

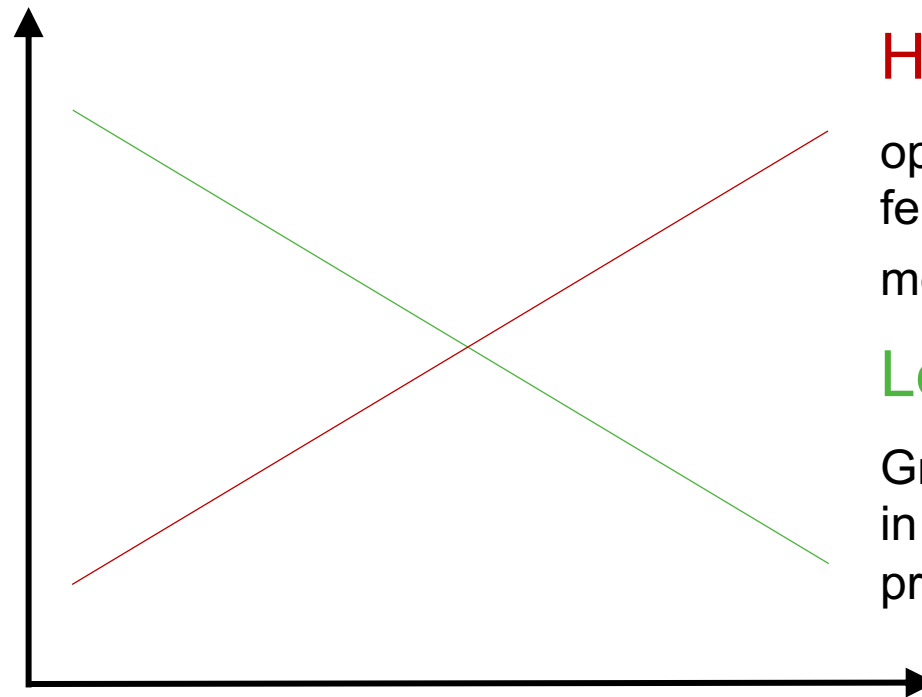
## EU27+UK and North Africa production prospects

promising outlook overall in most of Europe,  
yield potentials already penalized in Spain and  
North Africa

# A challenging year for farmers



fear of a “price scissors” effect on margins for the 2023-harvest



## High costs

operating expenses (seeds, fertilizers, energy)  
mechanization costs

## Lower revenues

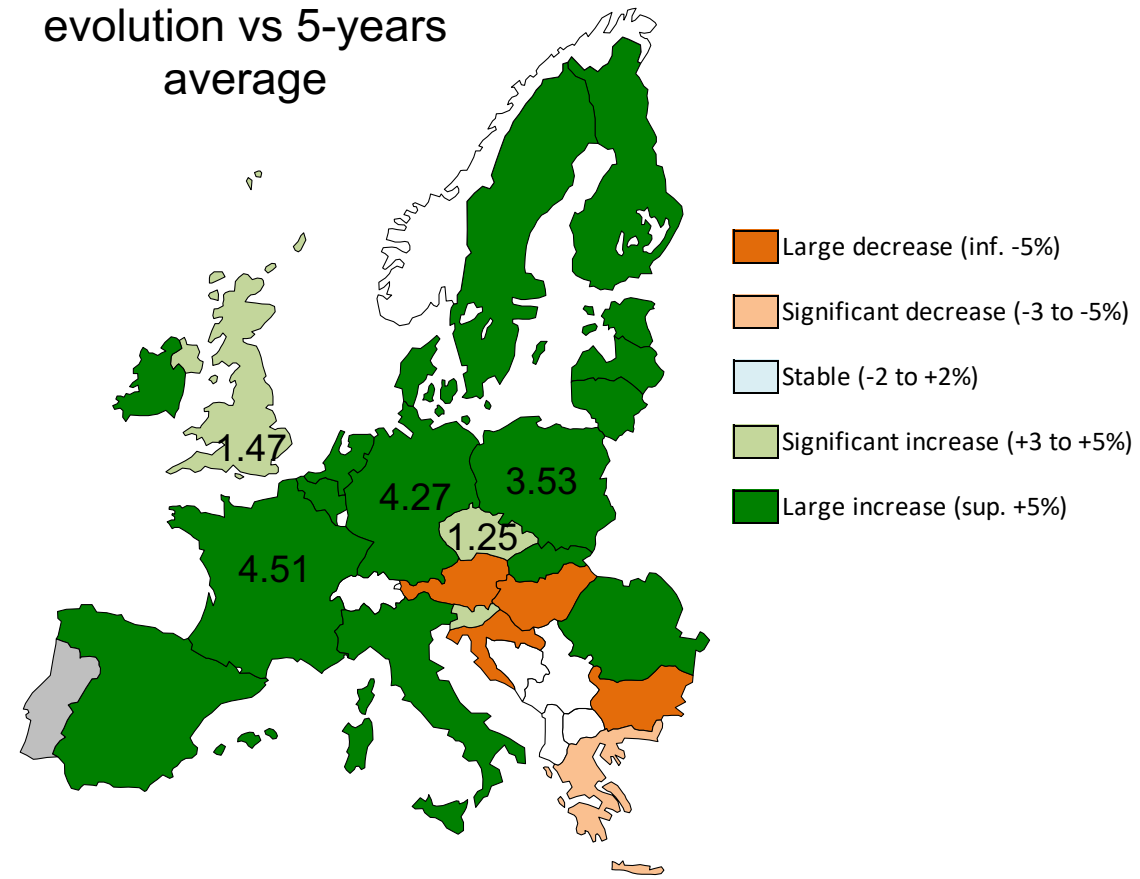
Grain market fundamentals in Europe still point to lower prices

