CIHEAM

International Centre for Advanced Mediterranean Agronomic Studies

MED-Amin: Harvest & Planting progress

November 2017

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Summary

The present document covers the harvest and planting progress for MED-Amin countries. It is the result of a specific data collection realized with the cooperation of the MED-Amin focal points and from commentaries sent by focal points.

For each cereal, this progress report is preceded by a synthesis of cereal harvests forecasts realized at the end of November 2017 using reference data (USDA, AMIS, FAO, IGC, EU/MARS, MED-Amin) as well as press releases from ministries and cereal offices extracted directly from official websites or from press articles.

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Legend:

Trends this year

Positive Outlook — Stable — Concerns — Not enough data at this point

Wheat

Global trends

According to AMIS, grains, including wheat and maize, are heading for a comfortable market situation in 2017/18. Even for crops where production is forecast to fall below last year's level, supplies are expected to remain sufficient, which may explain some of the downward pressure on prices witnessed in recent weeks.

AMIS does not distinguish between soft wheat and durum, we present the general trends for all wheat. **Forecasts of total wheat production in 2017/18 range from 748.9 Mt (IGC) to 754.9 Mt (FAO / AMIS).** Wheat production raised in 2017, reflecting upward revisions in the EU more than offsetting a cut in Argentina; but latest forecast is still below last year's record.

The evaluation of crop conditions by the end of November 2017 by GEOGLAM as part of AMIS Market Monitor indicated that crop conditions were generally favourable in the northern hemisphere and that harvest conditions vary significantly in the southern hemisphere, with some improvement in Argentina and with significant variability across Australia.

- EU : Forecast EU-28 wheat production is up 1 MMT to 152.5 Mt, up nearly 7.5 Mt on 2016/17 but still nearly 8 Mt below MY 2015/16. The most significant year-on-year increase is in France (up 10.85 Mt) following its very poor crop in 2016/17. In the EU, winter wheat conditions are generally favourable, while some large areas continue to experience difficult sowing conditions. France will have a very good harvest; Germany's wheat crop, which had been forecast to increase slightly, is now thought to have declined, negatively impacted by difficult conditions towards the end of harvest. The UK (800,000 MT) and Poland (700,000 MT) are expecting larger crops than previously forecast. However, the quality of the crop in Poland is reported lower than in MY2016/17, rain causing significant delays of up to a month at harvest, leading to excessive moisture content and sprouting. The weather also delayed the harvests in the Baltics. The Romanian wheat crop developed well after a poor start and Bulgaria recorded a record wheat crop. The USDA's forecast for EU wheat production in 2017/18 is 152.5 Mt.
- In Ukraine, winter wheat conditions are favourable with adequate soil moisture for establishment before winter dormancy. The USDA is forecasting wheat production of 36.5 Mt for 2017/18.
- In the Russian Federation, conditions are favourable for winter wheat establishment. The USDA is forecasting wheat production of 83 Mt for 2017/18.
- In China, winter wheat conditions are favourable with improvements in temperatures and soil moisture in the southwest, which is the most productive region. The USDA is forecasting wheat production of 130 Mt for 2017/18.
- In India, sowing of Rabi wheat have begun under favourable conditions. The USDA is forecasting wheat production of 98.4 Mt for 2017/18.
- In the US, winter wheat is progressing favourably, with some continued dryness in the northern plains. The USDA is forecasting wheat production of 47.4 Mt for 2017/18.
- In Canada, conditions are generally favourable for winter wheat with minor dryness in the prairies, which is limiting seeding. The USDA is forecasting wheat production of 30 Mt for 2017/18.
- In Australia, harvest progress has been slowed by November rainfall. Conditions vary significantly across the country. The USDA is forecasting wheat production of 21.5 Mt for 2017/18.
- In Argentina, harvest is almost finished in the north and beginning in the south under generally favourable conditions. Recent frosts in the southern areas during the grain filling stages will potentially impact yields. The USDA is forecasting wheat production of 17.5 Mt for 2017/18.

