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Contents

EXECUTIVE SUMMARY	1
CHAPTER 1. GLOBAL AGROCLIMATIC PATTERNS	4
1.1 INTRODUCTION TO CROPWATCH AGROCLIMATIC INDICATORS (CWAIS)	4
1.3 RAINFALL	5
1.4 Temperatures	6
1.5 RADPAR	6
1.6 BIOMSS	7
CHAPTER 2. CROP AND ENVIRONMENTAL CONDITIONS IN MAJOR PRODUCTION ZC	NES 8
2.1 OVERVIEW	8
2.2 West Africa	9
2.3 NORTH AMERICA	10
2.4 South America	12
2.5 South and Southeast Asia	14
2.6 WESTERN EUROPE	16
2.7 CENTRAL EUROPE TO WESTERN RUSSIA	18
CHAPTER 3. CORE COUNTRIES	21
3.1 Overview	21
3.2 Country analysis	26
CHAPTER 4. CHINA	177
4.1 Overview	177
4.2 CHINA'S CROP PRODUCTION	180
4.3 Regional analysis	184
4.4 Major crops trade prospects	194
CHAPTER 5. FOCUS AND PERSPECTIVES	196
5.1 CropWatch food production estimates	196
5.2 DISASTER EVENTS	199
5.3 UPDATE ON EL NIÑO	203
5.4 The impact of the Russia Ukraine conflict on global food security	205
ANNEX A. AGROCLIMATIC INDICATORS AND BIOMSS	209
ANNEX B. QUICK REFERENCE TO CROPWATCH INDICATORS, SPATIAL UNITS AND	
METHODOLOGIES	218
DATA NOTES AND BIBLIOGRAPHY	226
ACKNOWLEDGMENTS	227
ONLINE RESOURCES	228

LIST OF TABLES

TABLE 2.1 AGROCLIMATIC INDICATORS BY MAJOR PRODUCTION ZONE, CURRENT
VALUE AND DEPARTURE FROM 15YA (JANUARY-APRIL 2022)8
TABLE 2.2 AGRONOMIC INDICATORS BY MAJOR PRODUCTION ZONE, CURRENT SEASON
VALUES AND DEPARTURE FROM 5YA (JANUARY-APRIL 2022)
TABLE 3.1 AFGHANISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 202229
TABLE 3.2 AFGHANISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 .30
TABLE 3.3 ANGOLAS'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 202233
TABLE 3.4 ANGOLAS'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY – APRIL 2022 .33
TABLE 3.5 ARGENTINA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY 2022 – APRIL
CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA JANUARY 2022 – APRIL
2022
TABLE 3 7 ARGENTINA'S CROP PRODUCTION IN 2022 38
TABLE 3.8 AUSTRALIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS.
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 202141
TABLE 3.9 AUSTRALIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS.
CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2021 .41
TABLE 3.10 BANGLADESH'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS.
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2022 .44
TABLE 3.11 BANGLADESH'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY-APRIL 202244
TABLE 3.12 BELARUS'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 2022.
TABLE 3.13 BELARUS'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT
SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022
TABLE 3.14 BRAZIL'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT
SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 202253
TABLE 3.15 BRAZIL'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT
SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022
TABLE 3.16 BRAZIL'S PRODUCTION OUTLOOK IN 2022
TABLE 3.17 CANADA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 202256
TABLE 3.18 CANADA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 .56
TABLE 3.19 GERMANY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS,
CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2022 .60

TABLE 3.20 GERMANY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY-APRIL 2022 ...61 TABLE 3.21 EGYPT'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.22 EGYPT'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.23 ETHIOPIA'S AGROCLIMATIC INDICATORS BY SUB - NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY 2022-APRIL TABLE 3.24 ETHIOPIA'S AGRONOMIC INDICATORS BY SUB - NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY 2022-APRIL TABLE 3.25 FRANCE'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 202272 TABLE 3.26 FRANCE'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.27 UNITED KINGDOM'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY -TABLE 3.28 UNITED KINGDOM'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 75 TABLE 3.29 HUNGARY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2022 .78 TABLE 3.30 HUNGARY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY-APRIL 2022 ... 79 TABLE 3.31 INDONESIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 202282 TABLE 3.32 INDONESIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY – APRIL 2022.82 TABLE 3.33 INDIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.34 INDIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 202286 TABLE 3.35 IRAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.36 IRAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.37 ITALY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.38 ITALY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.39 KAZAKHSTAN AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.40 KAZAKHSTAN, AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S TABLE 3.41 KENYA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.42 KENYA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT

