CIHEAM
International Center for Advanced
Mediterranean Agronomic Studies

MED-Amin
Harvest & Planting Progress

November-December 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 November at https://www.igc.int/en/markets/marketinfo-sd.aspx, the Grain Market Reports as of 26 November), the USDA (WASDE report of 10 December, the Crop Progress report of 9 November), FAO-AMIS (Market Monitor of December (data as of 2 December) and https://app.amis-outlook.org/#/market-database/view-and-compare), the European Commission - DG AGRI (JRC MARS Bulletins of 23 November and https://agridata.ec.europa.eu/extensions/DashboardCereals/CerealsProduction.html updated on 26 November).

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 Global Market & Trade of 12 December 2020, here are the major updates since last month evaluation and highlights:

- The 2020/21 global wheat outlook is for larger supplies, increased consumption, higher exports, and reduced stocks. Supplies are raised to 1,074.3 Mt on higher global production, which is now a new record at 773.7 Mt. Global production is up this month with larger crops for Australia, Russia, and Canada more than offsetting production cuts in the European Union and Brazil.
- Global consumption is boosted on higher feed consumption in Australia, China, and the European Union. Global trade is also up, driven by higher Australia, Canada, Russia, and United States exports; China and Pakistan imports are raised for the fourth consecutive month.
- Despite record 2020/21 supplies in China, domestic spot prices in the world's largest consuming country were more than 10 % higher this November compared with the previous year and the highest in 5 years. Strong domestic prices for corn and wheat led to the largest forecast of wheat imports in 25 years; FOB prices for major exporters were more than $100/ton less than domestic spot prices for either corn or wheat in November.
- World 2020/21 consumption is increased to 757.8 Mt, mostly on higher feed and residual use for China, Australia, and the EU. China is raised 3.0 million tons to 24.0 million, which would be its highest wheat feed and residual use since 2012/13. Increased wheat feed usage is expected as China's domestic price premium of wheat over corn has narrowed significantly this year with greater supplies of old-crop wheat available through government auctions of grain stocks. Projected 2020/21 global trade is raised 2.9 million tons to 193.7 Mt on higher exports for Australia, Canada, Russia and the United States. The largest import increases this month are for China and Pakistan, each raised 500,000 tons. China's import pace continues to be significantly higher than last year and at 8.5 million tons, imports would be the largest since 1995/96. Projected 2020/21 world ending stocks are lowered 3.9 million tons to 316.5 million but remain record high with China and India holding 51 and 10 percent of the total, respectively.

Prices

Despite strong global demand, wheat prices fell slightly in most major exporting countries since last month's WASDE due to larger supply projections. Australia's production forecast was revised further upwards by ABARES following news of an improving harvest, Canada edged up its 2020 production estimate, and an expected rebound in France's 2021 wheat crop harvest all weighed on prices. Furthermore, news of Russia possibly raising its yet to be announced grain export quota for the spring contributed to dampening global prices. Argentine prices, meanwhile, continued trending upwards following further estimates of lower 2020/21 production due to drought.

Crop conditions and Harvest Progress

Conditions remain mixed in most of the major prodeucing regions, e.g. France and Eastern Europe, in Russia and in Ukraine, as well as in parts of Argentina, Brazil and China. Harvest is generally complete in the northern hemisphere. In the South, Argentina's wheat harvest is now 20% complete. BAGE expects Argentina will produce 16.8 Mt of wheat in 2020/21, down 11% on the year due to extreme dryness and frost damage.

For 2021 crops, US wheat planting is complete, as well as in France, Russia, and Canada at mid-November. Durum planting is more delayed in time than soft wheat.

Durum

Due to larger area forecast for Canada, world production is estimated at 34 Mt (+2% y/y), incl. 7.4 Mt in the EU-27 (of which 3.9 Mt in Italy) 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 23% from 2019/20 to 6.1 Mt. Canadian durum exports are expected to remain stable year-over-year at 5.3 Mt. 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

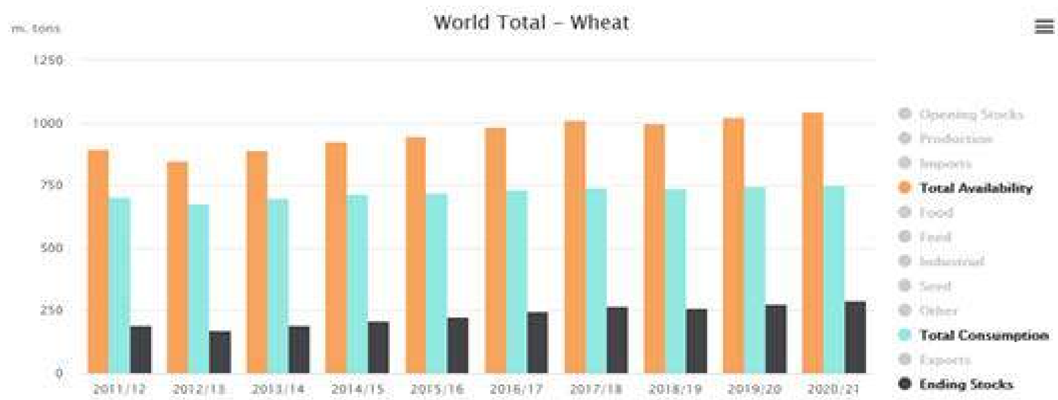
- **EU** (18-20% of world production[1]): According to the AMIS Market Monitor of November, conditions are mixed as first dry and then wet conditions have hampered sowing activities in France and Eastern Europe, however, central Europe remains under favourable conditions. The MARS bulletin of 23 November indicates in Most of Europe favourable weather conditions since mid-October allowed the sowing of winter cereals and the harvesting of summer crops to catch up. Sowing and harvesting remain behind in eastern Czechia, Slovakia, Hungary, Romania and Bulgaria. EU wheat production is estimated at 124 Mt by DG AGRI as of 26 November (i.e. -9% vs 5Y average, of which 117 Mt of Soft wheat), 136 Mt by USDA as of 12 December.

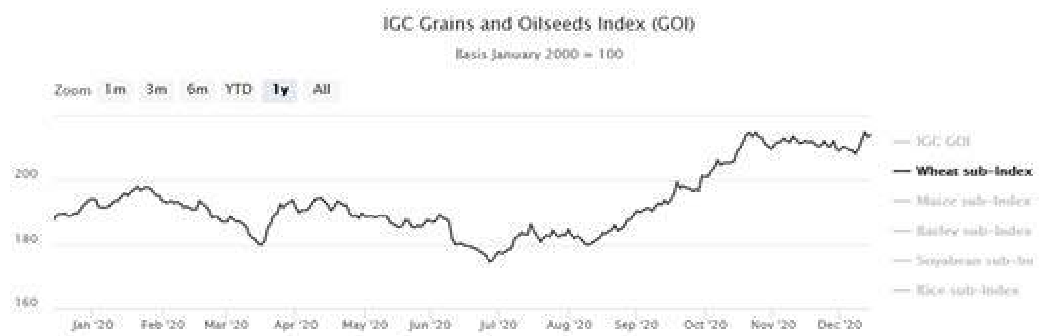
- **China** (17-18%[1]): Sowing of 2021 winter wheat is ongoing under mixed conditions with some low soil moisture affecting emergence in the east. 2020 production is estimated at 135-136 Mt (USDA, IGC), about an increase of 2 Mt vs 5Y average.

- **India** (14%): Harvest has been completed, heading toward a fourth record wheat harvest, estimated at 108 Mt, +4 % vs y/y. 2021 planting has not started yet.

- **Russia** (10%): 2020 wheat production is raised 500,000 tons to 84.0 Mt with the harvest results now complete. Russian winter grains planting for harvest in 2021 is nearly complete at a record 47.2 million acres (19.1 million hectares), up 6% from last year. Greater planted area could help offset yield challenges as farmers plant winter wheat into overly dry soil. "Despite some improvement in recent weeks, plants are still in a bad shape overall," said SovEcon, a Russian agriculture consultancy, on Nov. 16. "A lot will depend on how harsh this winter will be and how much precipitation we will see."

- **USA** (7%): Sowing of winter wheat is ongoing under mixed conditions due to expanding dryness in the central and southern Great Plains. While condition ratings are not highly predictive of final yields at the current stage, crop condition showed a large portion of winter wheat resides within regions currently experiencing prolong dry and drought conditions: 43% under good to excellent conditions (52% last year; 54% 5-year average). U.S. ending stocks are lowered 15 million bushels, to 862 million, on reduced supplies and higher export use. U.S. exports increased by 10 million bushels to 985 million, mainly on the strength of white wheat exports through the first half of the marketing year, coinciding withincreased global imports.All-wheat imports are trimmed 5 million bushels on a slower-than-expected pace ofdurum imports from Canada, down 3 million bushels, and a slight reduction of 2 millionbushels in Soft Red Winter (SRW) wheat purchases.The 2020/21 season-average farm price is unchanged from the November forecast and remains at $4.70 per bushel.





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

Maize/Corn

Market

Highlights from the AMIS Market Monitor of November (AMIS countries account for 92% of global maize production):

- 2020 production forecast to reach an all-time high (at 1,155 Mt) in spite of this month's sharp downgrading of output in the US, as well as in Ukraine.
- Utilization in 2020/21 to expand slightly faster than earlier anticipated (up to 1,169 Mt), supported by firmer feed demand, especially in China.
- Trade forecast for 2020/21 (July/June) scaled up further, projected beyond 182 Mt, reflecting even faster pace in purchases by China.
- Stocks (ending 2021) cut by 10 Mt, now 19 Mt below their opening level, with most of the m/m decrease in the US where inventories are set to fall to their lowest level since 2013/14.

Prices

Global export values rose for a sixth successive month on tightening supply and demand fundamentals. Including export price gains across all major origins, the IGC GOI sub Index increased by 5 %, to a fresh six-year peak. Amid cuts to official production and closing stock estimates, US prices strengthened, but with quotations still at a discount to competing suppliers. Sentiment was also buoyed by China's emergence as a major buyer, with growing expectations for record imports in 2020/21. Dry weather in parts of South America was generally supportive, especially in Brazil, where spot availabilities dwindled due to sustained solid domestic and overseas demand. Despite better results from the latter stages of the harvest, quotations in Ukraine climbed on slow farmer selling, tied to a much smaller exportable surplus.

Top Producers

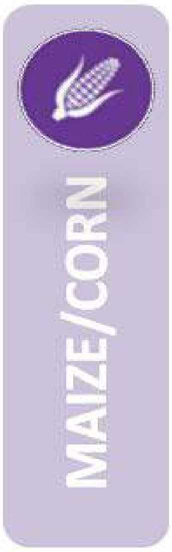
- **USA** (35% of world production[1]): Harvest is completed by 91% at Nov 8 and is over at the end of November (USDA) following a more rapid pace than last year, benefitting favourable conditions leading to above-average yields in Minnesota and Illinois. According to the USDA, production is expected to reach 368 Mt, revised downward -6Mt on m/m and not anymore an historical level (but + 24 Mt vs 2019). Planted area was similar to the two last years.
- **China** (22%[1]): Harvests ended up under favourable conditions. The total harvest is estimated at approx. 260 Mt (USDA, IGC), stable and in line with the 5Y average. Ending stocks decreased in China to 191.5 Mt (-4.5% y/y; still 65.7% of world total). Driven by strong feed demand and high domestic prices (≈USD 360 /t in Oct) Chinese imports raised by 6 Mt to 13 Mt (+71%).
- **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 105 Mt from Brazilian CONAB (November report) i.e. +2% vs 2019 (USDA forecasts 110 Mt on Dec 12, +8% y/y). After a small reduction of the full-season maize area (4.15 Mha; -2% y/y), total harvested area is estimated at 18.44 Mha (-0.5%). Average yield is assumed at 5.69 t/ha (+2.8%). Both domestic demand (71.8 Mt; +5% y/y) and exports (35.0m t; +1%) are steady from previous month.
- **EU** 27+UK (7%): Harvest is wrapping up under generally favourable conditions except for France, Bulgaria, and Romania where summer drought has reduced yields. The 2020 harvest is estimated at 60 Mt by DG Agri on Nov 26, 62 Mt by Stratégie Grains on Nov 12, 64 Mt by USDA on Dec 12. The USDA lowered its estimate m/m by 1.9 Mt mainly due to smaller crops estimated in France (-0.6 Mt to 13.8 Mt) and Romania (-0.6 Mt to 10.7 Mt).
- **Argentina** (3%): The 2020 production is estimated around 49-54 Mt (IGC, USDA), 58 Mt according to the Ministry of Agriculture of Argentina. Sowing for the early-planted crop (larger season) is complete under favourable conditions while sowing of the late-planted crop (smaller season) has begun where soil moisture

