CIHEAM

International Center for Advanced Mediterranean Agronomic Studies

MED-Amin
Harvest & Planting Progress

August 2020

MED-Amin

Mediterranean Agricultural Market Information Network

www.med-amin.org

Disclaimer

This document presents 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 23 July), the USDA (WASDE report of 12 August, the Crop Progress report of 10 August and Wheat Outlook of 14 August), FAO-AMIS (Market Monitor of July (data as of 2 July) and GEOGLAM Crop Monitor for AMIS of July (data as of 28 July), and https://app.amis-outlook.org/#/market-database/view-and-compare), the European Commission - DG AGRI (JRC MARS Bulletins of 24 August, the JRC MARS Bulletin for North Africa of 15 June and https://agridata.ec.europa.eu/extensions/DashboardCereals/CerealsProduction.html updated on 30 July).

Site web

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 !

News

Follow the latest news on the grains markets from our twitter account on : https://twitter.com/MEDAmin_network, from our news review on https://www.scoop.it/topic/med-amin and reading our bi-monthly MED-Amin newsletter directly from the MED-Amin website https://www.med-amin.org/fr/ressources/newsletters-med-amin.

Content

Wheat

Market

From the USDA latest Wheat Outlook of 14 August 2020, here are the major updates since last month evaluation and highlights:

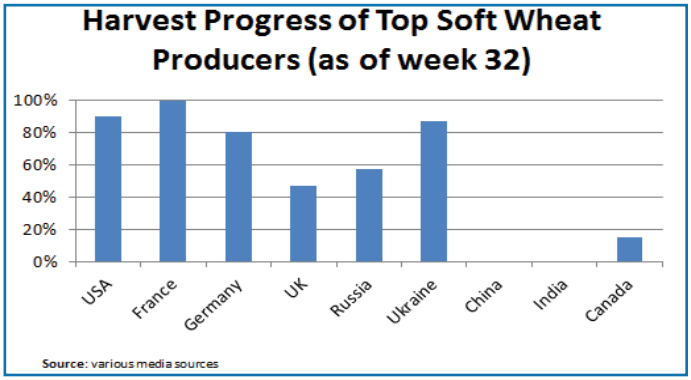
- Wheat production is revised upwards m/m, mostly reflecting higher production in India and improved prospects in Australia and Russia outweighing a downward revisions for the EU and the UK and Ukraine. The supply of wheat is expected to return to an average level after the previous difficult campaign. Main estimates indicate a world production exceeding 760 Mt, between 761 and 766 Mt (USDA as of 12 August, AMIS as of 2 July and IGC as of 27 August), a global supply much better than last year (around 730 Mt depending on estimates).
- Utilization in 2020/21 is still expected to decline from the 2019/20 estimated level given a likely contraction in demand for both feed and industrial use.
- Trade in 2020/21 (July/June) is expected to point to a modest expansion from 2019/20, boosted by large export supplies and competitive prices.
- Stocks (ending in 2021) will likely arise further, on bigger buildups in countries where production prospects have improved, now expanding by 3% from opening levels. This move is particularly relevant in China.

Prices

The prices of wheat changed little month-on-month. Despite a weaker US dollar and concerns about production prospects in Europe, the Black Sea region and Argentina, slow trade activity and early expectation of a strong production recovery in Australia kept the average July value at around the same level as in the previous month, almost 2% higher than in July 2019. Price movements were often linked to weather developments for world crops, while the advancing northern hemisphere harvest added seasonal pressure. Uncertainty about the impact of COVID-19 on demand continued to weigh on price sentiment. So far, the trade activity pace is low compared to last year at the same period, with reduced exported volumes for instance from Russia, the EU and Ukraine (Sizov Report, August).

Crop conditions and Harvest Progress

In the northern hemisphere, conditions remain mixed in the EU, Russia and Ukraine, while they are generally favourable in the US, Canada, China and Kazakhstan. In the southern hemisphere, conditions are favourable even partly exceptional in Australia and Brazil while under watch in parts of Argentina (the Rosario Grain Exchange had just revised down its forecast to 18 Mt). Soft Wheat and Durum harvest is well advanced in the most productive countries e.g. USA, France, Germany, Turkey or Russia, with generally an advance compared to last year at the same period (see the graph below).



Durum

Due to larger area forecast for Canada, world production is estimated 0.2 Mt higher than last estimate at 34 Mt (+2% y/y), incl. 7.4 Mt in the EU-27, 6.1 Mt in Canada (+23%) and 3 Mt in Algeria (-6%). According to Agriculture and Agri-Food Canada (AAFC), durum planted area for harvest in 2020 increased 16% on the year and production is expected to increase 30% from 2019/20 to 6.5 Mt. Canadian durum exports are expected to remain stable year-over-year at 5.3 Mt.

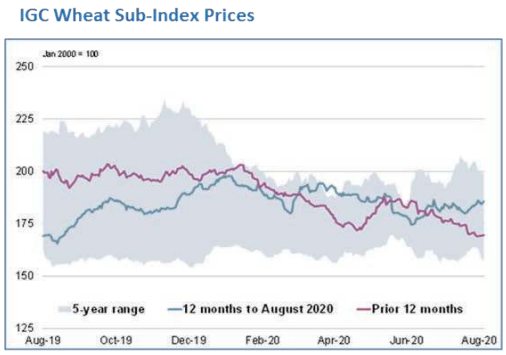
As a result of excess dryness, Morocco output was lowered to 0.8 Mt (-40%), a 13-year low. Consumption is expected to be broadly unchanged y/y at 35 Mt, incl. 32 Mt food use and 1 Mt feed use (-11%). Stocks are seen reaching 7.7 Mt (-10%), the lowest level since 2014/15.

Top Wheat Producers

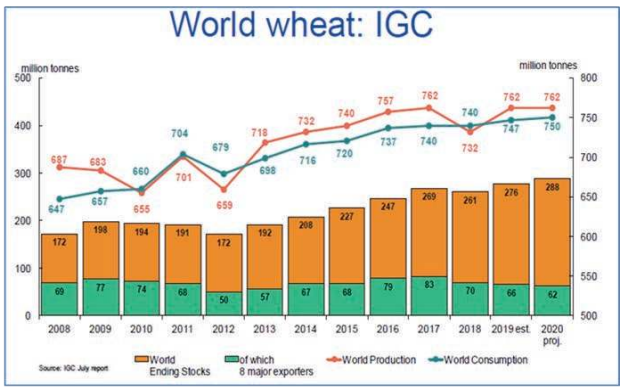
It is estimated that by the end of July about 80% of the AMIS wheat (accounting for more than 87% of world production) is harvested. The following are the general trends for wheat, as organizations such as AMIS and USDA are not distinguishing between soft wheat and durum wheat.

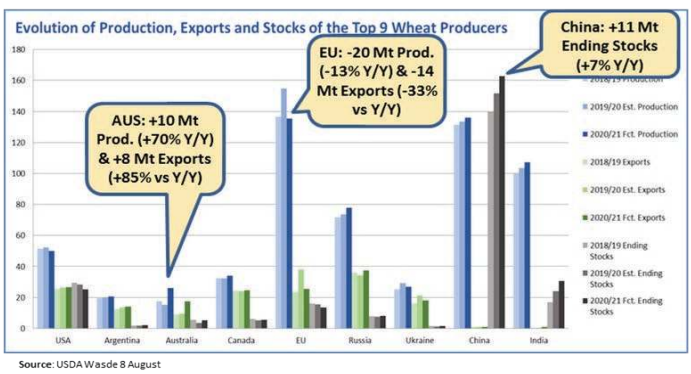
- **EU** (18-20% of world production[1]): According to the AMIS Market Monitor of July, conditions remain under watch as persistent dryness across north-western and central Europe along with parts of Romania and Bulgaria have reduced yield prospects. This campaign was characterized by harsh weather conditions in top EU producers like France, Germany and UK. On the other hand, conditions were favourable and even exceptional in Spain, Portugal and generally Italy. The MARS bulletin of 24 August forecasts yields below to the five-year average for both soft wheat and for durum (drop of 4% each), reaching hardly 5.5 t/ha and 3.4 t/ha respectively. EU wheat production is estimated at 125 Mt by DG AGRI as of 30 July (i.e. -18% vs 5Y average, of which 118 Mt of soft wheat), 122 Mt by IGC as of 28 August.
- **China** (17-18%[1]): Winter wheat harvest ends under generally favorable conditions, as well as spring wheat. Production is estimated at 135-136 Mt (USDA, IGC), about an increase of 2Mt vs 5Y average.
- **India** (14%): India is heading toward a fourth record wheat harvest, estimated at 107 Mt, despite relevant Mosoon precipitations.
- **Russia** (10%): Winter wheat conditions are mixed going into harvest with dryness earlier in the season affecting the south while there are favourable to exceptional conditions further north in parts of the Central and Volga districts. Spring wheat sowing is complete under favourable conditions. Russian farmers have harvested 49.8 Mt of wheat as of 8 August, 14% ahead of this time last year. According to the Ministry of Agriculture, the total average yield is up slightly this year at 54.6 bu/acre (3.67 t/ha). Russian grains production is expected to continue its strengthening with a wheat output forecasted at 78-82 Mt depending on the most recent estimates, not far from the 2017 record year (86 Mt). Exports are expected to surge to 37 Mt which likely allows Russia to maintain its position as the world top wheat exporter.
- **USA** (7%): On 12 August, the outlook for 2020/21 U.S. wheat this month is for increased production offset by lower imports, higher exports, and lower ending stocks. The USDA estimates the harvest at 50 Mt, at a 3Y low. This month, wheat production is raised to 1,838 million as increased Hard Red Spring (HRS) and Durum production more than offsets lower winter wheat production as indicated by the NASS August 12 Crop Production report. Projected 2020/21 exports are raised 25 million bushels to 975 million on lower production for several key competitors, most notably the EU. With offsetting supply changes and increased use, ending stocks are lowered 17 million bushels to 925 million. If realized, these will be the lowest wheat ending stocks in 6 years. Good weather is helping speed the 2020 HRW harvest in the northern United States. South Dakota is close to 90% complete, Montana 20%, Idaho 21% and Washington 25%, with favorable conditions ahead to build momentum.

WHEAT

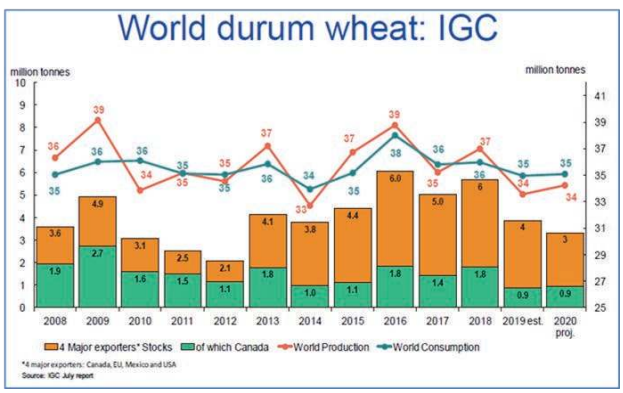


Source: IGC August Report





Source: USDA Wasde 8 August



[1] : Range 2014-2020 (by USDA)

Maize/Corn

Market

Highlights from the AMIS Market Monitor of July:

- The biggest maize harvest in history is scaled up on improved crop prospects in Brazil and the EU, estimated around 1166-1208 Mt depending on estimates; almost 6% higher than last year's record. In the southern hemisphere, harvest is wrapping up in Argentina and advancing in Brazil. In the northern hemisphere, conditions are generally favourable with recent improvements in Europe. The EU corn production is lowered, mostly reflecting reductions for Romania and France that are partially offset by increases for several countries including Poland, Italy, and Hungary (USDA wasde Aug. 12). Ukraine corn production is forecast higher, largely reflecting higher expected area.
- Utilization in 2020/21 nearly unchanged m/m and set to increase by 2.7% from 2019/20, reflecting a stronger y/y expansion in feed use and a modest rebound in industrial use.
- Trade for 2020/21 (July/June) is forecast at an all-time high of 175 Mt (+2% vs 2019/20), driven by continued strong import demand, ample export availabilities and relatively low international prices.
- Stocks (ending 2021) revised downwards, but still forecast to increase by over 10% from the previous season to a new record, with most of the increase in the US.