vulnerability in case of bad crops



# a slight increase for rapeseed production year-on-year (+1%)

production in 2023 (Mt)  
evolution vs 5-years average



acreage up +2 % year-on-year (sharply up in Germany and France).

mild winter and favourable weather conditions so far during flowering

an upward production potential

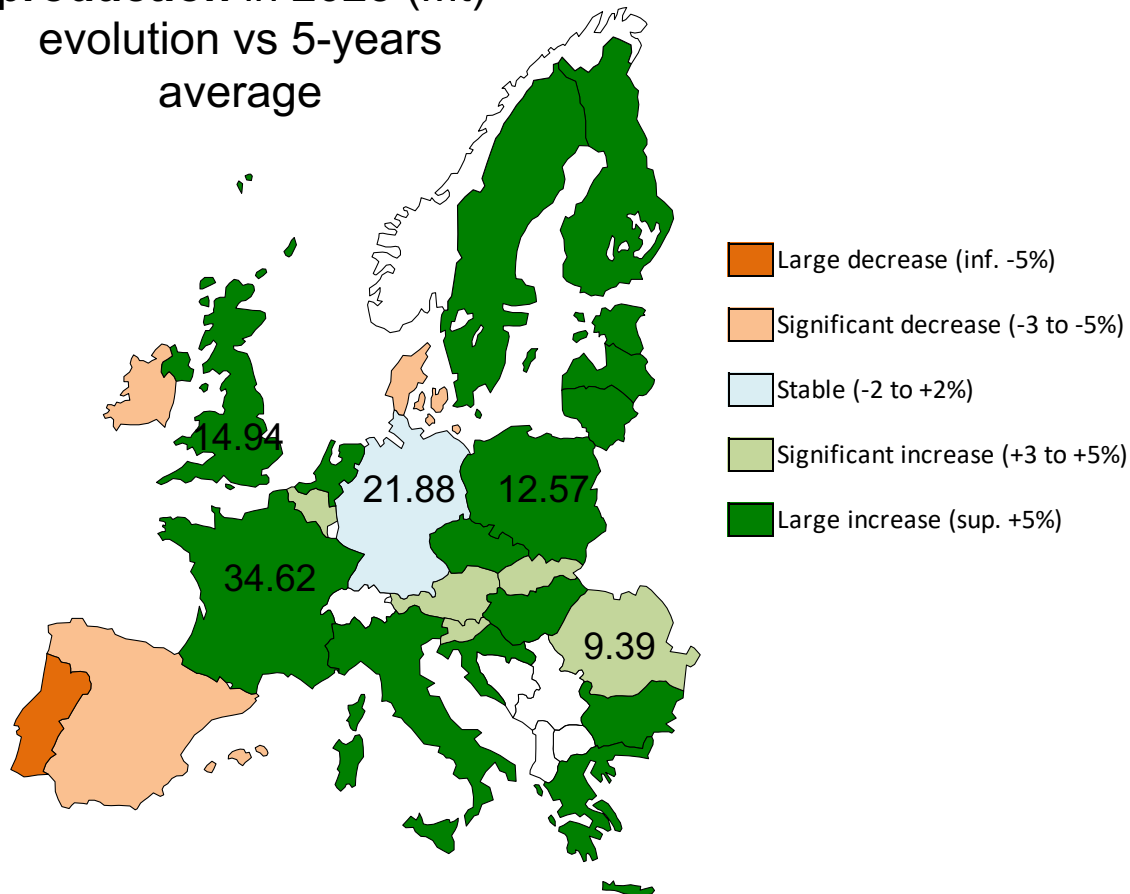
## Total EU-27 + UK

21 Mt (20.74 Mt in 2022/23)  
6.34 Mha (6.19 Mha in 2022/23)