iv|

TABLE 3.43 KYRGYZSTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.44 KYRGYZSTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022102 TABLE 3.45 CAMBODIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.46 CAMBODIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 TABLE 3.47 SRI LANKA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.48 SRI LANKA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022109 TABLE 3.49 MOROCCO'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 15YA, JANUARY – APRIL 2022 TABLE 3.50 MOROCCO'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES, AND DEPARTURE FROM 5YA, JANUARY – APRIL 2022 TABLE 3.51 MEXICO'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.52 MEXICO'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3.53 MYANMAR'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.54 MYANMAR'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022119 TABLE 3.55 MONGOLIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.56 MONGOLIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 TABLE 3.57 MOZAMBIQUE'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.58 MOZAMBIQUE'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 TABLE 3.59 NIGERIA'S AGRO-CLIMATIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA. JANUARY-APRIL 2022 129 TABLE 3.60 NIGERIA'S AGRO-CLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA. JANUARY-APRIL 2022 129 TABLE 3.61 PAKISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2022 132 TABLE 3.62 PAKISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY-APRIL 2022 132 TABLE 3.63 PHILIPPINES' AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.64 PHILIPPINES' AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES, AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022. TABLE 3.65 AFGHANISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.66 AFGHANISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 TABLE 3.67 ROMANIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.68 ROMANIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 TABLE 3.69 RUSSIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 2022. TABLE 3.70 RUSSIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY – APRIL 2022......146 TABLE 3.71 THAILAND'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3.72 THAILAND'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 TABLE 3. 73 TURKEY'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY-APRIL 2022152 TABLE 3. 74 TURKEY'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT TABLE 3. 75 UKRAINE'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 TABLE 3. 76 UKRAINE'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS. CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022156 TABLE 3. 77 MONITORING AND VARIATION OF WINTER CROP AREA IN UKRAINE IN 2022. TABLE 3. 78 CROP PRODUCTION FORECAST FOR WINTER CROPS FOR 2022 IN UKRAINE TABLE 3.79 UNITED STATES' AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022

TABLE 3.80 UNITED STATES'AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE, JANUARY - APRIL 2022
TABLE 3.81 UZBEKISTAN'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022
TABLE 3.82 UZBEKISTAN'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES, AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022 166
TABLE 3. 83 VIETNAM'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY – APRIL 2022
TABLE 3. 84 VIETNAM'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY – APRIL 2022170 TABLE 3.85 SOUTH AFRICA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022
TABLE 3.86 SOUTH AFRICA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022173
TABLE 3.87 ZAMBIA'S AGROCLIMATIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 15YA, JANUARY - APRIL 2022 175
TABLE 3.88 ZAMBIA'S AGRONOMIC INDICATORS BY SUB-NATIONAL REGIONS, CURRENT SEASON'S VALUES AND DEPARTURE FROM 5YA, JANUARY - APRIL 2022
TABLE 4.1 CROPWATCH AGROCLIMATIC AND AGRONOMIC INDICATORS FOR CHINA, JANUARY - APRIL 2022, DEPARTURE FROM 5YA AND 15YA
TABLE 4.2 WINTER CROP PRODUCTION (MILLION TONNES) AND ANNUAL VARIATION (%) IN CHINA'S MAJOR WINTER CROP-PRODUCING PROVINCES AND CITIES IN 2021 180
TABLE 4.3 REMOTE SENSING MONITORING OF ACREAGE OF WINTER WHEAT PLANTED IN MAIN PRODUCING PROVINCES IN 2022 181
TABLE 4.4 AREA (THOUSAND HA), YIELD (KG/HA), PRODUCTION (MILLION TONNES) AND VARIATION (%) OF WINTER WHEAT BY PROVINCE IN CHINA IN 2022 183 VARIATION (%) OF WINTER WHEAT BY PROVINCE IN CHINA IN 2022
TABLE 4.5 REMOTE SENSING MONITORING RESULTS OF EARLY RICE PREPARATION AND TRANSPLANTING AREA IN CHINA'S MAIN WINTER CROP-PRODUCING PROVINCES AND REGIONS IN 2022
TABLE 5.1 2022 CEREAL AND SOYBEAN PRODUCTION ESTIMATES IN THOUSAND TONNES. Δ IS THE PERCENTAGE OF CHANGE OF 2022 PRODUCTION WHEN COMPARED WITH CORRESPONDING 2021 VALUES
TABLE A.1 JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND BIOMASS BYGLOBAL MONITORING AND REPORTING UNIT (MRU)209
TABLE A.2 JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND BIOMASS BY COUNTRY 211
TABLE A.3 ARGENTINA, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND BIOMASS (BY PROVINCE) 212
TABLE A.4 AUSTRALIA, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND BIOMASS (BY STATE) 213