Prices

The IGC GOI maize sub-Index recorded its first m/m gain since January, rising by an average of 4%, with advances across all key origins. Gains in the US were linked primarily to tight elevation capacity at Gulf ports and river traffic bottlenecks, but with firmer demand also broadly supportive. While Argentine quotations also ticked higher across the month, prices remained well below other exporters, aided by a weak peso. There was little apparent harvest pressure in Brazil, where FOB values strengthened on solid overseas buying interest. Spot quotations in Ukraine moved higher on tightening old crop availabilities. Maize prices were supported by reduced US area and strong export demand and also tightening supply in China.

Top Producers

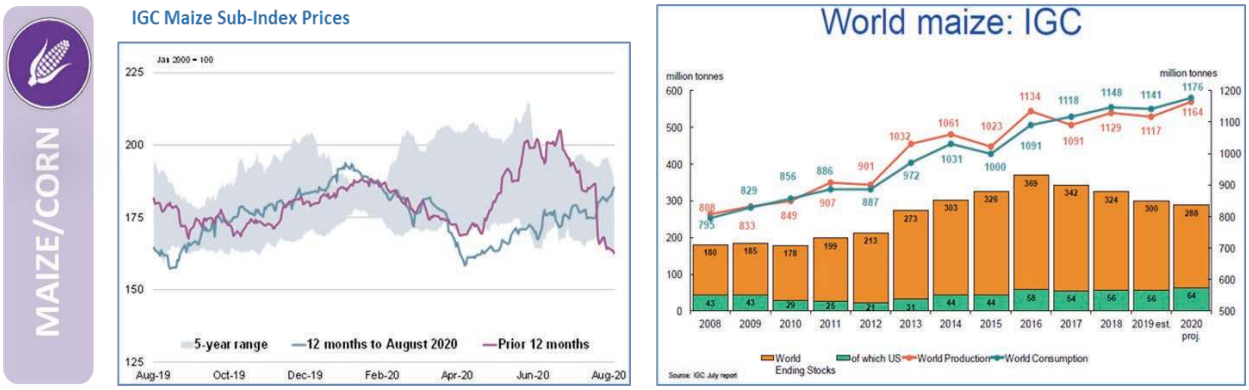
AMIS countries account for 92% of global maize production.

- **USA** (35% of world production[1]): Harvesting usually starts in mid-September. Conditions are favourable across the country. According to the USDA, production is expected to reach an historical level of 388 Mt. The USDA Crop Progress of 10 August considers 71% of surfaces in good or excellent conditions against 57% only last year. Planted area is similar to the two last years. Crop progress is in line with the 5Y average pace. First yield estimates indicate 11.4 t/ha.
- **China** (22%[1]): Conditions are favourable for both spring-planted and summer-planted maize with sown area expected close to the 5-year average. Corn production in the southern region must have already been harvested, while that in the northern region is being harvested. The total harvest is estimated at approx. 260 Mt (USDA, IGC), stable and in line with the 5Y average.
- **Brazil** (8%): The harvest began for the summer-planted crop (larger season) under exceptional conditions in the Central-West and Southeast regions. However, conditions in the south are poor as a persistent lack of rain during the vegetative development phase, particularly in the state of Parana, has reduced expected yields. It is forecasted a historic production of 102 Mt for Brazilian CONAB (31 July) i.e. up 2% vs 2019, 107 Mt for USDA (12 Aug.). The first *safrinha* (crop harvest) has finished the harvest and the second *safrinha* in process (56% done by 31 July). It still remains harvests of third *safrinha* in North and North-East regions that counts for 1.5% of the national production.
- **EU** (7%): Conditions have largely improved owing to recent rainfall and are now favourable. Harvests did not start yet. The 2020 harvest is estimated between 68 and 70 Mt (EU DG Agri, USDA), a slight but continuous

[1]: Range 2014-2020 (by USDA)

increase year after year. The yield forecast for grain maize remain well above the 5-year average (8.2t/ha, +8% vs 5Y average), reflecting a sustained positive outlook in all of the main producing countries (Romania, Bulgaria, Hungary, Greece). Compared to the previous monitoring, the conditions deteriorate significantly in Western Europe (AMIS Crop Monitor of 28 July). USDA announces yields of around 7.5 t/ha.

- **Argentina** (3%): Dry weather is facilitating the harvest of both the spring-planted and summer-planted crops under generally favourable conditions except for the provinces of *San Luis* and *Entre Ríos* where conditions are poor. As of 22 July, maize harvest was 95% complete (BAGE), with a yield of 8.2 t/ha. Planting of the 2020/21 crop will only start in September. The maize area will likely tend close to 6.3 million hectares, similar to the area of last season which gathered a record harvest. From the point of view of the agroeconomic' fundamentals ', the logic of the producer should be to increase the area of corn at thje expense of soybeans decrease. The harvest, forecasted around 50-52 Mt this year (AMIS, USDA), 58 Mt according to the Ministry of Agriculture of Argentina.



Source: IGC August Report

Barley

Market and Prices

The IGC anticipates another historic global harvest of 153 Mt just after the highest of last year at 156 Mt. The last USDA estimate of 12 August lowered barley production for the EU, Kazakhstan, Argentina, and Ukraine.

The prices of barley moved a lot in one year. After topping all commodities, international prices decreased significantly dunring the first months of the covid pandemic (triggered by the plunge of maize prices). Lattely, they rose again but make barley still a competitive feed alternative from wheat.

Crop conditions and Harvest Progress

The winter barley and spring barley crop experienced generally favorable conditions in the major producing countries. In general, barley harvest goes earlier than for wheat crops and the same progress trend as wheat still runs this campaign.

Top Producers

The EU, Russia, Ukraine, Canada, Australia, Turkey, Argentina and the US are the largest producers of barley. Together they account for 80% of world production on average between 2013 and 2016 (FAO figures).

- **EU** (37-42% of world production[1]): Harvests are complete in most European countries with pace generally advanced in Germany, Spain, France and UK. The drought triggered reduced prospects for winter barley more than spring barley in the north-west and south-east EU (France, Germany, Hungary, Romania, Bulgaria) counting for the most producing regions, generating a 9% drop from 5Y average. The drop is also due to the continuously reduced acreage in the EU. The DG Agri and the IGC estimate barley production at 55 Mt far from the historic level at 66 Mt in 2008. The MARS Bulletin of 24 August revised upward the EU barley yields by boosted spring

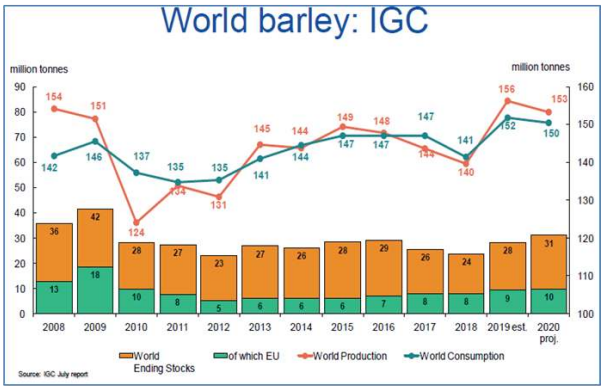
[1] : Range 2014-2020 (by USDA)

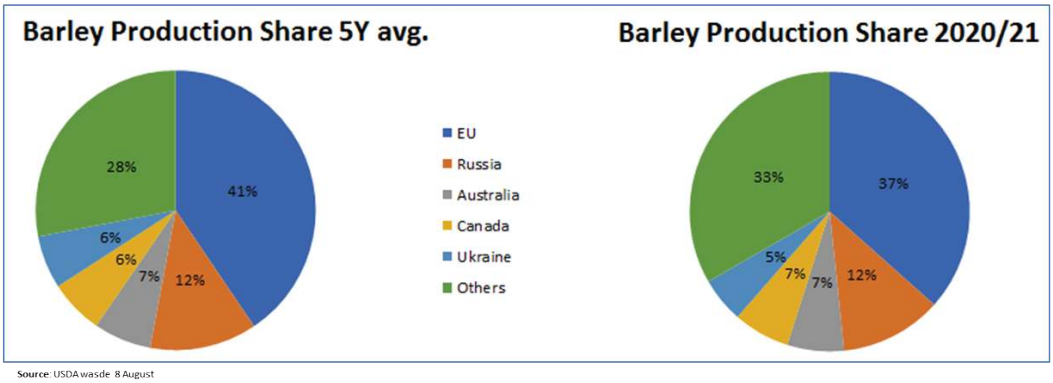
barley (+9.1% y/5y avg), reflecting improved or continued favourable conditions in almost all major producing countries.

- **Russia** (10-14%[1]): For IGC, barley output will reach 18Mt. Total acreage decreased by 3% to 8.5 Mha (92% of it spring barley), but still above 5Y average (Rosstat). Rusagrotrans raised its latest estimate to 21 Mt, record level since 2008. Harvest process is a bit delayed in the European Russia regions, but in advance in northern regions. As of 14 August, Russian farmers harvested 13 Mt of barley from 4.3 Mha (50% of planted area). Yields are mixed in comparison with last years, because of drought and hot temperatures that affected the Black Sea region. Russia remains the most productive country.
- **Australia** (5-9%[1]): The Australian harvest usually extends from October to January. At this early stage, estimates are expecting a good harvest above 10 Mt, second after the historic high of 2016 and much better than 5Y average, which could boost exports during this NMY despite the trade conflict with China.
- **Canada** (5-8%): As harvest begins, Canada is poised to harvest a large barley crop around 10 Mt with most areas of the Prairies having received sufficient moisture this growing season. While some pockets have been too dry, most of the grain growing regions have received sufficient to excess amounts of moisture this season.
- **Ukraine** (5-7%): The barley crop has experienced favorable conditions, despite lately above-normal temperatures. Production is expected to be close to 2019 level, over 8 Mt according to the IGC and UkrAgroConsult, good yields level offsetting the reduced acreage of this year.

BARLEY

Source: IGC August Report





Source: USDA wasde 8 August

[1]: Range 2014-2020 (by USDA)

Rice

Market

Highlights from the AMIS Market Monitor of July:

- Rice production in 2020 down slightly m/m, around 500-505 Mt (USDA, IGC) due to drops in China (-2Mt), Thailand and Vietnam largely offsetting improved prospects in South America, namely for Brazil, Bolivia and Uruguay.
- Utilization in 2020/21 seen at an all-time high, as food assistance programmes and more ample availabilities boost food use in Asia and Africa.
- Trade in 2021 essentially unchanged m/m, with greater exports by India and Thailand expected to support much of the forecasted y/y expansion.
- Stocks (2020/21 carry-out) raised marginally, but still seen down slightly y/y, as continued build-ups in the major rice exporters are outweighed by drawdowns in China, but also in Indonesia and Bangladesh.

Prices

Average rice prices weakened fractionally over the last month yet remain elevated compared to one year ago. Despite slow buying interest, tight paddy availabilities and currency movements underpinned Thai white rice quotes, while Indian offers were supported by an uptick in demand and as logistical issues continued to hamper trade. In contrast, offers from Viet Nam declined amid improving paddy supplies from the summer/autumn crop and slower than anticipated demand, while values in Pakistan also softened on slow trade and currency movements.

Crop conditions and Harvest Progress

In China, conditions are generally favourable albeit with some additional flooding in the southwest. In India, transplanting of Kharif rice is complete. In Southeast Asia, conditions are favourable for wet-season rice in the northern countries, while in Indonesia, dry-season rice remains delayed due to a protracted conclusion of the wet-season cycle.

