

**Foreign Agricultural Service**

Global Market Analysis

International Production Assessment Division

Web: <https://ipad.fas.usda.gov>

**September 28, 2021**

# Commodity Intelligence Report

## EUROPEAN UNION WHEAT AND RAPESEED: LATE HARVESTS BUT RECORD WHEAT YIELD

### Wheat

Despite numerous weather-related problems, record wheat yields are expected for European Union (EU) wheat. The 2021 EU wheat harvest occurred much later than usual this year. The slow pace of the MY 2021/22 winter crop was due, in large part, to below-normal temperatures in April and May (Figure 1), delaying early crop development. In addition, unfavorable dryness spread across much of the western European grain belt during March and April (Figure 2). Temperatures during June, July, and August, were average to above average, pushing crop development forward and thus regaining some of their delayed progress. A heat wave in late June shortened the grain fill period, lowering yield potential, particularly in western Poland, eastern Germany, and northwest France. During July, moderate to heavy rains inundated areas of eastern France and western Germany, causing significant flooding, lodging, and widespread fieldwork delays (Figure 3). Due to the heavy summer rains in western Europe, wheat quality suffered with the spread of fusarium and other fungal diseases. USDA estimates that the EU MY 2021/22 wheat crop will be significantly above the previous season's small crop, which had experienced a large reduction in planted area due to excessive autumn planting rains.

The EU's MY 2021/22 wheat harvest is estimated at a bumper 139.0 million tons (mmt) from 23.9 million hectares (mha), and with a record 5.81 ton per hectare yield (t/ha). The year-to-year increase is 13.1 million tons or 10 percent above 2020/21, and 6 percent above the 5-year average. Area is estimated to be 4 percent higher than what was achieved during the previous season's challenging planting conditions, but 1 percent below the 5-year average. Yield is estimated at 5.81 t/ha, 6 percent above last year and 7 percent above the 5-year average. For a chart of EU wheat estimates please see (Figure 4).

Harvest finally finished at the end of August in France, its latest harvest in about 10 years. Many reports indicate the presence of quality issues in France, the EU's biggest wheat producer, including with its durum crop. These issues largely stemmed from the excessively wet weather in July. A higher percentage of feed-quality wheat is expected in much of the traditional growing areas of northwest Europe.

In Spain where dryness was particularly acute, the cooler spring prevented more significant production losses because water requirements were lower than usual. Some

areas in Spain, such as the southern durum-growing region of Andalucía were especially dry, lowering yields.

Larger wheat crops in Romania and Bulgaria are the result of above average, favorable rains during spring and summer, particularly in the main production areas along the Danube River and the Black Sea Coast. Unlike the damp, maritime-influenced northwestern areas of Europe, increased rainfall in the warmer Balkan countries is often very beneficial to crops. Satellite-derived, MODIS Normalized Difference Vegetation Indices (NDVI) of the region depict near-record vegetation health during the June peak of winter crops along the Danube River. The winter crop in this area is primarily wheat. During dry-down of the winter crops, NDVI rapidly dropped because the summer crops of corn, sunflowerseed and soybeans, that should be approaching peak greenness and vitality in July and August, were suffering from extreme temperatures and dryness (Figure 5). In Italy and south-central Europe, heat and dryness reduced winter wheat yields across the region, including in Hungary, Croatia, and the neighboring non-EU countries of Serbia and Bosnia and Herzegovina.

Wheat is grown throughout Europe. For a map showing 2021 wheat production by country please see Figure 6.

## Rapeseed

Rapeseed is the dominant oilseed in the EU. In Europe, it has a similar growing season as wheat except that it is shifted slightly earlier, and it has a narrower planting window. Autumn sowing begins in late August and lasts into mid-September. Rapeseed overwinters and breaks dormancy in spring, with harvest typically occurring in late June or early July. The vast majority of rapeseed in the EU is autumn sown versus a very small amount of spring sown varieties. The largest rapeseed producing countries in the EU are Germany, France, and Poland. The UK was previously included in the EU top 5, but it is treated separately due to BREXIT. For a map showing production by country please see Figure 7.

