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Report Name: Grain and Feed Update

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Report Highlights:

Post doe snot anticipate major changes to forecast and estimate for Algeria's cereal production. Post anticipates that Algeria's wheat imports will surpass nine million metric tons (MMT) next season. However, for this season, Post revised the estimate for Algeria's wheat imports down, owing to a decrease in Russian supply, and French shipments being reduced to zero. As a result of lower imports, stocks are also expected to decrease.

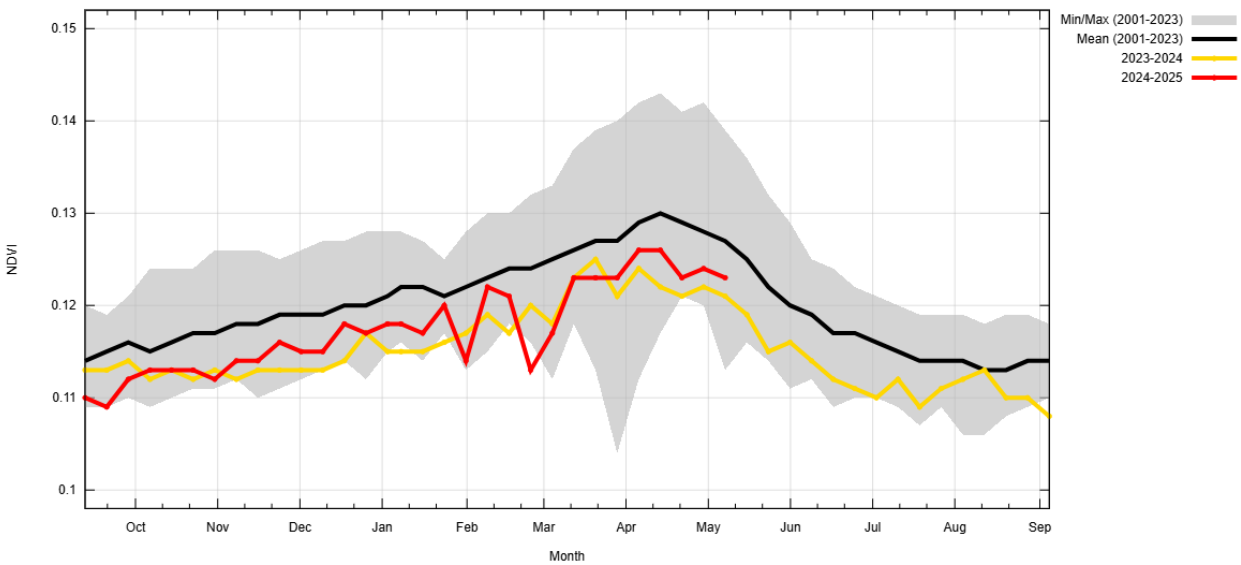
Production Update

Post anticipates that Algeria's wheat and barley harvested areas for the 2025/26 marketing year (MY) will remain at around two million hectares (ha) for wheat and one million ha for barley – same as in the previous season. According to the Ministry of Agriculture Algerian farmers are expected to collect crops from nearly 150,000 ha in the Sahara, which would be 40,000 ha more than last season. The Ministry did not clarify whether all 150,000 ha were planted with wheat, or whether other crops were included in this estimate. Overall, Ministry of Agriculture announcement falls within Post estimate that about five to eight percent of Algerian cereal crop land is cultivated in the desert.

Most of the wheat crops are grown in the coastal Mediterranean zones and the high plateaus where fields are generally rain irrigated and thus dependent on the weather. Based on satellite soil moisture data, Post forecasts that Algeria's wheat production will likely remain below average for the 2025/26 MY at three million metric tons (MMT). Post revised slightly upwards the forecast barley production for 2025/26 MY to 1.35 MMT as the rains were most prolific in barley growing areas this spring.

The NDVI chart below shows that on average Algeria experienced very dry conditions at the start of the planting campaign in October 2024. As planting drew to a close in January 2025, soil moisture conditions improved to surpass last season's campaign but remained below the mean weather conditions recorded over the last 20 years.

Figure 1: Algeria –– Relative Crop Conditions (Modis NDVI 8--Day), October-- September



**Note that the 2024/25 red line refers to the crop planting, growing period, and harvest dates and not the USDA marketing year. As such, the 2024/2025 redline reflects crop conditions for the USDA 2025/26 MY crop.*

The growing season runs from January to mid-May during which time Algeria received variable amounts of rain tracking conditions seen last season until early April, with scant rains with wheat fields showing worrying signs of drying out. Moisture levels increased over the last six weeks, which should improve yields in the more fertile regions and shore up crops in marginal areas. However, with rainfall continuing into mid-May, there is risk of spreading diseases and difficult harvest logistics. As a result, Post expects that harvest volumes will track closely with volumes produced last season.

