



CIHEAM

International Center for Advanced
Mediterranean Agronomic Studies

MED-Amin Harvest & Planting Progress

November 2019



www.med-amin.org



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 !



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Newsletter

The MED-Amin newsletter is provided on a bi-monthly basis and is available directly from the MED-Amin website.

Summary

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

For each monitored crop (wheat, barley, maize and rice), this information is preceded by a report of the world market and harvest outlook of the main producing countries. Figures are based on information provided by monitoring and analysis organizations, mainly the International Grains Council - IGC (checked early November at <https://www.igc.int/en/markets/marketinfo-sd.aspx>, the *Grain Market Report* of 24 October), the USDA (*WASDE report* of 8 November, the *Crop Progress report* of 12 November, the *Rice Outlook* and Wheat Outlook of 13 November), FAO-AMIS (the *Market Monitor* of November and the *GEOGLAM Crop Monitor* of 7 November and <https://app.amis-outlook.org/#/market-database/view-and-compare>), the European Commission - DG AGRI (Cereal Market Situation of 31 October, the JRC *MARS Bulletin* of 28 October and 25 November, the JRC *MARS Bulletin for Turkey* of 12 September and <https://agridata.ec.europa.eu/extensions/DashboardCereals/CerealsProduction.html> updated on 31 October).

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Legend:

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

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

Wheat

World Trends

The following are the general trends for wheat, with organizations such as AMIS and USDA not distinguishing between wheat and durum wheat. The wheat supply is expected to return to an average level after the previous difficult season. Indeed, the main estimates indicate a global production exceeding 760 Mt. The IGC/DG Agri projections count on 762 Mt (24 October), the USDA on 766 Mt (8 November) and AMIS on 765 Mt (7 November), much better than last year (estimated between 730 and 733 Mt). Summer estimates were confirmed despite fluctuations due to contrasting conditions in the EU, Russia, Australia and Argentina (see below). In particular, the IGC estimates world durum wheat production down to 36 Mt (a minimum over the last 5 years), particularly in the EU (-10%) and Canada (-13%). For the next campaign 2019-2020, the first estimates of global wheat production are expected in early 2020.

EU (21 % of world production¹) : According to AMIS Crop Monitor in August, wheat crop conditions during the 2018-2019 crop year were generally favorable over a large part of Europe despite the particularly severe drought and heat in southwestern Europe. The latest production estimates from the EU have been revised slightly upward, to DG AGRI's October figure of 156 Mt, of which 148 Mt is for soft wheat and 8 Mt is for durum wheat (ie +5 Mt vs estimate in August, mostly gained in soft wheat), 153 Mt for USDA and 154 Mt for the IGC. The increase in production enabled by improved yields (between + 1 and + 4% vs. the five-year average - M5Y - depending on the country and the type of wheat according to the last MARS Bulletin) compared to last year (137 Mt) is over 10%. With regard to the 2019-2020 season, dry conditions hampered the planting of winter crops in northern France, Germany, north-eastern Slovenia, Romania, Bulgaria, Hungary and Spain, as well as in western Ukraine. The sowing window for winter cereals is still open, but it will hope more rain in most of these areas to support soil operations and adequate crop development.

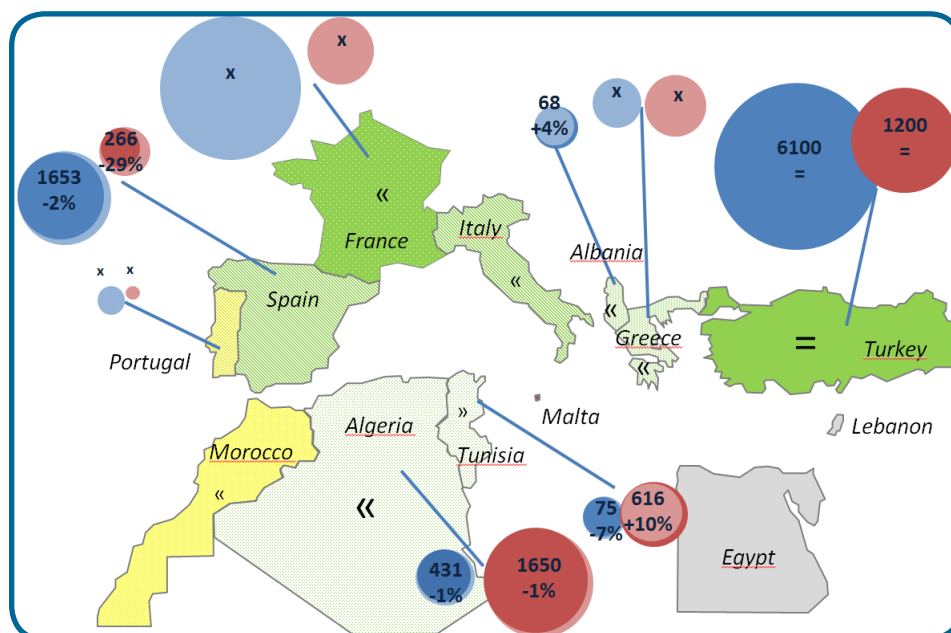
China (17 %) : Production in 2019 is estimated at 132 Mt (IGC, USDA), a stable level for the last six years. The 2019/2020 winter wheat season is experiencing favorable conditions, with above-average rainfall, which has favored crop emergence and early development.