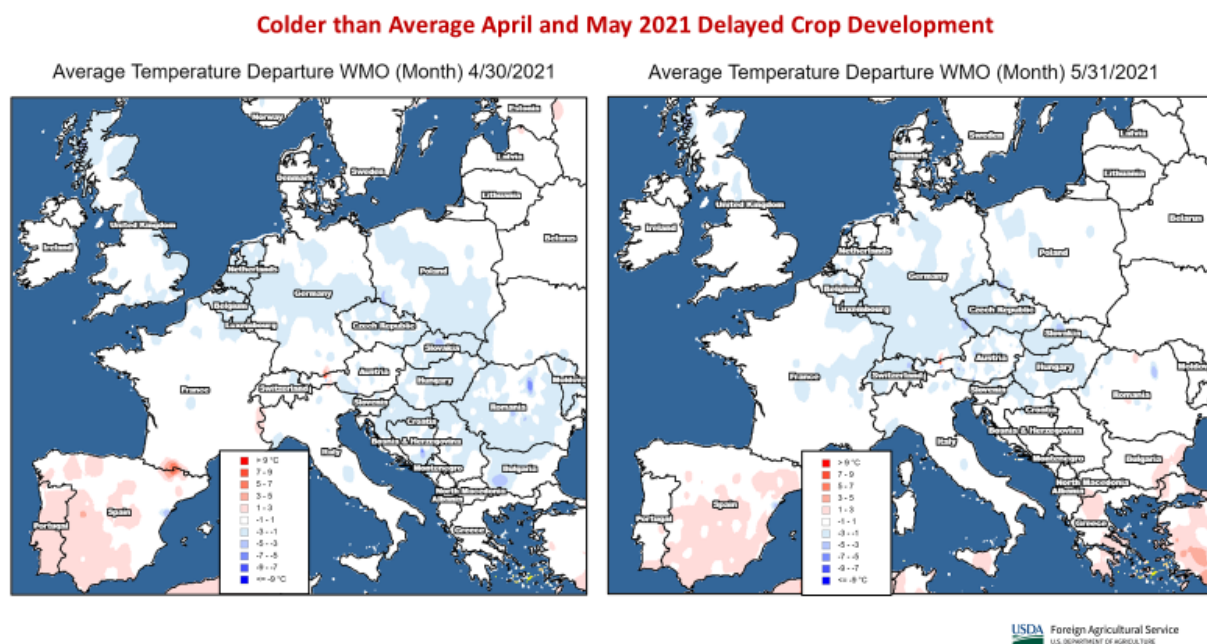
EU rapeseed production is estimated at 16.8 mmt, up 0.6 mmt or 3 percent from last year. Area is up 1 percent from last year to 5.2 mha, and yield is up 2 percent to 3.21 t/ha. Area is down 10 percent from the 5-year average and yield is 5 percent above the 5-year average. For a chart of EU rapeseed estimates please see Figure 8.

While EU rapeseed area is up marginally compared to last season, it remains significantly below the higher acreage achieved 5 to 10 years ago when area was often above 6.0 mha. Long-term rapeseed acreage has stagnated or decreased in much of the EU because of bans on the previously widely used neonicotinoid insecticides and other inputs. The ban on neonicotinoid insecticides resulted in higher production costs, lower yields, and an increase in incidence of the cabbage stem flea beetle which affects rapeseed pods. Farmers have fewer input options and often must pay more for less effective inputs. Restrictions vary among EU countries, however.

France's harvest was delayed so long that the final stages of the MY 2021/22 rapeseed harvest occurred simultaneously with the planting of the MY 2022/23 rapeseed crop. France, typically the first or second largest rapeseed producer in the EU (alternating with Germany), had particularly low MY 2021/22 planted area due to drought during the sowing period last autumn. Meanwhile, Germany and Poland are expecting good yields (but slightly lower than last year), as drought largely avoided north-central Europe during the 2021 season, but heat during June did cap yields from going higher. Rapeseed is grown throughout Europe but concentrated in the northern countries where the climate is cooler and more humid.

For country-specific area, yield, and production estimates within the European Union- (EU), please go to PSD Online at:

<https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home> and select "Downloadable Data Sets" and choose the zipped file for "EU Countries Area & Production."



