MED-Amin Bulletin 2020 –1 (Outlook at 31 March 2020)

May 2020

Winter crops are generally under favourable conditions despite some local harsh situations in France and Italy;

Compromised harvest in western Maghreb.

The present bulletin is a **general outlook on the cereal harvest in the Mediterranean region** . It provides early qualitative forecasting of the 2020 harvest on three cereals crops: **Soft wheat, durum wheat and barley**. The first bulletin provides an assessment of the situation **at the end of March** will be followed by a second assessment of the situation at the end of April and published in June.

This initiative was progressively **developed since 2016** by the MED-Amin network, using a general approach similar to the one implemented by GEOGLAM for the Agricultural Market Information System (AMIS). The MED-Amin network, gathering 13 countries of the Mediterranean region and coordinated by the CIHEAM, aims to support decision-makers in cost-effective management of the cereal markets in the region. This initiative lays the **foundation for an early warning system** towards food security issues in the region. [1]

[1] For more info: www.med-amin.org, http://ec.europa.eu/jrc/en/mars and http://cropmonitor.org

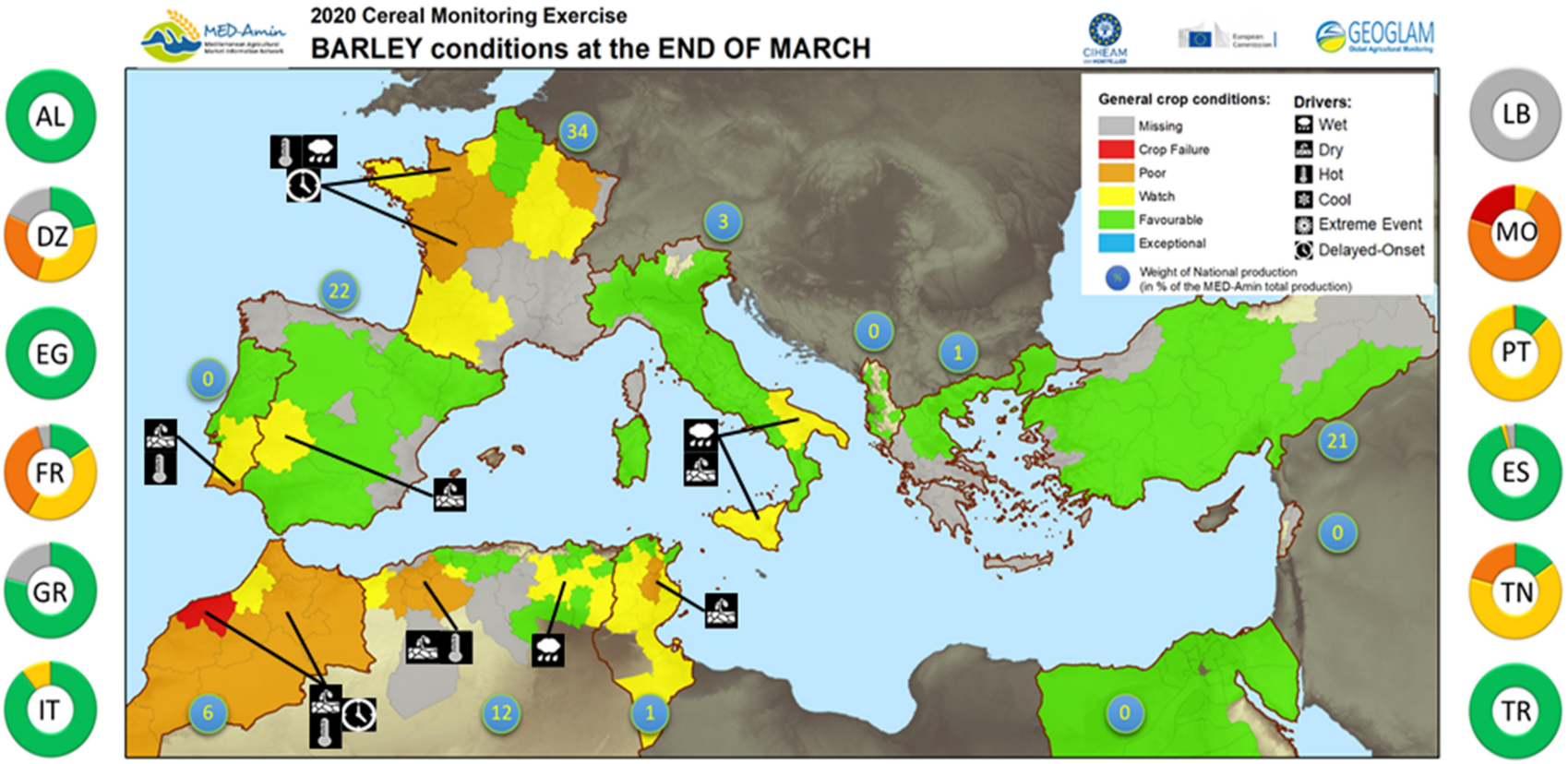
Regional outlook summary

At the end of March 2020, the general regional outlook for the incoming winter **crop harvest in Euro-Mediterranean regions is good and close to average conditions**. Despite some delayed onset of winter crops due to a rainier than usual Autumn and Winter, plant development was sustained by warm temperatures combined within adequate soil moisture in February and March. This mild winter was one of the warmest on records for