India (13 %) : Production in 2019 is estimated at 102 Mt (IGC, USDA), + 2% vs 2018. Planting for the new season has started in the north of the country under good conditions.

USA (8 %) : Heavy late season rains, including snow, and freezing temperatures in the northern lowlands, halted harvest in a number of other spring wheat and durum wheat producing states. This has accentuated the already accumulated delay and necessitated a downward revision of the estimates previously made. The USDA, like the IGC, estimates the 2019 harvest at 52 Mt (including 35 Mt in winter wheat and 1.6 Mt in durum wheat), a level equal to the previous season 2017/18 and much better than the bad harvest in 2017 (47 Mt). As of November 10, 92% of the acreage expected in 2020 have been planted according to the Crop Progress report. Wheats are growing well, except in the state of Texas where dry conditions prevail.

Russia (8 %) : Despite delicate end-of-season conditions, including areas that are too dry and others that are too wet at harvest time, production has increased in 2019 (between 75 and 78 Mt according to IKAR and Russian Ministry of Agriculture). In their latest revisions, the IGC and USDA estimate Russian production at 74 Mt, up slightly vs M/M and last year. Exports from the world's largest exporter are forecast to remain at 36 Mt, according to the same ministry, up slightly from 2018/19. However, UkrAgroConsult reports a 9% decline in exports over the July-September period compared to 2018. For winter wheat 2020's harvest, conditions are favorable for planting and emergence, with an expected increase in planted area vs 2019.

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



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MED-Amin : Harvest Progress - Wheat

