



CIHEAM

International Centre for Advanced
Mediterranean Agronomic Studies

MED-Amin:
Crop & Planting Progress

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Our website proposes a variety of services: reference documentations and training material for focal points, news-feed dedicated to mediterranean cereal markets, handbooks and templates for the network's data collection... and more !



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

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 at the end of October 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.

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Legend:

Trends this year

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

Wheat (all)

● Global trends - Planting

It is estimated that, at the end of August, about 95% 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. As official stabilized statistics for this summer's harvests are still being released at this time and some harvests are still upcoming in certain countries (Southern Hemisphere), we will report in this section the latest estimates for this year's production (2016/17), as well as information on current planting campaigns when available (campaign 2017/18).

● World: On November 9, 2016, USDA forecasts a fourth record world-production in a row, at the level of 744.8 mln tons against 735,5 mln tons in 2015/16. Among AMIS participants, we observe the following trends:

● European Union (18% of world production¹): The average yield forecasted by MARS for the European Union on Oct. 21 is down 3.6% for the harvest 2016 as compared to the 5-year average for soft wheat. For durum wheat, the forecasted yield is within the 5-year average (+0.3%).

Winter wheat planting is already over for some countries in the region (UK, Poland), whereas they have delayed in large parts of Germany, Benelux countries, and within the North and the West of France, due to soil dryness. On the contrary, in the Eastern part of Europe, abundant rains may have impacted planting. In the southern part of France, in Italy, Spain and Turkey, planting is only starting. USDA again forecasted a declining production at 143.6 mln tons against 160 mln tons in 2015/16. AMIS, for its part, forecasts 144 mln tons (16/17) against 160.5 mln tons (2015/16).

● China (15%): USDA forecasts a downward production at 128 mln tons against 130.2 in 2015/16. AMIS gives the following estimates: 128.6 mln tons (2016/17) against 130.2 mln tons (2015/16).

● India (11%): Wheat in India is in since the month of June. USDA forecasts a production of 90 mln tons, finally better than last year's 86.5 mln tons in 2015/16, but still below the 2012-14 average (95 mln tons).

● USA (7%): USDA forecasts for 2016/17 a 62.9 mln tons harvest, up almost 7 mln tons against the 2015/16 campaign. AMIS: 63.2 mln tons (2016/17); 55.8 mln tons (2015/16). On Oct 12, winter wheat planting was already realized for $\frac{3}{4}$ of the expected areas and the emergence stage has already been reached for about 50% of planted surfaces.

● Russia (6%): The agricultural ministry announced on November 8 a total harvested volume of 75.8 Mt. Furthermore, stocks in the country are up by about 20% at a level of 12.6Mt for the agriculture and processing organizations.

The evaluation of harvest conditions proposed in November 2016 by GEOGLAM as part of AMIS Market Monitor indicated that crop conditions for countries that have started to plant wheat are favorable, except in China in the center and southern regions where continuous humidity may have affected winter wheat. For countries in the Southern Hemisphere for which harvests are still to come, conditions so far have also been favorable, except in the Western part of Australia where spells of cold could constrain yields.

1 2010-14 Average

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

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)
Algeria	(soft)	17/11/2016	537	+1%	13%	30%	Feb 2017	1.5
	(durum)	17/11/2016	1580	+3%	14%	23%	Feb 2017	1.7
France	(soft)	31/10/2016	na	na	78%	86%	na	7.2
	(durum)	31/10/2016	na	na	21%	57%	na	5.2
Greece	(soft)	3-11/11/2016	120	-8%	48%	45%	End of Dec. 2016	3.1
	(durum)	3-11/11/2016	320	-15%	45%	46%	End of Dec. 2016	2.8
Lebanon	(soft)	7/12/2016	4	Stable	7%	80%	Feb 2017	3.8
	(durum)	7/12/2016	12	15%	8%	80%	Feb 2017	3
Portugal	(soft)	31/10/2016	37	Stable	0%	0%	31/12/2016	1.5
	(durum)	31/10/2016	2.5	Stable	0%	0%	31/12/2016	1.8
Tunisia	(soft)	28/10/2016	na	na	0%	0%	na	2
	(durum)	28/10/2016	617	+20%	0%	na	na	1.9
Turkey	(soft)	28/10/2016	6600	Stable	95%	95%	March 2017 (spring)	2.4
	(durum)	28/10/2016	1270	Stable	95%	95%	March 2017 (spring)	2.7

