

# CropWatch Bulletin

QUARTERLY REPORT ON GLOBAL CROP PRODUCTION

**Monitoring Period: January – April 2019**

**May 31, 2019**

Vol. 19, No. 2 (total No. 113)



Institute of Remote Sensing and Digital Earth  
Chinese Academy of Sciences



May 2019

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# Contents

**NOTE: CROPWATCH RESOURCES, BACKGROUND MATERIALS AND ADDITIONAL DATA ARE AVAILABLE ONLINE AT [WWW.CROPWATCH.COM.CN](http://WWW.CROPWATCH.COM.CN).**

<b>CONTENTS</b> .....	<b>III</b>
<b>ABBREVIATIONS</b> .....	<b>X</b>
<b>BULLETIN OVERVIEW AND REPORTING PERIOD</b> .....	<b>XI</b>
<b>EXECUTIVE SUMMARY</b> .....	<b>13</b>
<b>CHAPTER 1. GLOBAL AGROCLIMATIC PATTERNS</b> .....	<b>16</b>
1.1 INTRODUCTION TO CROPWATCH AGROCLIMATIC INDICATORS (CWAIs) .....	16
1.2 GLOBAL OVERVIEW .....	16
1.3 RAINFALL AND BIOMSS ANOMALIES .....	18
1.4 TEMPERATURES .....	19
1.5 RADPAR .....	20
1.6 COMBINATIONS OF ANOMALIES .....	20
<b>CHAPTER 2. CROP AND ENVIRONMENTAL CONDITIONS IN MAJOR PRODUCTION ZONES</b> .....	<b>22</b>
2.1 OVERVIEW .....	22
2.2 WEST AFRICA .....	23
2.3 NORTH AMERICA .....	24
2.4 SOUTH AMERICA .....	25
2.5 SOUTH AND SOUTHEAST ASIA .....	28
2.6 WESTERN EUROPE .....	30
2.7 CENTRAL EUROPE TO WESTERN RUSSIA .....	32
<b>CHAPTER 3. CORE COUNTRIES</b> .....	<b>34</b>
3.1 OVERVIEW .....	34
3.2 COUNTRY ANALYSIS .....	41
<b>CHAPTER 4. CHINA</b> .....	<b>170</b>
4.1 OVERVIEW .....	170
4.2 CHINA'S WINTER CROPS PRODUCTION .....	172
4.3 REGIONAL ANALYSIS .....	174
4.4 MAJOR CROPS TRADE PROSPECTS .....	182
<b>CHAPTER 5. FOCUS AND PERSPECTIVES</b> .....	<b>184</b>
5.1 CROPWATCH FOOD PRODUCTION ESTIMATES .....	184
5.2 DISASTER EVENTS .....	188
5.3 MOZAMBIQUE FLOODS BASED ON SATELLITE DATA .....	193
5.4 UPDATE ON EL NIÑO .....	195
<b>ANNEX A. AGROCLIMATIC INDICATORS AND BIOMSS</b> .....	<b>199</b>
<b>ANNEX B. QUICK REFERENCE TO CROPWATCH INDICATORS, SPATIAL UNITS AND METHODOLOGIES</b> .....	<b>207</b>
<b>DATA NOTES AND BIBLIOGRAPHY</b> .....	<b>215</b>
<b>ACKNOWLEDGMENTS</b> .....	<b>219</b>
<b>ONLINE RESOURCES</b> .....	<b>220</b>

