CIHEAM
International Centre for Advanced
Mediterranean Agronomic Studies

MED-Amin:
Crop & Planting Progress

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MED-Amin
Mediterranean Agricultural
Market Information Network

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

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

Contents

Legend:

Trends this year

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

Wheat (all)

Global trends

It is estimated that, at the end of August, about 80% of wheat in AMIS countries (representing together over 87% of world production) has been harvested. As AMIS does not distinguish between soft and durum wheat, we follow its position here in our overview of the global trends regarding wheat.

- **World:** On August, 12 2016, USDA forecasts a fourth record world-production in a row, at the level of 743.4 mln tons against 734.8 mln tons in 2015/16. Among AMIS participants, we observe the following trends:

- **European Union (18% of world production[1]):** We observe mixed results at the European Union level. The crop monitoring bulletin released by the European Commission (MARS Unit) forecasts yields above the 5-year average (+4.6 for soft wheat and +4% for durum wheat). This result however tends to hide sluggish yields for most countries, except in Belgium, Spain, Portugal, Hungary, Bulgaria and Romania.

The last figures published by the European Commission point to a 142 mln tons production against 160 mln tons in 2015/16. The estimates realized by EUROSTAT reveals that, in average, harvests in the European Union are completed at 97% by the end of august.

- **China (15%):** The country should be reaching the end of the harvest both of winter and spring wheat. USDA forecasts a stable production at 130 mln tons against 130.19 in 2015/16. AMIS gives the following estimates: 130.25 mln tons (2016/17) against 130.19 mln tons (2015/16).
- **India (11%):** Winter wheat is in since the month of June. USDA forecasts a production of 88 mln tons against 86.5 in 2015/16, still below the 2012-14 average (95 mln tons).
- **USA (7%):** If winter wheat is already off the fields, spring wheat's harvest is on its way (48% harvested, on Aug. 14, a bit late compared to last year's, a harvest that was however quite precocious) with improved yields for winter soft wheat (+30%) and for spring soft wheat (+5%), compared to 2015/16. Winter wheat yields are expected to be stable. USDA forecasts a 63.16 mln tons harvest, up almost 8 mln tons against the 2015/16 campaign. AMIS: 56 mln tons (2016/17) against 55.8 mln tons (2015/16).
- **Russia (6%):** The agricultural ministry announced on August 30 that 68.5% of the planted areas have been harvested at yields comparing to last year's (3.26 t/ha in 2015). The quality of grains, however, is expected to be lower than last year's. USDA forecasts a strongly improved harvest of 72 mln tons against 61.1 mln tons in 2015/16, corresponding to a new record for the post-soviet era. Additionally, if these results are confirmed, Russia should take this year and for the first time, the head of the list of wheat exporting countries. AMIS: 64.5 mln tons (2016/17) against 61.8 mln tons (2015/16).

The evaluation of harvest conditions proposed in August 2016 by GEOGLAM as part of AMIS Market Monitor indicated that crop conditions were favorable for the covered countries as a whole. For about 1/5 of harvests in the USA, 90% of harvests in Russia and for all of the harvest in Ukraine, the expected conditions are even considered to be exceptional.

1 2010-14 Average

MED-Amin Area: Harvest Progress - Wheat(all)

Country		Date of measure-ment	Estimated area 2016 ('000 ha)	Area Evolution (n/n-1) (%)	Harvests progress (%)	Progress at the same date last year (%)	Estimated end of harvest	Expected average quality of grains	Meteo during growth	Average Yields (2010-14) (t/ha)
Albania	(soft)	24/07/2016	69	-1%	90%	90%	05/08/2016	+	+	4.1
France	(soft)	01/08/2016	5229	1%	62%	82%	na	na	+/-	7.2
	(durum)	01/08/2016	358	12%	99%	100%	Over	na	+/-	5.2
Greece	(soft)	20-30/06/2016	130	-12%	79%	69%	15/08/2016	+	+/++	3.1
	(durum)	20-30/06/2016	200	-39%	89%	74%	15/07/2016	+/++	+/++	2.8
Italy	(soft)	26/07/2016	566	7.4	100%	100%	na	++	++	5.4
	(durum)	26/07/2016	1433	9.2	100%	100%	na	+	+	3.2
Lebanon	(durum)	31/06/2016	14	nd	100%	100%	31/06/2016	na	na	3.2
Morocco	(soft)	15/05/2016	1575	-32%	100%	nd	na	na	na	1.9
	(durum)	15/05/2016	837	-16%	100%	nd	na	na	na	1.7
Portugal	(soft)	30/06/2016	37	0%	10%	nd	31/07/2016	+	-/+	1.5
	(durum)	30/06/2016	3	0%	10%	nd	15/07/2016	+	-/+	1.8
Spain	(soft)	31/05/2016	1802.7	-1%	nd	nd	31/08/2016	-	na	3.3
	(durum)	31/05/2016	379.3	+9%	nd	nd	31/07/2016	-	na	2.2
Tunisia	(soft)	08/08/2016	87	-13%	100%	100%	08/08/2016	+	-	2.2 (2010-13)
	(durum)	08/08/2016	413	-7.4%	100%	100%	08/08/2016	+	-	2 (2010-13)
Turkey	(soft)	25/05/2016	6600	nd	80%	nd	31/06/2016	-/+	-/+	2.44
	(durum)	25/05/2016	1270	nd	80%	nd	31/06/2016	-/+	-/+	2.7

