



CIHEAM

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MED-Amin: Crop progress - August 2015



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Abstract

We present here a crop progress report at the end of August 2015 realized from a range of reference data (USDA, AMIS, FAO, IGC, EU/MARS, MED-Amin) as well as from public statements collected from ministerial or cereal offices (either as press release or directly from their websites).

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Wheat

● Global trends

It is estimated that, at the end of August, about 80% of wheat in AMIS countries (representing together over 87% of world production) has been harvested.

On August, 15 2015, USDA forecasted a record world harvest for the third year in a row (726.5 mln tons for 2015/16). Among AMIS countries, we observe the following trends:

- **European Union (21% of world production¹):** the crop monitoring report published by the European Commission (Mars) forecasts inferior yields as compared with 2014/15 (-5/6 % for wheat and barley, and about -20% for corn) as a result of the drought and heat waves observed in a number of European countries. USDA forecasts a reduced wheat production of 147.88 mln tons against 156.45 in 2014/15. AMIS estimates are close with a forecast at 148.5 mln tons (2015/6) against 156.2(2014/15). Estimates realized by EUROSTAT between 2008 and 2012 indicate that, in average, wheat harvests in the European Union are over at 97% at the end of August.

- **China (17%):** The country should be reaching the end of the harvest both of winter and spring wheat. USDA forecast an increased production of 130 mln tons against 126.17 in 2014/15. AMIS gives the following estimates: 127.3 mln tons(2015/16) against 126.2 (2014/15).

- **India (12%):** Winter wheat is in since the month of June. USDA forecasts a production of 90 mln tons against 95.85 in 2014/15. AMIS: 90.8 (2015/16) ; 95.9(2014/15).

- **USA (9%):** If winter wheat is already off the fields, spring wheat's harvest is also well on its way (75% harvested, against 26% at the same period last year, USDA), with improved yields in most cases except for Spring Hard Wheat (down to 1.80 ton/ha from 1.81 last year). Some reports point to poor quality in soft red winter wheat. USDA forecasts a 58.13 mln tons harvest up 3 mln tons from last year's campaign. AMIS: 57.7 (2015/16) ; 55.1 (2014/15).

- **Russia (8%):** The agricultural ministry announced on Aug, 27 2015 that 58% of the planted areas had been harvested, with a yield slightly lower than last year (3.04 t/ha against 3.32 t/ha in 2014). USDA forecasts a 60 mln tons production for 2015/16 (against 59.08 last year). AMIS: 56.5 (2015/16) ; 59.7 (2014/15).

The evaluation of crops proposed in June by GEOGLAM within AMIS Market Monitor indicated favorable conditions for most countries with a "Watch" status for about 20% of planted areas in Europe and Russia.

1 2008-12 Average

MED-Amin Area

● Harvests and Planting Calendar - MED-amin countries

		MED-Amin Calendar - Wheat											
		J	F	M	A	M	J	J	A	S	O	N	D
Albania	Soft wheat						■	■			■	■	
Algeria	Soft/durum wheat						■	■	■			■	■
Egypt	Soft/durum wheat				■	■				■	■		
France	Durum wheat						■	■			■	■	
	Soft wheat						■	■	■	■	■	■	
Greece	Durum wheat						■				■	■	
	Soft wheat						■			■	■	■	
Italy	Soft/durum wheat						■	■			■	■	
Lebanon	Soft/durum wheat						■					■	■
Malta	Soft/durum wheat			■	■	■						■	■
Portugal	Soft/durum wheat						■	■				■	■
Spain	Durum wheat						■	■	■	■	■	■	■
	Soft wheat						■	■	■		■	■	■
Tunisia	Soft/durum wheat						■	■				■	■
Turkey	Soft/durum wheat						■	■			■	■	

● Trends - MED-amin countries

As regards countries in the MED-Amin area, wheat harvests are over at the end of August. Planting of soft wheat will begin shortly in France and Greece as well as planting of durum wheat in Spain and will progressively take place for all other countries and wheat types starting in October.