MED-Amin Trends

- **Albania** : The 2019 production is slightly down this year, estimated at 250,000 tonnes by the Ministry of Agriculture. The next crop planting is performed at 10% (from 67,700 hectares expected, + 4% vs. 2018), it is realized in good conditions and the current outlook follows the average trend (including in yield).
- **Algeria** : The 2019 production was significant around 4 Mt of common wheat and durum combined, which significantly reduced the country's imports in this commercial year 2019/20 (estimated at 7 Mt by USDA), one of the world's leading importers of wheat. Winter wheat planting pace is behind normal and 2018, due to the absence of rains, particularly in the West region. The expected return of rains from week 45 should improve the situation. The authorities anticipate the following areas planted for the 2019/2020 season: 1 650 000 ha in durum wheat (-0.6% vs 2018/19 season) and 431,000 ha in common wheat (-1.3% vs 2018/19).
- **Egypt** : The 2019 harvest has been normal (mainly irrigated crop), around 8.8 Mt according to the IGC, while AMIS predicts 9.2 Mt. Imports of the world's largest wheat importer are expected to remain high around 12.5 Mt according to USDA.
- **France** : The 2019 harvest of wheat was very good, both in quality and quantity (FranceAgriMer and Institut Arvalis) and the forecasts of the MED-Amin Bulletin of August were confirmed until the end of the harvest (39.5 Mt of soft wheat and 1.5 Mt of durum wheat). The 2019 planting of soft wheat are about a week behind the M5Y (67% of soft wheat is planted on 04/11/19 compared to 85% last year at the same period) because of dry conditions at the end of September when the seedlings hatched, and then, at contrary, of the too wet periods that slowed down the normal progress of the sowing operations in October. This observation is identical for durum wheat, with 17% of the area sown on 04/11/19 against 27% in 2018 at the same time.
- **Greece** : The 2019 production was good (1.1 Mt of which 70% of durum wheat). For the next season, and according to local experts, the significant lack of rainfall in September and October has delayed planting, as fields cannot be prepared accordingly. Only 5 to 10% of soft wheat and durum wheat were planted compared to 17-19% last year at the same time. In Western Macedonia, a reduction in the area planted is expected, due to the participation of several farms in the organic farming program. The price of compensation for cereals is much lower than that of pulses and farmers are turning more towards the last.
- **Italy** : Harvest 2019: 2.7 Mt of soft wheat and 4 Mt of durum (DG Agri). Planting is proceeding at a normal pace, well in the southern regions and with complications in northern with generally too-wet conditions.
- **Lebanon** : No data available.
- **Morocco** : After a poor 2018/19 campaign that saw a serious wheat production decline and imports rebound (estimated at 4.8 Mt according to USDA, + 17% vs. the previous year and + 11% vs. M5Y), the 2019/20 cereal season is experiencing an unfavorable development due to the notable deficit of precipitation that has been accumulated in 2019. Despite some beneficial rains in some regions including that of Fez-Meknes, the water deficit is still significant and has delayed tillage and sowing.
- **Portugal** : The 2019 production was made difficult by extreme dry conditions, reaching 63 thousand tons, -8% vs 2018 (Min. Agriculture). In Alentejo, the main soft wheat producing region, precipitation during October was 36% below normal. Late October precipitation favored normal soil preparation for seedbeds. Planting starts in November. Mild temperatures will allow the sowing window to be extended until December.
- **Spain** : The 2019 production was poor as announced in the previous MED-Amin Bulletin. The harvest was 5 Mt in soft wheat and 0.7 Mt in durum wheat, well below record levels of 2018 (MAPA). The sowing takes place in good conditions. The authorities are expecting 1.65 million hectares of wheat (-2% vs 2018) and 0.27 Mha of durum wheat (-29% vs 2018).
- **Tunisia** : The 2019 harvest was close to 1 Mt. The sowing conditions of winter wheat are good. Planting is just starting in the Monastir governorate for soft wheat (74.8 thousand hectares forecast in total this year, -7% vs 2018) and is ahead for durum wheat compared to last year (0.7% progress on the total expected area of 616.2 thousand hectares, a significant increase of 10% vs. 2018).
- **Turkey** : The 2019 harvest is average, around 19 Mt (AMIS, IGC), with yields of 3t/ha, well above those of 2018 and M5Y (see MARS Bulletin of September for Turkey). Planting of winter wheat is now complete (end of October), on a similar area to previous years (6.1 Mha in soft wheat and 1.2 Mha in durum wheat). The plants are growing normally, thanks to favorable conditions according to the authorities.

Legend:

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

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

■ Progress of Planting in 2019 (Week 44) : over (plein colour) / in progress (colour proportional to the progress).

= / << / >> : Progress stable / delayed / in advance vs 2018

Maize/Corn

World Trends

In the northern hemisphere, harvests continue under mixed conditions in Europe and North America, and under favorable conditions in China, India and Russia (AMIS Crop monitor). In the southern hemisphere, planting of the spring crop continues under favorable conditions in Argentina and Brazil. Production forecasts for 2019 have been lowered after a downward revision in Mexico, but world production is expected to reach its second highest level ever recorded: 1122 Mt according to AMIS, 1102 Mt according to USDA and 1098 Mt according to the IGC (AMIS Market monitor). The utilizations in 2019/20 remain stable, food use increasing while the demand for feed falls particularly in the US. Trade in 2019/20 (July / June) was slightly revised upwards, while confirming a contraction of 1.5% compared to the previous year's record trade volume. Lastly, stocks (ending in 2020) are expected to fall more significantly than expected earlier, down 1.8% vs. M/M estimation, mainly due to a reduction in US ending stocks.

