

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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No Rain in Spain Falling on the Plain

Report Categories:

Grain and Feed

Oilseeds and Products

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Report Highlights:

Dry weather delayed winter grains plantings in Spain and the continuing lack of precipitation in key growing areas might lead to changes in farmer's spring planting decisions. While there is not a major concern over grains output yet, considering the low quantity of snow in the mountaintops, the low soil moisture and the reduced water availability in the country's reservoirs, the amount of precipitation in February and throughout spring will be particularly critical in determining final yields.

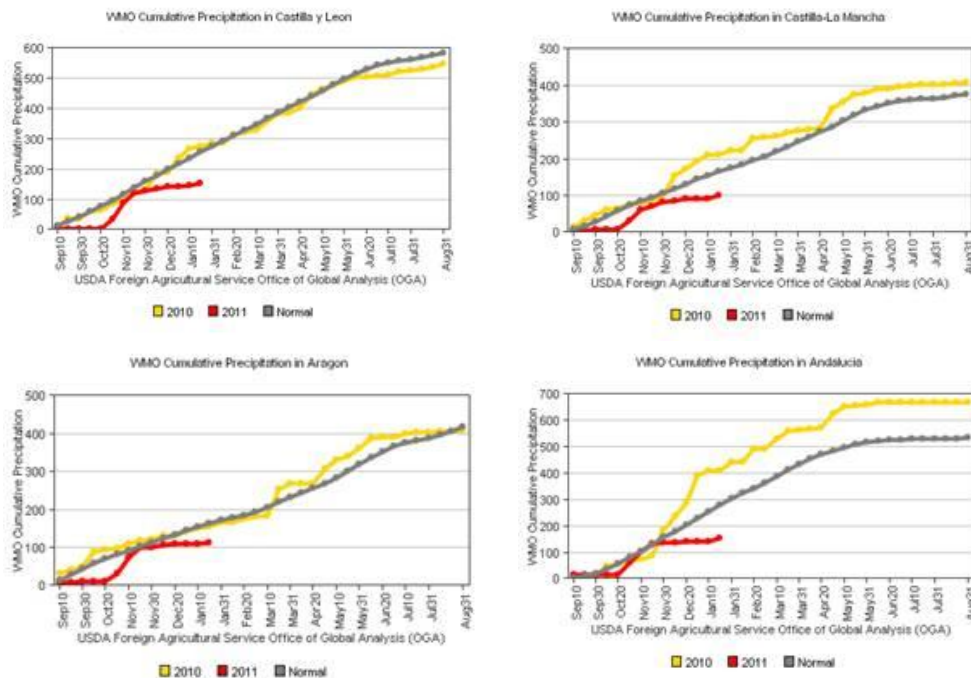
Weather conditions

Since the beginning of the hydrological year 2011/12 (October/September) precipitation has been significantly low in Spain's main grain producing regions. Precipitation has also been poorly distributed across time, with very little rainfall in December and January. According to meteorological data, rainfall throughout fall was around 30 percent below the historical average. It has caused dry soil conditions and delays in winter plantings. Lack of rains has also resulted in low water reservoir levels and in the soil.

Spain's Meteorological Agency (AEMET) has recently announced that the country is entering a period of "meteorological drought" after consecutive months of low or absence of rainfall. It could result in a serious drought if the month February and the spring, does not bring enough water to the crops.

The regions of Castile y Leon, Castile-La Mancha, Aragón and Andalucía account for nearly 80 percent of Spain's total grain production. **Graph 1** shows how rainfall levels throughout the beginning of the grain growing season in those regions have been not only below the previous year, but also below normal, according to WMO (World Meteorology Organization). Amounts of rainfall in Spain at the end of October facilitated plantings but were insufficient to replenish the soil reservoirs. Additional precipitation occurred in the second half of January, but again the amount of rainfall was too light to improve soil dry conditions.

Graph 1. Cumulative precipitation in main grain producing regions.