**Figure 1. Average Temperature Departure from Normal (April 2021 on left) (May 2021 on right).  
Source: WMO Station Data**

## March and April 2021 Moisture

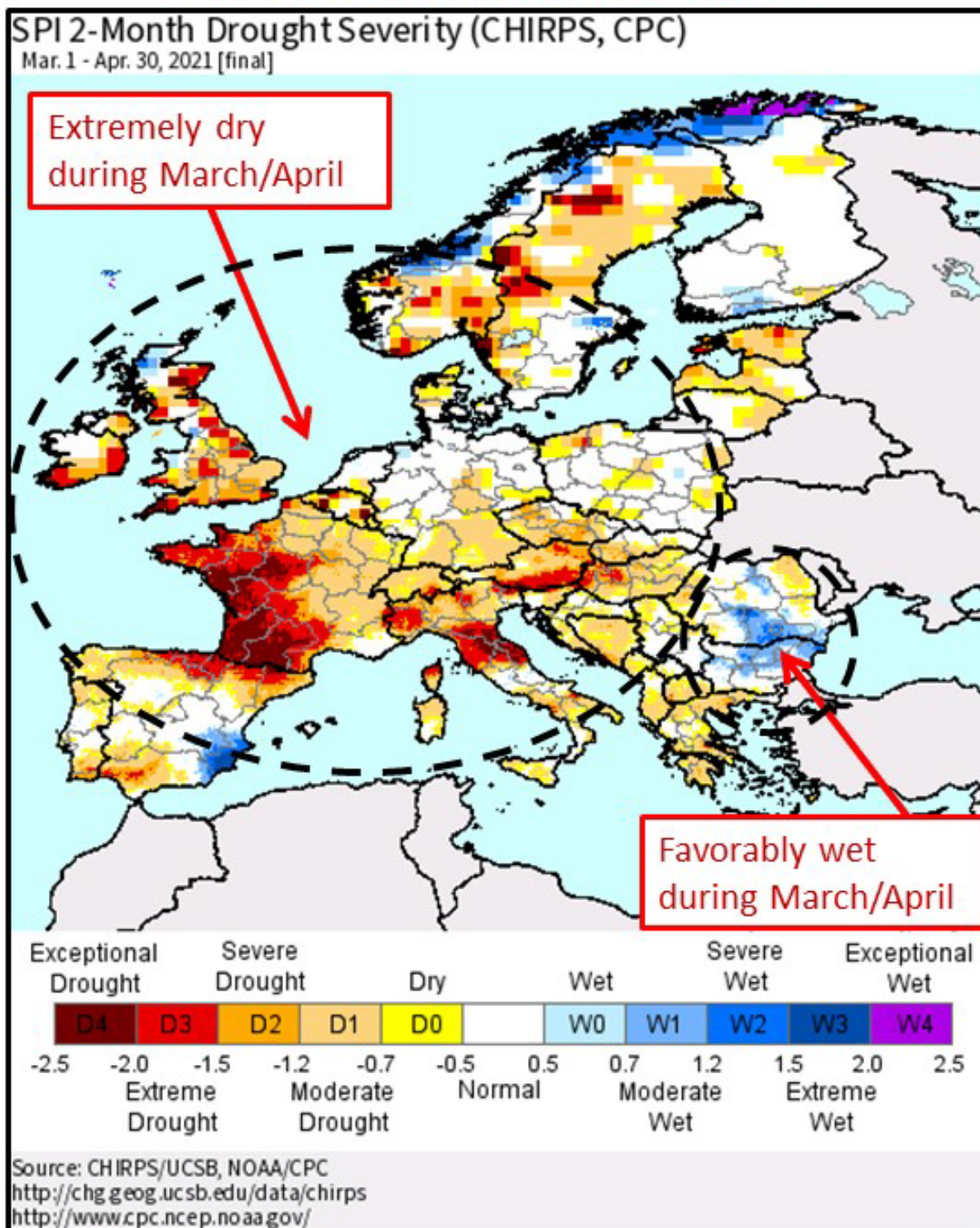


Figure 2. Moisture Received During March and April 2021. Source: UC Santa Barbara, Climate Hazards Center, Climate Hazards Group InfraRed Precipitation with Station data (CHIRPS) and NOAA CPC

