

European Union: Favorable Conditions for 2018/19 Crops but Rainfall Dampens Prospects in North

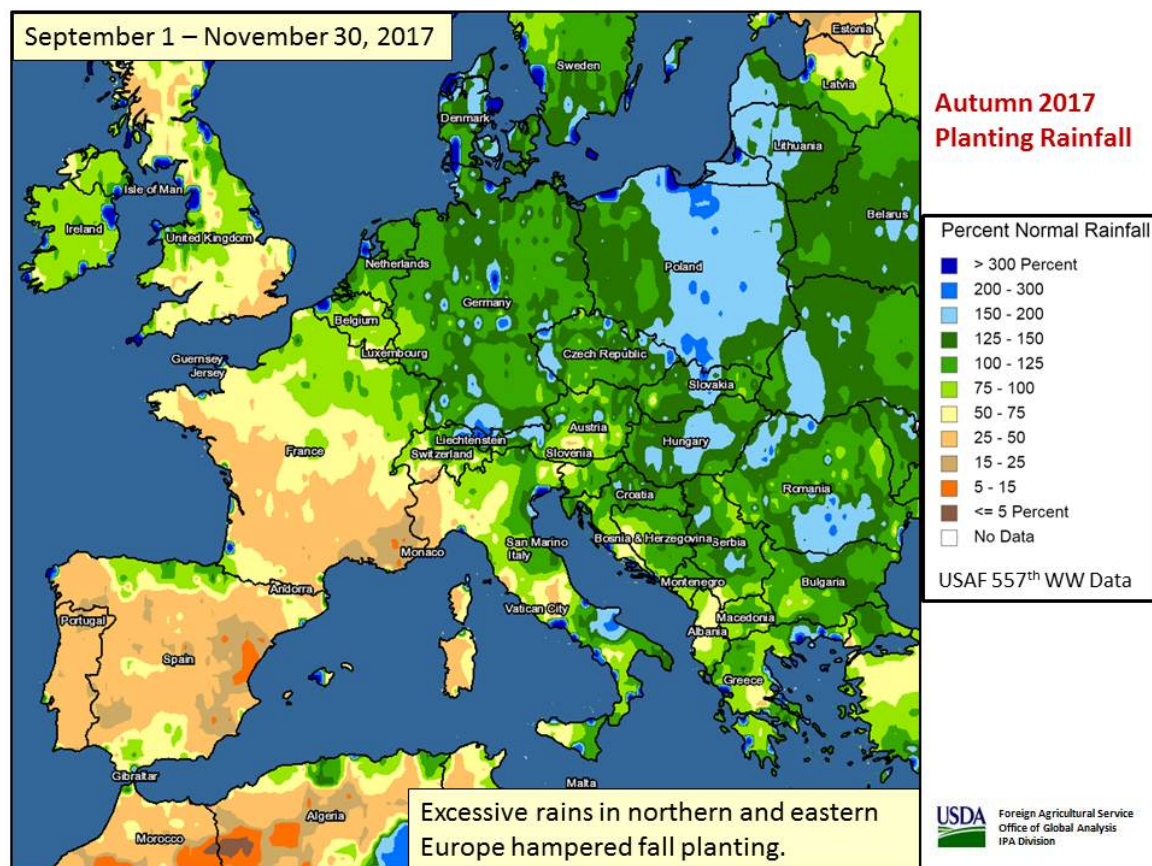


Figure 1.

Conditions in the European Union are generally favorable for 2018/19 crops planted in autumn 2017; however, rainfall was excessive in some locations, especially in areas of the northern wheat and rapeseed belt. (See figures 1, above, 2 and 3, attached) This area includes crops in Poland, Germany, Denmark, Netherlands, Baltics and Scandinavia, which experienced heavy autumn and winter rains. The resulting disruptions in fieldwork extended the autumn 2017 harvest, which delayed fall plantings for 2017/18 crops in central and eastern Europe. To offset the reduction in lost winter area, some of the waterlogged fields will be replanted with spring crops, primarily corn, barley, and sunflower. Conditions in France, Germany, the United Kingdom (UK), and Poland drive overall EU wheat and rapeseed production as these are the four largest wheat and rapeseed producers, accounting for approximately 65 percent of the wheat and 76 percent of the rapeseed production. The vast majority of the EU's wheat and rapeseed crop is autumn sown. (See figures 4 and 5.) Crops have now broken dormancy in France, the UK, Germany, and the Balkans and are losing winter hardiness elsewhere.

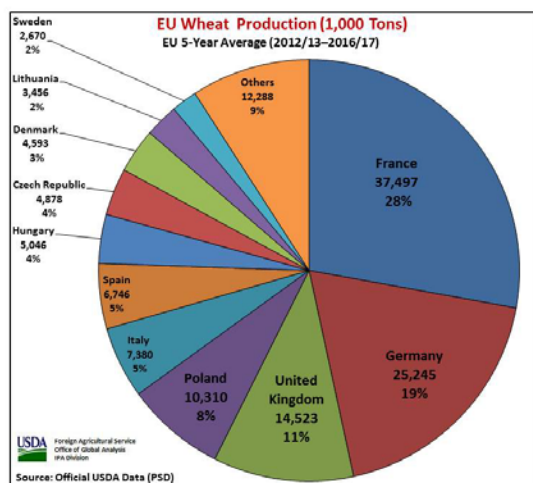


Figure 4.

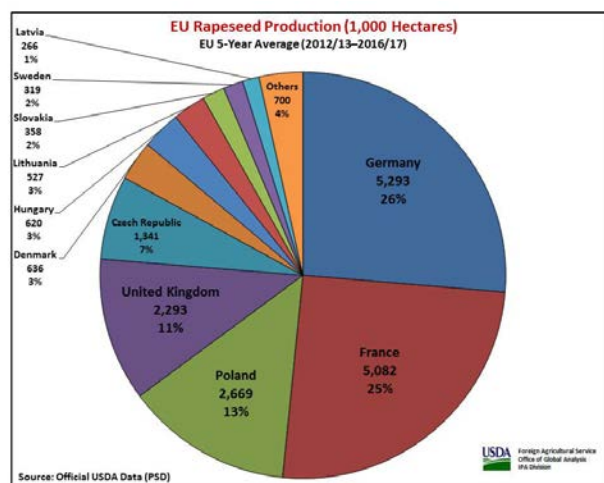


Figure 5.

Depending on the climate of the region, autumn-planted crops typically start dormancy between November and January in the European Union (EU). This season, a mild autumn and early winter delayed plant dormancy, accelerated vegetative growth, and has kept plants susceptible to freeze damage. By mid-February however, winterkill temperatures had been practically nonexistent. (See figure 6.) Moreover, protective snowcover had been infrequent but also largely unnecessary as temperatures were much higher than average. Heavy rains were common and widespread during early winter. An area of concern due to heavy rainfall in March is France, where dry days are needed for plants to resume vegetative activity.