● **USA** (35 % of world production¹): Conditions are generally favorable except in the east of the Corn Belt (AMIS Crop monitor). The harvest is underway but well below the normal pace for this time of the year due to the very late start of the campaign. Concern is growing for fields that have yet to be harvested while winter has already done damage (frost, snow, sudden temperature changes). 1/10 of surfaces are under threat according to AMIS Crop Monitor of November. According to the USDA, production is still expected to reach 347 Mt, despite several downward revisions and analyses from many experts, falling for the second year in a row. The IGC estimates the harvest at 341 Mt while production was 366 Mt in 2018. The latest USDA Crop Progress report estimates that as of 10 November, 66% of acreage was harvested compared to 85% on M5Y which confirms the significant backlog accumulated in the course of the campaign.

● **China** (22 %) : Conditions are favorable while the harvest ends for summer crops. The USDA estimates the 2019/20 crop year harvest at 254 Mt (3 Mt more than in 2018), the IGC at 255 Mt.

● **Brazil** (8 %) : The area cultivated in high season is estimated at 4.1 million hectares (+ 1% Y/Y) and the yield at 6.3 t/ha (+ 1.5%). The surface of *safrinha* (2nd harvest) is maintained at the level of 2018/19 (12.9 million hectares) until February. However, a yield slightly below 5.5 t/ha is tentatively forecasted. CONAB maintains its total production forecast at 98 Mt (against 81 Mt in 2017/18 campaign), USDA and the IGC at 101 Mt.

● **EU** (7 %) : The harvest is almost complete. Heavy and frequent rainfall prevented harvesting in the British Isles, parts of the Benelux countries, northern Germany, Denmark and southern Sweden. The drought has had a negative impact on yields in Romania, the top EU producer (16 Mt according to DG Agri). The EU-28 production is estimated at 66 Mt according to the IGC, an equivalent amount for USDA, slightly higher than previous years, already good, thanks to abundant production in Hungary and in Bulgaria in particular. The MARS Bulletin of October estimated average yield of 7.6 t/ha slightly below annual and five-year averages.

● **Argentina** (3 %) : Corn planting for the 2019/20 crop has been achieved at 35% (total area is estimated at 6.4 million hectares, i.e. + 1.5% vs 2018) according to BAGE on 24 October. Crop conditions are mixed with drought in the west during the key development phases reducing expected yields, while good soil moisture conditions in the east have resulted in exceptionally high yields according to the AMIS Crop Monitor of November. AMIS forecasts a 2019 harvest at a historical level of 57 Mt, while the IGC forecasts a 4 Mt decrease versus 2018 at 53 Mt. USDA: 50 Mt.

¹ : Mean 2013-2015 (from AMIS)

MED-Amin: Planting Progress - Maize

MED-Amin Trends

- **Albania** : The harvest is 90% completed at the end of October, as in 2018, with a stable total area of 54.5 thousand hectares. According to the national authorities (MARD), the expected production this year is 381.4 thousand tons (+ 1% vs 2018). This campaign had good climatic conditions, optimal during critical development phases (planting, maturity until harvest).
- **Egypt** : Harvests usually take place in October-November. USDA estimates production at 6.4 Mt equivalent to 2018 and 2017, AMIS at 7.4 Mt.
- **France** : With good crop conditions in Spring, planting and corn emergence went well in France. The following stages of development have been delayed because of hot and very dry conditions experienced by the whole country. Successive heatwaves in July coupled with early water restrictions at the time of corn bloom impacted the crops. The end of the cycle took place in a climate close to normal but variable according to the regions: the conditions of general crops have nevertheless deteriorated slightly (60% classified as "good" to "very good" in early August and only 57% as of 4 November 2019 according to Cere'Obs and Agreste). From the FranceAgriMer's forecast 3 months ago, the estimate of yields (8.7 t/ha) and production (13.4 Mt) at the beginning of August has been revised downwards to 8.6 t/ha and 12.5 Mt. Harvested areas are + 6% vs 2018, estimated at 1.4 Mha. The decline in grain maize production can also be explained by the use of part of the maize as green maize to offset the poor production of fodder this year in France. The (too) late rains this autumn slowed down the harvest (harvests were 79% completed on November 4th compared to 98% last year, the median harvest dates were 8 days behind M5Y).
- **Greece** : The country experienced very good weather throughout the season, allowing yields in the five-year average (10.4 t/ha according to MARS). The area increased by 4% vs. 2018 and the harvest is estimated at 1.6 Mt by the Ministry of Agriculture, 1.2 Mt by DG Agri.
- **Italy** : The harvest in northern Italy was completed without significant constraint. Predictions following a deficit of biomass accumulation during a good part of the vegetative cycle are maintained, with an average yield of 9 t/ha (significantly lower than the five-year average and 2018) and an estimated production at 6.4 Mt by DG AGRI at 31 October.
- **Portugal** : Portuguese maize production is mainly irrigated (92%). The harvest is 80% over of the 83,000 hectares in total, slightly ahead of the 2018 pace. Mild temperatures in July and August. The estimated production around 7.1 million quintals only according to the Ministry of Agriculture (-10% vs M5Y) with good quality.
- **Spain** : Harvesting conditions were favorable for summer crops and the grain maize crop has just ended, on an area of 359 thousand hectares (+ 11% vs 2018). Yield remained close to average despite dry conditions (mainly irrigated). Production is estimated at 4.1 Mt from the Ministry of Agriculture.
- **Turkey** : The harvest ended in late October on more than 595,000 hectares according to the Turkish authorities. Crop conditions were favorable during the season The MARS Bulletin of November predicts good level of yield (9.7 t/ha), above the five-year average (+ 3%). Production is estimated at 6 Mt by the Turkish Ministry and AMIS, 6.2 Mt by the IGC, stable production compared to previous years.

