CIHEAM
Centre International de Hautes Études Agronomiques Méditerranéennes

MED-Amin
Harvest & Planting Progress

August 2019

MED-Amin
Mediterranean Agricultural Market Information Network

www.med-amin.org

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Our website proposes a variety of services: reference documentations and training material for focal points, newsfeed dedicated to mediterranean cereal markets, handbooks and templates for the network's data collection... and more !

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Summary

This bulletin reflects the progress of harvests and planting in the MED-Amin countries based on data collected from the network's focal points and from various sources as appropriate (press releases from the Ministries of Agriculture or their Grain Offices, international organizations mentioned hereafter, private consulting companies or press articles).

For each monitored crop (wheat, barley, maize and rice), this information is preceded by a report of the world market and harvest outlook of the main producing countries. Figures are based on information provided by monitoring and analysis organizations, mainly the International Grains Council - IGC (checked early August at https://www.igc.int/en/markets/marketinfo-sd.aspx, the Grain Market Report of 25 July), the USDA (WASDE report of 12 August, the Crop Progress report of 12 August, the World Agricultural Production Circular WAP 8-19 of 8 August), FAO-AMIS (the GEOGLAM Crop Monitor and Crop Monitor for Early Warning of August - data from July 28 - and the GEOGLAM Market Monitor of July - data from June 28 -, and https://app.amis-outlook.org/#/market-database/view-and-compare), the European Commission - DG AGRI (Cereal Market Situation of 25 July, the JRC MARS Bulletin of 22 July and its update of 7 August, the JRC MARS Bulletin for North Africa of 14 June and https://agridata.ec.europa.eu/extensions/DashboardCereals/CerealsProduction.html updated on 25 July).

Content

Legend:

2019's Trends (on yields and/or production output) :

Outlook Favorable or exceptionnal Uncertain or variable Poor Not enough data at this stage

Wheat

World Trends

It is estimated that by the end of July about 80% of the AMIS wheat (accounting for more than 87% of world production) is harvested. The following are the general trends for wheat, as organizations such as AMIS and USDA are not distinguishing between soft wheat and durum wheat.

The supply of wheat is expected to return to an average level after the previous difficult campaign. Indeed, the main estimates indicate a global production exceeding 760 Mt. The IGC forecasts 763 Mt (on 25 July), the USDA 768 Mt (on 12 August) and AMIS 771 Mt (on 4 July), much better than last year (around 730 Mt). Downward revisions occurred in July after degraded conditions in the EU, Russia and Canada (see below).

EU (21 % of world production[1]) : Conditions have further deteriorated in Spain, Austria and Lithuania, affected since the spring by drought and heat. Heat waves associated with a pronounced water deficit have recently affected the regions of central and north-eastern Europe (Germany, part of France and Poland in particular) but with limited impacts on crops and harvests. The latest estimates, however, have been revised downwards for most consultancy bodies. In France, the leading wheat producer, harvest should get close to an historic year thanks to record yields achieved in Atlantic regions, the second largest in history after 2015 according to Agritel. The last MARS bulletin forecasts yields close to the 5Y average for soft wheat (6 t/ha) and for durum wheat (3.6 t/ha), +2% vs 2018, which hides a great disparity between countries. Wheat production is estimated at 151 Mt by DG AGRI (142.5 Mt of soft wheat and 8.5 Mt of durum wheat) as well as the USDA, +10% vs. 2018.