TABLE A.5 BRAZIL, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND	
BIOMASS (BY STATE)	213
TABLE A.6 CANADA, JANUARY 2022 - APRIL 2022 AGROCLIMATIC INDICATORS AND)
BIOMASS (BY PROVINCE)	213
TABLE A.7 INDIA, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND	
BIOMASS (BY STATE)	214
TABLE A.8 KAZAKHSTAN, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS	
AND BIOMASS (BY OBLAST)	214
TABLE A.9 RUSSIA, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND	
BIOMASS (BY OBLAST, KRAY AND REPUBLIC)	215
TABLE A.10 UNITED STATES, JANUARY 2022 - APRIL 2022 AGROCLIMATIC INDICATOR	'S
AND BIOMASS (BY STATE)	216
TABLE A.11 CHINA, JANUARY 2022 – APRIL 2022 AGROCLIMATIC INDICATORS AND	
BIOMASS (BY PROVINCE)	216

LIST OF FIGURES

FIGURE 1.1 GLOBAL DEPARTURE FROM RECENT 15-YEAR AVERAGE OF THE RAIN, TEMP	
AND RADPAR INDICATORS. THE LAST PERIOD COVERS JANUARY TO APRIL (JFMA)	
2022 (AVERAGE OF 65 MRUS, UNWEIGHTED)	5
FIGURE 1.2 GLOBAL MAP OF RAINFALL ANOMALY (AS INDICATED BY THE RAIN	
INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT: DEPARTURE OF	
JANUARY TO APRIL 2022 TOTAL FROM 2007-2021 AVERAGE (15YA), IN PERCENT	5
FIGURE 1.3 GLOBAL MAP OF TEMPERATURE ANOMALY (AS INDICATED BY THE TEMP	
INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT: DEPARTURE OF	
JANUARY TO APRIL 2022 AVERAGE FROM 2007-2021 AVERAGE (15YA), IN °C	6
FIGURE 1.4 GLOBAL MAP OF PHOTOSYNTHETICALLY ACTIVE RADIATION ANOMALY (AS	S
INDICATED BY THE RADPAR INDICATOR) BY CROPWATCH MAPPING AND	
REPORTING UNIT: DEPARTURE OF JANUARY TO APRIL 2022 TOTAL FROM 2007-2021	I
AVERAGE (15YA), IN PERCENT	6
