

Voluntary Report – Voluntary - Public Distribution

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Report Name: Czech Republic Sees Solid Harvest Despite Initial Drought

Country: Czech Republic

Post: Prague

Report Category: Agricultural Situation, Agriculture in the News, Biofuels, Climate Change/Global Warming/Food Security, Grain and Feed, Oilseeds and Products, Agriculture in the Economy

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Report Highlights:

The harvest of grains and rapeseed in the Czech Republic ended in the first week of September. Estimates are optimistic that the production of grains will reach above the 10-year average. The Czech Statistical Office estimates the average yield of grains (excluding corn) at 5.63 MT/HA and rapeseed yield at 3.11 MT/HA, while the Czech Ministry of Agriculture reports grain yield (excl. corn) at 6.06 MT/HA and rapeseed 3.42 MT/HA, based on harvest monitoring.

General Information

MT = Metric Ton

HA = Hectares

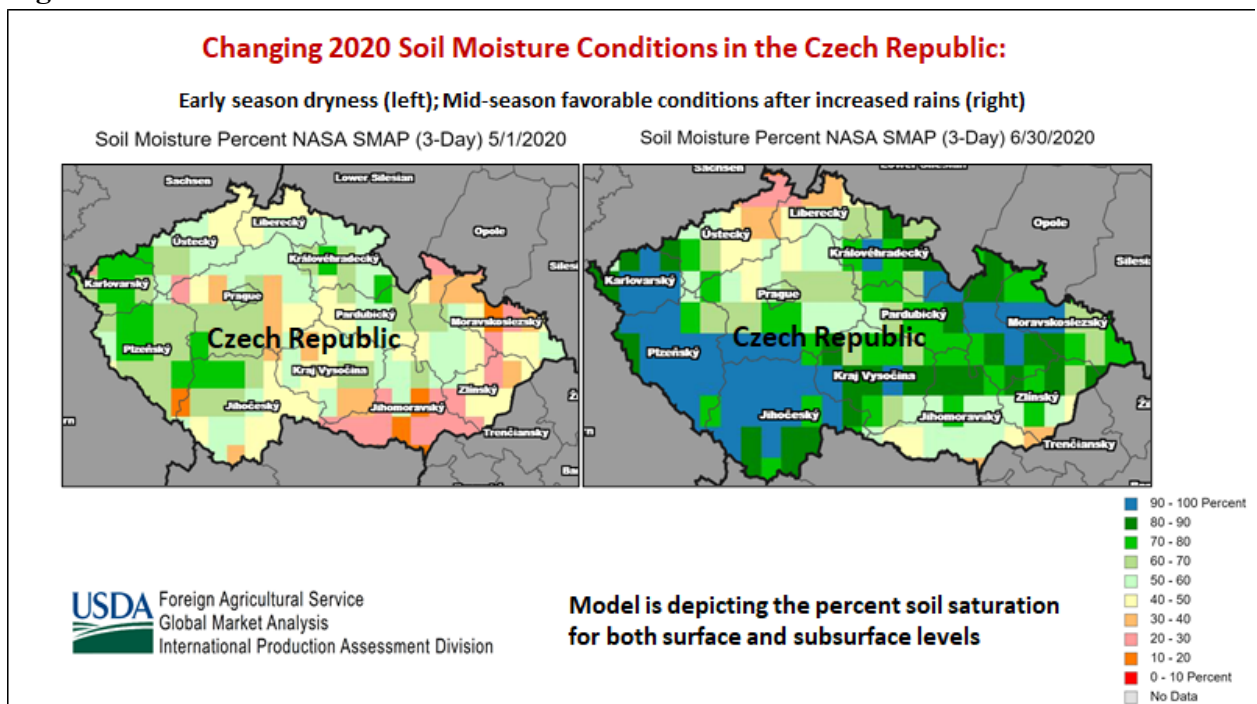
MY = Marketing Year. Post and USDA official data both follow the EU28 local marketing year of July to June

Production

Despite severe drought at the beginning of the season (Figure 1), the final harvest turned out well. In some regions (primarily South Moravia) the dryness was so intense it killed young grain plants. Czech experts described the drought as the worst in 500 years.

