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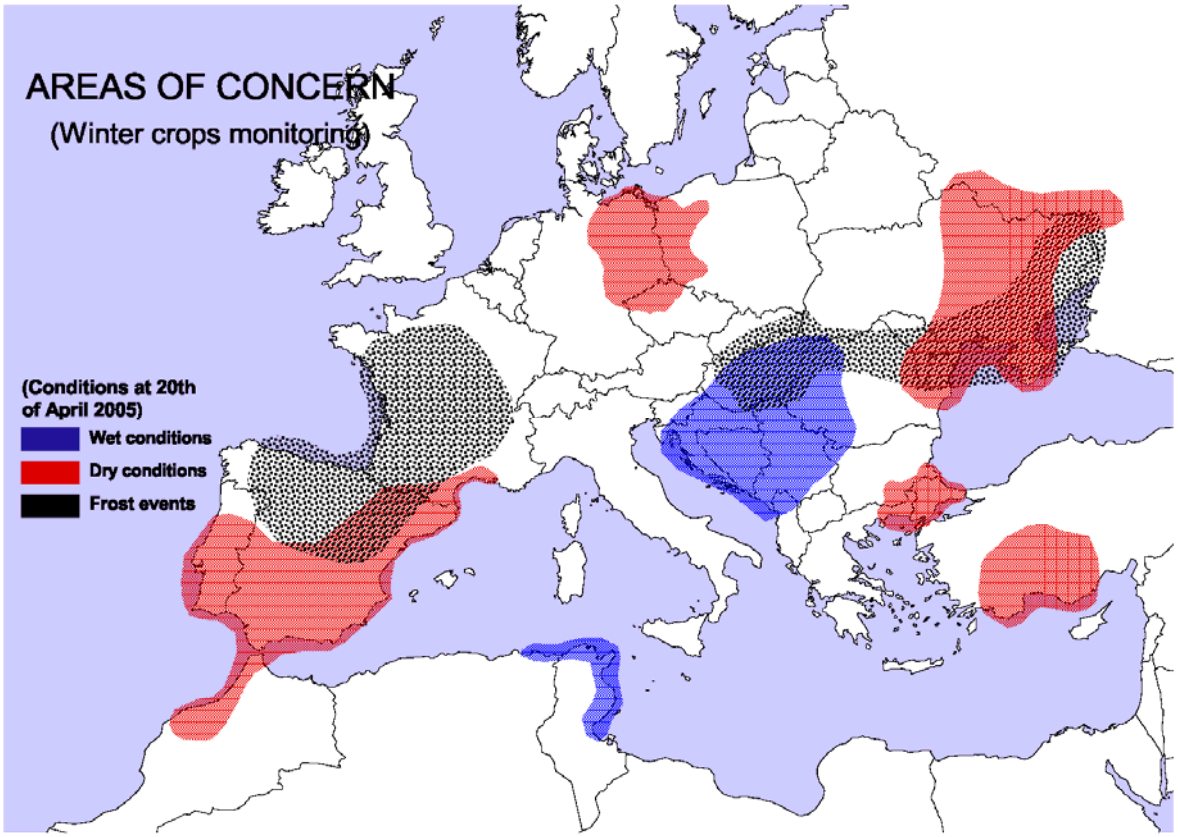
MARS Bulletin – 1st March – 20th April 2005

A GOOD POTENTIAL IN CEREAL PRODUCTION IS EXPECTED WITH THE EXCEPTION OF THE IBERIAN PENINSULA

Highlights

So far nearly favourable climatic conditions are keeping a good potential in cereals production. However, the scores expected are below last year records:

The total cereal production (excluding rice) is expected to reach more than 275 M tons (-4.4% compared to 2004 and +5.8% compared to average) where the contribution of the yield is 5.2 t/ha instead of 5.5 t/ha in 2004 (-4.2%) or 4.9 t/ha as average (+6.1%). Part of this potential is explained by the use of trends on just or to be planted spring and summer varieties (spring barley, grain maize). As regard the contribution of different crops to the aggregated EU value, the biggest variation expected is on durum wheat as a consequence of drought or unfavourably dry conditions in some producing areas in southern Europe (Spain, Portugal, part of France).



MARS STAT yield forecasts at European level: 20 APRIL 2005

CROPS	(t/ha)		EU-25		
yield (t/ha)	2004	2005	%05/04	Avg5y	%05/Avg
TOTAL CEREALS	5.5	**5.2**	***4.9***	-4.2	*6.1*
Soft wheat	6.5	**6.1**	***5.8***	-6.6	*4.0*
Durum wheat	3.0	**2.5**	***2.5***	-16.0	*0.7*
Total wheat	5.9	**5.5**	***5.3***	-6.8	*4.2*
Spring barley	4.4	**4.3**	***4.0***	-1.3	*9.2*
Winter barley	5.2	**5.1**	***4.7***	-1.8	*8.3*
Total barley	4.8	**4.7**	***4.3***	-1.6	*8.7*
Grain maize	8.2	**8.3**	***7.8***	0.6	*6.0*
Other cereals (1)	3.6	**3.4**	***3.3***	-4.1	*6.2*
Rape seed	3.3	**3.2**	***2.9***	-5.3	*9.9*

Legend:

(1) Sorghum, rye, maslin, oats, triticale, mixed grain other than maslin, millet, buckwheat.

Yield figures are rounded to 100 kg

Sources:

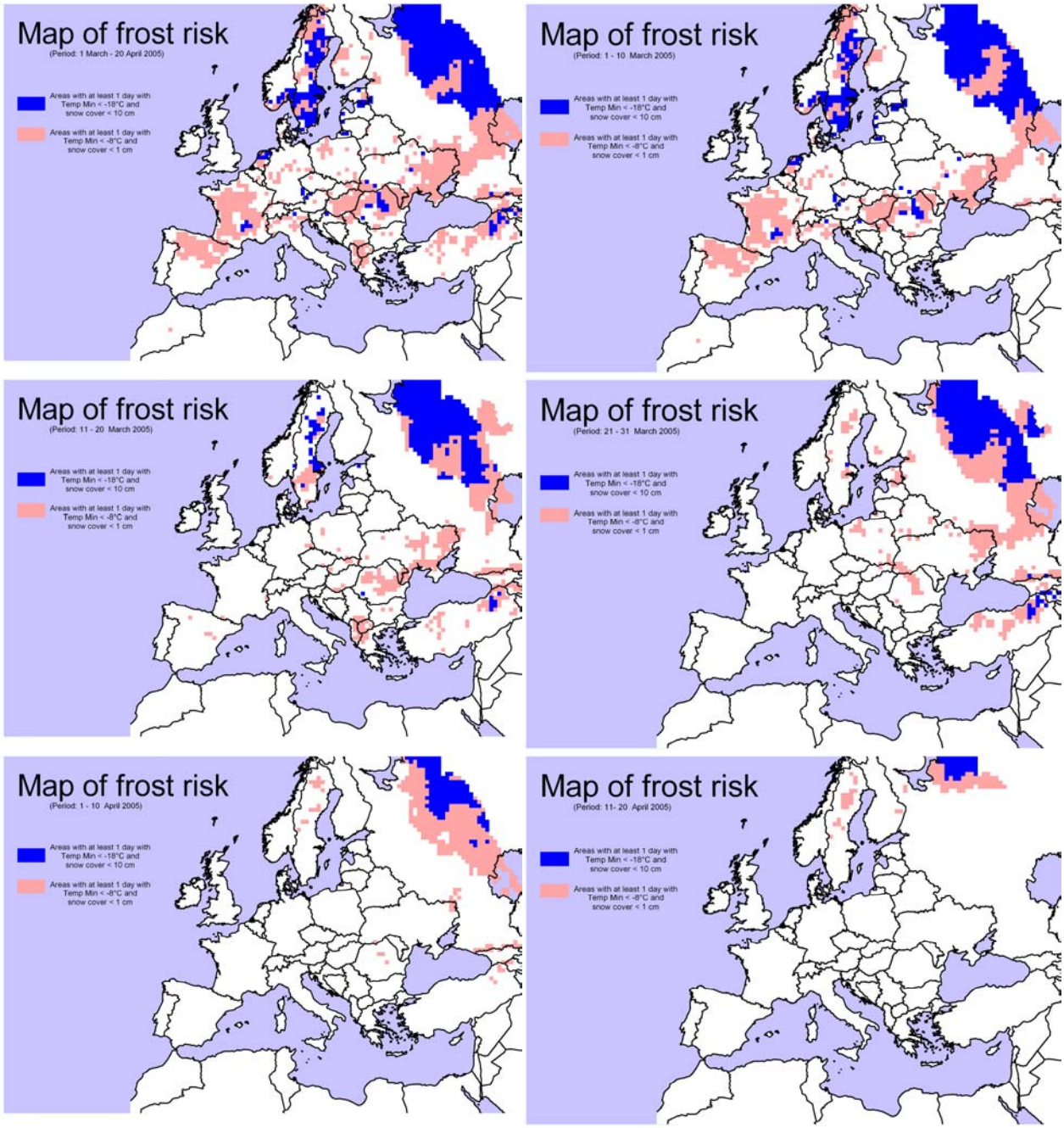
2004 yields come from EUROSTAT CRONOS

2005 yields come from MARS CROP YIELD FORECASTING SYSTEM

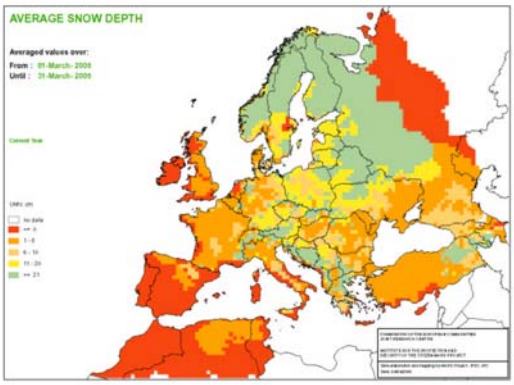
1. Agrometeorological overview *(1st March – 20th April 2005)*

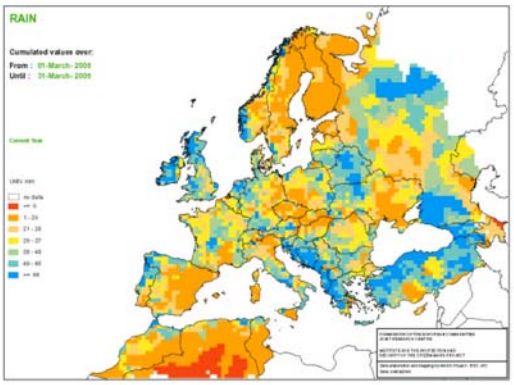
TEMPERATURES AND EVAPOTRANSPIRATION

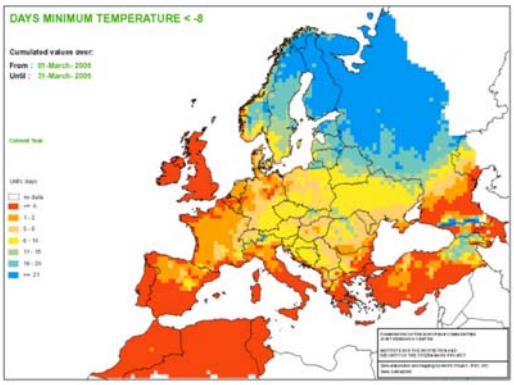
Accumulation of the active temperatures (Tbase =0°C) was in the normal range for the most of the area of interest, except northern areas where the sum of active temperatures was higher (around +15% for Ireland, UK, Benelux, Germany, Denmark, north-eastern Poland, northern Ukraine, large areas from Turkey and more than +25% for Scandinavia, Baltic States, Belarus, northern Russia, western Ukraine). Southern part of European Russia had a lower than usual accumulation of active temperatures (about +20%). In March temperatures below -15°C were recorded for the Netherlands, Scandinavian Peninsula, Baltic area, Belarus, European Russia, northern and central areas of Ukraine, southern Germany, Austria, western Balkans

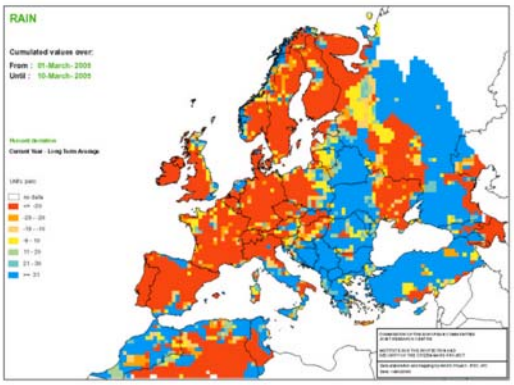


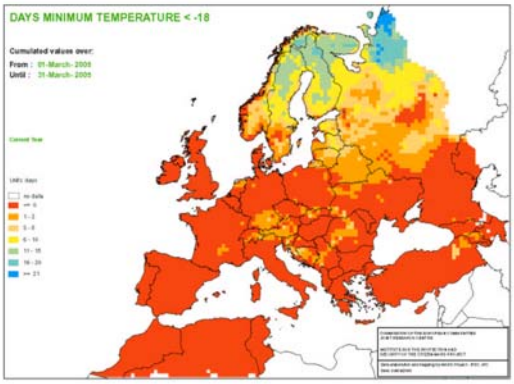
and Romania. Low temperatures (between -15 and -10 °C) occurred practically, for all area of interest except Ireland, UK and most of Mediterranean Basin.
During March, unfavourable combinations of low temperatures with poor snow cover occurred in northern Spain, France, the Netherlands, Hungary, the northern half of Romania, eastern Ukraine and north-eastern Turkey.