## LIST OF TABLES

TABLE 1.1 DEPARTURES FROM THE RECENT 15-YEAR AVERAGE OF CROPWATCH AGROCLIMATIC INDICATORS OVER REGIONAL MRU GROUPS DURING JFMA. WITHIN EACH GROUP, AVERAGES ARE WEIGHTED BY THE AGRICULTURAL AREA OF INDIVIDUAL MRUs. "OTHERS" INCLUDE FIVE NON AGRICULTURAL AREAS SHOWN IN WHITE IN THE MAP .....	17
TABLE 2.1 JANUARY TO APRIL 2019 AGROCLIMATIC INDICATORS BY MAJOR PRODUCTION ZONE, CURRENT VALUE AND DEPARTURE FROM 15YA .....	22
TABLE 2.2 JANUARY TO APRIL 2019 AGRONOMIC INDICATORS BY MAJOR PRODUCTION ZONE, CURRENT SEASON VALUES AND DEPARTURE FROM 15YA/5YA .....	22
TABLE 3.0. JANUARY – APRIL 2019 AGRO-CLIMATIC AND AGRONOMIC INDICATORS BY COUNTRY, CURRENT VALUE AND DEPARTURE FROM AVERAGE. ....	40
TABLE 3.1 AFGHANISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	44
TABLE 3.2 AFGHANISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	44
TABLE 3.3 ANGOLA AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	47
TABLE 3.4 ANGOLA AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	47
TABLE 3.5 ARGENTINA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 2019 .....	50
TABLE 3.6 ARGENTINA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY – APRIL 2019 .....	50
TABLE 3.7 AUSTRALIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 2019 .....	53
TABLE 3.8 AUSTRALIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	53
TABLE 3.9 BANGLADESH'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 2019 .....	56
TABLE 3.10 BANGLADESH'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	56
TABLE 3.11 BELARUS'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019. ....	59
TABLE 3.12 BELARUS'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019. ....	59
TABLE 3.13 BRAZIL'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	63
TABLE 3.14 BRAZIL'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	63
TABLE 3.15 CANADA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	65
TABLE 3.16 CANADA AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	65
TABLE 3.17 GERMANY AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	69
TABLE 3.18 GERMANY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUE AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	69
TABLE 3.19 EGYPT'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	71
TABLE 3.20 EGYPT'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	71
TABLE 3.21 ETHIOPIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	74
TABLE 3.22 ETHIOPIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	74

TABLE 3.23 FRANCE'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	78
TABLE 3.24 FRANCE'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUE AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	78
TABLE 3.25 UNITED KINGDOM'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	81
TABLE 3.26 UNITED KINGDOM'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	81
TABLE 3.27 HUNGARY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	84
TABLE 3.28 HUNGARY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	84
TABLE 3.29 INDONESIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	87
TABLE 3.30 INDONESIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUE AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	87
TABLE 3.31 INDIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	91
TABLE 3.32 INDIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	91
TABLE 3.33 IRAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	94
TABLE 3.34 IRAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUE AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	94
TABLE 3.35 ITALY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	97
TABLE 3.36 ITALY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUE AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	97
TABLE 3.37 KAZAKHSTAN AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	100
TABLE 3.38 KAZAKHSTAN, AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	100
TABLE 3.39 KENYA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	103
TABLE 3.40 KENYA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	103
TABLE 3.41 CAMBODIA AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	105
TABLE 3.42 CAMBODIA, AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	106
TABLE 3.43 SRI LANKA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	109
TABLE 3.44 SRI LANKA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	109
TABLE 3.45 MOROCCO'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	112
TABLE 3.46 MOROCCO'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	112
TABLE 3.47 MEXICO'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	115
TABLE 3.48 MEXICO'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	115
TABLE 3.49 MYANMAR'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	118
TABLE 3.50 MYANMAR'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	118

TABLE 3.51 MONGOLIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	121
TABLE 3.52 MONGOLIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	121
TABLE 3.53 MOZAMBIQUE'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	125
TABLE 3.54 MOZAMBIQUE'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	125
TABLE 3.55 NIGERIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	128
TABLE 3.56 NIGERIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	128
TABLE 3.57 PAKISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	131
TABLE 3.58 PAKISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	131
TABLE 3.59 PHILIPPINES'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2019 .....	134
TABLE 3.60 PHILIPPINES'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY - APRIL 2019 .....	134
TABLE 3.61 POLAND'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	137
TABLE 3.62 POLAND'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	137
TABLE 3.63 ROMANIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	140
TABLE 3.64 ROMANIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	140
TABLE 3.65 RUSSIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	145
TABLE 3.66 RUSSIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	145
TABLE 3.67 THAILAND'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	148
TABLE 3.68 THAILAND'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	148
TABLE 3.69 TURKEY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	151
TABLE 3.70 TURKEY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	151
TABLE 3.71 UKRAINE'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	154
TABLE 3.72 UKRAINE'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	154
TABLE 3.73 UNITED STATES'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	157
TABLE 3.74 UNITED STATES'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	158
TABLE 3.75 UZBEKISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2019 .....	161
TABLE 3.76 UZBEKISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY-APRIL 2019 .....	161
TABLE 3.77 VIETNAM'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY -APRIL 2019 .....	164
TABLE 3.78 VIETNAM'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY -APRIL 2019 .....	164