## June and July 2021 Moisture

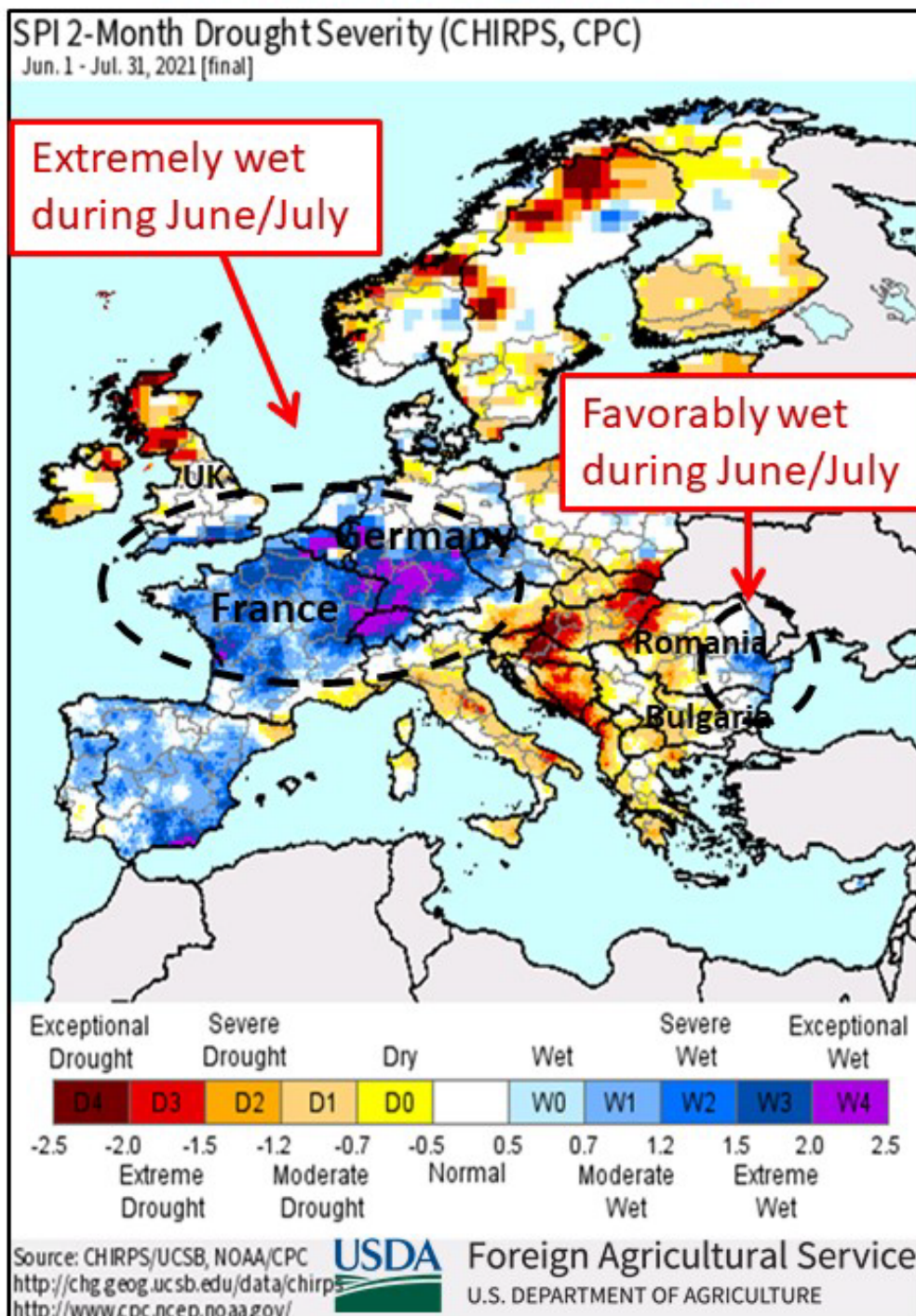