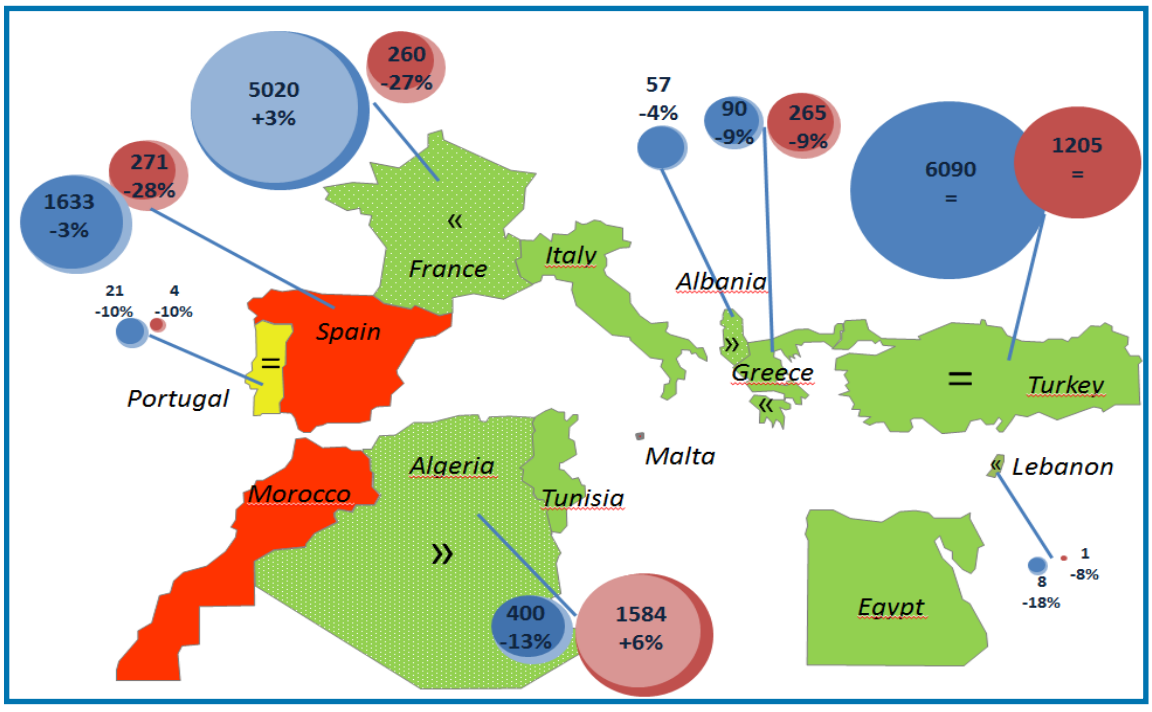
China (17 %) : Winter wheat harvest ends under generally favorable conditions, as well as for spring wheat. Production is estimated at 132 Mt (USDA) and 131 Mt (IGC), a stable level for the last 6 years.

India (13 %) : Production estimates at 101 Mt (USDA), 99 Mt (IGC), in line with the 2 last good years.

USA (8 %) : On 12 August, the USDA reports that the harvest, which is behind the five-year average, was only 89% complete for winter wheat and 8% for spring wheat. The quality of spring wheat is average, estimated at 69% as good to excellent, compared to 75% in 2018. A tiny fraction has been impacted by floods and excessive moisture conditions in the Great Lakes region. The USDA estimates the harvest at 54 Mt, +3 Mt vs 2018 but still lower than the 63 Mt of 2016. The IGC estimates at 50 Mt.

Russia (8 %) : Winter wheat conditions are mixed due to drought in the central and Volga districts. Planting of spring wheat globally ends under favorable conditions. Russian production is expected to continue its recovery compared to the previous two years but far from the 2016 record year (85 Mt). The harvest is 51% complete by 12 August on 14.2 million hectares according to UkrAgroConsult. Average yields are equivalent to 2018 (from + 1% to + 2%). The USDA estimates on 12 August a Russian wheat output at 73 Mt, down 2% from last month, but + 2% vs. 2018, including 54 Mt of winter wheat and 19 Mt of spring wheat. The IKAR consultancy gave an estimate the same day at 70 Mt, removing 6 Mt from the estimate of two weeks ago. Exports are also expected to fall to a range of 33 - 35 Mt (according to USDA, IGC, SovEcon) which should allow Russia to maintain its position as the world's leading exporter of wheat.

Harvest progress, areas and crop conditions for Wheat in the MED-Amin countries



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1 : Mean 2013-2015 (by AMIS)

MED-Amin : Harvest Progress - Wheat

MED-Amin Trends

Albania : Soft wheat production is down this year, estimated at 228 000 tonnes by the Ministry of Agriculture. The harvest ended on 20 August. Grains harvested are in "good" quality. The campaign was carried out under good conditions despite locally severe weather events during the first half of 2019. Yields are slightly higher than the 5Y average but on reduced harvested areas (-4%).

Algeria : The authorities estimate the area harvested at 1,583,500 ha in durum wheat (+ 6% vs 2018) and 400,500 ha in soft wheat (-13% vs 2018). The damaged surfaces unproper for harvest are 5% and 8% respectively. The harvest should end at the end of August. According to MARS (14 June), yields are estimated at around 1.9 t/ha (+ 20% vs 5Y average). The expected large production (4 Mt according to USDA 12/08) is expected to bring down significantly the country's imports this year, Algeria being one of the world's largest wheat importers.

Egypt : The USDA forecasts a slight increase in production compared to 2018 around 8.7 Mt (which is cropped mainly with irrigation), while AMIS forecasts 9.2 Mt for the world's largest wheat importer.