most of the Euro-med regions. Rainfalls in March stopped long-lasting dry conditions in some of the regions. The North of the Mediterranean basin was in general well supplied in rains so far – at the exception of northern **France** of concern for soft wheat and barley production, and southern **Italy** for durum wheat.

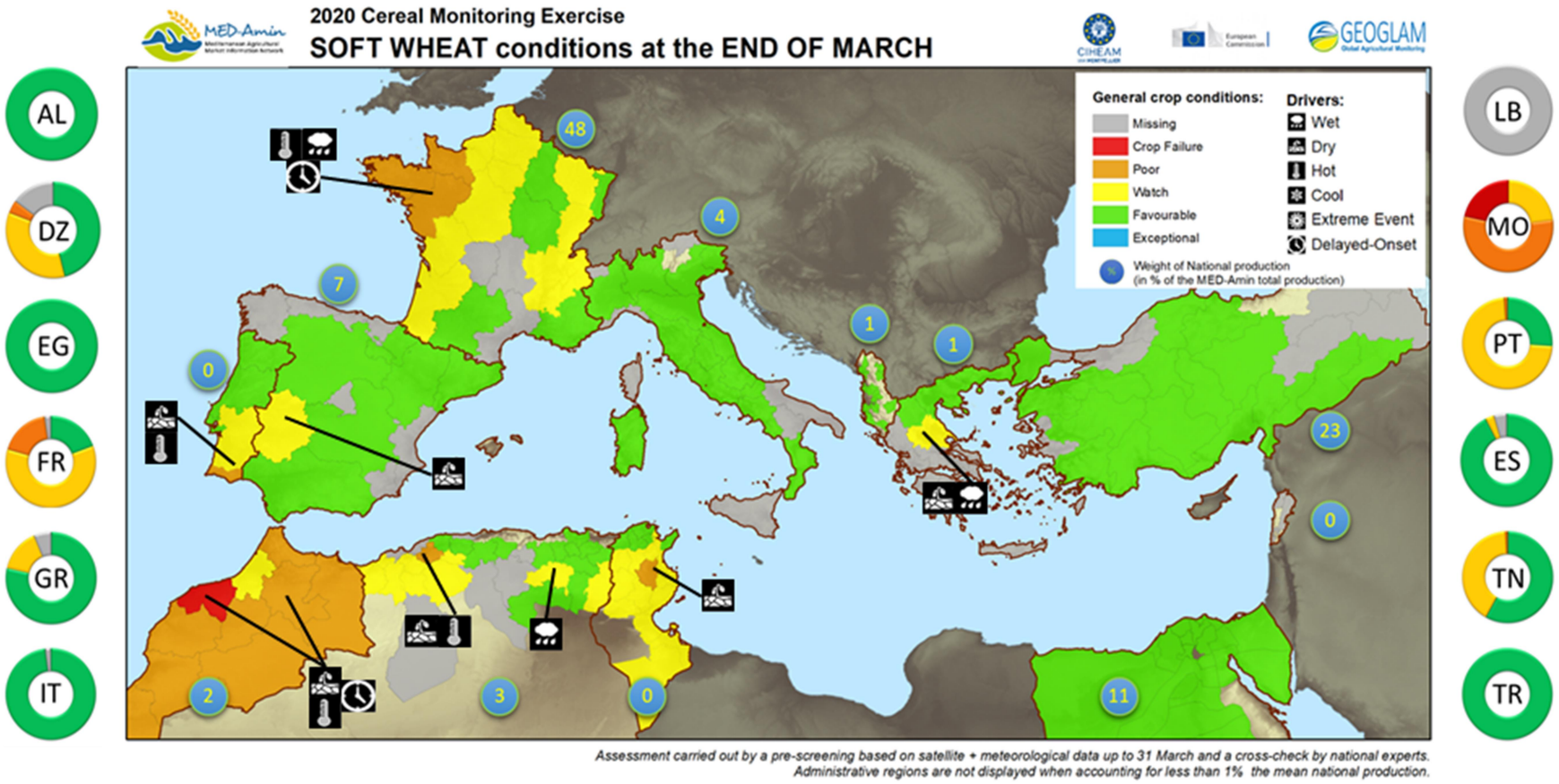
This is not the case on the Southern rim, where cereal crops are heavily affected by a severe drought in **Morocco**, with, after the difficult 2018-19 campaign, a production of wheat and barley already compromised for half of the planted area. In **Algeria** and **Tunisia**, mixed conditions limited damages and the output could be even above-average in some regions. Here, barley crops are the first impacted by drought. **Egypt**, **Lebanon** and **Turkey** are so far in-line-with an average season.