na: non available

Trends - MED-Amin countries

As regards countries in the MED-Amin area, wheat planting is generally realized between September and November north of the Mediterranean and between November and December in the south.

- Albania: Soft wheat planting is over in Albania for stable production area since a few years.
- Algeria: Planting has been somewhat delayed this year in Algeria both for soft and durum wheat (respectively 13% against 30% realized and 14% against 23% for both type of wheat) on stable anticipated total areas.
- France: On Oct 31, durum wheat planting is characterized by a largest delay (21% realized against 57% last year) than soft wheat (78% against 86% in 2015) as a consequence of the relative dryness of soils.
- Greece: At the beginning of November, sowing in Greece is over by about 45%, in line with last year, on a total area down by 8% and 15% for soft and durum wheat respectively. In a few regions there is a reduction in soft wheat cultivated areas due to choice of other crops. Certain farmers use self-produced seeds of durum wheat in order to reduce production costs. In most of Greek regions for which data are available, the meteorological conditions were suitable for sowing. However, in some regions there was a delay in the beginning of sowing, due to inappropriate weather conditions (continuous rainfall or lack of rainfalls)."
- Lebanon: Wheat planting is usually over in February and was characterized this year by important delays. A slight increase in planted areas is observed.
- Morocco: New rainfall should allow planting to extend between mi-November and mi-December, contrarily to last year when they could not start before mi-February.
- Portugal: Planting has not started yet in Portugal at the end of October. Fields are currently being prepared for the next season.
- Tunisia: Soft wheat planting for the national marketing year 2017/18 has not yet begun at the end of October. Durum wheat planting is only just starting and records an increase in planted areas of about 20%.
- Turkey: Soft wheat planting is over in Turkey. Planted areas are conform to the average.

● Global trends - Harvest

It is estimated that about 75% of corn in AMIS countries (that is over 90% of the world production) have been harvested at the end of October.

● World: On November, 9 2016, USDA forecasts a world level harvest of 1030.6 mln tons against, 959.9 mln tons for 2015/16. Among AMIS countries, we observe the following trends:

● USA (29% of world production¹): On Nov 6, about 86% of the harvest has been realized, a little behind last year's and in line the 5-year average's usual progress. USDA forecasts a 386.8 mln tons production for 2016/17 against 345.5 mln tons last year. AMIS provides the following forecasts: 383.4 mln tons (2016/17) against 345.5 mln tons (2015/16).

● China (18%): Corn fields both in the southern and northern region have been harvested by now. USDA forecasts a 216 mln tons harvest (or 8.6 mln tons less than in 2015). AMIS forecasts for its part 217.04 mln tons (2016/17) against 224.6 mln tons (2015/16).

● Brazil (6%): Corn harvest are now over in Brazil. USDA forecasts for 2016/17 a harvest that is consistent with the 2012-14 average (83.5 mln tons) unlike last year's comparatively low levels (68.5 mln tons in 2015/16). AMIS: 65.5 mln tons (2016/17) against 85.5 (2015/16).