- **Egypt:** AMIS forecasts a 9 mln tons production for 2015/16 against 8.8 mln tons in 2014/15.

- **Morocco:** USDA forecasts a production of 8 mln tons of wheat (that is an increase of almost 200.000 tons compared to last year). The JRC Mars Bulletin forecasts yields of 2.04 t/ha against 1.71 last year.

- **Algeria:** The total announced production of 4 mln tons is reportedly better than that of the last campaign (3.5 mln tons) (OAIC). The JRC Mars Bulletin forecasts yields of 1.72 t/ha against 1.48 last year.

- **Tunisia:** Tunisia on its part is expecting a difficult harvest this year, with quantities much lower as compared with last harvest (estimated at 3 mln tons all cereals included in 2014/15). The JRC Mars Bulletin forecasts yields at 2.14 t/ha.

- **Turkey:** USDA forecasts a production of 19.5 mln tons for 2015/16, that is an increase of 1.5 mln tons as compared with 2014/15. AMIS: 22.5 (2015/16); 19 (2014/15).

Corn

● Global trends

It is estimated that about 15% of corn in AMIS countries (that is over 90% of the world production) have been harvested at the end of August. To date, one main event is the anticipated strong deterioration of yields in Europe as a result to poor meteorological conditions.

- **USA (36% of world production¹):** Harvests in the US have not started yet (starting is usually scheduled in mid-September). USDA forecasts a production at 347.6 mln tons for year 2015/16 against 361.1 last year. AMIS gives us the following estimates: 346.2 mln tons(2015/16) against 361.1(2014/15).

- **China (21%):** Corn fields in the south region should already have been harvested, whereas harvest in the North is currently in progress and should define the extent of the region's imports needs in foreign corn. USDA forecasts a record production of 225 mln tons (or 9.3 mln tons more than 2014). AMIS forecasts, on the other hand, are of 226 mln tons(2015/16) against 215.7 (2014/15).

- **Brazil (7%):** The first harvest (around 40% of the total Brazilian production) has been over since the start of the summer and the second harvest is being finished now. It is estimated that, in average, 95% of the harvest is in at the end of August. USDA forecasts this year a harvest of 84 mln tons against 80 mln tons in 2014. AMIS: 79 (2015/16) ; 78.2 (2014/15).

- **European Union (7%):** Harvests have not yet begun in the European Union. USDA forecast a 62.25 mln tons harvest in 2015/16 against 75.13 in 2014. The MARS unit of the European Commission forecasts on its part weaker yields by -20% as compared with last year (inferior yields in most countries except Belgium and Spain). AMIS: 67.5 (2015/16) ; 74.3 (2014/15).

- **Mexico (3%):** the autumn-winter crop is already in (55% of the total prod.), whereas the spring/summer crop harvest is about to begin. USDA forecasts a 23.5 mln tons production, representing a decrease of 1.5 mln tons as compared with last year. AMIS estimates are close enough with a forecast at 24.9 mln tons (2015/6) against 23.9(2014/15).

1 2008-12 Average

MED-Amin Area

● Harvests and Planting Calendars - MED-amin Countries

		MED-Amin Calendar - Corn											
		J	F	M	A	M	J	J	A	S	O	N	D
Albania					■	■	■	■					
Algeria					■	■	■	■	■	■			
France					■	■				■	■	■	
Greece					■	■				■	■	■	
Italy					■	■				■	■		
Morocco				■			■						
Portugal					■	■				■	■		
Spain	<i>Planting</i>		■	■	■								
Spain	<i>Harvest</i>	■	■	■						■	■	■	■
Turkey					■	■				■	■		

● Trends - MED-amin countries

As far as corn in the MED-Amin area are concerned, the harvest will begin in general in the month of October, except in Albania, where the harvest should be over and in Algeria, where the harvest should be in half-way through. Most countries in the area experienced sustained heat waves and drought that lead analysts to anticipate deteriorated yields for the 2015/16 campaign, except in Spain and in Portugal (MARS forecasts yields at 11 against 10.8 t/ha and 8.54 against 8.44 respectively).