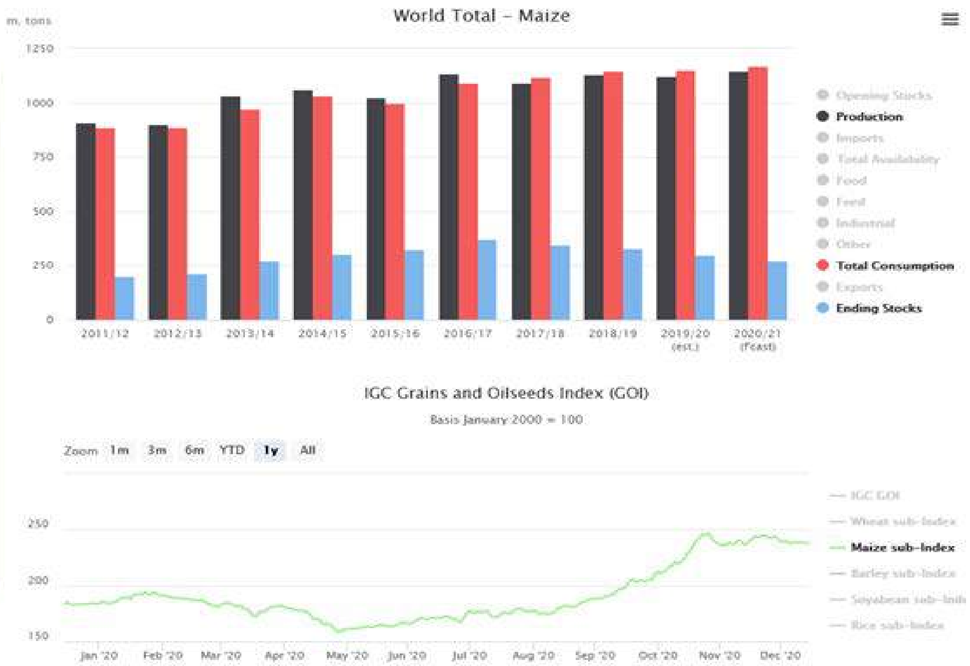
[1]: Range 2014-2020 (by USDA)

conditions permit. As of 18 November, maize planting continued at a rather slow pace reaching 31% complete of the planned area of 6.3 Mha (BAGE), similar to the area of last season which gathered a record harvest.

Crop conditions and progress of other producers

In Canada, conditions are favourable as harvest wraps up. In Mexico, harvesting of the spring-summer crop (larger season) is ongoing under favourable conditions. In Ukraine, harvesting is wrapping up under poor conditions due to the severe summer drought pushing yields below the 5 and 10-year averages. In India, the Rabi crop has stared being sowed under favourable conditions. In Brazil, conditions are generally favourable for the spring planted crop (smaller season) with some areas of dryness in the southeast and south regions affecting crops. There is an expected slight decrease in the total sown area compared to last year. In South Africa, sowing has begun under favourable conditions owing to widespread rains.





Barley

Market and Prices

The IGC anticipates another historic global harvest of 156 Mt equal as last year high. 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.

Top Producers

The European Union, Russia, Ukraine, Canada, Australia, Turkey, Argentina 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).

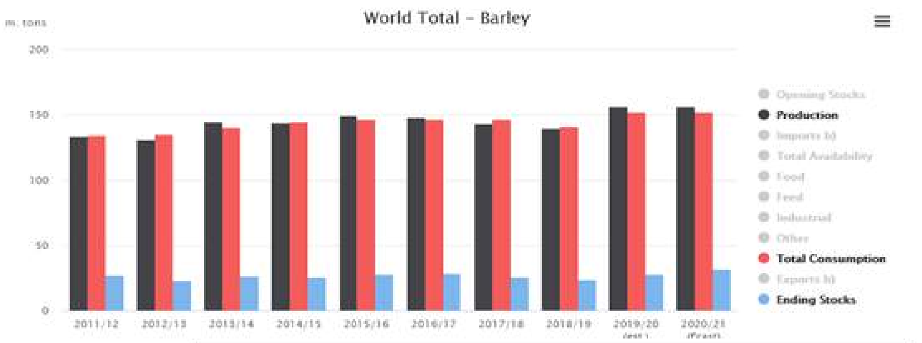
- **EU** (37-42% of world production[1]): 2020 production is estimate at 54 Mt by IGC and DG Agri (-1.5% vs 2019), over 11.3 Mha (+1% vs 2019). Exceptional outputs in Poland, Spain and Italy could not offset poor harvests in France, Romania, Bulgaria or Ireland. The sowing campaign has been – or is being - completed on time in most

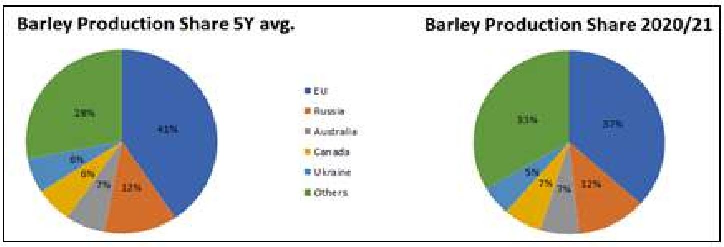
[1]: Range 2014-2020 (by USDA)

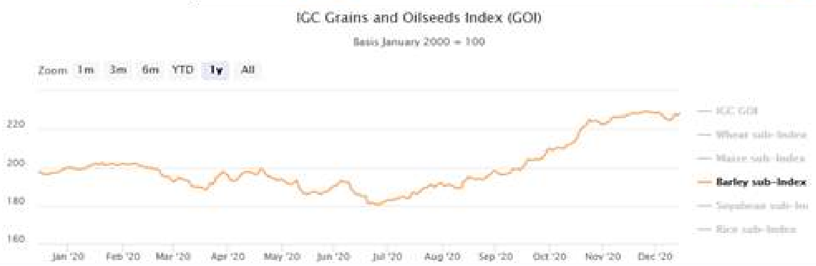
of northern, western and central Europe. Sowing can still be completed within a suitable window in many areas of Czechia, Slovakia, Hungary, Bulgaria and Romania, where abundant rain caused delays in October.

- **Russia** (10-14%[1]): 2020/21 barley harvest reached 22.2 Mt by 17 November, largely complete. For IGC, barley output will reach 20 Mt (26 Nov). 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. An export quota of 15.0 Mt will be imposed for grains (wheat, maize, barley, rye) for the period of 15 Feb to 30 Jun 2021 for destinations other than the member countries of the Eurasian Economic Union, wich could prevent extensive exports. Despite less than optimal conditions, winter crops were planted on a record area of 19.2 Mha by mid-November, including barley.
- **Australia** (5-9%[1]): Farmers have started harvesting one of their biggest ever barley crops, after drought-relieving rains convinced many to plant to the edges of their paddocks. Barley production should grow by 33 % to 12 Mt — also the second highest as for wheat after 2016/17 year (ABARES, Nov 30). Due to bumper crops, AUS barley (and wheat) will be highly competitive in many key markets despite trade conflict with China.
- **Canada** (5-8%): According to AAFC; 20 November 2020, 2020 harvest is estimated at 10.26 Mt, -1% vs last year, with an exportable potential of 3.1 Mt. Harvest conditions nationwide were significantly improved compared to 2019, with favorable weather conditions helping farmers complete harvesting early in many areas. In fact, in parts of Western Canada, most of the crops were already harvested prior to the start of survey collection on Oct. 9, Statistics Canada said. Total barley production rose 3.4% to 10.7 Mt in 2020 (biggest crop recorded since 2008). Both harvested area (up 3.0% to 6.9 million acres) and yields (up 0.4% to 71.1 bushels per acre) contributed to the increase (Statistics Canada, 3 Dec).
- **Ukraine** (5-7%): As of 23/11, cumulative 2020/21 (Jul/Jun) barley exports reached 3.7m (+0.2 Mt vs Y/Y) according to the Ministry of Economy. As of 19 Nov barley harvest was done. During July-Oct barley exports have already reached about 80% of the exportable surplus (4.2 Mt) of 2020/21 reaching 3.4 Mt, with China being the main destination (2.3 Mt). Due to unfavorable conditions barley production reached 7.98 Mt only from 8.92 Mt previous season (IGC, Refinitiv / APK). As of Nov 24, Ukrainian farms have almost completed winter grain sowing for the 2021 harvest at around 8 million hectares (98% of the forecast), of which 954.7 thousand hectares with barley (Ministry of Economy). Weather forecasters in September called the weather conditions the worst in 10 years and said only 10% to 15% of Ukraine's arable land was suitable for sowing winter crops for the 2021 harvest due to a severe drought.

BARLEY







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

Rice

Market

Highlights from the AMIS Market Monitor of November:

- Rice production in 2020 marginally lower m/m to 508 Mt, namely on reduced prospects for Bangladesh and Viet Nam, which offset an upward revision for Pakistan.
- Utilization in 2020/21 still anticipated to rise by 1.5% to 510 Mt, despite some minor revisions this month; overall a food intake expansion to an all-time record is set to drive the season's growth, while all other uses could remain close to 2019/20 levels.
- Trade in 2021 (January-December) raised slightly m/m to 48 Mt, as an upward correction to exports from India outweighs downgrades to projected shipments by China, Thailand and Viet Nam.
- Stocks (2020/21 carry-out) downscaled to 181 Mt, namely on less buoyant expectations for reserves held by India, the Philippines and Viet Nam; but stock forecasts were raised for China (around 100 Mt) and Thailand.

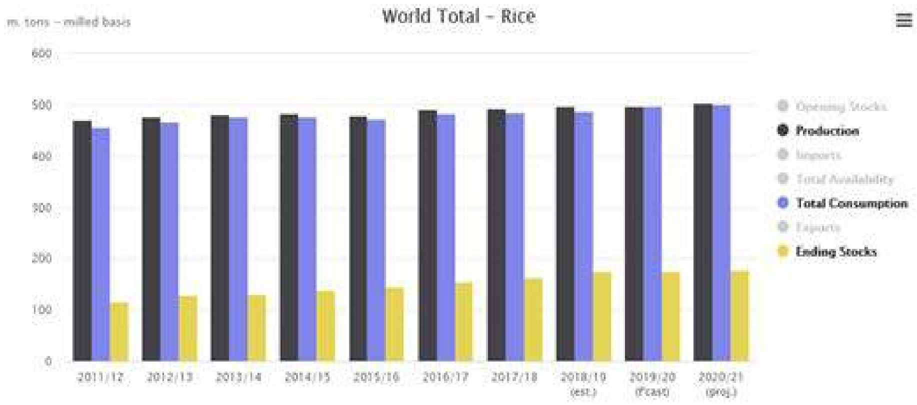
Prices

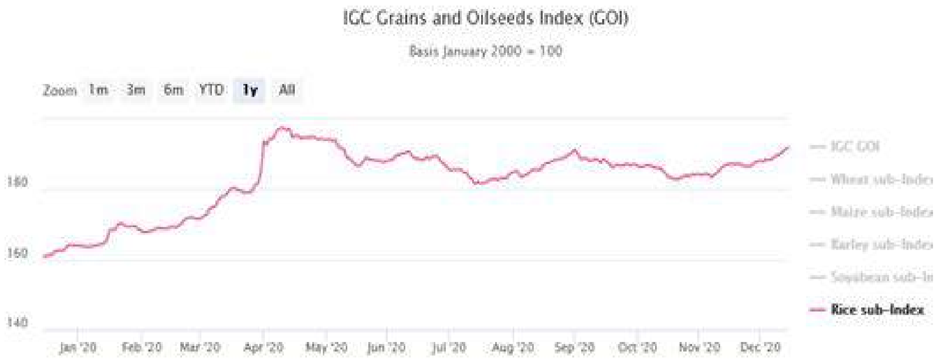
Despite harvesting pressure in several Asian exporters, average international rice prices were stronger over the past month. Vietnamese quotes rose to a nine-year high following storms which boosted domestic demand and delayed harvesting. Thai values also firmed, on strength in the local currency and with sentiment underpinned by high Vietnamese values, albeit as main crop paddy arrivals and subdued buying interest pared gains. In contrast, Indian offers declined on seasonal harvesting pressure, with some offsetting support from government paddy procurement.