# a soft wheat harvest projected up +4% vs the 5-years average

production in 2023 (Mt)  
evolution vs 5-years  
average



satisfactory crop ratings overall (return of rains in France and south-eastern Europe)

yield potentials already badly penalized in Spain, additional production losses possible

production forecast sharply up year-on-year in south-eastern Europe

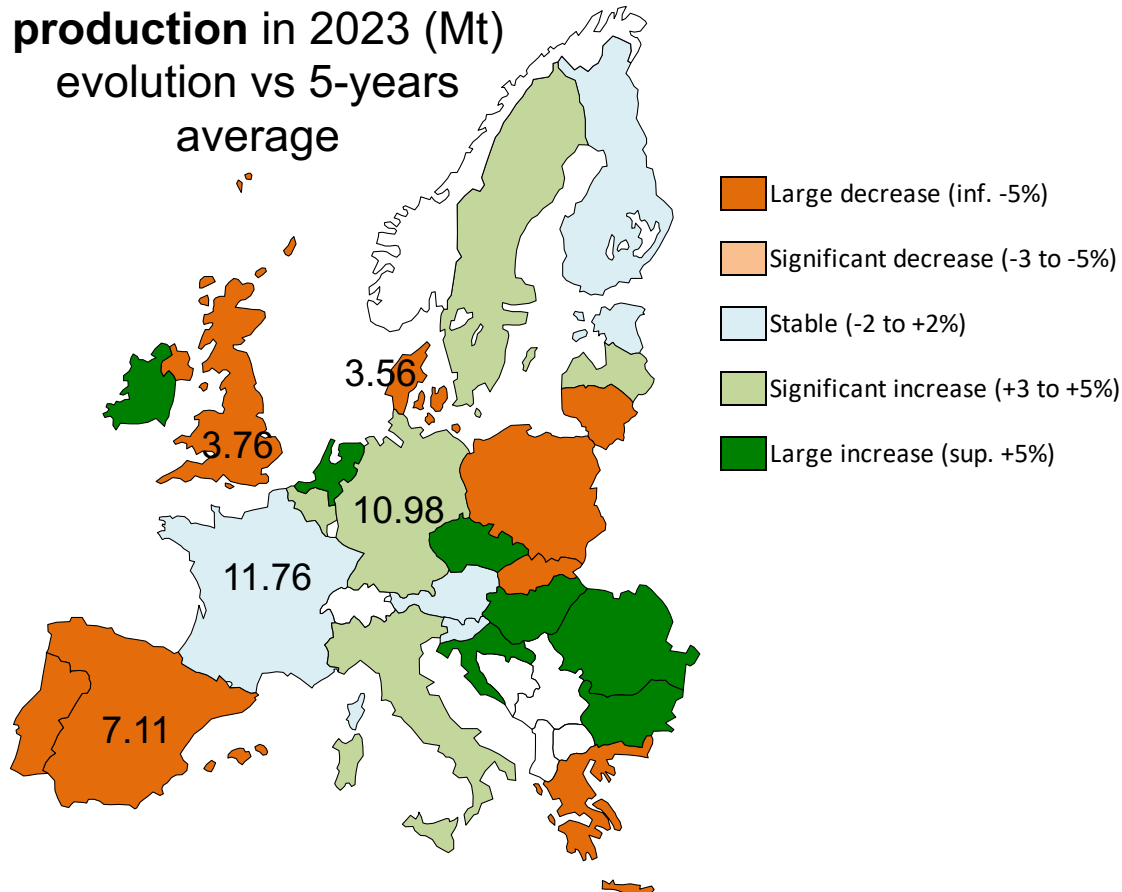
Total EU-27 + UK (soft wheat)  
23.76 Mha (23.64 Mha in 2022/23)  
143.8 Mt (140.7 Mt in 2022/23)