During late February, low temperatures and snowfall covered much of Europe as weather associated with an arctic cold front popularly named “the Beast from the East” put a chill on the continent. Although highly publicized due to heavy snows in Ireland, the UK, and France, and the freezing of Amsterdam’s famous canals, winterkill concerns were primarily limited to Poland, eastern Germany and the Czech Republic. (See figure 7, attached.) At this point, however, no widespread damage reports have been issued but official assessment of damage may take until spring when crops green-up. The intrusion of cold air at the end of February reduced the increasing concerns for pest-related problems that had been building after a warm and wet early winter. (See figure 8.)

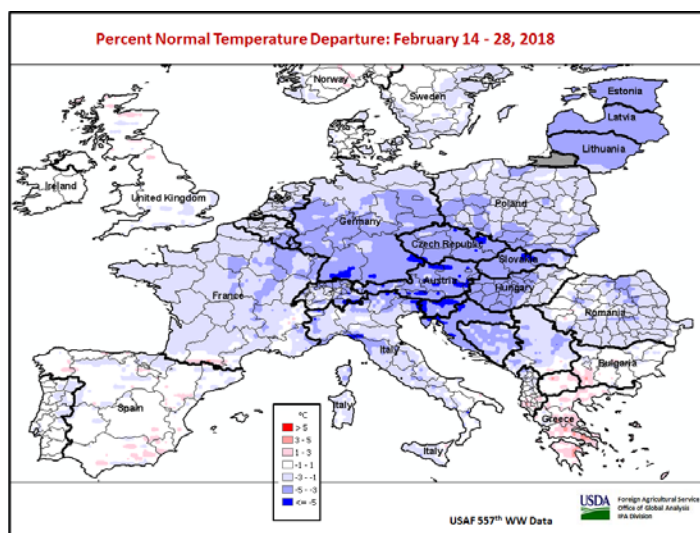


Figure 8.

One country that had been struggling with drought was Spain, one of the EU’s largest barley producers. During fall planting, drier-than-normal conditions were experienced, which delayed sowing activities and raised concerns. Rainfall, however, increased significantly during December and January, allowing planting and emergence to occur during the latter portion of Spain’s wide planting window. (See figure 9.) Rainfall continued during late winter and into March, improving moisture levels. The wheat crop in southern Spain is usually the EU’s first to be harvested and it should now be in good condition due to favorable rainfall. Further

north, conditions were favorable with average levels of winter rainfall recorded in the UK and France. In addition, rainfall during autumn helped replenish soil moisture levels in Italy, a large EU wheat producer, which had also struggled with drought last year.

As of March 23, the EU Commission forecasts total EU wheat production for 2018/19 to be down 1.2 million tons from 2017/18. The Commission forecasts 2018/19 rapeseed production up 0.5 million tons with an increase of 0.1 million hectares over 2017/18. The German Statistical Agency reports both lower national 2018/19 rapeseed and wheat area as compared to 2017/18 due to persistent and excessive rains, but recently released data from the country's farm cooperatives association has winter rapeseed production up 10 percent from last year. In a report published by the UK's Agriculture and Horticulture Development Board last autumn, low incidences of flea beetle damage and improved rapeseed margins suggest an increase in national rapeseed area in the UK, but at the same time wheat area is expected to drop by two percent. A trend in the last several years towards planting more spring barley in the UK is likely to continue in order to increase crop rotation and avoid encouraging invasive black grass, caused when wheat is repeatedly planted on the same field. As of March 19, the French farm office, FranceAgriMer, reported that 79 percent of the national soft wheat crop was in good or excellent condition.

USDA estimates for total EU wheat and rapeseed (for the last 10 years) can be seen in figures 10 and 11 (below).

Initial USDA global crop-production estimates for 2018/19 will be released on May 10, 2018.

Current area and production estimates for grains and other agricultural commodities are available on IPAD's World Agricultural Production (WAP) circular at <https://ipad.fas.usda.gov/> as well as on the Production, Supply and Distribution Database (PSD Online) at <https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home>

For a breakout of USDA's released area, yield, and production estimates by commodity within the European Union, please go to the PSD Online Data Sets and select the zipped file for "*EU Countries Area & Production.*"

Additional weather data can be found on Crop Explorer at <https://ipad.fas.usda.gov/cropexplorer/>

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Figure 1.