na: non available

Trends - MED-Amin countries

As regards countries in the MED-Amin area, wheat harvests are over at the end of August.

- **Albania:** The harvest covered a stable sown area of 69 000 ha and reveals a good grain quality, as a consequence of the adequate meteorological conditions observed in the country.
- **Algeria:** According to MARS, pessimistic forecasts are to be expected. On Aug 29, the agricultural Minister announced that cereals harvest forecasts as a whole were down 21% as compared to last year's already difficult campaign whose yields averaged 1.28t/ha (MARS data) (against 1.5t/ha for the 5-year average).
- **Egypt:** USDA forecasts a stable production at 8.1 mln tons. AMIS: 9 mln tons.
- **France:** The French harvests are announced to decline this year to a historically low level (about 29 mln tons for soft, and recoiling at 1.4 mln tons for durum) and to display heterogeneous, non-normal qualities requiring high level of sorting and separation from collecting agencies, in order to adapt the offer to its destinations.
- **Greece:** Climatic conditions in Greece have been normal this year. Occurrences of rain in Central Greece have been monitored during the harvest, but recorded yields are stable or even improved in some regions. In the north, following a mild winter, high temperature in spring favored a good development of crops, but also the development of fungal infections in some regions. It should also be noted that a marked reduction of sown areas was recorded (-12% for soft wheat, -39% for durum wheat).
- **Italy:** Harvests are expected to be good to excellent, with improving protein rates.
- **Morocco:** The provisional data provided by Morocco indicate strongly recoiling yields (soft: 1.2t/ha against 1.86 t/ha for the 5-year average; durum 1t/ha aginst 1.7t/ha 5-y.a.). This very difficult harvest is a consequence of a precipitation deficit observed between Nov. and January, coupled with high levels of heat.
- **Spain:** The data provided by Spain, sent on May 31, record degraded meteorological conditions during crop growth. While the total harvested area for soft wheat is stable, durum wheat areas have been extended (+8.6%).
- **Portugal:** In spite of mixed growth conditions (degraded between March and May, improving in June), the data communicated by Portugal in July leaves hope for a good quality of the grains harvested.
- **Tunisia:** According to the initial data provided by Tunisia, harvests have suffered a lot and point towards strongly recoiling final harvested areas (durum: -21% against the 5-year average; soft: -23,5%/5-y.a)
- **Turkey:** The yields expected by MARS are also expected to be consistent with the 5-year average (2.69 t/ha) but inferior to last year's (2.9 in 2015/16 or about -7.4%). Following the same trend, USDA forecasts a 17.5 mln tons harvest against 19.5 (2015/16). AMIS: 20.5 mln tons (16/17) against 22.6 mln tons (15/16).

Corn

Global trends

It is estimated that about 15% of corn in AMIS countries (that is over 90% of the world production) has been harvested at the end of August.

- **World:** On August, 12 2016, USDA forecasts a world level harvest of 1028 mln tons against, 959.7 mln tons for 2015/16. Among AMIS countries, we observe the following trends:

- **USA (29% of world production[1]):** Harvests in the USA have not started yet (starting is usually scheduled in mid-September). USDA forecasts a 384.9 mln tons production for 2016/17 against 345.5 mln tons last year. AMIS provides the following forecasts: 366.5 mln tons (2016/17) against 345.5 mln tons (2015/16). The development stage and conditions recorded are equivalent to those last year (USDA Crop progress).