Later in the season, however, increased precipitation significantly improved vegetation conditions (Figure 2). At the end of May the rainfall increased, and in June, July, and August it exceeded the long-term average (Figure 3,4,5).

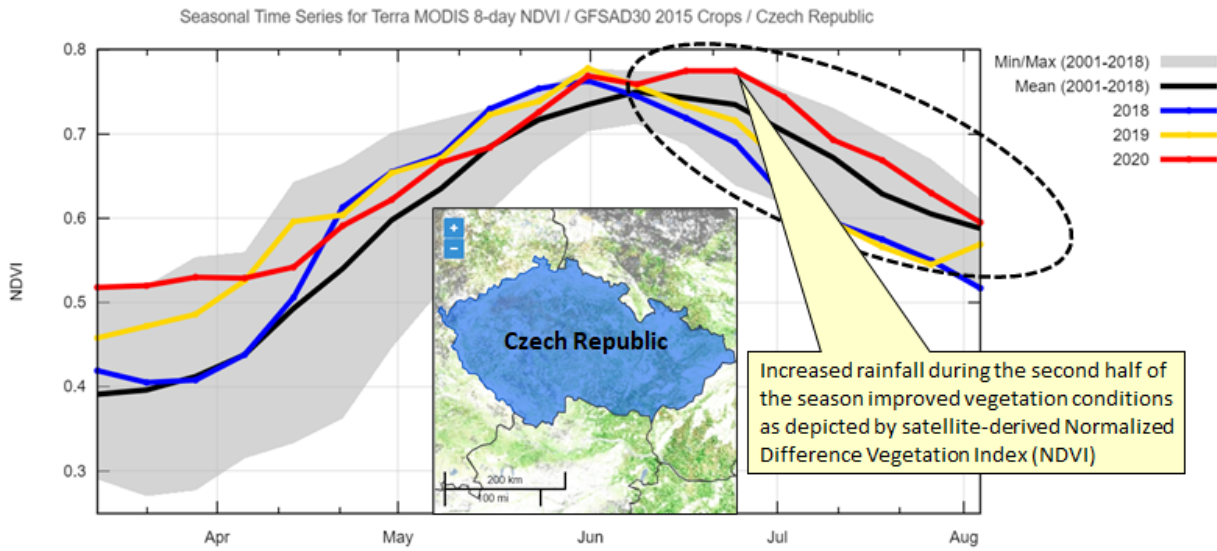
Figure 1



Source: USDA/FAS/GMA/IPAD