Top Producers

- **China** (29% of world production[1]): At the end of November, harvesting of late-season rice is wrapping up under favourable conditions (AMIS Crop Monitor of November). Estimates vary between 144 and 148 Mt (AMIS, IGC, USDA) with no move on m/m.
- **India** (21%[1]): Conditions are favourable for Kharif rice as harvest is wrapping up in the northern states and beginning in the southern and eastern states. All estimates predict a stable production around 120-121 Mt.
- **Indonesia** (9%): Harvesting of dry-season rice is wrapping up under favourable conditions with a noticeable increase in harvested area compared to last year. Sowing of wet-season rice is continuing under favourable conditions, albeit slowly due to uneven rainfall, and recovered from dry conditions until September. Estimates predict a production slightly up y/y (+1%), at 35 Mt (USDA, IGC, AMIS).
- **Vietnam** (9%): Harvesting of wet-season rice in the north is wrapping up under favourable conditions. In the south, conditions are favourable as the harvesting of the summerautumn (wet-season) crop is wrapping up and the harvesting of the autumn-winter (wet-season) crop continues. Sowing of the winter-spring (dry-season) crop in the south has begun under favourable conditions. The USDA and AMIS predict 2020 output around 27-28 Mt (-2% y/y).
- **Thailand** (6%): Wet-season rice is in the grain filling stage under favourable conditions with an increase in total sown area compared to last year. The harvest forecast rebounds to 19 Mt (USDA, AMIS, IGC), +4% vs 2019.

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





MED-Amin Countries

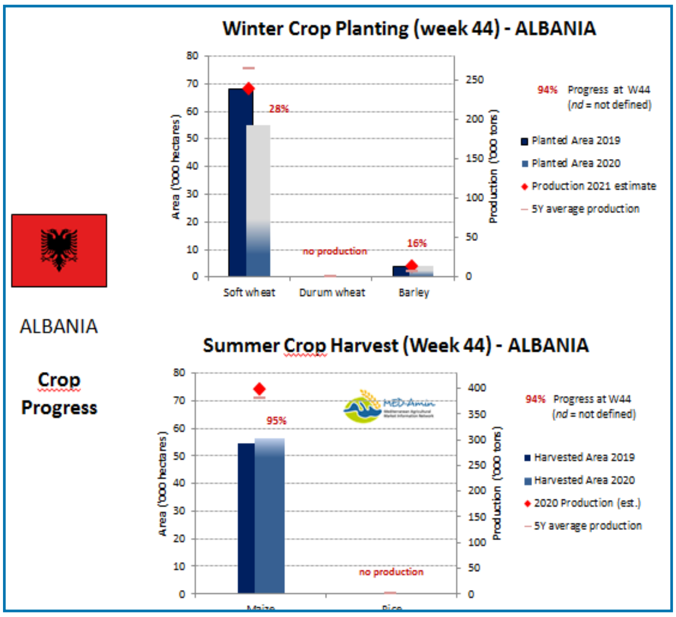
Albania

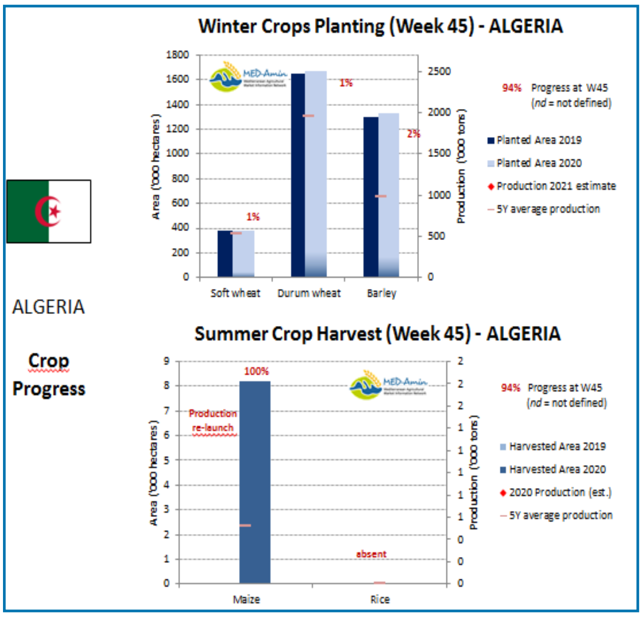
Soft wheat production for 2021 is estimated at 237.610 tons (see graphs besides), according to the planting progress it is aproximately the same trend with the long-term average, earlier than last year, with a little decrease because of the reduction of planted area (around 55,000 ha, -19% y/y), a consequence of crop rotation (mainly towards spring crops). For Barley, acreage for 2021 output is planned on more than 4,000 ha (+4% vs last year). The meteorological conditions during planting campaign for Soft wheat are good. So far, forecast is in line with long-term average for yield (due to good quality of seeds). Maize production for 2020 is expected to be 391’170 tons, according to the data (harvest progress was 95% at Week 44, a bit in advance compared to last year) on a bigger harvested area at 56,607 ha (+4% y/y). The overall campaign was affected by favorable climate conditions. This campaign could be defined as optimal for summer crops (for planting, maturity up to harvest). The results are approaching forecasts indicating slightly higher yields vs 5Y average. Increase of the planted area mainly due to second cropping of corn (starch corn).

Algeria

This winter grain planting is characterized by slight advance vs last year campaign. At Week 45, progress planting is 18% for Barley, 7% for durum and 3% for soft wheat (see graphs besides). Planted areas are expected to increase by 1 to 2% vs 2019, to reach 1.325 Mha of barley, 1.67 Mha of durum and 0.382 Mha of soft wheat. Current conditions are bad for the planting operations due to rains deficit throughout the country, in particular in productive regions. Nevertheless, planting can extend until the beginning of 2021 and receive more beneficial conditions to offset the difficult start.

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



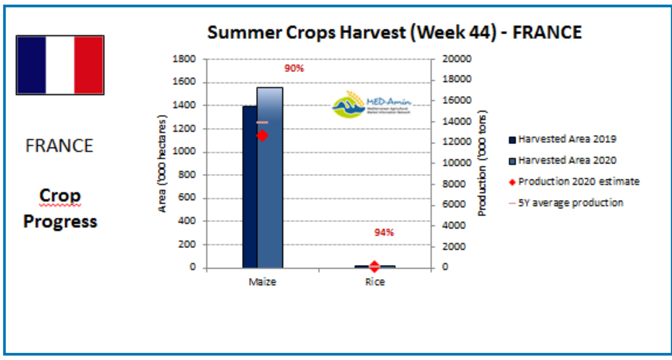


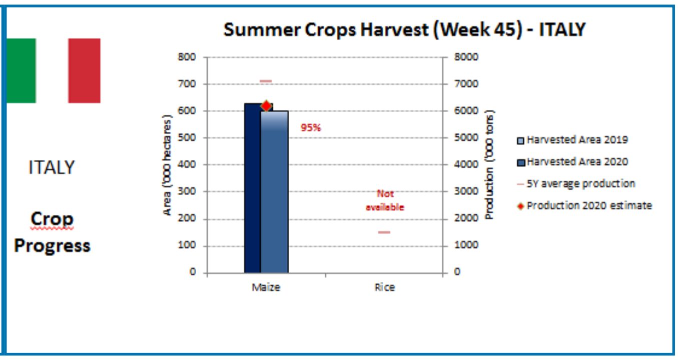
Egypt

2020 winter crops estimates predict 8.9 Mt of wheat (slightly up from last year), 0.2 Mt of barley (equivalent figure for imports). Wheat imports are to rise to 12.5-13.5 Mt depending on estimates, 4% up from last year (AMIS, IGC). Harvesting of 2020 maize and rice crops, expected to be completed by November, is ongoing under favourable conditions (GIEWS Country Brief, October 30). 2020 maize output is expected to increase a bit between 6.4 and 7.5 Mt (upon the estimates from IGC, USDA and AMIS), harvested on 1.1 million hectares. So are imports, to 10.5 Mt, driven by increasing feed demand. Rice crop is set from 4 to 4.5 Mt and a minimal import level this year around 0.25-0.4 Mt (USDA, IGC). Sowing of the 2021 winter wheat will start shortly after, followed by sowing of winter barley. Cereals are grown on irrigated fields, resulting in relatively stable yields. The plan for the 2020/21 crop year calls for 3.6 million feddans (1.51 million hectares) to be planted with wheat.

France

Excessive rain has slowed down the sowing and improved greatly soil humidity. So far, the planting progress of winter crops is “on time” (76% over for soft wheat, 28% for Durum, 87% for Barley), back to normal after the late starting of 2019 planting campaign (see graphs hereafter), and conditions are good. We expect an increase acreage y/y, as sowing conditions are currently more favorable than those of last year. Following a difficult sowing campaign for winter crops in 2019, there were a large number of transfers to spring/summer crops which greatly benefited maize (area up 11.5% compared to the previous campaign). The maize cycle was impacted by a lack of water during flowering, which could have locally impacted yields, especially on non-irrigated crops. There are very heterogeneous returns on the territory in France. The strong summer heat that continued until September accelerated the vegetative cycle of corn, whose median harvest date is 10 days ahead of the average of the last 5 years (94% over at Week 44), leading to mixed crop conditions (42 % poor, 53 % good, 5 % excellent (Céré’Obs report as of Week 44). Maize production is estimated at 12.6 Mt (+2% y/y), with average yields around 8.1 t/ha. The rice harvest suffered a delay of about 15 days and did not start until the first days of October (90% over at Week 44). Production is estimated at 81,900 tons and yields around 5.8 t/ha.





Greece

Wet and warm weather prevailed in Autumn. Rainfall was unequally distributed in space and time (occurring mainly on 18 September and 10 October). Unconventional pluviometry was caused by ‘medicane’ (Mediterranean hurricane) Ianos[2], which was also responsible for floods[2] along the valley of Thessaly. These led to some delays in maize harvesting (88% complete at week 45) and localised yield losses. Production is estimated at 1.16 Mt (-89% vs 5-Y average) over an expected harvested area of 116,200 ha (+0.6% y/y). This is to account for both the negative impact of the extreme weather, but also the positive growth conditions observed in the northern maize districts. Concerning rice, a slight increase in harvested area to 27,700 ha (+5% y/y) due to an increase in producers’ price and good yields lead to 220 thousand tons. The sowing campaign for 2021 winter crops has been partially delayed (about 35% complete of the total for the three monitored crops at week 45) and made difficult germination in most crops according to most of local experts as a consequence of local droughts in addition to continuous heat in October and November. Acreage is expected to decrease significantly for soft wheat to 74 thousand hectares (-18% y/y) and for durum to 255,000 ha (-4%) whereas it rebound for barley to 137,000 ha (+5%) triggered by good prices for malting/ brewing supplies.

Italy

After the drought of mid-March and late April (in the sowing phase - emergence), in June and July there were many and well distributed rains. The rains continued even in August. In general, temperatures were cool with rare excess heat. Maize harvest is slightly delayed vs average due to later flowering (95% over at Week 45, see graphs above). Production estimates are to 6.2 Mt, with average yields at 10.3 t/ha. Last estimates for winter crop indicate 4.1 Mt for durum wheat, 2.8 Mt of soft wheat and 1 Mt of barley (DG Agri Nov 26). The autumn was generally wet in all the northern regions and along the Tyrrhenian coast. Precipitation was mainly concentrated in October, with unusual rainfall episodes on 2 October in Liguria and Piemonte (74 mm and 65 mm in a day, respectively) that could have hampered some winter crops planting.