Total EU-27 + UK (total wheat)  
26.23 Mha (26.13 Mha in 2022/23)  
151.51 Mt (147.84 Mt in 2022/23)



# barley production expected stable vs last year

**production in 2023 (Mt)**  
evolution vs 5-years  
average



Total EU-27 + UK  
11.37 Mha (11.36 Mha in 2022/23)  
58.58 Mt (58.6 Mt in 2022/23)

**winter barley :**  
acreage up +2% vs last year  
5.21 Mha (5.12 Mha in 2022/23)

satisfactory crop ratings

production forecast at 31.17 Mt  
(30.90 Mt in 2022/23)

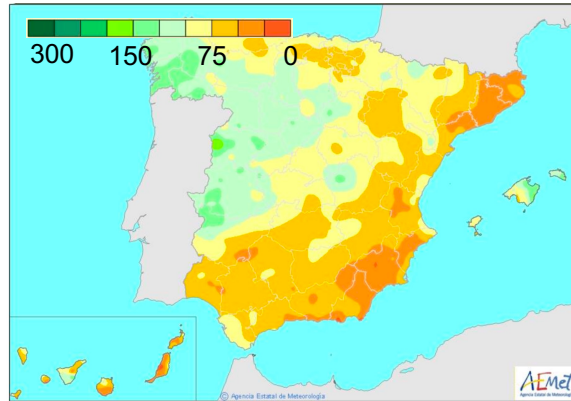
**spring barley :**  
acreage estimated at its lowest level  
6.16 Mha (6.24 Mha in 2022/23)

sowings delayed in north Europe,  
higher risks for late crop cycle

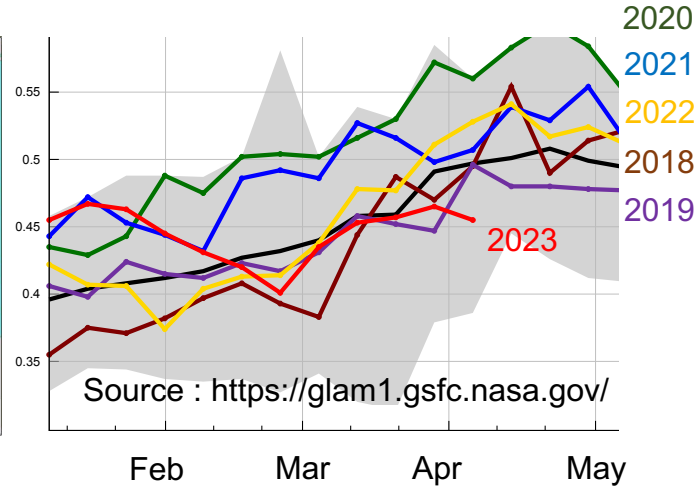
production forecast at 27.41 Mt  
(27.71 Mt in 2022/23)