● European Union (6%): It is generally considered that corn harvests are half-way through in the EU at the end of the month of October. USDA forecasts a 60.3 mln tons harvest in 2016/17 against 58.5 mln tons in 2015/16. The MARS Unit largely corrected its forecasts as compared to August and gives forecasted yields below the 5-year average (+6.82 t/ha or -1.6%). Recently excess rain in the Eastern Europe Countries (Ukraine, Romania, Bulgaria, Hungary) may have delayed corn harvests in these countries, while MARS however gives them healthy yields as compared to last year and to the 5-year average. On the contrary, Germany, Benelux and France's have been largely impacted by a rain deficit. Southern European Countries on their part are characterized by predicted yields that are a little above those of the 5-year average. AMIS: 63 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: 39.8 mln tons (2016/17) against 33.8 mln tons (2015/16).

The evaluation of harvest conditions proposed in November 2016 by GEOGLAM as part of AMIS Market Monitor indicated that crop conditions were favorable to exceptional for about 1/3 of US harvests. In the EU, for a small part of planted areas, heavy rain at the beginning of October may have delayed harvests in the Southeastern part, while for the rest of the harvest conditions remained mixed due to persisting dryness in France.

1 2010-14 Average

MED-Amin Area: Harvest Progress - Corn

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	05/09/2016	54	-2%	100%	100%	10/10/2016	+	+	6.7
France	31/10/2016	1544	-5.8%	79%	na	na	na	-	9.2
Greece	3-11/11/2016	105	-3%	94%	93%	End of Nov. 2016	+	+	11.4
Italy	07/10/2016	658	-9.6%	80%	80%	End of Oct. 2016	+	+	9.3
Lebanon	07/12/2016	2.2	5%	100%	100%	End of Nov. 2016	na	-	3
Portugal	31/10/2016	92	-25%	50%	75%	15/11/2016	+	-	7.8
Turkey	28/10/2016	686	Stable	90%	90%	Oct. 2016	+	+	7.7

na: non available

Trends - MED-Amin countries

As far as corn in the MED-Amin area is concerned, the harvest occurs for a majority of countries in September-October. In Albania, Algeria and in Morocco, this harvest is realized during the summer months while in Spain it extends for the bulk of the harvest between September and March.

- **Albania:** Corn harvests are over in Albania for an expected 380 000t of good quality grains with good yields (7.04 t/ha) following good meteorological conditions in the country.

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

- **France :** Harvests are over at 80% end of October for a total harvested area down 5.8% as compared to last year, with relatively bad meteorological conditions. MARS Bulletin on its part expects yields down 4.2% as compared to last year's (-12.1% as compared to the 5-year average).

- **Greece:** According to the Greek authorities, in the majority of Greek regions, for which data are available, the average quality of harvested grains was good and the meteorological conditions were normal. MARS Bulletin expects yields down 0.9% as compared to last year's (-2.2% compared to the 5-year average).

- **Italy:** Harvests are over at about 80% at the beginning of October on a total harvest area down 9.6%. Observed meteorological conditions were good and gives hope for a good quality of grains. MARS Bulletin forecasts yields slightly down from last year (-0.5%) but superior to the 5-year average.

- **Lebanon:** Corn harvests are over at the end of November, on areas displaying a slight increase. Degraded meteorological conditions for maize have been observed for corn this year.

- **Portugal:** At the end of October, Portugal records a clear recoil of harvest areas (-75%) as well as largely delayed harvests (50% of the harvested areas against 75% at the same time last year). In spite of degraded meteorological conditions, Portugal is expecting good grain quality. MARS bulletin forecasts yield slightly down compared to last year's (-0.3%) but superior to the 5-year average (+1.5%).

- **Spain:** The MARS Bulletin expects yields recoiling weakly from last year's results (0.3%) but still superior to the 5-year average (+1.6%).

- **Turkey:** the corn harvest is over at the end of October. The country expects good grain quality following good meteorological conditions over total areas up 5% as compared to last year. MARS bulletin forecasts yields at 9.17 t/ha (against 9.30 last year), but still progressing against the 5-year average (+9.3%). AMIS forecasts a 6 mln tons production against 6.4 mln tons in 2015/16.