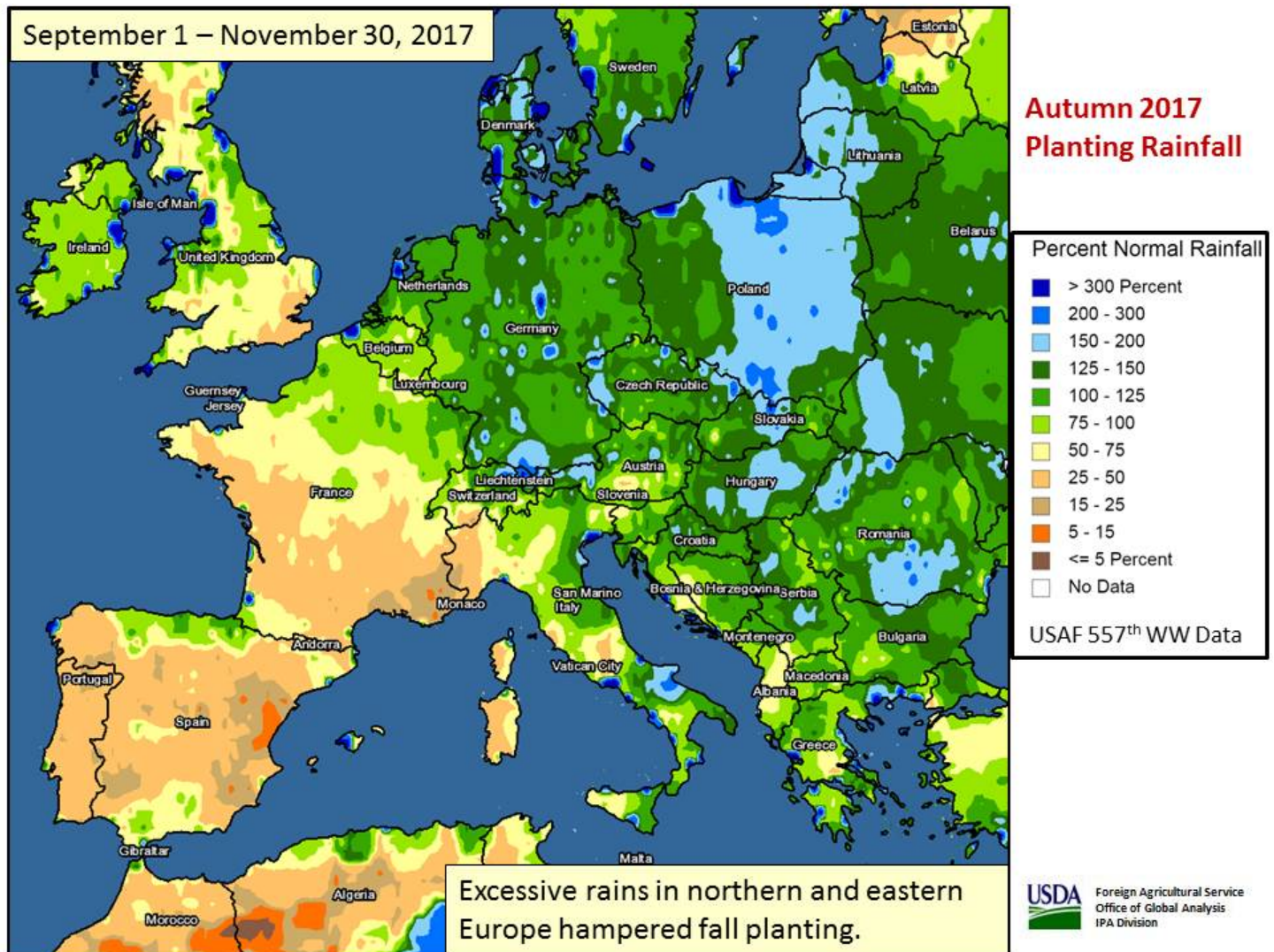


Figure 2.

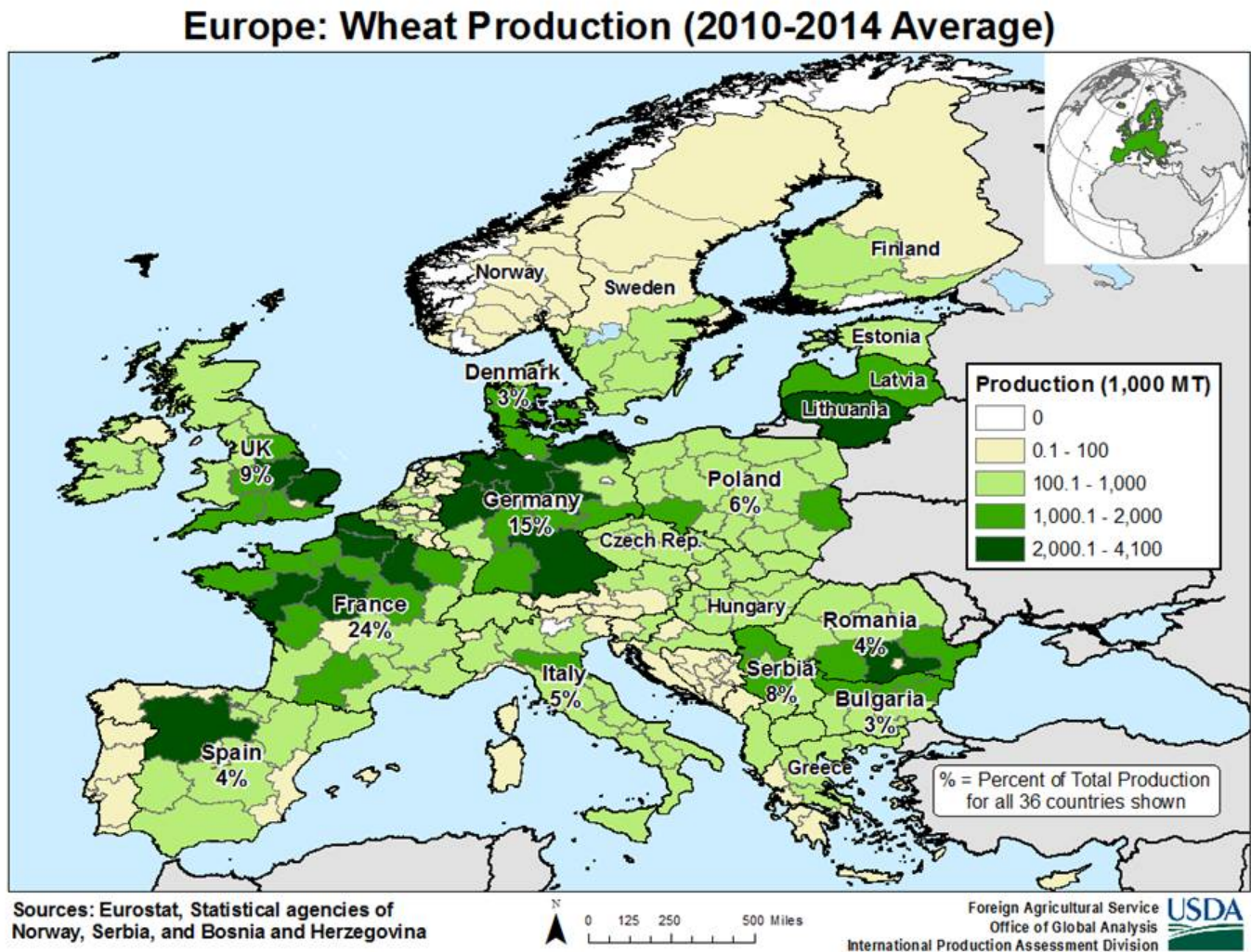


Figure 3.

