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MED-Amin

Harvest & Sowing Bulletin

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Disclaimer

This document provides an overview of the results of the harvest for the 2023/24 winter crops (soft wheat, durum wheat, barley) and summer crops (maize, rice), as well as the progress of the 2024/25 sowing campaign in MED-Amin countries. The analysis is based on data collected from the network's focal points, national statistics, and international organizations, including [EUROSTAT](#), the European Commission's Joint Research Centre ([JRC-MARS](#)¹ Bulletins of October 28 and November 25), and [USDA FAS](#)².

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¹ Joint Research Centre – Monitoring Agricultural Resources

² United States Department of Agriculture – Foreign Agricultural Service



ALBANIA

Summer crops progress

A significant increase in both the cultivated area and production of maize has been observed in the *Tirana* district, partially attributed to favorable conditions during the planting season. National-level data is not yet available. Rice is not cultivated.

Winter crops results

The increased degree of mechanization in agricultural work processes has significantly reduced the number of days farmers spend in the field for wheat and barley cultivation (with approximately 60 working days required for the sowing campaign). Combined with the introduction of new cereal cultivars and technical assistance, this has led to significant improvements in both production levels and quality. In *Korçë*, new irrigation schemes have been implemented to address prolonged drought conditions, utilizing rain-type irrigation systems in specific areas where feasible.

Nationally, agrometeorological conditions have been favorable during the growing period. In the *Tirana* district, both the harvested area and production of soft wheat and barley have experienced a significant year-on-year decline. However, barley harvested area and production remain above the five-year average. In the *Korçë* and *Berat* districts, scientific research and experimentation on varietal improvement conducted in recent years have resulted in the introduction of more productive and higher-quality grains varieties. Durum wheat is not cultivated.

Winter crops progress

Different trends are observed in the sown area for winter crops. In some districts, such as *Tirana* and *Gjirokastër*, there is a decline in soft wheat cultivation due to low selling prices that fall below rising production costs, particularly for inputs like mineral fertilizers. Consequently, the wheat sown area in *Tirana* district is expected to decrease compared to 2023/24 season, while the barley area is anticipated to remain stable. In other districts, winter crop areas have remained stable (*Berat*), or have seen a gradual and consistent increase in both sown area (*Korçë*) and production in recent years (*Korçë*, *Berat*). The positive trend suggests a moderate increase in the area to be planted with winter crops for the 2024/25 season, compared to previous years.

Planting of winter crops is currently underway or nearing completion. In *Korçë*, the planting of soft wheat and barley began on October 10, 2024, while in *Berat*, it started on November 1, 2024. Agrometeorological conditions in October were favorable, supporting the planting process.



ALGERIA

Summer crops progress

Maize and rice cultivated areas are very small in Algeria.

Winter crops results

Agrometeorological conditions were contrasted during the growing season. According to the USDA, production levels for soft wheat, durum wheat and barley are estimated to be close to the five-year average.



Winter crops progress

According to the November EC-JRC MARS bulletin, temperatures were unusually high, and rainfall was below average, at least until mid-November. This led to dry soil conditions, which were unfavorable for sowing, especially in northern Algeria. Rainfall is urgently needed, and sowing is likely to be delayed.



EGYPT

Summer crops progress

Favorable agro-meteorological conditions (adequate rainfall and stable temperatures) and efficient resource management, contributed to timely and high-quality harvests of maize and rice, reducing reliance on external stock. Improvements in logistics and storage further ensured timely harvesting and preserved crop quality. No significant losses were reported, and production levels were consistent with the previous year.

In terms of total harvested area, maize planting increased by 13% year-on-year, reaching 806 000 ha. This growth was driven by effective resource allocation, economic factors, pest control, market demand, and favorable climatic conditions. Conversely, rice cultivation experienced a 21% year-on-year reduction, declining to 537 000 ha, likely due to water management policies and a shift towards more sustainable agricultural practices. Production totalled 6 100 000 t for maize (-11% compared to the five-year average) with an average yield of 7.5 t/ha, and 5.0 Mt for rice (+4% compared to the five-year average) with an average yield of 9.4 t/ha.

Maize quality is good, with minimal pest or weather-related damage. Rice quality is excellent, characterized by high kernel density, uniform grain size, and optimal moisture content, making it suitable for both domestic consumption and export.