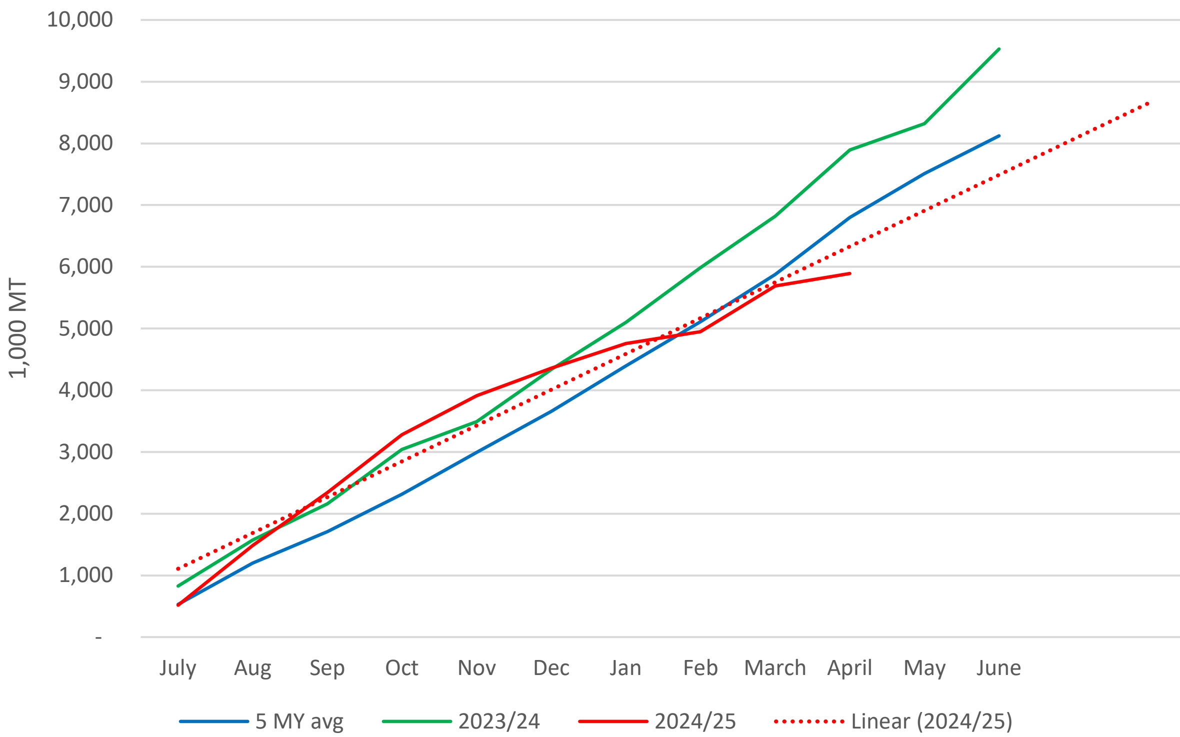
The Ministry of Agriculture has not released topline wheat and barley production forecast for the 2025/26 season. However, the Algerian press reported Ministry forecasts for Algeria's south to come in at over 3 million quintals (equivalent to about 300,000 MT), with yields buoyed by pivot irrigation. The Ministry of Agriculture forecasts wilayas of El Menia and Adrar to each harvest just under 100,000 MT, wilayas of Timimoun and Ourgala to contribute just over 35,000 MT apiece, with Biskra and El Oued harvesting 25,000 and 21,000 MT respectively. If the forecast is correct, the Southern region would account for about 10 percent of the national production of three MMT.

Trade Update

Post forecasts for wheat imports for the 2025/26 marketing year (MY) – July 2025 through June 2026 - remains unchanged at 9.2 million metric tons (MMT). Post forecast considers the projected national harvest; traditionally, Algeria's wheat imports are a function of shortfalls in production. Post forecast also incorporates the revised lower import estimate for the current season. Post believes that with draw down on stocks in the current season, Algeria will likely seek to shore up its purchases in the new season.

For MY 2024/25, Post revised down estimates Algeria's wheat imports to 8 MMT down from initially expected 9.2 MMT, based on slower pace of shipping in recent months. For the first ten months of the 2024/25 MY, Algeria's wheat shipments amounted to just about six MMT, if accounting for the estimated Russian wheat exports which are not reported through the Trade Data Monitor. Particularly in March and April, Algeria's imports for wheat appear to be just around one MMT, whereas in the same two months last year and the year before Algeria's wheat imports averaged 1.8 MMT. Given the increasingly slow pace of trade, Post believes that Algeria will likely import just two MMT in the remaining months of the MY. The decrease in Algerian imports stems from the decline of shipments from Russia and from France.