Amid limited news, the tone of world wheat export markets remained generally weak during November, weighed by heavy supplies and strong competition for any export business. Aided by attractive prices from the countries of the region, a solid pace of exports was maintained from the Black Sea region, contributing to lacklustre demand at other origins.

MED-Amin Area: Planting Progress - Wheat

Country	Wheat	Date of measurement	Estimated Area 2017 ('000 ha)	Area Evolution n/n-1 (%)	Planting progress (%)	Progress at the same date last year (%)	Estimated end of planting
Albania	Durum		0	-			
	Soft	30/11/2017	70 200	100	90	90	10/01/2018
Algeria	Durum	02/11/2017	1 582 000	102	1	9	
	Soft	02/11/2017	530 000	101	2	10	
Egypt	Durum				nd		
	Soft				nd		
France	Durum	06/11/2017			48	49	
	Soft	06/11/2017			90	88	
Greece	Durum	6-12/11/2017	nd		27	45	31/12/2017
	Soft	6-12/11/2017	nd		27	48	31/12/2017
Italy	Durum	Dec.			nd	nd	
	Soft	Dec.			nd	nd	
Lebanon	Durum				nd		
	Soft				nd		
Morocco	Durum	Avr.			nd		
	Soft	Avr.			nd		
Portugal	Durum	31/10/2017		nd	0		31/12/2017
	Soft	31/10/2017		nd	0		31/12/2017
Spain	Durum	Jan			nd	nd	
	Soft	Jan			nd	nd	
Tunisia	Durum	26/10/2017	627 000	147	0	0	31/01/2018
	Soft	26/10/2017	99 000	nd	1	0	31/01/2018
Turkey	Durum	27/10/2017	1 238 000	100	95	100	Mar.18
	Soft	27/10/2017	6 430 000	100	95	100	Mar.18

n.d: non disclosed

Trends - MED-amin countries

For the countries of the MED-Amin area, planting generally extends from September to November in the northern Mediterranean and from November to December in the south. In Spain, Portugal and the Maghreb, the drought conditions continue.

- **Albania**: Sowing of soft wheat is almost complete for a production area that has been stable for several years. Similarly, the varieties and the quality are stable. The country has good weather conditions.
- **Algeria**: According to the Ministry, surfaces are stable and planting is not very advanced this year.
- **Egypt**: The USDA is forecasting wheat production of 8.1 Mt for 2017/18 and AMIS 8.8 Mt.
- **Spain**: MARS forecasts a sharply lower yield due to drought conditions, at 2.57 t / ha instead of 3.5 the previous year.
- **France**: As of November 6th, planting progress is almost stable compared to last year.
- **Greece**: At the beginning of November, planting progress in Greece is only 27%, behind the previous year (45 to 48%). In most Greek regions, lack of rain delayed plantings.
- **Morocco**: The USDA is forecasting wheat production of 6.25 Mt for 2017/18.
- **Portugal**: Plantings did not start in Portugal at the end of October. The soils are hardened by persistent drought (75% of the Portuguese continental land was in extreme meteorological drought, 25% in severe drought in 2017).
- **Tunisia**: Plantings are almost not started at the end of October. Durum wheat has an increase in sown area of about 46%.
- **Turkey**: On 27 october, plantings are almost complete for wheat, a little behind the previous year and on equivalent surfaces. Sowing of spring wheat will take place in March. USDA and AMIS forecast an increased production (21 and 21.6 Mt).

Corn

Global trends

In the northern hemisphere, harvest wrapped up favourably except in Ukraine. In the southern hemisphere, conditions are generally favourable with minor areas of dryness in Argentina.

Total corn production is forecast at 1044.75 Mt in 2017/18 according to the USDA, 1075.34 Mt according to AMIS. AMIS indicated that 2017 production lifted significantly, mostly reflecting upward revisions in Indonesia and the US.