- **China (18%):** Corn fields in the southern region should already have been harvested, whereas harvest in the North is currently in progress and should define the extent of the region's imports needs in foreign corn. USDA forecasts a 218 mln tons harvest (6.6 mln tons less than in 2015). AMIS forecasts for its part 218.04 mln tons (2016/17) against 224.6 mln tons (2015/16).

- **Brazil (6%):** The first harvest (around 40% of the total Brazilian production) has been over since the start of the summer and the second harvest is finishing now. It is estimated that, in average, 95% of the harvest is in at the end of August. USDA forecasts for 2016/17 a harvest that is consistent with the 2012-14 average (80 mln tons against 68.5 mln tons in 2015/16). AMIS: 73.5 mln tons (2016/17) against 85.5 (2015/16).

- **European Union (6%):** Harvests have not started yet. USDA forecasts a 62.1 mln tons harvest in 2016/17 against 59.1 mln tons in 2015/A6. The MARS Unit forecasts a harvest that would be much better than last year's and general yields are expected to be above the 5-year average (7.42 t/ha or +7.1%). AMIS: 66 mln tons (2016/17) against 58 mln tons 2015/16).

- **Argentina (2%):** Harvests of corn are usually over at the end of July/early August. USDA indicates a higher harvest at 36.5 mln tons for 2016/17 against 28 in 2015/16. AMIS: 37.9 mln tons (2016/17) against 33.8 mln tons (2015/16).

The evaluation of harvest conditions proposed in August 2016 by GEOGLAM as part of AMIS Market Monitor indicated that crop conditions were favorable for these countries as a whole, except in China and Brazil for about 50% the harvest in each of these countries.

1 2010-14 Average

MED-Amin Area: Planting Progress - Corn

Country	Date of measurement	Estimated area 2016 ('000 ha)	Area Evolution (n/n-1) (%)	Planting progress (%)	Progress at the same date last year (%)	Estimated end of planting	Average yields (2010-14) (t/ha)
Albania	24/07/2016	54	-1%	100%	100%	na	6.7
France	01/08/2016	1562	-4,7%	100%	100%	na	9.2
Greece	1-10/04/2016	100	-32%	80%	91%	25/04/2016	11.4
Lebanon	31/07/2016	2.2	na	100%	100%	20/07/2016	na
Portugal	30/06/2016	88	-10%	100%	na	na	7.8
Spain	31/05/2016	373.8	-5%	na	na	31/06/2016	11
Turkey	25/05/2016	686	na	30%	na	09/2016	7.7

na: non available

Trends - MED-Amin countries

As far as corn in the MED-Amin area is concerned, the harvest will begin in general in the month of October, except in Albania, where the harvest should be over and in Algeria, where the harvest should be in half-way through. Most countries in the area experienced average crop conditions, with sustained period of heat however during flowering in Greece and Turkey. As was established above, the expected yields in all European Union countries are above the 5-year average and much better than those recorded last year, with experience of sustained period of drought. (+17.8% compared to 2015/16).

- **Albania:** Sowing is over in Albania for a stable total sown area as compared to last year's.

- **Egypt:** In the same way, in Egypt, the harvests usually take place in October and November. AMIS indicates a stable forecast production (6 mln tons).

- **Greece:** Corn is essentially cultivated in Greece as an irrigated culture. Normal to Favorable grow conditions were observed during sowing. In a number of regions, occurrences of rain may have delayed the process however. In spite of high average yields, sown areas show a significant reduction (-32%) due to the low selling price of maize.

- **Spain:** Sowing ended in June. Spain records an average reduction of planted areas of about 5%.

- **Portugal:** As in other countries of the area, Portugal's corn production is essentially irrigated (91%) and recorded this year a marked reduction of sown areas (-10%) linked to weak world prices. The recorded growth conditions were mixed so far (degraded between March and May, rather good in June).

- **Turkey:** the harvest has just started in average, as only the mid-east region of Turkey is harvesting at this period (about 10% of the total production). MARS bulletin forecasts yields at 9.25 t/ha (against 9.30 last year). AMIS forecasts a 6 mln tons production against 6.4 mln tons in 2015/16. The second Turkish corn harvest is being realized as we speak in Turkey (it extends between June and October).

Barley

Global trends

The European Union, Russia, Ukraine, Canada, Australia, Turkey and the USA are the world largest producers of Barley. They represent together 78% of the world's production (average 2010-14).