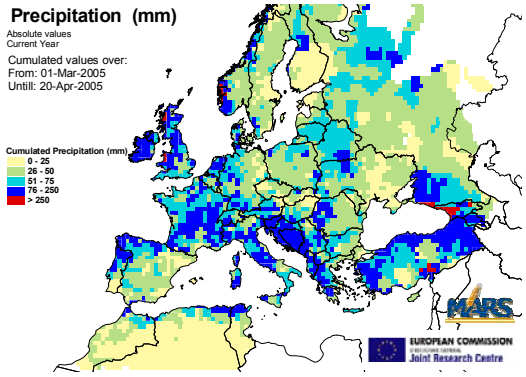


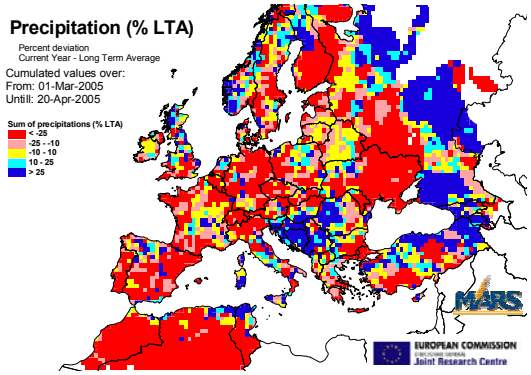






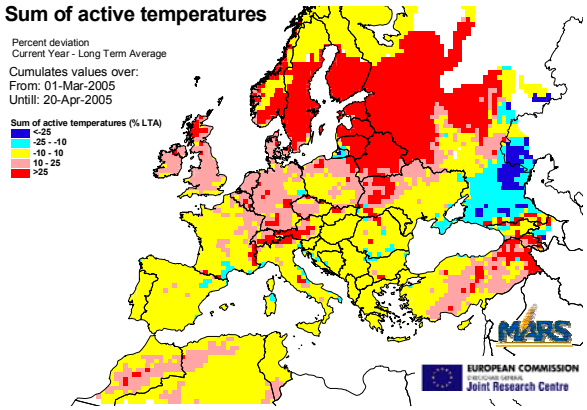


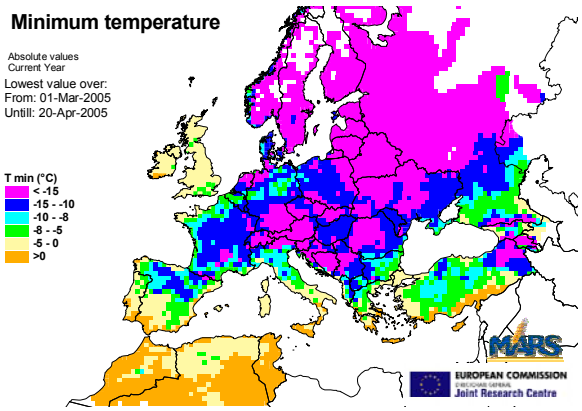


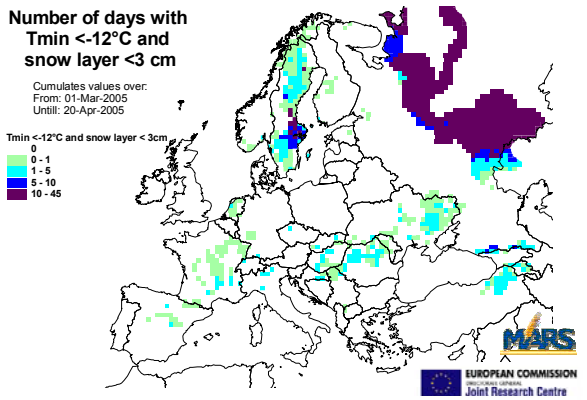


RAIN AND CLIMATIC WATER BALANCE

Generally, this period may be regarded as drier than usual (-25%) for most of Europe, except northern UK, Norway, western Balkans and the eastern Black Sea basin, where it was wetter (+25%).
The ongoing dry period from southern Iberian Peninsula continued in this period and the situation became more severe. Long dry periods were recorded also for Germany (especially in eastern parts) and Ukraine but the soil moisture is still at a sufficient level. The drought conditions from France were alleviated compared to the last decade of March. No significant impact of rain on sowing activities was estimated for this period, but for sure the emergence of the spring crops will be affected by lower than usual soil moisture. Northern Tunis benefited from some good rains but in Morocco the weather was drier than usual. Some very intense rains occurred in western Scotland and around the eastern and western rims of the Adriatic Sea..







2. Highlights by region of interest

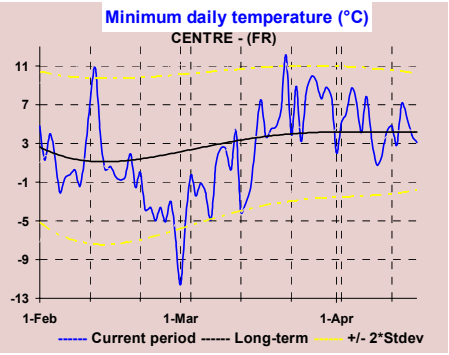
EU25

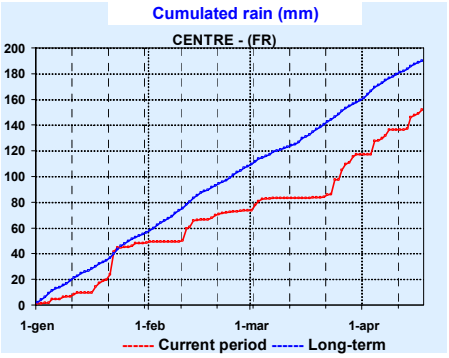
FRANCE: possible frost damages in March, significative water deficit reducing soil water reservoirs. Partial recover of top soil moisture in April.

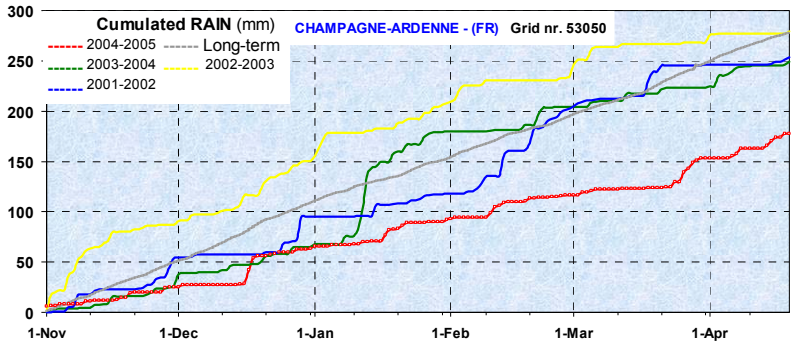
The **Soft Wheat** yield is estimated at 7.6 t/ha (-2.1% compared to 2004), **Durum Wheat** at 4.9 t/ha (-2.0% compared to 2004 but +14.3% compared to the last 5-year average), **Barley** at 7.0 t/ha, equivalent to the previous year, as well as Rape seed with 3.5 t/ha.

Following the cold period recorded in the last part of February, also during the first dekad of March the **temperatures** were lower than average, with several consecutive days with minimum values below 0°C and some extreme low temperatures recorded: -13.1°C in Bourgogne, -12.8°C in Centre, -10.4°C in Auvergne, -10.3°C in Provence. Because of insufficient snow cover, crop damages were likely.
In the remaining part of March the temperatures progressively climbed, even passing the seasonal values as in the last dekad. In April more normal conditions were recorded. In fact, the cumulated active temperatures at the end of the period presents normal values in the majority of the territory, only in the southern areas a slight deficit is observed (50/60° GDD).

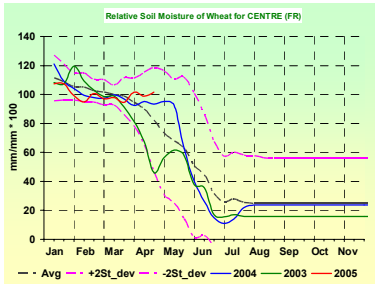
In March the **rainfall** was scarce over the majority of the territory and the soil water content was in general below the seasonal values. In the last dekad of March and then still in April significant rain was recorded. Those water supplies balanced the previous deficit. However, the analyses of the cumulated values from the beginning of the year show a slow but progressive reduction of the **soil water reservoirs** (the lowest in the last 4 campaigns, with the only exception in the Rhones-Alpes area). As a whole, during the considered period, the cumulated rains present higher values in the central part of the Country (more than 100 mm in Rhone valley, Auvergne, Bourgogne, France-Comte, Aquitaine); slightly below the seasonal values in Normandy (-20/-30% compared to long term), Eastern and Southern areas (-40/-50% in Champagne-Ardenne, Languedoc-Roussillon). In April the rains were concentrated in a relatively few rainy days, permitting an appropriate access for the spring crop sowing, particularly for Maize.

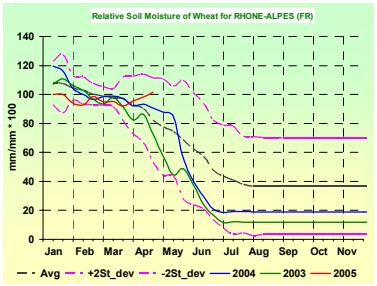


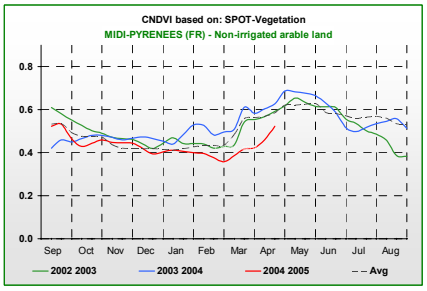


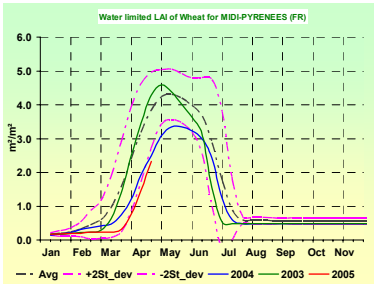


Wheat: In March, the development of winter wheat was influenced by the thermal conditions and presented a delayed stage (*tilling - stems elongation*), but in April completely recovered (*beginning of heading*) thanks to more favourable conditions. All of the southern areas (durum wheat), at the end of the first dekad of April showed a development stage slightly delayed compared to the average. Despite the relatively scarce water supplies in March, according to simulations the **soft wheat** did not suffer from water stress and the soil moisture benefited from the April rainfalls. The **Durum wheat** districts presented a worst situation: frost events and dry conditions could affect the crop canopy, determining reduction of active leaves.

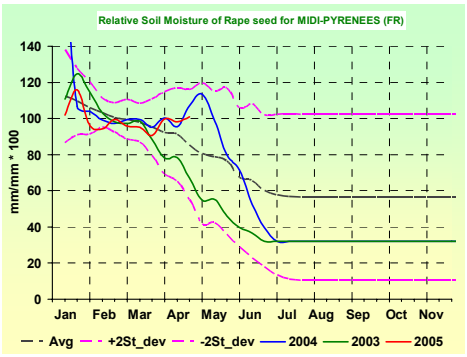


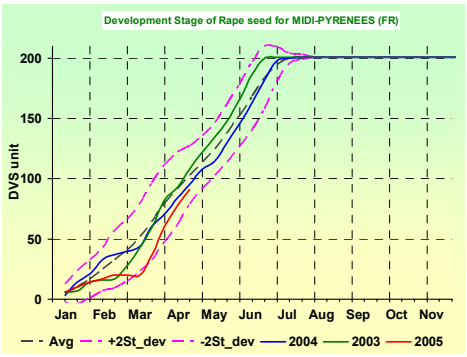






Rape seed: It reached the flowering stage in the whole country and is in advance in the north-western areas. As for winter wheat the simulated soil moisture available to the plant is not showing a water stress.



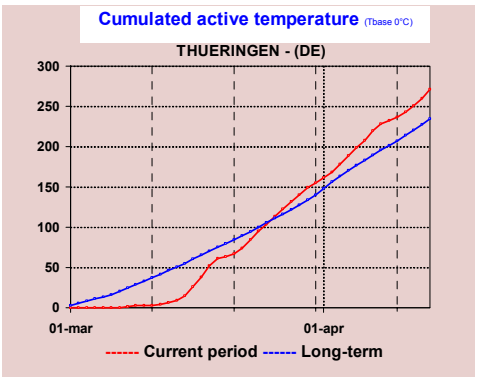


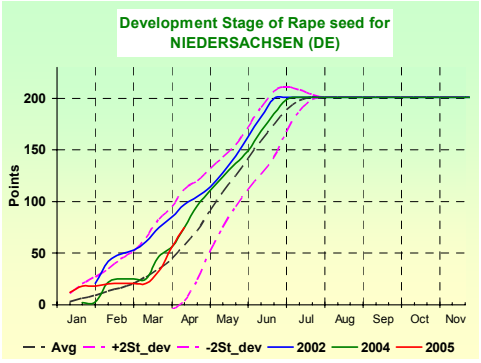
Spring barley: The unseasonable cold conditions recorded between February and March were not favourable for the late sowing (normally scheduled at the beginning of March).
Spring wheat: Similar to spring barley, the unfavourable thermal conditions prevented the canonical sowing calendar, obliging postponement to the second half of March, when close to optimal conditions were present.
Sunflower: The sowing could be made under normal conditions. The first part of the crop cycle could benefit from appropriate soil moisture for most of the country.
Sugar beet and Maize: The conditions were optimal or sub-optimal for the field work. Early to normal sowing could have been achieved as from calendar.
Potato: The potato should have also benefited from normal conditions for sowing and the crop growth should continue under optimum conditions.

GERMANY: optimal conditions for spring sowings

Although 2004 yielded higher values, satisfactory yield forecasts are set: 7.6 t/ha for soft wheat (+3.0% as compared to the last five years' average); 3.7 t/ha for rape seed (+9.2%); 5.1 t/ha for spring barley (+5.0%); 7.3 t/ha for winter barley (+14%); 9.2 t/ha for grain maize (+5.0%). The increase in soft wheat, rape seed and maize areas leads to even better forecasts for production (almost 24 millions tons for wheat, 5 for rape seed and more than 4 for maize).

In the last 30 days after a cold beginning of March, above average temperatures were recorded especially in the southern and central regions. This is leading to satisfactory vegetation index all over the country. Although the temperatures were significantly lower than the average, the presence of a snow layer protected the crops against frost during the first decade of March. During the same period below average rainfalls were recorded on the whole area with the exception of south-western areas (Baden-Wuerttemberg). At the end of March and in the first days of April dry conditions were experienced in the north-eastern regions (Mecklenburg-Vorpommern, Brandenburg, Sachsen).