Winter crops results

Egypt's winter crops (soft wheat and barley) performed well, benefiting from favorable agro-climatic conditions and a slight increase in planted areas: 1 366 700 ha for soft wheat (+2.7% year-on-year) and 30 500 ha for barley. Consequently, soft wheat production was in line with the five-year average, reaching 9 400 000 t (6.9 t/ha), while barley production was above the five-year average by 17%, totalling 122 520 t (4.0 t/ha). Soft wheat harvests experienced slight delays due to logistical constraints and resource distribution challenges, whereas barley harvests were slightly ahead of schedule.

The overall quality of soft wheat is good, despite minor fluctuations caused by weather-related delays. Barley quality is also good, with uniform grain.

Winter crops progress

Sowing for soft wheat is likely completed, and it is expected to be finished by mid-December for barley. The total planted area is expected to remain consistent with previous years, with minor adjustments driven by government incentives and improvements in irrigation infrastructure. Additionally, ongoing trials of new wheat varieties aim to enhance yields.



FRANCE

Summer crops progress

Maize grain planting was delayed this year due to excessive rainfall and lack of favorable planting windows, which led to rooting difficulties and soil compaction. According to Arvalis - Institut du



Végétal, 10% of maize grain planting occurred after June 10th. These adverse conditions delayed early developmental stages, particularly emergence, as well as subsequent growth phases, ultimately resulting in late harvests. By week 44, 58% of the maize areas had been harvested, reflecting a 35% delay compared to the previous year. This delay has increased the risk of grain quality deterioration, despite the fact that areas rated in good and very good condition remained relatively stable. The maize harvests were completed by late November.

Total harvested area is projected to increase by 7.4% compared to the five-year average, reaching 1 539 000 ha. Production is forecast to reach 14 600 000 t representing a 9.9% increase compared to the five-year average and a 12.6% rise from the previous year. Excluding seed production, the average yield is estimated at 9.3 t/ha, showing a slight decrease compared to last year but a modest increase relative to the five-year average, with notable regional disparities.

The harvested area for rice is expected to reach 14 000 ha, with production forecasted at 74 000 t (5.4 t/ha), representing a 3.5% increase compared to the five-year average.

Winter crops results

The 2024 winter crop harvest was significantly affected by excessive rainfall in autumn 2023, which delayed essential field operations—sowing, soil preparation, and weed management—and restricted field accessibility. As a result, the season has been atypical, with growing conditions notably worse than in previous years. Consequently, the harvested area for soft wheat declined significantly to 4 190 000 ha (-12% year-on-year), accompanied by a sharp decline in production with 25 600 000 t (-26.1% relative to the five-year average), with yields estimated at 6.1 t/ha.

Harvested areas for durum wheat and barley remained stable with 240 000 ha and 1 816 000 ha, respectively. However, production levels were lower, though less severely impacted than soft wheat, with durum wheat output at 1 200 000 t (5.1 t/ha) and barley at 9.9 Mt (5.4 t/ha), representing declines of 14.6% and 16.9%, respectively, relative to the five-year average.

Winter crops progress

By week 44, planting progress had almost caught up with the pace of the previous year, after a significantly delayed start. By week 41, sowings of soft wheat and barley were lagging by 32% and 45%, respectively, compared to the previous season. These delays were primarily caused by adverse climatic conditions and excessive rainfall, which limited field access for producers. By the end of November, planting activities were either completed or nearly finished.



GREECE

Summer crops progress

According to the October EC-JRC MARS bulletin, hot and dry conditions adversely impacted summer crops, leading to poor results, with maize yields estimated to be at least 12% below the five-year average (9.4 t/ha according to EUROSTAT). Rice yields are estimated to be particularly low at 4.5 t/ha, well below the five-year average (-38%). Production is estimated at 1 036 200 t for maize and 123 600 t for rice according EUROSTAT, reflecting a decrease of 21% and 47% respectively, compared to the five-year average. This reduction is partly linked to a decrease in cultivated and harvested area, with 110 700 ha for maize (-15% year-on-year) and 27 300 ha for rice (in line with previous year but 13% below the five-year average).

**Winter crops results**

According to EUROSTAT, winter crops production has significantly decreased both compared to the five-year average and year-on-year. Soft wheat production is down to 262 500 t (-12% and -24% respectively), durum wheat to 564 900 t (-34% and -41% respectively), and barley to 255 400 t (-28% and -30% respectively). This decline is primarily due to a reduction in the area cultivated and harvested, as well as crop rotation. The areas for soft wheat, durum wheat, and barley are reported at 88 700 ha, 172 800 ha, and 98 700 ha respectively, reflecting year-on-year decreases of 24%, 48%, and 25%. Consequently, yields remain close to the average levels, with 3.0 t/ha for soft wheat, 3.3 t/ha for durum wheat, and 2.6 t/ha for barley, as agrometeorological were generally favorable.

