



## MED-Amin Bulletin 2020 – 3 (Outlook at beg. June 2020)

*June 2020*

**Unfavourable weather conditions hampering winter crops potential in Northern and Eastern France and Western Maghreb; Favourable to exceptional season in Iberian Peninsula and eastern Mediterranean countries.**

The present bulletin is a **general outlook on the cereal harvest in the Mediterranean region**. It provides early qualitative forecasting of the 2020 cereal campaign, with a particular focus on **soft wheat, durum wheat and barley**. This is the final update which provides an assessment of the situation **at mid-June**. Other two outlook bulletins were already published on 16 May and 8 June 2020.

This initiative to the pilot action for monitoring crop conditions 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 Mediterranean countries and coordinated by the CIHEAM, aims to share information so as to fight prices volatility within agricultural markets. This initiative lays the **foundation for an early warning system** towards food security issues in the region.<sup>1</sup>

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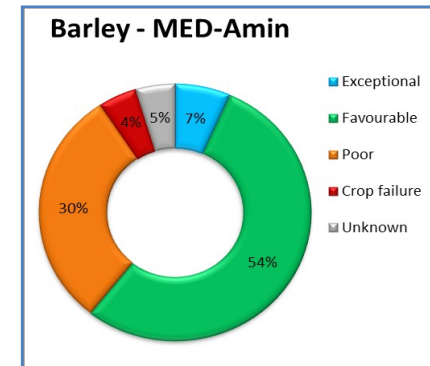
<sup>1</sup> For more info: [www.med-amin.org](http://www.med-amin.org), <http://ec.europa.eu/jrc/en/mars> and <http://cropmonitor.org>