Top Producers

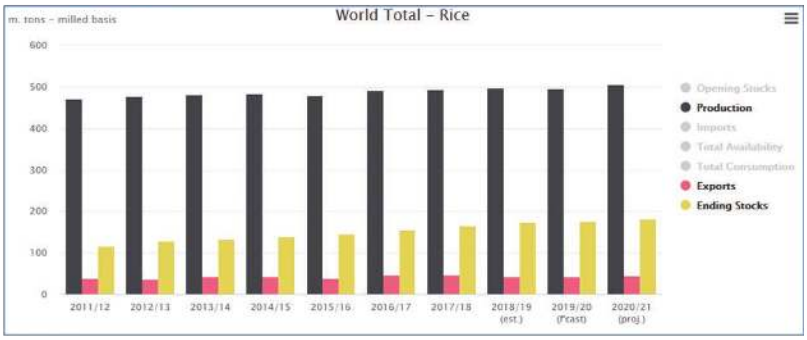
- **China** (29% of world production[1]): At the end of August, it is estimated that China produced about 33% of the production that will be accounted for the current Marketing Year. Harvesting of early-season rice is wrapping up under favourable conditions. Single-season rice and late-rice are under generally favourable conditions, albeit with some recent flooding along the Yangtze River (AMIS Crop Monitor of 28 July). The USDA estimates on 12 August the production at 147 Mt slightly lower m/m and similar to 2019, 148 Mt for IGC.
- **India** (21%[1]): It is generally considered (FAO-CBS, USDA-PSD) that the Indian campaign begins in October. AMIS Crop Monitor of 28 July indicates that conditions are favourable for Kharif rice with transplanting still in progress in many states. Sown area is up this season compared to last year. The USDA and IGC forecast a stable production over 118 Mt.
- **Indonesia** (9%): 80% of the annual harvest is usually produced between January and August inclusive. harvesting of wet-season crops is wrapping up with a reduction in yields and harvested area compared to last year due to the prolonged drought. Sowing of dry-season crops continues to be behind schedule due to the protracted wet-season crop harvest, however the continuing rainfall into the dry season is beneficial. 2/3 rice area is concerned by drier than average conditions and remains in "watch" crop conditions (Crop Monitor for AMIS, August). Estimates predict a production slightly up y/y, around 35 Mt (USDA, IGC, AMIS).
- **Vietnam** (9%): 85% of the annual harvest is produced between January and August inclusive. The harvest of wet-season (summer-autumn) rice in the south is beginning under watch conditions due to drought with slightly

[1] : Mean 2012-2015 (by AMIS)

lower yields expected compared to last year. In the north, wet-season (summer-autumn) rice is in the sowing to tillering stages under favourable conditions.The USDA and AMIS project the 2020 output around 27-28 Mt.

- **Thailand** (6%): Conditions are favourable for wet-season rice with ample rainfall compared to last year, supporting sown area expansion. Tropical storm Sinlaku brought minor flooding to the north and northeast regions but left no significant damage to rice fields. The harvest forecast rebounds to 20 Mt (USDA, AMIS, IGC), 2 Mt more than 2019.

Rice World Balance



Source: IGC 31 July

IGC Rice Sub-Index Prices

Source: IGC August Report

MED-Amin Countries

Albania

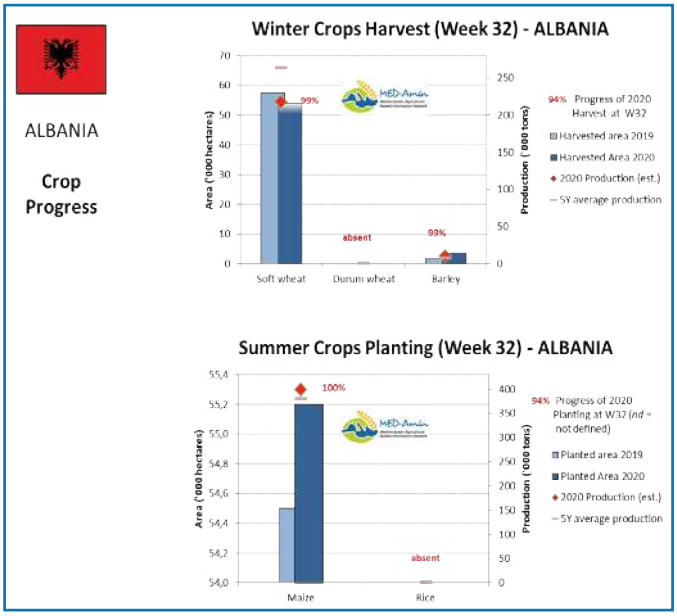
Due to smaller planted crop than 2019, soft wheat harvest on 54.000 ha, (-4% y/y) has ended by mid-August with reduced output (see graphs beside). Production is estimated at 218,350 tons with average yields around 3.9t/ha, and good quality grains. The 2019-2020 campaign for both winter and summer crops was favourable with the good climate conditions. On contrary, barley crop increased significantly y/y and harvest now over benefitted from good yield level (around 3.5-4t/ha) to expect 9,500t (+12% vs 5Y average). Considering corn, planting has ended at the end of July on 55,200 ha, a similar level to last year. First estimates give a 2020 production close to 400,000 tons.

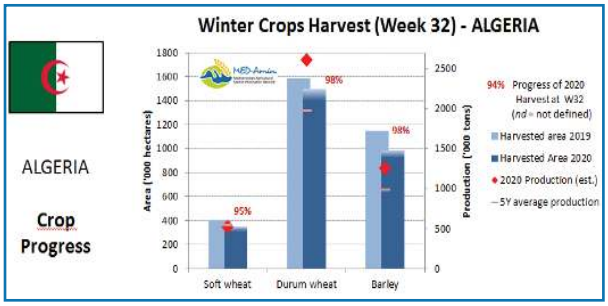
Algeria

This winter grain harvest is characterized by a decrease in the harvested areas compared to the previous year, by 8 %, 5% and 14% for soft wheat, durum wheat and barley respectively. It is mainly due to the size of the areas affected by the rainfall deficit recorded during the months of January and February 2020 whereas the planted areas were similar to 2019. Damaged area is estimated to 25% for barley, 12% for soft wheat. Harvest was in advance compared to average, in particular for soft wheat (one week) mainly due to the mobilization of harvesting equipment and the climatic conditions in June which accelerated the maturity of the grains (see the graph beside). It is now over since

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

mid-August. Thanks to average yields in line to the 5Y averages, the 2020 production is estimated by the authorities at 0.52 Mt, 2.6 Mt and 1.25 Mt for soft wheat, durum and barley respectively. Following the "good" 2018-2019 campaign, the USDA forecasts wheat imports slightly up around 7 Mt during this NMY.



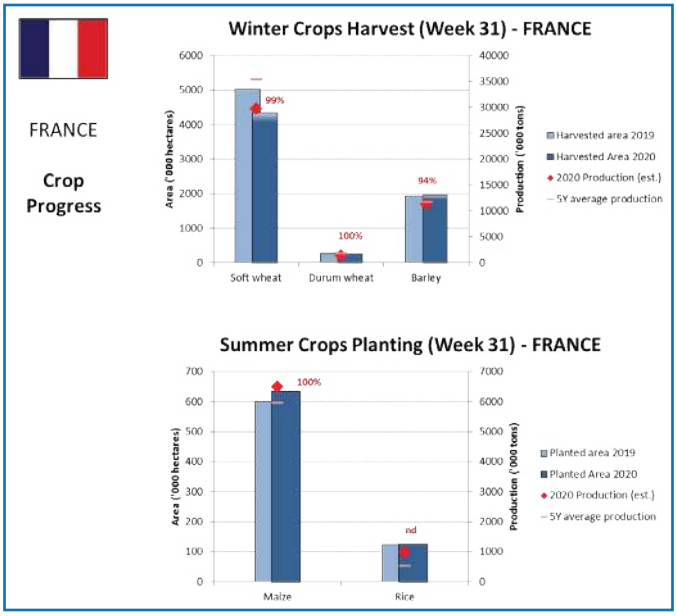


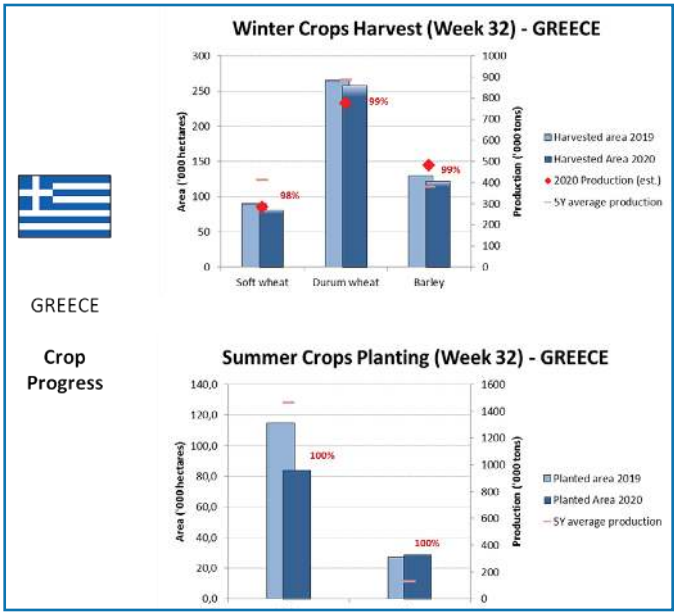
Egypt

At mid-July, the wheat reserves are estimated at a five to six months domestic consumption according to the Supply Minister. This year, the country collected 3.6 Mt from local farmers to build up stockpiles. Cereal harvest took place in June under climatic conditions characterised by a heatwave in mid-May. Estimated yield values for wheat and barley are just above the 5-year average. The IGC forecasts a wheat domestic production slightly up y/y at 8.9 Mt and imports at 12.8 Mt, an historical level for the world's largest wheat importer (13 Mt by USDA). The IGC forecasts also a barley production of 0.2 Mt and an equivalent figure for imports. Concerning summer crops, maize outputs raises a bit at 6.4 Mt, as well as imports toping at 11 Mt (USDA). Rice crop is set at 4.3 Mt and a minimal import level this year at 0.2 Mt (USDA).

France

The particularly abundant and frequent rainfall in the fall of 2019 made sowing soft wheat very complicated if not impossible. Many areas have been sown with spring crops instead. The soft wheat harvest ended in mid-August with an advance of around 1 week compared to last year (see the graph after for more details) due to the climatic conditions recorded since the spring (good sunshine and high temperatures), on surfaces of 4.4 million hectares, in decline of 13% compared to the average of the last 5 years and last year. Yields would average 6.8 t/ha i.e. -4% compared to the five-year average. Note this year the very strong heterogeneity of yields (from simple to triple), depending on the region, varieties precocity and soil depth. National production would reach 29.7 Mt, with an overall good quality (good protein content and high specific weight). The durum wheat harvest was completed on August 3 on more than 246,000 hectares. The yields are also very heterogeneous. Despite a slight increase in surfaces in 2020 (+ 2% compared to 2019), stemming from a downward trend, surfaces remain significantly lower than the 2015-2019 average (- 25%). Thus, production, announced at 1.3 Mt, would be down 28% compared to the 2015-2019 average. On a total of 1.97 million hectares, harvests ended around July 22 for winter barley and August 10 for spring barley. Production is thus estimated at 11.3 Mt (-22% winter barley and + 37% spring barley vs. five-year average). Spring barley has often been affected by dwarf yellowing this year. The protein levels are between 10.5 and 11.5% and should satisfy brewing users in most cases, as well as with calibrations. With good growing conditions until the beginning of July, sowing (on more than 1,507 thousand hectares, + 8% vs 2019) and the emergence of corn went well in France. The following stages of development, including flowering, even recorded a significant advance compared to the usual averages. However, the severe drought that the country has been experiencing since early July has disrupted the smooth running of the corn cycle and impacted optimistic yields. The growing conditions are deteriorating. At this still early stage, the estimate of yields is 9.1 t/ha and production of 14.4 Mt. As for rice, the planted area also increased to 14.3 thousand hectares, i.e. + 3.5% vs 2019 with a production at 87 thousand tons.





Greece

The country has weather conditions generally favorable for both winter and summer crops. Winter crops harvest finalized by end of July. Above-average rainfall, with the exception of Eastern Macedonia and Thrace (North-East) where rainfall was scarce, benefitted to summer crops with a positive outlook. Yield forecasts are above the 5-year average for the main crops, for instance 10.8 t/ha for maize, i.e. +5% vs 5Y average (MARS Bulletin). According to the Ministry of agriculture, 2020 outputs are reduced compared to averages because the good yields could not offset the significantly reduced areas (except for barley, see above the graphs): 284 kt of soft wheat, 775 kt of durum, 483 kt of barley, (and 1273 kt of maize for DG AGRI).