See the representation on harvest progress, harvested areas and crop conditions for Maize in the MED-Amin countries on Page 9

Barley

World Trends

The 2019 winter barley and spring barley crop experienced generally favorable conditions in the major producing countries. World production is expected to reach 155 Mt (the largest since 2008/09), up 10% from 141 Mt in 2018, while global consumption also increases (from 142 Mt to 150 Mt) boosted by demand for animal feed. World stocks are expected to grow after the contraction in 2018/19. As with wheat, current barley planting and crop conditions for the 2020 crop are favorable. Vigilance prevails for Australia, Ukraine, Russia and Canada among the major producers.

EU (41 % of world production¹) : The IGC estimates the 2019 production at 65 Mt, a historical level. The 2019 plantings are underway across Europe. Persistent drought in the Atlantic and Baltic regions has delayed the usual planting season affecting several of the main producing countries of the EU. The MARS Bulletin of November reported generally good planting and development conditions in France and Poland, but frequent and abundant rainfall delayed planting in the United Kingdom and northern Germany. On the other hand, dry topsoil conditions hampered planting and emergence in Romania, Bulgaria and Hungary. The sowing campaign can be completed in good time if better conditions prevail in the coming weeks.

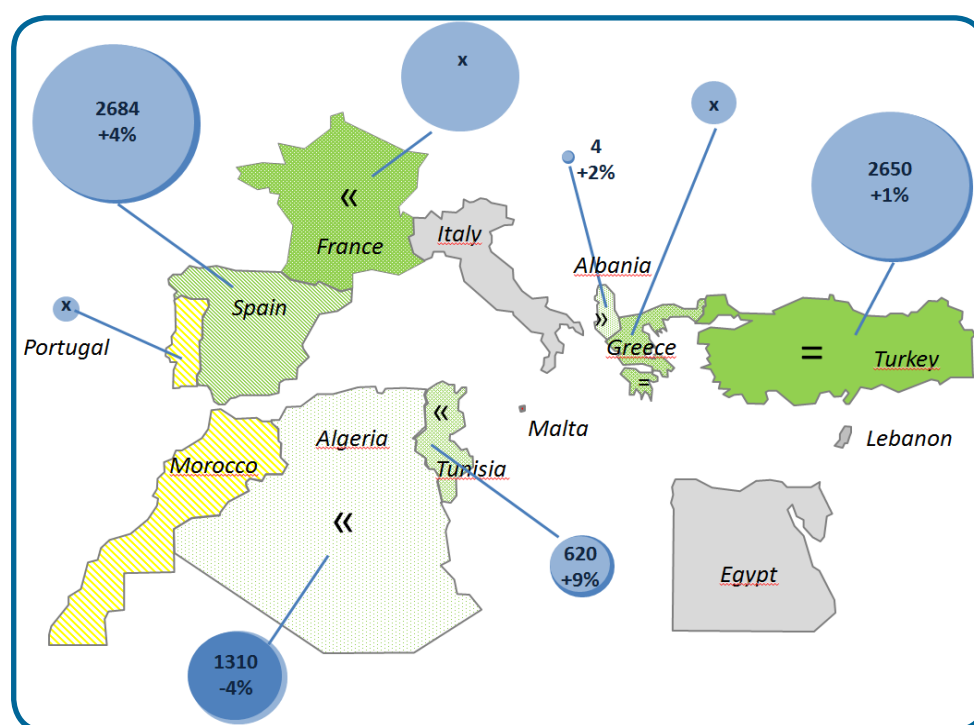
Russia (11 %) : According to UkrAgroConsult, the 2019 harvest of barley was over 20 Mt, thanks to higher yields than last year and despite persistently dry conditions at the end of the season. As with wheat, exports are still behind in September and should accelerate in the coming months. The winter planting campaign is well advanced despite a slight delay in the pace, and should extend until the end of November.