TABLE 3.79 SOUTH AFRICA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY -APRIL 2019 .....	167
TABLE 3.80 SOUTH AFRICA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY -APRIL 2019 .....	167
TABLE 3.81 ZAMBIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY -APRIL 2019 .....	169
TABLE 3.82 ZAMBIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA/15YA, JANUARY -APRIL 2019 .....	169
TABLE 4.1 CROPWATCH AGROCLIMATIC AND AGRONOMIC INDICATORS FOR CHINA, JANUARY TO APRIL 2019, DEPARTURE FROM 5YA AND 15YA.....	171
TABLE 4.2 CHINA, 2019 WINTER CROPS PRODUCTION (THOUSAND TONS) AND PERCENTAGE DIFFERENCE WITH 2018, BY PROVINCE .....	172
TABLE 4.3 CHINA, 2019 WINTER WHEAT AREA, YIELD, AND PRODUCTION AND PERCENTAGE DIFFERENCE WITH 2018, BY PROVINCE .....	173
TABLE 5.1 2019 CEREAL AND SOYBEAN PRODUCTIONS ESTIMATES IN THOUSANDS TONNES.....	187
TABLE 5.2 COMPARISON OF 2019 AND 2018 PRODUCTION OF MAJOR IMPORTERS AND EXPORTERS AS WELL AS THE CHANGE IN THE OFFER AND DEMAND 2017 AND 2018. ....	188
TABLE A.1 JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS BY GLOBAL MONITORING AND REPORTING UNIT.....	199
TABLE A.2 JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS BY COUNTRY .....	201
TABLE A.3 ARGENTINA, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY PROVINCE) .....	202
TABLE A.4 AUSTRALIA, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY STATE) .....	202
TABLE A.5 BRAZIL, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY STATE) ..	202
TABLE A.6 CANADA, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY PROVINCE) .....	203
TABLE A.7 INDIA, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY STATE)....	203
TABLE A.8 KAZAKHSTAN, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY OBLAST) .....	204
TABLE A.9 RUSSIA, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY OBLAST, KRAY AND REPUBLIC) .....	204
TABLE A.10 UNITED STATES, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY STATE) .....	205
TABLE A.11 CHINA, JANUARY - APRIL 2019 AGROCLIMATIC INDICATORS AND BIOMASS (BY PROVINCE) .....	206

## LIST OF FIGURES

FIGURE 1.1 GLOBAL DEPARTURE FROM RECENT 15-YEAR AVERAGE OF THE RAIN, TEMP AND RADPAR INDICATORS SINCE 2017 JFMA PERIOD (AVERAGE OF 65 MRUS, UNWEIGHTED).....	17
FIGURE 1.2 GLOBAL MAP OF RAINFALL ANOMALY (AS INDICATED BY THE RAIN INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT (MRU), DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019 .....	18
FIGURE 1.3 GLOBAL MAP OF BIOMASS PRODUCTION POTENTIAL ANOMALY (AS INDICATED BY THE BIOMASS INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT (MRU), DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019 .....	18
FIGURE 1.4 GLOBAL MAP OF TEMPERATURE ANOMALY (AS INDICATED BY THE TEMP INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT (MRU), DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019 .....	19
FIGURE 1.5 GLOBAL MAP OF PHOTOSYNTHETICALLY ACTIVE RADIATION ANOMALY (AS INDICATED BY THE RADPAR INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT (MRU), DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019 .....	20
FIGURE 2.1 WEST AFRICA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS, JANUARY TO APRIL 2019.....	23