Winter crops progress

Weather conditions improved during autumn, benefiting the sowing campaign, which is expected to be completed, according to EC-JRC MARS bulletins.

**ITALY****Summer crops progress**

According to the EC-JRC MARS bulletins, summer crops in northern Italy were affected by rainfall until mid-October, which delayed the completion of the harvest. The total harvested area for maize is estimated at 499 000 ha, consistent with the previous year but 11% below the five-year average. Production is projected at 5 400 000 t (10.8 t/ha), slightly exceeding last year's output but also 11% below the five-year average.

Winter crops results

The total harvested area for barley reached 278 000 ha, slightly below the previous year (-4%) but 4% above the five-year average. Production amounted to 1 100 000 t (3.9 t/ha), 5% lower than the previous year but consistent with the five-year average.

The total harvested area for durum wheat was 1 177 000 ha, a 7% decrease compared to the previous year. Production reached 3 500 000 t (3.0 t/ha), reflecting a 9% decline relative to the five-year average.

Winter crops progress

Similar to the summer crop harvest, winter crop sowing was delayed due to rainfall and began in early November, according to the November EC-JRC MARS bulletin. Meanwhile, dry conditions in Sicily are raising concerns for durum wheat sowing, which is typically completed in December.

**LEBANON****Summer crops progress**

Maize is considered a secondary crop, primarily cultivated for animal feed rather than human consumption, and grown mainly as part of crop rotation systems. As a result, it receives less investment and development effort. Additionally, the local economic crisis has further constrained the growth of maize production, as farmers tend to prioritize higher-value crops that offer better market prices. Consequently, both the harvested area and production have remained low and stable in recent years, at approximately 1 000 ha and 7 400 t, respectively (7.4 t/ha).



Rice is not cultivated in Lebanon due to the country's inadequate environmental conditions. Therefore, rice is entirely imported to meet domestic demand.

Winter crops results

The rainy season from September 2023 to May 2024 recorded approximately 200 mm more rainfall than average with precipitation evenly distributed across the months. This supported crop growth and resulting in an above-average yield for rainfed crops.

However, the harvested area for soft wheat is practically unchanged since 2021, with minimal growth, as soft wheat in Lebanon faces challenging climate conditions (low rainfall, rising temperatures) and is particularly susceptible to rust disease. As a result, many farmers continue to prefer durum wheat, which is better adapted to the country's drought conditions. Additionally, the local economic crisis has negatively impacted farmers, and durum wheat commands higher market prices, making it a more attractive option for farmers looking to maximize their income. This year, the total harvested area was 14 000 ha for soft wheat and 38 000 ha for durum wheat, with respective production of 40 000 t (2.8 t/ha) and 111 000 t (3.0 t/ha). Efforts to introduce new, climate- and disease-resistant soft wheat varieties are ongoing but face economic and practical challenges.

Barley is primarily grown for animal feed and serves as an important component in crop rotation systems. Moreover, it is a low-cost crop to maintain, as farmers typically do not apply fertilizers or engage in intensive agricultural practices for its cultivation. This characteristic allows barley to thrive with minimal investment, further strengthening its status as a practical and economical choice for many Lebanese farmers. As a result, the harvested area has remained largely the same over recent years, reaching 12 000 ha for a production of 32 000 t (2.7 t/ha).

Overall, the preference for durum wheat and barley reflects a strategic response to the prevailing climatic and economic conditions, underscoring the challenges faced by soft wheat cultivation in Lebanon. This highlights the need for continued research and development to improve crop resilience and adapt to changing environmental factors.

Winter crops progress

The Ministry of Agriculture aims to gradually expand the cultivated areas of wheat and barley, with a focus on soft wheat (primarily used for bread-making) to reduce imports and enhance food sovereignty. As part of this initiative, the Ministry plans to procure and distribute rust-resistant soft wheat seeds suited to the region's climatic conditions for the second consecutive year.

This year, the ongoing conflict has interrupted these initiatives before they could begin. The conflict is negatively impacting sowing and has prevented the Ministry from providing the necessary support. As a result, farmers—especially in the *Beqaa* and *Baalbek-El Hermel* regions, which are traditionally known for large-scale wheat production—find themselves in a critical situation. Consequently, progress in winter crops were minimal at the end of October, highlighting the urgent need for stability to enable effective wheat cultivation and ensure local food security. Various initiatives aim to support farmers, particularly by providing seeds, and significant efforts are being made to catch up, at least partially, with the sowing campaign. Sowing is usually expected to be completed by mid-December for soft and durum wheat, and by the end of December for Barley. However, it may extend until mid-January, although such delays could negatively impact crop yields. The projected acreage for the 2024/25 season is 20 000 ha for soft wheat, 50 000 ha for durum wheat and 15 000 ha for barley.