Canada (6 %) : The campaign went very well. Production in 2019 is estimated at 10 Mt (+ 19% vs 2018), confirming the forecast in July of the AAFC, and exports are expected to stabilize around 3 Mt. The IGC predicts 12 Mt. Planting has started. The great variability of temperatures and the first winter influences with snowfalls in the plains should have disrupted these operations and the development of the plants.

Ukraine (6 %) : The 2019 harvest is slightly reduced to 9 Mt (+ 21% Y/Y) according to the Ukrainian Statistics Department and the Ministry of Agriculture, in view of the pre-harvest drought and the overall conditions favorable during the campaign. Seedlings were delayed by dry conditions in the western and northern parts of the country, preventing proper plant development (MARS Bulletin of November). In the south and east of the country, rains in early October have improved conditions.

Australia (6 %) : The harvest was once again hampered this year following the exceptionally dry and warm conditions throughout the season, particularly in most of New South Wales and Queensland, influenced by sustainable El Niño. Barley production is not expected to reach more than 8 Mt (-21% vs 2018) according to Rabobank.

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



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MED-Amin: Harvest progress - Barley

MED-Amin Trends

- **Albania** : The 2019 production reached 9.95 thousand tons. The planted area is expected to increase from 2018 (3.5 thousand hectares, +2% vs 2018). Seedlings are performed at 6%, slightly ahead of last year, benefiting from favorable conditions.
- **Algeria** : The 2018/2019 season ended with an abundant harvest (1.9 Mt). Planting of winter barley is carried out on 5% of the estimated total barley area estimated at around 1.3 million hectares by the Ministry of Agriculture, slightly down compared to 2018 (-4%). As for wheat, planting is lagging behind normal and the year 2018. This follows the absence of rains, particularly in the western region, but the return of rains expected from week 45 should improve the situation.
- **Egypt** : The IGC estimates 2019 production at 0.2 Mt, stable compared to previous years.
- **France** : The 2019 production amounted to 13.6 Mt, a record quantity. The planting started late due to dry conditions at the end of September. At the beginning of October the improvement of the conditions allowed a partial catching up of this delay. Thus, As of 4 November, planting was 81% completed compared to 90% last year at the same time, a 9-day delay against M5Y according to CéréObs and Agreste of the Ministry of Agriculture.
- **Greece** : The 2019 production amounted to 0.34 Mt, a stable level. The significant lack of rainfall in September and October delayed the planting of winter barley. Between 10% and 20% of planting was achieved compared to 16% last year at the same time. The conditions are not optimal for the moment.
- **Italy** : The production in 2019 has slightly exceeded 1 Mt, stable in recent years (DG Agri). Missing information on planting and crop conditions at Fall.
- **Lebanon**: No data available.
- **Morocco** : After the poor harvest in 2019, the 2019/20 cereal season is experiencing an unfavorable development due to the notable deficit of precipitation which has been accumulated in 2019.
- **Portugal** : The 2019 production reached 54 thousand tons. In Alentejo, the main grain producing region, October was dry, with precipitation 36% below normal. However, as for wheat, soil preparation went well and new crop planting will start in December. Vigilance still prevails.
- **Spain** : The country had a difficult 2018/2019 cereal campaign because of the drought that affected several regions of the country. Production amounted to 7.4 Mt, down more than 19% vs 2018. The 2019 planting started and the total expected area is 2.68 million hectares (+ 4% vs 2018) according to the Minister of Agriculture. Some regions are still suffering from drought while winter is here.
- **Tunisia** : The 2018/2019 season ended with an abundant harvest (3.3 Mq). The campaign that starts is experiencing favorable conditions despite a delay in the work of soil and planting. As of 4 November, the progress of planting is 7% (13% in 2018 at the same time). The total expected area is estimated at 620 thousand hectares, an increase of 9% compared to 2018.
- **Turkey** (5% of world production¹): The 2019 harvest amounted to 5.9 Mt according to the IGC, a minimum in recent years due to a decrease in harvested area. For this new season, the winter barley planting was completed at the end of October and the plants are growing in good conditions. The expected total barley area is 2.65 million hectares according to the authorities, a stable figure compared to 2018.