Winter wheat: according to current simulations the crop is starting the stem elongation phase in South-western regions, from Nordrhein-Westfalen to Baden-Wuerttemberg; and is at mid-end tillering in Mecklenburg-Vorpommern.
Although there has been limited rainfall, soil moisture appears normal or slightly high in the South-western regions.

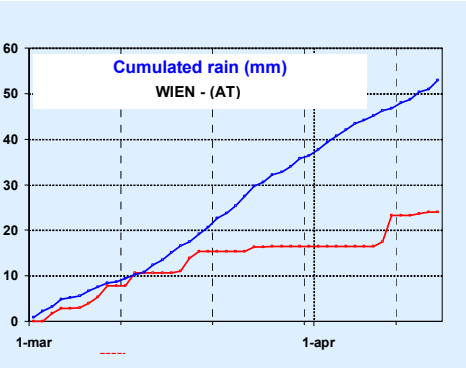
Rapeseed is entering the bud stage all over the eastern part of the country (from Niedersachsen to Baden-Wuerttemberg) with a 10 days advance on the norm; slightly in advance in the other regions, where the crop is in the second part of the elongation phase.
Soil moisture is average except in the northern zones (where conditions are just below the average).

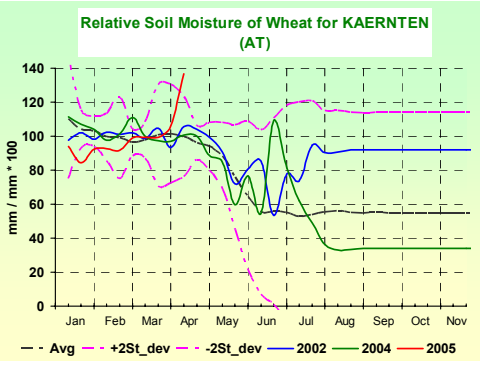
Spring crops: optimal sowing conditions for spring barley, contrary to what has been verified for winter barley. Except for the south-western regions, where the spring barley has started the tillering phase with about one decade advance on long term average, in the other regions it is regularly completing the emergence phase. Although there has been rare rainfall during the last month, no water problems are expected: the wet winter is assuring a sufficient water supply.

AUSTRIA: a dry north-east and a warm April

Soft wheat situation is very similar to the one described for Germany: forecasted yield is 5.4 (+8.0% on the last five years' average). Rape seed yield is forecasted at (2.8 t/ha), 10% higher than the last 5 years' average. Although the 2004 records are still far, spring barley yield is showing a good potential: 4.5 t/ha (a 10% increase with respect to the last 5 years). 5.2 t/ha winter barley forecasts (+3%). 9.4 t/ha is the forecasted yield for grain maize (+3% on the last years average).

The country was particularly dry during the last decade of March and at the beginning of April, especially in the north eastern regions (nearly 40% below the norm), where almost all the arable lands are located. Below average temperatures were recorded before mid-March; generally higher than average afterwards. Anyway, no frost risk has threatened the crops which are now benefiting from recent mild conditions.





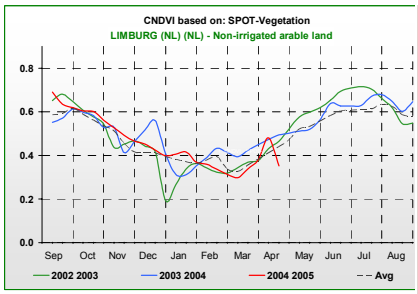
Winter wheat: wheat is completing the tillering phase and the favourable temperatures of the last decade of March and the first of April are allowing it to completely recover the considerable development delay experienced in mid-March. Although a lack of rain was recorded in the last 40 days, winter reserves allow high soil water content. In the south-western areas soil saturation is depicted as a consequence of the recent wet period.

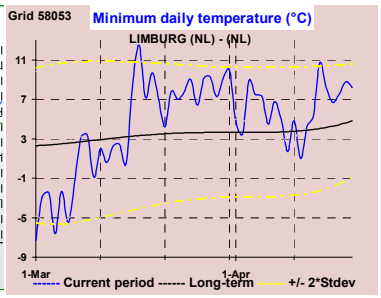
Rape seed development is following a trend similar to the one described for winter wheat and is at mid elongation stage; the last warm decades are leading to an early development. Just above the average soil moisture.
The situation for spring crops is average as sown under nearly optimal conditions.

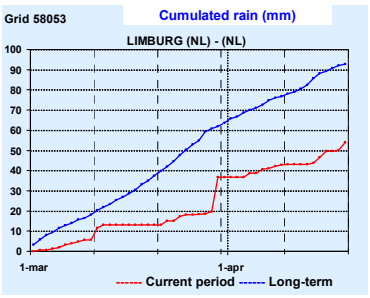
BELGIUM, THE NETHERLANDS, LUXEMBOURG: Frost events at the beginning of March followed by milder temperatures and general dry conditions, especially in Belgium.

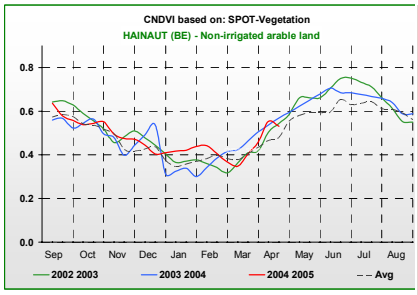
The cereal yields are forecasted at similar values to the previous campaign, respectively in **Belgium**: 8.3 t/ha (-0.6%) for Soft Wheat, 8.2 t/ha (-2.0%) for Barley; **Luxembourg** yield forecasts are: 6.0 t/ha (-5.3%) for Soft Wheat; and for **The Netherlands**: 8.4 t/ha (+1.0%) for Soft Wheat, 6.6 t/ha (-2.0%) for Barley.

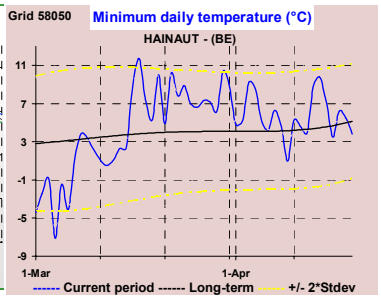
Following a colder than normal second part of February, at the beginning of March, the whole areas experienced clear skies and frost conditions and the minimum temperatures were below the normal range of variation: -12.2°C in Southern Belgium, -13.9°C in Luxembourg, -11.2°C in Noord-Brabant (The Netherlands). In general, the snow cover was thin and not always sufficient to protect adequately the active crops' canopy. Locally, light damages were likely. A drastic change happened in the second half of March with two consecutive dekads during which both minimum and maximum daily temperatures above the average were recorded: in some cases, the maximum passed the threshold of 20°C. The crops' development was boosted by the more favourable temperatures and, considering the moderate levels of evapotranspiration, the soil moisture content was maintained always within optimal levels in relation to the winter crop consumptions.
The **rainfall** was practically absent in March (only very light rains were reported). In April more rain (both as cumulated values as frequency) was recorded. However, as a whole, the cumulated rains were below the climatic values (-10/20% compared to the Long term average in The Netherlands, -30/40% in Belgium and Luxembourg).
The dry days occurred in the second part of March permitting **spring-summer crops sowing under good weather conditions**. Less favourable conditions were present in April due to the rainy events.
Moreover, in the next days the weather forecasts show beneficial significant rains.

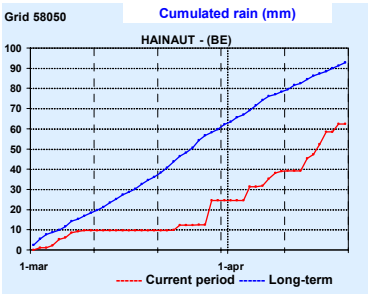


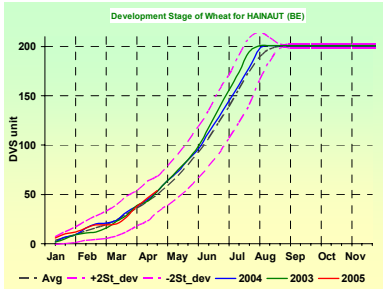


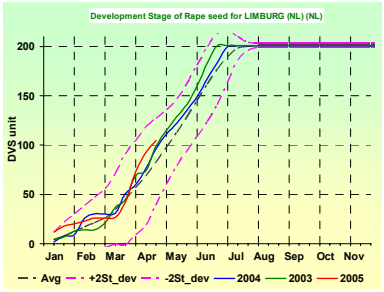








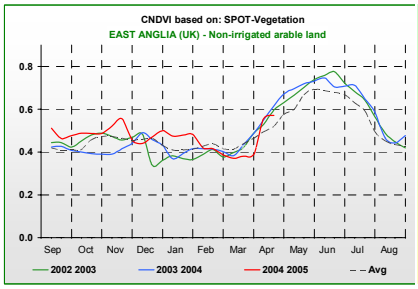


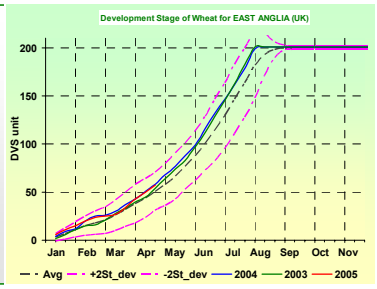


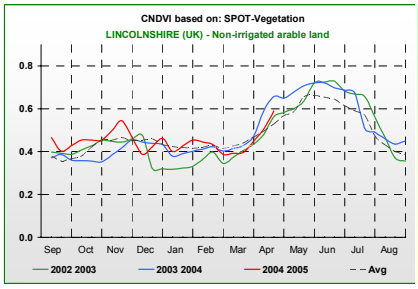
UK AND REPUBLIC OF IRELAND: general seasonal conditions

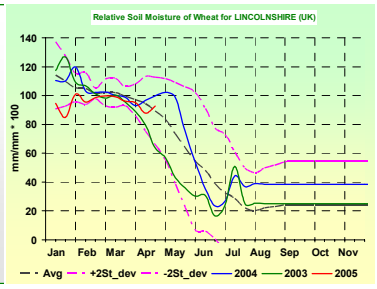
Slightly higher than normal temperatures and seasonal cumulated rains values characterized the period under consideration. As a consequence, **good potential yields are expected**, especially **in Ireland**: for wheat 9.5 t/ha (-4.1% compared to 2004, but +4.9% compared to the average of the last 5 years); **Barley** 7.7 t/ha (+7.0 %). **In UK** in expected crop yield values are: **Barley** at 6.3 t/ha (-2.0% compared to 2004); **Wheat** at 7.7 t/ha (-2.5%) and **Rape seed** at 3.0 t/ha (+5.3%).

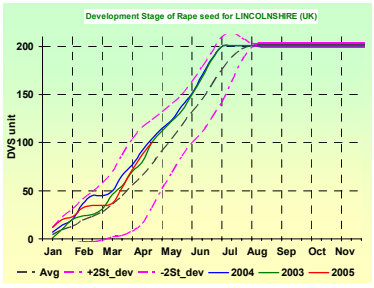
At the beginning of March, the temperatures were under the seasonal values and some frost events were recorded, for example:-4.4°C in East Anglia, -6.0°C in west Sussex, -2.9°C in Lincolnshire; however, frost damages were unlikely.
Then, during the second dekad of March the general air masses circulation changed and the temperatures climbed rapidly even above the normal. In April the temperatures were within the normal range of variation.
The analysis of the simulated crops' behaviour showed that **rape seed** rather than **wheat** positively responded to the more favourable temperatures, and in the second part of April reached the flowering stage, slightly in advance compared to the average and similar to the 2004 and 2003 campaigns.
The **rainfall** was well distributed and in general concentrated in a few significant rainy events. Although the cumulated values were slightly below the seasonal rainfalls, in general the soil moisture remained close to the average of the period.
The agrometeorological conditions reported (mild temperatures and light and not frequent rains) were also **positive for spring and summer crops** in the first stage of developments (germination, emergence) and for pastures and grasslands.







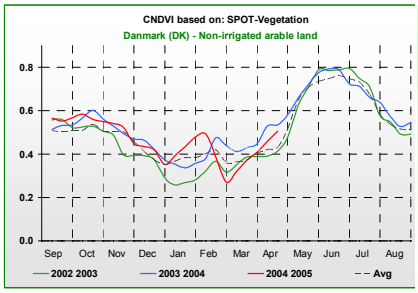


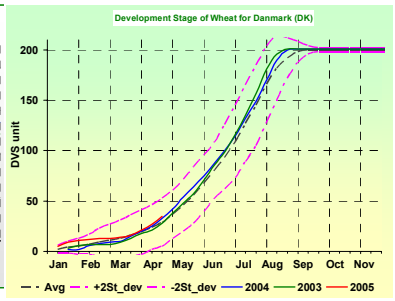


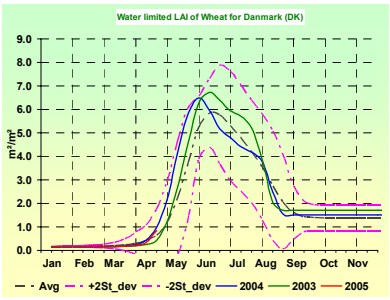
DENMARK, SWEDEN AND FINLAND: frost risk in March, normal conditions in DK; slightly higher than average temperatures and scarce rain in SE and FI.