Additionally, the Ministry intend to assist farmers in securing water for irrigation during early spring, when rainfall decreases, to enhance grain filling and overall yield. Subsidies for essential agricultural practices are also to be provided by the Ministry to support farmers during the ongoing financial crisis.



MALTA

Cereals are not produced.



MOROCCO

Summer crops progress

No information.

Winter crops results

The 2023/24 campaign was affected by a prolonged drought, resulting in low production. According to the USDA, production is estimated at 1 770 000 t for soft wheat, 700 000 t for durum wheat and 650 000 t for barley, representing year-on-year decreases of 41%, 41% and 52% respectively. The harvested area is estimated at 2 200 000 ha (-12% year-on-year) for total wheat (soft wheat and durum wheat), and 800 000 ha for barley (-32% year-on-year).

Winter crops progress

Some parts of northern Morocco are under dry soil conditions, and could impact negatively the sowing campaign.



PORTUGAL

Summer crops progress

The maize and rice campaigns had been progressing well, with generally favorable agro-meteorological conditions (good average temperatures and well-distributed rainfall during critical crop phases), except in *Beira Litoral* region. However, during the harvest period, weather conditions deteriorated, with rainfall and strong winds leading to occasional lodging in some areas, resulting in damaged areas. This also caused a minor delay in the harvests: by week 43, 60-70% of the maize had been harvested (down 15% year-on-year), and 66-90% of the rice had been harvested (down 10% year-on-year).

Damage to crops, combined with a 25-30% decrease in the maize area sown in *Alentejo* and lower maize market prices, has resulted in a decrease in the total harvested area and to a reduction in final production. The total maize harvested area is expected to decrease by 8% year-on-year, reaching 64 000 ha. The rice area is anticipated to be the same as last season, at 27 900 ha. Estimated production is 654 000 t for maize and 178 830 t for rice. Productivity is expected to be similar to last year, with 11.0 t/ha for maize and 5.7-6.5 t/ha for rice, slightly higher than the five-year average (+3%).

The quality of both crops is expected to be comparable to last year. The first maize harvests showed good grain quality, but subsequent harvests were affected by humidity and harvesting conditions. As for rice, while quality varies by variety, the majority is of good quality, with slightly higher levels of broken grains than in previous years.

Winter crops results

The autumn-winter cereal campaign showed improvement compared to the previous year, which was the worst in the last decade. This campaign experienced average temperatures and relatively low



precipitation. Weather conditions were favorable in *Alentejo*, the country's main cereal-producing region, resulting in above-average yields for wheat and barley: 2.6 t/ha for soft wheat (+22% compared to the five-year average), 3.3 t/ha for durum wheat (+35%) and 3.6 t/ha for barley (+35%).

Nearly all areas were successfully harvested due to good productivity, marking a year within normal standards. In contrast, the 2022/2023 campaign was among the worst in recent decades, characterized by low productivity and widespread failure of rainfed crops, many of which were either not harvested or had negligible yields. The areas cultivated were 22 300 ha for soft wheat, 4 200 ha for durum wheat and 13 100 ha for barley. Nationally, the production outlook is positive, exceeding last year's figures and aligning with the five-year average, with 52 350 t of soft wheat, 11 780 t of durum wheat and 34 800 t of barley. However, increased production costs combined with low market prices have resulted in reduced net margins for producers.

Qualitative parameters for both soft wheat and durum wheat were lower than in previous campaigns. In *Trás-os-Montes*, the quality of soft wheat deteriorated due to fungal contamination, relegating it to use as livestock feed, while barley quality remained good. In *Ribatejo e Oeste*, soft wheat was of medium quality. Meanwhile, in *Alentejo*, soft wheat, durum wheat, and barley ranged from medium to good quality.

Winter crops progress

There are no significant differences compared to the previous year, and the agro-meteorological conditions are favorable. Sowing is likely completed for soft and durum wheat and is expected to finish by the end of December for barley. Total planted areas are estimated to be similar to last year, though it is still too early to determine this precisely.



SPAIN

Summer crops progress

The agro-meteorological conditions have been favorable this year. In general, optimal water availability and summer temperatures were key factors in achieving average rice yields, although rainfall has delayed the maturation of maize.