# a focus on Spain, further loss of production possible



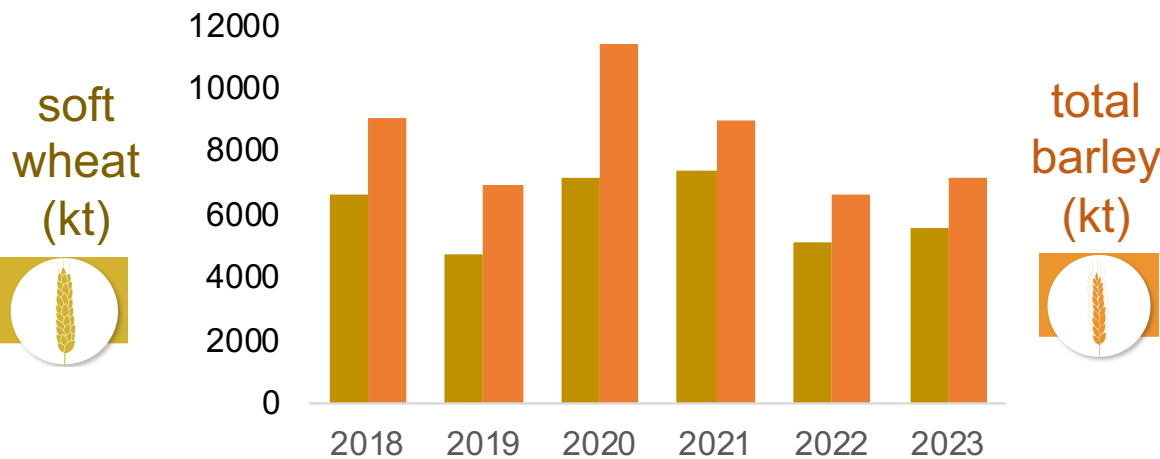
cumulative precipitation between October 1, 2022, and April 4, 2023, and comparison with 1991-2020 average (%) (source : AEMET)



Source : <https://glam1.gsfc.nasa.gov/>

Andalusia and Castilla-Mancha in dire need of rains

yield and production potentials could further deteriorate



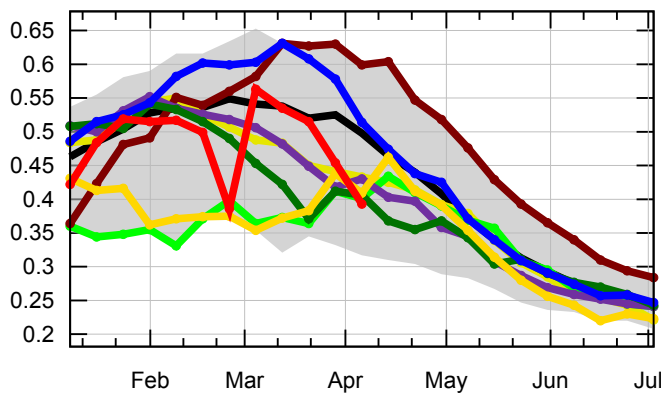
 5,56 Mt vs 5,13 Mt in 2023/23

 7,02 Mt vs 6,64 Mt in 2023/23

# persistent drought and low water reserves in north Africa (Morocco, Algeria, Algeria)



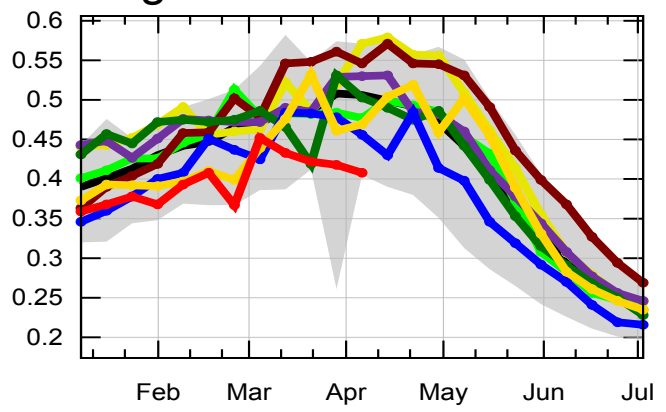
### Morocco



2023 2022 2019 2021 2020 2018  
2016 2012

non conducive conditions in autumn for sowing, less acreage than planned  
some rains returning end-february, very dry since