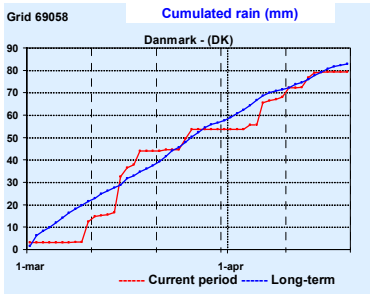
In Denmark the expected yields are now at: **soft wheat** 7.2 t/ha (+ 1.8 % compared to 2004), **Barley** 6.0 t/ha (-1.0 %) and **rape seed** 3.7 t/ha (-2.6%).
In Sweden, respectively, **soft wheat** 6.1 t/ha (+2.2% compared to 2004), **Barley** 5.4 t/ha (-4.0 %) and **rape seed** 2.7 t/ha (-2.2%).
In Finland, **soft wheat** 3.5 t/ha (comparable to 2004) and **rape seed** 1.2 t/ha (+10.9 %)

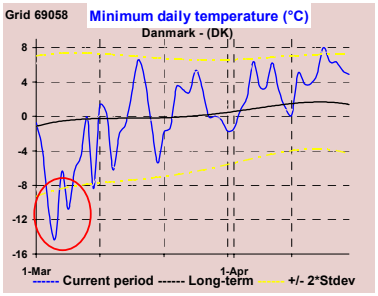
As in large areas of the European continent, March began with frost concentrated in a few days but very severe: -14.2°C in Denmark, -17.1°C in southern Finland, -20.2°C in Southern Sweden. The snow cover was inconstant and damages were possible even if slightly probable. In the second part of the month, the temperatures rapidly climbed to seasonal average and April was characterized by warmer than average temperatures.
At the end of the considered period, the cumulated active temperatures presented a significant surplus: +40°/50° GDD (equivalent to +20/25% compared to LTA) in DK, +70°/80° GDD (+70/80%) in SE and +40°/50° GDD (+120/150%) in Finland. In this country, thanks to the warmer conditions, the active temperatures (Tbase = 0°C) started to be accumulated in advance compared to the normal and the dormancy of winter cereals likely finished in advance compared to the canonical period.
The **rainfall** was quantitatively within the normal range of variation in Denmark (70-90 mm), on the contrary were scarce in Finland (10-20 mm, equivalent to 50% compared to average) and in Sweden (30-40 mm, 70% of LTA) even if locally (south-west coast) more abundant rains were recorded. However, the snow cover in March should have ensured an appropriate water supply.
The simulated crop indicators show a limited effect of temperatures on the winter cereal development, while an accelerated effect is depicted in the development of rape seed.
The spring sowing activities (usually in the first part of April) matched no limiting conditions and could be conducted without problems.

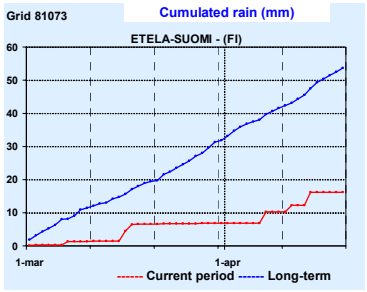


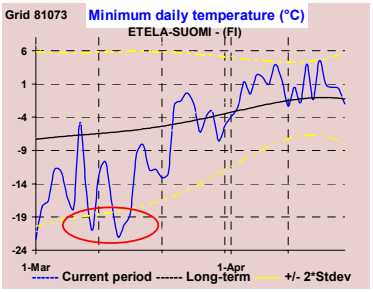


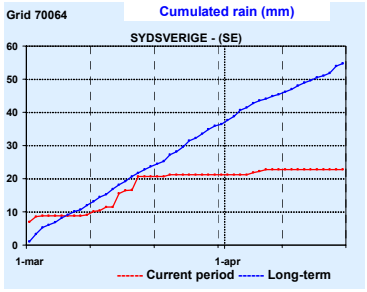


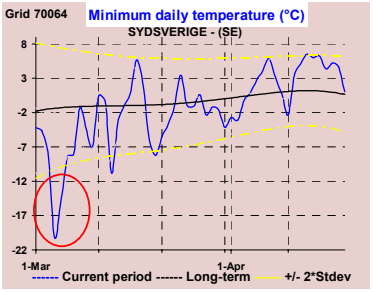


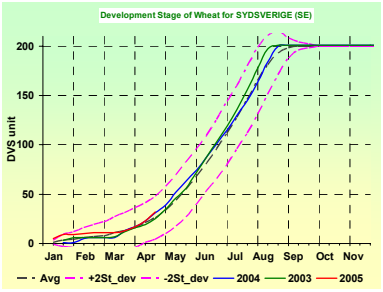








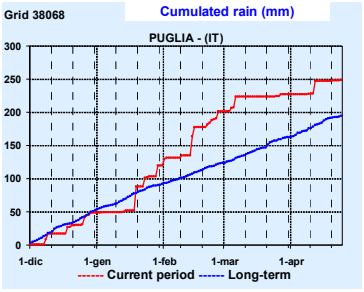


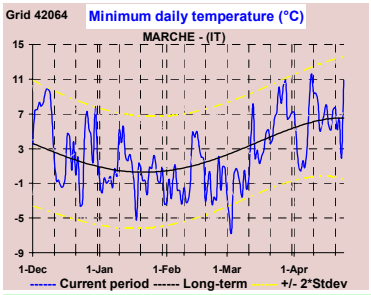


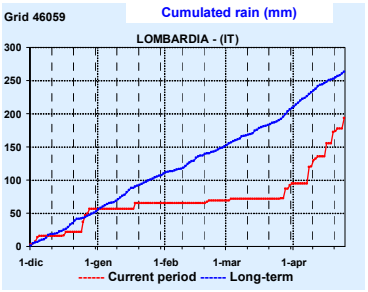
ITALY: snow and a strong drop in temperatures in March, few rains in the north and wet conditions in the centre and south. April rains eased dry conditions in the north

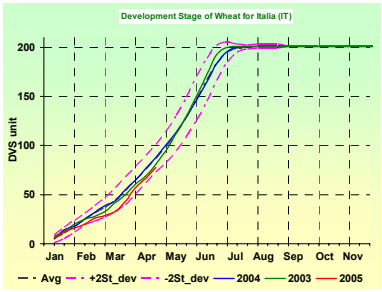
During the 2005 winter, thermal conditions were characterized by a sudden drop in March coupled to diffused snowfalls over most of the country, while rainfall experienced great variability from north to south. The development of winter crops was only partly affected by these conditions as the fall in temperatures took place before the spring development.
A favourable outcome for durum wheat is expected in southern and central Italy; expected yield is 2.9 t/ha, slightly reduced with respect to 2004 (-7.3 %) which was, in any case, an exceptional year, but increased by over 16% with respect to the 5 years' average. More uncertain is the final outcome of winter soft wheat and barley will have a strong productive concentration in the north of Italy. Here the expected yield is 5.1 t/ha, also slightly reduced with respect to 2004 (-2.5%) but increasing with respect to the 5 years' average (+ 8 %). The dry conditions in the North, following a wet start to the winter, can be considered favourable to

early sowings of the spring crops, while the opposite can be said for the central and southern regions.
In southern Italy cumulated rainfall remained on average levels up to mid February and then started to increase. There were even some cases of snow in western Sicily. In central Italy and Sardinia rainfall remained above average from December to present and there were heavy snowfalls on the mainland in February and early March.
The situation in the north was the opposite of this and the cumulated rainfall remained below average from January to April. Some recovery was observed soon after. Here too there were snowfalls from the end of December to mid March.
Minimum temperatures kept within average until early February all over the country. The situation changed around mid February and at the beginning of March, with a strong drop coupled to the snow. This was followed by a recovery which brought minimum temperatures back to normal and even to exceptionally high values in late March. Temperatures went back to the norm at the beginning of April and the maximum temperatures followed this trend.
In southern and central Italy, the development stages of winter crops were slightly delayed by the low temperatures in February and March. The increase that followed was however conducive to a boost in the development of cereals. In central Italy some cold damage was observed on winter cereals but the effects were limited by the delayed development of the crops.
The wet conditions of late March and early April in southern and central Italy can be considered as favourable to the insurgence of pests and diseases. This is not the case in the and north of the country where the rise in temperatures was coupled with fairly dry conditions.









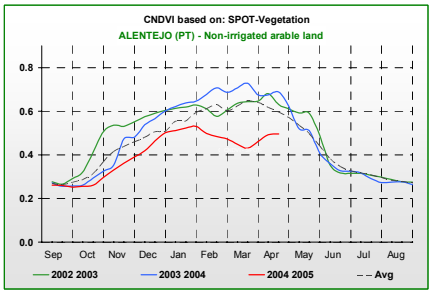
SPAIN AND PORTUGAL: Harsh frosts at the beginning of March, persistent drought in Portugal and Southern Spain compromising the durum wheat production.

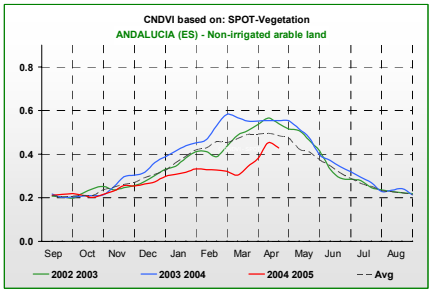
In Spain, the **Soft Wheat** yield is estimated at 2.2 t/ha (-8.3% compared to 2004), **Durum Wheat** at 1.9 t/ha (-36.6%), **Barley** at 3.2 t/ha (-5.0 %).
In Portugal, at the moment the yields are estimable for **Soft Wheat** at 0.8 t/ha (-27.2% compared to 2004)**,** 0.5 t/ha (-44.7 %) for **Durum Wheat**, and for **Barley** 0.5 t/ha (-53.0 % compared to 2004 and -64.0% compared to the last5-year average)**.**

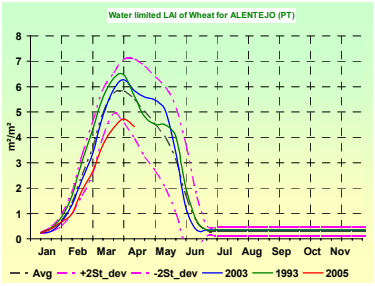
A drastic variation of the **thermal conditions** occurred in March: extremely low temperatures during the first dekad (practically between 27th February and 11th March

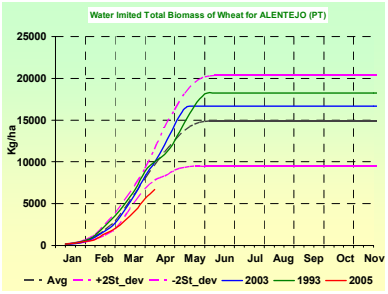
over the whole territory the lowest minimum temperatures for the last 30 years were recorded, followed by a very rapid increase even above the seasonal values. There were more seasonal temperatures in April.
In March, the minimum values recorded -13.2°C in Castilla y Leon, -13.8°C in Castilla la Mancha, -7.6°C in Andalucia, -7.8°C in Aragon, -4.2°C in Alentejo. Those conditions heavily hit the vegetative organs of the winter crops and, as a consequence, a significant reduction of the leaves was likely. From the second part of March, the more favourable conditions boosted the crops development, with a relative recovery of the crop canopy.
March was the fifth consecutive dry month. Only on the Northern coastlines of Spain and Northern Portugal a few rainy days were recorded (mainly in the last part of the month) but however with a very limited amount of water supply (50-60 mm). In all of the other areas the rains were practically absent. From the beginning of the current winter campaign the water deficit is estimable around 50-60%. In the first half of April, in the northern Peninsula, 60-70 mm of rain was recorded and 10-20 mm in the areas from Castilla y Leon to Comunidad Valenciana. At the end of April, in the Alentejo region the rain deficit exceeded 80%: from the beginning of the year only 35-40 mm of rain was recorded compared to 190 mm as cumulated average of the period. As the dry season in southern Iberian areas is approaching, the described agrometeorological conditions appears particular unfavourable in the **durum wheat** districts that probably will suffer significant reduction of the final yields.

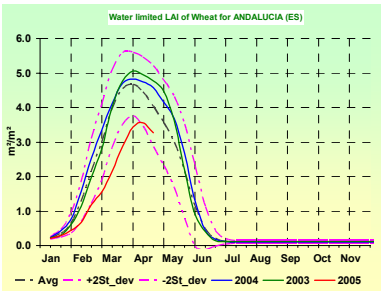
The sowing activities for **spring-summer crops** (spring barley, maize, sugar beet, etc.) matched suboptimal conditions due to the persistent drought and irrigation interventions were necessary from the beginning of the crop cycle. Unfortunately, according to the weather forecasts report, also in the next days no rain supplies are foreseen in the areas most affected by drought.