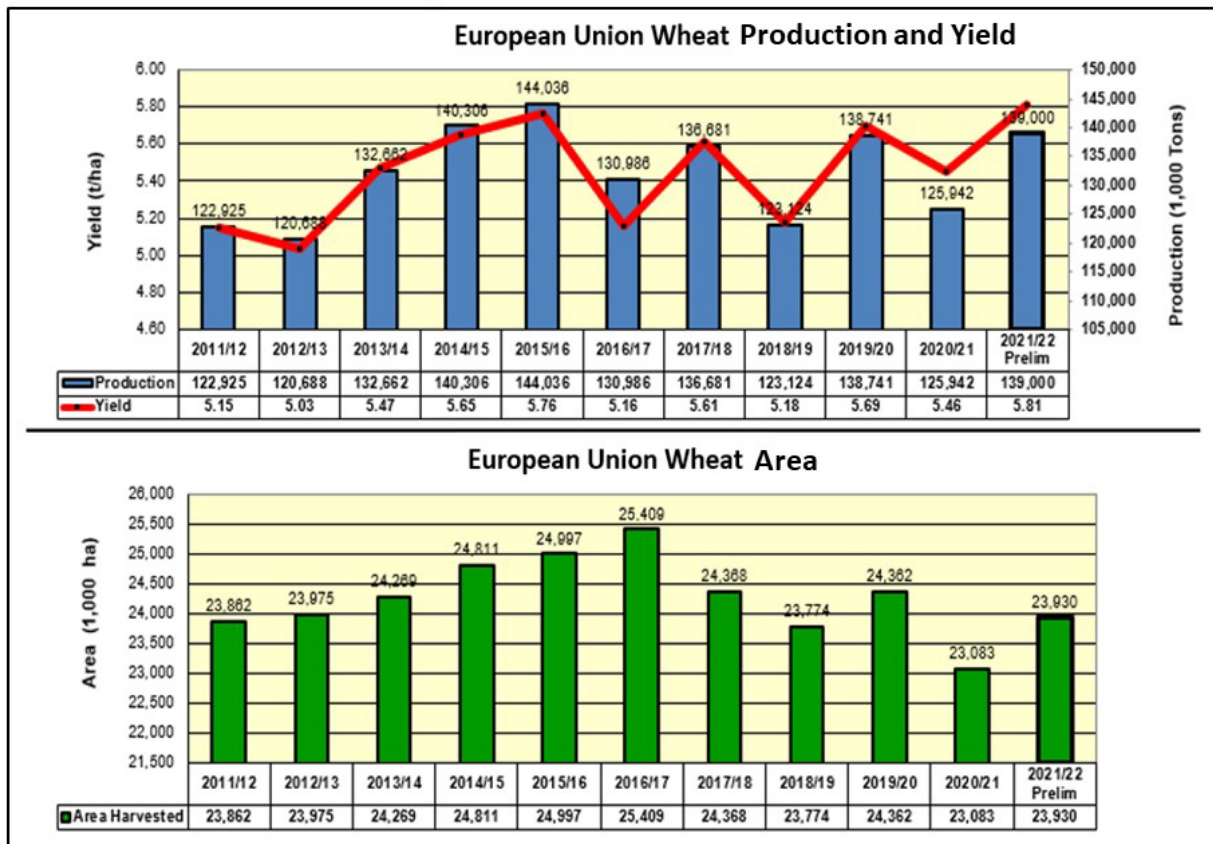