FIGURE 2.2 NORTH AMERICA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS, JANUARY TO APRIL 2019. ....	25
FIGURE 2.3 SOUTH AMERICA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS, JANUARY TO APRIL 2019. ....	26
FIGURE 2.4 SOUTH AND SOUTHEAST ASIA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS, JANUARY TO APRIL 2019.....	29
FIGURE 2.5 WESTERN EUROPE MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS, JANUARY TO APRIL 2019. ....	31
FIGURE 2.6 CENTRAL EUROPE-WESTERN RUSSIA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS, JANUARY TO APRIL 2019.....	33
FIGURE 3.1 GLOBAL MAP OF RAINFALL ANOMALY (AS INDICATED BY THE RAIN INDICATOR) BY COUNTRY AND SUB-NATIONAL AREAS, DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019.....	36
FIGURE 3.2 GLOBAL MAP OF BIOMASS PRODUCTION POTENTIAL ANOMALY (AS INDICATED BY THE BIOMSS INDICATOR) BY COUNTRY AND SUB-NATIONAL AREAS, DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019.....	36
FIGURE 3.3 GLOBAL MAP OF TEMPERATURE ANOMALY (AS INDICATED BY THE TEMP INDICATOR) BY COUNTRY AND SUB-NATIONAL AREAS, DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019. ....	37
FIGURE 3.4 GLOBAL MAP OF PHOTOSYNTHETICALLY ACTIVE RADIATION ANOMALY (AS INDICATED BY THE RADPAR INDICATOR) BY COUNTRY AND SUB-NATIONAL AREAS, DEPARTURE FROM 15YA BETWEEN JANUARY AND APRIL 2019.....	39
FIGURE 3.5 AFGHANISTAN'S CROP CONDITION, JANUARY - APRIL 2019.....	42
FIGURE 3.6 ANGOLA'S CROP CONDITION, JANUARY - APRIL 2019.....	45
FIGURE 3.7 ARGENTINA'S CROP CONDITION, JANUARY - APRIL 2019.....	49
FIGURE 3.8 AUSTRALIA'S CROP CONDITION, JANUARY - APRIL 2019.....	51
FIGURE 3.9 BANGLADESH'S CROP CONDITION, JANUARY - APRIL 2019.....	54
FIGURE 3.10 BELARUS'S CROP CONDITION, JANUARY - APRIL 2019.....	57
FIGURE 3.11 BRAZIL'S CROP CONDITION, JANUARY - APRIL 2019.....	61
FIGURE 3.12 CANADA'S CROP CONDITION, JANUARY - APRIL 2019.....	64
FIGURE 3.13 GERMANY'S CROP CONDITION, JANUARY-APRIL 2019.....	67
FIGURE 3.14 EGYPT'S CROP CONDITION, JANUARY - APRIL 2019.....	70
FIGURE 3.15 ETHIOPIA'S CROP CONDITION, JANUARY - APRIL 2019.....	72
FIGURE 3.16 FRANCE'S CROP CONDITION, JANUARY - APRIL 2019.....	76
FIGURE 3.17 UNITED KINGDOM CROP CONDITION, JANUARY - APRIL 2019.....	79
FIGURE 3.18 HUNGARY'S CROP CONDITION, JANUARY - APRIL 2019.....	82
FIGURE 3.19 INDONESIA'S CROP CONDITION, JANUARY - APRIL 2019.....	85
FIGURE 3.20 INDIA'S CROP CONDITION, JANUARY - APRIL 2019.....	89
FIGURE 3.21 IRAN'S CROP CONDITION, JANUARY - APRIL 2019.....	92
FIGURE 3.22 ITALY'S CROP CONDITION, JANUARY - APRIL 2019.....	95
FIGURE 3.23 KAZAKHSTAN'S CROP CONDITION, JANUARY - APRIL 2019.....	98
FIGURE 3.24 KENYA'S CROP CONDITION, JANUARY - APRIL 2019.....	102
FIGURE 3.25 CAMBODIA'S CROP CONDITION, JANUARY - APRIL 2019.....	104
FIGURE 3.26 SRI LANKA'S CROP CONDITION, JANUARY - APRIL 2019.....	108
FIGURE 3.27 MOROCCO'S CROP CONDITION, JANUARY - APRIL 2019.....	110
FIGURE 3.28 MEXICO'S CROP CONDITION, JANUARY - APRIL 2019.....	114
FIGURE 3.29 MYANMAR'S CROP CONDITION, JANUARY - APRIL 2019.....	117
FIGURE 3.30 MONGOLIA'S CROP CONDITION, JANUARY - APRIL 2019.....	119
FIGURE 3.31 MOZAMBIQUE'S CROP CONDITION, JANUARY - APRIL 2019.....	123
FIGURE 3.32 NIGERIA'S CROP CONDITION, JANUARY - APRIL 2019.....	127
FIGURE 3.33 PAKISTAN'S CROP CONDITION, JANUARY - APRIL 2019.....	129
FIGURE 3.34 PHILIPPINES'S CROP CONDITION, JANUARY - APRIL 2019.....	133
FIGURE 3.35 POLAND'S CROP CONDITION, JANUARY-APRIL 2019.....	135
FIGURE 3.36 ROMANIA'S CROP CONDITION, JANUARY-APRIL 2019.....	138
FIGURE 3.37 RUSSIA'S CROP CONDITION, JANUARY-APRIL 2019.....	142
FIGURE 3.38 THAILAND'S CROP CONDITION, JANUARY-APRIL 2019.....	147
FIGURE 3.39 TURKEY'S CROP CONDITION, JANUARY-APRIL 2019.....	149
FIGURE 3.40 UKRAINE'S CROP CONDITION, JANUARY-APRIL 2019.....	153