- **World:** On August, 12 2016, USDA forecasts a world level harvest of 145.3 mln tons against 148.9 mln tons for 2015/16. Among AMIS countries, we observe the following trends:

- **European Union (41% of world producion[1]):** Harvests are over in most European countries (Harvests in June/July in France and Spain, Germany and the UK (winter barley); in July/August: UK (spring barley); and in August/September in Sweden; while German spring barley harvest can extend during September). USDA forecasts a stable level of production at 61.2 mln tons against 61.5 for campaign 2015/16. On July 25, MARS Bulletin indicates yields forecasts above the 5-year average (+4.8% for spring barley and +5.8 for winter barley) up and down respectively, as compared to last year for spring and winter barley.

- **Russia (11%):** The agricultural ministry announced on August 16, that winter barley harvests had been realized for 53.9% of planted areas, for a total 12.25 mln tons and an average yield of 2.72 t/ha (against 2.53 in 2015). USDA forecasts a 19 mln tons harvest against 147.1 mln tons in 2015/16.

- **Ukraine (6%):** The Ukrainian authorities announced in a communicate dating August 17 that harvests were over and had produced 9.8 mln tons against 8.5 mln tons the previous year.

- **Canada (6%):** The Canadian campaign is just starting and may extend to mid-October. USDA forecasts for this country a harvest of about 8.5 mln tons, against 8.2 for the campaign 2015/16.

- **Australia (6%):** The Australian harvest usually extends between October and January. At this still early stage, USDA forecasts good harvest conditions with a 9.4 mln tons estimate against 8.6 in 2015/16.

- **Turkey (5%):** The Turkish barley harvest, usually realized in June-July, is now over. USDA projects a quite feeble harvest of 4.8 mln tons against 7.4 mln tons last year.

- **USA (3%):** In the USA, the harvest is, just as last year, a little ahead of schedule as compared to the 5-year average (55% harvest on Aug. 14 against 33% in average at this period). USDA forecasts a harvest down 500,000 tons at 4.3 mln tons.

1 2010-14 Average

MED-Amin Area: Harvests Progress - Barley

Country	Date of measurement	Estimated area 2016 ('000 ha)	Area Evolution (n/n-1) (%)	Harvests progress (%)	Progress at the same date last year (%)	Estimated end of harvest	Expected average quality of grains	Meteo. conditions	Average yields (2010-14) (t/ha)
Albania	24/07/2016	3.2	+28.0%	90%	90%	05/08/2016	+	+	2.1
France	01/08/2016	1405	3%	100%	100%	Over	na	Reg +/-	6.4
Greece	20-30/06/2016	120	-19%	97%	91%	31/07/2016	+/++	+/++	2.9
Italy	26/07/2016	261	5.9%	100%	100%	na	+	+	3.6
Lebanon	31/06/2016	2.5	na	100%	100%	31/06/2016	na	na	4.9
Morocco	15/05/2016	775	-66%	100%	na	na	na	na	1.2
Portugal	30/06/2016	21	0%	10%	na	15/07/2016	+	-/+	1.6
Spain	31/05/2016	2663.8	+2.4%	nd	na	31/08/2016	+	na	2.8
Tunisia	08/08/2016	258	-33.5%	99%	100%	15/08/2016	+	-	1.3
Turkey	25/05/2016	2.775	na	80%	n/a	31/06/2016	+/-	+/-	2.4

na: non available

Trends - MED-Amin countries

Barley harvest extends between May and August for most countries in the MED-Amin area and is consequently over.

- **Algeria:** According to MARS, pessimistic forecasts are to be expected. On Aug 29, the agricultural Minister announced that cereals harvests as a whole were down 21% as compared to last year's already difficult campaign whose yields averaged 0.84 t/ha (MARS figures) (against 1.09 t/ha for the 5-year average).
- **France:** FranceAgrimer in collaboration with Arvalis recorded a production recoiling at 7.8 mln tons against 10 mln tons in 2015 as well as a poor malt barley quality, on the close of the winter barley harvest. Following the same trend, the spring barley harvest is expected to be at a level of 2.4 mln tons against 3 mln tons – corresponding, all things considered, to better yield than the ones previously expected.
- **Greece:** Climatic conditions in Greece have been normal this year. Occurrences of rain in Central Greece have been monitored during the harvest, but recorded yields are stable or even improved in some regions. In the north, following a mild winter, spring and high temperature favored a good development of crops, but also the development of fungal infections in some regions. A significant reduction of sown areas was recorded (-19%).
- **Italy:** Harvests are expected to be good, and display enlarged sown areas (+6%).
- **Morocco:** The provisional data provided by Morocco indicate strongly recoiling yields (0.5 t/ha against 0.9t/ha for the 5-year average.).
- **Portugal:** In spite of mixed growth conditions (degraded between March and May, improving in June), the data communicated by Portugal in July leave hope for a good quality of the grains harvested.
- **Spain:** The data provided by Spain (May 31) record average to good meteorological conditions during crop growth. Sown areas have been extended a little this year (+2.4%).
- **Tunisia:** According to the initial data provided by Tunisia, harvests have suffered a lot and point towards strongly recoiling final harvest areas (-38% against the 5-year average).
- **Turkey:** Sowing was over by 30% in Turkey in June. Barley sowing in the country extends until September. For the country, MARS forecasts yields that would be a little weaker than the 5-year average (2.59 t/ha) and significantly down from last year's campaign.