Figure 2

NDVI Depicts Favorable Late-Season Improvement in the Czech Republic

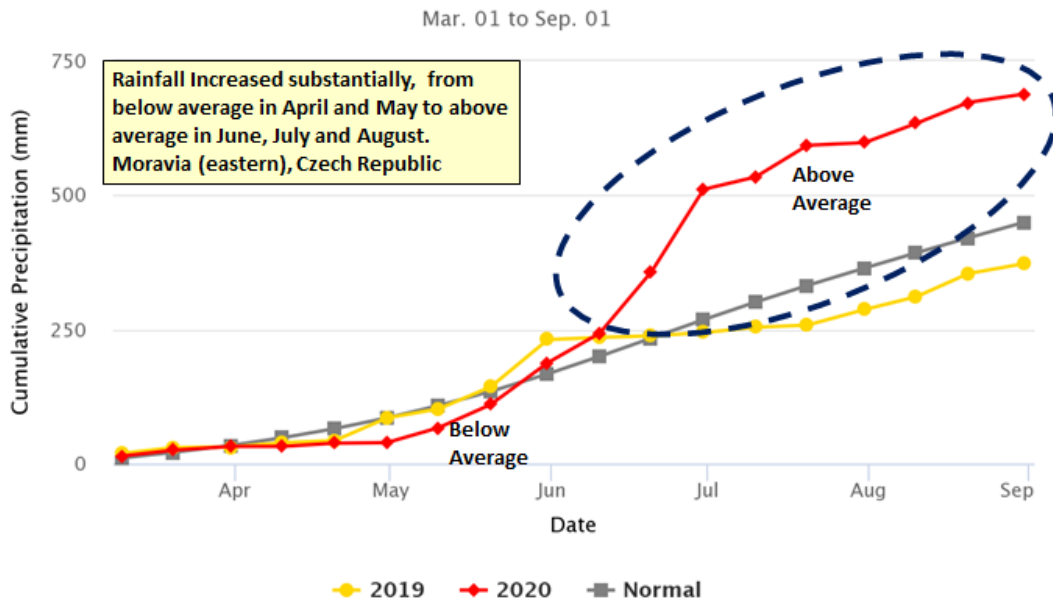


Source: USDA/FAS/GMA/IPAD

Seasonal Precipitation for Major Czech Growing Areas

Figure 3

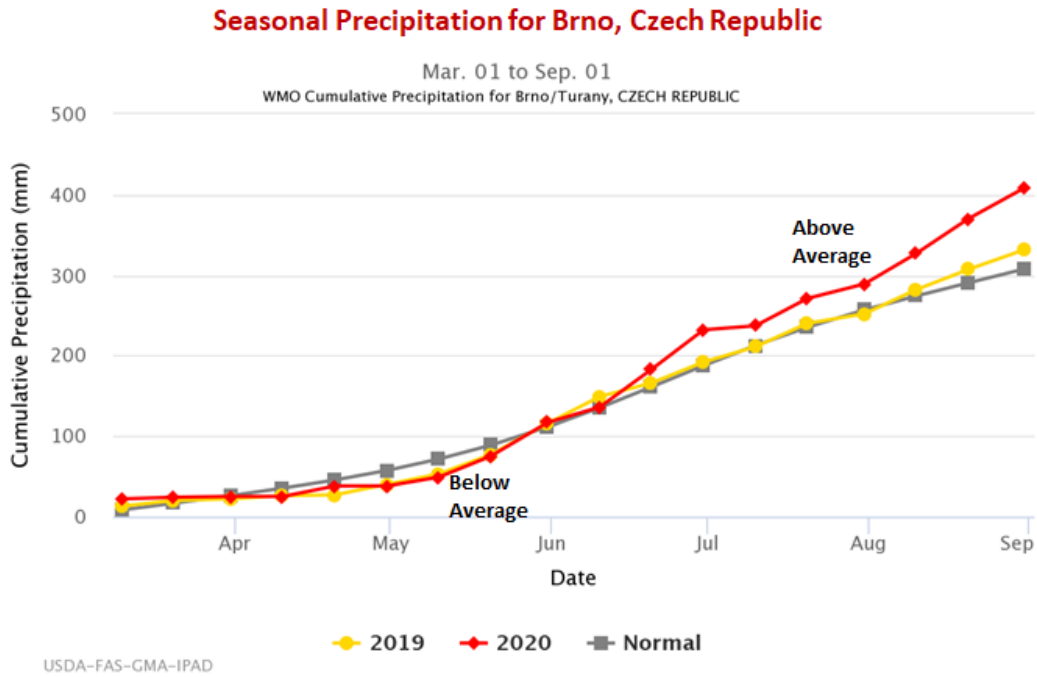
WMO Cumulative Precipitation for Ostrava/Mosnov, CZECH REPUBLIC