FIGURE 3.41 UNITED STATES'S CROP CONDITION, JANUARY-APRIL 2019 .....	156
FIGURE 3.42 UZBEKISTAN'S CROP CONDITION, JANUARY - APRIL 2019 .....	159
FIGURE 3.43 VIETNAM'S CROP CONDITION, JANUARY -APRIL 2019 .....	163
FIGURE 3.44 SOUTH AFRICA'S CROP CONDITION, JANUARY -APRIL 2019 .....	165
FIGURE 3.45 ZAMBIA'S CROP CONDITION, JANUARY - APRIL 2019 .....	168
FIGURE 4.1 CHINA CROP CALENDAR .....	171
FIGURE 4.2 CHINA SPATIAL DISTRIBUTION OF RAINFALL PROFILES, JANUARY-APRIL 2019.....	171
FIGURE 4.3 CHINA SPATIAL DISTRIBUTION OF TEMPERATURE PROFILES, JANUARY-APRIL 2019 .....	171
FIGURE 4.4 CROPPED AND UNCROPPED ARABLE LAND BY PIXEL, JANUARY-APRIL 2019 .....	172
FIGURE 4.5 CHINA MAXIMUM VEGETATION CONDITION INDEX (VCIX), BY PIXEL, JANUARY-APRIL 2019 .....	172
FIGURE 4.6 CHINA VEGETATION HEALTH INDEX MINIMUM (VHIN), BY PIXEL, JANUARY-APRIL 2019.	172
FIGURE 4.7 CROP CONDITION CHINA NORTHEAST REGION, JANUARY - APRIL 2019.....	175
FIGURE 4.8 CROP CONDITION CHINA INNER MONGOLIA, JANUARY - APRIL 2019 .....	176
FIGURE 4.9 CROP CONDITION CHINA HUANGHUAHAI, JANUARY - APRIL 2019 .....	177
FIGURE 4.10 CROP CONDITION CHINA LOESS REGION, JANUARY - APRIL 2019 .....	178
FIGURE 4.11 CROP CONDITION LOWER YANGTZE REGION, JANUARY - APRIL 2019 .....	179
FIGURE 4.12 CROP CONDITION SOUTHWEST CHINA REGION, JANUARY - APRIL 2019 .....	180
FIGURE 4.13 CROP CONDITION SOUTHERN CHINA REGION, JANUARY - APRIL 2019. ....	181
FIGURE 4.14 RATE OF CHANGE OF IMPORTS AND EXPORTS FOR RICE, WHEAT, MAIZE, AND SOYBEAN IN CHINA IN 2019 COMPARED TO THOSE FOR 2018(%). ....	183
FIGURE 5.1 TRACK OF CYCLONE IDAI .....	191
FIGURE 5.2 DESTRUCTION IN BEIRA FOLLOWING CYCLONE IDAI. ....	191
FIGURE 5.3 SATELLITE-BASED ASSESSMENT OF THE EXTENT OF IDAI FLOODED LAND IN SOUTH-EAST ZIMBABWE.....	192
FIGURE 5.4 AFGHAN RED CRESCENT SOCIETY VOLUNTEERS RESCUING PEOPLE AFFECTED BY THE FLOODS. .....	193
FIGURE 5.5 WATEREXTENSION IN OVER MOZAMBIQUE BETWEEN 13TH -26TH MARCH2019 AND 26TH MARCH TO 09TH APRIL 2019. ....	194
FIGURE 5.6 AFFECTED CROPLAND AREAS BY FLOODS FROM 13TH MARCH TO 9TH APRIL 2019 .....	195
FIGURE 5.7 MONTHLY SOI-BOM TIME SERIES FROM APRIL 2018 TO APRIL 2019 .....	195
FIGURE 5.8 MAP OF NINO REGION.....	196
FIGURE 5.9 APRIL 2019 OF SEA SURFACE TEMPERATURE DEPARTURE FROM THE 1961-1990 AVERAGE .....	196