Lebanon

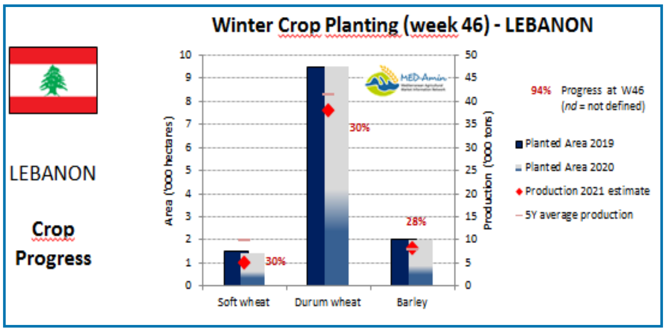
The first substantial rainfall of the season was recorded in November and eased concerns over early season drought. Economic collapse due to COVID 19 and the economical situation in Lebanon impacted negatively winter crop acreage. Seeds, fertilizers and plant protection material remain available, albeit at high prices. As most agricultural inputs are imported, the continuing currency depreciation on the parallel market increases their cost in the local currency. Most farmers lack the adequate liquidity to purchase inputs (GIEWS Country Brief, Dec 10). In 2020, the total cereal production is estimated at about 134,000 tonnes, similar to the 2019 weather-stricken harvest and almost 20 percent below the five-year average (see graphs besides). In the 2020/21 marketing year (July/June), the cereal import requirements, mainly common wheat for human consumption and maize to feed livestock and poultry, are forecast at an about average level of 2 million tonnes, similar to the previous year. Area planted with soft wheat to be harvested in 2021 is supposed to be reduced by 7% y/y to 1.4 Mha (and despite the new agricultural strategy that encouraged farmers to cultivate soft wheat), stable for durum wheat at 9.5 Mha. Planting is delayed vs last year, completed about 30% at Nov 18. Neither maize nor rice is cultivated in Lebanon.

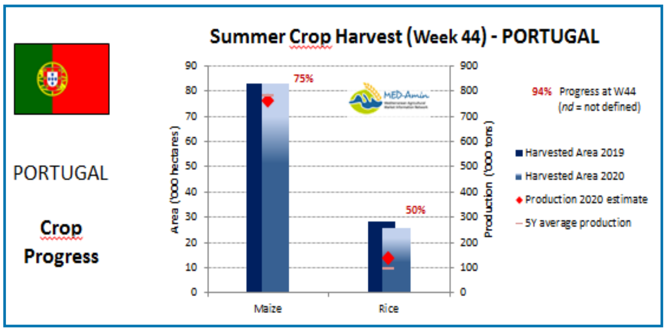
Morocco

Soil preparation for sowing of the 2021 grain crops is currently ongoing under favourable weather conditions. Seasonal rains started in September with above average amounts in most cropping areas. Plantings of winter wheat

[2] : https://www.cmcc.it/article/the-medicane-ianos-fingerprint-as-sweeps-across-greece , https://emergency.copernicus.eu/mapping/list-of-components/EMSR465

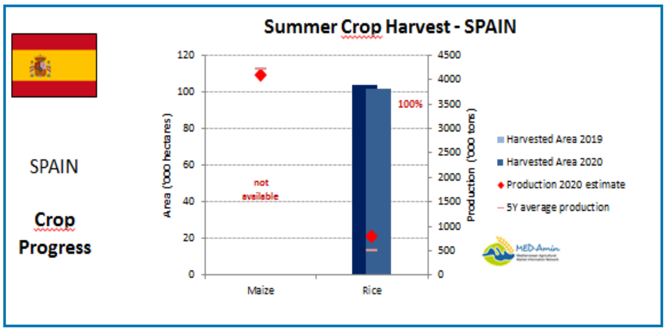
and barley crops started early November after the rains adequately replenish soil moisture. Concerning 2020 winter crops, major harvesting operations finished in July. The season was characterized by poor rainfall, both in terms of amount and distribution, coupled with high temperatures. Rains in late March and April 2020 proved to be too late for a production recovery of the winter grains that were already at filling to maturing stages. According to official estimates, about 2.56 Mt of wheat were harvested in 2020, a decrease of about 40 % y/y and less than half of the five year average. Barley output in 2020 amounted to 640 000 tonnes, almost 45 % y/y and less than one third of the five year average. The 2020 harvest is the third lowest one on record in the last 20 years. A firm imports pace to date and forecasts for a continuation of brisk sales to the country underpin a revision upward in the import estimate for 2020/21, now raised to 6.5 Mt (USDA, Nov 26).





Portugal

Rainfall was 20-50% of the long-term average for the period 1 September to 20 October – among the driest periods recorded (MARS Bulletin as of 20 October conditions). In November, the weather was hot and rainy and at the end of the month draught in south Alentejo and Algarve was over. Winter crop plantings have not started yet at 31 of October. Concerning 2020 production, soft wheat harvest reached 49 thousand tons (-19% y/5y), durum wheat 8 kt and barley 52 kt. About summer crops, 763 thousand tons of maize are to be harvested (yield 9.1 t/ha, 75% harvest over at 31 October) on 83 thousand hectares (area stable y/y due to maize price stability in the world market). The rice harvested area in 2020 (25.6 thousand hectares) decreased by 10% vs 2019 due to works on Sado Valey irrigation system (i.e. -3,000 ha). The Ministry of agriculture estimates production at 137.5 thousand tons (yield 5.3 t/ha) as harvest is half complete at the end of October (see graphs above).



Spain

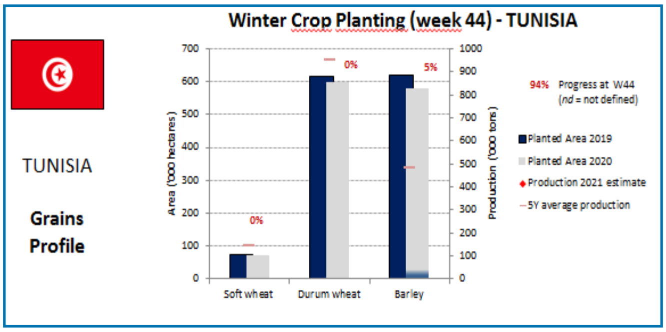
Winter crops are experiencing warm temperatures. The rains of the last few weeks have improved soil moisture and the planting of cereal crops has resumed and is gradually being completed (in line with the average planting pace). In plots already sown, the crops take advantage of humidity level in synergy with the mild temperatures of these days, to achieve a good emergence and implantation on the ground. For summer crops, the maize harvest is proceeding normally, with good yields so far around 11.8 t/ha (see graphs above). The production is estimated at 4.1 Mt (+3% vs 2019). Rice harvest has ended, performed on 101,726 ha (-2% y/y), with outturn seen at 787,322 t (-4% y/y). The production is expected to contract in most of the regions despite favorable conditions throughout the year.

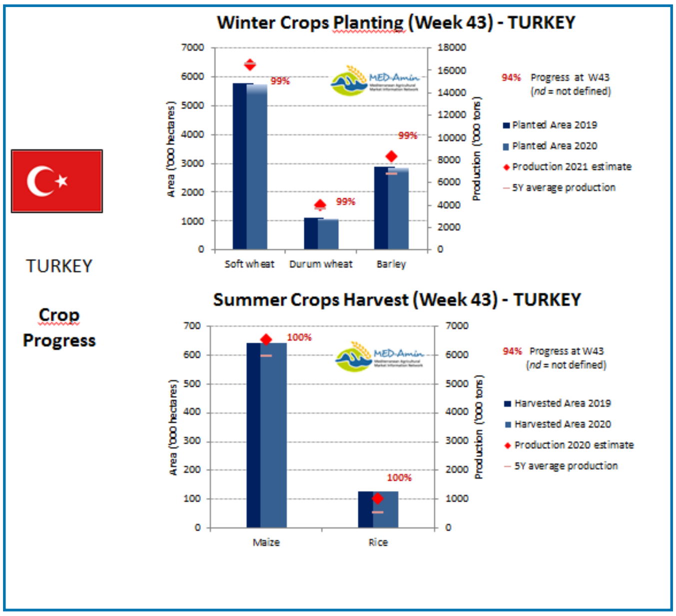
Tunisia

The start of the 2020/2021 agricultural season saw a sharp decrease in rains, particularly during the month of October in all the cereal-producing governorates. The cereal areas programmed for the 2020/2021 campaign have been estimated at around 1.26 million hectares, of which around 838 thousand hectares are in the northern governorates and around 424 thousand hectares in the central and southern governorates, distributed by type as follows: durum wheat: 600.5 thousand hectares; soft wheat: 73 thousand hectares; barley: 577.5 thousand hectares (see graphs below). Hence the winter cereals acreage is expected to decrease between 2 and 7% y/y depending on the crop. Planting has just started for barley as of Oct 31. The expected irrigated areas are estimated at 73,000 hectares, including around 33,000 hectares in the northern regions and around 40,000 hectares in the central and southern regions.

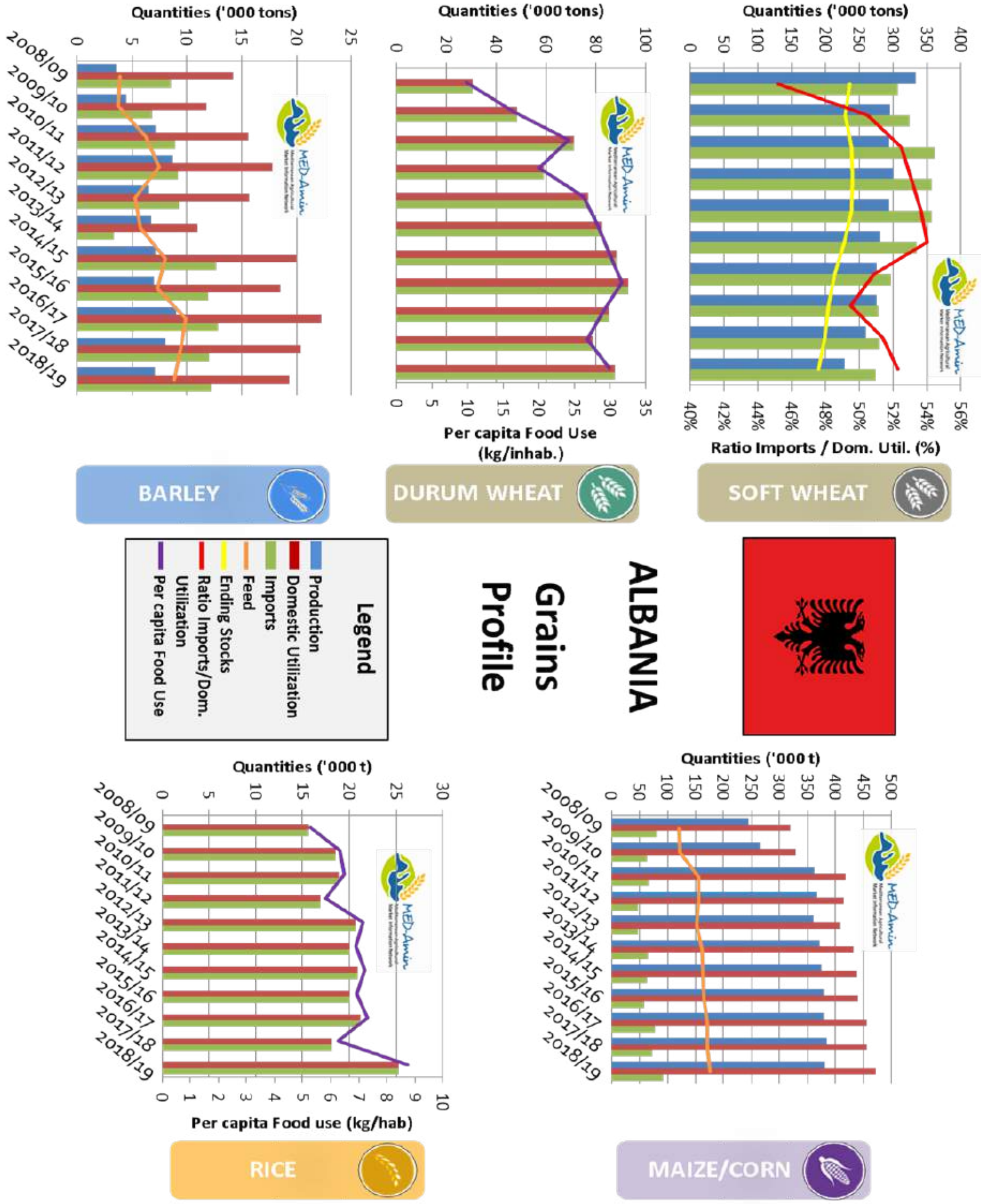
Turkey

Above-average cumulative temperature and scarce rainfall characterised the review period (1 September – 20 October) in almost all regions. A prolonged heatwave occurred in the first half of September in central and eastern regions, leading to maximum daily temperatures 4-6°C above the long-term average. The main effect was that maize and soybean in the cultivated areas in Adana (20% and 66% of average national production, respectively) experienced accelerated grain-filling stages, with moderate impacts on final production. At Oct 23, harvest is complete, collecting 6.5 Mt of maize and 1 Mt of rice like last year, with good quality grains according to the Ministry of agriculture (see graphs below). Estimates of 2020 output for winter cereals have not moved since last bulletin, estimated at 20.5 Mt of wheat (i.e. +4% y/y, of which 16.5 Mt of soft wheat, 4.0 Mt of durum) and 8.3 Mt of barley. Plantings of wheat and barley are 99% complete (this includes total crop figure for winter + spring crops as winter crops corresponds to 99% of the total). Winter wheat (soft and durum) and barley plantings finished at the end of October 2020 on similar acreage y/y. Wheat imports might decrease y/y to 8 Mt according to official sources, to 7.5 Mt according to AMIS (-33% y/y).