USDA-FAS-GMA-IPAD

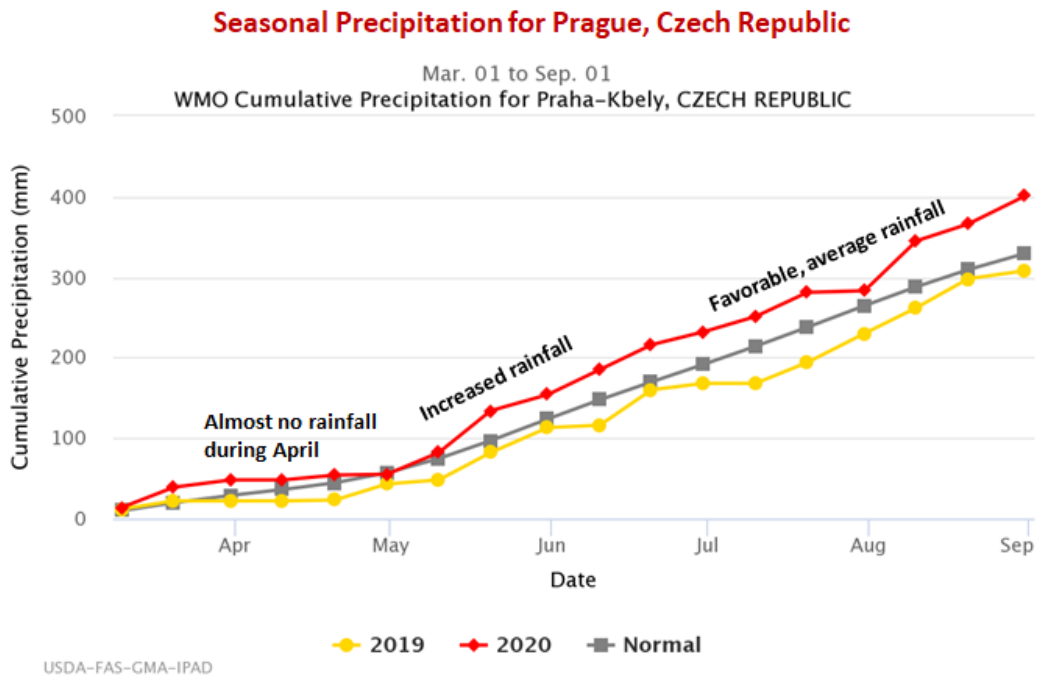
Source: USDA/FAS/GMA/IPAD

Figure 4



Source: USDA/FAS/GMA/IPAD

Figure 5



Source: USDA/FAS/GMA/IPAD

Source:

The Czech Statistical Office estimates the total MY20/21 grain crop (excluding corn) at 7 million MT, which is 0.4 percent higher when compared year on year. While the total area decreased by 1.7 percent, the hectare yield rose by 2 percent reaching, 5.63 MT/HA in MY20/21.

Wheat is the only grain that shows a decrease in production in this marketing year (MY20/21). When compared to the previous MY19/20, wheat production is down by 2 percent. The increased yield (+2.9 percent) did not offset the five percent drop in area. Wheat quality is satisfactory but varies significantly across regions. Even though there should be a sufficient amount to cover domestic milling demand, the prices of milling wheat are already rising.

Barley production in MY20/21 is up by 4.5 percent from the previous year, thanks to higher area and an increased yield. Barley quality, however, is not satisfactory for malting purposes.

The Czech Statistical Office will publish its next estimates, including corn production, in October. Production estimates for all other grains are listed in Table 1 below.

