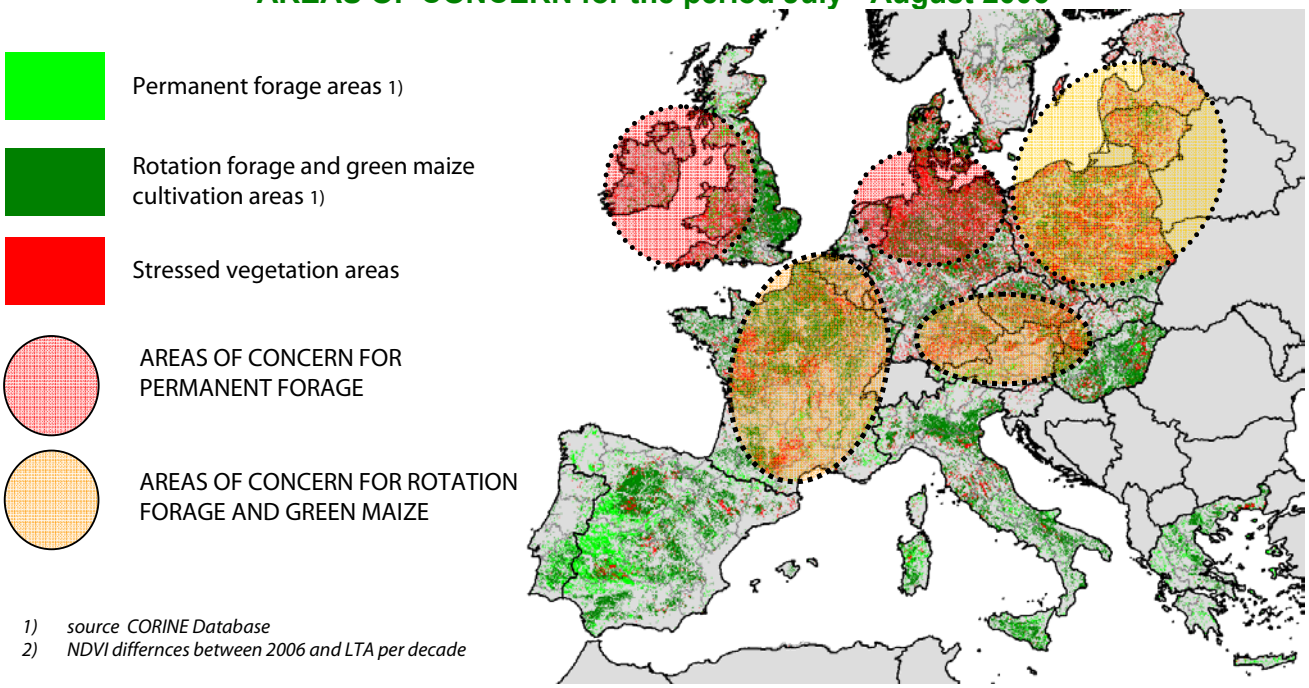
Warm and dry weather in July caused reductions to biomass availability for grazing and forage cutting as well as green maize production. The drought eased in August but the shortages will probably force cattle and sheep farmers to turn to forage stocks.

AREAS OF CONCERN for the period July - August 2006



1) *source CORINE Database*
2) *NDVI differnces between 2006 and LTA per decade*

PERMANENT FORAGE: During July 2006, precipitation deficits combined to higher than average temperatures, affected the green biomass available for grazing in the north and western EU. Main problem areas were the west coast of the British Isles, central and western France, northern Germany, the upper Danube Valley as well as eastern Poland and Baltic countries. Almost everywhere, the drought eased during August but these late precipitations were not sufficient to supplement the overall shortage accumulated in the previous period and this most likely lead to the early use of dry forage reserves with a possible impact on the availability for the coming seasons.

ROTATION FORAGE and GREEN MAIZE: Fodder crops and green maize followed the same trends reported over most arable land in the EU-25 countries. Dry and warm weather affected the second cut of green fodder in the western British Isles, central France and the North Sea coast of Germany and Holland. Similar conditions were reported for green maize production areas in the Danube Valley, southern France and the Padana Valley in Italy. Precipitation in August alleviated the drought in north-central Europe while conditions remained dry over Ireland and most of the UK. In some areas of southern Europe, the availability of irrigation water faced restrictions, causing potential reductions to production levels.