● Global trends - Planting

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). As official statistics for this summer's harvests are still being released at this time and some harvests are still upcoming in certain countries (Southern Hemisphere), we will report in this section the latest estimates for this year's production (2016/17), as well as information on current planting campaigns when available (campaign 2017/18).

● World: On November, 9 2016, USDA forecasts a world level harvest of 144 mln tons against 148.6 mln tons for 2015/16. Among AMIS countries, we observe the following trends:

● European Union (41% of world production¹): Harvests are over in most European countries at the end of September. On Oct. 21, MARS Bulletin forecasted an average European yield superior to the 5-year average by 0.9% (4.76 t/ha) respectively upward and downward for spring (+1.9%) and winter (-1.6%) barley. USDA forecasts a stable level of production at 59.8 mln tons against 61.5 for campaign 2015/16. Winter barley planting is already over for some countries in the region (UK, Poland), whereas they have delayed in a large part of Germany, Benelux countries, and within the North and the West of France, due to soil dryness. In the East, on the contrary, such as in Romania, abundant rain may have impacted planting. In the Southern part of France, in Italy, Spain and Turkey, planting is just starting.

● Russia (11%): The agricultural ministry announced on November 11 that spring and winter barley harvests had been realized for 97% of planted areas, for a total 19.1 mln tons and an average yield of 2.35 t/ha (against 2.53 in 2015). Agricultural and processing organizations' stocks volume are down 10% at the 1.84 mln tons level.

● 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. According to the Agricultural Ministry, the planting campaign for winter barley was over at 83% on November 8, on an all-grains total planted area down by 5%.

● Canada (6%): The Canadian campaign is generally over in 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 stage, USDA forecasts record harvest conditions with a 9.9 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. Confirming this trend, the MARS Bulletin forecasts yields down 10.8 % as compared to last year's and -2.4% as compared to the 5-year average.

● USA (3%): Barley's harvests are over in the US. USDA forecasts a harvest down 500,000 tons at 4.3 mln tons.

¹ 2010-14 Average

MED-Amin Area: Planting Progress - Barley

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	01/10/2016	3,2	+28%	99%	98%	01/11/2016	2.1
Algeria	17/11/2016	1286	+4%	33%	44%	Jan. 2017	1.4
France	31/10/2016	na	na	89%	96%	na	6.4
Greece	3-11/11/2016	114	-2%	53%	50%	End of Dec. 2016	2.9
Lebanon	7/12/2016	1	0%	7%	80%	Feb 2017	4
Portugal	31/10/2016	21	Stable	0%	0%	31/01/2017	1.6
Tunisia	28/10/2016	666	+25%	4%	na	na	1.3
Turkey	28/10/2016	2770	Stable	95%	95%	March 2017 (spring)	2.4

na: non available

Trends - MED-Amin countries

A majority of winter barley produced in the Mediterranean area is sown in October-November, with the exception of Portugal where planting is realized in January. It should be noted however that spring barley planting is realized in France in February-March, in Egypt in April-May. In Spain barley planting is realized continuously between October and March.

- Albania: Barley planting is over on total areas that have been stable for a few years.
- Algeria: Barley planting has been somewhat delayed this year in Algeria (33% against 44%) on stable anticipated total areas.
- France: On Oct 31, barley planting is characterized by some delay (89% against 96%) potentially caused by soil dryness.
- Greece: At the beginning of November, sowing in Greece is over by about 50% in line with last year on a stable total area. In most of Greek regions from which data are available, the meteorological conditions were suitable for sowing. However, in some regions there was a delay in the beginning of sowing, due to inappropriate weather conditions (continuous rainfall or lack of rainfalls).
- Lebanon: Barley planting is usually over in February and was characterized this year by important delays, on stable planted areas.
- Portugal: Barley planting has not yet begun in Portugal at the end of October. Currently soils are being prepared for the next planting season.
- Tunisia: At the end of October planting are only starting on a total area reported to have increased by 25% as compared to last year.
- Turkey: On Oct 28, planting is over for the bulk of the Turkish barley. Some spring barley will however be planted in March.