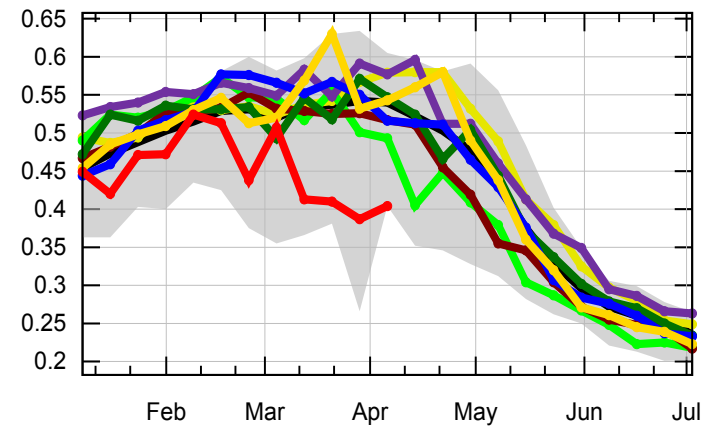
### Algeria



2023 2022 2019 2021 2020 2018  
2016 2012

persistent dry conditions in the eastern part of the country

### Tunisia



2023 2022 2019 2021 2020 2018  
2016 2012

Source : <https://glam1.gsfc.nasa.gov/>

fields sown with durum wheat put to grazing  
irrigation bans since early April

# a slump in production expected in North Africa



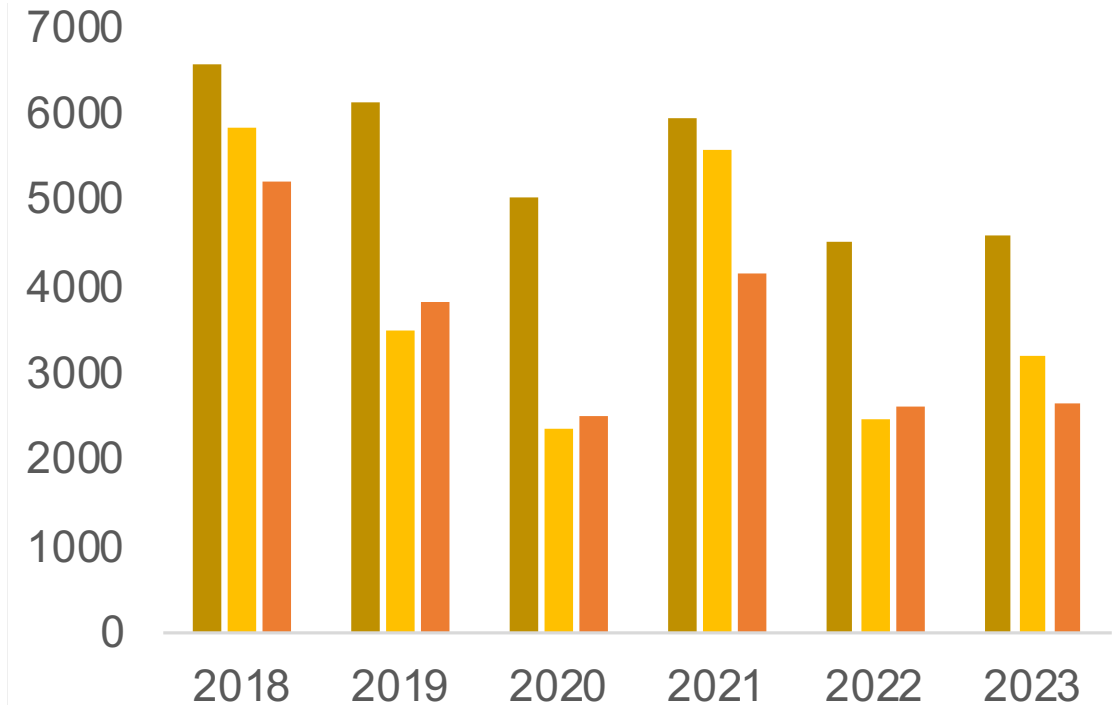
<b>Soft wheat</b>	Acreage (Mha)	Production (Mt)
Morocco	1.69 (-5%)*	2.68 (-18%)
Algeria	0.36 (-2%)	0.42 (-22%)
Tunisia	0.06 (-9%)	0.09 (-34%)

<b>Barley</b>	Acreage (Mha)	Production (Mt)
Morocco	1.14 (-16%)	1.27 (-22%)
Algeria	1.02 (0%)	1.22 (-27%)
Tunisia	0.26 (-25%)	0.26 (-45%)

<b>Durum wheat</b>	Acreage (Mha)	Production (Mt)
Morocco	0.89 (-4%)	1.37 (-13%)
Algeria	1.71 (+2%)	2.50 (-16%)
Tunisia	0.44 (-8%)	0.71 (-35%)
EU-27+UK	2.47 (+2%)	7.01 (+1%)