## Regional outlook summary

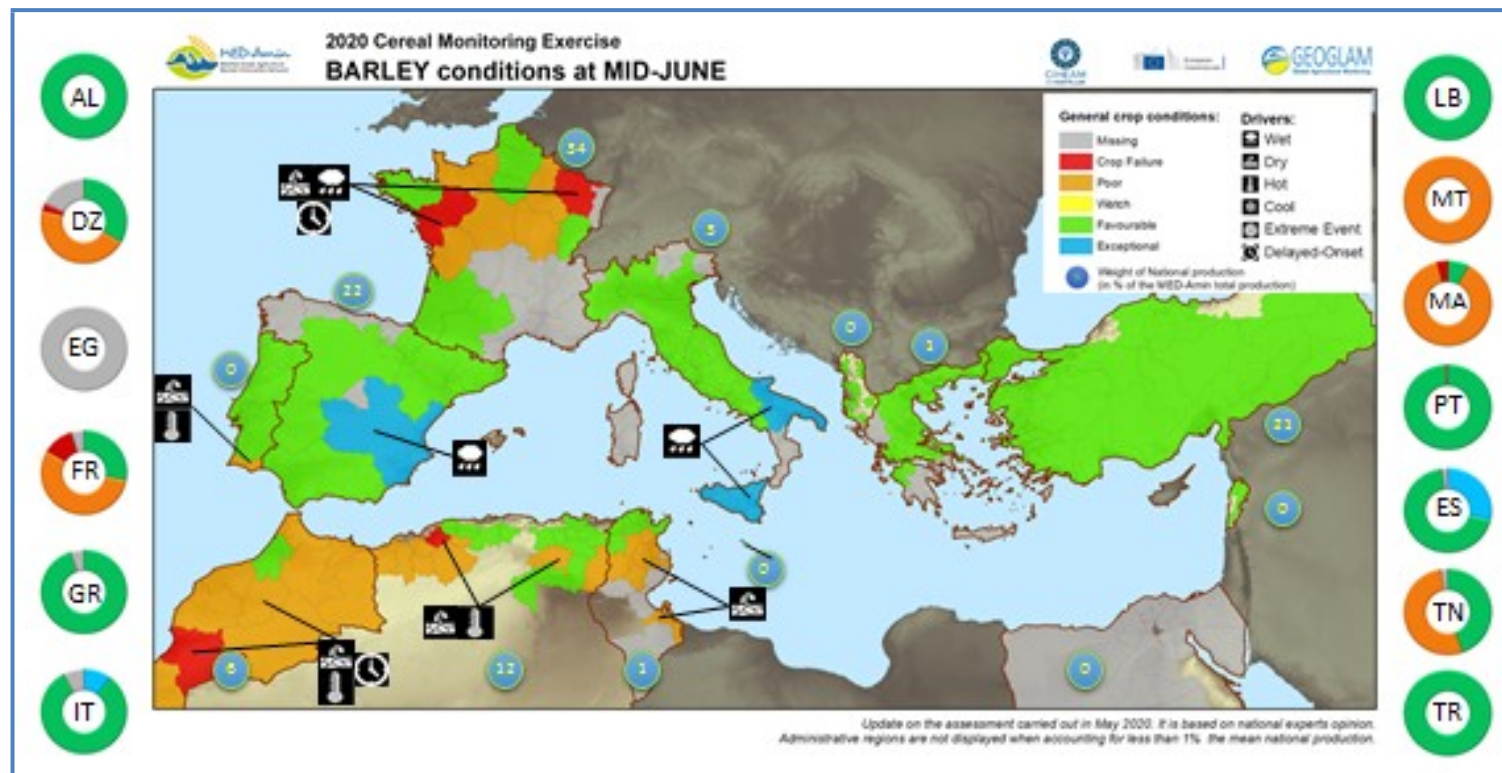
At the beginning of June 2020, the general outlook for the winter **crop harvest in the Euro-Mediterranean regions is good and in line with the last 5-year average conditions**. In the Northern rim, despite some delayed onset of winter crops due to a rainier than usual Autumn and Winter, plant development was sustained by warm temperatures combined with adequate soil moisture in February, March and April. This winter was one of the warmest recorded for most of the monitored regions. Rainfalls in March and April stopped long-lasting dry conditions featuring some of the regions. Northern and Eastern **France** remains of concern, with degraded crop conditions for soft wheat and barley production meanwhile they are close to average for durum crops in the South. It is due to combined effect of over-wet conditions at the beginning of the campaign and dry conditions in Spring. Other **Euro-Mediterranean countries** benefitted from favourable weather conditions during critical phenological stages (from April till harvest time), locally being exceptional, as in the cases of **Spain, Portugal and Italy**.