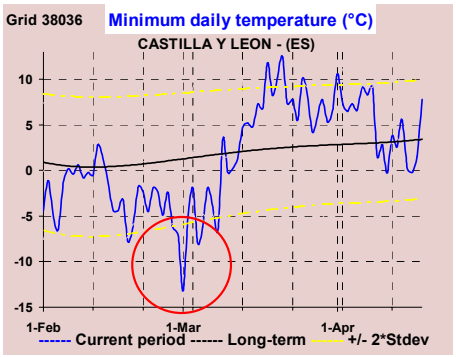


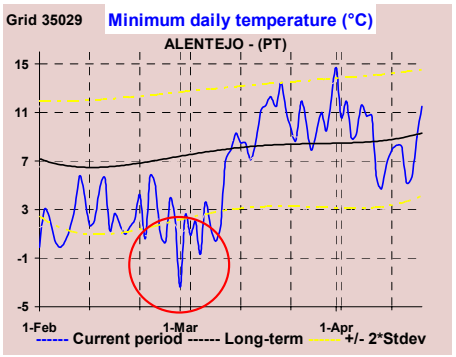


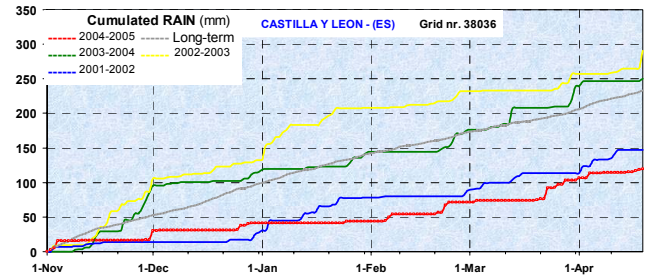


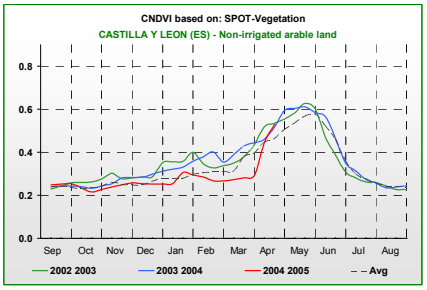


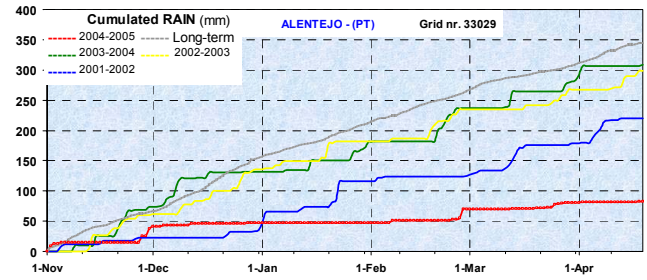


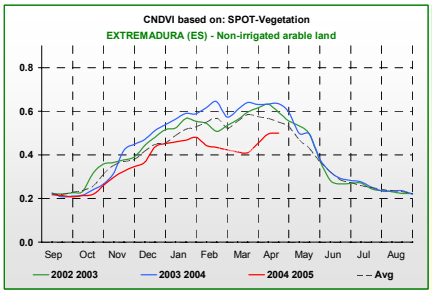


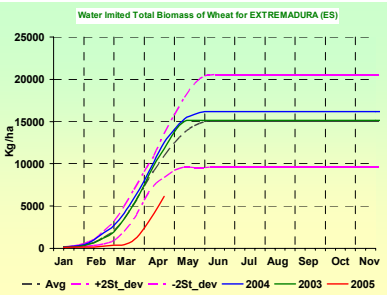


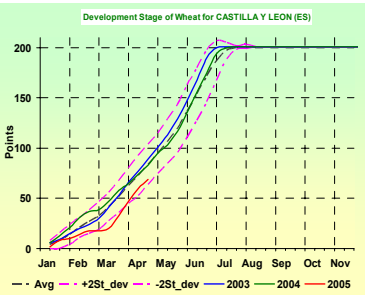










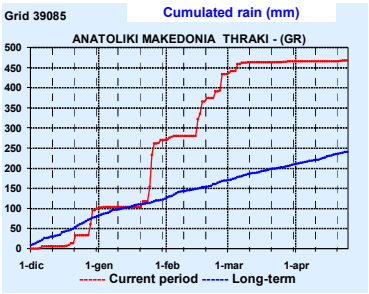


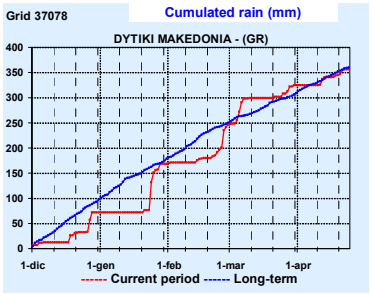
GREECE: high rainfall in the north eastern areas and a normal situation for the remainder of the winter crop production areas.

The favourable climatic conditions in the main production areas of northern Greece favourably affected the expected yield of durum wheat which reaches 2 t/ha, just 0.5 % below the 2004 levels but over 2.5 % above the 5 years average. Given the wet and warm season, attention will have to be given to the possible insurgence of pests and diseases.

The cumulated rainfall was more within the norm in the soft wheat production areas, which however experienced the cold spells of February and March. The expected yield is in this case 2.7 t/ha, with an almost 14% decrease with respect to 2004 but with a -1% to the 5 years' average.

The metrological season proceeded along the norm during the 2005 winter in most of the main agricultural areas of northern Greece (Makedonia). In the north east (Anatoliki Makedonia), close to the Bosporus, intense precipitation including snow, brought the cumulated rainfall to exceptionally high values.
While in the rest of the agricultural north, the minimum temperatures reported some low peaks in late February and late March, in correspondence with snow events, Anatoliki Makedonia skipped the March lows and started experiencing an early spring.
The situation was quite different in the central portions of Greece where the winter was rather dry and the cumulated rainfall levels kept well below average. Temperatures progressed along the norm and here too there were cold spells in mid February and mid March, associated with snowfalls. The season is proceeding towards warmer levels and given the dry winter and very little spring rains one would expect late sowing for spring crops. This may however be compensated by the large diffusion of irrigation practices in the area.

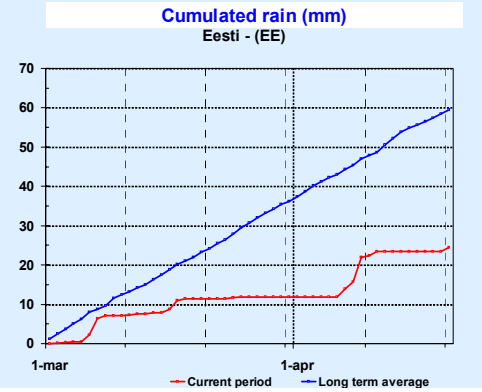




ESTONIA, LATVIA, LITHUANIA: Warmer and drier, favourable conditions for sowing of spring barley

Forecasted yields for soft wheat are 2.2 t/ha (-8% as compared to the previous year) for Estonia, 3.7 t/ha (-9%) for Latvia and 3.0 t/ha (2%) for Lithuania. For rape seed the estimations are 1.7 t/ha (+25%) in Estonia, 1.8 t/ha (-3%) for Latvia and 1.6 t/ha (-18%) for Lithuania. Barley yield in Estonia is expected at 2.0 t/ha (-11%) and for Latvia and Lithuania the figures are 2.0 t/ha (-9%) and respectively 3.0 t/ha (+4%).

For the whole Baltic area accumulation of active temperatures was higher than usual. Average snow layer in this area decreased below 2 cm after the end of March but no dangerous frost was noticed after that. The precipitation level was lower than usual (-25%) for Estonia, western parts of Latvia and Lithuania (-15%) and close to normal for the eastern areas of these countries. Rain during the sowing period of spring barley did not exceed 10 mm; generally the conditions may be regarded as favourable for this activity. Development of winter wheat is close to normal.



POLAND: Frost problems in north-western Poland

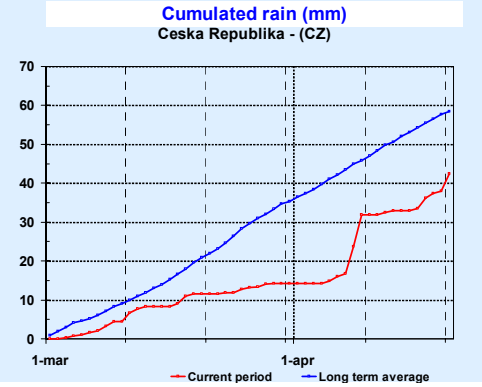
The early yield forecasts are 3.9 t/ha (9.1% as compared to the previous year) for soft wheat, 3.2 t/ha (9%) for total barley, 2.6 t/ha (8%) for sugar beet, 2.6 t/ha (-8%) for rape seed and 6.0 t/ha for grain maize (+4%).

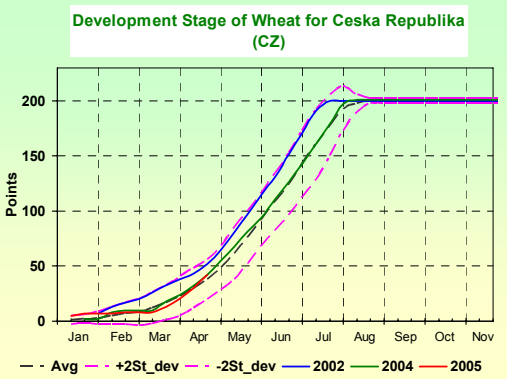
Accumulation of active temperatures was higher in northern and eastern areas of the country and close to normal for the rest of the country. Temperatures around -7°C combined with a poor snow layer (<1 cm) occurred after several days with deadening temperatures in the second decade of March in the north-western areas.
Development of winter wheat is close to normal. The sowing of sugar beet and spring barley occurred in relatively dry conditions.

CZECH REPUBLIC: Warm and dry

The yield forecast is 5.2 t/ha (-12% as compared to the previous year) for soft wheat, 4.2 t/ha (-12%) for barley and 4.2 t/ha (-16%) for rape seed, 6.2 t/ha (-2%) for grain maize.

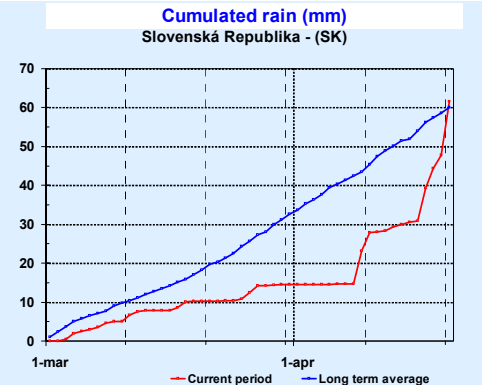
The western half of the country was warmer than long term average and the considered period was drier than usual (-25%). The development and leaf area index of the winter wheat were close to normal, for rape seed the evolution of these parameters is anticipated. The sowing decade for spring barley was relative dry (maximum rain was below 3 mm).

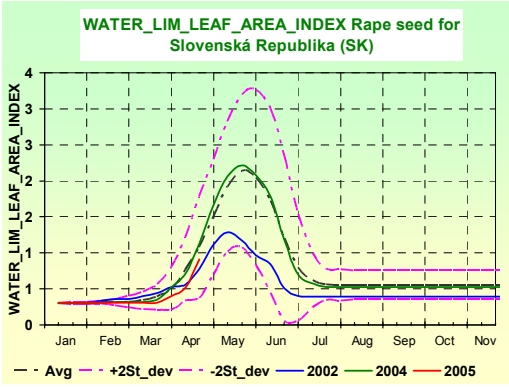




SLOVAK REPUBLIC : Dry spring

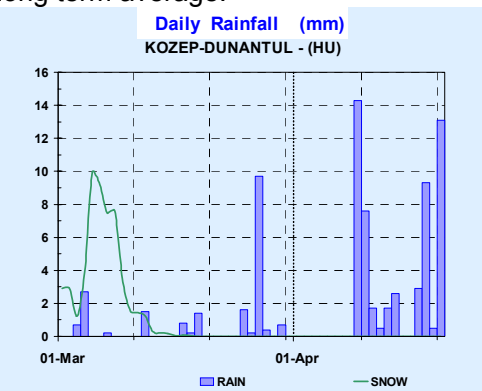
The yield forecast is 3.4 t/ha (-28% as compared to the previous year record) for soft wheat, 3.2 t/ha (-21%) for winter barley, 1.9 t/ha (-32%) for rape seed and 5.0 t/ha (-16%) for grain maize.
Thermal conditions were close to normal, excepting a small warmer area in the northern Slovakia. The cumulated precipitation remained low for most of the considered period but in the end some rains increased the value up to the long term level.
The simulated parameters for winter wheat and winter barley are close to normal, but the simulated leaf area for rape seed is below the long term average although the development stage is slightly in advance.

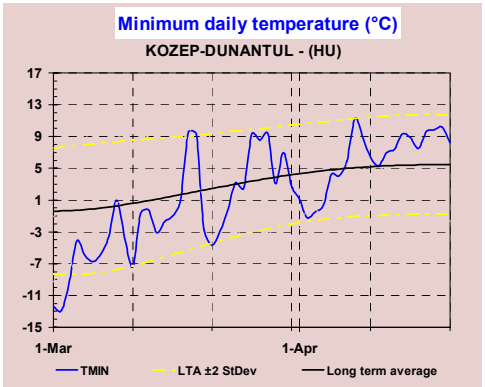




HUNGARY: Late moderate frost risks

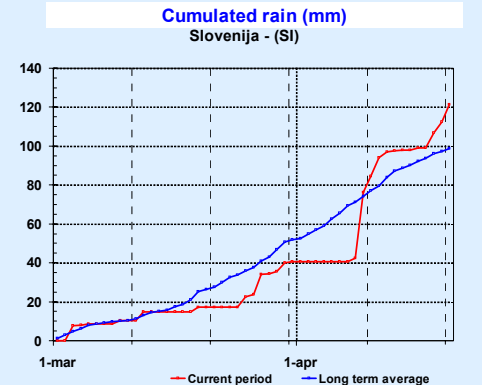
The yield forecast is 3.8 t/ha (-26% as compared to the previous year record) for soft wheat, 3.6 t/ha (-19%) for durum wheat, 1.7 t/ha (-25%) for rape seed, 3.2 t/ha (-25%) for barley and 5.9 t/ha (-10%) for grain maize.
Thermal resources available for plant development were in the normal range. The northern Hungary was drier than usual meanwhile the southern half of the country was wetter. At the end of the first decade of March, for large areas some low temperatures occurred (about -7°C and less) in a moment when the depth of the protective snow layer was around 1 cm. A situation like this may affect in this period some sensible crops like winter barley. The small delay in winter wheat development was recovered at the end of the considered period but the leaf area index is below the long term average.

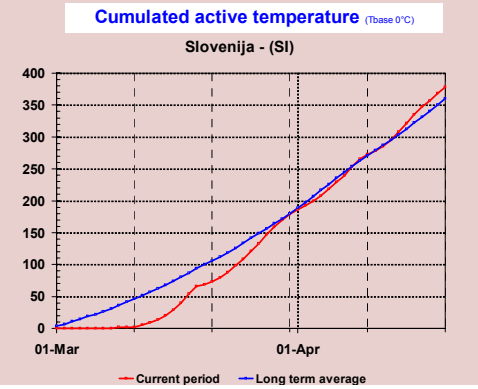




SLOVENIA: Wet, good conditions for the sugar beet

The yield forecast is 4.6 t/ha (+1% as compared to the previous year) for soft wheat, 4.0 t/ha (+1%) for barley and 7.1 t/ha (-9%) for grain maize.
From beginning of April the accumulation of active temperatures recovered the previous delay and entered in the normal range. Due to the rain received at the end of the first decade of April, the cumulated precipitation level climbed above the long term average (+20%). The decade for maize sowing was relatively rainy but in its middle there were several drier days. Sowing of sugar beet was performed under dry condition and decades after sowing were rich in precipitations. Development of winter wheat was slightly in delay but leaf area index is close to normal.