\* vs 5-years average

production (kt) in Morocco + Algeria + Tunisia



**Durum wheat**  
4.58 Mt in 2023 (vs 4.52 Mt ly)

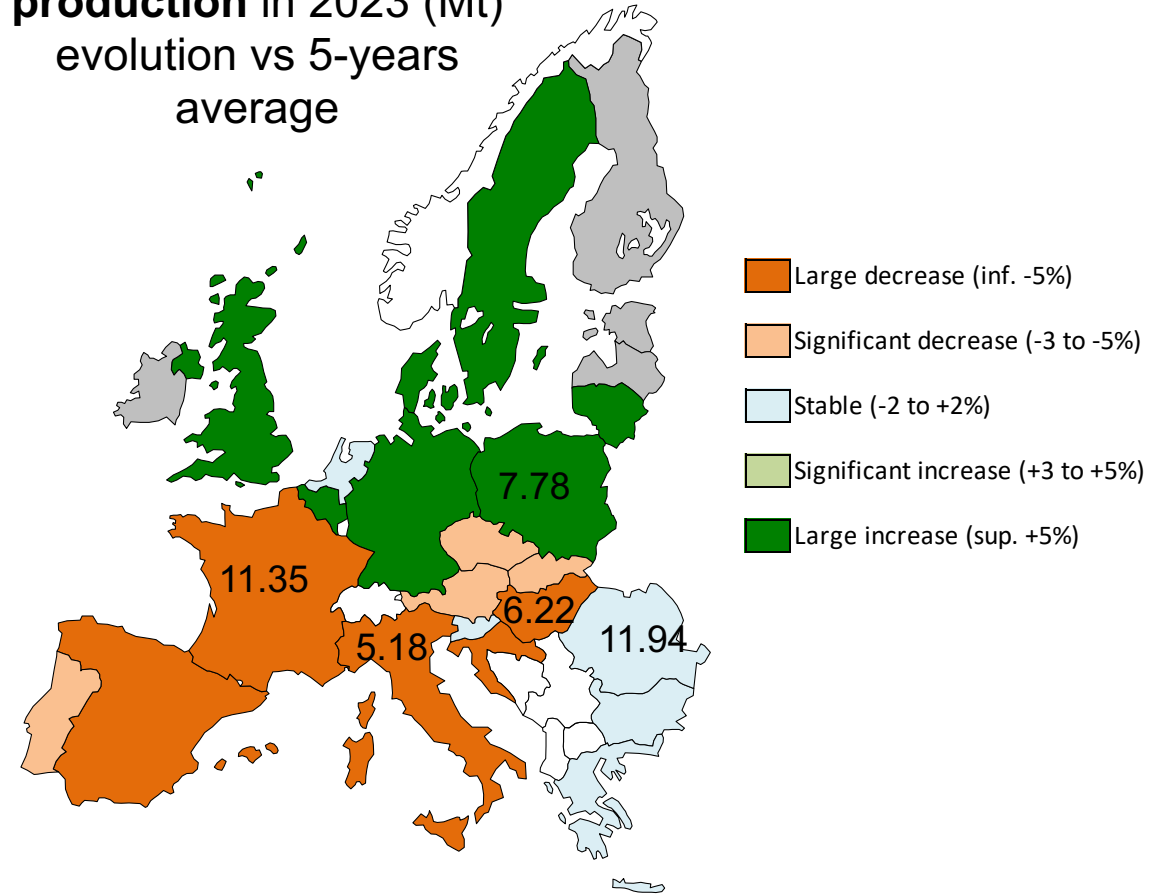
**Soft wheat**  
3.19 Mt in 2023 (vs 2.05 Mt ly)

**Barley**  
2.65 Mt in 2023 (vs 2.62 Mt ly)



# maize production set to rebound after a catastrophic 2022-harvest

production in 2023 (Mt)  
evolution vs 5-years  
average



a large increase in production when compared to the 2022-harvest (assuming trend yield)