France : Wheat harvests took place on the usual dates. Apart from a start disturbed by very dry conditions during planting and a very hot and dry end of the development cycle with several canicular episodes, the crop conditions of soft wheat have been generally good in France. On 1 August, the Ministry of Agriculture estimeted the production of soft wheat to 38.2 Mt (+2.8% increase in harvested area vs Y/Y and an average yield high at 7.6 t/ha). For durum wheat, production is relatively low at 1.5 Mt and sharply lower than in previous years (with a record average yield at 5.7 t/ha but not enough to offset the acreage low at 260 000 ha (lowest since 1995), ie - 24.6% vs 5Y). The quality of the wheat is good, despite a phenomenon of nitrogen dilution related to high yields, with a protein level ranging from 10.5 to 12.5 (soft wheat) and from 13 to 14.5 (durum wheat) depending on the region.

Greece : The country has weather conditions generally favorable for winter crops, despite a difficult beginning of year 2019 with several extreme meteorological events. Soft wheat production is expected to drop sharply to 5.1 Mt from 2018 (DG AGRI) following a decline in harvested area (-9% vs 2018), despite a sharp increase in yields (+15% according to MARS). Durum wheat production is estimated at 1.8 Mt and + 7% yields vs 2018.

Italy : Not always favorable growing conditions in the southern regions have been offset by good conditions in the northern regions of the country. The heat wave combined with water deficit that occurred at the end of grain filling stage did not negatively impact yields. Production is up compared to last year or 5Y average, estimated by DG AGRI (25 July) at 3.1 Mt of soft wheat and 4.5 Mt of durum, benefitting from higher yields vs last year and 5Y averages, in particular for durum wheat (respectively + 11% and + 7%).

Lebanon : Harvested areas for both soft and durum wheat are down compared to 2018, -18% and -8% respectively. Crop conditions were average despite several extreme climatic periods during the campaign.

Morocco : The 2018/19 cereal season was particularly unfavorable due to the notable lack of rainfall in the central-western regions. The harvest is complete and results are expected to be well below historic levels reached in 2018. Wheat production forecast is 2.7 Mt for soft wheat, 1.3 Mt for durum wheat according to the Ministry of Agriculture. The USDA estimates total wheat production at 4.4 Mt, -40% vs 2018. Moroccan wheat imports are expected to reach 4.8 Mt in this 2019/2020 NMY, +17% vs 2018 and +11% vs 5Y average.

Portugal : Crop conditions have been characterized by water deficiency until June. Rainfall then allowed the crops to recover partly. Yields are generally 10% lower than last year for soft wheat and durum wheat but close to the 5Y average. Coupled with the reduction of 10% of the planted areas, the 2019 harvest, completed, is expected to decrease significantly compared to the 2017/18 campaign.

Spain : Harvests were poor this year, with particularly low yields and reduced acreage. This is even truer for soft wheat, -12% vs 5Y average and -28% vs previous year respectively (MARS, 22 July). The harvest is estimated at 5 Mt for soft wheat and 0.7 Mt for durum wheat, well below the record values of 2018 (Min. of Agriculture).

Tunisia : Output is significantly above averages benefitting from exceptional crop conditions with significant and well distributed rainfall in several regions (MARS). The harvest is over, with historical figures exceeding 11.7 Mq (millions of quintals) for durum wheat and 1.9 Mq for soft wheat, according to the ministry.

Turkey : The authorities and the USDA estimate the production slightly above 19 Mt, - 2 Mt vs the last WASDE report and unchanged vs 2018. The harvest is complete and the harvested area stable at 6.1 Mha for soft wheat and 1.2 Mha for durum wheat. Generally favorable growing conditions allow + 9% in yields vs M5Y (MARS).

Legend:

/ : Harvested areas of **Soft Wheat** in 2019 (value) / in 2018, and evolution x%. / : Harvested areas of **Durum Wheat** in 2019 (value) / in 2018, and evolution x%. Size proportional to area value.

Crop conditions favorable or exceptional / of concern / poor. Missing information.

Progress of harvest in 2019 (Week 31) : over (plein colour) / in progress (colour proportional to the progress).

= / « / » : Progress stable / delayed / in advance vs 2018

Maize/Corn

World Trends

AMIS countries account for 91% of global maize production between 2016 and 2018. Production forecast for 2019 is revised downwards in July, with a reduction in the forecast for China offsetting the noticeable improvement in Argentina (according to AMIS Market Monitor, 4 July). The USDA forecast on 12 August a 2019 world output of 1108 Mt vs 1123 Mt in 2018 (record year, - 1% change). AMIS forecasts on 4 July 1101 Mt vs 1116 Mt the previous year. In the southern hemisphere, harvests continue. Argentina and Brazil expect exceptional production. In the northern hemisphere, the United States has suffered abnormally wet and cool conditions for several weeks, which has delayed planting and emergence, suggesting diminished harvests in this major producing region. Conditions in Europe have deteriorated as well as in China due to heat and a prolonged water deficit (AMIS Crop Monitor of 28 July).