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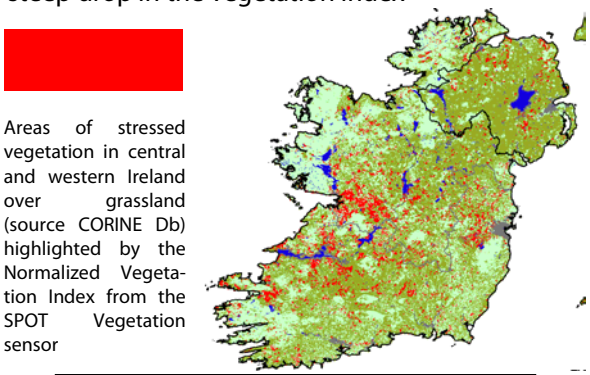
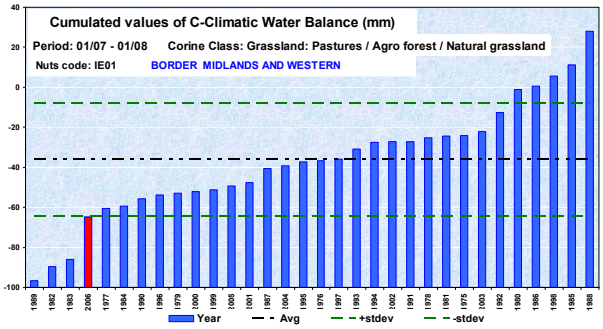
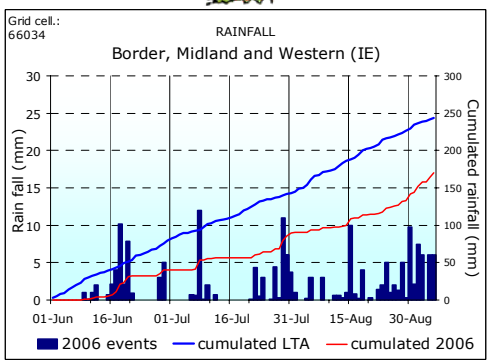
PERMANENT FORAGE

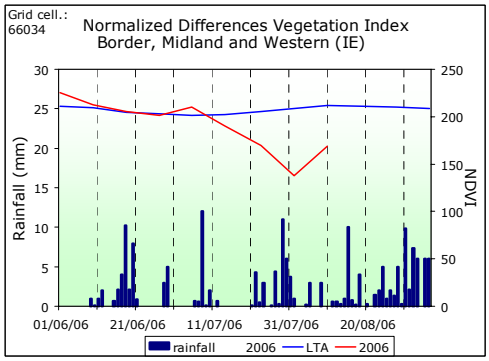
Ireland: The west coast of Ireland experienced a precipitation deficit from mid June until the end of August, combined to several heat waves. A steep drop in the vegetation index at the end of August, measured by the SPOT satellite Vegetation sensor, also highlights this in what, according to the climatic water balance, appears to be one of the worst seasons in the past 32 years



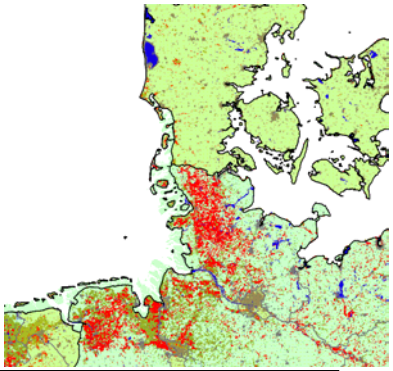
Areas of stressed vegetation in central and western Ireland over grassland (source CORINE Db) highlighted by the Normalized Vegetation Index from the SPOT Vegetation sensor