Legend:

- / ● : Planted areas of **Barley** in 2019 (value) / in 2018, and evolution x%. Size proportional to the area value.
- Crop conditions favorable or exceptional / of concern / poor. ■ Missing information.
- Progress of Planting in 2019 (Week 44) : over (plein colour) / in progress (colour proportional to the progress).
- = / « / » : Progress stable / delayed / in advance vs 2018

Rice

World trends

World production is estimated at 513 Mt by AMIS, 500 Mt by IGC and 498 Mt by USDA. It has barely changed, with recent improved prospects in Bangladesh, India and Vietnam being offset by downward adjustments in Indonesia, Japan and Thailand (AMIS, Market monitor). China and India are expected to record the largest declines in production in 2019/20, China's output is expected to fall by 2.5 Mt and India's by 1.4 Mt (USDA, Rice Outlook of 13 November). Harvested area is estimated to be reduced in these two countries, the world's two largest rice producing countries, accounting for more than half of world rice production. In China and India, the harvest begins for late season rice and Kharif rice, respectively. In Southeast Asia, conditions are mixed for rainy season rice in the northern region, due to poor weather conditions in Thailand and the Philippines. Conditions for dry season rice are favorable in Indonesia according to GEOGLAM's AMIS Crop monitor. According to the same report, about ¼ of the current rice crops are "to watch".

Other market data indicate reduced 2019/20 utilizations, following less anticipated non-food uses in the Far East. Trade in 2020 has increased slightly, largely as a result of more dynamic EU import demand. Stocks (at the end of 2019/20) have increased again and are now only 1.2% of their all-time record according to AMIS.

- **China** (29 % of world production¹) : Crop conditions are favorable while the late rice harvest is starting. The USDA and IGC estimate the production at 146 Mt slightly lower than in previous years (reduced yield and acreage towards more soybeans). AMIS forecasts 143 Mt, a minimum in 6 years.

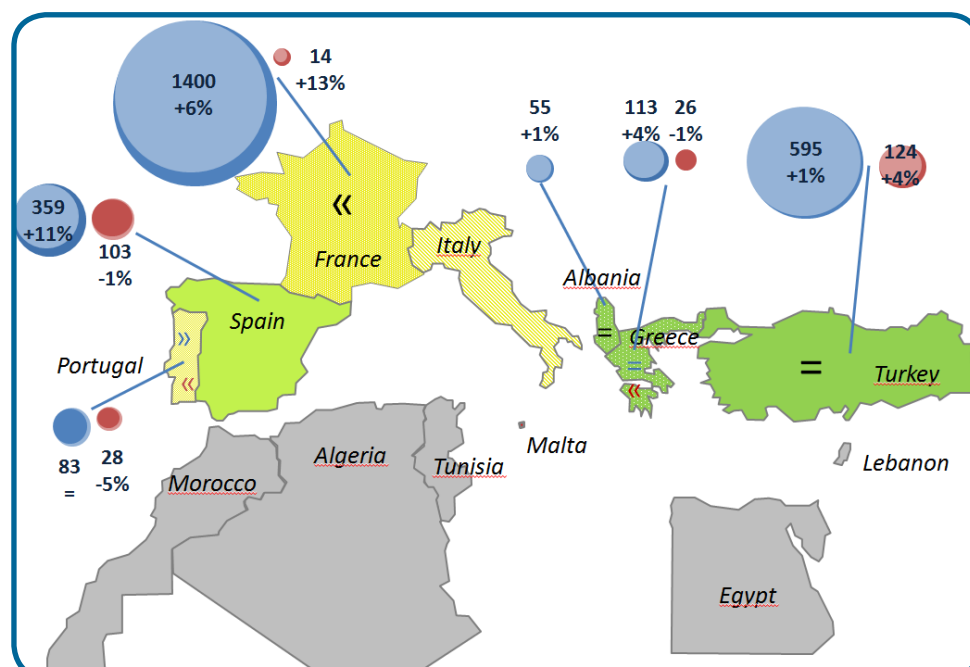
- **India** (21 %) : Conditions are favorable as harvesting begins in the northern states for Kharif rice, which benefited from above-average monsoon rainfall. The USDA and IGC estimate the production around 115 Mt equivalent to previous years, 116 Mt for AMIS.