USA (35 % of world production[1]) : Harvesting usually starts in mid-September, but is expected to be significantly delayed this year due to (very) late planting as a consequence of flooding and waterlogging that occurred during several weeks in the Corn Belt regions. More than half of the planted areas are in "watch" status according to the AMIS Crop Monitor of August. Nevertheless, according to the USDA, production is expected to reach 353 Mt, even up from the July projection, but down globally for the second year in a row. AMIS estimates it at 330 Mt (15 July) and the IGC at 362 Mt while production was 385 Mt in 2018. For many experts, it is likely that the 2019 harvest will not reach such levels given the growing delays and large areas where sowing has been limited. The USDA Crop Progress of 12 August considers 57% of surfaces in good or excellent status / conditions against 70% last year and 63% on 5Y average. Early yield estimates predict 10.6 t/ha.

China (22 %) : Corn production in the southern region must have already been harvested, while that in the northern region is being harvested. Conditions are mixed as spring maize has experienced unusually low rainfall since planting in the central-eastern part of the country. Half of the surfaces are in "watch" status according to the AMIS Crop Monitor of 28 July. The USDA (12 August) and AMIS (15 July) forecast a harvest of 254 Mt (3 Mt more than in 2018) and the IGC 259 Mt.

Brazil (8 %) : The first safrinha / harvest (about 40% of total production) was completed in early summer, the second safrinha was 60% completed in mid-July according to CONAB under very favorable conditions. The harvested area covers 12.3 Mha (+ 7% vs 2018), while the yield is estimated at 5.9 t/ha (+ 25%). The 2019 harvest promises to be historic. CONAB expects this year a harvest of 98 Mt (against 81 Mt during the 2017/18 campaign), USDA: 101 Mt; AMIS: 95 Mt; IGC: 99 Mt.

EU (7 %) : Harvests did not start yet. The USDA forecasts a 2019 harvest of 65 Mt, a slight increase over the previous one, already good. The IGC forecasts only 64 Mt while AMIS expects 70 Mt. MARS forecasts in its bulletin of 22 July yields above the 5Y average (8.1 t/ha or + 6% compared to the 5Y average) in particular in the eastern and south-eastern countries which received abundant rainfall favorable to summer crops, like last year (Romania, Bulgaria, Hungary, Greece, Poland and Lithuania). Compared to the previous monitoring, the conditions deteriorated significantly in Western Europe (AMIS Crop Monitor of 28 July). USDA announces yields of around 7.5 t/ha.

Argentina (3 %) : The maize crop is 61% complete by 17 July according to BAGE with some slight delays due to heavy rainfall. The conditions are favorable or even exceptional for both spring and summer crops (AMIS Crop Monitor of 28 July) and lead to an exceptional crop forecast. AMIS anticipates a historic harvest of 56 Mt following the already good 2017/18 season; IGC: 53 Mt; USDA: 50 Mt.

[1] : Mean 2013-2015 (from AMIS)

MED-Amin: Planting Progress - Maize

MED-Amin Trends

The harvest usually starts in October in the MED-Amin countries.

Albania : According to the national authorities (MARD), the expected production this year is 381,400 tonnes out of 54,500 hectares cultivated (+ 1% vs 2018). Crops currently benefitted from favorable conditions. Irrigation improvements have been made. Corn planted areas are expected to increase over the next few years.

Egypt : Harvests usually take place in October-November. USDA estimates production at 7.2 Mt, up 6% from 2018 and AMIS at 7.4 Mt.

France : With good growing conditions in spring, corn planting and emergence went well in France. The following stages of development (including flowering) have been delayed because of the heatwave and very dry conditions experienced by the whole country. The general crop conditions are therefore degraded a little (only 60% evaluated as "good" to "very good" conditions in early August). At this very early stage, the estimation of yields (8.7 t/ha) and production (13.4 Mt) should be taken with caution. A downward revision is still possible because of the very dry conditions.

Greece : Maize is mainly irrigated. Plantings ended in late May, with normal growing conditions. The yields estimated by MARS on 22 July are good (10.9 t/ha), + 5% vs the 5Y average: these are the highest estimates of the EU countries. It should be noted that a large area was hit by severe thunderstorms on 10 July, which may have caused significant damage to the corn fieds. Output estimates slide vs 2018 to 5.0 Mt (DG AGRI) despite an increase of the planted area (+6%, 115,000 ha).

Italy : Growth of summer crops in the northern regions has benefitted from high temperatures, but remains below a "normal" year, with biomass accumulation still well below average. The potential recovery window is practically closed (update of 7 August of the MARS Bulletin). MARS anticipates yields of 9.4 t/ha, down 8% from the 5Y average, and the DG AGRI forecasts production at 6.4 Mt.