BARLEY **is the most affected by adverse crop conditions** at regional level. In North Africa, it is more hampered since its average crop calendar is advanced in comparison to wheat. Moreover it is mostly rainfed and often cultivated on arid soils. In European countries, barley was more affected by lasting wet conditions on already fragile plants harshly implanted in Autumn.

For instance, In France that counts for 34% of the MED-Amin barley supply (based on the 5-Y average), several western and northern regions are in 'Poor' crop conditions, which nearly correspond to 1/3 of the French supply (see pie chart on the left side of the map below and the crop conditions legend at the end of the document).

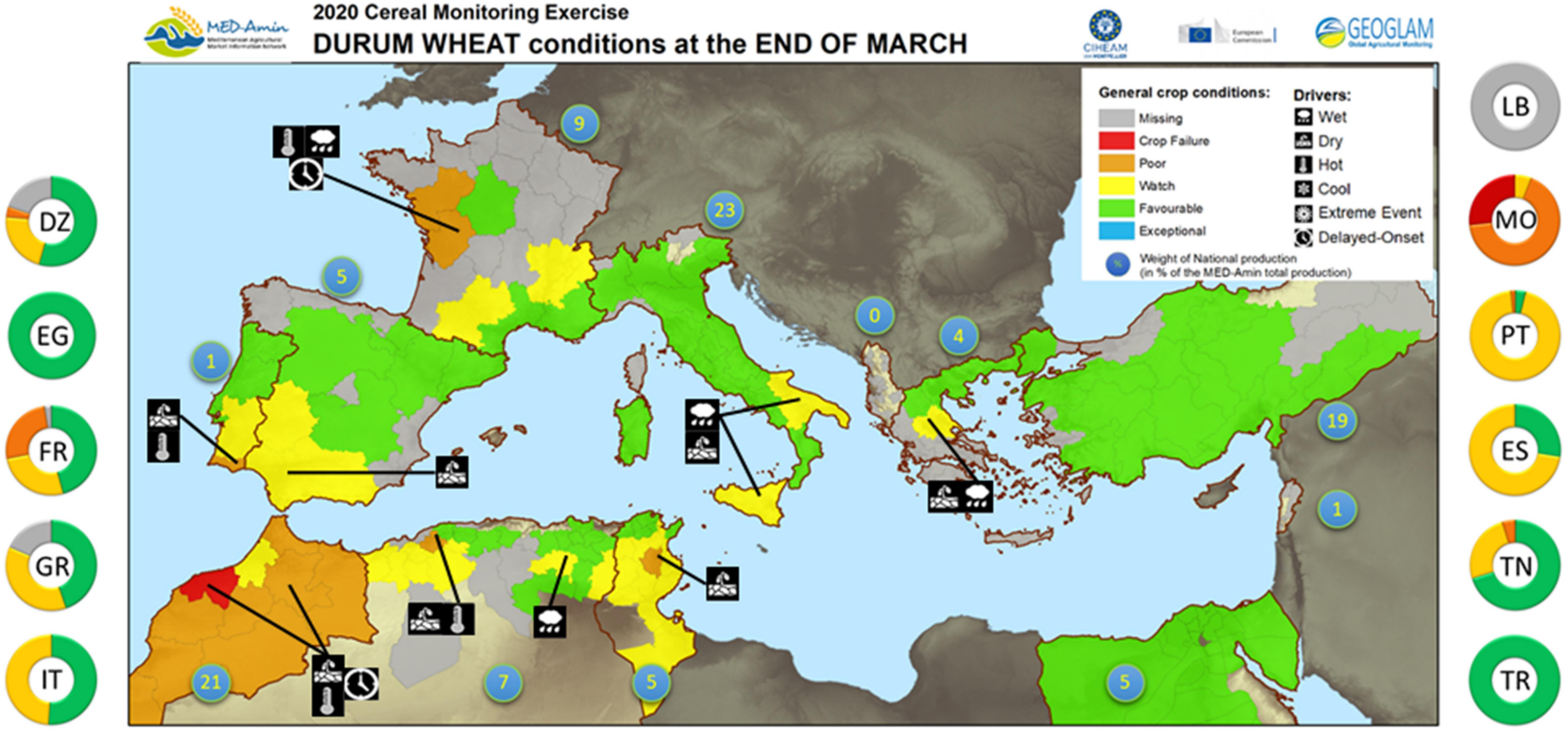


SOFT WHEAT **supply is better preserved since the beginning of the campaign**. Harvest outlook is good in general in most of the productive regions of e.g. France, Turkey and Egypt. For instance, all the soft wheat from Turkey (whose production accounts for 23% the MED-Amin production) is still considered under favourable conditions at March 31st (see pie chart on the right side of the map beside and the crop conditions legend at the end of the document).



DURUM WHEAT is a typical Mediterranean production (47% World production), and this crop is developing under mixed conditions so far.

In Italy, for instance, which accounts for 23% the MED-Amin total, durum wheat supply is in 'Watch' in the Southern regions (50% the Italian production), as it was affected by wetter, then drier conditions than usual (see pie chart on the left side of the map and the crop conditions legend). This crop is still however capable to recover according to meteorological conditions in April. In Morocco, accounting for 21% the production in the MED-Amin area, more than 1/4 of the durum wheat planted area has already been lost[2] ('Crop failure'), in particular in the region of Casablanca-Settat which is the most productive in Morocco. A large part of the country remains under 'Poor' conditions.



[2] Source: Department of Agriculture, "the forecast cereal production of the current season is 30 million quintals from 4.3 million Ha planted, of which 2 million Ha rainfed are completely lost. Part of it has been converted into animal fodder in certain areas."(National Focal Point feedback, article on *Aujourd'hui Maroc, 30 avril 2020*).