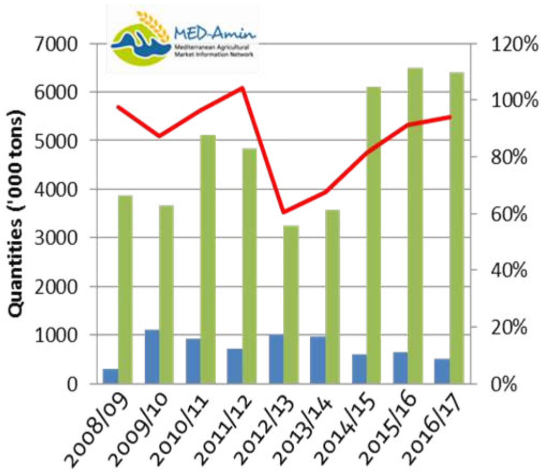
Annex


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

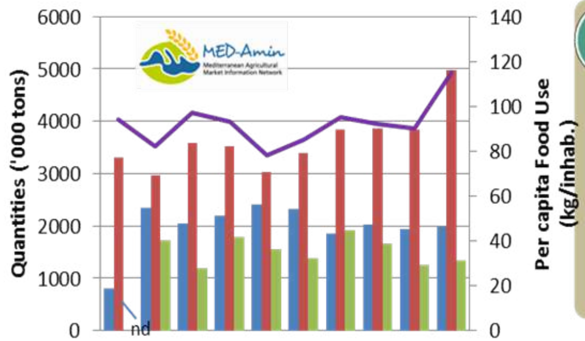
ALGERIA

Grains Profile

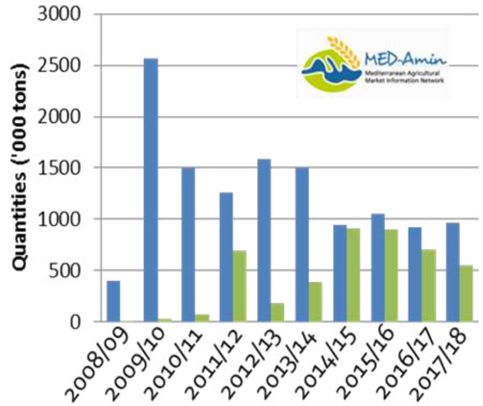
SOFT WHEAT



DURUM WHEAT



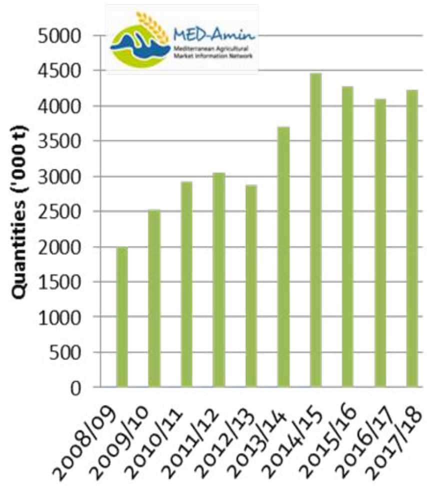
BARLEY



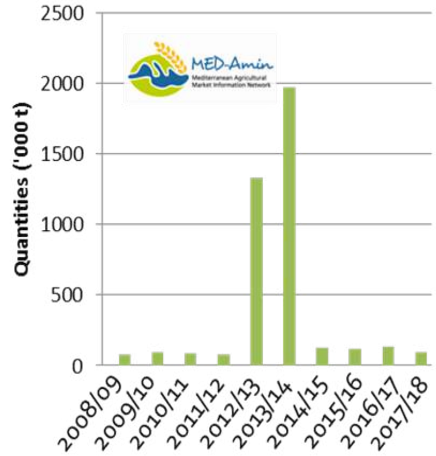
Legend

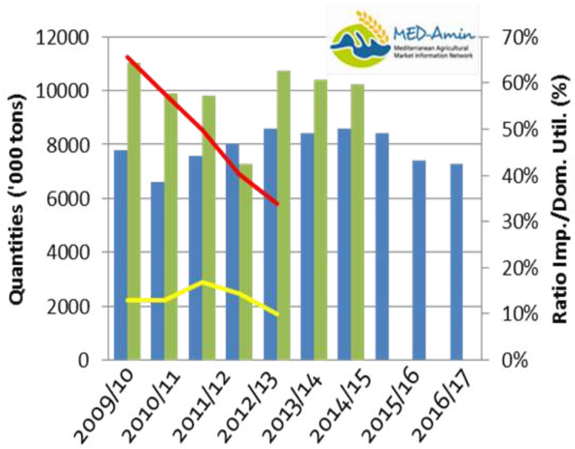
- Production
- Domestic Utilization
- Imports
- Feed
- Ending Stocks
- Ratio Imports/Dom. Utilization
- Per capita Food Use