FIGURE 1.5 GLOBAL MAP OF BIOMASS ACCUMULATION (AS INDICATED BY THE BIOMS)	S
INDICATOR) BY CROPWATCH MAPPING AND REPORTING UNIT: DEPARTURE OF	
JANUARY TO APRIL 2022 TOTAL FROM 2007-2021 AVERAGE (15YA), IN PERCENT	7
FIGURE 2.1 WEST AFRICA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATORS,	
JANUARY - APRIL 2022	9
FIGURE 2.2 NORTH AMERICA MPZ: AGROCLIMATIC AND AGRONOMIC	
INDICATORS, JANUARY - APRIL 2022.	11
FIGURE 2.3 SOUTH AMERICA MPZ: AGROCLIMATIC AND AGRONOMIC INDICATOR	RS,
JANUARY - APRIL 2022	13
FIGURE 2.4 SOUTH AND SOUTHEAST MPZ: AGROCLIMATIC AND AGRONOMIC	
INDICATORS, JANUARY - APRIL 2022.	15
FIGURE 2.5 WESTERN EUROPE MPZ: AGROCLIMATIC AND AGRONOMIC	
INDICATORS, JANUARY - APRIL 2022.	17
FIGURE 2.6 CENTRAL EUROPE-WESTERN RUSSIA MPZ: AGROCLIMATIC AND	
AGRONOMIC INDICATORS, JUANUARY-APRIL 2022	19
FIGURE 3.1 NATIONAL AND SUBNATIONAL RAINFALL ANOMALY (AS INDICATED BY THE	
RAIN INDICATOR) OF JANUARY TO APRIL 2022 TOTAL RELATIVE TO THE 2006-2020	
AVERAGE (15YA). IN PERCENT	.24
FIGURE 3.2 NATIONAL AND SUBNATIONAL TEMPERATURE ANOMALY (AS INDICATED BY	(
THE TEMP INDICATOR) OF JANUARY TO APRIL 2022 AVERAGE RELATIVE TO THE	
, 2006-2020 AVERAGE (15YA), IN °C	.24
FIGURE 3.3 NATIONAL AND SUBNATIONAL SUNSHINE ANOMALY (AS INDICATED BY THE	-
RADPAR INDICATOR) OF JANUARY TO APRIL 2021 TOTAL RELATIVE TO THE 2006-	
2020 AVERAGE (15YA), IN PERCENT	.25
FIGURE 3.4 NATIONAL AND SUBNATIONAL SUNSHINE ANOMALY (AS INDICATED BY THE	-
RADPAR INDICATOR) OF JANUARY TO APRIL 2022 TOTAL RELATIVE TO THE 2006-	
2020 AVERAGE (15YA), IN PERCENT	.26
FIGURE 3.5 AFGHANISTAN'S CROP CONDITION, JANUARY - APRIL 2022	.28