- In the US, harvest finished under favourable conditions with yields just above last year's record. The USDA is forecasting a corn production of 370.29 Mt for 2017/18.
- EU : 2016/17 EU-28 corn production is revised to 61.5 Mt, up just over 400,000 Mt on the previous expectation (USDA). Within this total, a much improved outlook for the size of the Romanian, and to a lesser extent Bulgarian and German, crops are partially offset by declines elsewhere, most notably for the Hungarian crop. After an excellent 2016/17, Hungary had high hopes for 2017/18 but severe drought ravaged the crop in the summer and production is forecast to have declined nearly 25 per cent on an unchanged planted area, decreasing the country's intra-EU exports. In contrast, the larger than expected Romanian crop is forecast to support its extra-EU exports. Overall, and despite a slight increase in extra-EU imports of corn, the total EU-28 2017/18 crop balance is now expected to see an increased tightening of stocks.
- In China, the USDA is forecasting corn production of 215.89 Mt for 2017/18.
- In Brazil, estimated maize production is 95 Mt for 2017/18 (USDA).
- In Argentina, conditions are mixed for maize planted early with high temperatures and low soil moisture affecting areas of Córdoba and northern areas entering the vegetative stage. The USDA is forecasting a corn production of 42 Mt for 2017/18.
- In Mexico, harvest of the spring-planted crop continues under good conditions. The USDA is forecasting a corn production of 26.20 Mt for 2017/18.
- In Ukraine, harvest is all but completed under generally poor conditions due to drought and heat stress during the season, with the exception of the west. The USDA is forecasting a corn production of 25 Mt for 2017/18.In India, sowing of the Rabi crop is progressing under favourable conditions. The USDA is forecasting also a corn production of 25 Mt for 2017/18.
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According to AMIS, utilization in 2017/18 raised, with most of the increase driven by higher feed use.

Trade in 2017/18 (July/June) reduced, partially because of lower-than-earlier projected import demand by Viet Nam; but global trade still to surpass the 2016/17 record volume by a significant margin.

Stocks (ending in 2018) scaled up mostly on larger inventory build-ups in several countries, especially in the US where ending stocks could climb to a new record.

After nine successive monthly declines, the IGC maize subIndex firmed slightly in November, as modest gains in South America and the Black Sea region compensated for renewed losses in the US. However, owing to ample spot supplies, average prices are down 8.9 percent compared to a year earlier.

The evaluation of harvest conditions by the end of November 2017 by GEOGLAM as part of AMIS Market Monitor indicated that harvest wraps up in the northern hemisphere whereas conditions are favourable in the southern hemisphere with only minor dryness in Argentina.

MED-Amin Area: Harvest Progress - Corn

Country	Date of measurement	Estimated Area 2017 ('000 ha)	Area Evolution n/n-1 (%)	Harvest progress (%)	Progress at the same date last year (%)	Estimated end of harvest
Albania	30/11/2017	58 600	100	100	100	
Egypt						
France	06/11/2017	1 432 000	111	97	88	
Greece	6-12/11/2017	129 505	97	85	94	
Italy	26/09/2017			nd	nd	
Morocco	15/11/2017		nd	100	nd	
Portugal	31/10/2017	83 930	95	95	50	
Spain	10/10/2017	349 642	96	nd	nd	Jan. 18
Turkey	27/10/2017	680 000	100	90	100	Oct. 17

n.d: non disclosed

Trends - MED-amin countries

As for maize, in the MED-Amin zone, harvesting is taking place for a majority of countries in September-October. In Albania, Algeria, and Morocco, it is more likely to occur in the summer months, while in Spain, it is mostly harvested between September and March.

On 24/11, MARS estimated that yields are expected to be slightly above average in the Mediterranean (at 6.92 t/ha) with the drought affecting Spain, Portugal and the Maghreb and heavy rainfalls that caused damage locally on dry soils in Greece, Turkey and southern Italy.