Italy

The cereals profile is relatively similar to the last three years in terms of production. The winter crops conditions were generally favourable. Harvests ended for durum and barley, almost for soft wheat. According to DG AGRI, the 2020 production is stable, estimated at 2.7 Mt of soft wheat, 3.8 Mt of durum, 1.0 Mt of barley despite below average yields. A beneficial surplus of precipitation occurred in eastern Italy while the country experienced three heatwaves since 20 July, with maximum temperatures exceeding 35°C around 31 July. In north-western regions, crop development results are uneven due to the different sowing strategies adopted by the farmers, but most fields have above-average biomass accumulation. In August, the grain filling of grain maize began under optimal conditions. In north-eastern regions, maize only entered the grain filling phase in the second week of August, with up to 20 days of delay due to the unfavourable start to the season. Summer crops including rice profited from the abundant precipitation, and recovered from the unfavourable dry start to the season. The DG AGRI estimates maize production at 6.5 Mt, with 10.6 t/ha of average yield (MARS Bulletin).

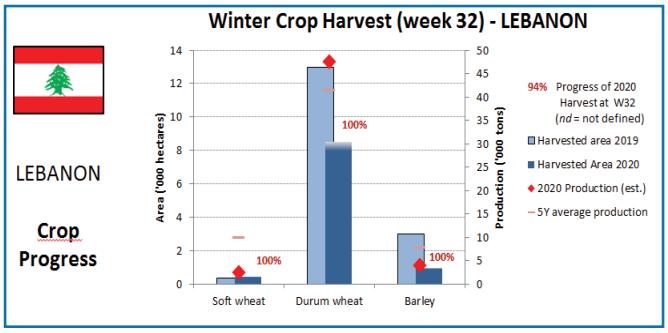
Lebanon

A new agricultural strategy encouraged farmers to cultivate soft wheat, with consequences on the increase of this year harvested area of 33%. Winter crop conditions were favourable. The harvest ended at the end of July (see the graph beside), with estimated domestic production at 2,500 tons. Specialists indicate a good quality of grains, with no relevant fungal infestation. The area cultivated for durum wheat decreased by 33% vs 2019 to cultivate soft wheat instead. Thanks to average yields around 5.5 t/ha, the harvest is estimated at 47,500 tons. Concerning barley, a reduction by 66% of the harvested area to a low 1,000 ha is mainly due to the economical situation in Lebanon where no support was performed for barley seed unlike wheat. Neither maize nor rice is cultivated in Lebanon.

Morocco

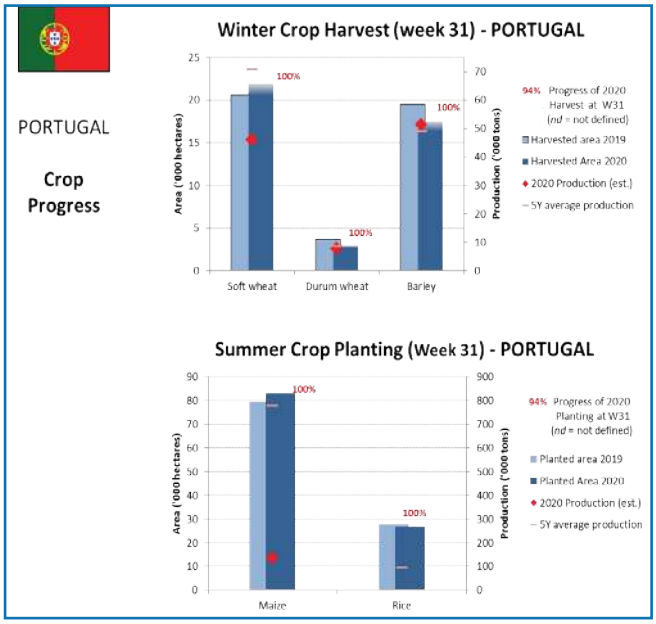
The Kingdom has been the country most affected by drought during this campaign in the Mediterranean region. The current campaign resulted worse than the previous one, also unfavourable due to drought. A reduced production

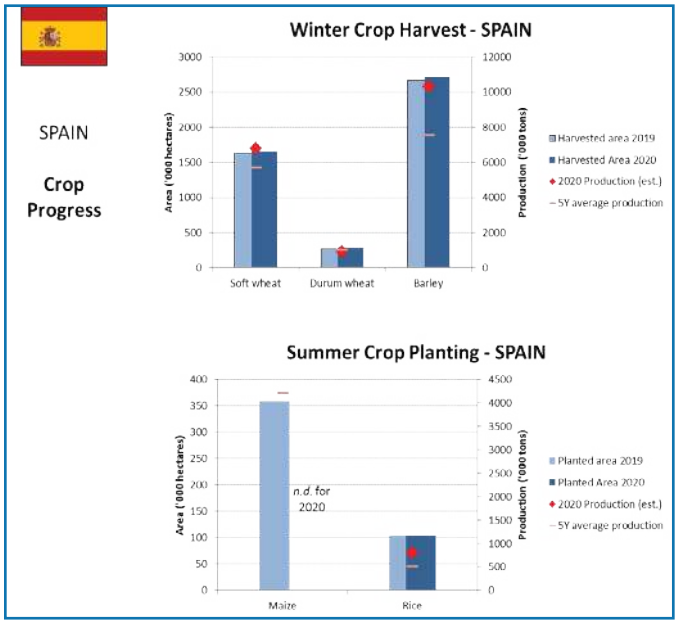
tightens supplies. The winter crop season was significantly unfavorable with important quantity of damaged crops, around 50%, even more for barley. Rainfall in the April-May period arrived too late to recover crops. Yields dropped by 23% and 30% vs 5y average for wheat and barley respectively (MARS Bulletin for North Africa as of 15 June). According to the Department of Studies and Financial Forecasts (DEPF), this situation resulted in cereal production estimated at 3 million tons, down 42% compared to the previous season and 62.3% compared to the average for last five years. In its conjuncture report for the month of July (N ° 281), the DEPF had specified a forecast of 1.65 Mt of soft wheat, 0.75 Mt of durum wheat and 0.58 Mt of barley. A strong pace of imports to date and expectations for a continuation of brisk sales to the country underpin a revision upward in the import forecast, now raised to 6.2 Mt.



Portugal

During this campaign, winter crops benefitted from favourable conditions with average water supply. The harvest of spring cereals was completed during the review period (see the graphs below). Yields are generally slightly above the 5-year average (MARS Bulletin of August) but reduced acreage and harvested areas (until -15% on 5-y average for the harvested area of durum) triggered to low production: 46.1 thousand tons of soft wheat (-22% y/5y avg), 7.8 kt of durum and 51.5 kt of barley. Grain quality is good. About summer crops (maize and rice), yield expectations in Portugal's *Centro* and *Norte* are stable at around the 5-year average. The rice planted area in 2020 (26,650 hectares) decreased by 10% vs 2019 due to works on *Sado* Valey irrigation system (i.e. -3,000 ha). The Ministry of agriculture estimates rice average yield in 2020 at 5,1t/ha, 13% below the average yield of the last 5 years. Maize planted area remains stable (above 83 thousand hectares), due to maize price stability in the world market, with a 2020 output estimated at 726 kt (DG AGRI).





Spain

The country benefitted from good weather conditions for both winter and summer crops. Consequently, the increase in winter cereal crop yields is estimated to have led to a good production figure, despite the decline in area. Domestic autumn-winter cereal production (wheat, barley, oats, rye and triticale) in the current 2020/21 marketing year is expected to reach a record level above 22 Mt, according to the latest estimates in August. Harvest of the three

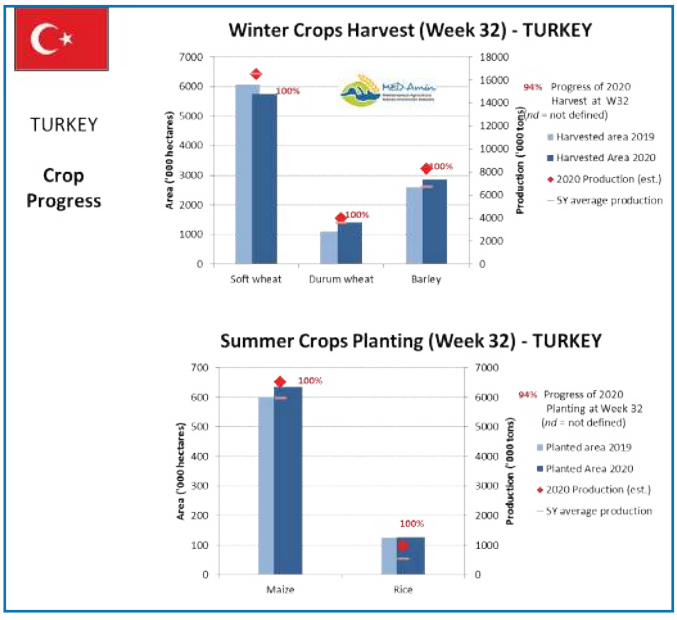
monitored winter crops has ended the first week of August (see the graphs before). Common wheat crop occupies 1.64 Mha with a forecast production of 6.8 million tons, +33% vs last year and +22% vs 5-y average. Durum wheat has an area of 281,212 hectares and a forecast production of 923,038 tons, +26% vs last year but -8% vs 5-y average. Barley is the most widely planted cereal, with approximately 2.4 million hectares and an estimated production of 10.3 million tons, which is almost +40% vs last year and +35% vs 5-y average. Following the late planting because of rains, rice crop is well developed on more than 103 thousand hectares, under favorable weather conditions. The increase of water supply for rice irrigation permitted planting 100 % of *Andalucía* region area (southern Spain). Very hot weather in *Extremadura* calls to pay attention during the next months and the grain development phase. First estimates indicate a rice production of 0.8 Mt (Ministry of Agriculture). For maize, DG AGRI forecasts a production of 4.1 Mt, +2% vs 5-y average.