Source: IPAD/Foreign Agricultural Service/USDA

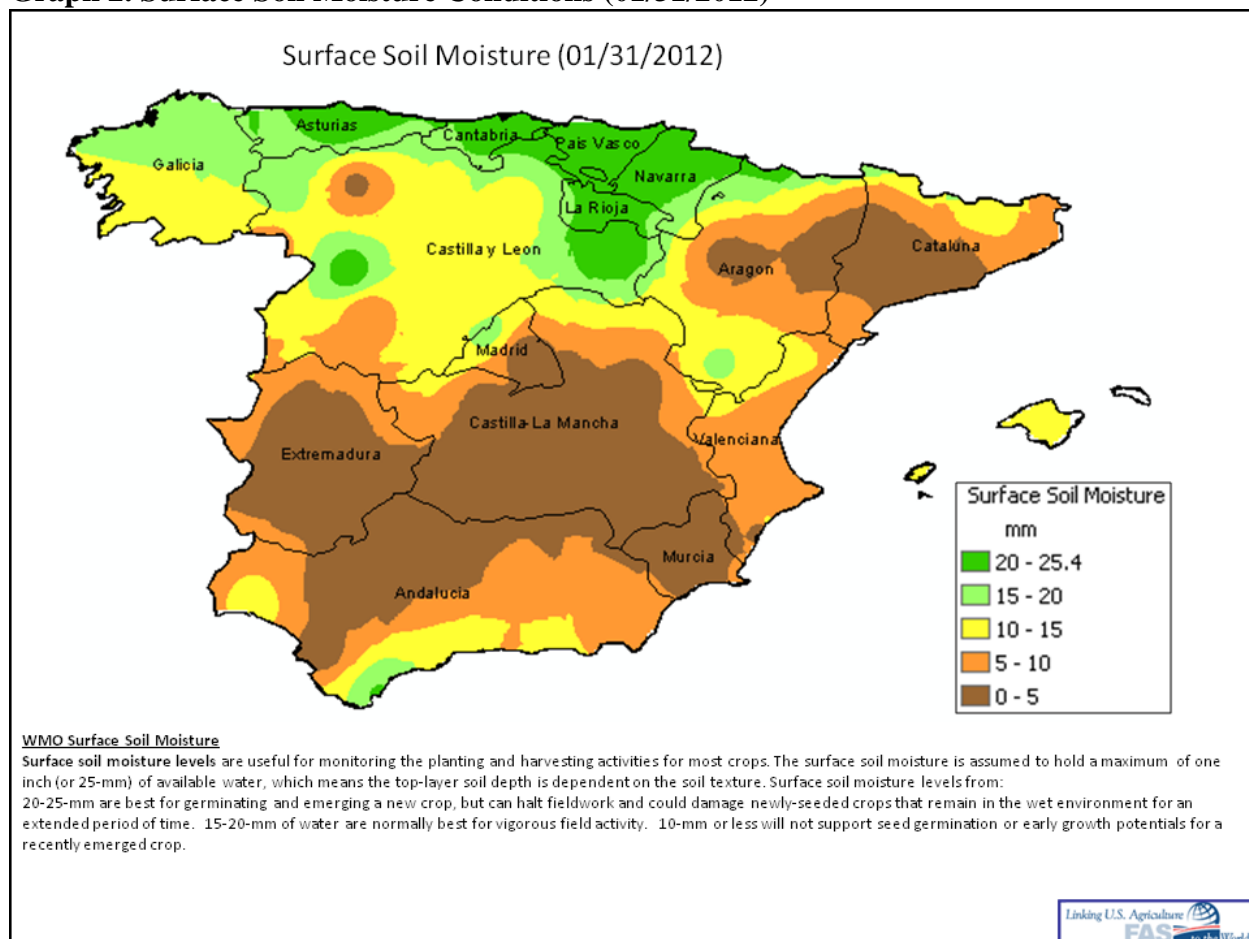
Winter temperatures were rather mild during the fourth quarter of 2011, reaching average temperatures that exceeded Spain's historical average by 1.8 °C. On the contrary, low temperatures throughout January are contributing to keep crops in dormancy and preventing them from being damaged by the lack of water.

The lack of snow in the mountaintops constitutes also a problem since it constitutes an important source for replenishing water reservoirs in spring and summer.