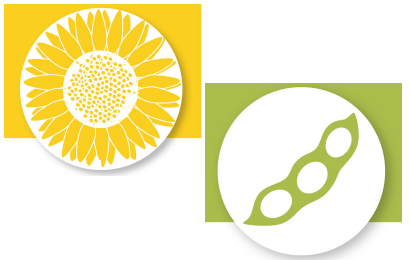
- 3% harvested acreage year-on-year (-4% in area sown), access to irrigation water in France

rather rainy and cold start to the campaign in Central and Southeast EU

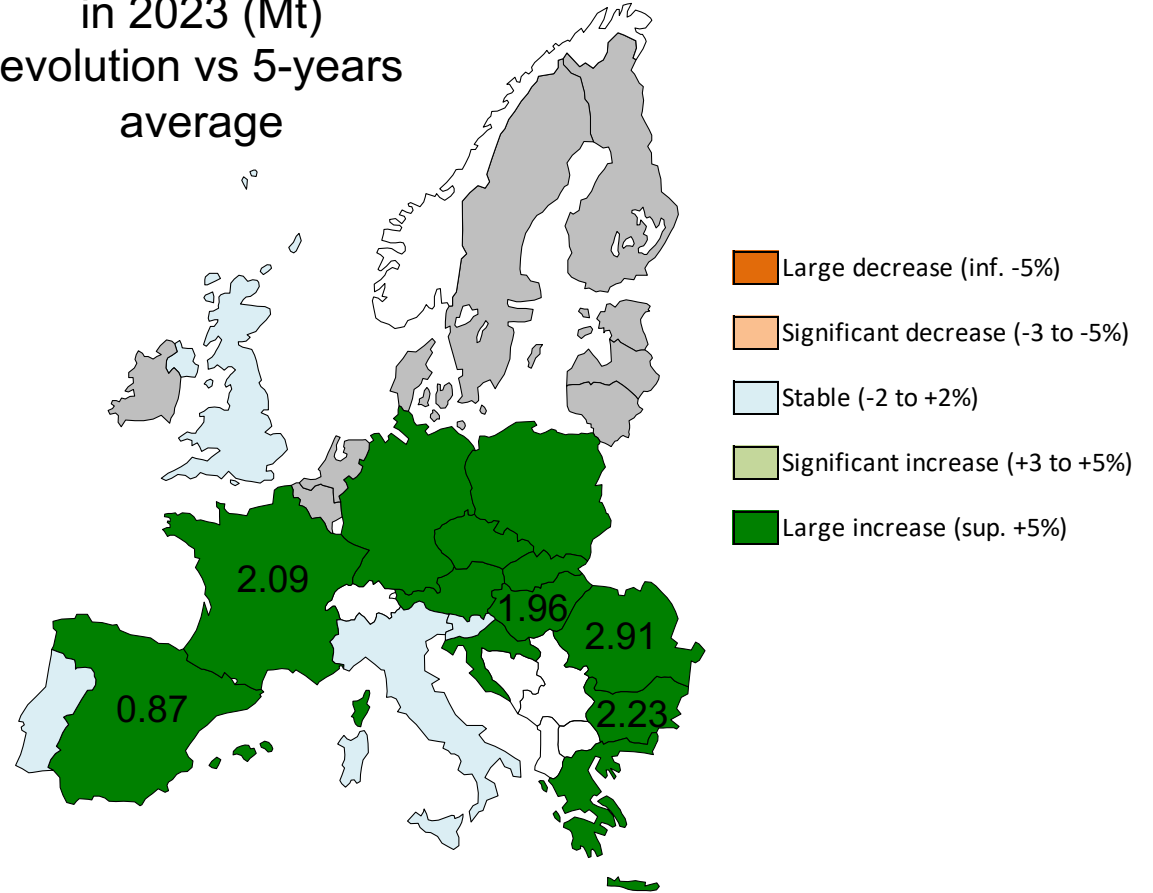
## Total EU-27 + UK

8.60 Mha (8.83 Mha in 2022/23)  
62.73 Mt (52.06 Mt in 2022/23)

# possible record levels for spring oilseed crops production



## sunflower production in 2023 (Mt) evolution vs 5-years average



acreage similar to last year – close to its highest level and yields based on trend



**Sunflower total EU-27 + UK**  
 5.08 Mha (5.13 Mha in 2022/23)  
 11.3 Mt (9.17 Mt in 2022/23)



**Soybean total EU-27 + UK**  
 1.13 Mha (1.12 Mha in 2022/23)  
 3.19 Mt (2.5 Mt in 2022/23)

# Take home message



1) favourable conditions for winter crops in western and central European countries, possible upward revision

2) low production potential in Spain and north Africa – harvest in Tunisia expected at a catastrophic level – possible downward revision

3) spring sowings delayed in north Europe (spring barley) and south-east Europe (maize)

4) access to irrigation water for summer crops in France

**Thanks for your attention**