Tunisia

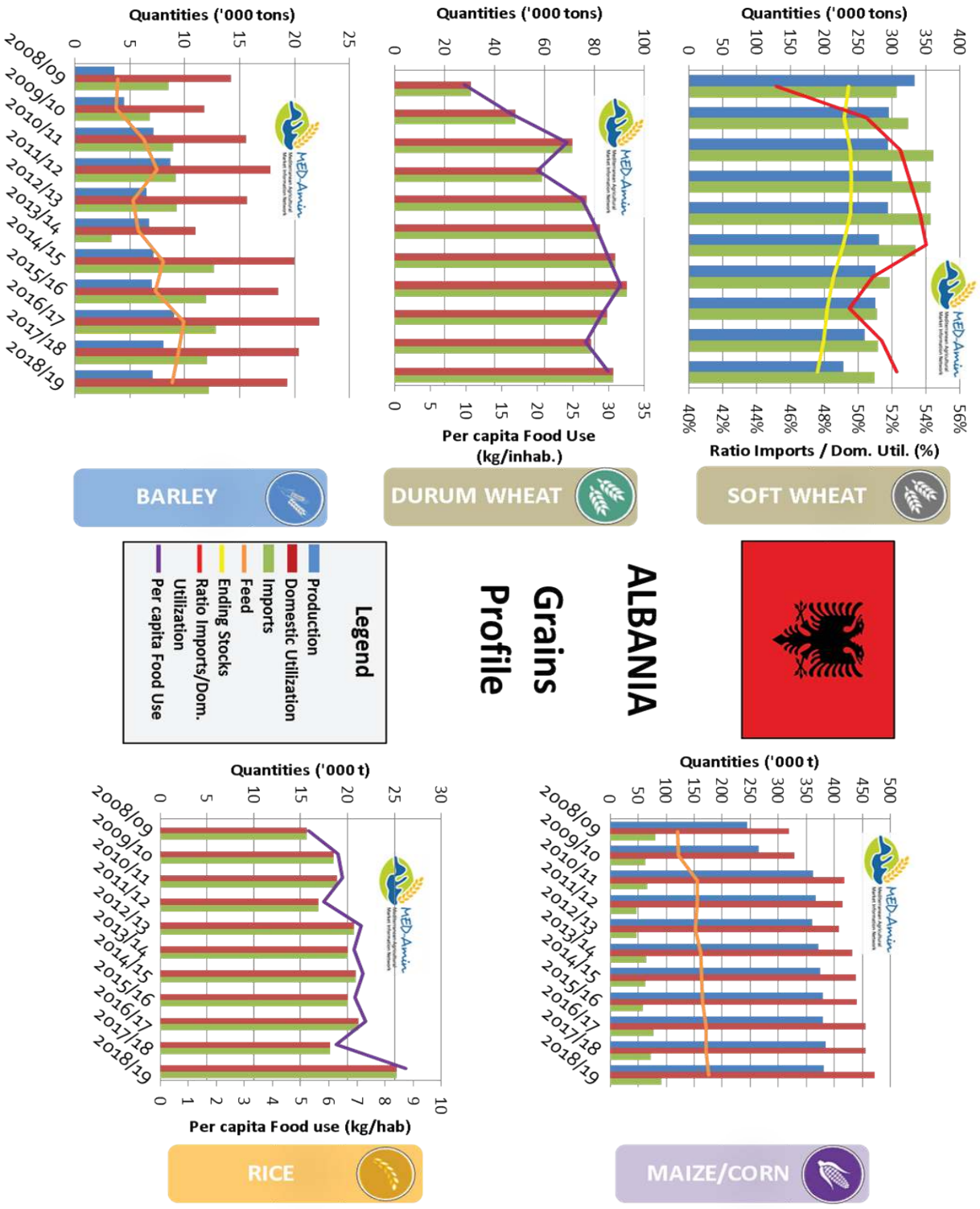
The winter crop conditions have been mixed during this campaign. Spring rains benefitted to soft wheat and durum crops, whereas it was too late for barley crops which were more advanced in development. This resulted in average to positive output for wheat (yields around 1.3-1.9 t/ha), below-average output for barley (approx. 0.8 t/ha) which is mainly grown in central regions more affected by adverse periods (MED-Amin Production Forecast, MARS Bulletin of June). Planted areas were reduced by 20% compared to the previous campaign, with acreage around 556,000 hectares of wheat and 518,000 hectares of barley. The harvest has been completed in July. The Ministry of Agriculture estimated wheat production values between 6.5 and 7 million quintals, following the "historic" level collected in 2019 (around 13 M quintals). For the 2020/21 marketing year (July / June), cereal import requirements are expected to rise around 3.8 million tons, around 20% more than imports from the previous marketing year and 5% more than the five-year average.

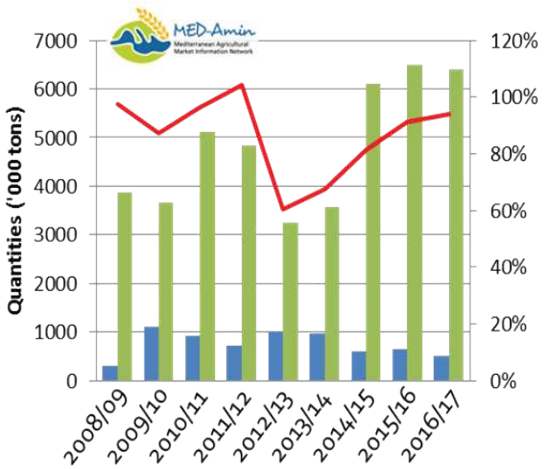
Turkey

Winter crop developed under generally favourable favourable conditions throughout the campaign. Higher-than-usual temperatures have been recorded since the beginning of July, with 30 - 40 days of maximum temperatures above 35°C in western and southern Turkey but did not affected crops. The last winter crop (wheat, barley) harvest operations took place in eastern Anatolia around 15 July. Collected areas were similar to the last year ones, except for the durum wheat area which bumped by 28% at 1.4 million hectares (see the graphs below). Grain quality is good. Thanks to average yields around 2.8-2.9 t/ha, the 2020 output is estimated at 16.5 Mt of soft wheat, 4.0 Mt of durum and 8.26 Mt of barley. About summer crops, plants (under irrigation regime only) are developing favourably in most regions. Crop development is still generally delayed due to the late sowings, but biomass accumulation is now above-average. Plantings of maize ended in June on 635,000 hectares according to the Turkish authorities, stable vs y/y, with an expected historical production of 6.5 Mt. Harvesting is beginning in the Middle Eastern part of Turkey (about 10% of production), while elsewhere it is mostly in October. Rice has been planted on stable acreage of 127,000 hectares and production expected to jump close to 1 Mt (0.6 Mt for AMIS and IGC).



Annex

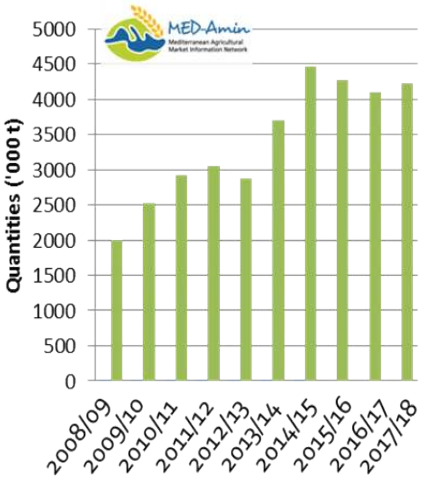

ALBANIA
Grains Profile
Legend
Production
Domestic Utilization
Imports
Feed
Ending Stocks
Ratio Imports/Dom.
Utilization
Per capita Food Use
Quantities ('000 tons)
Ratio Imports / Dom. Util. (%)
SOFT WHEAT
Quantities ('000 tons)
Per capita Food Use (kg/inhab.)
DURUM WHEAT
Quantities ('000 tons)
BARLEY
Quantities ('000 t)
MAIZE/CORN
Quantities ('000 t)
Per capita Food use (kg/hab)
RICE
2008/09
2009/10
2010/11
2011/12
2012/13
2013/14
2014/15
2015/16
2016/17
2017/18
2018/19