Figure 3. Moisture Received During June and July. Source: UC Santa Barbara, Climate Hazards Center, Climate Hazards Group InfraRed Precipitation with Station data (CHIRPS) and NOAA CPC

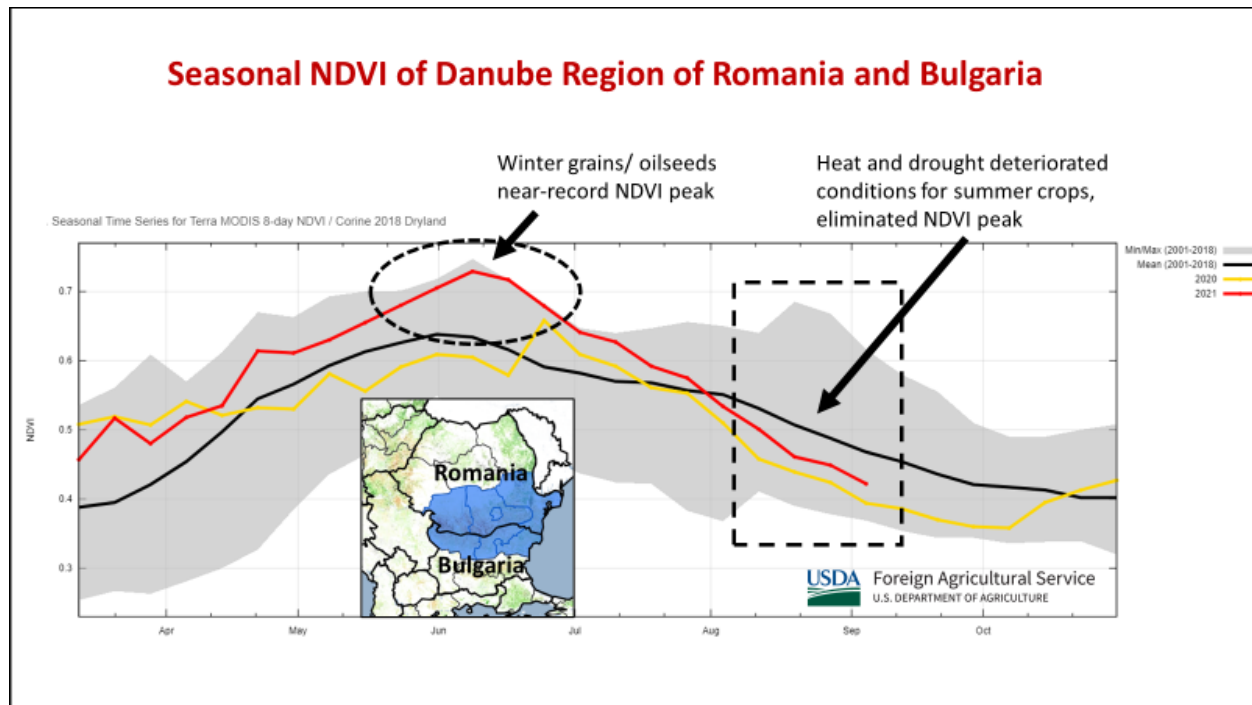
### European Union Wheat Estimates



Data Source:  
PSD Online

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Figure 4. European Union Wheat Estimates. Source USDA PSD Online



**Figure 5. Satellite-Derived NDVI for Danube River Region of Romania and Bulgaria.**  
Source: USDA/NASA GLAM, MODIS 8-day NDVI