## Abbreviations

5YA	Five-year average, the average for the four-month period from January from 2014 to 2018 to April next year; one of the standard reference periods.
15YA	Fifteen-year average, the average for the four-month period from January from 2004 to 2018 to April next year; one of the standard reference periods and typically referred to as “average”.
AEZ	Agro-Ecological Zone
BIOMSS	CropWatch agroclimatic indicator for biomass production potential
BOM	Australian Bureau of Meteorology
CALF	Cropped Arable Land Fraction
CAS	Chinese Academy of Sciences
CWAI	CropWatch Agroclimatic Indicator
CWSU	CropWatch Spatial Units
DM	Dry matter
EC/JRC	European Commission Joint Research Centre
ENSO	El Niño Southern Oscillation
FAO	Food and Agriculture Organization of the United Nations
GAUL	Global Administrative Units Layer
GVG	GPS, Video, and GIS data
Ha	hectare
Kcal	kilocalorie
MPZ	Major Production Zone
MRU	Monitoring and Reporting Unit
NDVI	Normalized Difference Vegetation Index
OISST	Optimum Interpolation Sea Surface Temperature
PAR	Photosynthetically active radiation
PET	Potential Evapotranspiration
RADI	CAS Institute of Remote Sensing and Digital Earth
RADPAR	CropWatch PAR agroclimatic indicator
RAIN	CropWatch rainfall agroclimatic indicator
SOI	Southern Oscillation Index
TEMP	CropWatch air temperature agroclimatic indicator
Ton	Thousand kilograms
VCIx	CropWatch maximum Vegetation Condition Index
VHI	CropWatch Vegetation Health Index
VHIn	CropWatch minimum Vegetation Health Index
W/m <sup>2</sup>	Watt per square meter

## Bulletin overview and reporting period

This CropWatch bulletin presents a global overview of crop stage and condition between January and April 2019, a period referred to in this bulletin as the JFMA (January, February, March and April) period or just the “reporting period.” The bulletin is the 113<sup>rd</sup> such publication issued by the CropWatch group at the Institute of Remote Sensing and Digital Earth (RADI) of the Chinese Academy of Sciences, Beijing.

### CropWatch indicators

CropWatch analyses are based mostly on several standard as well as new ground-based and remote sensing indicators, following a hierarchical approach.

In parallel to an increasing spatial precision of the analyses, indicators become more focused on agriculture as the analyses zoom in to smaller spatial units. CropWatch uses two sets of indicators: (i) agroclimatic indicators—RAIN, TEMP, RADPAR, and potential BIOMSS, which describe weather factors and its impacts on crops; and (ii) agronomic indicators—VHIn, CALF, and VCIx, Cropping Intensity, and vegetation indices, describing crop condition and development. Importantly, the indicators RAIN, TEMP, RADPAR, and BIOMSS do not directly describe the weather variables rain, temperature, radiation, or biomass, but rather they are spatial averages over agricultural areas, which are weighted according to the local crop production potential. (ii) PAY indicators: planted area, yield and production.

For each reporting period, the bulletin reports on the departures for all seven indicators, which (with the exception of TEMP) are expressed in relative terms as a percentage change compared to the average value for that indicator for the last five or fifteen years (depending on the indicator). For more details on the CropWatch indicators and spatial units used for the analysis, please see the quick reference guide in Annex B, as well as online resources and publications posted at [www.cropwatch.com.cn](http://www.cropwatch.com.cn).