Algeria's Cumulative Monthly Wheat Imports



Source: Data from TDM, Reuters Refinitiv and private industry sources. Chart FAS Algiers

According to Reuters Refinitiv data, the last of Russian wheat shipments arrived in Algeria in December 2024. This is most likely due to limited supplies in Russia before their winter wheat harvest comes online later in the year. Russia has an export quota of 7.9 million tons which was set on February 15 and will last until June 30. In the last two seasons Russia has emerged as a leading supplier of wheat to Algeria. In 2023/24 MY, Russia shipped 2.4 MMT of wheat to Algeria, of which 1.9 MMT were shipped in the first 10 months of the season. In the first ten months of the current season Russian wheat exports to Algeria amounted to 1.7 MMT and are unlikely to top off before the season ends.

Meanwhile, Algeria has completely turned away from the French wheat. Historically, France was the leading wheat exporter to Algeria, and while in recent years its shipments have reduced in favor of Russia, it remained a key supplier to Algeria. Five seasons ago, France was supplying as much as six MMT to Algeria; for the 2023/24 MY, France exported 1.6 MMT of wheat to Algeria. This season, shipments have been completely zeroed out. In the fall of 2024, press reported that Algeria excluded French companies from the OAIC wheat purchase tenders in the wake of diplomatic tensions between the two countries. Local press reports suggested that Algeria had been forgoing French wheat contracts as of late July 2024. Meanwhile, the OAIC had issued a statement highlighting that it had restricted tenders on technical grounds linked to industrial needs and noted that it treats all suppliers fairly.

For barley, Post lowered the forecast imports to 550,000 MT for the 2025/26 MY on the expectation on better harvest. The revised forecast also accounts for the fact that Algerian barley imports are highly correlated with domestic production. Post maintains its barley import estimate for the 2024/25 MY.

Stocks Update

Post revised downward its forecast and estimate for Algeria's wheat stocks for next and current seasons. For MY 2025/26, Post expects Algeria's stocks at just over 5.2 MMT, lower than initially forecast because of the knock on effects from lower imports in the current season. For MY 2024/25, Post estimates stocks lower by one MMT, at around five MMT, directly as a result of lower wheat imports expected this season.

Table 1: Wheat, Production, Supply and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Algeria	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1800	2000	1800	2000	1800	2000
Beginning Stocks (1000 MT)	5081	5081	5531	5731	5976	4976
Production (1000 MT)	2700	2700	3000	3000	3000	3000
MY Imports (1000 MT)	9500	9500	9400	8000	9200	9200
TY Imports (1000 MT)	9500	9500	9400	8000	9200	9200
TY Imp. from U.S. (1000 MT)	309	309	0	0	0	0
Total Supply (1000 MT)	17281	17281	17931	16731	18176	17176
MY Exports (1000 MT)	0	0	5	5	5	5
TY Exports (1000 MT)	0	0	5	5	5	5
Feed and Residual (1000 MT)	50	50	50	50	50	50
FSI Consumption (1000 MT)	11700	11500	11900	11700	12200	11900
Total Consumption (1000 MT)	11750	11550	11950	11750	12250	11950
Ending Stocks (1000 MT)	5531	5731	5976	4976	5921	5221
Total Distribution (1000 MT)	17281	17281	17931	16731	18176	17176
Yield (MT/HA)	1.5	1.35	1.6667	1.5	1.6667	1.5

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Table 2: Barley, Production, Supply and Distribution

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Algeria	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1025	1025	1025	1025	1025	1025
Beginning Stocks (1000 MT)	436	436	261	361	411	461
Production (1000 MT)	1025	1025	1200	1200	1350	1350
MY Imports (1000 MT)	650	650	700	700	550	550
TY Imports (1000 MT)	900	900	600	600	600	600
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2111	2111	2161	2261	2311	2361
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	1350	1450	1400	1500	1450	1550
FSI Consumption (1000 MT)	500	300	350	300	530	350
Total Consumption (1000 MT)	1850	1750	1750	1800	1980	1900
Ending Stocks (1000 MT)	261	361	411	461	331	461
Total Distribution (1000 MT)	2111	2111	2161	2261	2311	2361
Yield (MT/HA)	1	1	1.1707	1.1707	1.3171	1.3171

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Attachments:

No Attachments