On the **Eastern Mediterranean**, winter crop outlook is in-line-with an average season in **Greece, Albania, Lebanon and Turkey**, with locally above-average inputs. In **Maghreb**, despite of some rains in April, winter cereals prospects remains critical in **Morocco** because of the seasonal lasting drought and above-average thermal profile. Almost half of planted barley and wheat failed this season. In **Algeria**, national yields might be close-to the 5-Y average, as the result of opposite (western versus eastern) crop conditions. In **Tunisia**, the weather was adverse mainly for central-inland regions. Occurred heatwaves and water deficit had a significant negative impact on barley crops.

**BARLEY** is clearly the crop most affected by adverse abiotic conditions at regional level (see the pie-chart beside on the right) this campaign. About a third (34%) of the MED-Amin planted area is highlighted as 'Poor' or 'Crop failure'. However, more than 60% the planted area developed from favourable to exceptional conditions. In North Africa, the most advanced crop calendar (compared to wheat) highly exposed plant grain filling stages to the latest seasonal heatwaves and rain deficit. In some European countries, barley was more affected by lasting wet conditions till February 2020 on already fragile plants since Autumn 2019 and then by drying conditions in the April-June period.

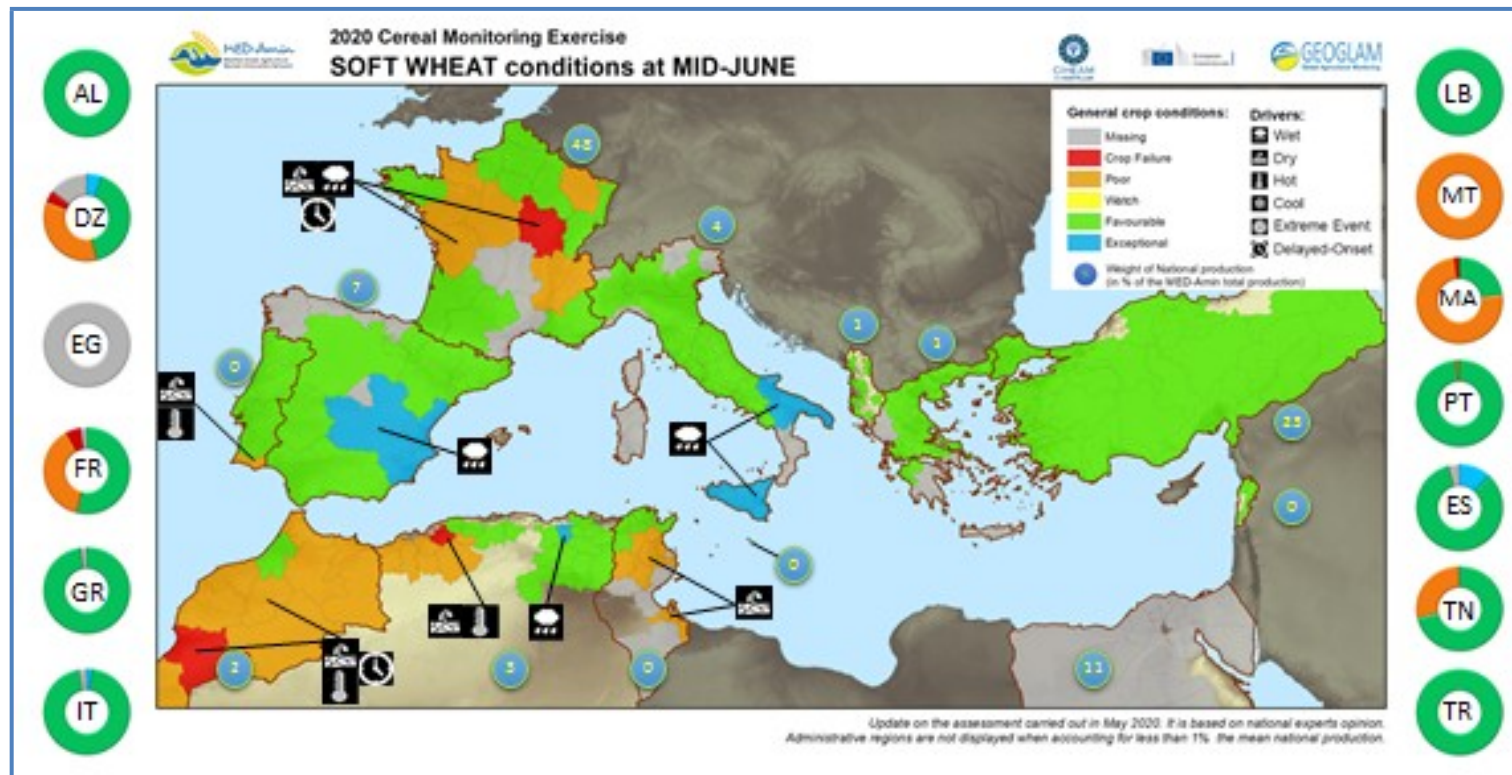
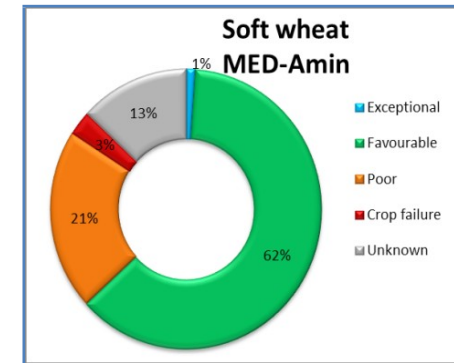


For example, In **France** (FR) accounting for 34% the MED-Amin area barley supply (based on the 5-Y average), several Central and North-Eastern regions remain in 'Poor' crop conditions, or even in 'Crop failure' in *Lorraine* and *Pays de la Loire*. This concern lasts despite a slight improvement since the monitoring of the end of April, which nearly corresponds to 2/3 of the French supply (see pie chart on the left side of the map below).



**SOFT WHEAT** supply is better preserved since the beginning of the campaign even if a quarter (24%) of the MED-Amin planted area is in 'poor' conditions or 'crop failure' (see pie chart beside on the right). Harvest outlook is rather good in general in most of the productive regions.