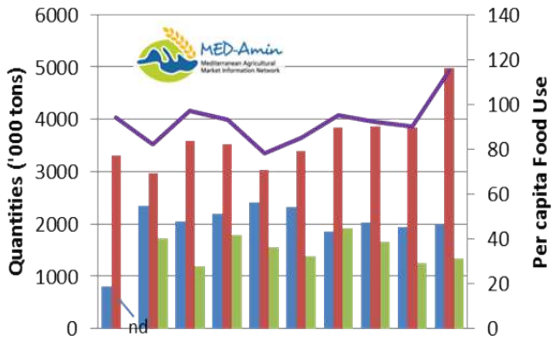
SOFT WHEAT

ALGERIA

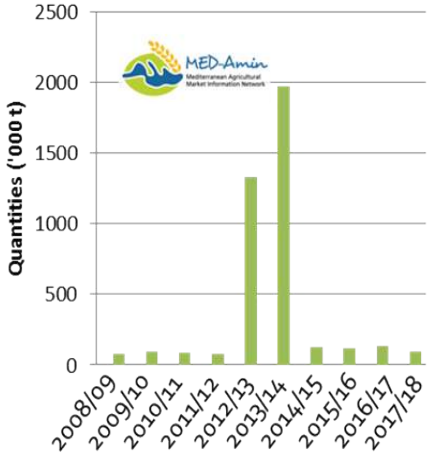
Grains Profile



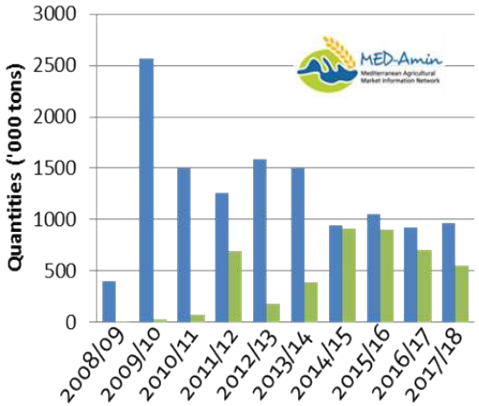
MAIZE/CORN



DURUM WHEAT



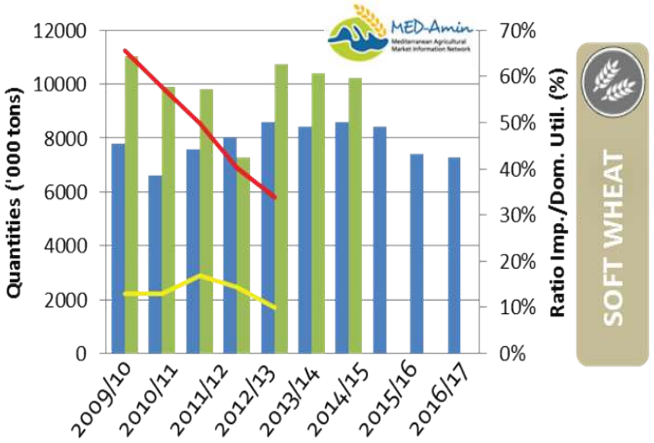
RICE



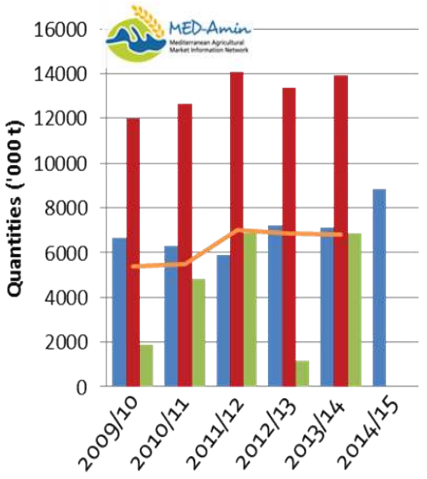
BARLEY

EGYPT

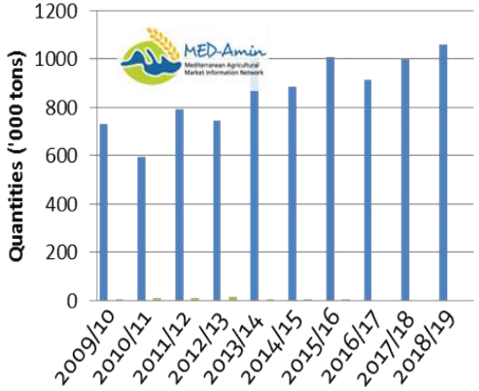
Grains Profile



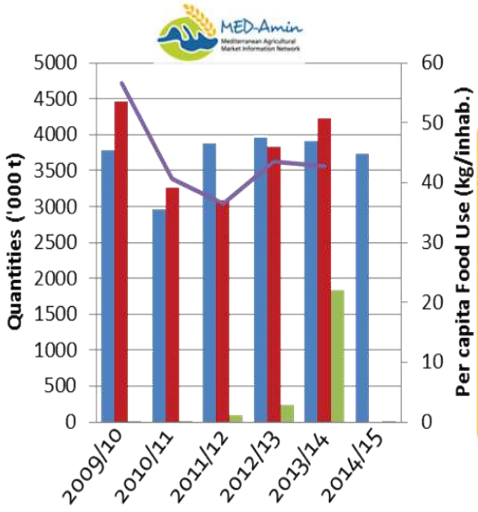
SOFT WHEAT



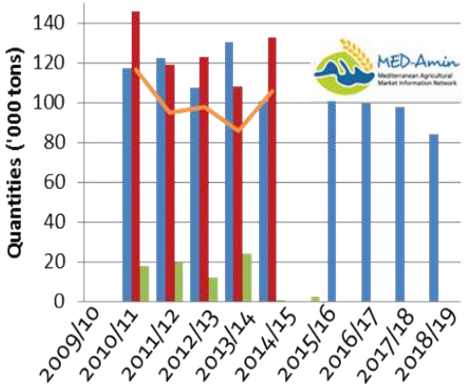
MAIZE/CORN



DURUM WHEAT



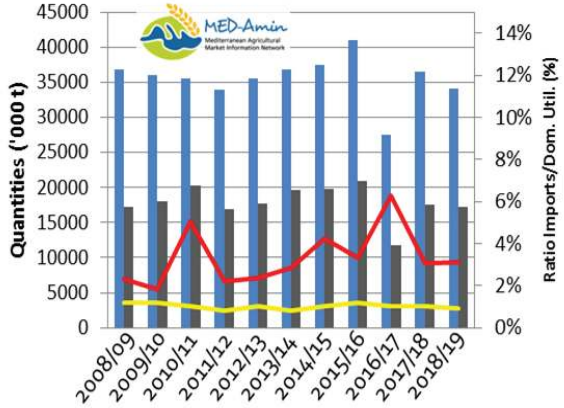
RICE



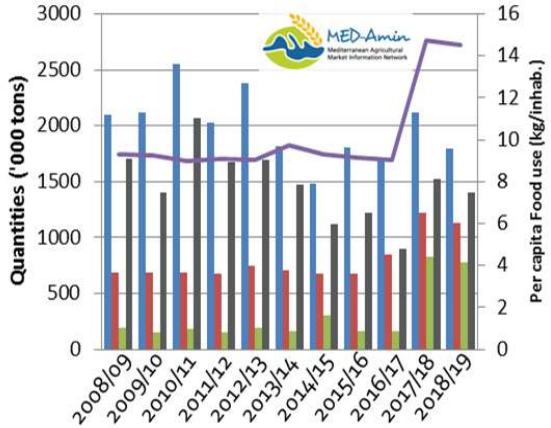
BARLEY

Legend

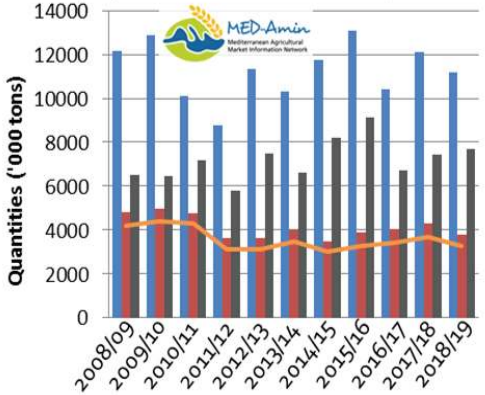
- Production
- Domestic Utilization
- Imports
- Feed
- Ending Stocks
- Ratio Imports/Dom. Utilization
- Per capita Food Use



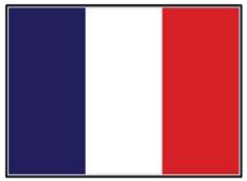
SOFT WHEAT



DURUM WHEAT



BARLEY

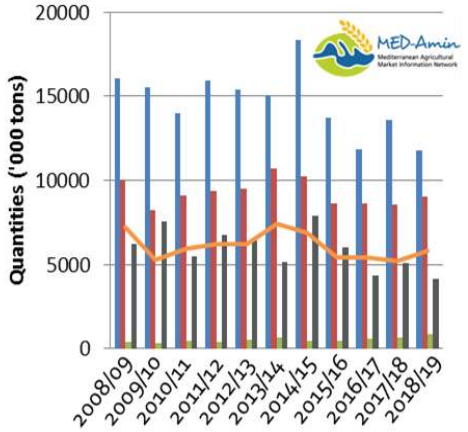


FRANCE

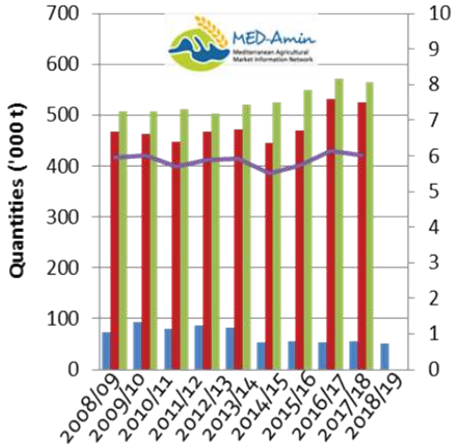
Grains Profile

Legend

- Production
- Domestic Utilization
- Imports
- Exports
- Feed
- Ending Stocks
- Ratio Imports/Dom. Utilization
- Per capita Food Use



MAIZE/CORN



RICE

GREECE
Grains Profile
Legend
Production
Domestic Utilization
Imports
Feed
Ending Stocks
Ratio Imports/Dom. Utilization
Per capita Food Use
SOFT WHEAT
DURUM WHEAT
BARLEY
MAIZE/CORN
RICE
Quantities ('000 t)
Quantities ('000 tons)
Ratio Imports/Dom. Util. (%)
Per cap. Food Use (kg/inhab.)
Per capita Food Use (kg/inhab.)
2008/09
2009/10
2010/11
2011/12
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2013/14
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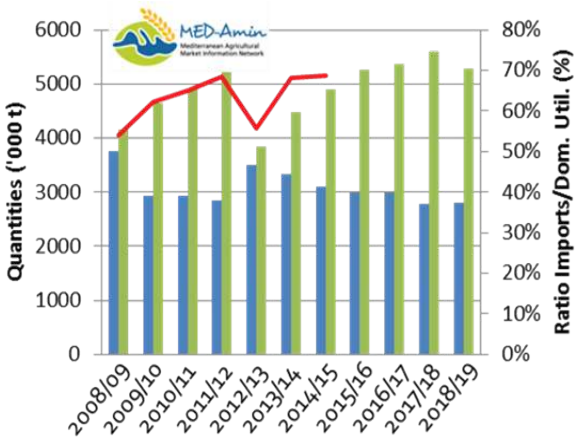
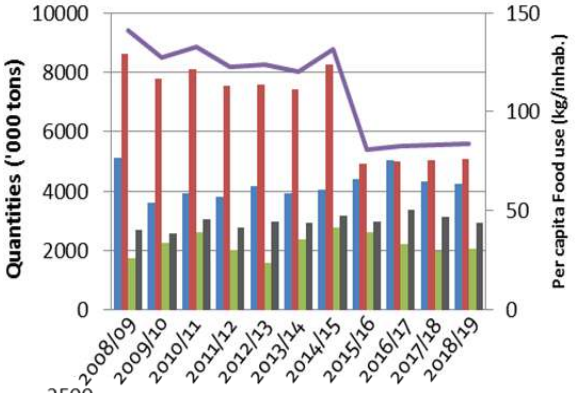
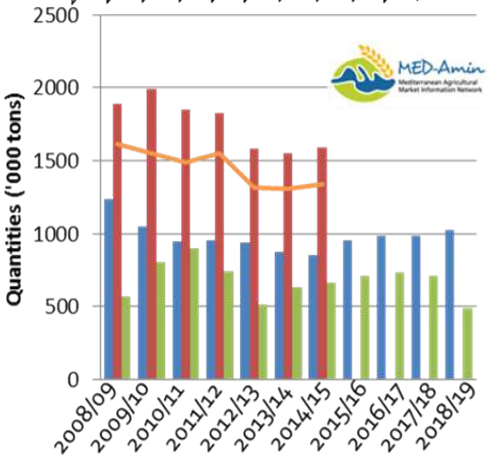
2018/19



SOFT WHEAT



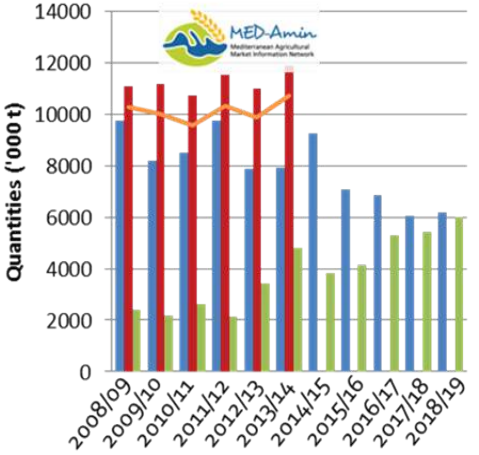
DURUM WHEAT



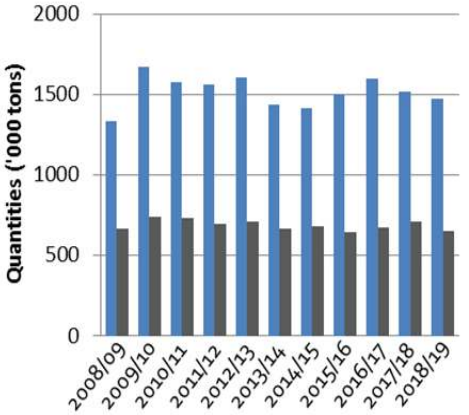
BARLEY

ITALY

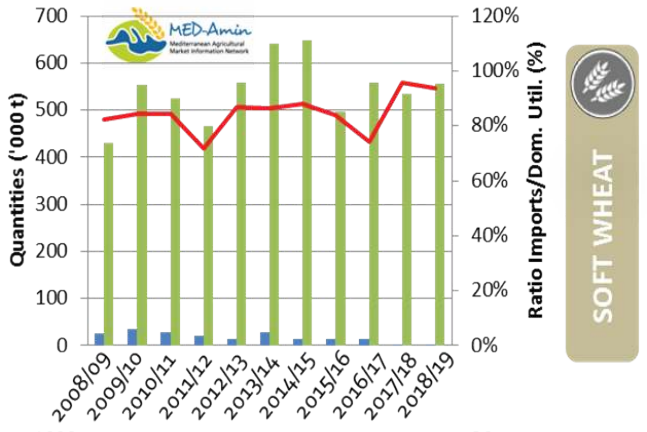
Grains Profile



MAIZE/CORN



RICE



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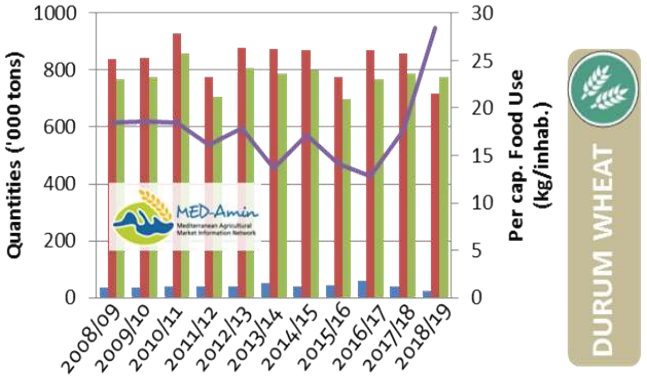
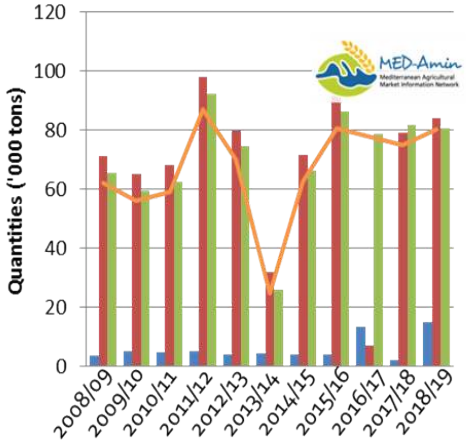