FIGURE 3.6 ANGOLA'S CROP CONDITION, JANUARY - APRIL 2022	31
FIGURE 3.7 ARGENTINA'S CROP CONDITION, JANUARY - APRIL 2022	36
FIGURE 3.8 AUSTRALIA'S CROP CONDITION, JANUARY - APRIL 2022	39
FIGURE 3.9 BANGLADESH'S CROP CONDITION, JANUARY - APRIL 2021	42
FIGURE 3.10 BELARUS'S CROP CONDITION, JANUARY – APRIL 2022	47
FIGURE 3.11 BRAZIL'S CROP CONDITION, JANUARY - APRIL 2022	51
FIGURE 3.12 CANADA'S CROP CONDITION, JANUARY - APRIL 2022	55
FIGURE 3.13 GERMANY'S CROP CONDITION, JANUARY-APRIL 2022	58
FIGURE 3.14 EGYPT'S CROP CONDITION, JANUARY-APRIL 2022	62
FIGURE 3.15 ETHIOPIA'S CROP CONDITION, JANUARY 2022-APRIL 2022	65
FIGURE 3.16 FRANCE'S CROP CONDITION, JANUARY - APRIL 2022	70
FIGURE 3.17 UNITED KINGDOM'S CROP CONDITION, JANUARY - APRIL 2022	73
FIGURE 3.18 HUNGARY'S CROP CONDITION, JANUARY-APRIL 2022	77
FIGURE 3.19 INDONESIA'S CROP CONDITION, JANUARY - APRIL 2022	80
FIGURE 3.20 INDIA'S CROP CONDITION, JANUARY - APRIL 2022	84
FIGURE 3.21 IRAN'S CROP CONDITION, JANUARY - APRIL 2022	87
FIGURE 3.22 ITALY'S CROP CONDITION, JANUARY - APRIL 2022	91
FIGURE 3.23 KAZAKHSTAN'S CROP CONDITION, JANUARY-APRIL 2022	95
FIGURE 3.24 KENYA'S CROP CONDITION, JANUARY-APRIL 2022	98
FIGURE 3.25 KYRGYZSTAN'S CROP CONDITION, JANUARY - APRIL 2022	101
FIGURE 3.26 CAMBODIA'S CROP CONDITION, JANUARY - APRIL 2022	104
FIGURE 3.27 SRI LANKA'S CROP CONDITION, JANUARY - APRIL 2022	. 107
FIGURE 3.28 MOROCCO'S CROP CONDITION, JANUARY- APRIL 2022	110
FIGURE 3.29 MEXICO'S CROP CONDITION, JANUARY - APRIL 2022	114
FIGURE 3.30 MYANMAR'S CROP CONDITION, JANUARY - APRIL 2022	. 117
FIGURE 3.31 MONGOLIA'S CROP CONDITION, JANUARY - APRIL 2022	. 120
FIGURE 3.32 MOZAMBIQUE'S CROP CONDITION, JANUARY-APRIL 2022	. 124
FIGURE 3.33 NIGERIA'S CROP CONDITION, JANUARY-APRIL 2022	. 128
FIGURE 3.34 PAKISTAN CROP CONDITION, JANUARY-APRIL 2022	. 131
FIGURE 3.35 PHILIPPINES' CROP CONDITION, JANUARY - APRIL 2022	. 134
FIGURE 3.36 POLAND'S CROP CONDITION, JANUARY – APRIL 2022	. 137
FIGURE 3.37 ROMANIA'S CROP CONDITION, JANUARY - APRIL 2022	. 139
FIGURE 3.38 RUSSIA'S CROP CONDITION, JANUARY – APRIL 2022	. 144
FIGURE 3.39 THAILAND'S CROP CONDITION, JANUARY - APRIL 2022	. 147
FIGURE 3.40 TURKEY'S CROP CONDITION, JANUARY-APRIL 2022	. 151
FIGURE 3.41 UKRAINE'S CROP CONDITION, JANUARY - APRIL 2022	. 155
FIGURE 3.42 WINTER CROP CONDITION IN UKRAINE IN LATER APRIL (LEFT) AND EARL'	Y
MAY (RIGHT) 2022	. 158
FIGURE 3. 43 UNITED STATES CROP CONDITION, JANUARY-APRIL 2022	. 161
FIGURE 3.44 UZBEKISTAN CROP CONDITION, JANUARY - APRIL 2022	. 165
FIGURE 3. 45 VIETNAM'S CROP CONDITIONS, JANUARY – APRIL 2022	. 168
FIGURE 3.46 SOUTH AFRICA'S CROP CONDITION, JANUARY - APRIL 2022	. 171
FIGURE 3. 47 ZAMBIA'S CROP CONDITION, JANUARY - APRIL 2022	. 174
FIGURE 4.1 CHINA CROP CALENDAR	. 178
FIGURE 4.2 CHINA SPATIAL DISTRIBUTION OF RAINFALL PROFILES, JANUARY - APRIL 2	2022 178
FIGURE 4.3 CHINA SPATIAL DISTRIBUTION OF TEMPERATURE PROFILES, JANUARY - AF	PRIL
2022	179