Portugal : Portuguese maize production is mainly irrigated (91%). Plantings of irrigated maize began mid-April and ended in late June. The planted area (79,340 hectares) is down + 5% for the fifth year in a row. Low temperatures in June delayed plant development. At this stage, the estimated yields are good (8.6 t/ha, + 3% compared to the 5Y average) and a production around 6.8 Mq (DG AGRI).

Spain : Plantings are over. Like winter crops, maize cultivation is expected to have suffered from particularly severe water stress since the beginning of the year, but to a lesser extent. Production is expected to fall, estimated at 3.6 Mt by DG AGRI, 4.1 Mt by the Ministry of agriculture as of end of July.

Turkey : Plantings of maize ended in June on 600 000 hectares according to the Turkish authorities. Harvesting is just beginning in the Middle Eastern part of Turkey (about 10% of production), while elsewhere it is in October, especially for maize planted in June. The JRC MARS bulletin announces good yields (9.5 t/ha), above the 5Y average (+ 2%). The USDA forecasts on 12 August stable production of 5.7 Mt and AMIS of 6.0 Mt.

See the reprensentation on planting progress, planted areas and crop conditions for Maize in the MED-Amin countries on Page 9

Barley

World Trends

The European Union, Russia, Ukraine, Canada, Australia, Turkey and the USA are the largest producers of barley. Together they account for 80% of world production on average between 2013 and 2016 (FAO figures). It should be noted that Argentina has for several years reached US production levels (around 4-5 Mt). The winter barley and spring barley crop experienced generally favorable conditions in the major producing countries. The IGC anticipates a historic global harvest of just over 150 Mt. This is corroborated by the USDA estimate of 12 August to 152 Mt (140 Mt in 2018).

EU (41 % of world production[1]) : Harvests are complete in most European countries. Despite the drought in the north-east and center of the continent, outlook on the EU's supply is good. The DG Agri (25 July) and the USDA (12 August) estimate barley production at around 60 Mt, the IGC to a historic level at 65 Mt. The MARS Bulletin of 22 July forecasted yields within the 5Y average at 4,9 t/ha, with great heterogeneity between countries (between the north and south of the EU, see below).

Russia (11 %): According to UkrAgroConsult on 12 August, 9.2 Mt of barley has already been collected on 34% (or 2.9 million hectares) of the total expected harvested area. Yields are higher than last year, at this stage of progress, on average 15% higher than in 2018. The USDA and the IGC estimate production at 18 Mt, + 10% vs 2018.

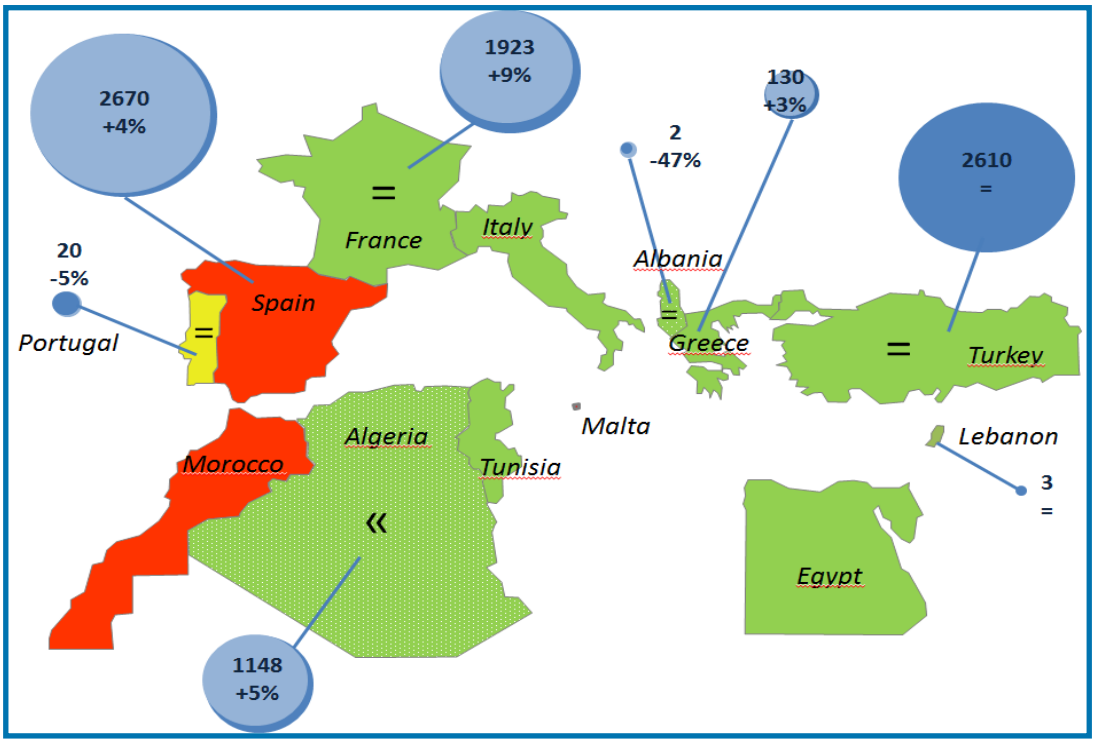
Canada (6 %): The campaign is running in very good conditions. Estimates forecast an abundant harvest: 10 Mt according to the AAFC on 25 July (+ 15% vs 2017/18 campaign) and the USDA on 12 August, 12 Mt even according to the IGC.