● Global trends - Harvest

From a FAO estimate perspective, it is considered that about 2/3 of the accounted production for the 2015/16 campaign is realized at the end of October.

- World: For the largest producers, USDA forecasts records production at 483 mln tons against average levels oscillating between 472 and 478 in 2012-15.

- China (22% of world production¹): At the end of October, it is estimated that China has produced about 90% of the harvest that will be accounted for in the 2015/16 campaign. USDA forecasts a 146.5 mln tons production against 145.8 mln tons in 2015/16. AMIS gives us the following forecasts: 144.5 mln tons (2016/17) against 143.8 (2015/16).

- India (17%): It is generally considered (FAO, USDA) that the Indian campaign starts in October. At this stage, the realized harvest should be about 20% of the total area accounted for 2016/17. USDA forecasts a production at about 106.5 mln tons against 104.3 mln tons in 2015/16. AMIS: 107.7 mln tons (2016/17) against 103.4 mln tons (2015/16).

- Indonesia (7%): More than 90% of the annual rice production is produced between January and October included. 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 34.5 mln tons for 2016/17.

- Vietnam (5%): Rice harvests in Vietnam are over or almost at the end of October. USDA forecasts a stable production at about 28 mln tons. AMIS: 29.8 mln tons (2016/17) against 29.4 (2015/16).

The evaluation of crops proposed in November 2016 by GEOGLAM, within AMIS Market Monitor, points towards relatively favorable conditions for all covered countries. However, crop conditions remain under the "Watch" status for about half of the harvests Vietnam. In China, late rice (about 1/5 of the total) are expected with lower quality than average as a consequence of the sustained rains observed in the country and of the recent typhoon that passed through the South of the country. In Thailand, harvest conditions have improved significantly due to recent rains. Additionally, the damages successive to flooding in the north/northwest of the country are considered to be minors.

1 2010-14 Average

MED-Amin Area: Harvest Progress - Rice

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)
France	31/10/2016	14	-1.2%	na	na	na	na	-	5
Greece	3-11/11/2016	32	+2%	84%	100%	End of Nov. 2016	+ / ++	+ / ++	7.8
Italy	12/10/2016	234	+3.1%	100%	100%	Over	na	na	6.5
Portugal	31/10/2016	29	-25%	50%	75%	15/11/2016	+	-	5.9
Spain	19/12/2016	109	Stable	100%	na	na	na	na	7.7
Turkey	28/10/2016	116	Stable	90%	90%	Oct. 2016	+	+	8.1

na: non available

● Trends - MED-Amin countries

For the majority of the MED-Amin area, the rice harvest usually extends between September and November.

- France: Total planted surfaces are slightly down this year (-1.2%). Meteorological conditions are reported to be degraded this year. However, MARS Bulletin forecasts yields far superior to last year's (+16,7) and above that of the 5-year average (+3%).

- Greece: The Greek authorities report Good to Excellent growth conditions and expect good grain quality. However, in certain regions, low selling prices last year and during the current year might affect crop areas. The yields expected by MARS are conform to last year's results and still a little under the 5-year average (-1.5%).

- Italy: On Oct 13, harvests are over on planted areas displaying a small increase in size (+3.1%). MARS forecasts good yields in the country as compared to last year (+4.5%) and to the 5-year average (+3%).

- Portugal: On Oct 31, Portugal reports harvest delays (50% against 75% last year) on recoiling total areas (-25% as compared to las year). In spite of reported degraded meteorological conditions, Portugal expects good grain qualities. MARS forecasts yields down against last year (-3.7%) but above the 5-year average.

- Turkey: The rice harvest is over in Turkey at the end of October on total areas that have been stable for the last four years. Following good meteorological conditions, the quality of grains is expected to be goof. AMIS forecasts a stable 0.55 mln tons production in 2016/17.



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