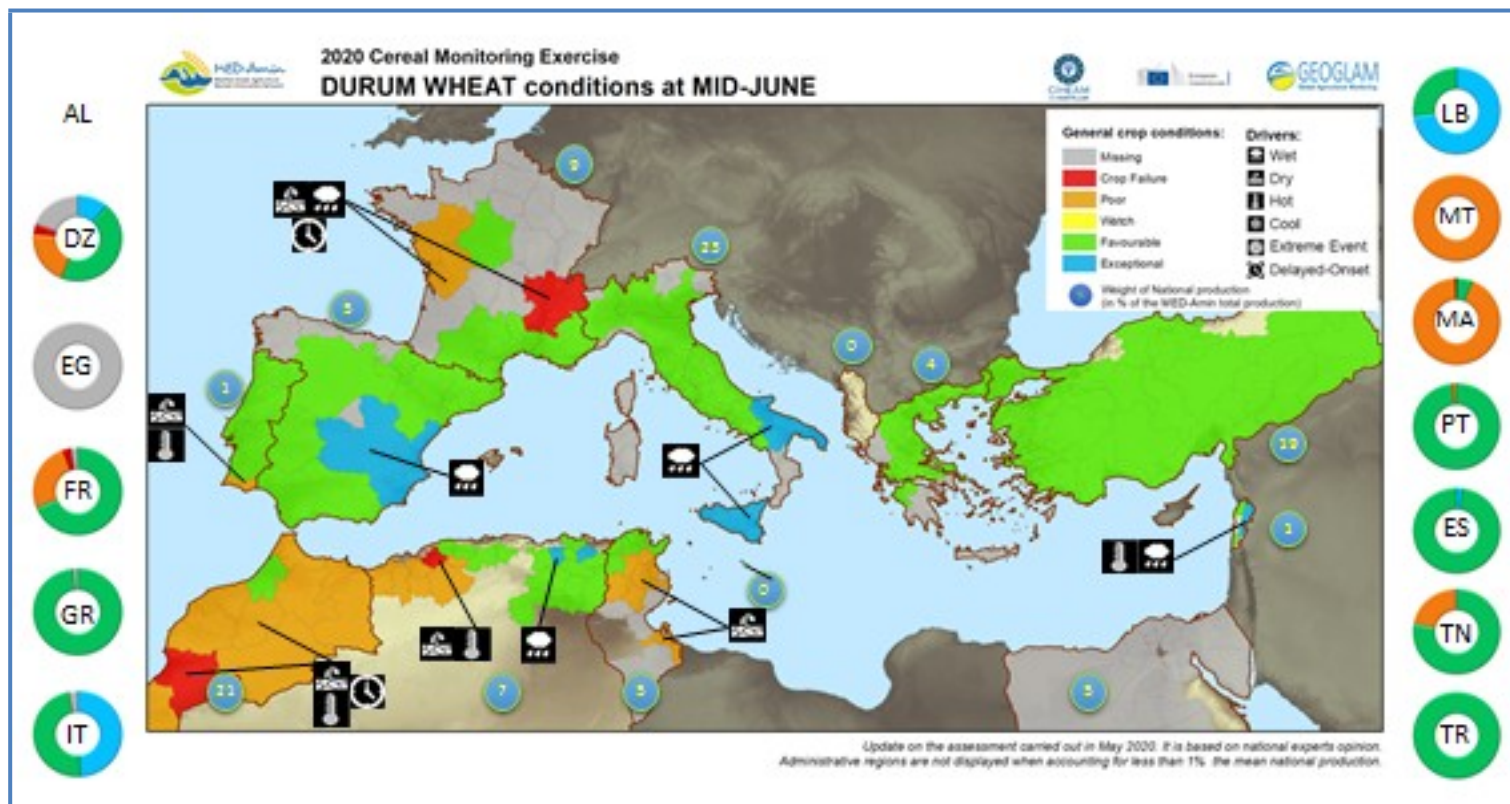
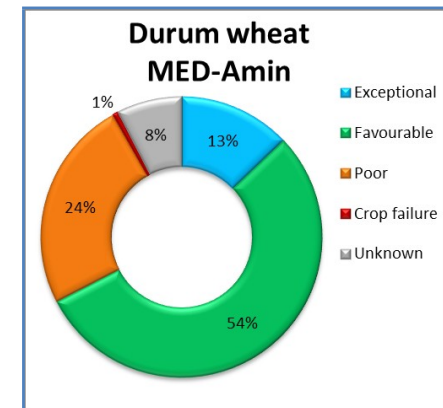
For instance, all the soft wheat from **Turkey** (TR), whose production accounts for 23% the MED-Amin production, is considered under favourable conditions at mid-June (see the corresponding pie chart for TR on the right side of the map below). In Spain (7% soft wheat MED-Amin production), the next harvest outlook is promising: 84% under 'favourable' conditions and 12% 'exceptional'.