FIGURE 4.4 CHINA CROPPED AND UNCROPPED ARABLE LAND, BY PIXEL, JANUARY - APRIL 2022
FIGURE 4.5 CHINA MAXIMUM VEGETATION CONDITION INDEX (VCIX), BY PIXEL,
FIGURE 4.6 CHINA BIOMASS DEPARTURE MAP FROM 15YA, BY PIXEL, JANUARY - APRIL
FIGURE 4.7 CHINA MINIMUM VEGETATION HEALTH INDEX (VHIN), BY PIXEL, JANUARY -
FIGURE 4.8 NATIONAL WINTER WHEAT PLANTING DISTRIBUTION IN 2022
FIGURE 4.9 CROP CONDITION CHINA NORTHEAST REGION JANUARY - APRIL 2022 185
FIGURE 4.10 CROP CONDITION CHINA INNER MONGOLIA LANUARY – APRIL 2022 186
FIGURE 4.11 CROP CONDITION CHINA HUANGHUAIHAL JANUARY - APRIL 2022
FIGURE 4.12 CROP CONDITION CHINA LOFSS REGION LANUARY - APRIL 2022
FIGURE 4.13 CROP CONDITION CHINA LOWER YANGTZE REGION JANUARY 2022 -
APRIL 2022
FIGURE 4.14 CROP CONDITION CHINA SOUTHWEST REGION JANUARY - APRIL 2022, 191
FIGURE 4.15 CROP CONDITION SOUTHERN CHINA REGION JANUARY - APRIL 2022 192
FIGURE 4.16 RATE OF CHANGE OF IMPORTS AND EXPORTS FOR RICE. WHEAT, MAIZE
AND SOYBEAN IN CHINA IN 2022 (%)
FIGURE 5.1 THE EFFECTS OF THE DROUGHT ON VEGETATION IN MOROCCO IN 2022
FORM SATELLITE IMAGES
(SOURCE: HTTPS://WWW.COPERNICUS.EU/EN/MEDIA/IMAGE-DAY-
GALLERY/EFFECTS-DROUGHT-VEGETATION-MOROCCO)
FIGURE 5.2 THE DEVASTATING IMPACTS OF FLOODS IN KWAZULU-NATAL PROVINCE
(KZN), SOUTH AFRICA, IN APRIL 2022 (HTTPS://FLOODLIST.COM/AFRICA/SOUTH-
AFRICA-KWAZULU-NATAL-FLOODS-APRIL-2022)
FIGURE 5.3 THE MUDSLIDES CAUSED BY FLOODS IN PETRÓPOLIS, RIO DE JANEIRO, IN
FEBRUARY 2022 (HTTPS://FLOODLIST.COM/AMERICA/BRAZIL-FLOODS-LANDSLIDES-
PETROPOLIS-MARCH-2022)
FIGURE 5.4 PROPERTIES INUNDATED BY FLOODS IN GOODNA, AUSTRALIA ON THE 2ND
OF MARCH,
2022 (HTTPS://WWW.NPR.ORG/SECTIONS/PICTURESHOW/2022/03/02/1083314101/P
HOTOS-RECORD-BREAKING-FLOODS-DEVASTATE-EASTERN-AUSTRALIA)
FIGURE 5.5 COUNTRIES, TERRITORIES, OR AREAS WITH REPORTED CONFIRMED CASES OF
COVID-19, THE 4TH OF APRIL 2020 (SOURCE: WORLD HEALTH ORGANIZATION) 202
FIGURE 5.6 THE NUMBER OF CASES INCREASED SIGNIFICANTLY BY THE START OF 2022
(SOURCE: JHU CSSE COVID-19 DATA)
FIGURE 5.7 MONTHLY SOI-BOM TIME SERIES FROM APRIL 2021 TO APRIL 2022 204
FIGURE 5.8 MAP OF NINO REGION(SOURCE:
HTTPS://WWW.NCDC.NOAA.GOV/TELECONNECTIONS/ENSO/SST)
FIGURE 5.9 MONTHLY TEMPERATURE ANOMALIES IN THE TROPICAL PACIFIC FOR
APRIL 2022
FIGURE 5.10 SHARE OF TOTAL WORLD EXPORTS FOR MAJOR FOOD-RELATED
COMMODITIES (2020). SOURCE: WORLD INTEGRATED TRADE SOLUTION, WITS
(2022)
FIGURE 5.11 THE SITUATION OF THE CONFLICT BETWEEN RUSSIA AND UKRAINE
FIGURE 5.12 THE DISTRIBUTION OF WINTER CROPS IN UKRAINE
FIGURE 5.13 FAO FOOD PRICE INDEX