- **Turkey:** the harvest has just started in average, as only the mid-east region of Turkey is harvesting at this period (about 10% of the total production). The JRC MARS bulletin forecasts yields of 9.80 tons/ha against 9.07 last year. AMIS estimates forecasts a 6.3 mln tons production (2015/16) against 6 mln tons last year.

- **Egypt:** In the same way, in Egypt, the harvests usually take place in October and November. AMIS gives us the following estimates : 6 mln tons (2015/16) against 5.8 last year.

- **Albania:** Little specific data on Albania is published, but we know that other Balkan countries have experimented sustained periods of heat and drought harmful to crops.

Barley

● Global trends

The European Union, Russia, Ukraine, Canada, Turkey and the USA are the biggest producers of Barley. They represent together 81% of the world production in average between 2008 and 2012.

- **European Union (41% of world production¹):** Harvests are over in most European countries (Harvests in June/July in France and Spain, Germany and the UK (winter barley): in July/August: UK (spring barley) and taking place in August/September in Sweden; while German spring barley harvest can extend during the month of September). USDA forecasts a 57.2 mln tons harvest against 60.2 for the 2014/15 campaign. On Aug, 24, the MARS bulletin forecasts yields slightly lower than last year in most European countries, apart from France, Croatia, and Italy.
- **Russia (11%):** The Agricultural ministry announced on August 27, 2015 that winter and spring barley harvests were over at 64% with total 16.7 mln tons and an average yield of 2.42 t/ha (against 2.54 in 2014). USDA forecasts a total harvest of 17 mln tons inferior to the 20.3 mln tons in 2014/15.
- **Ukraine (7%):** The Ukrainian authorities announced in a press release (25/08) that harvest was over. USDA forecasts a 8.3 mln ton production, representing a decrease of 1.2 mln tons as compared with last campaign.
- **Canada (6%):** On the contrary, the Canadian campaign is only just starting and could last until mid-October. USDA forecasts for this country a harvest close to 6.5 mln tons, against 7.12 in 2015/16. In the absence of crop report, we will note however that the US campaign being already well on its way, the Canadian one may also be quite precocious.
- **Australia (6%):** The Australian harvest extends usually between October and January. At this stage, USDA forecasts good harvest conditions with an estimated 8.7 mln tons against 8.01 in 2014/15.
- **Turkey (5%):** The Turkish barley harvest, currently realized in June-July, is now over. USDA forecasts a good harvest at 7 mln tons against 4 mln tons last year.
- **USA (4%):** The harvest in the USA is well on its way as with spring wheat (86% harvested against 41% at the same period, according to USDA). USDA forecasts a harvest registering a 800.000 tons increase to 4.57 mln tons.

1 2008-12 Average

MED-Amin Area

● Harvests and Planting Calendars - MED-amin Countries

	MED-Amin Calendar - Barley											
	J	F	M	A	M	J	J	A	S	O	N	D
Albania							■			■		
Algeria						■	■	■	■	■	■	■
Egypt				■	■						■	■
France						■	■	■	■	■	■	
Greece					■						■	
Italy				■	■						■	■
Lebanon					■						■	
Malta				■							■	
Morocco				■	■					■	■	
Portugal	■					■						
Spain						■	■	■		■	■	■
Turkey						■				■	■	

● Trends - MED-amin countries

For all countries in the MED-Amin area, the barley harvest is now over. In average, the crops in terms of quantities have been too deteriorated by the heat, thanks, in particular, to the good performance and relative importance of winter barley.