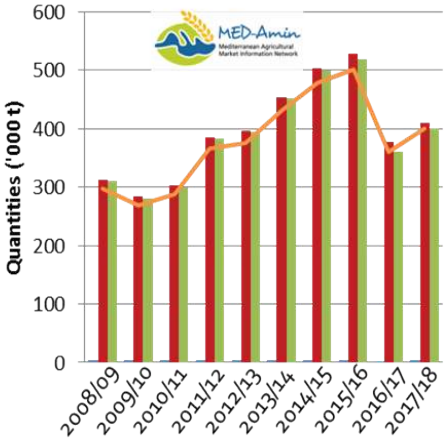
DURUM WHEAT



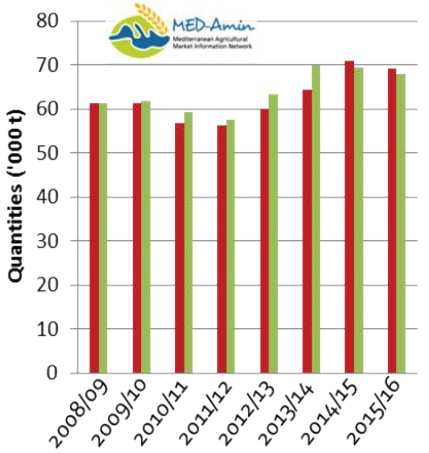
BARLEY

LEBANON

Grains Profile



MAIZE/CORN



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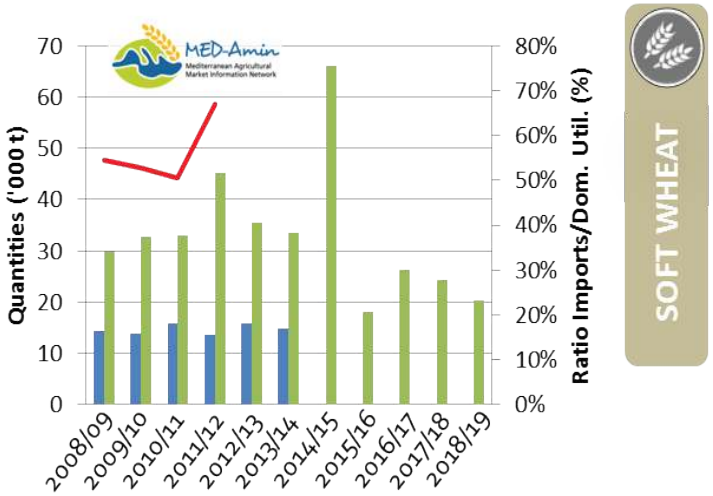
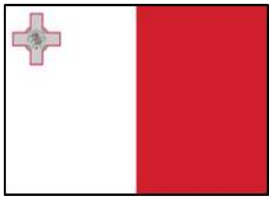
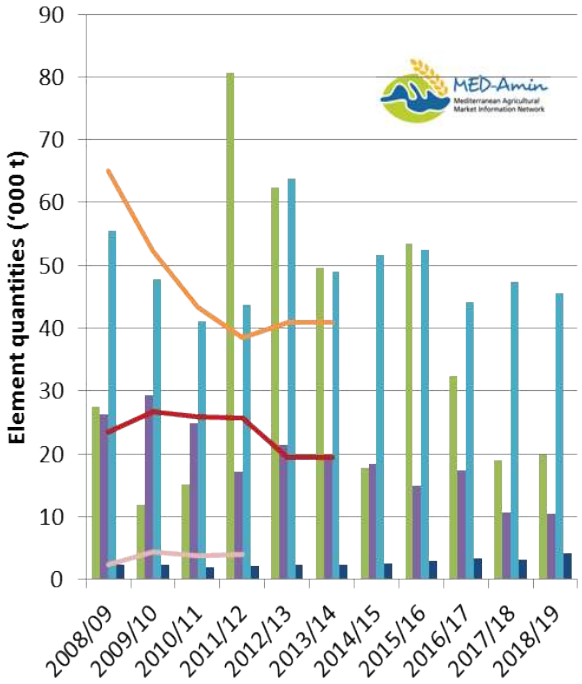