### Europe Wheat: 2021/2022 (Sep) Production by Country

European Union Only Production:  
2021/2022 (Sep): 139.0 mmt

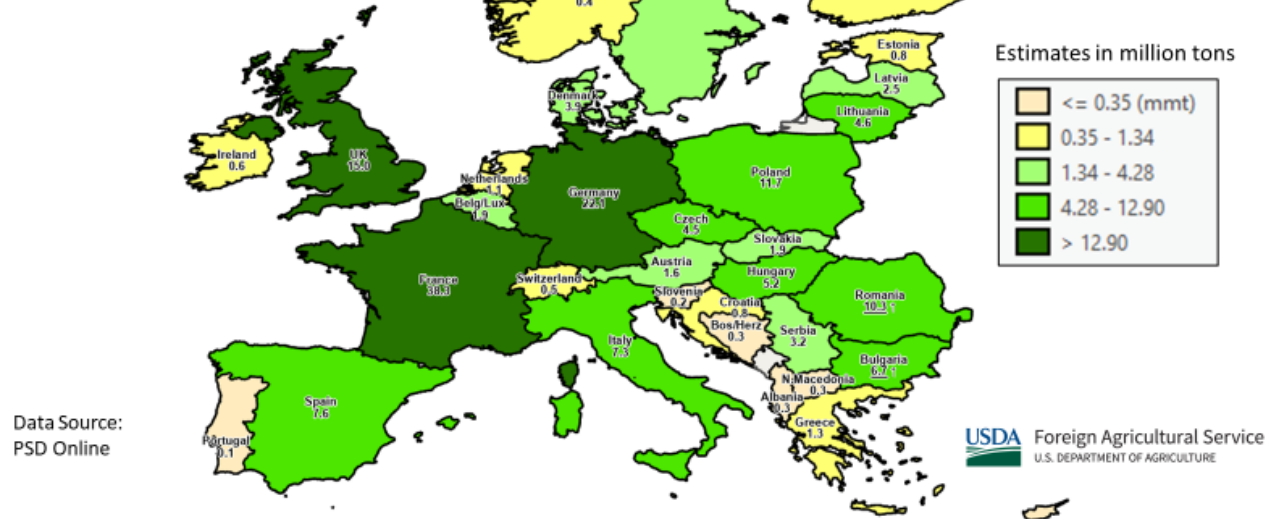


Figure 6. Europe Wheat Production Estimates, September 2021. Source: PSD Online. Map shows all European producing nation estimates; Box shows EU estimate only. Up arrow beside estimate is record high since 2000; Down arrow is record low since 2000.