- **France:** France Agrimer highlights the good quality of the winter barley harvest (9.6 mln tons against 8.4 mln tons in 2014), while spring barley has suffered from excess heat during the filling stage and thus presents heterogeneous quality according to the growing regions as well as a slightly lower production than last year (2.9 against 3.2 mln tons in 2014/15).

- **Morocco:** In Morocco, USDA forecasts a good harvest at 3.5 mln tons against 1.7 in 2014/15. The JRC MARS bulletin forecasts yields of 1.24 t/ha against 0.97 t/ha last year.

- **Algeria:** For Algeria, USDA forecasts a stable production as compared to last year's 1.3 mln tons production. The JRC MARS bulletin forecasts yields of 1.65 t/ha against 1.18 t/ha last year.

- **Tunisia:** USDA forecasts - and Tunisian authorities confirm the trend - a difficult harvest for the whole of cereals in Tunisia with a barley production at 0.4 mln tons against 0.9 mln tons. The JRC MARS bulletin forecasts yields of 1.51 t/ha against 1.41 t/ha last year.

Rice

● Global trends

From a FAO-CBS estimate perspective, it is considered that about 1/3 of the accounted production for the 2015/16 campaign is realized at the end of August. For the largest producers, USDA forecasts so far relatively stable production as compared with last year.

- **China (29% of world production¹):** At the end of August, it is estimated that China has produced about 33% of the production that will be accounted for in the 2015/16 campaign. USDA forecasts a 146 mln ton production against 144.5 mln tons in 2014/15. AMIS proposes the following forecasts: 143.6 mln tons (2015/16) against 142.7 (2014/15).

- **India (21%):** It is generally considered (FAO-CBS; USDA-PSD) that the Indian campaign starts in October. At this stage, the 2015/16 harvest has thus not yet begun. USDA forecasts a stable annual production around 103 mln tons. AMIS: 103.5 (2015/16) ; 102.5 (2014/15).

- **Indonesia (9%):** 80% of the annual rice production is produced between January and August included. USDA projects a stable annual production at about 36.5 mln tons. AMIS estimates, on the other hand, forecasts a 41.6 mln tons production in 2015 against 44.6 in 2014/15.

- **Vietnam (6%):** 85M of the annual rice production is produced between January and August included. USDA projects a stable annual production at about 28 mln tons. AMIS: 29.8 (2015/16) ; 30 (2014/15).

The evaluation of crops proposed in June by GEOGLAM within AMIS Market Monitor points out favorable conditions for crops in China and India for the whole of the harvest, a “watch status” for 1/3 of the Indonesian crop and potential issues (Thailand) or “watch status” (Vietnam, Philippines) for the other big producers.

1 2008-12 Average

MED-Amin Area

● Harvests and Planting Calendars - MED-amin Countries

	MED-Amin Calendar - Rice											
	J	F	M	A	M	J	J	A	S	O	N	D
Egypt					■	■				■		
France				■	■					■	■	
Greece					■				■	■	■	
Italy			■	■	■				■	■		
Morocco							■				■	
Portugal				■	■				■	■		
Spain			■	■	■	■			■	■	■	
Turkey				■	■				■	■		

● Trends - MED-amin countries

For the whole of the MED-Amin area, the rice harvest has not begun yet, as it usually extends between September and November.

- **Egypt:** The main Egyptian rice harvest usually takes place in October. USDA forecasts a 4.60 mln ton production (against 4.53 in 2014). For AMIS, this production will amount to 4.07 mln tons in 2015/16 against 4.14 in 2014/15.

- **European Union:** USDA forecasts a 1.92 against 1.88 mln tons (13% realized at the end of August); Italy usually harvests rice during the months of September and October. AMIS: 1.76 mln tons (2015/16) ; 1.72 (2014/15).

- **Turkey:** The rice harvest in Turkey is usually realized in the month of September and October. AMIS forecasts a 0.53 mln tons production in 2015/16, against 0.49 in 2015/15.



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