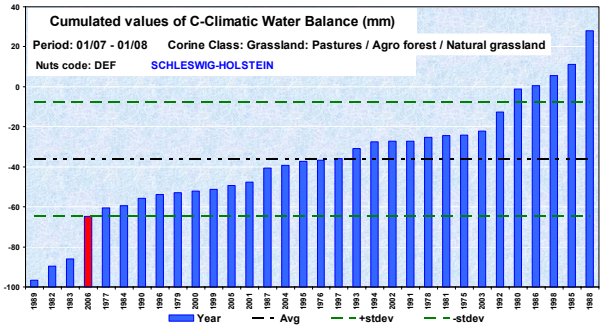


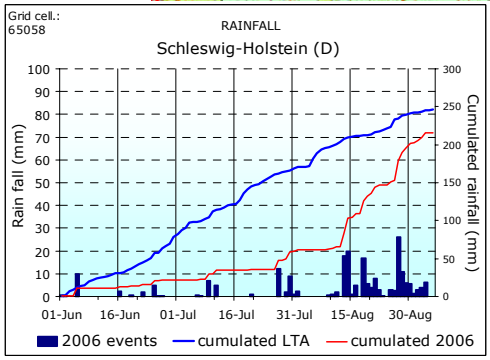


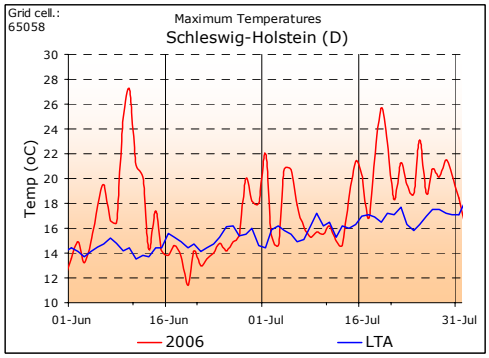
Northern Germany: The North-Sea coast of Germany and The Netherland experienced a severe drought from June to August. A 60 % reduction of cumulated rainfall from the long term average was associated with heat waves. The situation eased from mid August but it, most probably, affected cattle farmers forcing them to use dry forage reserves to compensate for the lack of green biomass on pastures.



Areas of stressed pasture and grassland (source CORINE DB) in the Schleswig-Holstein and Weser Elm regions as highlighted by the Normalized Vegetation Index from SPOT Veg. satellite sensor







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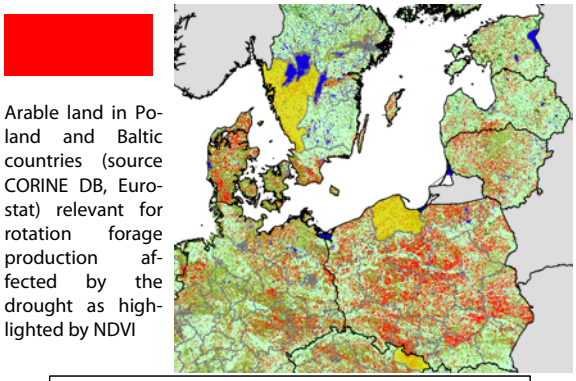
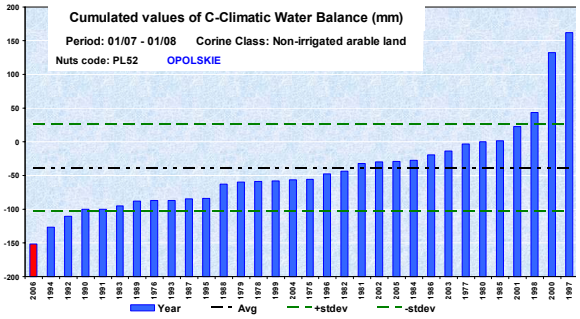
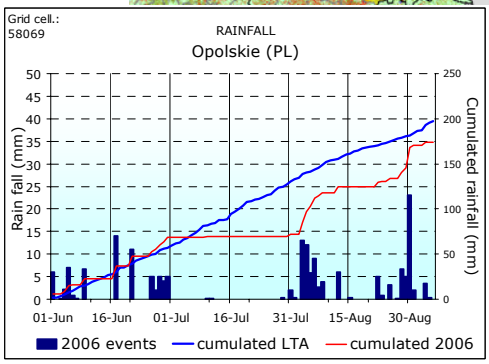
ROTATION FORAGE