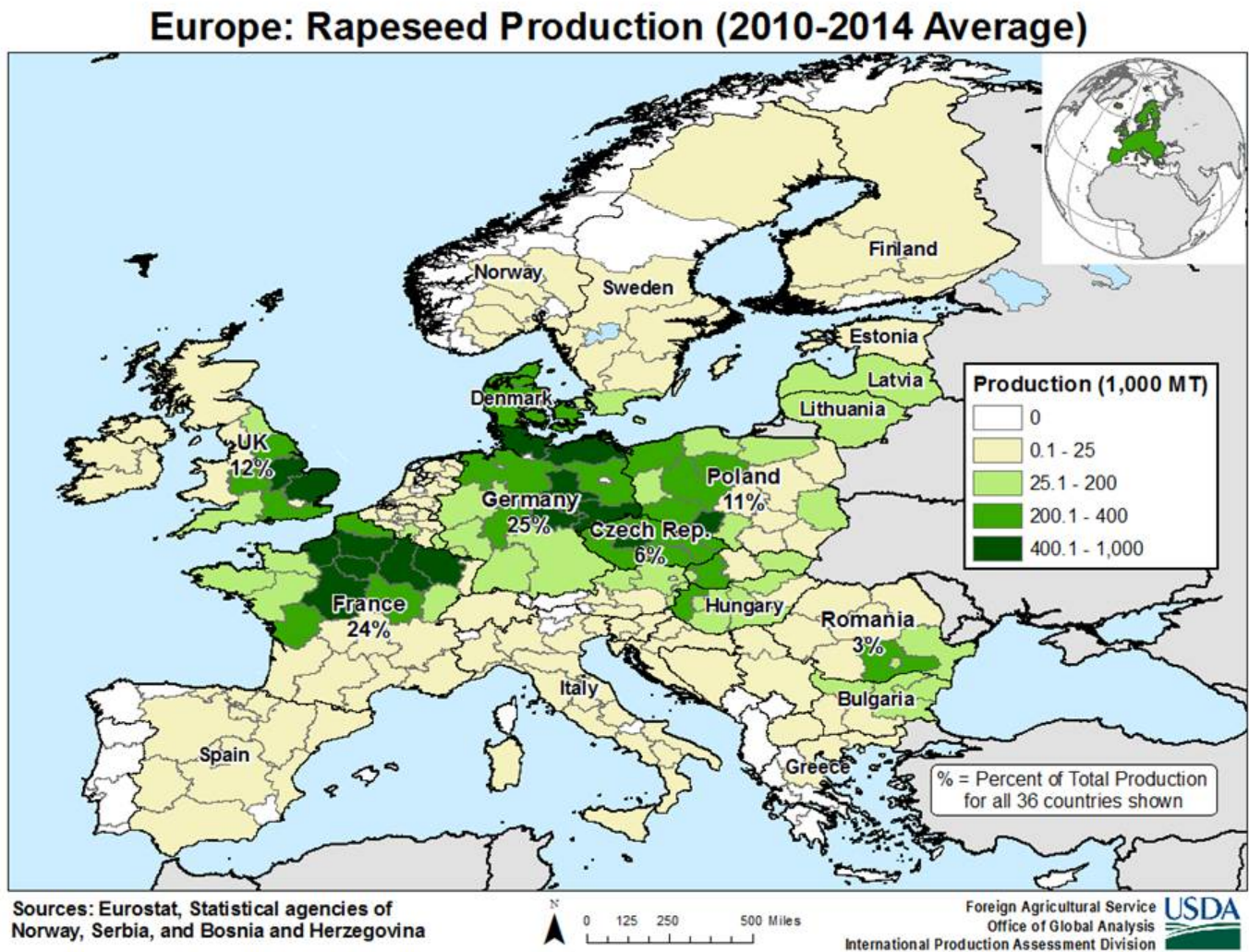


Figure 4.

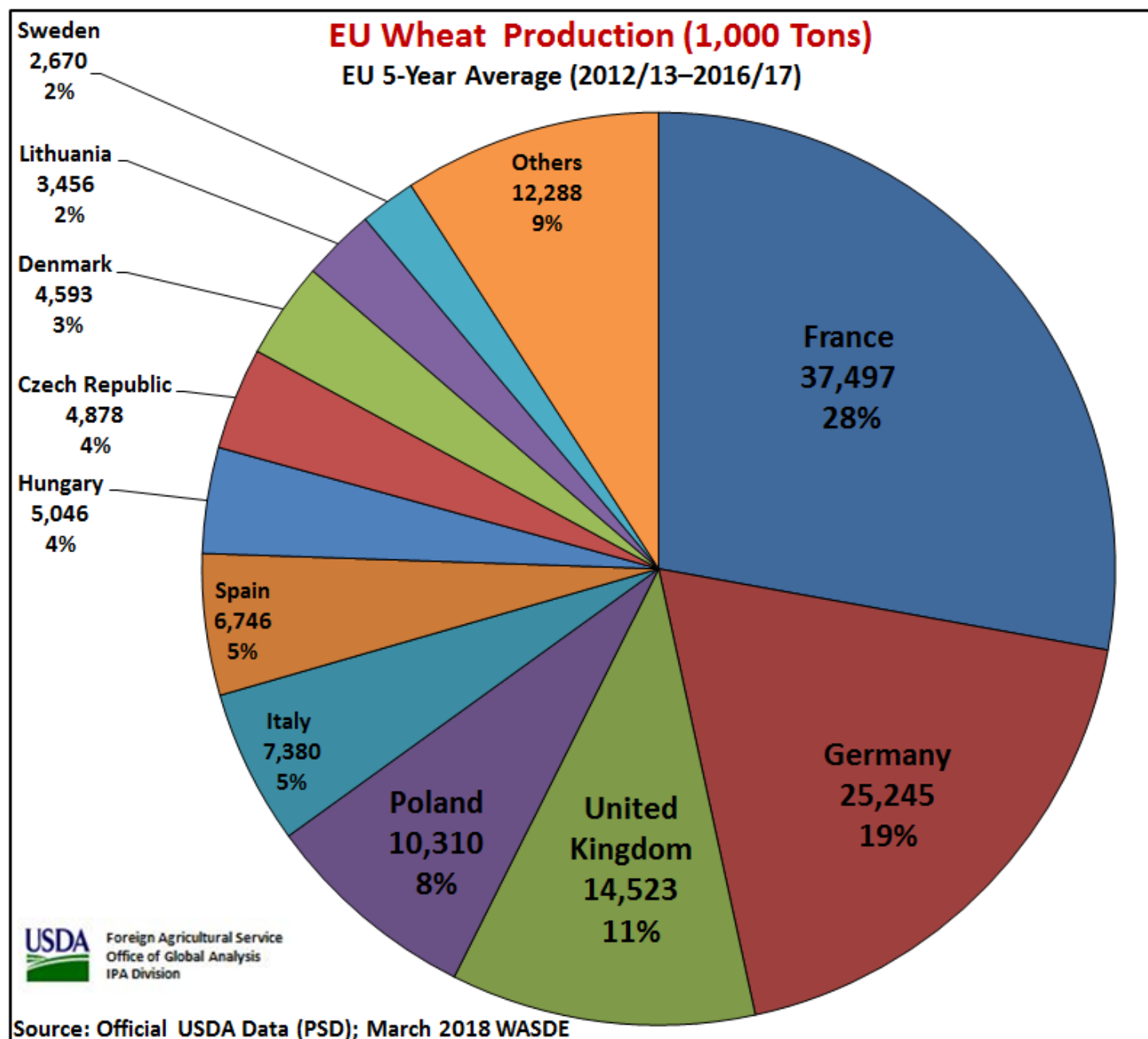


Figure 5.