Ukraine (6 %): The barley crop has experienced favorable conditions, especially in recent weeks. In fact, rains following droughts and high temperatures helped to maintain the healthy state of the crops and even to improve the harvest potential. Production is expected to jump in 2019 to over 8 Mt according to the IGC and ProAgro Consultancy (+ 14% vs. 2018), still below the 2017 exceptional year that topped at 10 Mt.

Australia(6 %): The Australian harvest usually extends from October to January. At this early stage, estimates are expecting a harvest of 9 Mt within the 5Y average (IGC, USDA), well below the 2017 exceptional year (13.5 Mt), as a consequence of the recurrence of El Niño effects.

USA (3 %): The harvest follows the schedule observed in average the previous years. IGC anticipates a historic harvest of just over 5 Mt, a significant increase over the previous two years.

Harvest progress, areas and crop conditions for Barley in the MED-Amin countries



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[1] : Mean 2013-2015 (d'après AMIS)

MED-Amin: Harvest progress - Barley

MED-Amin Trends

The barley crop is being harvested for the majority of countries in the MED-Amin area between May and August. It is therefore completed by now for all.

Albania : Production this year is estimated at 7150 tons (Ministry of Agriculture), whose harvest ended on 20 August. Yields are slightly higher than the long-term average, only partially offsetting the significant decrease in planted area compared to the 2017/18 season (-47%).

Algeria : The country has increased its area harvested in barley, estimated at 1.15 million hectares by the Ministry of Agriculture (+5% vs. 2017/18 campaign). Barley crop has benefitted less from favorable conditions than wheat: the damaged areas amount to 20% but yields are exceptional around 1.4 t/ha (MARS bulletin of June). The USDA forecasts a substantial harvest of around 2.1 Mt, up 5% from last year.

Egypt : The MARS bulletin of June forecasts higher yields vs 5Y average (3.3 t/ha, +14%).

France : Harvests were 4 days behind 5Y average for winter barley, 4 days in advance for spring barley. The Ministry of Agriculture reports on 1 August high barley output of 13.4 Mt (record area at 1.92 Mha and very good average yield at 7 t/ha). . Protein levels are relatively low because of high yields.

Greece : The winter barley harvest ended in July in good or even exceptional conditions despite a difficult start in the season. Yields are estimated by MARS at 2.8 t/ha (+7% vs. 5Y average) and sharply decreased production at 7.1 Mt on +3% harvested area vs 2018.

Italy : MARS expects high yields for winter barley this year (4.1 t/ha, +5% from the 5Y average). DG AGRI forecasts production at 1.1 Mt, up from the average values.

Lebanon: Crop conditions were favorable and harvest ended in June on 3,000 ha, same as in 2018.

Morocco : The campaign was characterized by unfavorable conditions for barley as for wheat. The sharp drop in production is estimated by the Moroccan authorities at 1.7 Mt. The USDA estimates it at only 1 Mt, -66% compared to the exceptional crop of 2018.

Portugal : This is a campaign within the 5Y average for barley (winter) despite the significant water deficit that occurred during spring and early summer. The comparison with last year, on the other hand, is very unfavorable to the current campaign: harvested areas have decreased by 5% and yields falls by 10% according to the Ministry of Agriculture. Production should not exceed 80 000 tonnes against more than 100 000 tonnes in 2018 (DG AGRI).

Spain : Spain currently expects a production of 6.7 Mt, down significantly from the previous year (9 Mt). This decline is due to significantly lower than average yields, which is due to unfavorable crop conditions, especially for spring barley (-5% for winter barley, -11% for spring barley vs 5Y averages).

Tunisia : The harvest ended in July and is "historic" compared to 2018 and 5Y average, having benefitted from very favorable crop conditions, with significant rainfall levels. The authorities estimate it at 7.7 million quintals. Yields are in the 5Y average, considering also a typical significant interannual variability.