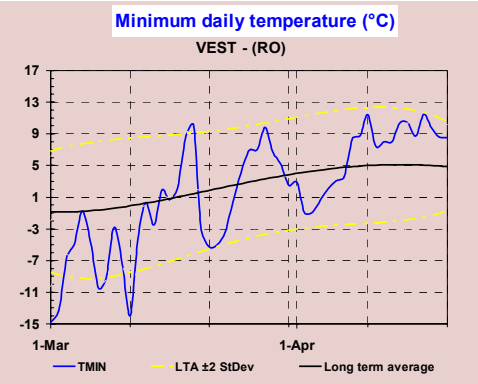


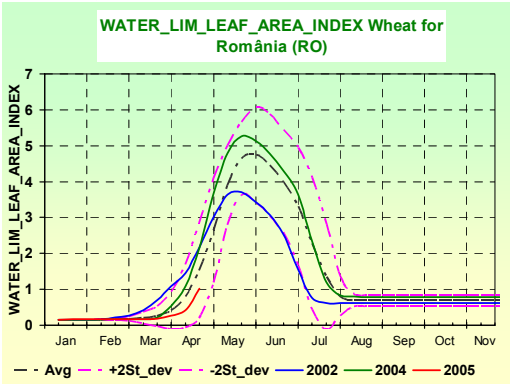


CENTRAL EUROPEAN COUNTRIES

ROMANIA: moderate frost risks in west, dry in east

Winter wheat yield is forecasted at 2.4 t/ha (-30% as compared to the previous year record) and the yield forecasting for barley is 2.4 t/ha (-38%).
For most agricultural areas the active thermal resources were at normal levels for this period, but some areas along Danube were cooler than usual (-10%). North and western Romania was wetter than usual meanwhile the eastern was drier than usual. For all areas it was possible to find dry “windows" for sowing of the spring crops. Development of winter wheat was close to normal but simulated leaf area index was below the long term average. Simulations for barley are close to normal.





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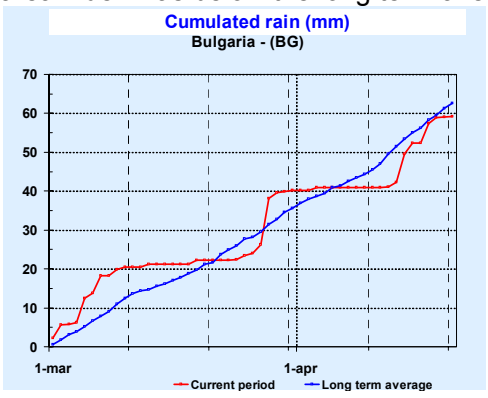
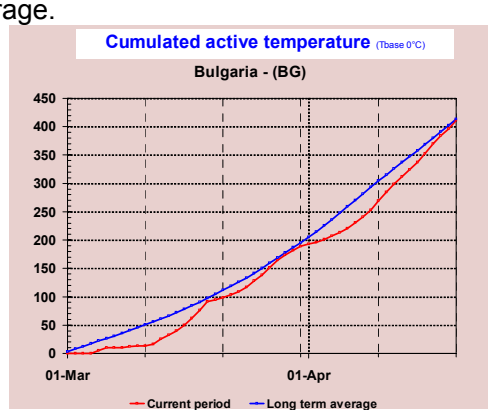
BULGARIA: Normal conditions

The yield forecast is 3.0 t/ha (-15% as compared to the previous year record) for wheat and 3.0 t/ha (-17%) for barley.
Accumulation of active temperatures was in the normal range. The precipitation regime was wetter in west (+20%), close to normal near the northern border and drier than long term average for the rest of the country, but globally, for all agricultural areas the cumulated precipitation at the end of considered period was close to normal. Simulated development stage of winter wheat was close to normal but simulated leaf area index was below the long term average.





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TURKEY: Drought in most of the country, worsening in the centre and south but recovering in the northern and western areas.

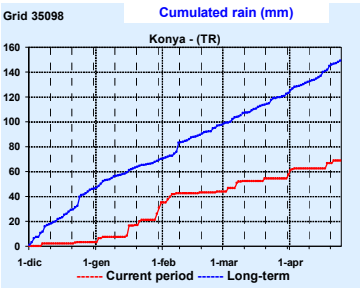
The winter 2005 climate in Turkey was characterized by a diffuse drought in the central and south-eastern portions of the country. This situation grew increasingly worse heading into spring.

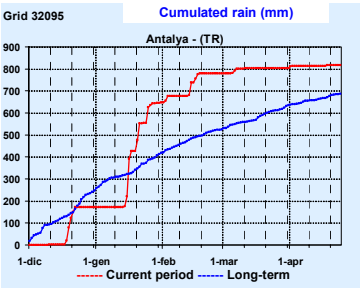
The minimum and maximum temperatures in these areas showed strong variations at the end of winter, with low peaks in late February and absolute highs in early March. This oscillation continues up to the present, in coincidence with snow.

In the major winter wheat and barley production areas of the country the cold inland climate had a delaying effect on the development calendar. Consequently it is still too early to express a conclusive judgement on the productive outcome, which however does not appear to be promising.

The Black Sea areas however, saw a recovery from drought in late January and from that point on, the cumulated rainfall exceeded the average and kept a sufficient water supply until the beginning of April. These favourable conditions were supported by minimum temperatures within average and a sufficient level of GDD (base 10 0C). Though not main producing areas, yields are expected to be favourable here.

The western and south-western areas (along the Mediterranean) saw a recovery from drought, however delayed to late March and April, supported in this by diffuse snowfalls..





EASTERN COUNTRIES

BELARUS: Warm spring

Accumulation of active temperatures was higher than usual (>+25%) and the precipitation regime was normal, excepting the eastern part of the country where a wetter areas was bordered by a drier area. For the considered period no significant frost event was detected. Development stages of wheat and barley are close to the long term average.

UKRAINE: Drier than usual

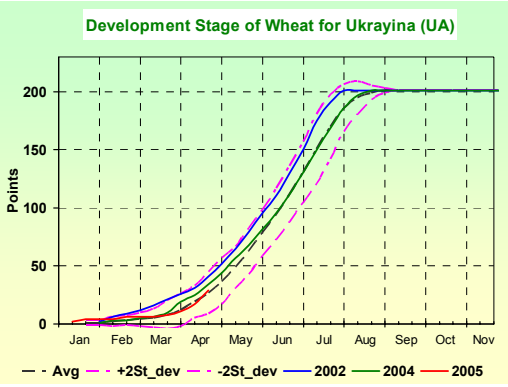
The yield forecast is 2.7 t/ha (-27% as compared to the previous year record) for wheat and 2.1 t/ha (-15%) for barley.

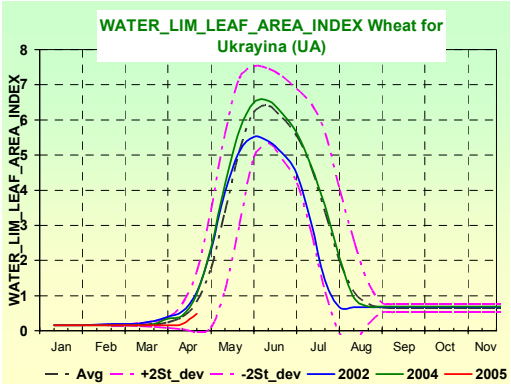
Accumulation of active temperatures was lower than long term average in Crimea (-20%) meanwhile in the north and the western Ukraine the conditions were warmer than usual (+25%).

The frost (minimum temperature below -12°C) and the snow layer thinner than 3 cm from eastern Ukraine affected the winter crops from that area, but these winter events are usual for the considered area.

The largest part of the Ukraine was drier than usual (-25%), except the north-west part of the country where the conditions were close to normal. It is considered that the soil moisture replenished by the snow melting is still sufficient and the precipitation regime of May will be crucial both for winter and spring crops.

Simulated development of winter wheat is close to normal conditions but leaf area index is below normal. A general rough estimation is that a normal yield level is still possible but the chances for an exceptional good year for winter crops are decreasing with each decade.





RUSSIA: normal conditions for winter crops and delay in sowing of spring crops

The period under analysis is the period of the start of winter crop growth after the winter, and time for early spring crop sowing.

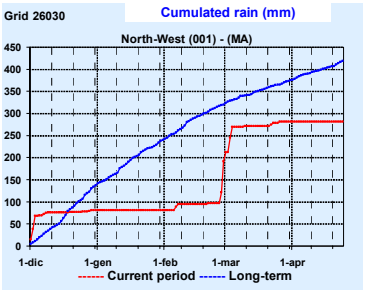
March 2005 was colder than normal. The air minimal temperature in the northern part of the European Russia some days was lower than -15°C, and in the southern part was near -5/-10°C. But the winter crops were protected from frost by the snow cover. The snow cover had disappeared in the Southern regions of Russia in the middle of March, in the Central Chernozemic region – at the beginning of April. In near Volga and Urals regions snow cover still remained on the ground the middle of April.
Amount of precipitation was higher during March by more than 30% than in the previous year and more than normal practically everywhere. Only in the Central Chernozemic and North-Western regions the amount of precipitation was lower than normal. The main part of precipitation was in the form of snow.
Such cool and wet weather was not dangerous for winter crops. But due to abnormal winter conditions winter crops are likely to be weak after snow melting. Remote sensing indicators show that the winter crop status after snow cover melting was worse than in the previous year in Southern regions of Russia. But, the situation with winter crops can be easily improved by early nurturing of them by fertilizers. The analysis of the weather conditions during the winter shows that in the current season the frost damage of winter crops was at low level practically in all regions of Russia.
Low air temperatures and large amounts of precipitation in the southern regions of Russia, and long snow cover duration in the Central regions should lead to delays in early spring crop sowing. Improvement of the weather at the beginning of April demonstrates that the delay should be not more than 2 weeks. But such a delay can slightly affect the spring crop acreage in the current season.

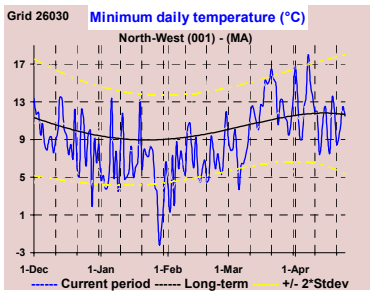
MAGHREB: favourable conditions in Tunisia and Algeria and ensuing drought on the Atlantic coast of morocco.

Morocco

The 2005 season in Morocco is showing a diffused and persistent drought which strongly affects the winter crops' production areas (essentially wheat) in the north-west and the Atlas Mountains. A low yield is to be expected.

The low temperatures of late January were in coincidence with the early stages of development and should not have damaged the crops. Minimum temperatures saw a rise in late March and early April, but this may be able to further worsen the situation, considering the deficit in water supply.

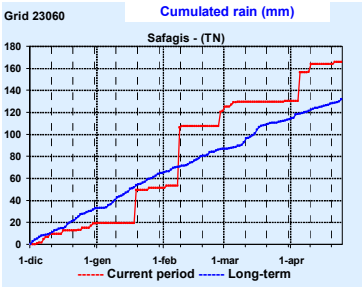




Tunisia

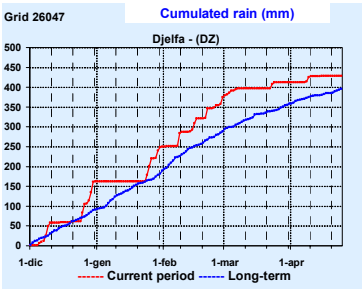
The climate in the winter crop production areas of Tunisia was favourable throughout the development season. In the interior regions of the north and on the Mediterranean coast, the cumulated rainfall, after a shortage at the start of the season, recovered around mid February. Minimum temperatures kept within an average fluctuation

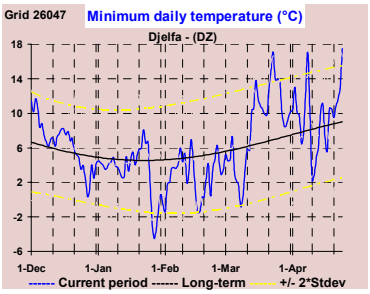
with some absolute high peaks in late January and early April. These conditions should boost the productive outcome of winter wheat.



Algeria

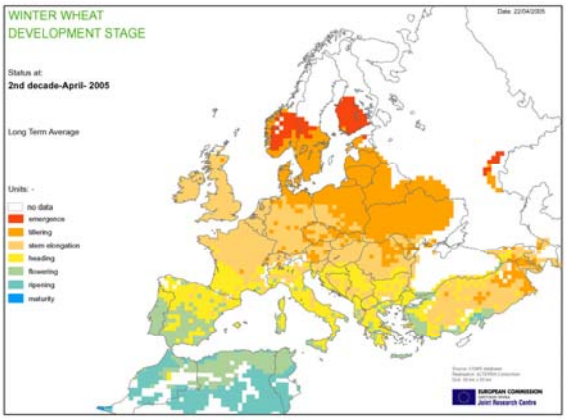
2005 winter climatic conditions in Algeria can be considered favourable to winter crops in the production areas on the coast. Cumulated rainfall was above average along the development period. Minimum temperatures saw some low peaks in early February and a rise in March that, given the water supply, can be considered as conducive to a good crop.