MAIZE/CORN



RICE

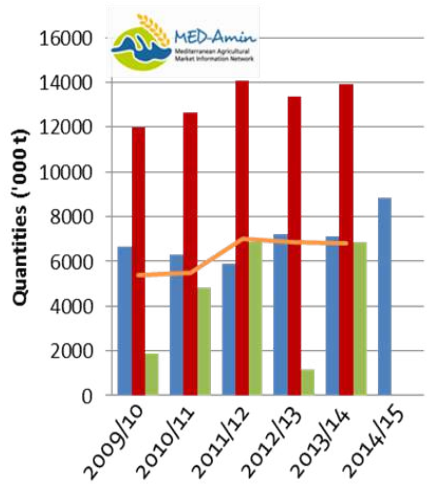




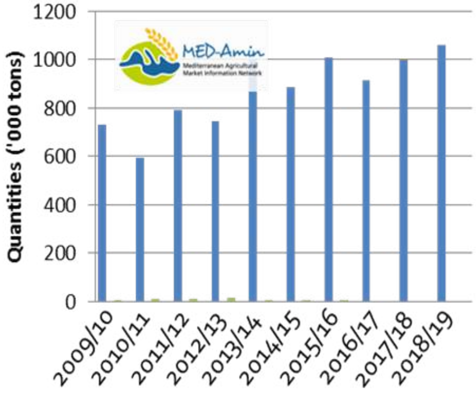
SOFT WHEAT

EGYPT

Grains Profile



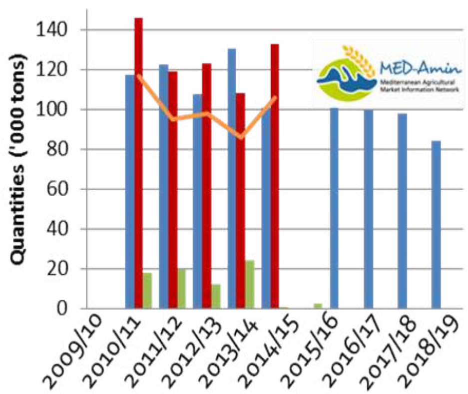
MAIZE/CORN



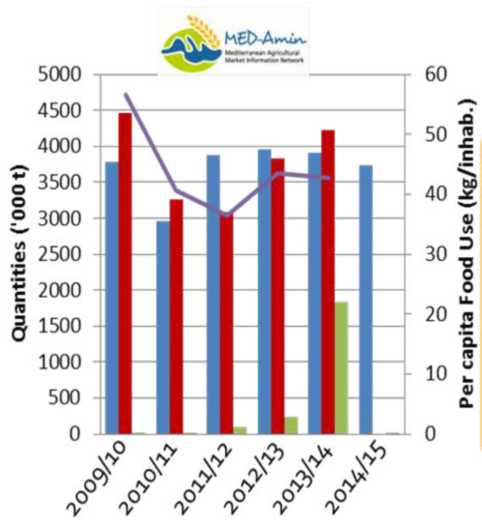
DURUM WHEAT

Legend

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



BARLEY

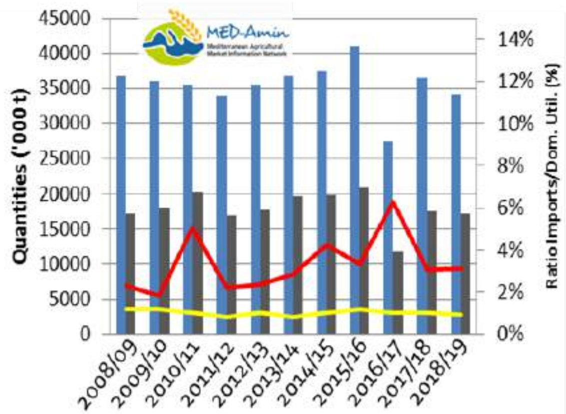


RICE

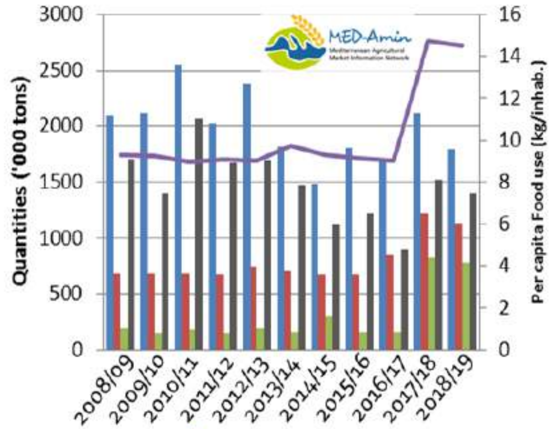
FRANCE

Grains Profile

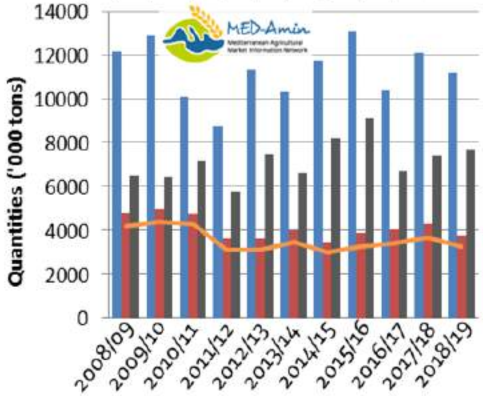
SOFT WHEAT



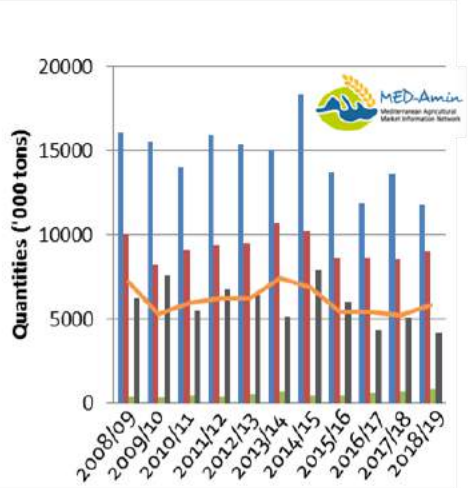
DURUM WHEAT



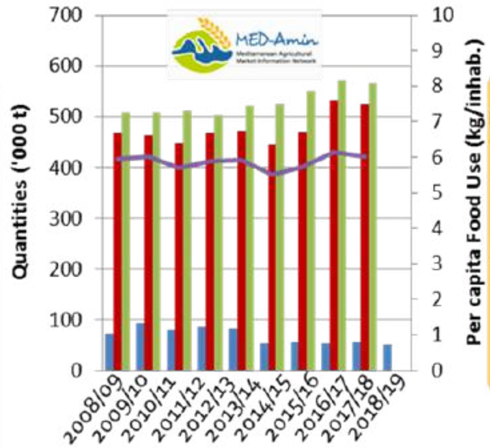
BARLEY



MAIZE/CORN



RICE



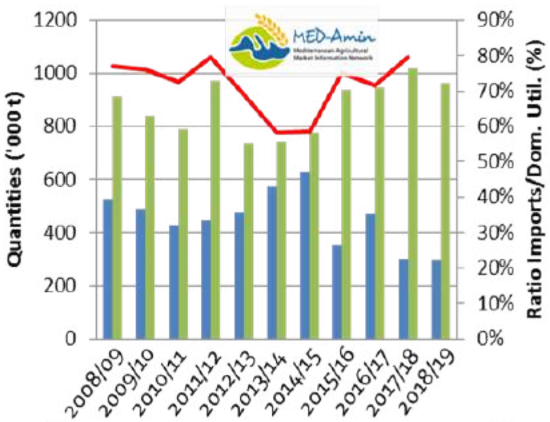
Legend

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

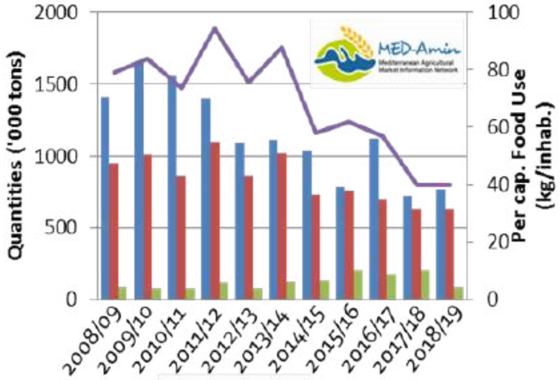
GREECE

Grains Profile

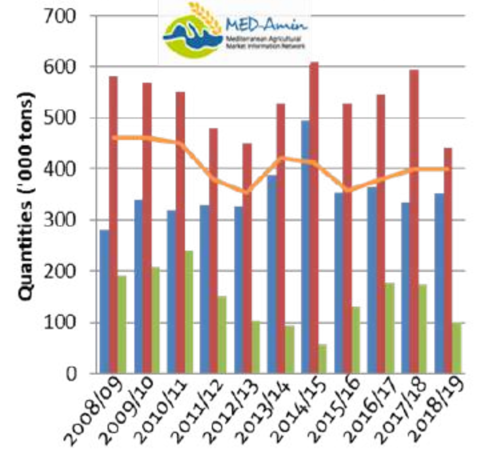
SOFT WHEAT



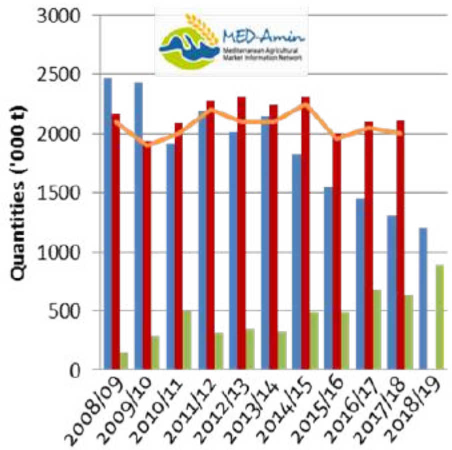
DURUM WHEAT



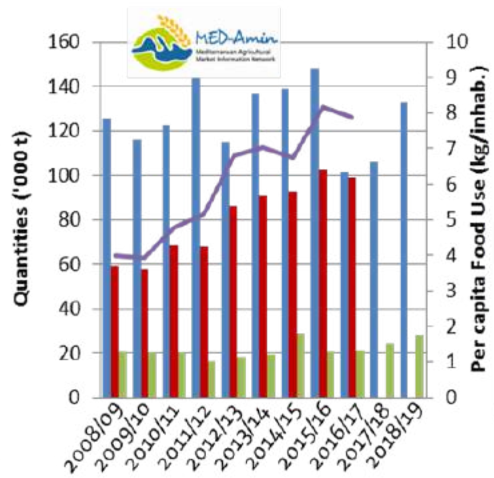
BARLEY



MAIZE/CORN



RICE



Legend

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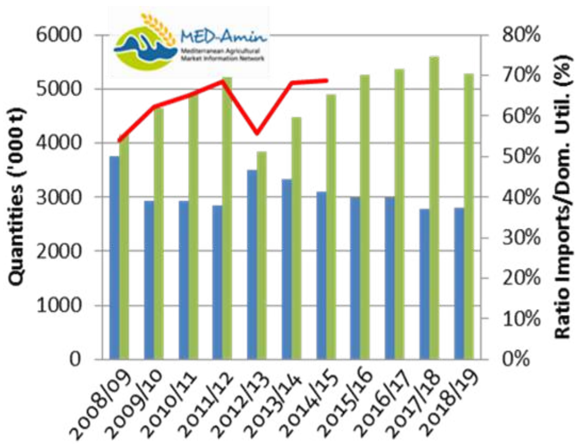
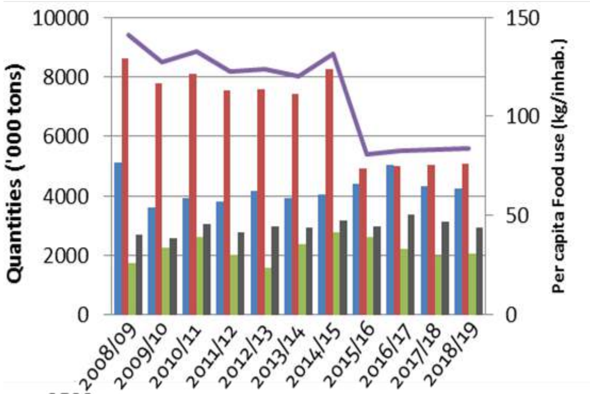
ITALY

Grains Profile

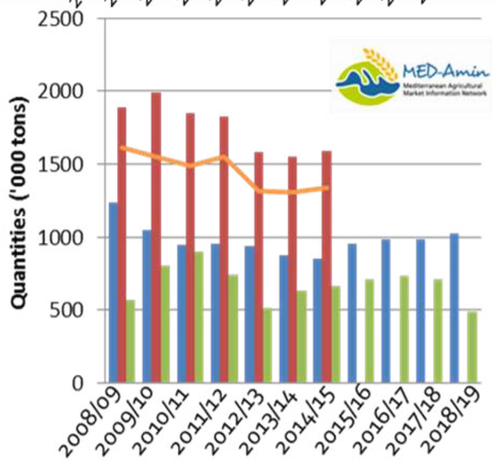
SOFT WHEAT



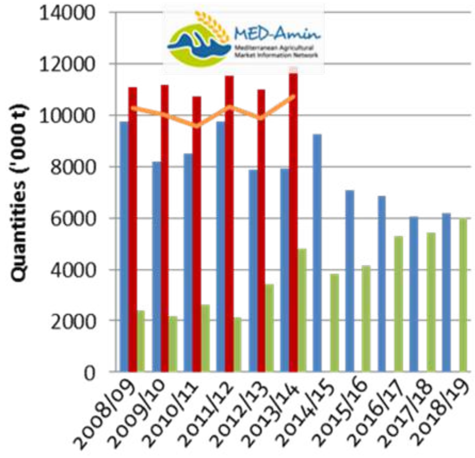
DURUM WHEAT



BARLEY



MAIZE/CORN



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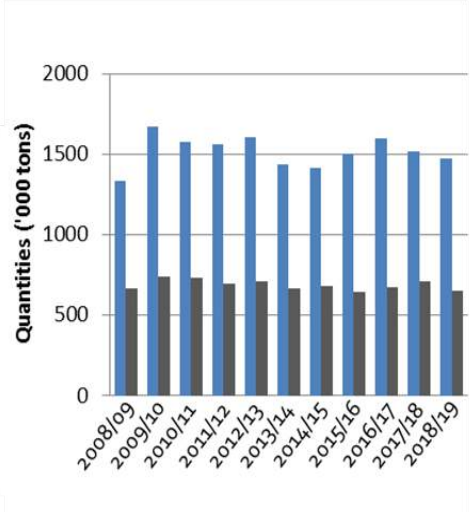


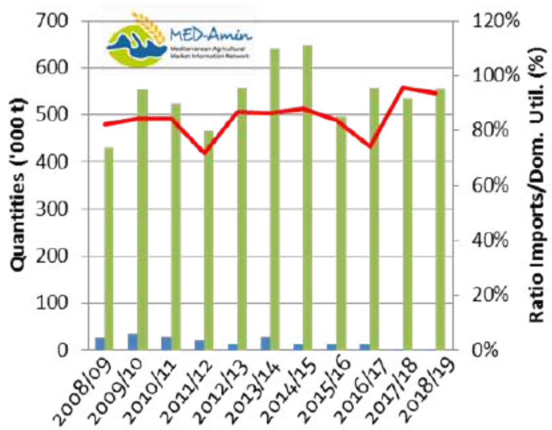
Legend

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

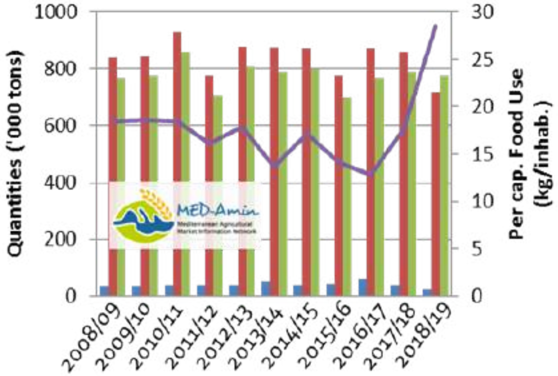
LEBANON

Grains Profile

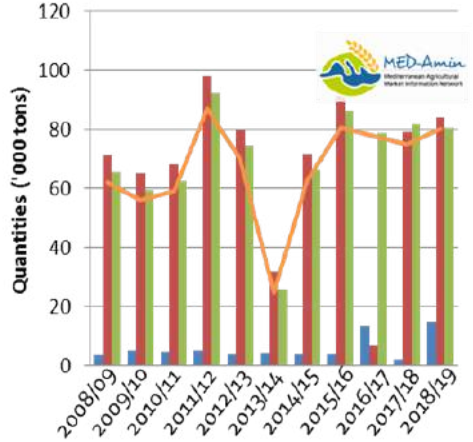
SOFT WHEAT



DURUM WHEAT



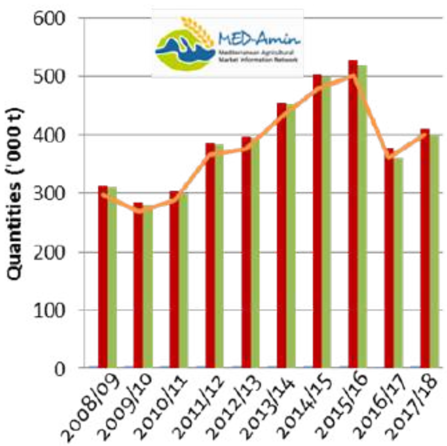
BARLEY



Legend

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

MAIZE/CORN



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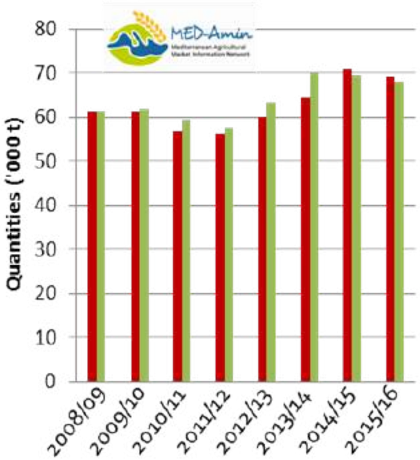
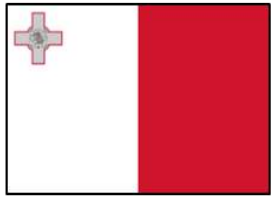