Water reservoirs situation: Soil and Dams

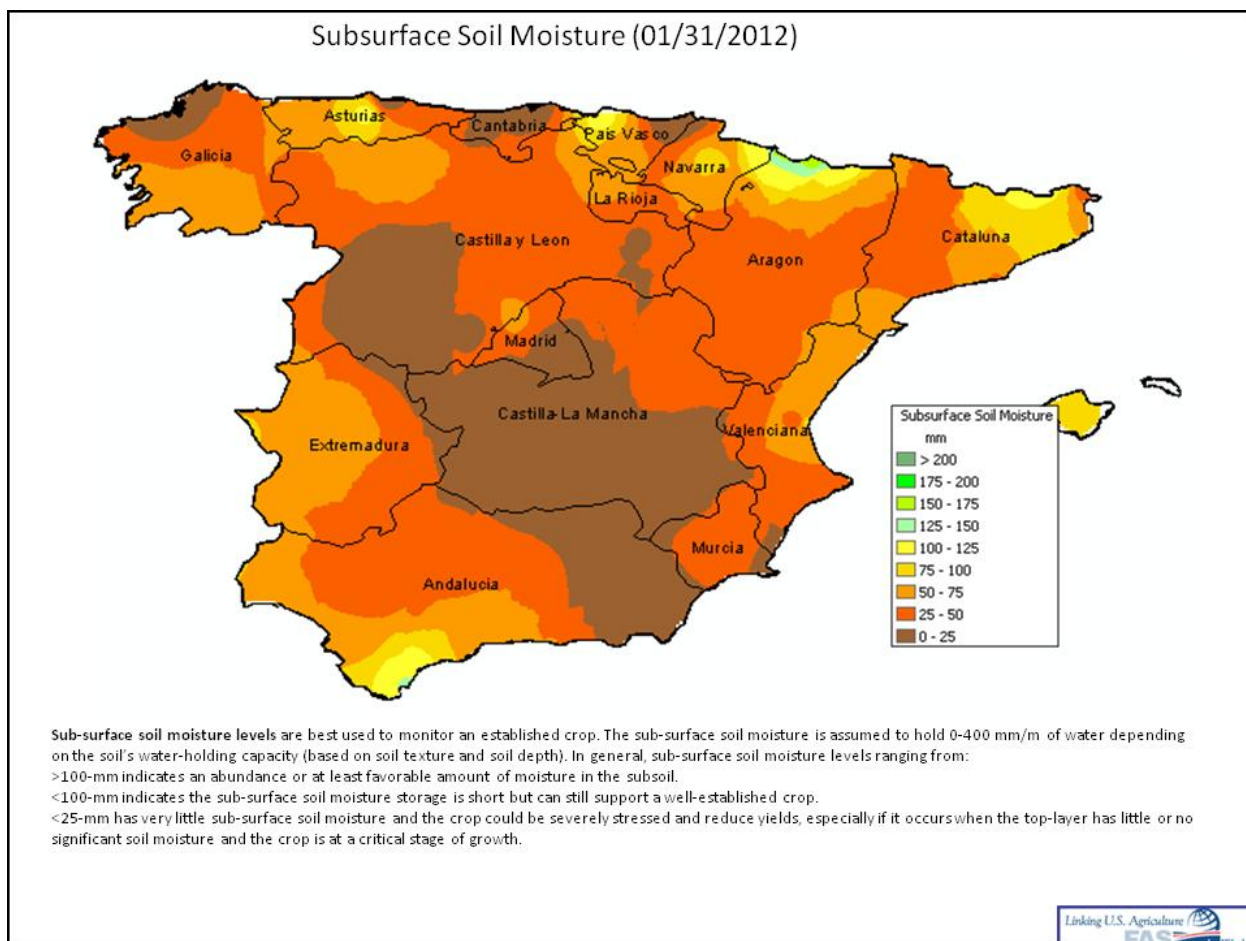
Surface (Graph 2) and subsurface soil moisture (See Graph 3) is fairly low in the main Spanish grain production areas. At the end of January dam water reservoirs in Spain were at 62 percent of the total capacity, which represent 15 percent less than previous year and 5 percent over the ten-year average.

Graph 2. Surface Soil Moisture Conditions (01/31/2012)



Source: IPAD/Foreign Agricultural Service/USDA

Graph 3. Subsurface Soil Moisture Conditions (01/31/2012)



Source: IPAD/Foreign Agricultural Service/USDA

Impact in crop development and spring planting decisions

According to Ministry of Agriculture, Food and Environment preliminary estimates, the area planted to grains for MY 2012/13 is expected to remain fairly stable compared to previous season.

Dry, warm weather in early fall in Spain delayed fieldwork operations to prepare winter sowings due to low soil moisture conditions. On the other hand, the dry and mild weather in early fall and winter favored cotton, corn, sugar beet and olive harvests, which were carried out earlier than usual in the season.

Timely rains in late October improved soil moisture later in the season. The volume of rain was sufficient for the winter grains establishment prior to dormancy. Following the delayed plantings, dry conditions have prevailed in most of the Spain's grain growing regions up to present. While deep concerns over yields have not sparked yet, water availability throughout spring is seen as critical for final yields.

Spring sowing of grains and oilseeds in Spain include **sunflower, corn, rice and cotton**. Also some land is planted to **wheat and barley** in the spring. Should the lack of water prevail; it might result in poor

spring planting conditions and a change in the plantings pattern. Soil moisture content could be too low for the proper establishment of spring plantings and corn planting expectations may be reduced since farmers might switch from **corn** to less water demanding crops such as **wheat** in the northern half of the country or **sunflower** in the south.

Cotton production is concentrated in the provinces of Seville and Cadiz. Irrigation – the reliance on reservoirs - covers 76 percent of the cotton area, so plantings are expected to remain at similar levels as last year.

While the water availability in Andalucía, the major **rice** producing region, would allow for maximum planting levels, a decline in rice plantings could take place in other areas such as the Ebro Valley where enough water supply is not guaranteed yet.

It is still too early to assess the impact on grain and oilseed crops, since similar weather patterns have resulted in good crops, being MY2007/08 the most recent example. Nevertheless, should the low level or absence of rainfall continue throughout February and spring it might result in a lower domestic crop. Lack of rain might also affect pasture availability and extensive livestock farmers would need to supplement their animals with feed. In this scenario, additional feed grains imports would be required.