### Europe Rapeseed: 2021/2022 (Sep) Production by Country

European Union Only Production:  
2021/2022 (Sep): 16.8 mmt

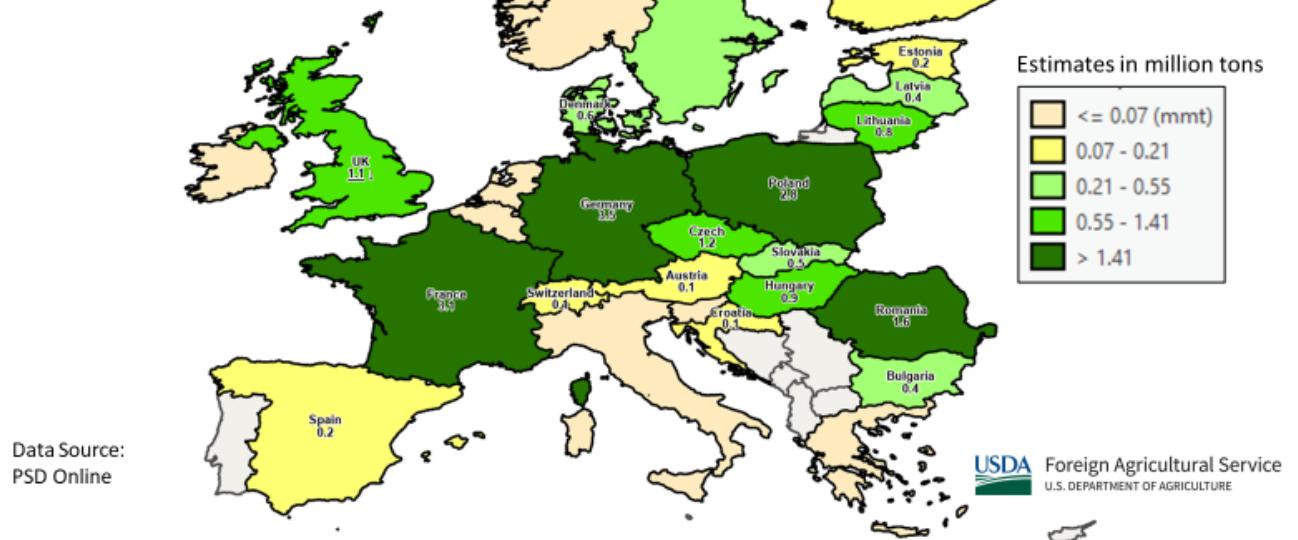
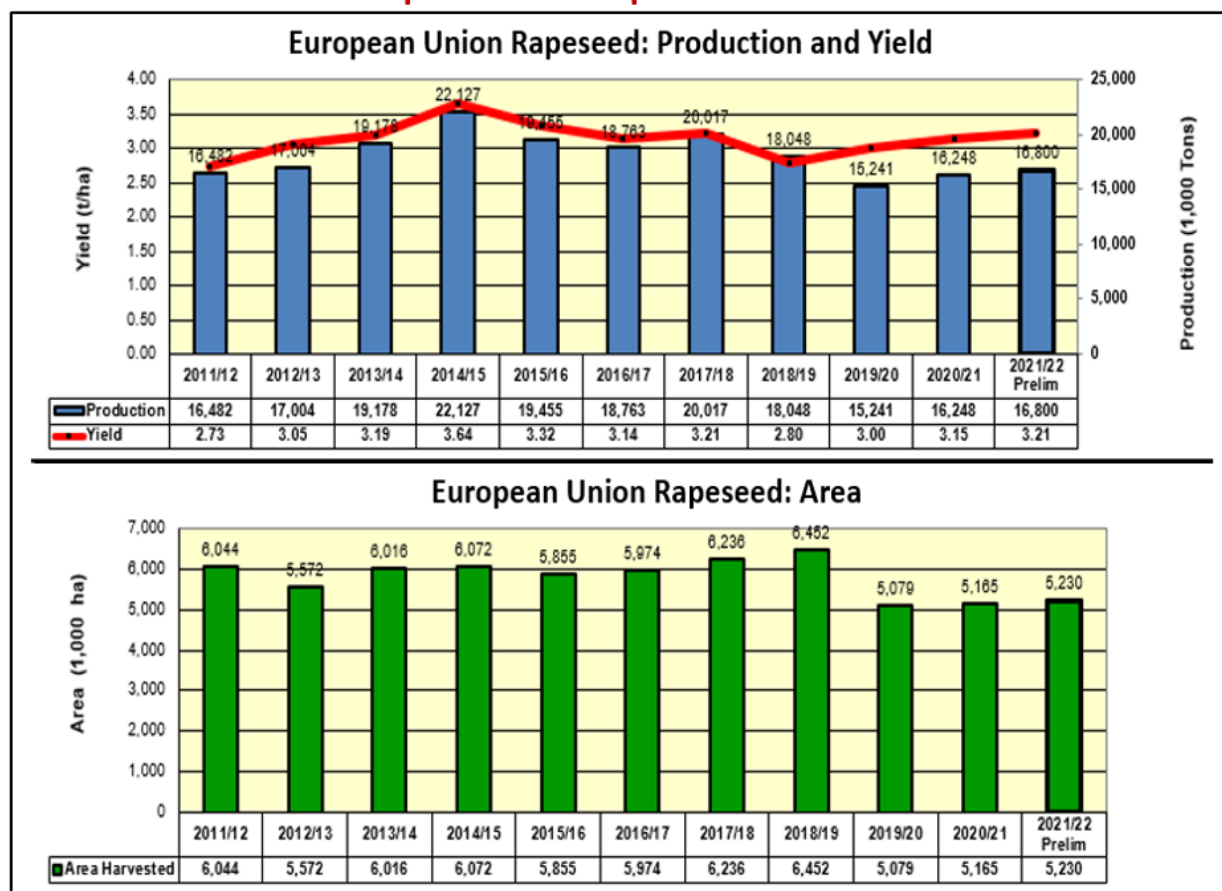


Figure 7. Europe Rapeseed Production Estimates, September 2021. Source: PSD Online. Map shows all European producing nation estimates; Box shows EU total only. Up arrow beside estimate is record high since 2000; Down arrow is record low since 2000

## European Union Rapeseed Estimates



Data Source:  
PSD Online

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**Figure 8. EU Rapeseed Estimates Table. Source: PSD Online**

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Current World Agricultural Production Reports  
<https://www.fas.usda.gov/data/world-agricultural-production>

Production, Supply and Distribution Database (PSD Online)  
<https://apps.fas.usda.gov/psdonline/app/index.html#/app/home>

Global Agricultural Information Network (Agricultural Attaché Reports)  
<https://www.fas.usda.gov/databases/global-agricultural-information-network-gain>

Crop Explorer  
<https://ipad.fas.usda.gov/cropexplorer/>

Global Agricultural and Disaster Assessment System (GADAS)  
<https://geo.fas.usda.gov/GADAS/index.html>