MALTA

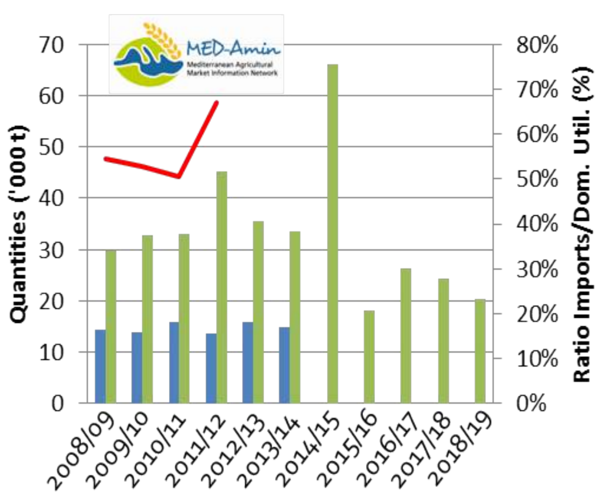
Grains Profile

Legend

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



SOFT WHEAT

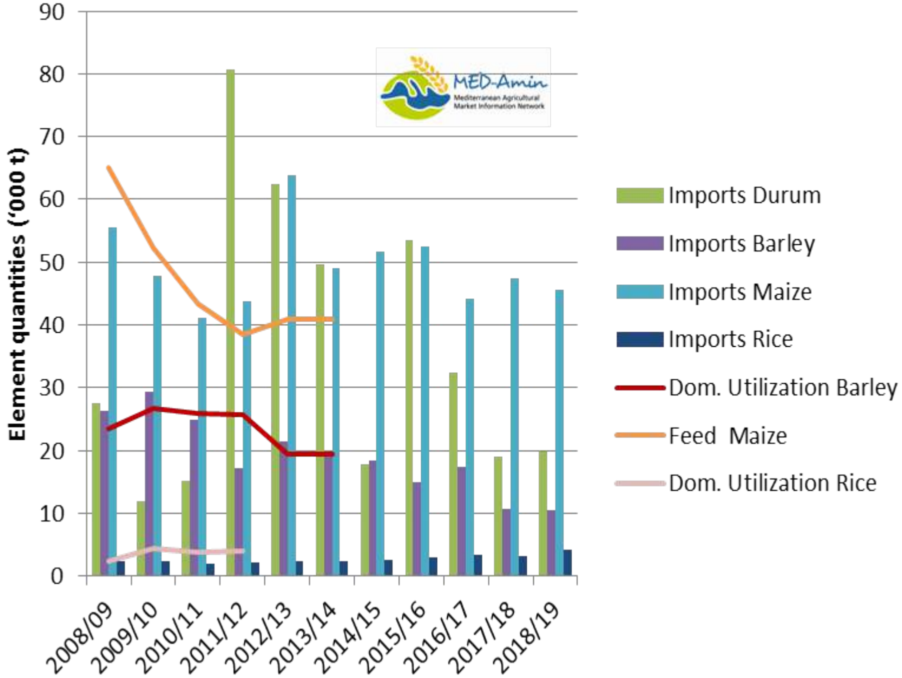


DURUM WHEAT

BARLEY

MAIZE/CORN

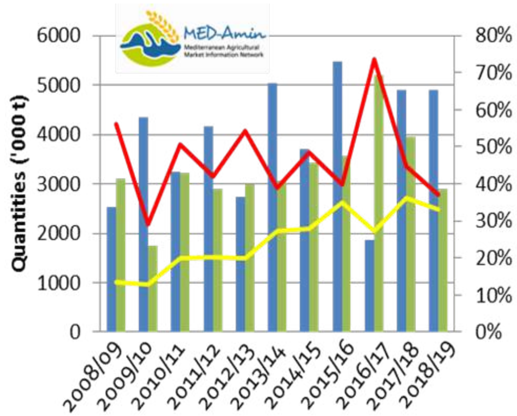
RICE



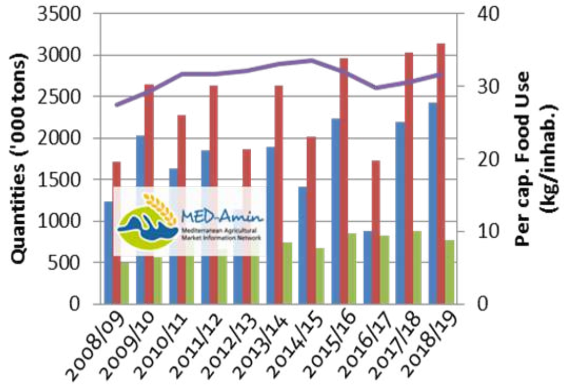
MOROCCO

Grains Profile

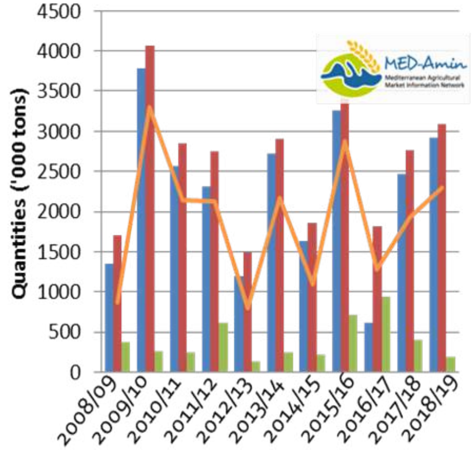
SOFT WHEAT



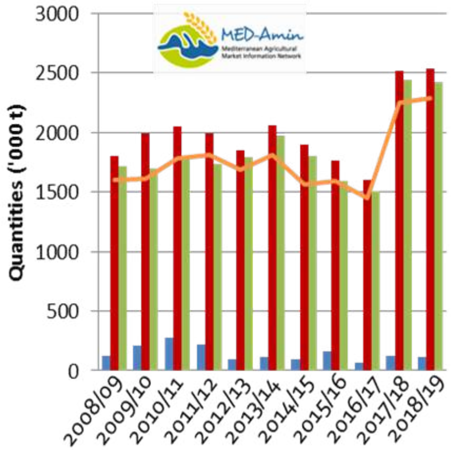
DURUM WHEAT



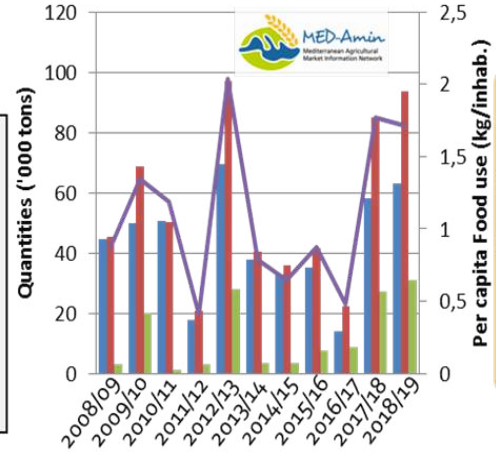
BARLEY



MAIZE/CORN

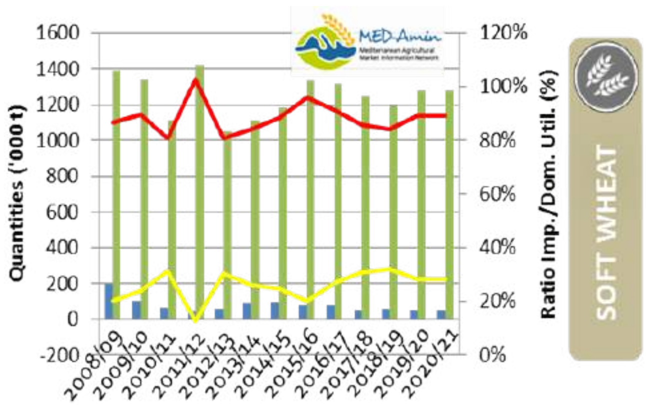


RICE



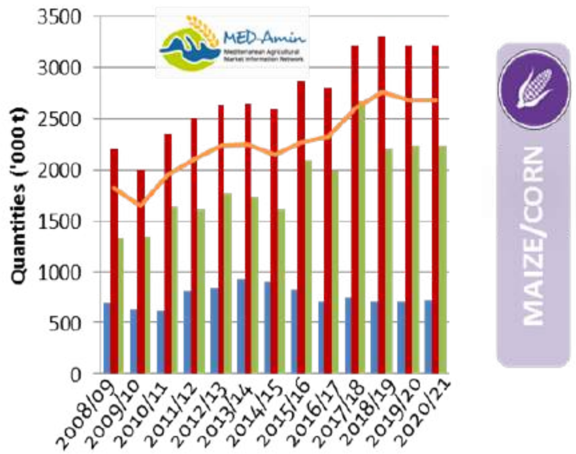
Legend

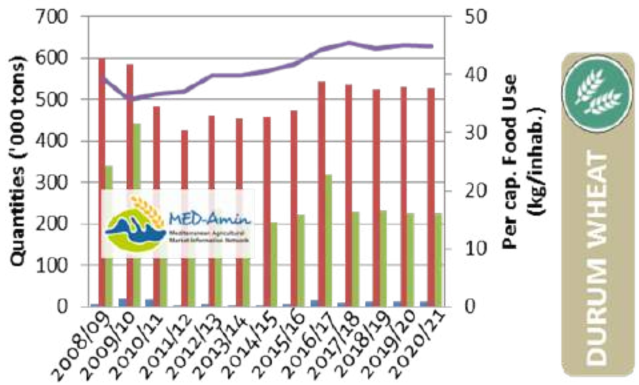
- Production
- Domestic Utilization
- Imports
- Feed
- Ending Stocks
- Ratio Imports/Dom. Utilization
- Per capita Food Use



PORTUGAL

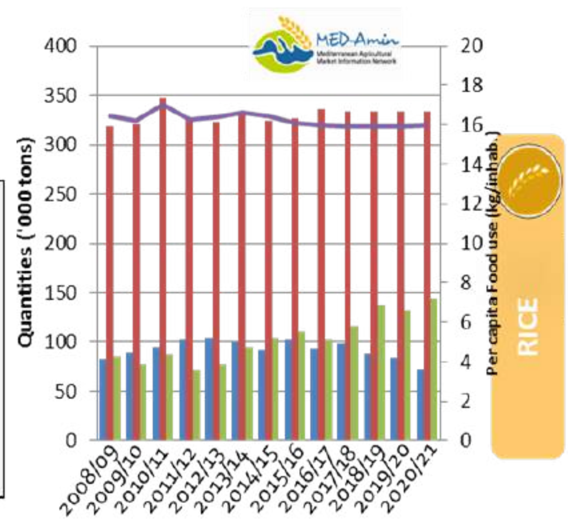
Grains Profile

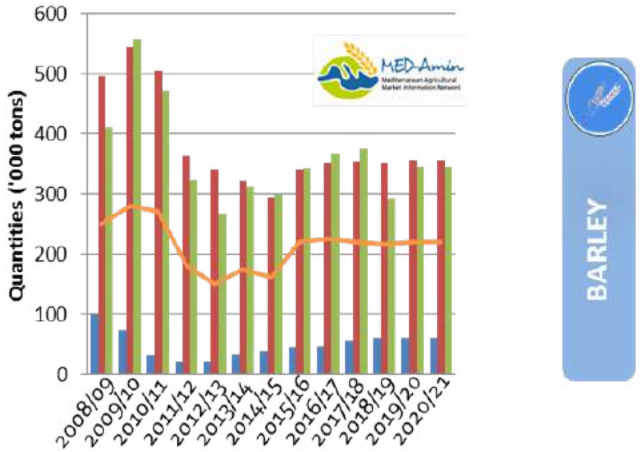




Legend

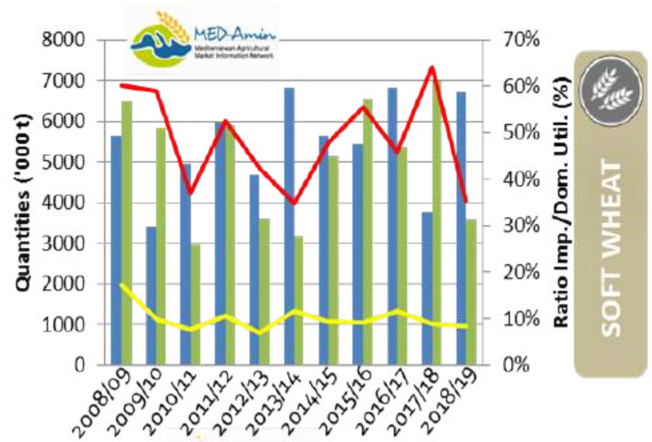
- Production
- Domestic Utilization
- Imports
- Feed
- Ending Stocks
- Ratio Imports/Dom. Utilization
- Per capita Food Use