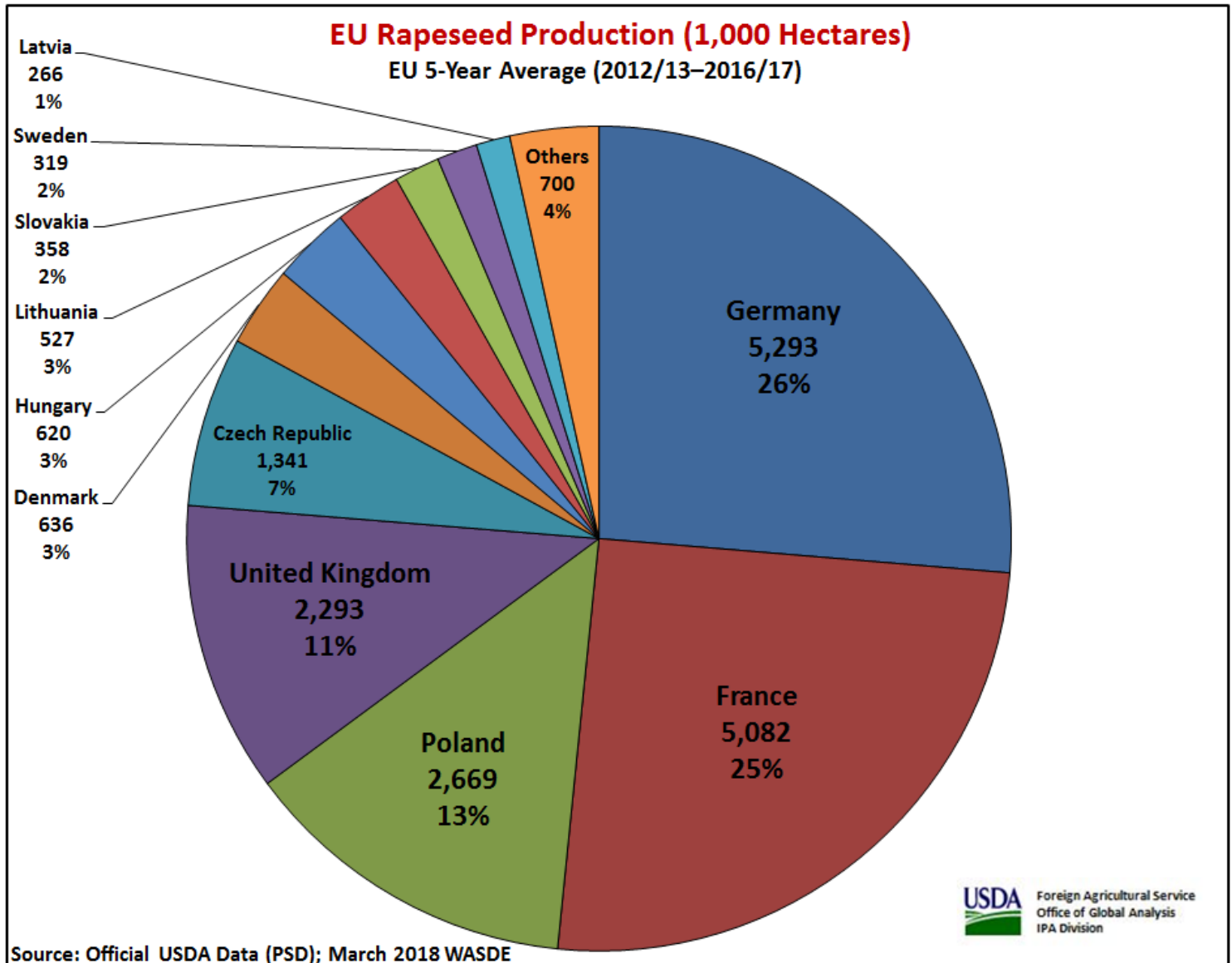


Figure 6.