- **Indonesia** (9 %) : Conditions are generally favorable for the fourth month of dry season rice harvest, with yields slightly lower than last year due to drought. Planting wet season rice starts being delayed because of water shortages. Production is forecasted to decrease slightly according to USDA, which estimates at 36 Mt. The IGC and AMIS, however, expect a slight increase (38 Mt and 47 Mt respectively).

- **Vietnam** (9 %) : The summer-autumn rice harvest (wet season rice) started in the north in contrasting conditions due to reduced rainfall which reduced the total acreage and is expected to reduce final yields. In the south, the crop is growing under generally favorable conditions with a minor reduction in yields compared to last year. Projections are for a stable production around 28-29 Mt (USDA, IGC, AMIS).

- **Thailand** (6 %) : Crop conditions for wet season rice are mixed due to dry early development, followed by heavy rains and flooding in August and September. Projections, however, predict stable production around 20-21 Mt (USDA, IGC, AMIS).

Harvest progress, areas and crop conditions of Maize and Rice in the MED-Amin countries



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MED-Amin: Planting Progress - Rice

MED-Amin trends

- **Egypt** : The country is expected to record the largest increase in production in 2019/20, with production up by 1.5 Mt due to a substantial expansion of cropland following a relaxation of constraints imposed by the government according to USDA (Rice Outlook). The IGC and USDA estimate production at 4.3 Mt and AMIS at 3.5 Mt.
- **France** : The Authorities indicate that a delay in rice harvest by around 15 days this year. It only started in the early days of October (Agreste) and reached a 90% progress on 4 November. Area harvested increased by 13% vs. 2018 (14,100 ha). The harvest is estimated at 82 thousand tons according to FranceAgriMer despite diminished yields (MARS).
- **Greece** : As for maize, rice cultivation has benefited from very good agro-meteorological conditions. In early November, the harvest is over 90-95% of the surface area (26.4 thousand hectares, -1% vs 2018), slightly behind the previous year according to the Ministry of Agriculture. Production is estimated at 230 thousand tons (above average yields).
- **Italy** : Despite initial concerns about planting and early development, as described in the MARS Bulletin of June, the 2019 rice season in Italy is on average, both in terms of phenological response and biomass accumulation. Yields of 6.6 t/ha are in line with M5Y (MARS Bulletin of October).
- **Portugal** : The mild temperatures and not enough sunshine in July and August have revised down the harvest, behind 2018's. At the end of October, it is only carried out on 50% of the total areas to be harvested (27,900 ha, -5% vs 2018), while 70% were at the same period in 2018. Production is estimated at 153 thousand tons according to the Ministry of Agriculture (-11% vs. 5-year average). Most of the rice produced in Portugal is *Japonica* variety (92.5%).
- **Spain** : According to the MARS Bulletin of October, ripening progressed well in the rice growing areas of northern and eastern Spain and started in early September in southern Andalusia and Extremadura. In all these areas, the crops were in good condition. Although hot, dry conditions have resulted in high demand of water, the irrigation water for rice crops has generally been sufficient this year. Rice grown in the Caceres region (west-central Spain) may have more heterogeneous yields and a diminished production area. The outlook for Spain is above average over 5 years, but below last year's level. The national harvested area stands at 103 thousand hectares (-1% vs 2018) and the harvest is estimated at 831 thousand tons according to the Ministry of Agriculture.
- **Turkey** : The harvest ended at the end of October on an area of 124 thousand hectares, +4% vs 2018. The authorities forecast an important production of 975 thousand tons thanks to good crop conditions throughout the campaign. AMIS and the IGC predict a stable production close to 600 thousand tons.

Legend:

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



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

Progress of Harvest in 2019 (Week 44) : over (plein colour) / in progress (colour proportional to the progress).

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