SOFT WHEAT

Legend

- Production
- Domestic Utilization
- Imports
- Ratio Imports/Dom. Utilization





DURUM WHEAT

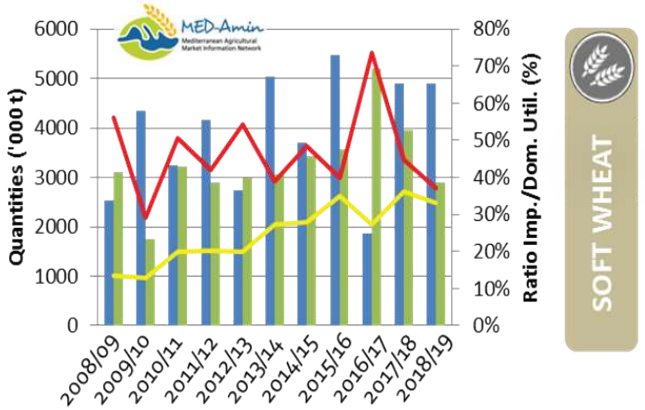
BARLEY

MAIZE/CORN

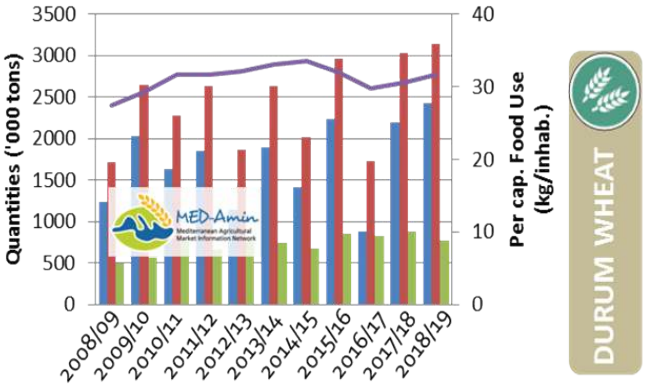
RICE

MALTA

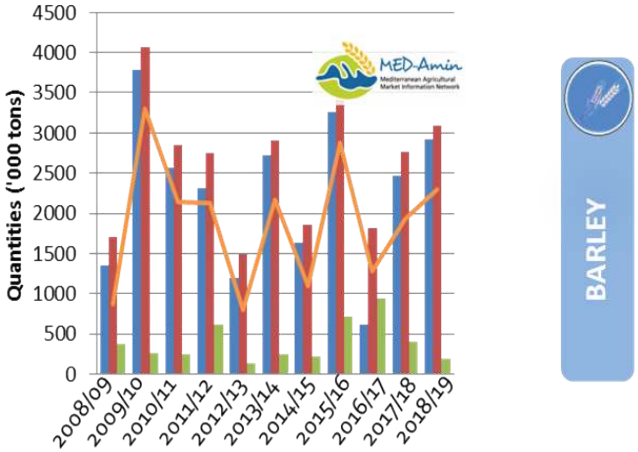
Grains Profile



SOFT WHEAT



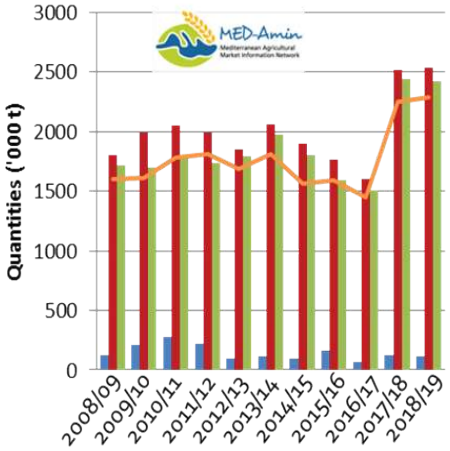
DURUM WHEAT



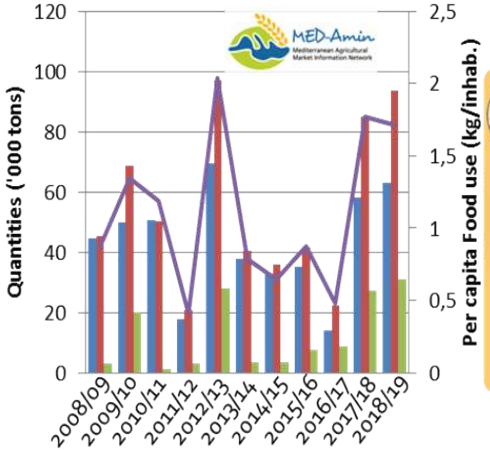
BARLEY

MOROCCO

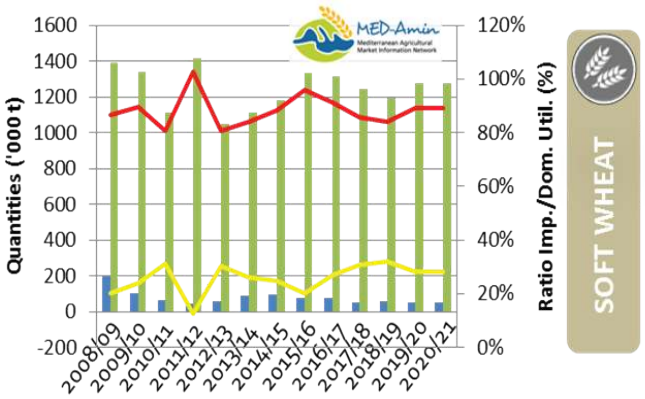
Grains Profile

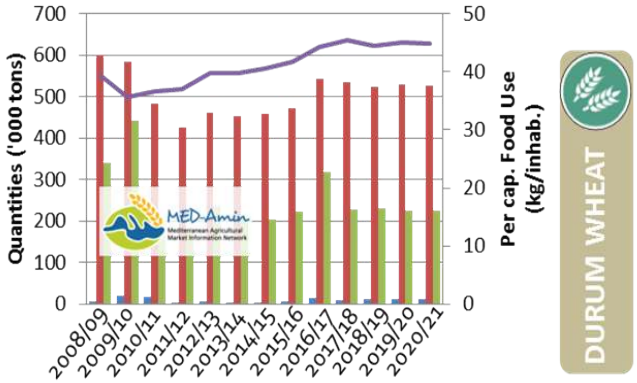


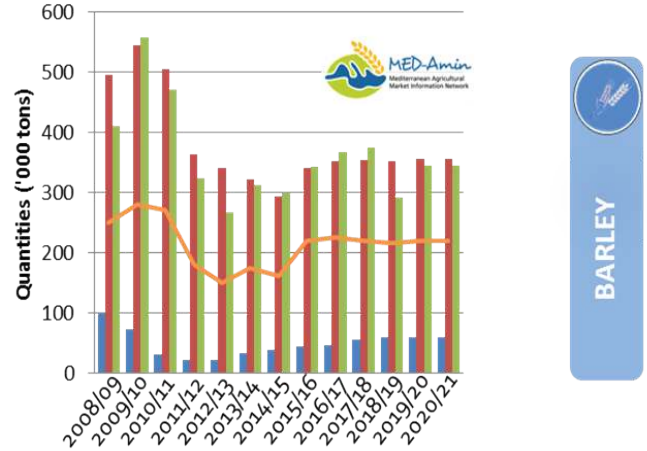
MAIZE/CORN



RICE

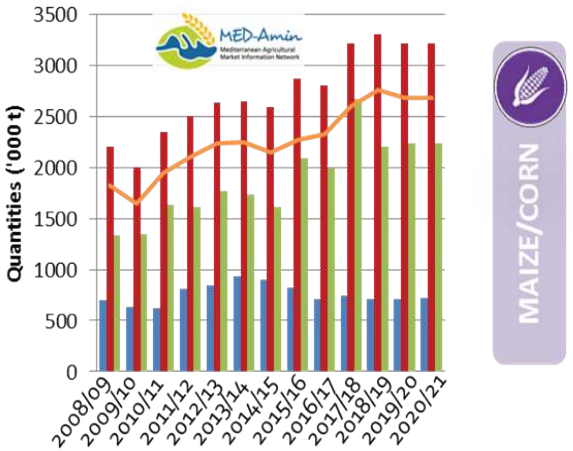


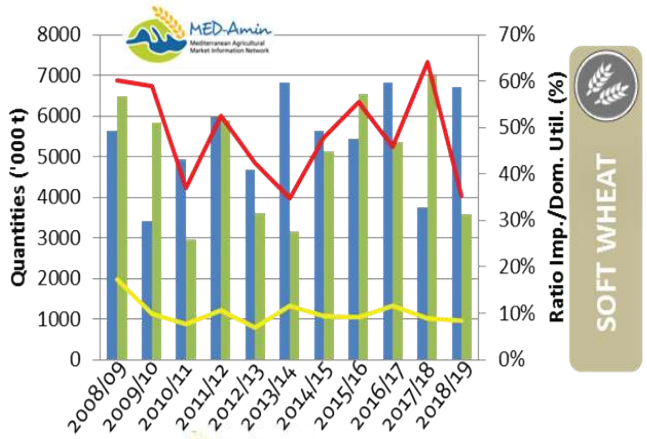




PORTUGAL

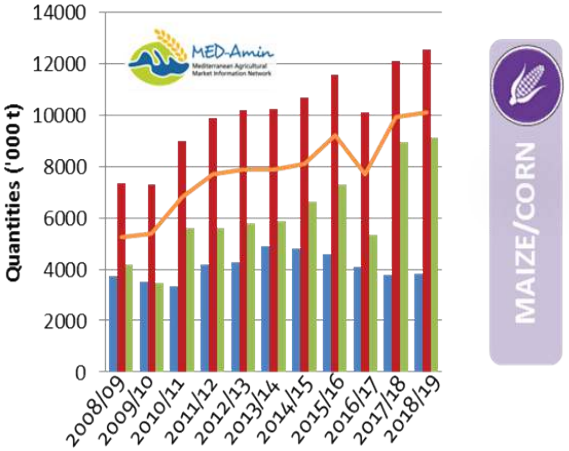
Grains Profile

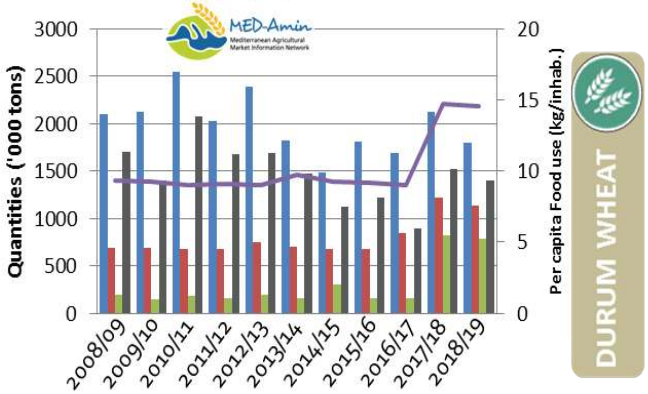


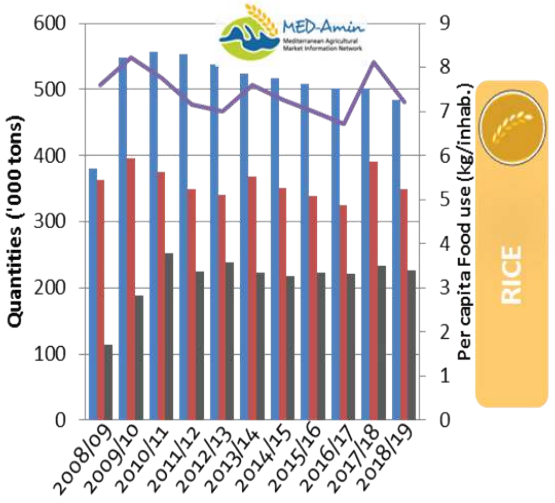


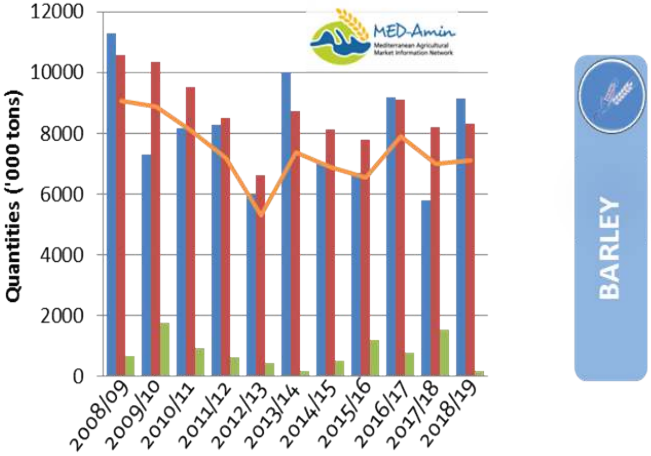
SPAIN

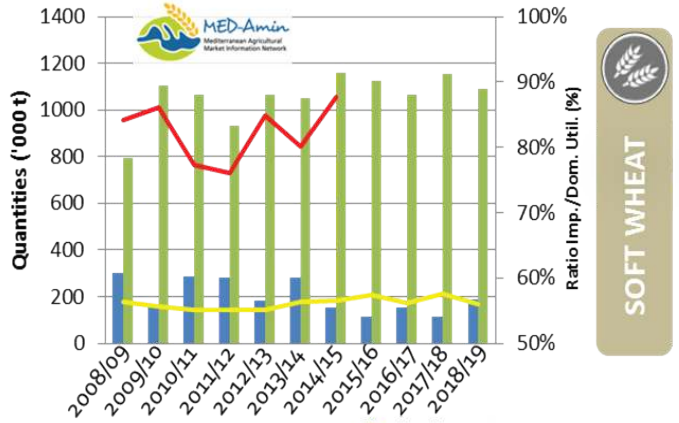
Grains Profile



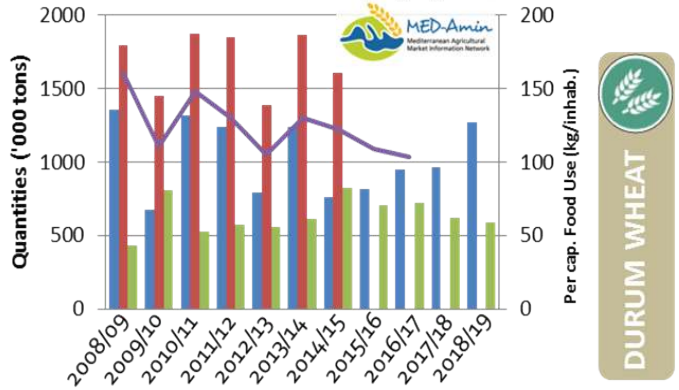




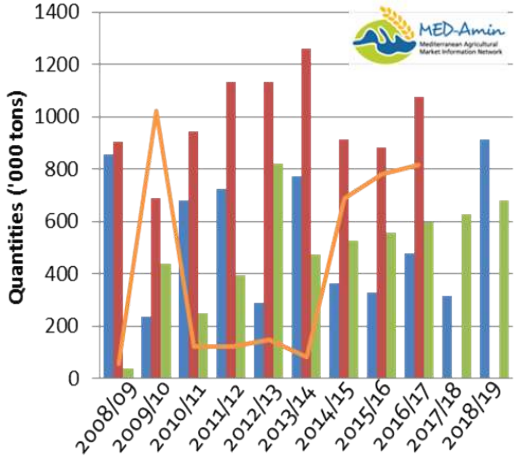




SOFT WHEAT



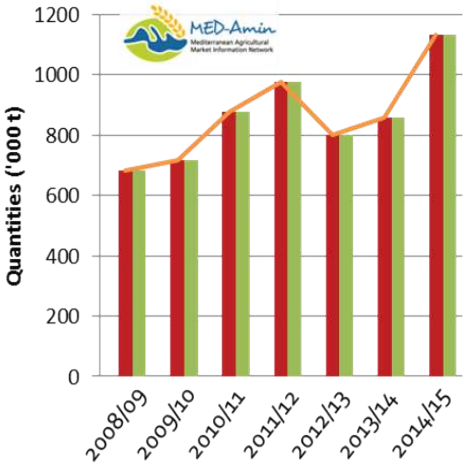
DURUM WHEAT



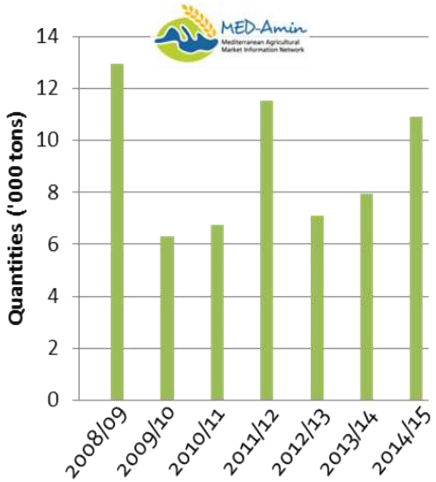
BARLEY

TUNISIA

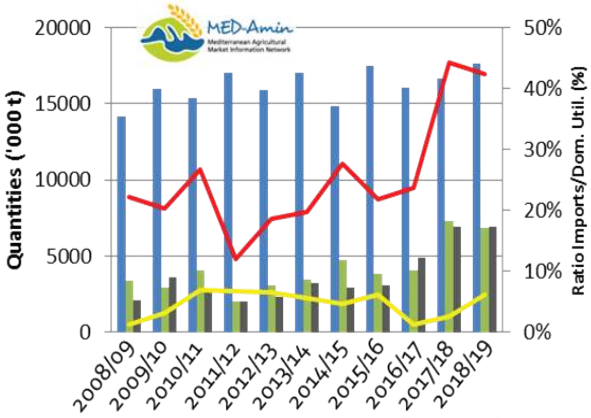
Grains Profile



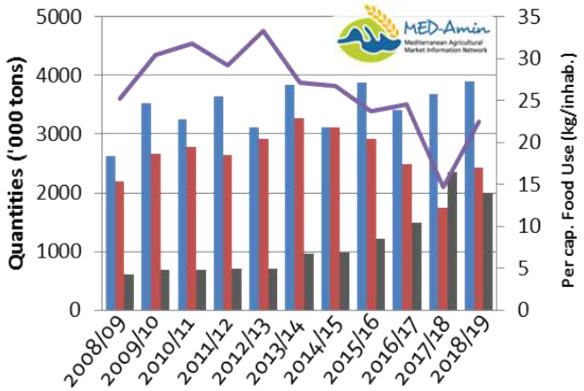
MAIZE/CORN



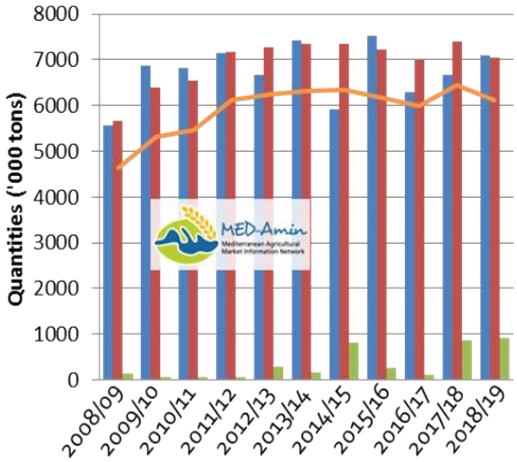
RICE



SOFT WHEAT



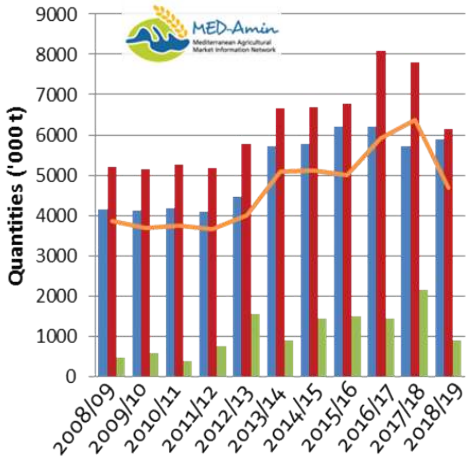
DURUM WHEAT



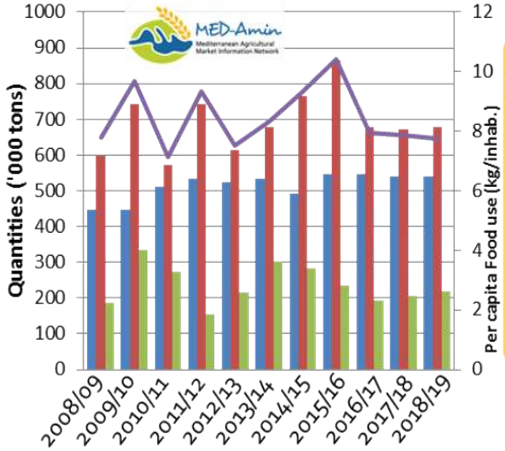
BARLEY

TURKEY

Grains Profile



MAIZE/CORN



RICE

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