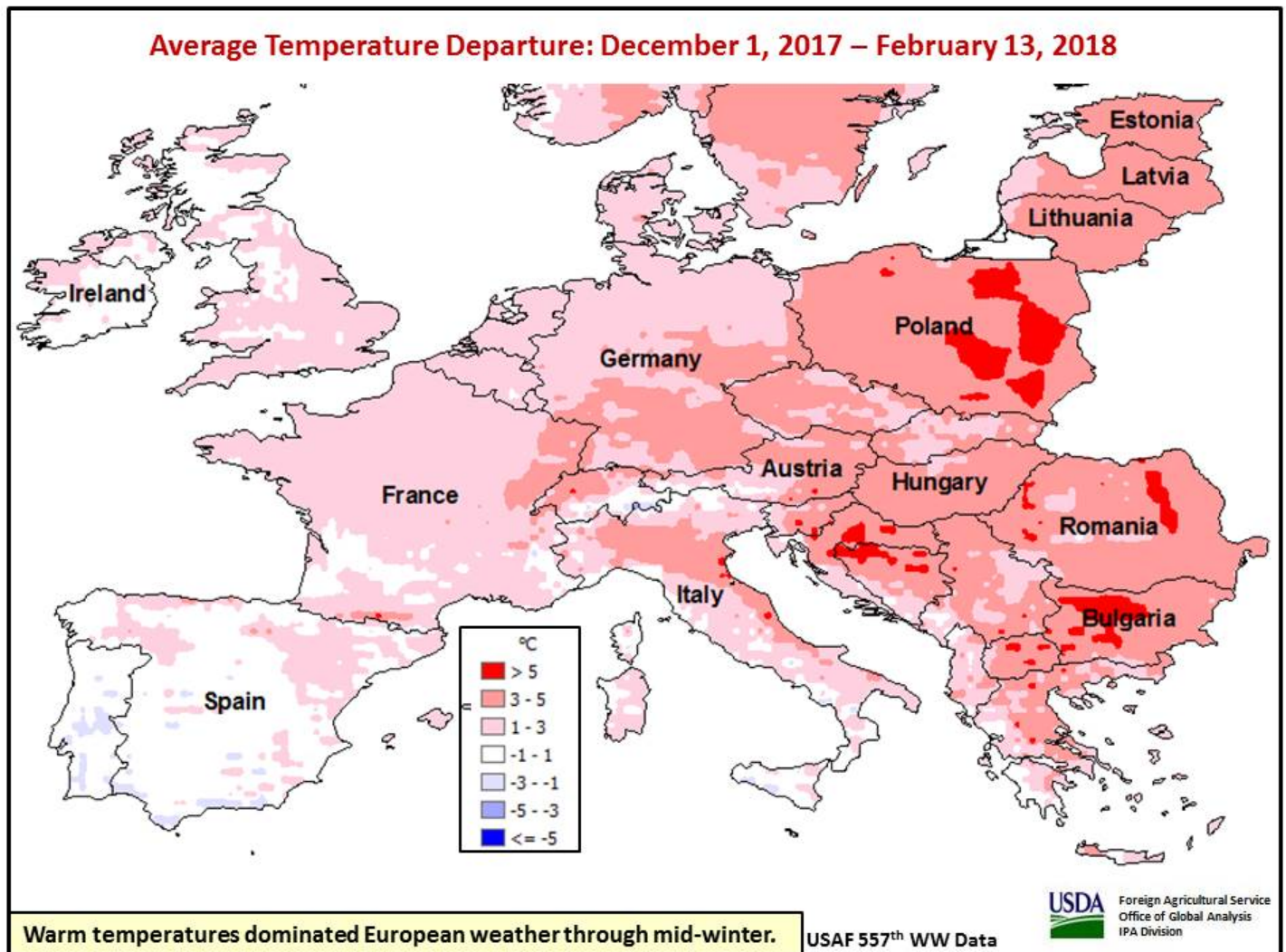


Figure 7.

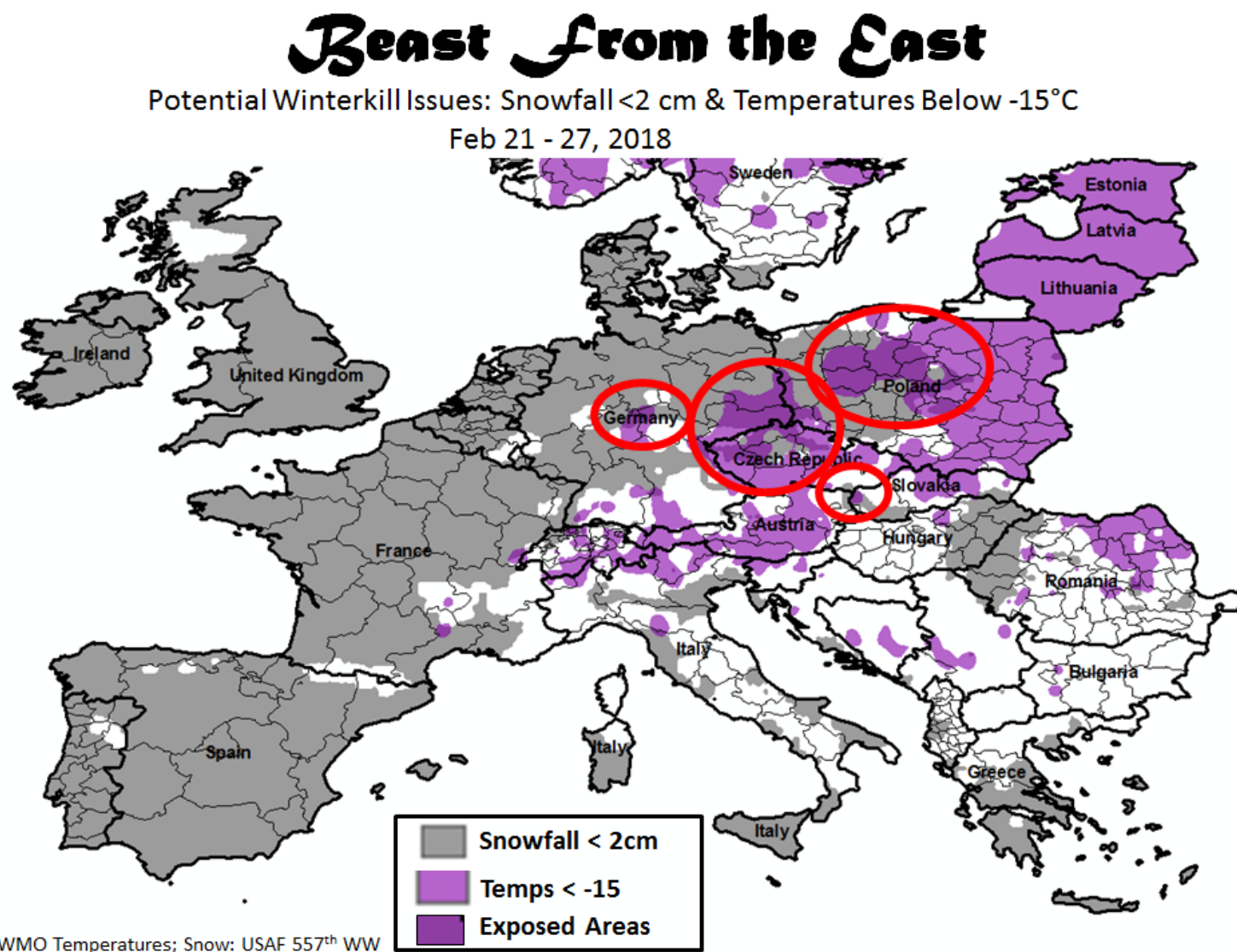
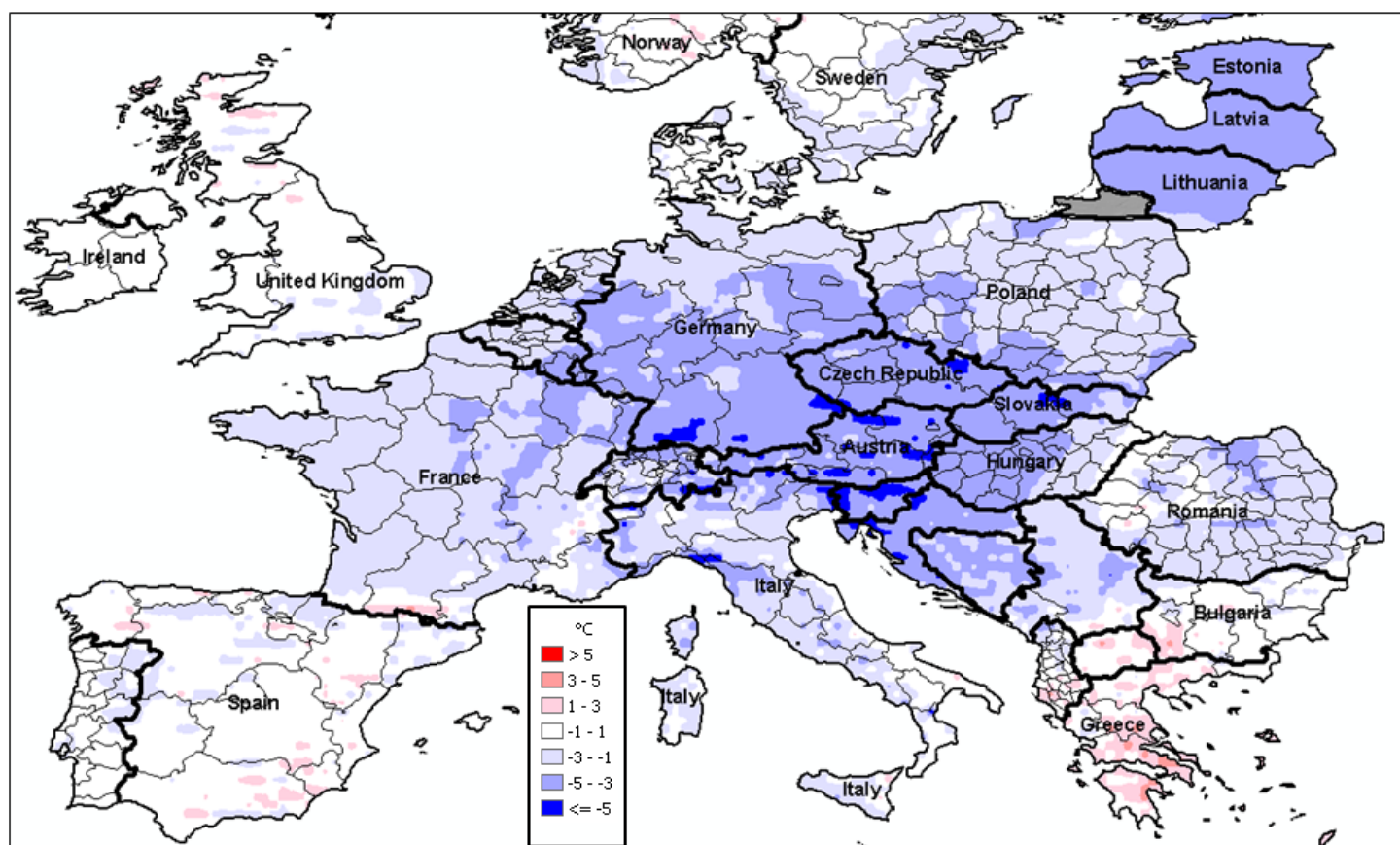


