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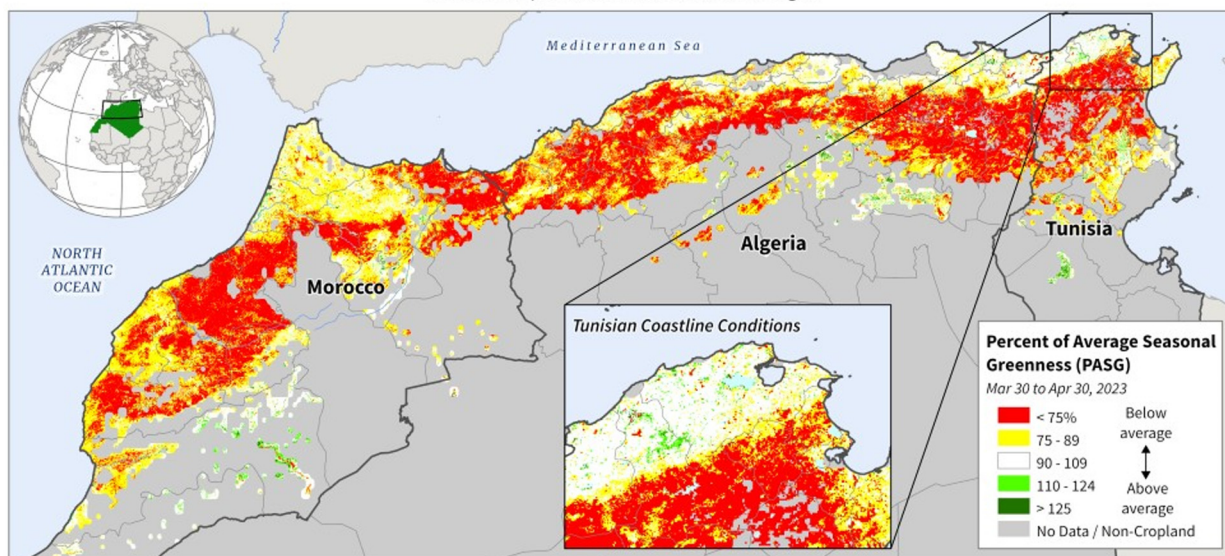
World Agricultural Production

Northwest Africa Wheat: Weather Problems Lead to Another Below-Average Maghreb Wheat Crop in MY 2023/24

Northwest Africa (Morocco, Algeria, Tunisia) marketing year (MY) 2023/24 wheat production is estimated to be low for a second consecutive year. Later than normal rains during planting, and drought and heat during much of the season contributed to this unfavorable outlook. This season will be the fourth of the last 5 years that is below average, with MY 2021/2022 being the remarkably good year and last year being an exceptionally poor year. The combined total production for these three countries in the Maghreb region is forecast at 7.3 million metric tons (mmt) versus 7.6 mmt last year and 11.2 mmt in MY 2021/2022. Sub-par weather prevailed almost entirely across the region during the crop growing season. Rainfall, the limiting variable, was both minimal and infrequent in most areas of Northwest Africa. The satellite-derived Percent Average Seasonal Greenness (PASG) image shows the extent of the poor vegetation health across the region.

Northwest Africa: Wheat-Growing Area PASG

Mar 30 to Apr 30, 2023 (1-Month Average)



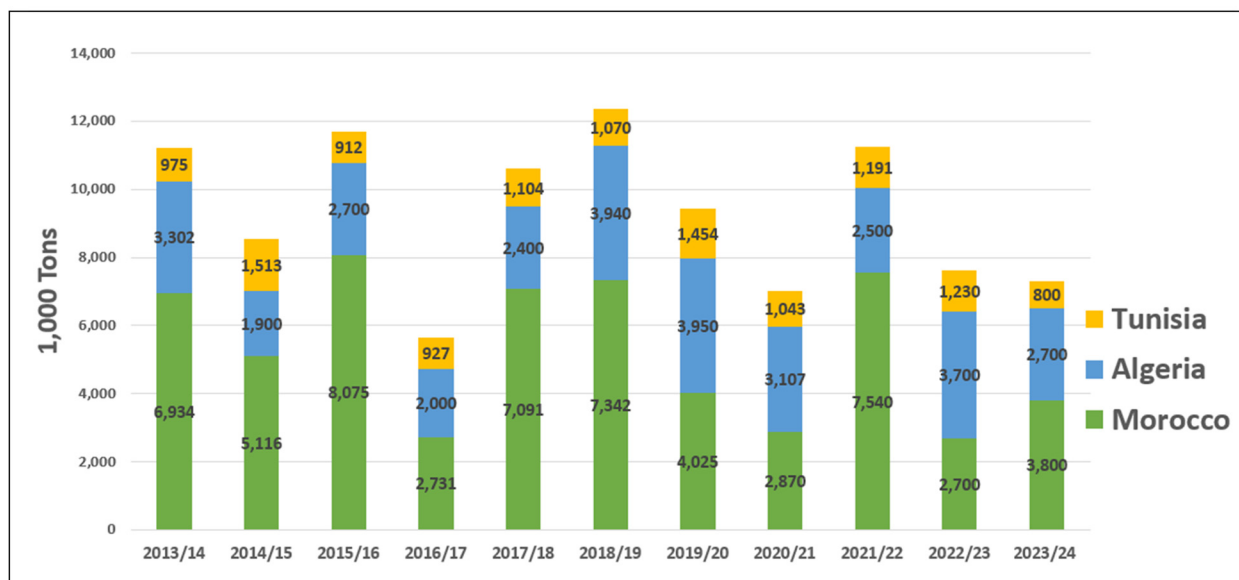
Sources: NASA/GSFC/GIMMS Visible Infrared Imaging Radiometer Suite (VIIRS)
Percent of Average Seasonal Greenness (PASG); IFPRI SPAM Wheat Crop Mask