Table 1 Czech Statistical Office July Crop Estimate

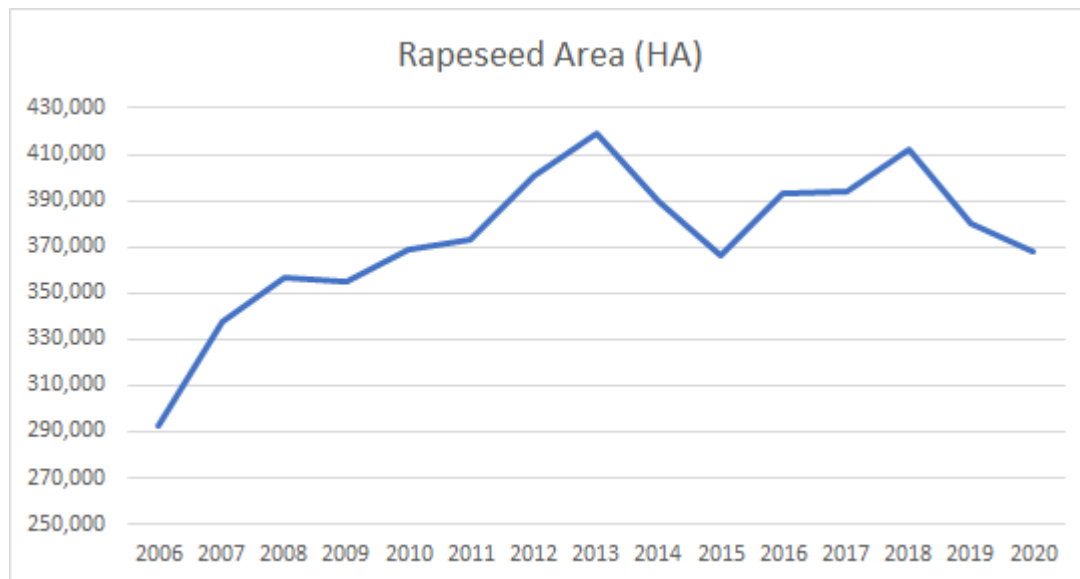
| Year/ Crop | Planted Area (1,000 HA) | | Production (1,000 MT) | | Yield (MT/HA) | |
|---------------|---------------------------|---------------------------|---------------------------|---------------------------|-------------------------|-------------------------|
| | CZSO Final Harvest Data*) | CZSO July 2020 Estimate*) | CZSO Final Harvest Data*) | CZSO July 2020 Estimate*) | CZSO Final Harvest Data | CZSO July 2020 Estimate |
| | MY19/20 | MY20/21 | MY19/20 | MY20/21 | MY19/20 | MY20/21 |
| Grains | 1,272 | 1,251 | 7,018 | 7,045 | 5.52 | 5.63 |
| Wheat | 839 | 799 | 4,812 | 4,711 | 5.73 | 5.90 |
| - winter | 815 | 775 | 4,716 | 4,600 | 5.79 | 5.94 |
| - spring | 25 | 24 | 96 | 110 | 3.84 | 4.61 |
| Barley | 320 | 332 | 1,718 | 1,796 | 5.38 | 5.41 |
| - winter | 108 | 115 | 644 | 664 | 5.98 | 5.79 |
| - spring | 212 | 217 | 1,074 | 1,796 | 5.07 | 5.21 |
| Oats | 43 | 47 | 134 | 166 | 3.16 | 3.54 |
| Rye | 31 | 31 | 158 | 161 | 5.06 | 5.13 |
| Triticale | 40 | 42 | 195 | 211 | 4.93 | 5.02 |
| Rapeseed | 380 | 368 | 1,157 | 1,145 | 3.05 | 3.11 |
| Poppy Seed | 36 | 40 | 24 | 29 | 0.66 | 0.72 |

Source: Czech Statistical Office

*) Values were rounded by the FAS office.

The rapeseed harvest is estimated to be down one percent from the previous year. The sole reason for the production decline in MY20/21 is a three percent drop in area. The yield is estimated at 3.11 MT/HA, which is two percent higher when compared to the previous year.

Area under rapeseed production in the Czech Republic grew steadily over the years, peaking in 2013. Biodiesel production fueled this growth by contributing to the higher profitability of the crop. In recent years, however, the European ban of neonicotinoids use made rapeseed production more challenging, increased costs, and thus made it less attractive for farmers. Further decline in area is foreseen.