| xi

Abbreviations

5YA	Five-year average, the average for the four-month period from January to April of
	for 2017-2021; one of the standard reference periods.
15YA	Fifteen-year average, the average for the four-month period from January to April
	for 2007-2021; 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
На	hectare
Kcal	kilocalorie
MPZ	Major Production Zone
MRU	Mapping and Reporting Unit
NDVI	Normalized Difference Vegetation Index
OISST	Optimum Interpolation Sea Surface Temperature
PAR	Photosynthetically active radiation
PET	Potential Evapotranspiration
AIR	CAS Aerospace Information Research Institute
RADPAR	CropWatch PAR agroclimatic indicator
RAIN	CropWatch rainfall agroclimatic indicator
SOI	Southern Oscillation Index
TEMP	CropWatch air temperature agroclimatic indicator
Tonne	Thousand kilograms
VCIx	CropWatch maximum Vegetation Condition Index
VHI	CropWatch Vegetation Health Index
VHIn	CropWatch minimum Vegetation Health Index
W/m²	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 2022, 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 125th such publication issued by the CropWatch group at the Aerospace Information Research Institute (AIR) 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. 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; and (ii) agronomic indicators—VHIN, CALF, and VCIx and vegetation indices, describing crop condition and development. (iii) 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.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, 42 major agricultural countries, and 217 Agro-Ecological Zones (AEZs).

Chapter	Spatial coverage	Key indicators
Chapter 1	World, using Mapping and Reporting Units (MRU), 65 large, agro-ecologically homogeneous units covering the globe	RAIN, TEMP, RADPAR, BIOMSS
Chapter 2	Major Production Zones (MPZ), six regions that contribute most to global food production	As above, plus CALF, VCIx, and VHIn
Chapter 3	42 key countries (main producers and exporters) and 210 AEZs	As above plus NDVI and GVG survey
Chapter 4	China and regions	As above plus high-resolution images; Pest and crops trade prospects
Chapter 5	Production outlook, and updates on disaster events and El Niño.	

This bulletin is organized as follows:

Regular updates and online resources

The bulletin is released quarterly in both English and Chinese. E-mail **cropwatch@radi.ac.cn** to sign up for the mailing list or visit CropWatch online at **www.cropwatch.cn**, **http://cloud.cropwatch.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 2022. It is prepared by an international team coordinated by the Aerospace Information Research Institute, Chinese Academy of Sciences.

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 agroclimatic 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 (the "core countries") while chapter 4 zooms into China. Special attention is paid to the production outlook of main crop producing and exporting countries where major cereal and oil crops (maize, rice, wheat and soybean) are harvested this year or currently still in the field. Subsequent sections of Chapter 5 describe the global disasters that occurred from January to April 2022.

Agroclimatic conditions and global warming

Temperatures keep raising, though at a slightly slower pace thanks to La Niña. While the global average increase in March was "only" 0.95°C over the 20th-century average, it nevertheless caused much larger increases at the regional scale. Temperatures in the northwest of India, as well as in the Punjab of Pakistan were above 35°C during the grain filling stage of wheat in March. This caused terminal heat stress and a yield reduction by 15-20% in some regions.

Deforestation in the Brazilian Amazon during the first three months of 2022 has increased by 64% compared to the same period last year. The total burned area in 2022 reached 43,000 ha, more than twice the average of the past ten years.

Ukraine, the commodity market and food security

Russia Ukraine conflict brought uncertainties to world food supply. Before the conflict, Ukraine used to export about 27 million tonnes of maize and 21 million tonnes of wheat. This represents a 11 to 13% share of the world market. It also is the second largest exporter of barley and the largest exporter of sunflower oil, with a market share of 40%. As shown in our special section on "The impact of the Russia Ukraine conflict on global food security," potential production levels for winter wheat are almost unchanged, due to favorable weather conditions – yet the conflict impacts farming operations, logistics and trade, and it is almost impossible to forecast the levels of commodity exports for the coming months. Partly due to the large uncertainties and fueled by speculators, commodity prices have risen sharply.

According to the remote sensing-based estimates, the winter crop area increased 3.8% in Ukraine, the production of winter crops increased 2.1% (520 thousand tonnes). The area increase of winter crops in the Donetsk and Luhansk regions of eastern Ukraine has led to a doubling of production in both regions. However, the conflicts bring uncertain for the coming harvest season.