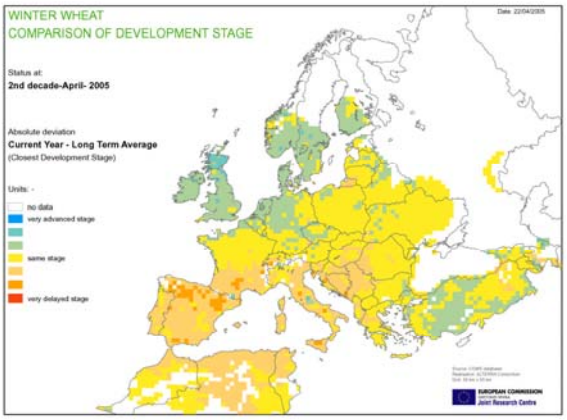


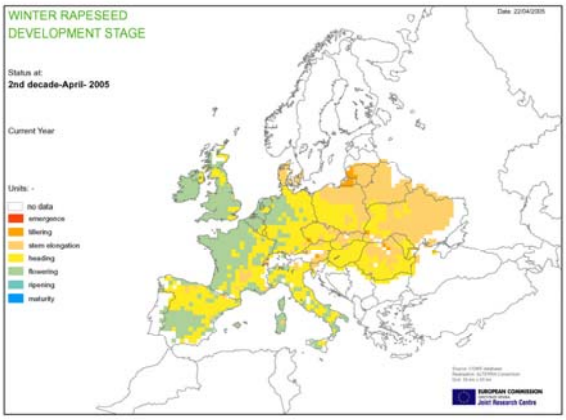


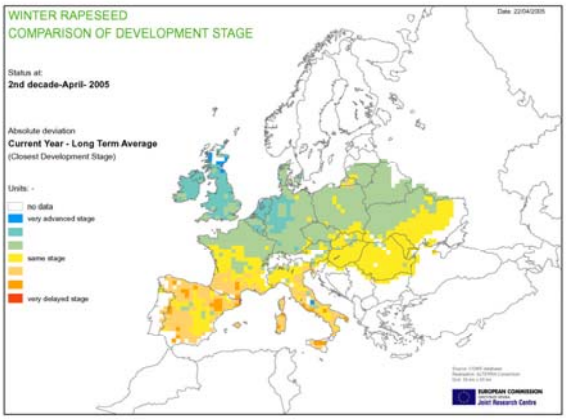
2. MAPS

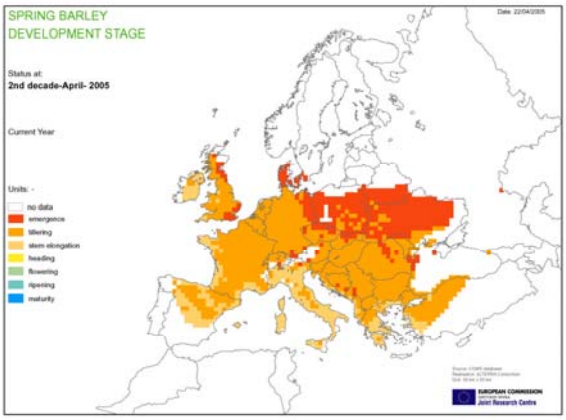
CROP MAPS

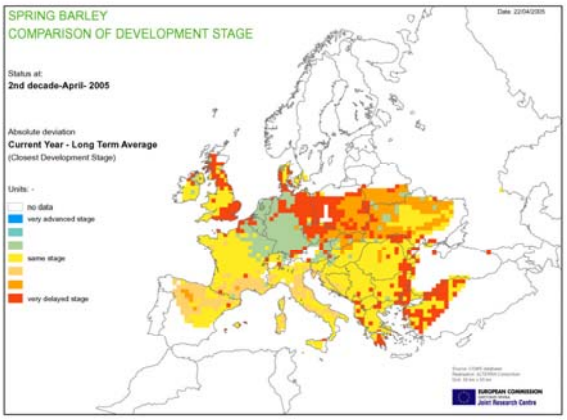




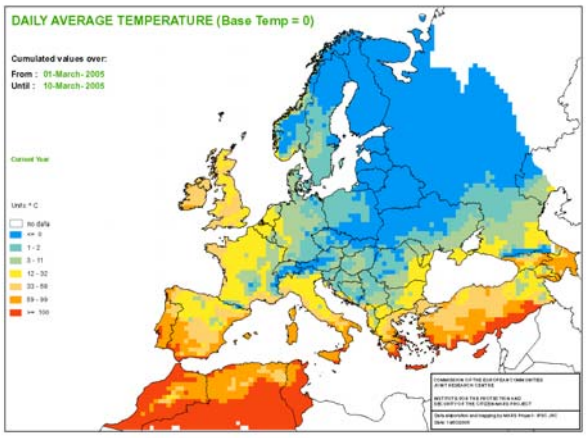


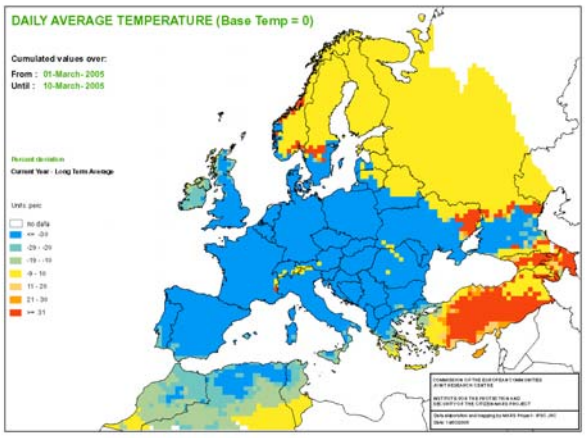


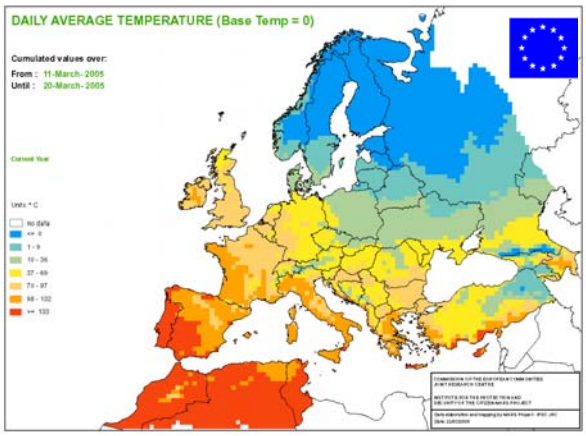


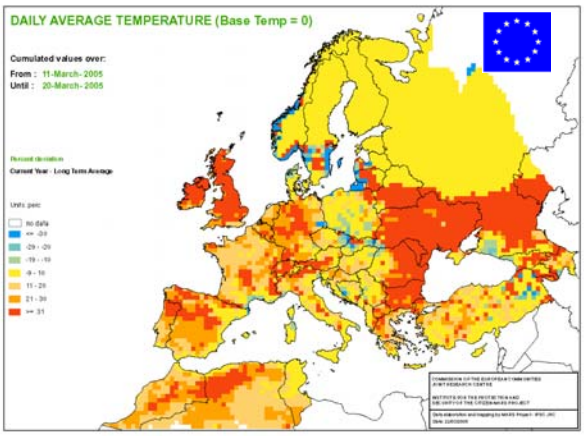


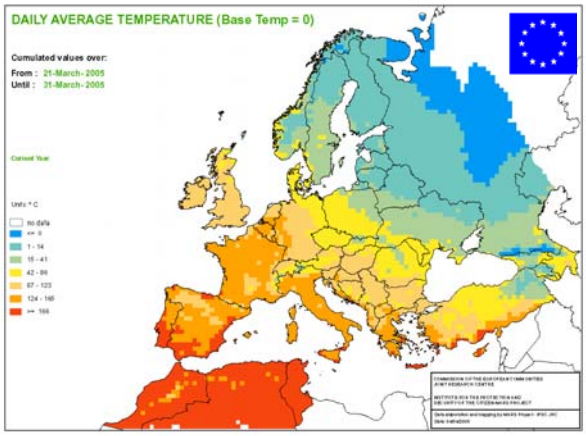
TEMPERATURE MAP

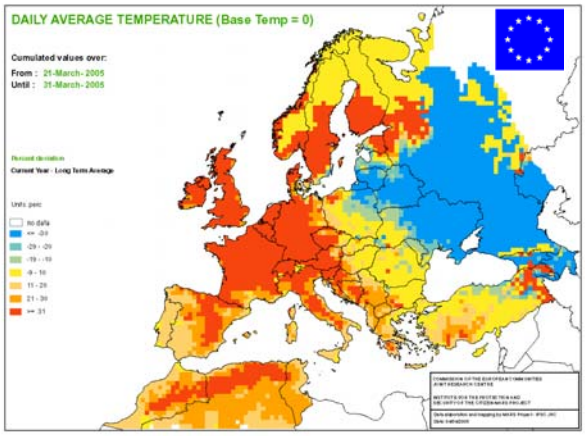




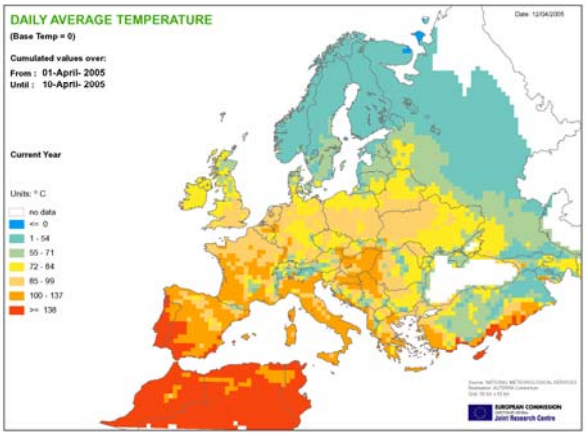


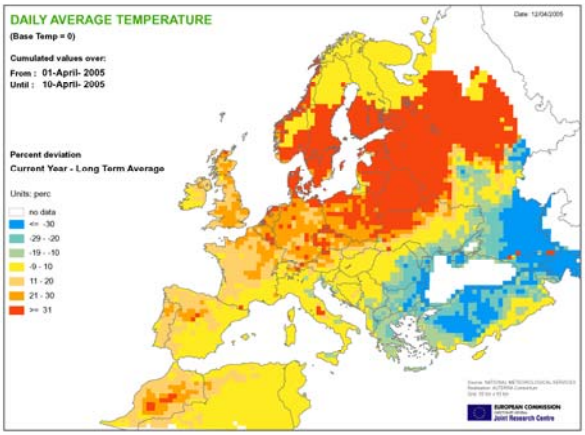


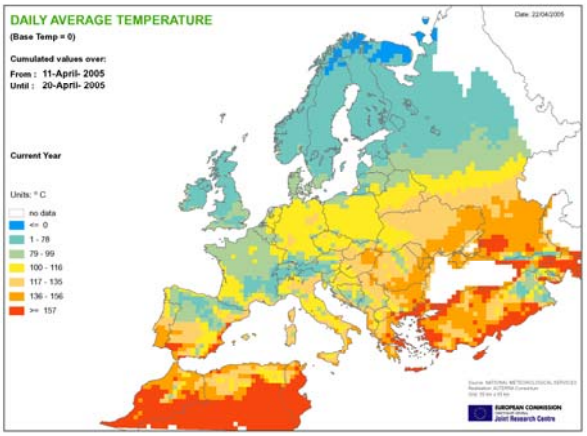


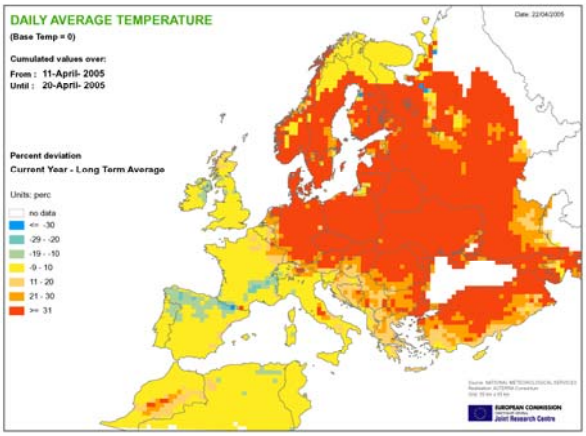


TEMPERATURE MAP

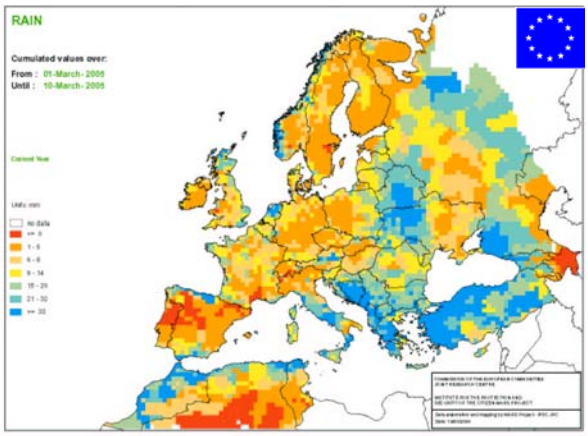








RAINFALL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Until : 10-March-2005
Current Year
Units: mm
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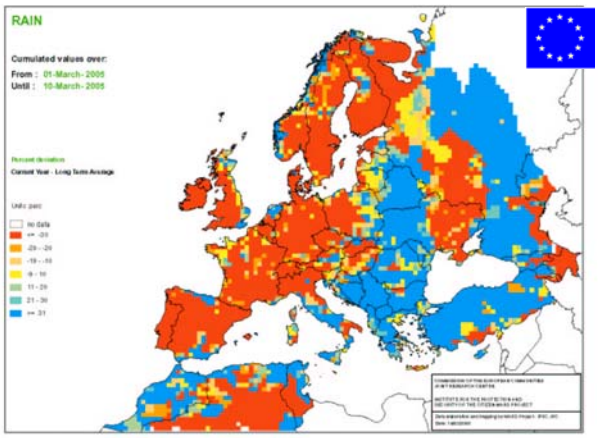
6 - 8
9 - 14
15 - 20
21 - 30
>= 30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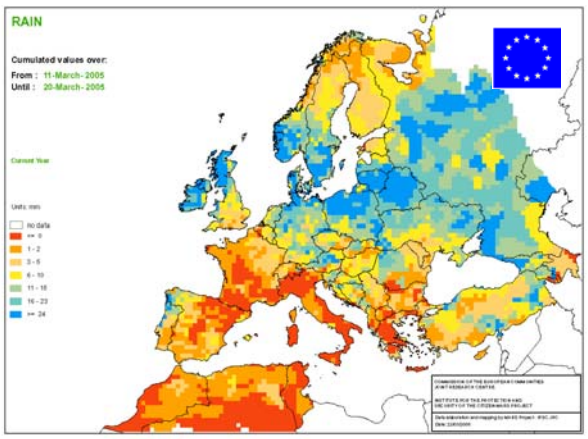
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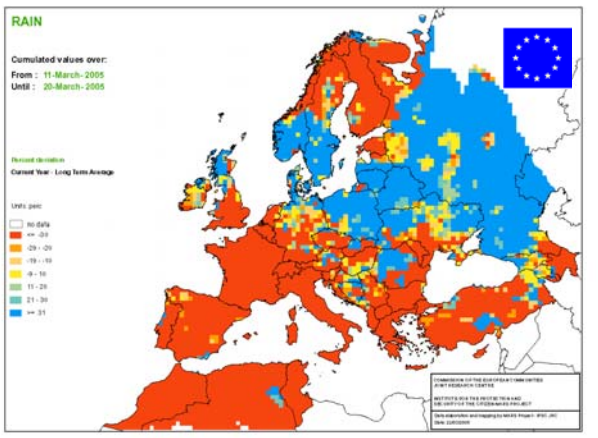
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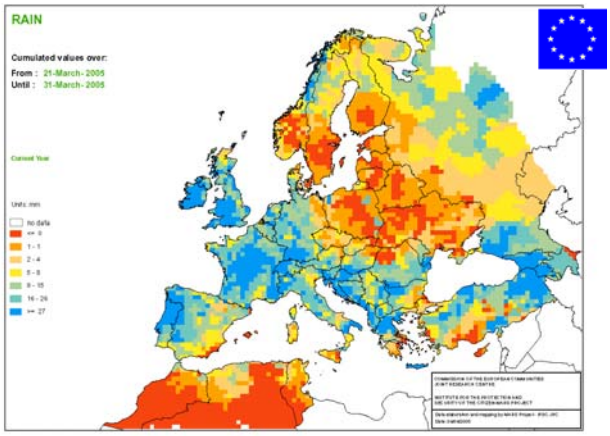