The crop estimates from the Ministry of Agriculture’s Harvest Progress Report through August 31 are even more optimistic than those of the Czech Statistical Office. The harvest of grains from the area harvested is estimated at 7.5 million MT in MY20/21, with yield reaching 6.06 MT/HA. Higher yields are recorded for all grains and for rapeseed as well, when compared to the estimates of the Czech Statistical Office. Total rapeseed production came at 1.3 million MT. For more details about other grains, please see the Table 2 below.

Table 2 Czech Ministry of Agriculture Harvest Progress report through August 31

| | Area*) to be Harvested (1,000 HA) | Percentage of Area Harvested to Date | Average Yield (MT/HA) | Production*) (1,000 MT) |
|-------------------|-----------------------------------|--------------------------------------|-----------------------|-------------------------|
| Year/ Crop | MY20/21 | | | |
| Grains | 1,251 | 99.23 | 6.06 | 7,516 |
| Wheat | | | | |
| - winter | 775 | 99.46 | 6.37 | 4,908 |
| - spring | 24 | 98.39 | 4.91 | 116 |
| Barley | | | | |
| - winter | 115 | 99.99 | 6.22 | 713 |
| - spring | 217 | 99.26 | 5.42 | 1,168 |
| Oats | 47 | 96.50 | 4.45 | 201 |
| Rye | 31 | 98.35 | 5.76 | 178 |
| Triticale | 42 | 97.10 | 5.70 | 233 |
| Rapeseed | 368 | 100 | 3.42 | 1,260 |

Source: Czech Ministry of Agriculture

*) Values were rounded by the FAS office.

Quality of grains, based on tests of the basic grain parameters, is described by the Ministry of Agriculture's report as satisfactory. However, it notes a large variability for wheat and rather lower quality for barley. A shortage of malting barley on the Czech market can be expected.

Trade

Foreign trade in major crops is shown in the following tables. Patterns of trading partners do not significantly change. The major export markets for Czech grains and rapeseed remain Germany and Poland.

Table 3 Czech Republic's Wheat Exports

| Partner Country | (1,000 MT) | |
|-----------------|--------------|--------------|
| | MY18/19 | MY19/20 |
| World | 1,783 | 2,237 |
| Germany | 1,310 | 1,665 |
| Poland | 241 | 171 |
| Austria | 164 | 301 |
| Italy | 50 | 46 |

Source: Czech Statistical Office Foreign Trade Database

Table 4 Czech Republic's Barley Exports

| Partner Country | (1,000 MT) | |
|-----------------|------------|------------|
| | MY18/19 | MY19/20 |
| World | 276 | 257 |
| Germany | 150 | 151 |
| Slovakia | 67 | 51 |
| Austria | 32 | 18 |
| Poland | 21 | 34 |

Source: Czech Statistical Office Foreign Trade Database

Table 5 Czech Republic's Rapeseed Exports

| Partner Country | (1,000 MT) | |
|-----------------|------------|------------|
| | MY18/19 | MY19/20 |
| World | 461 | 312 |
| Germany | 302 | 195 |
| Poland | 151 | 113 |
| Slovakia | 6 | 3 |

Source: Czech Statistical Office Foreign Trade Database

For related reports and more information on the situation on the European Union's grain and feed and oilseeds market please search our database here: <http://gain.fas.usda.gov> or use the following links:

[The Czech Republic Experiencing the Worst Drought in 500 Years Prague Czech Republic 05-19-2020](#)

[EU Eliminates Grain Import Duties Brussels USEU European Union 08-31-2020](#)

[Oilseeds and Products Update Vienna European Union 08-26-2020](#)

[Grain and Feed Annual London European Union 04-15-2020](#)

[Oilseeds and Products Annual Vienna European Union 04-01-2020](#)

Attachments:

No Attachments.