**DURUM WHEAT** is a typical Mediterranean production (47% the World production), and this **crop is developing under mixed conditions so far**. More than 50% the acreage in the MED-Amin region grew favourable condition (and even 13% as 'exceptional'). 1/4 is considered as 'poor' or 'crop failure' (see pie chart beside on the right).

In **Algeria (DZ)**, accounting for 7% the production in the MED-Amin area, crop conditions are mixed: the majority 'favourable' (45%), a portion 'exceptional' (11%) and another portion critical (4% 'crop failure', 20% 'poor'). In **Morocco (MA)**, the situation remained stable compared to the outlook of April, but with a real decrease of yields and production if compared to the previous (2018-2019) already negative campaign.



## National highlights



↔ **Albania:** crop development follows the general trend, despite localized dry, wet or even hot events. April conditions were particularly favourable throughout the country, improving the expectations in struggling areas (e.g. in *Kukes* and *Dibra*). In June, the situation even improved in some counties. Most of the soft wheat and barley crops are at the stage of maturity, with exception of *Korça* a bit delayed. Extreme events of hailstorm in some areas of *Korça*, *Fier* and *Elbasan* regions did not impact the final national output. The campaign is expected to be normal and with expected 2020 campaign production in line with the medium-term average, with high yield for wheat, barley (and oats) around 3.9 - 4 t/ha.



↔ **Algeria:** following the delay in planting in most of the favourable rainfed regions, drought took place since January in the west of the country and disrupted the vegetative growth, especially the early planted crops like barley. Precipitation recorded during April recovered partially only some crops in the West but more substantially in Central regions (crop failure rate is around 46% for the wilaya of *Relizane* and between 15 and 30% for the rest of the Western wilayas), in particular late-planted zones, with very likely negative impact on the regional harvest. In the Central-Eastern wilayas, April rainfall allowed a good recover of vegetation, which was coupled also by an efficient nitrogen fertilization and pest control; the harvest outlook there is positive, in particular for soft and durum wheat crops in *Guelma* and *Mila* (yields may vary around 2.8 – 3.4 t/ha). Contrasting conditions between the West and the East will most likely result in a slightly above average season once aggregated at the national scale. Little has changed up to the beginning of June.



**Egypt:** *Egypt is not displayed on the map or on pie-charts due to the lack of feedback from the Focal Points. However, the overall outlook is likely favourable thanks to noticeable seasonal rainfall were above average values. Harvest is under way.*



↔ **France:** the outcome of the campaign is highly uncertain with jeopardized crop conditions. The excess of precipitation and mild temperatures since Autumn 2019, combined with a late but severe drought appears to be the main causes. The end of March and April were marked by a water deficit in the East, which caused plant shortening and raised questions about the nitrogen assimilation efficiency. *Bourgogne* and the *Grand-Est* regions were particularly affected. The lack of water has slowed the spread of disease. In May, hot weather caused scalding. The water deficit continued, with some stormy rains too irregular, which was not favourable for a good filling of the grains. The drop in temperature at the end of May / beginning of June and the return of the rains came too late for most crops, given the stage of development. In

the North, where the stages were a little less advanced, the water deficit remained a concern. In the South, crop conditions continued better than in the North and suggest a good harvest in particular for durum wheat.