### CropWatch analysis and indicators

The analyses cover large global zones; major producing countries of maize, rice, wheat, and soybean; and detailed assessments for Chinese regions, 41 major agricultural countries, and 201 Agro-Ecological Zones (AEZs).

This bulletin is organized as follows:

Chapter	Spatial coverage	Key indicators
<b>Chapter 1</b>	World, using Monitoring and Reporting Units (MRU), 65 large, agro-ecologically homogeneous units covering the globe	RAIN, TEMP, RADPAR, BIOMSS
<b>Chapter 2</b>	Major Production Zones (MPZ), six regions that contribute most to global food production	As above, plus CALF, VCIx, and VHIn
<b>Chapter 3</b>	41 key countries (main producers and exporters) and 201 AEZs	As above plus NDVI and GVG survey
<b>Chapter 4</b>	China and regions	As above plus high resolution images;
<b>Chapter 5</b>	Production outlook, and updates on disaster events and El Niño.	

**Regular updates and online resources**

The bulletin is released quarterly in both English and Chinese. E-mail [cropwatch@radi.ac.cn](mailto:cropwatch@radi.ac.cn) to sign up for the mailing list or visit CropWatch online at [www.cropwatch.com.cn](http://www.cropwatch.com.cn), <http://cloud.cropwatch.com.cn/>

# Executive summary

The current CropWatch bulletin describes world-wide crop condition and food production as appraised by data up to the end of April 2019. It is prepared by an international team coordinated by the Chinese Academy of Sciences.

Special attention is paid to the major producers of maize, rice, wheat and soybean throughout the bulletin. The assessment is based mainly on remotely sensed data. It covers prevailing weather conditions, including extreme factors, at different spatial scales, starting with global patterns in Chapter 1. Chapter 2 focuses on agro-climatic and agronomic conditions in major production zones in all continents. Chapter 3 covers the major agricultural countries that, together, make up at least 80% of production and exports. Each is the object of a detailed analysis. Chapter 3 constitutes the bulk of the Bulletin. Chapter 4 zooms into China. The bulletin also presents the first CropWatch production estimate for selected countries in chapter 5.

The period from January to April 2019 (JFMA) covers the end dormancy for northern hemisphere winter crops, especially wheat, and the early stages of summer crops. In the southern hemisphere, it covers the harvest of summer crops (maize, soybean), or their mid-season and late stages (maize in southern Africa). Closer to the equator, it includes the harvest of the late 2018 crop of maize or rice and the planting of the first 2019 crops, for instance instance in the Philippines, Thailand, Vietnam and Brazil.

## **Agro-climatic conditions**

According to the analyses presented in Chapters 1 and 3.1, prevailing climate conditions during the current 2019 JFMA reporting period were closer to average than during a long series of previous CropWatch reporting periods: global rainfall was just 2% above average, which compares with 13% in 2017 and 8% in 2018. Significant continental differences are nevertheless observed, with large rainfall deficits in Oceania (-23%), moderate deficits in central America (late and end of growing season), south America and in southern Africa where JFMA is the core of the maize season. Some national values were rather low, including Venezuela (-54%), Mexico (-49%), Guatemala (-43%), Portugal (-45%) and neighboring Morocco (-39%), the Philippines (-49%), New Zealand (-32%) and Kenya (-40%). The impact of low rainfall is often confirmed by CropWatch agronomic indicators, for instance in Australia where the fraction of cultivated cropland dropped 39% and vegetation condition indices were the lowest among the 20 top exporters of wheat.