Turkey (5% of world production[1]): The harvest is over, on a harvested area of 2.6 Mha similar to 2018. The USDA estimates the Turkish harvest at 8 Mt, up 14% vs 2018. Good yields are forecasted (2.8 t/ha, + 8% from the 5Y average according to the MARS bulletin of July), benefitting from generally favorable crop conditions, despite significant variations within and between regions.

Legend:

/ : Harvested areas of **Barley** in 2019 (value) / in 2018, and evolution x%. Size proportional to the area value.

Crop conditions favorable or exceptional / of concern / poor. Missing information.

Progress of harvest in 2019 (Week 31) : over (plein colour) / in progress (colour proportional to the progress).

= / **«** / **»** : Progress stable / delayed / in advance vs 2018

Rice

World trends

According to the FAO, 1/3 of the production recorded for the current season is performed by the end of August. Production in 2019 is revised slightly down from the June estimate, as forecasts have been reduced, mainly in the United States, partly offset by better prospects in Egypt and several other countries (by AMIS Market Monitor, 4 July). This year, crop conditions are still generally favorable, in the average. In China, conditions are generally favorable for all three seasons rice crops. In southern South-East Asia, wet-season rice planting has started in the northern countries, while it is near completion in Indonesia and dry-season rice plantings are just beginning. The USDA forecasts at this stage an output stable from the previous year, estimated at 498 Mt (499 Mt in 2018 and 495 Mt in 2017), while the IGC and FAO/AMIS announce an increase to 504 Mt and 516 Mt respectively.

Utilizations for this 2019/20 commercial year are expected to increase by another 1.4%, with a higher food demand. Trade contracted by 3.1% in 2019 before rebounding to a record level in 2020 of around 49 Mt traded. Finally, stocks (2019/20 reports) have been reduced, mainly reflecting lower stocks forecasts in the Philippines and the United States.

China (29 % of world production[1]) : At the end of August, it is estimated that China produced about 33% of the production that will be accounted for in the 2018/19 Marketing Year. The crop conditions are generally favorable while harvest of the early variety rice and planting of the late variety rice are in progress. The cultivation of the rice "one season" variety, at the vegetative stage, knows favorable conditions. However, rainy and cloudy weather disrupted crops in the south of the country (AMIS Crop Monitor of 28 July). The USDA estimates on 12 August the production at 146 Mt slightly lower than in previous years. AMIS and IGC expect production to decrease slightly (143 Mt and 147 Mt respectively).

India (21 %) : It is generally considered (FAO-CBS, USDA-PSD) that the Indian campaign begins in October. AMIS Crop Monitor of 28 July indicates that Kharif rice transplanting is underway in many states under favorable conditions despite the delay in the start of the monsoon season. Planting progress is increasing and total planted area is expected to increase further by the end of the planting window. The USDA estimates stable production at around 115 Mt. For AMIS and IGC, production continues to rise to over 117 Mt.

Indonesia (9 %) : 80% of the annual harvest is usually produced between January and August. The harvest of wet season rice is almost complete and yields are expected to be near average. Dry season rice plantings continue under favorable conditions with adequate water supplies for irrigation (AMIS Market Monitor, 4 July). Production is stable, estimated at 37 Mt by the USDA, 38 Mt by the IGC and 47 Mt by AMIS.

Vietnam (9 %) : 85% of the annual harvest is produced between January and August. The conditions are favorable, while the harvest of winter-spring rice (dry season rice) has started in the north and ends in the south. Planting of summer-autumn rice (wet season rice) was also completed in the south under favorable conditions (AMIS Crop Monitor, 28 July). The USDA as AMIS are projecting a steady output around 28 Mt.

Thaïlande (6 %) : The wet season rice is at tillage stage under conditions to watch due to several unusually dry months (AMIS Crop Monitor, 28 July). The harvest forecast is based on a national production revised downwards compared to July, around 20-21 Mt, up very slightly vs 2018 (USDA, AMIS, IGC). The decline in monthly production estimates is due to a decline in area, as insufficient precipitation in July resulted in below-average water levels in the two main reservoirs, Bhumipol and Sirikit, in the northern region of the country. These reservoirs are essential for arid-zone rice cultivation - mainly irrigated - since they provide about 80% of irrigation water to the rice-growing areas of the northern and central lowlands.

[1] : Mean 2013-2015 (from AMIS)

MED-Amin: Planting Progress - Rice

MED-Amin trends

For the whole MED-Amin area, the rice harvest has not started, usually taking place between Sep.-Nov.

Egypt : The main rice harvest takes place in October. The USDA estimates production high at 3.1 Mt due to the increase in planted area (0.5 Mha) and yields (8.8 t/ha). AMIS estimates it at 3.4 Mt.