Figure 8.

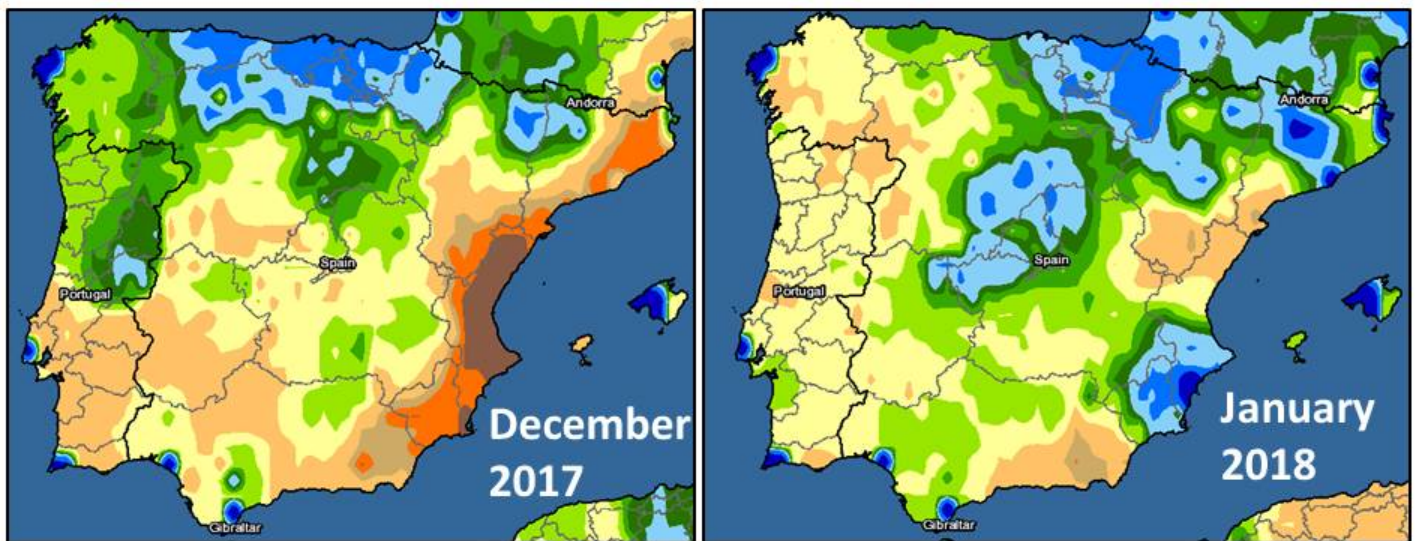
Percent Normal Temperature Departure: February 14 - 28, 2018



USAF 557th WW Data

Figure 9.

Spain: Early Winter Precipitation Benefitted Winter Wheat and Barley
Drought conditions diminished while reservoirs began to refill after an extended dry period.



USAF 557th WW Data

USDA Foreign Agricultural Service
Office of Global Analysis
IPA Division

Percent Normal Rainfall

- > 300 Percent
- 200 - 300
- 150 - 200
- 125 - 150
- 100 - 125
- 75 - 100
- 50 - 75
- 25 - 50
- 15 - 25
- 5 - 15
- <= 5 Percent

Figure 10.