Agroclimatic conditions and crop production

In the Northern Hemisphere, wheat was the dominant crop that was in the field during this period. It had reached maturity in India and Pakistan by March. In most other production regions, it was still in its vegetative growth phase at that time. The planting of spring wheat,

2 | CropWatch Bulletin, May 2022

soybean and rice had started or was already in full swing in most northern regions by late April. In South America, maize and soybean were the key crops to be monitored. The harvest of the first crop, mainly soybean, and the subsequent sowing of the second crop in Brazil took place in February, whereas the harvest of the main crop in the other South American countries was well advanced by April. Closer to the Equator, this report covers the end tail of the harvest of the main season rice crop and production of the winter rice crops (Boro/Kharif) in South- and Southeast Asia.

Global rainfall patterns were strongly affected by the current La Niña conditions. The largest rainfall deficits, exceeding more than -30%, as compared to the 15 year average, were observed for Central-Eastern Brazil, the West-Coast of North America, the Horn of Africa, as well as Afghanistan. Negative departures of rainfall, in the range of -30 to -10%, were also observed for a large region stretching from Morocco to Afghanistan. Most of the European part of Russia, most of China, as well as South-east Asia and Australia experienced rainfall that was at least 10% above average.

Impact of weather conditions on crops

Maize: Argentina and Brazil contribute about 40% to the maize that is being traded internationally. Conditions in Argentina were favorable. In Brazil, the regular, though below average rainfall ensured favorable conditions for the important second season (safrinha) maize. Hence, CropWatch estimates a production increase by 9% for Brazil and 2.9% for Argentina, amounting to a combined increase by roughly 11 million tonnes. Maize production during the rainy season in Africa south of the equator was negatively impacted by irregular rains, but production levels stayed close to average. However, Kenya was hit by a severe drought, causing a decline in production by 12.9%. Maize production in South and Southeast Asia benefitted from generally favorable conditions. Maize planting started in April in North America and Europe. So far, weather conditions have been favorable, although the weather has been cooler than normal in the USA and drier than normal in most of Western Europe. Total global production is forecasted at 1009 million tonnes (+0.8%).

Wheat: In China, wheat benefitted from favorable weather conditions in recent two months. The crop more than compensated for the delayed sowing in last fall. Nevertheless, there was a slight reduction in area, causing an overall reduction of production by 1.2%. A heat wave hit the northwest of India and the Punjab of Pakistan in mid March. The ensuing terminal heat stress caused a fast brown-down of the crops and shortened the grain-filling period. At the national level, this resulted in wheat production decreases by 4.9% to 25.57 million tonnes in Pakistan and by 2.8% to 93.24 million tonnes in India. Severe yield losses for the rainfed wheat production are forecasted for the drought stricken countries of the Maghreb, Near- and Middle East and Central Asia. Production in Morocco is estimated to have declined by 40%. The south of the USA is also affected by drought conditions. Significant yield reductions are to be expected for Texas, Oklahoma and Kansas. Abundant rain in recent weeks has caused rather favorable conditions for the upcoming planting period of wheat in Argentina, Brazil and Australia. CropWatch estimates a decline in global wheat production by 1% to 713 million tonnes, which continued the wheat decrease since 2021 and world wheat supply is still with tension.

Rice: Conditions for winter (Rabi) season rice production were generally favorable in India, the largest rice exporter. Production is estimated to increase by 1.5% year on year. Conditions were also favorable in Bangladesh (+4.2%) and Vietnam (+1.7%), whereas a slight decrease in production by -0.7% is forecasted for Thailand. Conditions for the other important rice producing countries

and regions, such as the Philippines (-0.2%) and Indonesia (+3.1%) were average or above. CropWatch forecasts a slight increase of total global rice production by 0.7% to 769 million tonnes.

Soybean: Argentina, Brazil, Paraguay and Uruguay produce more than half of the world's soybeans traded on the international market. Conditions in Brazil for soybean production were unfavorable due to drought conditions from October to December. CropWatch forecasts a decline by 7.4% to 89 million tonnes, whereas for Argentina, a slight increase by 0.3% to 51 million tonnes is expected. In the USA, Canada and the Ukraine, soybean sowing started at the end of this monitoring period, in late April. Soil moisture conditions are mostly favorable in these countries, but the war causes high uncertainties for the Ukrainian production. Conditions in May will determine the area planted and crop establishment. CropWatch foresees a decline in global soybean production by 3.3% to 310 million tonnes.