Morocco is the dominant producer of the three countries. It is estimated to produce 3.8 mmt of wheat compared to 2.7 mmt last year. Early winter precipitation benefitted the crop, however, limited spring rainfall impeded recovery. Yield is estimated at 1.49 tons per hectare (t/ha), above

Approved by the World Agricultural Outlook Board

last year's abysmal 1.08 t/ha. Rains arrived late in Morocco, lowering seeding rates and creating sub-optimal conditions. Except for early winter rains, Morocco was especially dry all season; in general, the farther south, the drier the conditions and the poorer the crops. Several years of poor weather has lowered Morocco's 5-year production average to 4.9 mmt. Harvested area for MY 2023/24 is estimated at 2.6 million hectares (mha,) slightly above last year, but 5 percent below the 5-year average.

Northwest Africa Wheat Production



Source: USDA PSD Online

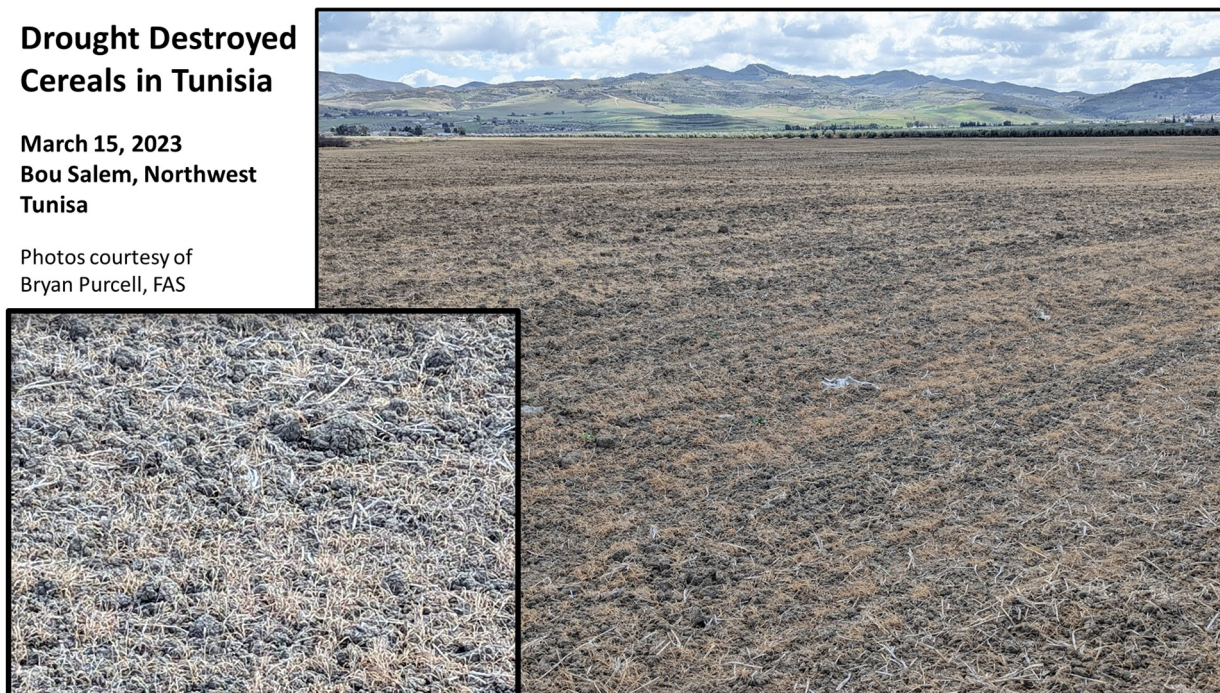
Algeria is forecast to produce just 2.7 mmt from 2.1 mha, with a 1.30 t/ha yield. This compares unfavorably to MY 2022/23, with 3.7 mmt, similar area, and a yield of 1.78 t/ha. The MY 2023/24 crop is estimated to be 21 percent below the 5-year average production. Algeria, also starved for moisture, saw little relief to salvage its crop during the season. The crops doing the best in Algeria are in the eastern highlands, where rainfall was most frequent and vegetation vigor was the highest.