Large positive rainfall anomalies occurred in two disjointed areas in the North America (+12%) and in an area extending from west Africa to central Asia (+11%) and eastern Asia (+10%). This area was highlighted in most recent CropWatch bulletins as it seems to have become a permanent feature. Specific countries to be listed include Iraq (+64%) and Syria (+75%). Both Iran (+39%) and Mozambique (+27%) and adjacent areas receive special attention in the section on disasters in Chapter 5 because of the destruction brought about by floods. Globally, the most anomalous conditions are those that prevailed in the eastern Mediterranean and the Middle East, especially Lebanon and Iraq, with precipitation excess larger than 40%, low temperature and sunshine (departures in excess of -1.2°C and sunshine 8% or more below average)

The largest area of spatially consistent positive temperature anomalies occurred in Eurasia in late winter. Examples include +2.2°C in Latvia, +2.4°C in the Buryatia Republic and Vologda Oblast in Russia, +2.5°C in the Yaroslav Oblast and +3.6°C in the Province of Heilongjiang in China. The unseasonably high temperatures may have affected winter crops and forthcoming summer crops in a way that is not yet fully understood, possibly in areas where agronomic and climatic indicators do not agree. Several cold areas

occurred in north and south America. For sunshine, low values occurred (1) from west Africa to eastern Asia, (2) northern America and (3) the main temperature summer crop areas in south America. Virtually all other areas experienced above-average radiation.

### **2019 Production estimate**

The production estimate proposed in Chapter 5.1 will be updated two times this year. Except for the southern hemisphere, it is currently based largely on a mix of actual crop and weather data for the JFMA period and estimates for May onward, as only one third of the year has elapsed. The share of actual data varies from approximately 18% for maize to 71% for wheat.

CropWatch estimates the global 2019 production of the major commodities at 1005 million tonnes of maize (up 0.7% over 2018), 731 million for rice (up 1.1%), 733 million tonnes of wheat (a 1.5% increase) and 331 million tonnes of soybeans, a 1.2% increase over last year's output. The current estimate is one of the most optimistic issued by CropWatch over the recent cropping seasons, since all crops show positive variations compared with the previous campaign.

Countries that experienced large production increases for maize include mostly Argentina (+7%) and Mexico (+8%) as well as three South-east Asian countries including Bangladesh (+8%), Myanmar (+9%) and Vietnam where the estimated increase reaches 12%. All countries with a significant drop in maize production are located in Africa.

The production of rice increases in south and South-East Asia, starting with India (+1%), Indonesia (+2%), Bangladesh (+6%) and Vietnam (+8%). The most significant decreases occurred in Thailand (-3%) and Cambodia (-8%).

For wheat in several European producers decreases below 2018 output, some of them significantly in Romania (-17%), Turkey (-15%), Belarus (-13%) and Hungary (-11%). Positive values are observed for Italy (+7%) and Great Britain (+8%) and some eastern European and western to central Asian countries, including Ukraine (+4%) and Russia (+9%). The estimates will need to be reassessed because of the uncertainties about the impact of very high temperature in some areas. A production increase is also inferred for China (+1%), Egypt, Brazil, Ethiopia and Pakistan (+4% to +10%). The largest increases are projected for Pakistan (+10%), Morocco (+12%), South-Africa (+14%), Mexico (+17%), and Iran (+19%) where floods have destroyed crops and infrastructure but also supplied much needed water. Production decreases are projected for two southern Hemisphere wheat growers, Argentina and Australia, -3% and -13%. For the United States, the wheat production estimate is up 10%.

Similar to the other rain-fed summer crop in the country, the Argentinian soybean crop is up (+9%) while Brazil stayed at the level of the 2018 output.

The performance of major exporters and importers does not raise any concerns for the availability of maize, rice, wheat and sorghum.

### **China**

Climatic variables and the resulting crop condition were generally favorable in the main winter crop producing areas. Both precipitation and temperature were above average (20% and 0.6°C, respectively). The total output of combined winter crops is estimated to reach 127 million tons, an increase of 1.23 million tons (or 1%) above the 2018 season.

The largest drop of winter crop production occurred in the provinces of Hebei and Shaanxi, but also in Shanxi, Hubei, and Chongqing. Henan and Shandong Provinces, the top two provinces in terms of winter crop production, both recovered from their poor situation in 2018 with a year-on-year increase of 2.8% and 5.6%, respectively, due to the simultaneous increase in planted area and yield.

For wheat alone, production is estimated to reach 117 million tons, an increase of 1.35 million tons or 1.2% above 2018. The largest wheat production drop (8.4%) occurred in Shaanxi. This is the largest annual winter crop production drop in percentage since 2013. The winter wheat planted area in Hubei province is 6.2% down from 2018, leading to very significant 7.2% reduction in production.