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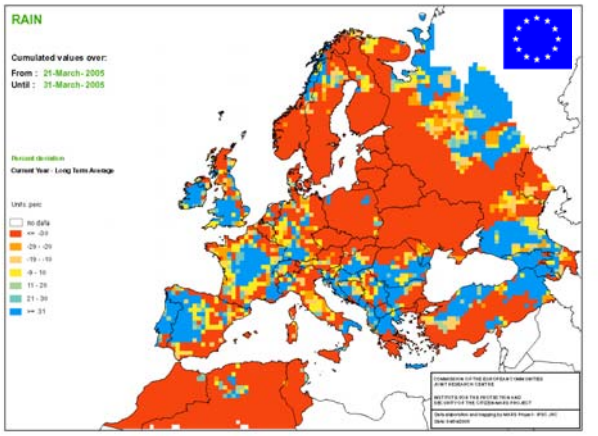
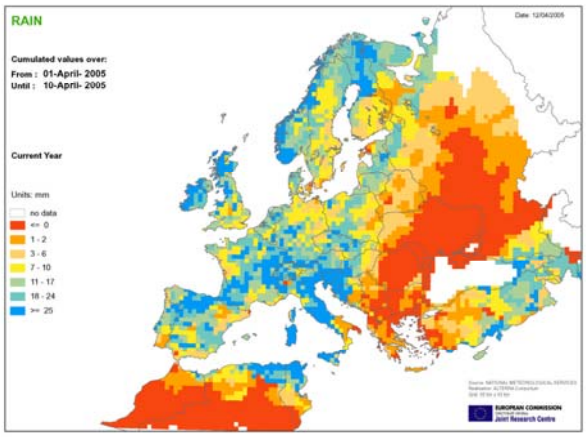
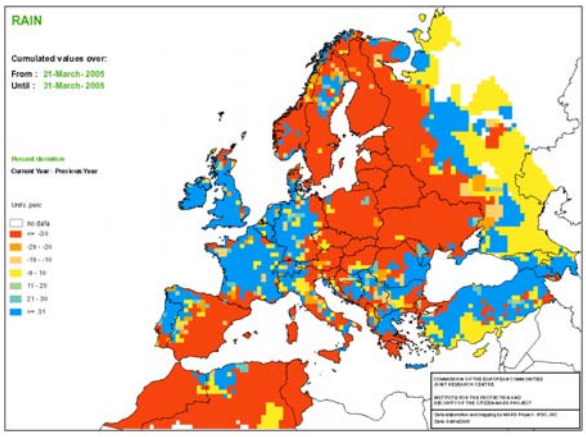
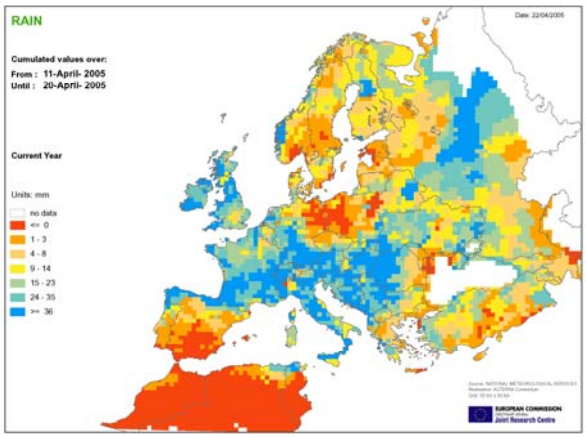
Until : 31-March-2005
Current Year
Units: mm
no data
<= 0
1 - 1
2 - 4
5 - 8
9 - 15
16 - 26
>= 27

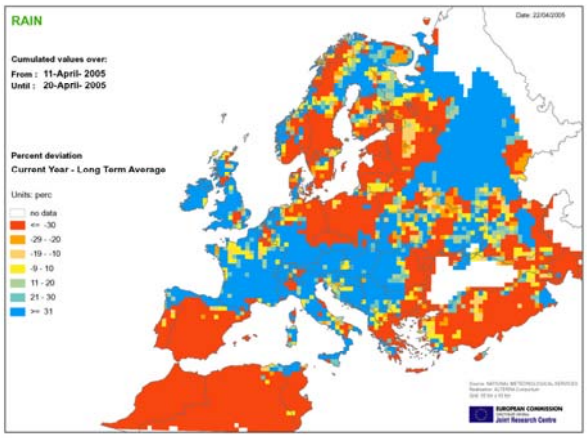

RAIN
Cumulated values over:
From : 21-March-2005
Until : 31-March-2005
Percent deviation
Current Year - Long Term Average
Units: perc
no data
<= -30
-29 - -20
-19 - -10
-9 - 10
11 - 20
21 - 30
>= 31

RAINFALL

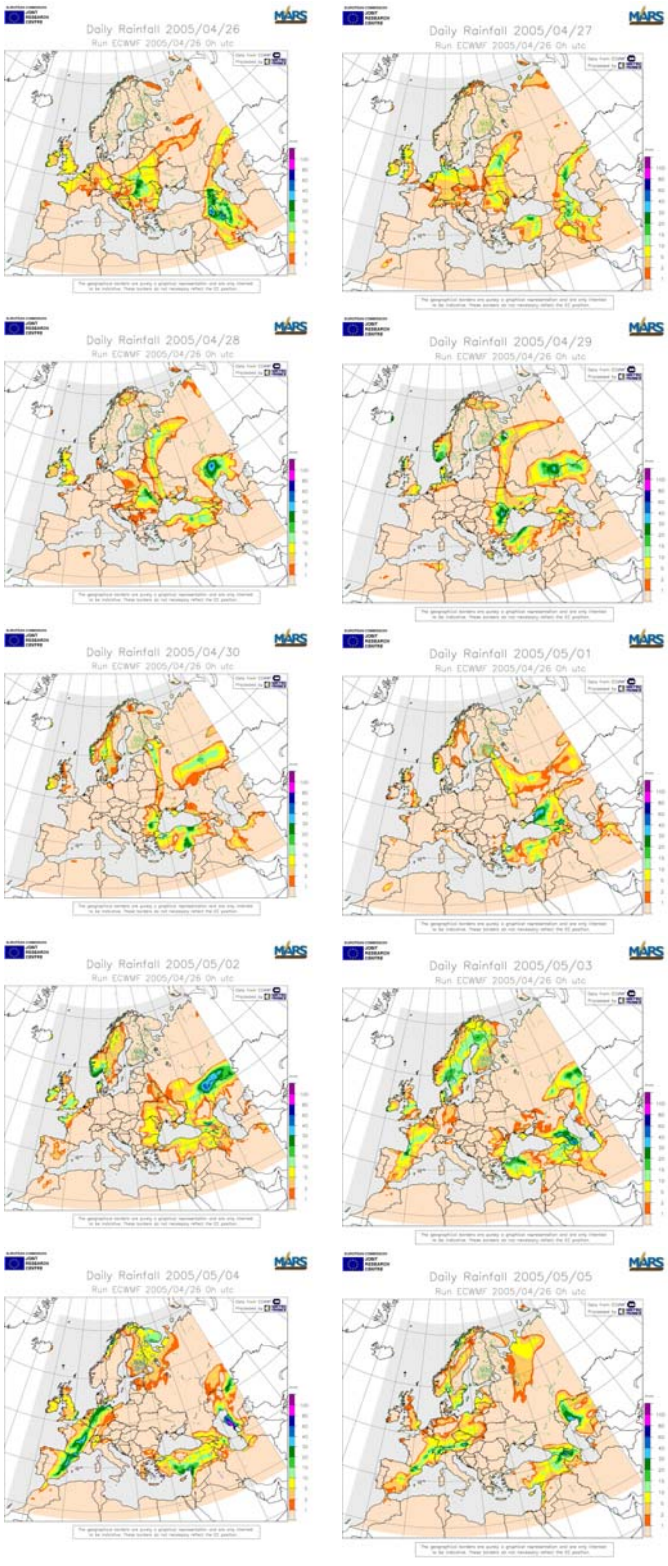

RAIN
Cumulated values over:
From : 01-April- 2005
Until : 10-April- 2005
Current Year
Units: mm
no data
<= 0
1 - 2
3 - 6
7 - 10
11 - 17
18 - 24
>= 25


RAIN
Cumulated values over:
From : 21-March- 2005
Until : 31-March- 2005

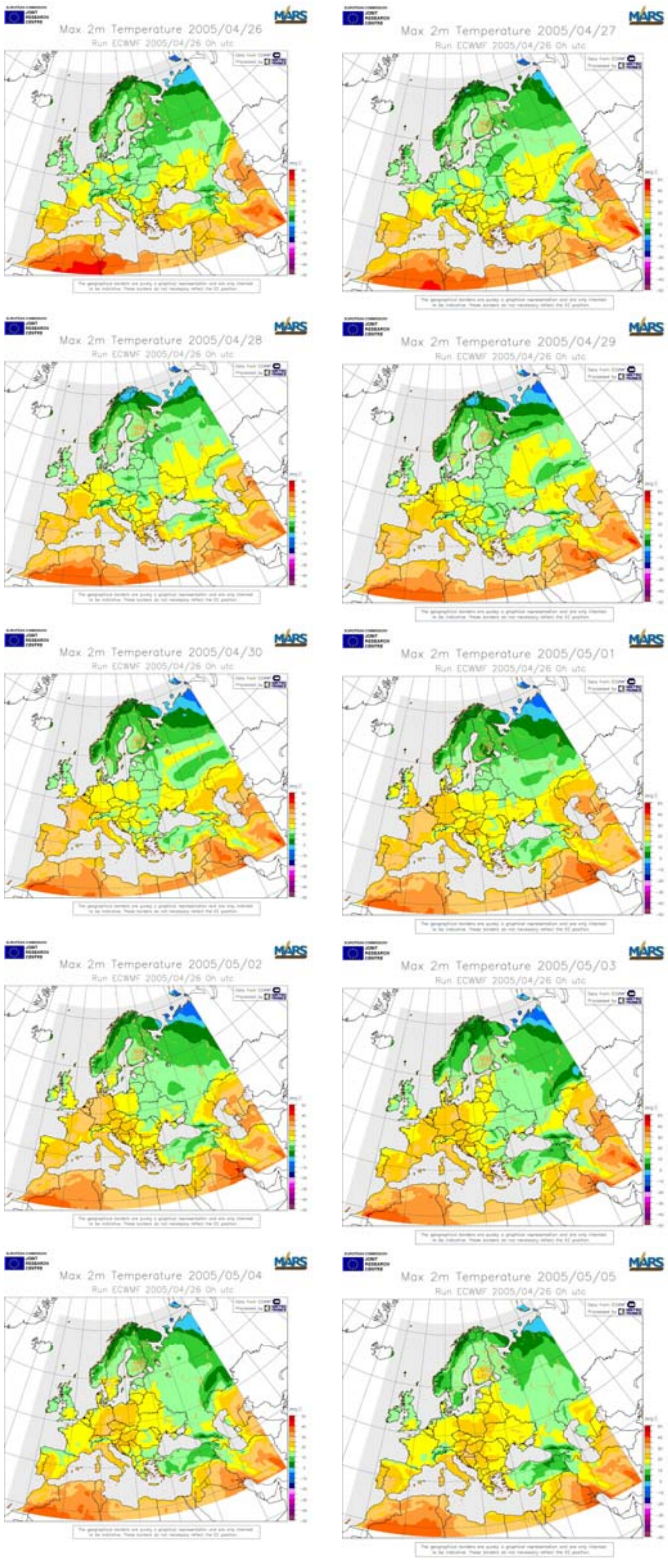

RAIN
Cumulated values over:
From : 11-April- 2005
Until : 20-April- 2005
Current Year
Units: mm
no data
<= 0
1 - 3
4 - 8
9 - 14
15 - 23
24 - 35
>= 36


RAIN
Cumulated values over:
From : 11-April- 2005
Until : 20-April- 2005
Percent deviation
Current Year - Long Term Average
Units: perc
no data
<= -30
-29 - -20
-19 - -10
-9 - 10
11 - 20
21 - 30
>= 31

WEATHER FORECAST - RAIN



WEATHER FORECAST - TMAX



WEATHER FORECAST - TMIN