Tunisia's arable land is the smallest of these three Maghreb countries, with total harvested area dropping 19 percent below the 5-year average to 435,000 hectares. Production is forecast at 0.8 mmt, down 0.4 mmt or 35 percent from last year, and down 33 percent from the 5-year average. Yield is forecast at 1.84 t/ha, down 24 percent from last year and 17 percent from the 5-year average. An interesting dynamic has set-up where a very narrow band of healthy wheat exists along a swath of the northern coast. Sufficient rainfall in the far north has kept this area's portion of Tunisia's grain crop healthy. Conversely, the area to the south is in extremely poor condition due to a substantial lack of soil moisture. Crop travel to the region by FAS staff in March 2023 underscored the dire effects experienced in Tunisia's large, central growing region. Visits with farmers in this region, who had already lost their crop due to the drought, were left with the less-than-ideal options of either collecting any surviving grain for next year's planting seeds, or having the marginal crop grazed off by livestock. In many cases, there was no option; the plants were already dead as seen in the photograph of fields near Bou Salem, Tunisia. The inset in the Northwest Africa: Wheat-Growing Area PASG map details the small area of favorable crops in northern Tunisia.

Drought Destroyed Cereals in Tunisia

March 15, 2023
Bou Salem, Northwest
Tunisia

Photos courtesy of
Bryan Purcell, FAS

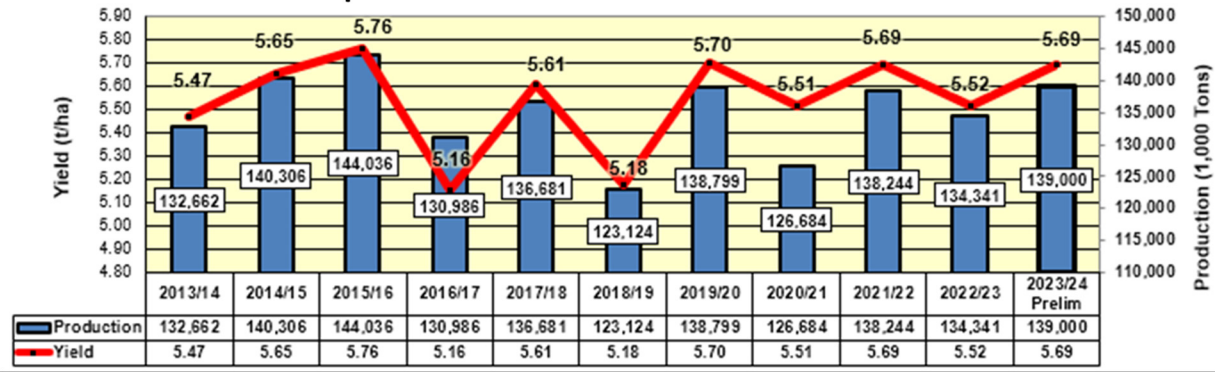


Harvest begins in southern Morocco in May, progressing north and east into Algeria and Tunisia. The bulk of wheat production in North Africa is harvested by the end of June. *(For more information, please contact Bryan.Purcell@usda.gov.)*

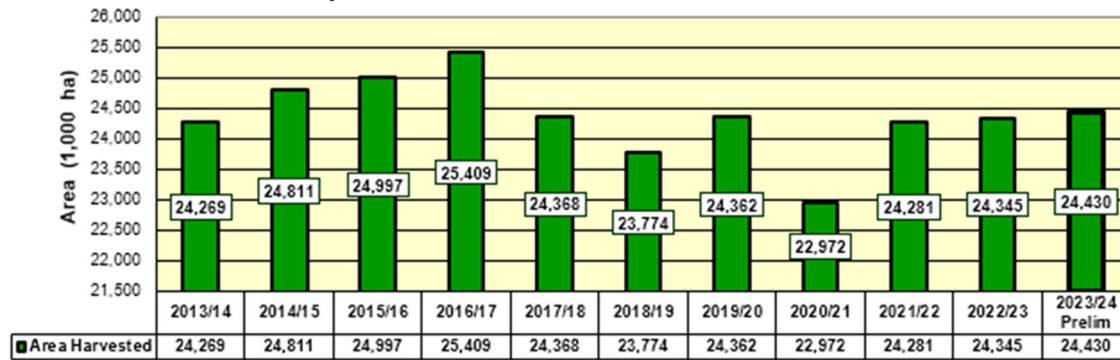
European Union Wheat: Favorable Conditions for MY 2023/24 Except the Iberian Peninsula