- **Albania**: The maize harvest is over for an expected harvest of 380,000 t (6.5 t/ha) as a result of good weather conditions in the country even though a slight rainfall deficit has been reported.
- **Egypt**: AMIS indicates a steady production forecast of 7.1 Mt.
- **France**: Harvests are 97% complete on 6 November on cultivated areas, an increase of 11%. The MARS bulletin expects yields of 9.22 t / ha, an increase of 13% over the previous year and +4.5% compared to the five-year average).
- **Greece**: Average grain quality is normal to good in most parts of Greece and weather is normal except in some areas where high temperatures and drought have been reported this summer. One region observed a decline in production due to the presence of the insect Diabrotica. In addition, low world prices and low grain quality could have discouraged producers. The MARS Bulletin reports yields up 3% over the previous year (-3.5% compared to the five-year average).
- **Italy**: The MARS Bulletin forecasts yields sharply down on the previous year (-15%) and the five-year average (6.7%).
- **Portugal**: At the end of October, Portugal notes a good progress of the harvests (95% of harvested surfaces against 50% the previous year). Due to a long and severe drought, the grain moisture level is low and the percentage of broken grains is high. Planted areas have been reduced due to low world prices and drought. The MARS Bulletin expects yields to be slightly higher than the previous year (+0.5%) but down on the five-year average -2.6%.
- **Spain**: Cultivation conditions are poor and surfaces slightly down. The MARS Bulletin forecasts yields of 10.9 t / ha, down 2.4% from the previous year.
- **Turkey**: The corn harvest is 90% complete at the end of October, a little behind the previous year, on stable surfaces. AMIS forecasts a production of 5.9 Mt against 6 Mt in 2016/17.

Barley

Global trends

In December, the USDA forecasts a global production of 141.86 Mt.

The European Union, Russia, Ukraine, Canada, Australia and Turkey are the largest producers of Barley.

- EU: The USDA projects a production of 58.68 Mt, down 2% from last year. MARS indicates yields down 2% at 4.73 t / ha.

- Russia: The USDA estimates barley production at 20.50 Mt in 2017/18, up 17% from last year.

- Ukraine: The USDA estimates the production of barley at 8.7 Mt in 2017/18 (-12%).

- Canada: The Canadian harvest season usually ends in mid-October. The USDA estimates barley production at 7.90 Mt in 2017/18 (-10%).

- Australia: The Australian harvest usually extends from October to January. At this stage, the USDA is forecasting production to be sharply down from the previous year (-40%) to 8 Mt.

- Turkey: The USDA estimates barley production at 6.40 Mt in 2017/18, up 35%.

- USA (3%): The USDA forecasts a sharp reduction of 29% to 3.1 Mt.

China will import more than forecast.

MED-Amin Area: Planting Progress - Barley

Country	Date of measurement	Estimated Area 2017 ('000 ha)	Area Evolution n/n-1 (%)	Planting progress (%)	Progress at the same date last year (%)	Estimated end of planting
Albania	30/11/2017	3 200	103	81	81	10/01/2018
Algeria	02/11/2017	1 230 000	102	6	15	janv-18
Egypt				nd	nd	
France	06/11/2017		nd	97	95	
Greece	6-12/11/2017	nd	nd	25	53	31/12/2017
Italy				nd	nd	
Morocco				nd	nd	
Portugal	31/10/2017	nd	nd	0	nd	31/01/2018
Spain				nd	nd	
Tunisia	26/10/2017	664 000	53	2	4	nd
Turkey	27/10/2017	2 740 000	100	95	100	

n.d: non disclosed

Trends - MED-amin countries

A majority of winter barley produced in the MED-Amin area is planted in October-November, with the exception of Portugal making it in January. Spring barley plantings are made in France in February-March, in Egypt in April-May. In Spain, barley plantings are made continuously between October and March.

- **Albania**: Barley plantings are 80% finished at the end of November on stable surfaces. The conditions are good.

- **Algeria**: Planting is low in early November (slightly behind last year). The USDA forecasts a decreased production, of 10,97 Mt.

- **France**: As of 6 November, barley planting is slightly behind schedule.

- **Greece**: At the beginning of November, plantings are 25% complete, which is behind the previous year. The lack of autumn rain delayed planting.

- **Morocco**: The USDA estimates production at 2 Mt in 2017/18.

- **Portugal**: Plantings did not start at the end of October. The soils are hardened by persistent drought (75% of the Portuguese continental land was in extreme meteorological drought, 25% in severe drought in 2017).

- **Tunisia**: At the end of October, barley planting is just starting in Tunisia for a sown area halved by half.