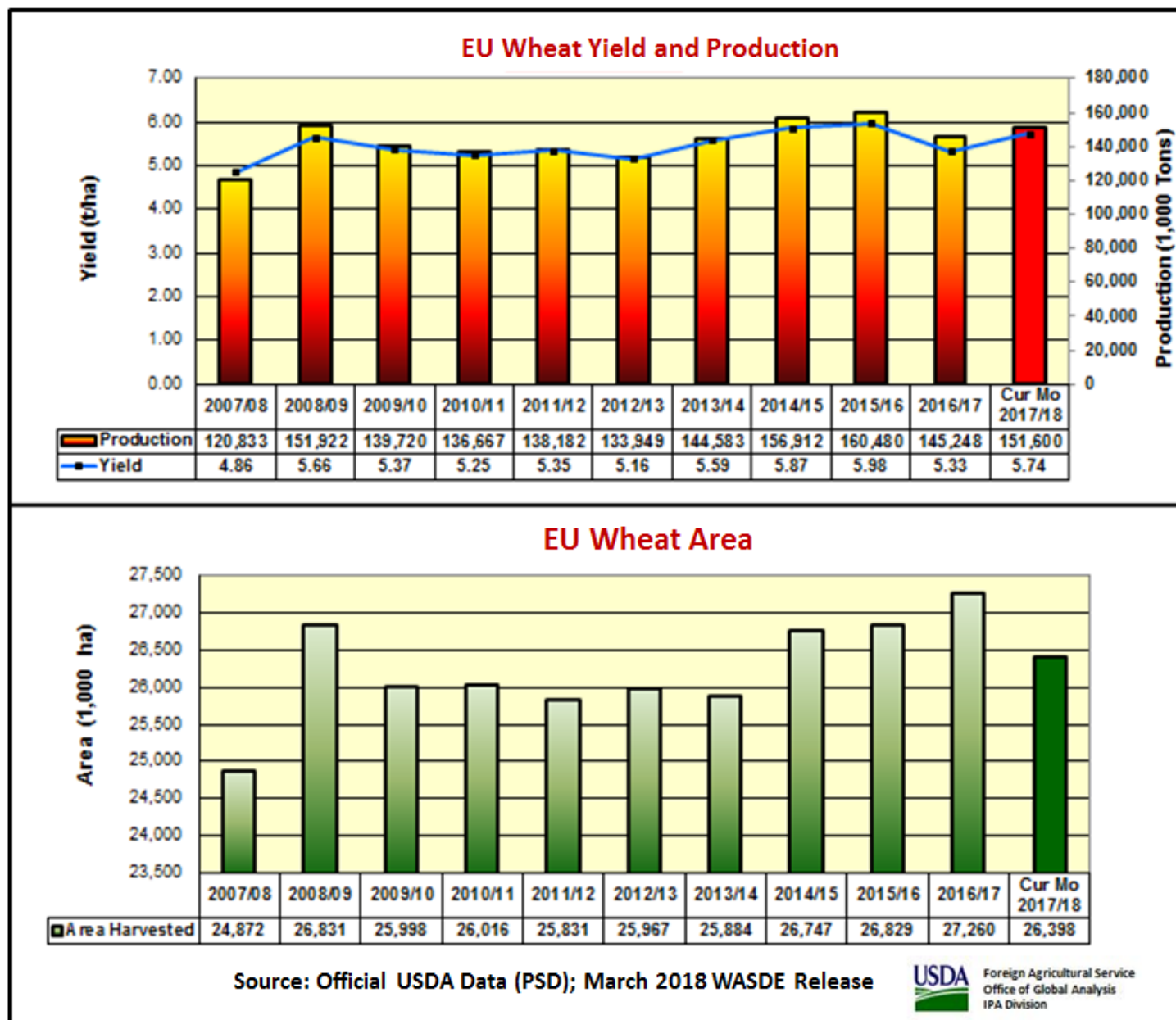
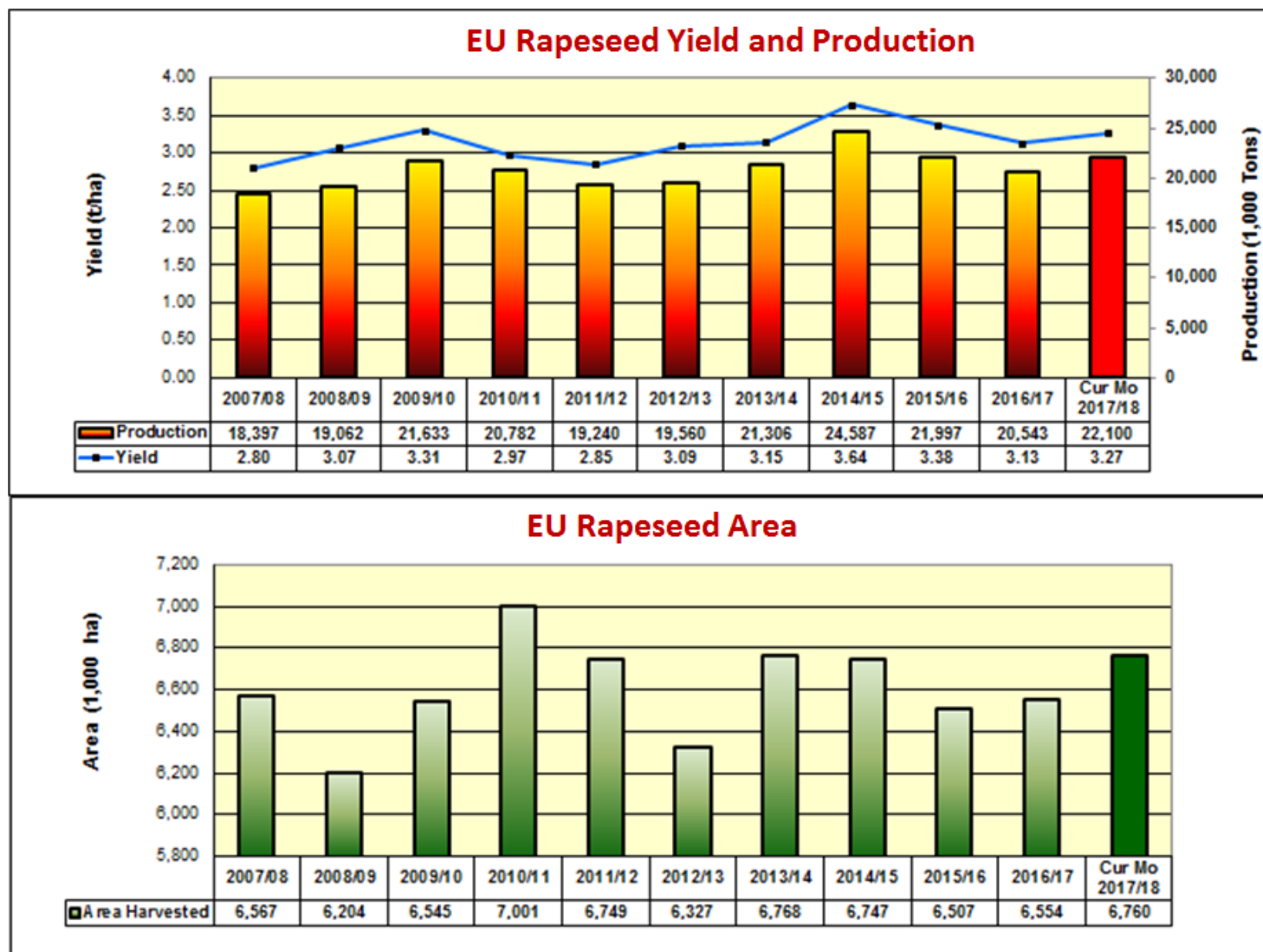


Figure 11.



Source: Official USDA Data (PSD); March WASDE Release