France : The authorities announce a 13% increase in the planted area this year (14,100 ha). Harvests are usually carried out in September-October.

Greece : Planting ended on 10 June with stable acreage (27,000 ha) under favorable development conditions.

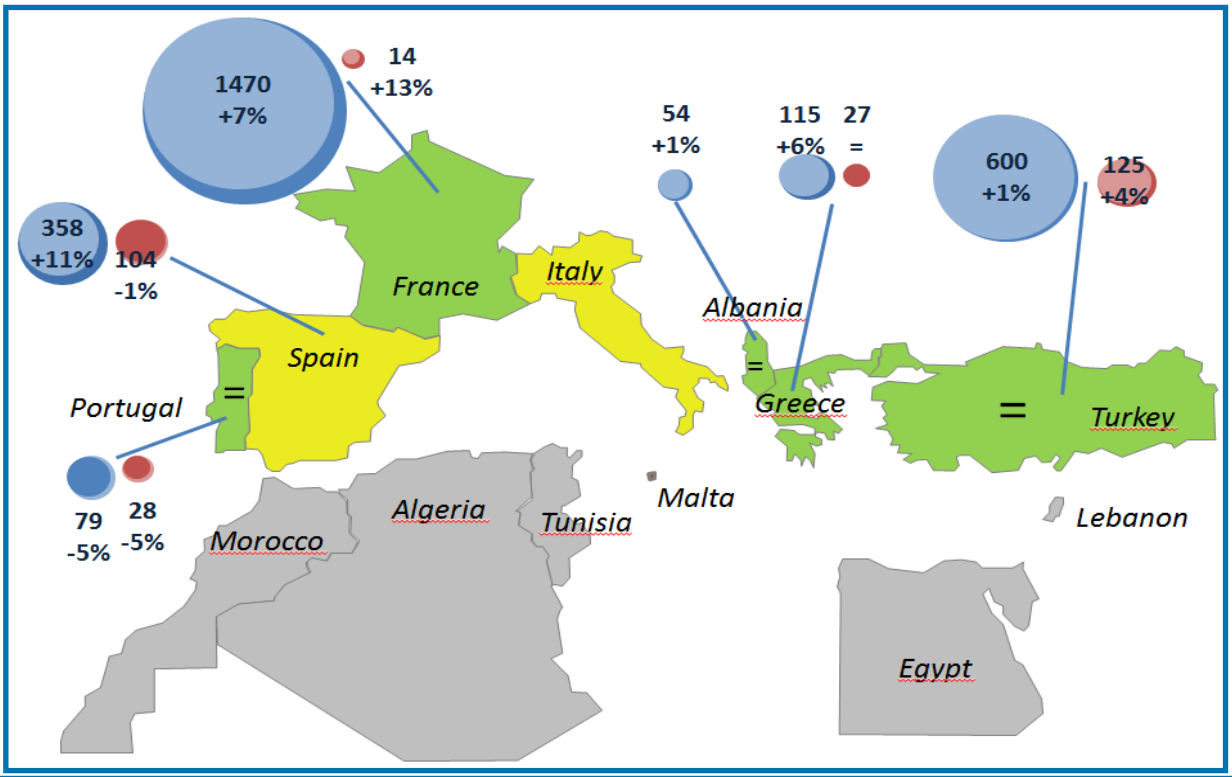
Italy : No data available.

Portugal : Planting of rice started in mid-April and ended in early June. The planted area decreases like the other crops of this bulletin, around - 5%, as a result of the severe water stress during the planting period. Crop conditions are normal even though cool June temperatures delayed plant development.

Spain : Crop conditions should have followed trends as for maize (see before), which are rather favorable at this stage but should be monitored in the coming weeks given the noticeable water deficit. Acreage is slightly down -1% vs 2018 at 104,000 ha and harvest early estimated at 0.8 Mt.

Turkey : Authorities announce planted areas up to May of 125,000 ha equivalent to last year. The rice harvest usually takes place between September and October. The USDA forecasts steady production of 0.5 Mt, AMIS 0.6 Mt (+ 4% vs 2018).

Planting progress, planted areas and crop conditions of Maize and Rice crops in the MED-Amin countries



Legend:

/ : Planted area of **Maize** in 2019 (value) / in 2018, and evolution x%. / : Planted area of **Rice** in 2019 (value) / in 2018, and evolution x%. Size proportional to planted area value.

Crop conditions (maize, rice) favorables or exceptional / of concern / poor. Missing information.

Progress of planting in 2019 (Week 31) : over (plein colour) / in progress (colour proportional to the progress).

= / **«** / **»** : Progress stable / delayed / in advance vs 2018

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