National highlights

Albania: crop development follows general trend, despite local mixed either dry or wet and hot events throughout the campaign. The expected average yield of the country is in line with the 5-year average.

Algeria: following the delay in planting in most of the heavily watered regions, drought took place since January in the west of the country and disrupted the vegetative growth, especially the early crops like barley. In the centre and east, the harvest outlook is rather positive.

France: the outcome of the campaign is uncertain with crops weakened by an excess of precipitation accompanied by mild temperatures since the start of the campaign (superficial roots, size reduction, fungal diseases). The last dry weeks continued to weaken already fragile plants. The southern regions, relevant for durum production, are less affected.

Greece: the winter was generally dry, especially in the January-February period. In March and April overwet condition took place in most of the agricultural areas. Despite local fungal infections in Thessalia, the general yield outlook is positive, in reason of the fair distribution of rainfall events and the average to mild seasonal temperature condition.

Italy: very low rainfall and temperatures above the seasonal average were recorded during winter in the South of the country. Although the situation can improve during the critical phenological stages of flowering and grain-filling, the productive areas of durum wheat in Basilicata and Puglia (and to a less extent, Sicilia) are of concern.

Morocco: The country experienced more-or-less marked drought condition from beginning of December up to the end of March. The rainfall shortage was similar to what the country experienced in 2016 (the worst in the last 10 years).This drought has already doomed large cereal planted areas (more than 2 Mha rainfed). Production of durum wheat will be particularly reduced, as well as barley.

Portugal: Areas sown with winter cereals suffered a new reduction in this campaign. The weather has been hot and dry in the regions south of the Tagus River. Average yields are expected to be good in Alentejo, the main cereal production region in Portugal, whereas poor in Algarve (<1% the national production).

Spain: Winter cereals have been subjected to an exceptionally mild Winter and benefitted from abundant rainfall supply. In contrast, the first months of the year were dry and jeopardized crops in the south of Spain significant for durum production. Nevertheless, rains at the end of March started to shift the situation, in the wait of the April-June weather which is more critical to determine next yields.

Tunisia: Conditions are slightly less favourable than last year. The level of precipitation was favourable in the northern coastal governorates with good harvest prospects while the central regions have experienced marked drought since the beginning of the year, primarily impacting the plots of barley.

Turkey: The crop conditions are favourable in general thanks to rainfalls in March that reversed the dry situation observed in Central Anatolia. Yields for wheat and barley are expected to be a bit higher than the 5-Y average upon future meteorological conditions.

General methodology: *The forecasting methodology is based on the monitoring of crop conditions using indicators derived from Earth observation, carried out jointly by the CIHEAM-IAMM and the Joint Research Centre of the European Commission (JRC). This allows detecting areas of concern, deviating from normal conditions, which are characterized using the GEOGLAM scale and nomenclature (see below). These pre-screened areas of concern, defined at a sub-national level, are then analyzed, validated or completed by each National Focal-points of the MED-Amin network, taking into account feed backs from field observation and local experts.*

Crop conditions legend (GEOGLAM scale and nomenclature):

- Exceptional: Conditions are much better than average at the time of reporting. This label can only be used between the grain-filling stages to the harvest stage (which started in Egypt, Lebanon, Malta and parts of Tunisia and Morocco).

- Favorable: Conditions range from slightly below to slightly above average at the time of reporting.

- Watch: Conditions are not far from average but there is a potential risk to final production However, at this time it is considered that crops might still recover if conditions improve. This label may only be used between planting/early-vegetative stage and vegetative/reproductive stages.

- Poor: Conditions are well below average and are very likely to impact production with a harvest clearly below average.

- Crop failure: Crops have been strongly damaged, low yield and area reduction will strongly impact the production.

→ Update of the harvest forecasting: The 2nd MED Amin Bulletin of crop conditions and harvest forecasting for soft wheat, durum wheat and barley in the Mediterranean region will be published in June, after the monitoring of April-May conditions cross-checked from the ground.

Stay tuned!

European Commission

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