- **Turkey**: On October 27, plantings are almost complete for a majority of barley, slightly behind the previous year. Planting of spring barley will nevertheless take place in March.

Rice

Global trends

At the global level, the USDA is forecasting rice production of 483.47 Mt and AMIS of 500.82 Mt (mid December).

The main producing countries are China (146 Mt estimated by the USDA in 2017/18), India (107.5 Mt), Indonesia (37 Mt), Bangladesh (33 Mt), Vietnam (28 Mt. 45 Mt), Thailand (20.5 Mt), and Burma (12.95 Mt). Harvest of wet-season rice is ongoing, except in Indonesia, where dry-season rice is being harvested.

AMIS estimates that production forecast are stable, as upward revisions for Myanmar, Pakistan and the Philippines are partly outweighed by reductions for Bangladesh and Madagascar. According to the USDA, global rice production in 2017/18 was forecast in November 481.2 million tons (milled basis), down 2.6 million tons from the previous forecast and 5.4 million tons below the 2016/17 record. Bangladesh, China, India, the Philippines, and the United States account for the bulk of the harvested area decline. The average global yield of 4.49 tons per hectare is down from the year-earlier record of 4.52 tons, with a weaker yield in India as major factor.

Utilization forecast for 2017/18 are lowered due to lower expected feed use in Asia. Trade forecast in 2018 raised somewhat, mainly on higher than earlier anticipated exports by China and Myanmar.

Global rice trade in 2018 is projected at 45.1 million tons, down 0.6 million tons from the 2017 record and the second highest on record. Stocks (ending in 2018) are upgraded, mostly on larger expected carry-overs in Bangladesh, India and Viet Nam.

On the export side, shipments in 2018 are projected to be smaller from Argentina, Burma, Cambodia, Thailand, the United States, and Uruguay. In contrast, Australia, India, Pakistan, and Vietnam are projected to export more rice in 2018. On the import side, Egypt, Iran, Kenya, Malaysia, Nigeria, and Sri Lanka are projected to purchase less rice in 2018. In contrast, Bangladesh, Cote d'Ivoire, Madagascar, and the Philippines are projected to import more rice in 2018 than in 2017.

The evaluation of conditions by the end of November 2017 by GEOGLAM as part of AMIS Market Monitor indicated that crop conditions were generally favourable in Southeast Asia with exceptions in parts of Thailand and the Philippines.

MED-Amin Area: Harvest Progress - Rice

Country	Date of measurement	Estimated Area 2017 ('000 ha)	Area Evolution n/n-1 (%)	Harvest progress (%)	Progress at the same date last year (%)	Estimated end of harvest
Egypt				nd	nd	
France	06/11/2017	14 872	1	100	100	30/10/2017
Greece	6-12/11/2017	29 249	91	100	84	15/11/2017
Italy				nd	nd	
Portugal	31/10/2017	27 690	95	100	50	
Spain	10/10/2017	105 850	1	nd	nd	Nov. 17
Turkey	27/10/2017	116 000	100	90	100	Oct.17

n.d: non disclosed

Trends - MED-amin countries

For the majority of rice produced in the MED-Amin countries, harvests are spread between the months of September and November.

- **Egypt**: The main Egyptian rice crop generally takes place in October. The USDA forecasts production at 4.3 Mt (-10%). For AMIS, this production will be 4.4 Mt in 2017/18 against 4.3 Mt in 2016/17.

- **France**: This year France has stable cultivated areas.

- **Greece**: The Greek authorities note good growing conditions and expect good quality grains. However, the low world prices of previous years have sometimes resulted in a reduction in the area under cultivation. High temperatures and drought, especially in summer, have been reported in some areas.

- **Portugal**: On 31 October, Portugal has finished its rice harvest unlike last year (50% achieved at the same time) on cropped areas (-5% compared to the previous year). Production is low over the past 5 years and drought has affected grain quality.

- **Spain**: The ministry reports poor weather conditions and a small decline in harvested area.

- **Turkey**: At the end of October, the rice harvest is over on stable planted areas over the last four years. Good grain quality, following good weather conditions, is expected. AMIS forecasts stable production at 0.54 Mt in 2017/18.

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