Rice

Global trends

From a FAO estimate perspective, it is considered that about 1/3 of the accounted production for the 2015/16 campaign is realized at the end of August.

- **World:** For the largest producers, USDA forecasts so far relatively stable production as compared with last year.

- **China (22% of world production[1]):** At the end of August, it is estimated that China has produced about 33% of the production that will be accounted for in the 2015/16 campaign. USDA forecasts a 146.5 mln tons production against 15.8 mln tons in 2015/16. AMIS gives us the following forecasts: 144.6 mln tons (2016/17) against 143.8 mln tons(2015/16).

- **India (17%):** It is generally considered (FAO, USDA) that the Indian campaign starts in October. At this stage, the harvest accounted as 2016/17 has not begun yet. USDA forecasts a stable production at about 105 mln tons. AMIS: 105.6 mln tons (2016/17) against 103.4 mln tons (2015/16).

- **Indonesia (7%):** 80% of the annual rice production is produced between January and September. USDA forecasts a stable production at about 36.6 mln tons. AMIS, for its part, forecasts a 45.1 mln tons production for 2016/17 against 45.8 mln tons in 2015/16.

- **Bangladesh (5%):** USDA forecasts a stable production for Bangladesh of 35.5 mln tons for 2016/17.

- **Vietnam (5%):** 85% of the annual rice production is produced between January and August . USDA forecasts a stable production at about 28 mln tons. AMIS: 29.8 mln tons (2016/17) against 30 mln tons (2015/16).

The evaluation of crops proposed in August 2016 by GEOGLAM within AMIS Market Monitor points out to relatively favorable conditions for all covered countries. However, crop conditions remain under the "Watch" status for about 2/3 of harvests in China and Thailand and for about 50% of harvest in Vietnam and in the Philippines.

1 2010-14 Average

MED-Amin Area: Planting Progress - Rice

Country	Date of measurement	Estimated area 2016 ('000 ha)	Area Evolution (n/n-1) (%)	Planting progress (%)	Progress at the same date last year (%)	Estimated end of planting	Average yields (2010-14) (t/ha)
France	01/08/2016	14	-1%	0%	0%	na	5
Greece	10-20/05/2016	30	0%	81%	87%	30/05/2016	7.8
Italy	27/07/2016	237	4.5%	80%	70%	31/08/2016	6.5
Portugal	30/06/2016	28	-5%	100%	na	na	5.9
Spain	31/05/2016	109.5	0%	na	na	30/06/2016	7.7
Turkey	25/05/2016	116	na	30%	na	09/2016	8.1

na: non available

Trends - MED-Amin countries

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

- **Egypt:** The main Egyptian rice harvest usually takes place in October. USDA forecasts a stable 4 mln ton production. For AMIS, this production will amount to 4.34 mln tons in 2016/17 against 4.1 in 2015/16.
- **EU:** USDA forecasts a stable production of 2 mln tons (13% realized at the end of August); Italy usually harvests rice during the months of September and October. AMIS: 1.78 mln tons (2016/17) against 1.78 (2015/16).
  - **Greece:** The sown area is recorded to be stable this year at 30.000 ha. Sowing have been delayed a little in the North of Greece, and were over at the beginning of June.
  - **Italy:** Italy expects sown areas to be larger this year (+6%).
  - **Spain:** Sowing was over in June. Spain indicates stable sown areas.
  - **Portugal:** The recorded growth conditions were mixed so far (degraded between March and May, rather good in June). Portugal records a small reduction of sown areas (-5%)
- **Turkey:** The rice harvest in Turkey is usually realized in the month of September and October. AMIS forecasts a stable 0.55 mln tons production in 2016/17.

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