Wheat production in the European Union (EU) for marketing year (MY) 2023/2024 is estimated at 139.0 million metric tons (mmt), up 3 percent from last year, and 5 percent above the 132.2 mmt 5-year average. Harvested area is estimated at 24.4 million hectares (mha), up slightly from last year and 2 percent above the 5-year average. Yield is estimated at 5.69 tons per hectare, 3 percent above last year and the 5-year average.

European Union: Wheat Yield and Production

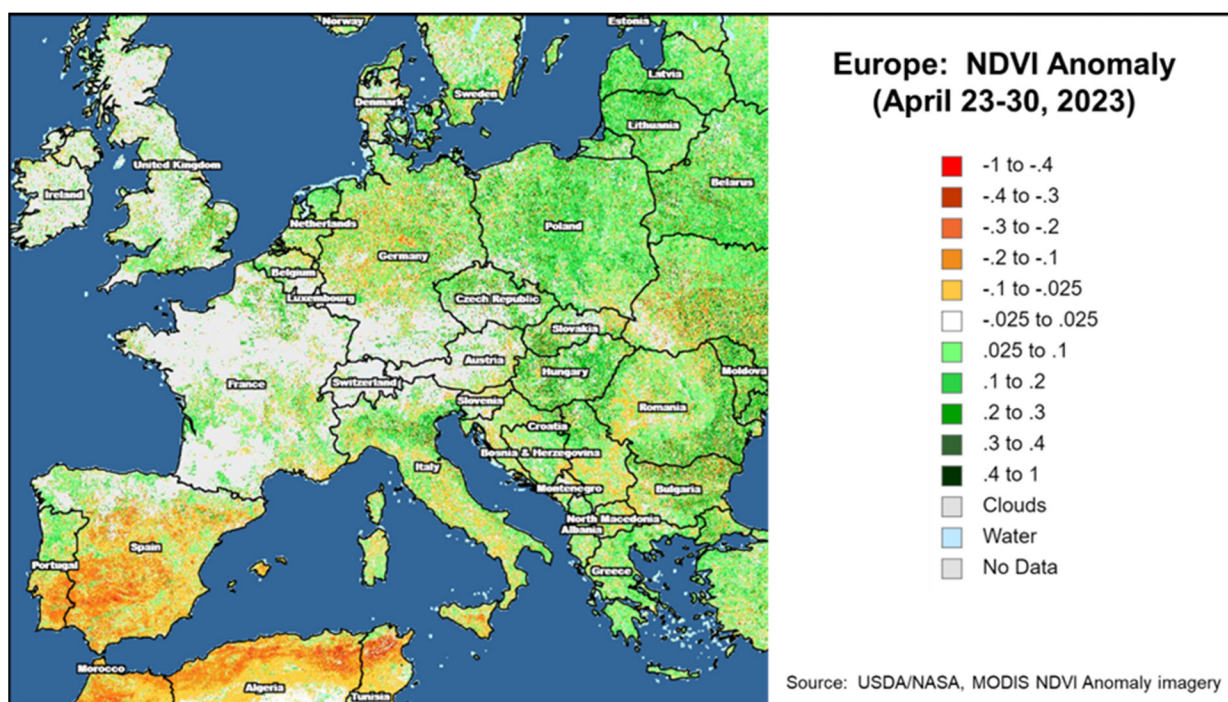


European Union: Wheat Harvested Area



Source: USDA PSD Online

Apart from Spain and Portugal where short- and long-term drought have significantly lowered expectations, favorable crop conditions exist across the EU. Satellite-derived Normalized Difference Vegetation Index (NDVI) anomaly imagery of Europe at the end of April depicts vigorous vegetation everywhere except the Iberian Peninsula.



Planting conditions last fall were beneficial with good soil moisture levels, encouraging emergence and development. Winter was particularly mild with above-average temperatures resulting in minimal-to-no winterkill. After a dry winter, soil moisture has been increasing during spring with more rain; however, precipitation must soon taper off to allow for sunlight, inputs, and field work to aid the crop. Satellite-derived MODIS (NDVI) depicts almost every region in the EU (except Spain and Portugal) to be above average or at record-level greenness. Wheat production from the three largest producers is forecast at 36.6 mmt in France (35.0 mmt last year), 22.1 mmt (22.6 mmt) in Germany, and 13.3 mmt (13.4 mmt) in Poland.