↔ **Greece:** the winter was generally dry, especially in the January-February period. In March and April overwet conditions and mild temperatures took place, favouring winter cereal growth in most of the country. Due to April rainfalls, fungal infections were reported in some areas of *Thessalia*. In some cases, these infections were not treated on time, resulting in negative impact on tillering and filling, especially in durum wheat. In general, Barley benefitted the most from this campaign conditions. The meteorological conditions for *Sterea Ellada*, *Dytiki Ellada* and *Thessalia* that prevailed at the beginning of June remained favourable and a good harvest is expected for cereals, both quantitatively and qualitatively (with estimated averages of 3-3.5 t/ha for soft wheat, 2-3 t/ha for durum wheat and 3-4 t/ha for barley).



↗ **Italy:** During the development phases of the crops the climate was mild, with temperatures above the seasonal average and with episodes of drought. During the months of March and April rainfall replenished soil moisture, favouring crop development. Crop conditions are positive in all regions for all winter cereals, but it is even more positive in the southern regions where durum wheat is cultivated. The rains that are registered in the first week of June could cause a delay in the harvesting operations in concerned areas.



↗ **Lebanon:** This campaign was characterized by high precipitation regime with some cold spells extended longer than normal. A crop recovery process took place since beginning of March up to June 2020 where climate variables established good conditions. According to farmers, the output forecast is good. Durum wheat production could even be exceptional in the most productive region of the *Beqaa* (in particular for durum wheat). In other regions, out-of-average events occurred during this campaign, e.g. in *North Lebanon* or south (*Nabatieh*) with no noticeable impact on production.



↔ **Malta:** after a rainy period November that affected the seeding, December - March period was dry. The growing process of Winter crops was affected permanently till harvest. The crops either fail to grow or they mature very fast producing much fewer forage/seeds than average.



↔ **Morocco:** the climatic conditions of this year were poor and marked by a significant rainfall deficit and an inadequate distribution from beginning of December up to June. The rainfall shortage was similar to what the country experienced in 2016 (the worst in the last 10 years), with nearly 55 hot days and no rain. Consequently, the area initially devoted to cereals during the current season was around

4.3 million but only 2.3 million hectares were harvested, leaving not harvested fields being grazed by livestock. The Moroccan Ministry of Agriculture estimates a total cereal production of 30 million quintals.



➤ **Portugal:** Areas sown with winter cereals suffered a new reduction this campaign. The weather has been hot and dry in the regions south of the Tagus River. After 2 months (March and April) with some rainfall, water accumulation in the soil has improved and crops vegetative growth has recovered significantly in *Alentejo*. Due to the increase of soil water content and warmer temperatures, crops yields are expected to be above the last 5-year national yield averages. In May and the beginning of June, crop conditions in *Alentejo* remained favourable with good outlook.



➤ **Spain:** winter cereals have been subjected to an exceptionally mild Winter and benefitted from abundant rainfall supply. By contrast, the first months of the year were dry. Fortunately, rainfalls of March combined with warmer-than-usual temperatures have alleviated the situation, a bit critical in some areas with Durum wheat. Due to the more humidity and temperature there has been more diseases affection. Everything suggests that barley and wheat harvests will be good likely with above-average yields at national scale and a production of the three crops significantly above the 5-Y average.



➤ **Tunisia:** winter crop conditions are 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 drought since the beginning of the year and above-average daily temperature since mid-April; primarily impacting barley crops. April rainfall partially helped crops to recover in most of the governorates. Considering regional disparities, barley production will likely be below average, and soft wheat and durum wheat production will likely be on the average (last 5-Y-average). Expected cereal yields, compared to the previous (very positive) campaign are set to decrease vs 2019. Cereal harvest is expected to reach 15.7 million quintals this year, compared to 24 million quintals in the past season.



↔ **Turkey:** Although the amount of rainfall in the planting period was small in this season, it took place when the crops needed it in particular in *Central Anatolia*. Plant development is in line with average in June, and it is expected to obtain high quality products and high thousand grain weight in general. Yields for wheat and barley are expected to be a bit higher than the 5-Y average. Thanks to favourable conditions and a specific programme of agricultural development, it is expected an increase in yield and production (the areas of wheat plantings increased by 5-10%). In some regions, harvest has already begun.



**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.

→ **Evolution of the harvest forecasting:** Compare the evolution between the 3 monitoring period by reviewing the MED-Amin Bulletins <https://www.med-amin.org/en/home/9-news/150-med-amin-harvest-forecasting-2020-2-june-update>.

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