The total harvested rice area is estimated at 81 290 ha, with production reaching 577 000 t (7.1 t/ha). This marks a recovery in the main production regions, particularly *Andalucía* and *Extremadura*, which account for 50% of the total cultivated area. These regions experienced significant irrigation restrictions in the previous year, resulting in a dramatic reduction in rice cultivation. Consequently, the harvested area has increased by 48% year-on-year, and production has returned to align with the five-year average (+1%).

In *Andalucía* and *Extremadura*, rainfall delayed sowing, which, in turn, postponed the start of harvesting. In other producing regions, however, the harvest has progressed on schedule. Rice harvest is expected to conclude by early December. The quality of the harvested rice grain is reported to be average.

For maize, official data estimates the harvested area at 278 280 ha (+12% year-on-year) a recovery from the previous year exceptionally low figures caused by severe drought and depleted water reservoirs. Production is estimated at 3 300 000 t (11.6 t/ha), which is 17% below the five-year average. Excessive rainfall has hindered the ripening process, causing delays in the harvest. By week 44, only 8% of the maize harvest had been completed, and is expected to extend until the end of January.



Winter crops results

Winter crop production recovers after last year's drought-induced significant drop. Official data estimates a harvest of 16 600 000 t, representing a 90% year-on-year increase and a 5% rise compared to the five-year average.

Harvested areas were consistent with the previous year, totalling 1 702 000 ha for soft wheat, 265 000 ha for durum wheat and 2 302 000 ha for barley. Soft wheat production reached 6 400 000 t, representing a notable 12% increase compared to the five-year average (3.8 t/ha). Durum wheat production was recorded at 676 000 t (2.6 t/ha), while barley production totalled 7 500 000 t (3.2 t/ha).

Winter crops progress

Planting progress varies greatly among the different producing regions. While in some regions (e.g., parts of *Castilla y León*) soft wheat and barley planting is complete, in others (*Aragón* and parts of *Castilla La Mancha* and *Castilla y León*) rains are causing some delay. Consequent floods in eastern Spain had a limited impact on arable land and delayed sowings, but there are no major concerns as conditions remained optimal according to the November EC-JRC MARS bulletin. In other regions, such as *Andalucía*, sowing usually start after mid-November. As of week 44, sowing progress had reached 27% for soft wheat, 3% for durum wheat and 23% for barley. Sowing is expected to be completed by mid-December for durum wheat and barley, and by late December for soft wheat.



TUNISIA

Summer crops progress

Uncultivated.

Winter crops results

No information yet.

Winter crops progress

The period from September mid-November was generally marked by significant rainfall (an average of 80.5 mm nationwide), with regional surpluses reaching up to 87%. These conditions were beneficial for both water resources and agriculture. The wettest regions were the Centre-East (176.7 mm) and the North-East (141.9 mm), while only the North-West experienced a moderate deficit (-19%).

As of November 5, sowing of soft wheat had not yet begun, and durum wheat sowing had only just started. In contrast, barley sowing was already well underway. Sowing is expected to be completed by December for barley, and by January for soft wheat and durum wheat.

The expected sown areas are 40 000 ha for soft wheat, 606 000 ha for durum wheat, and 517 000 ha for barley, with a significant increase anticipated compared to the previous year. This growth is driven by the sector's general guidelines for the 2024/25 season, with key measures including:

- Encouraging farmers to cultivate durum wheat in the northern regions and irrigated areas as part of the goal for durum wheat self-sufficiency,
- Reviving soft wheat cultivation and expanding barley and triticale production in dry areas suitable for these crops,
- Promoting the irrigated cereal sector, particularly in central and southern regions.



TÜRKİYE

Summer crops progress

According to the October EC-JRC MARS bulletin, despite hot and dry weather during summer, agrometeorological conditions were overall favorable for summer crops, with yield forecasts close to the historical trend. According to TURKSTAT (October 25, 2024), maize production is estimated at 8 300 000 t, reflecting an 8.3% decrease year-on-year. Rice production is estimated at 1 001 000 t, showing an 11.2% increase year-on-year.

Winter crops results

According TURKSTAT (October 25, 2024), total wheat production (soft wheat and durum wheat) is estimated at 20 800 000 t, a decrease of 5.5% year-on-year. Typically, soft wheat production accounts for 81-84% of total wheat production. Barley production is estimated at 8 200 000 t, reflecting a 10.9% decrease year-on-year.

Winter crops progress

Despite regional disparities (with a rainfall surplus in Black Sea coastal region, for instance), most of the country experienced a rainfall deficit in November, according to the November EC-JRC MARS bulletin. As a result, soil moisture conditions were generally inadequate for sowing. The optimal sowing window in Türkiye is late November to early December.



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