of the conditions for a renewal of a deal that would protect commercial traffic during the ongoing war. Ukrainian farms rely on safe passage of their ships through the Black Sea. Russia has overwhelming naval power but also wishes to restore the ammonia pipeline that runs through Ukraine and needs Türkiye's goodwill to allow its own exports, including the fruits of this year's record grain harvest, to reach the world market via the Bosphorus. Türkiye, meanwhile, has a strong and vested interest in preventing Russia from weaponizing food, causing disruptions to global food trade and driving up food commodity prices even further. If there is hope for a new Grain Deal, it is Erdoğan who will be its most likely broker.

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Susanne Wengle is Professor of Russian and Eurasian Studies at Uppsala University, Sweden, and Associate Professor of Political Science at the University of Notre Dame, USA. Her research examines Russia's post-Soviet political and economic transformation and engages with questions how we study market creation in this context and beyond. Prof. Wengle's new book—*Black Earth, White Bread: A Technopolitical History of Russian Agriculture and Food* (2022)—is an interdisciplinary history of Russia and the Soviet Union's agriculture and food systems that documents the complex interactions between political goals, daily cultural practices, and technological improvements.

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