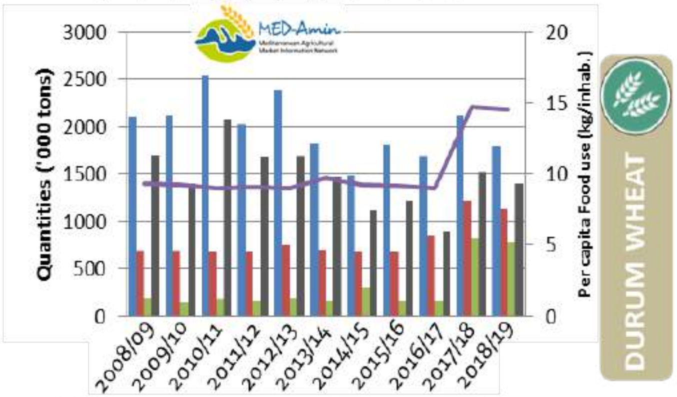


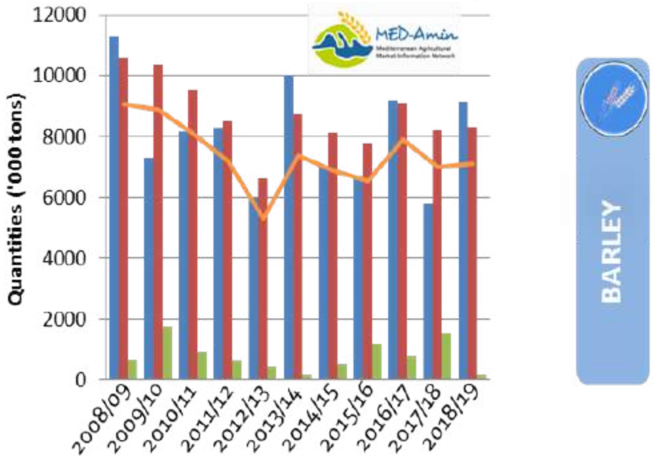


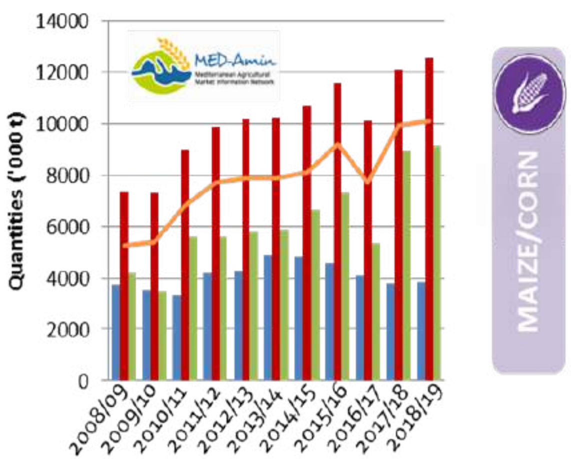
SPAIN

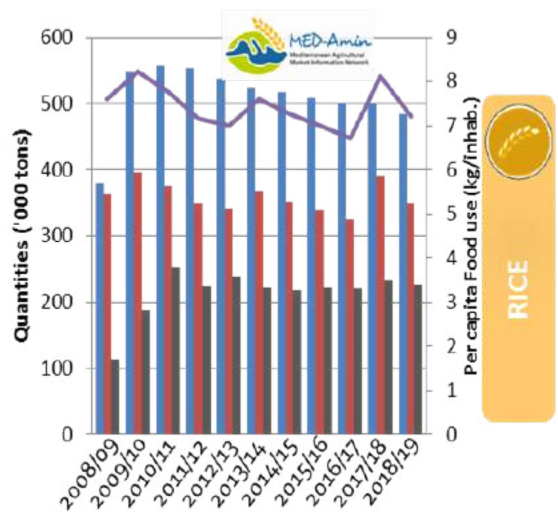
Grains Profile











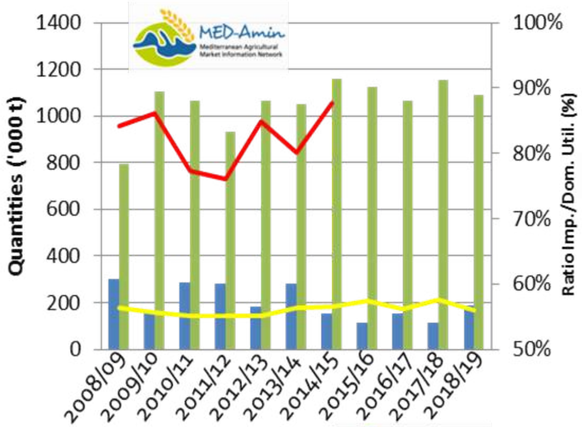
Legend

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

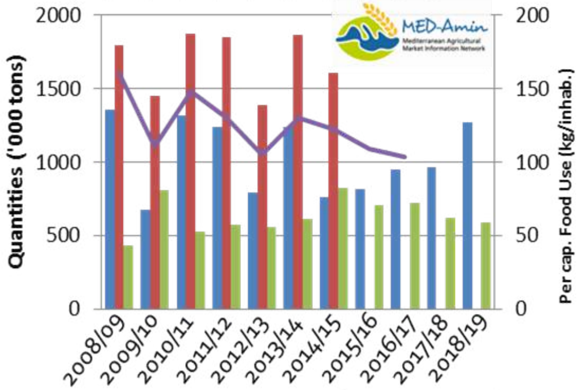
TUNISIA

Grains Profile

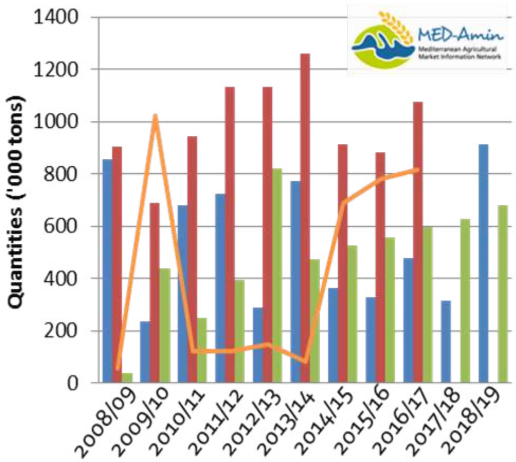
SOFT WHEAT



DURUM WHEAT



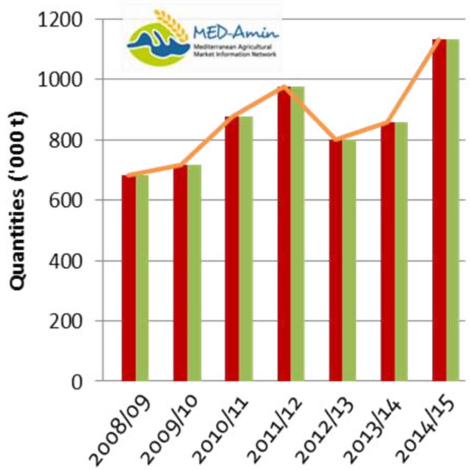
BARLEY



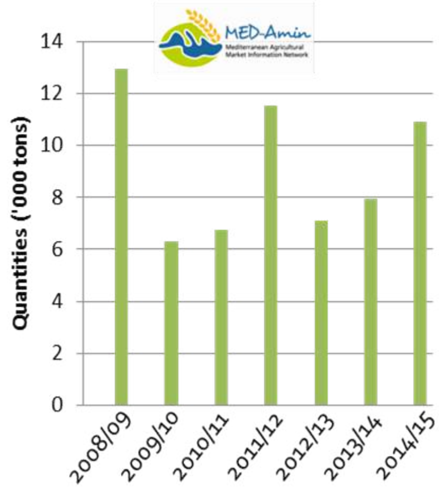
Legend

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

MAIZE/CORN



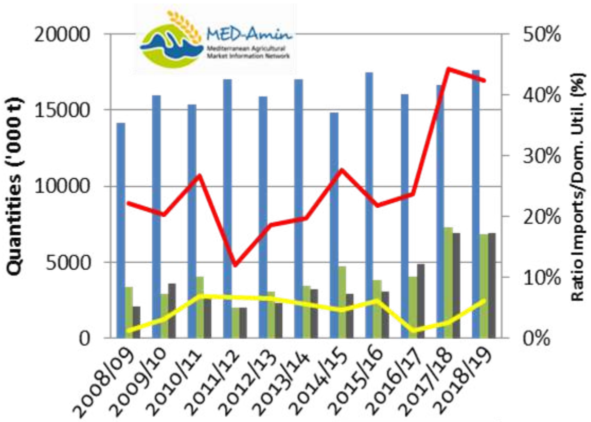
RICE



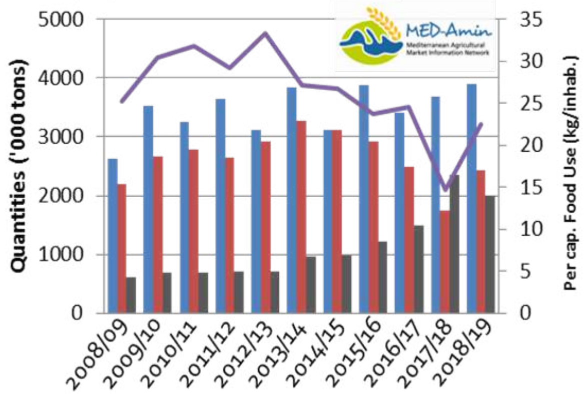
TURKEY

Grains Profile

SOFT WHEAT



DURUM WHEAT



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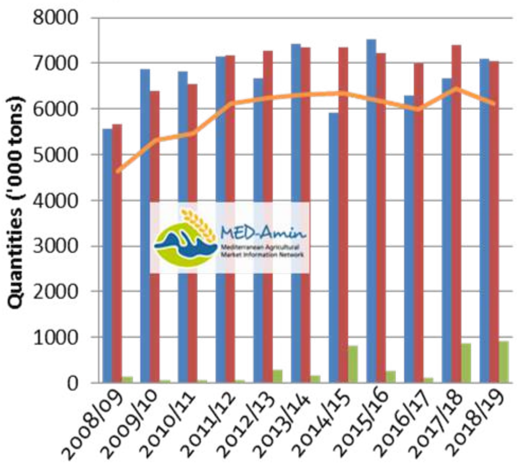
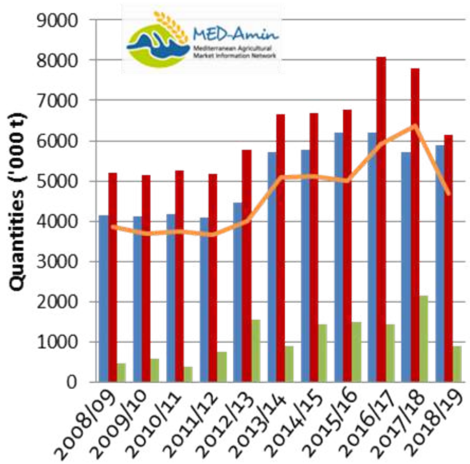


MAIZE/CORN



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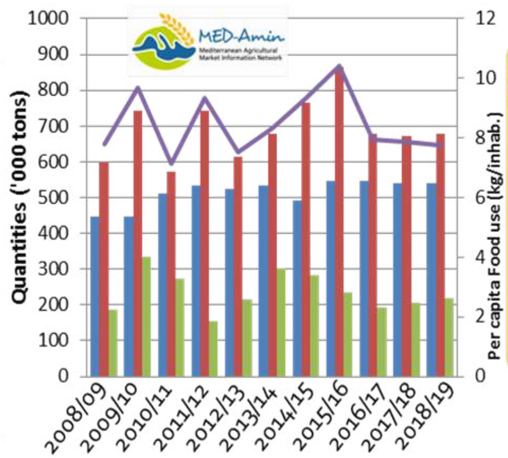

Legend

- Production
- Domestic Utilization
- Imports
- Exports
- Feed
- Ending Stocks
- Ratio Imports/Dom. Utilization
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MED-Amin
Mediterranean Agricultural Market Information Network

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