

Voluntary Report – Voluntary - Public Distribution

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Report Name: Grain Supply Chain Actors Agree on Drastic Crop Decline in Spain

Country: Spain

Post: Madrid

Report Category: Grain and Feed

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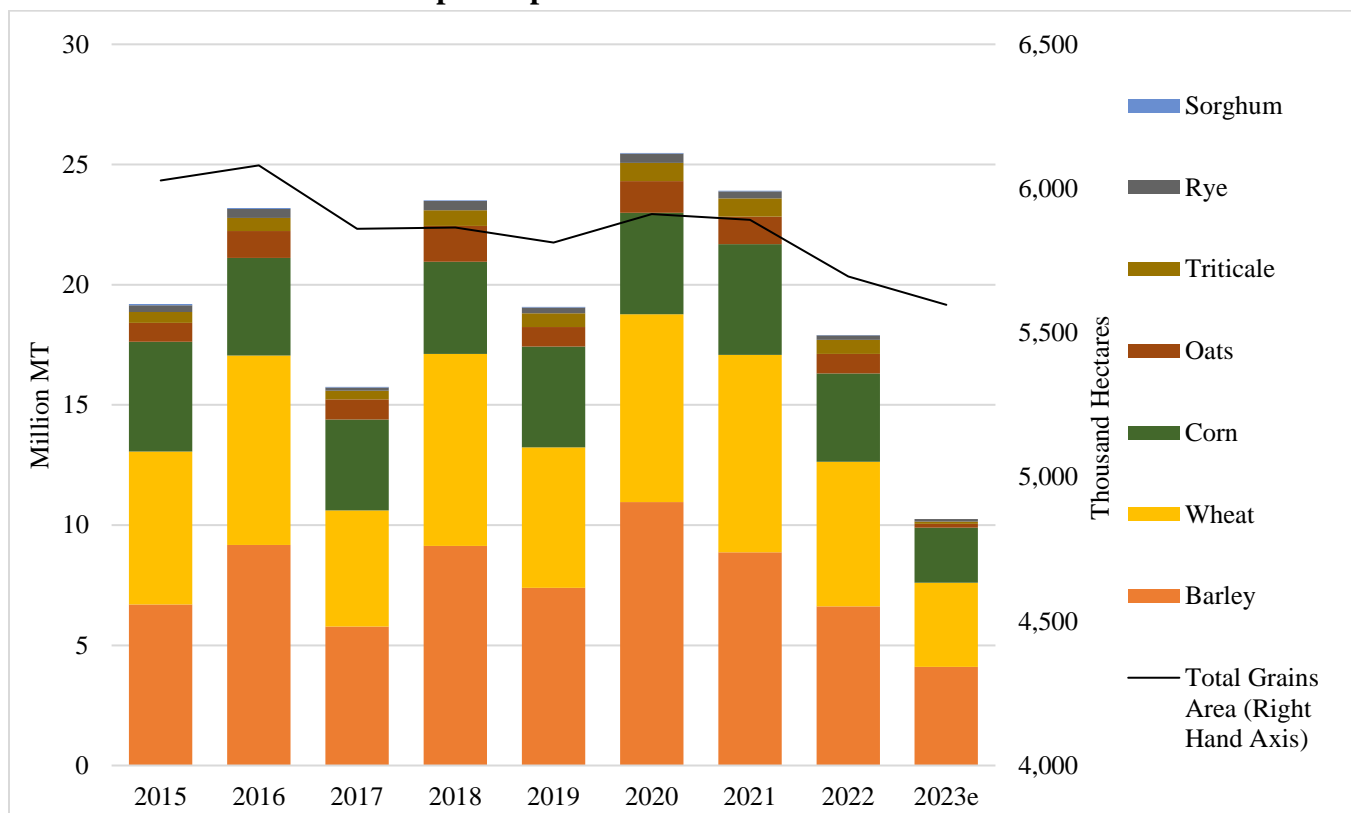
Report Highlights:

Several Spain grain supply chain actors have released their first estimates for grain production for MY 2023/24 and concur with the poor crop prospects. The initially good crop projections following the abundant rains in December were negated by dry conditions and above average temperatures registered throughout the grain growing season. Late May precipitation was not sufficient to counter the drop in production, although it may ultimately help restore soil moisture and alleviate the tight water storage levels.

Latest official area statistics by Spain’s Ministry of Agriculture, Fisheries and Food (MAPA) peg winter area at 5.2 million hectares. In the case of corn, which is largely grown under irrigation, official sources project 318 thousand hectares, whereas some industry sources are more pessimistic and estimate barely 250 thousand hectares of grain corn.

Spanish total grain production (including winter grains and corn) in MY 2023/24 is anticipated to decline to well below the historical average and may even set a record low level. Although official estimates are more optimistic, industry sources (**Table 1**) concur that winter grains production will be well below last year’s figure and average levels in all growing regions. Spain’s MY 2022/23 total grain output, including corn, could be as low as just slightly over 9 MMT.

Graph 1. Spain Grain Area and Production



Source: Spanish Ministry for Agriculture, Fisheries and Food, and FAS Madrid estimates.

Table 1. Spain's Winter Grain Production Estimates (1,000 MT)

Crop	MAPA	EU Commission	ASAJA	Infomarket	ACCOE*	CESFAC	Cooperatives	FAS Madrid
Wheat	6,080.9	4,445	2,336	-	3,284	3,800	3,194	3,500
Soft	5,405.3	3,956	2,120	3,275	2,925	-	2,876	3,200
Durum	676.6	489	216		359	-	318	300
Barley	6,824.6	5,288	2,410	3,814	3,419	4,100	3,610	4,100
Oats	808.8	1,025	123	-	277	-	123	150
Rye	229.6	153	31	-	101	-	32	100
Triticale	601.4	444	103	-	239	-	108	100
Winter Grains	14,545.2	11,355	5,003	N/A	7,320	N/A	7,067	7,950
Corn	-	2,928	-	3,390	-	2,800	2,038	2,500
Total Grains	N/A	14,283	N/A	N/A	N/A	N/A	9,105	10,450

Sources: MAPA (Spanish Ministry for Agriculture, Fisheries and Food), EU Commission, ASAJA (Young Farmers Union), Infomarket (Private Market Analyst), ACCOE (National Grain Elevators) CESFAC (Compound Feed Manufacturers Association) Agricultural Cooperatives and FAS Madrid estimates.

*Preliminary data

For additional information regarding the grain supply and demand situation in Spain, please consult GAIN Report [Grain Production Decline to Test Supply Chain Logistics Resilience in Spain](#).

If poor crop projections materialize, in the context of stable demand, Spain total grain import needs may exceed 23 million MT.

Attachments:

No Attachments.