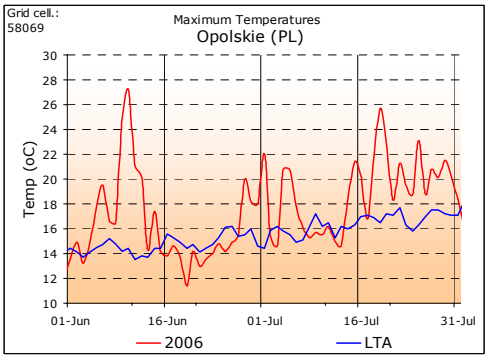
Poland and Baltic Countries: In Poland and Baltic countries, forage production was severely affected but rainfall shortages and high temperatures starting from mid June. The climatic water balance for some of the southern areas of Poland (Opolskie) is the worst in the last 32 years. Forage crops could be affected by losses from -30 to -100 %) and cattle farmers will probably be forced to turn to reserves thus falling short of hay winter stocks



Arable land in Poland and Baltic countries (source CORINE DB, Eurostat) relevant for rotation forage production affected by the drought as highlighted by NDVI

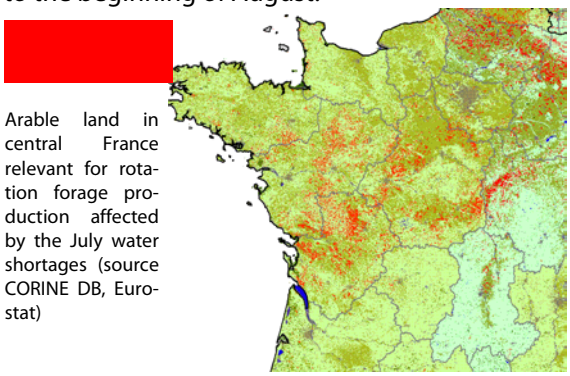




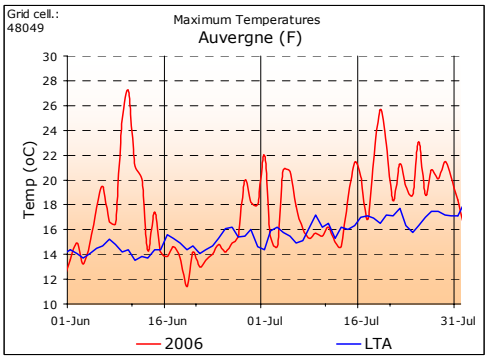


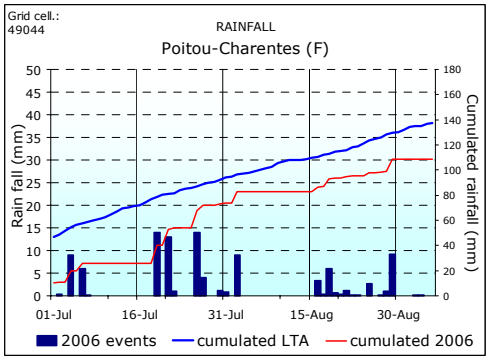
Western France: Rotation forage crops in western France were affected by a precipitation deficit and a number of heat waves from early July to the beginning of August.

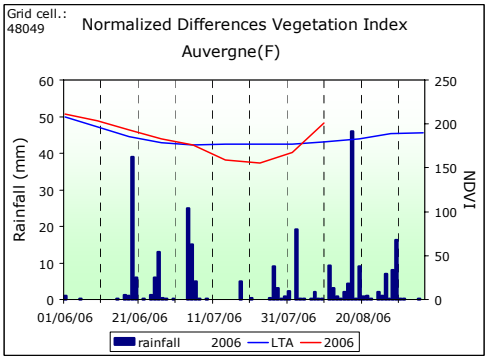
The effect on the crops is highlighted by the trend of satellite vegetation index in July. These conditions caused significant reductions in the second cut of forage.



Arable land in central France relevant for rotation forage production affected by the July water shortages (source CORINE DB, Eurostat)







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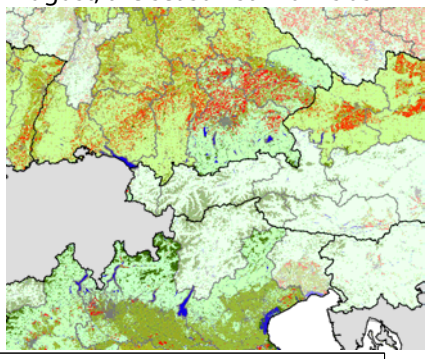
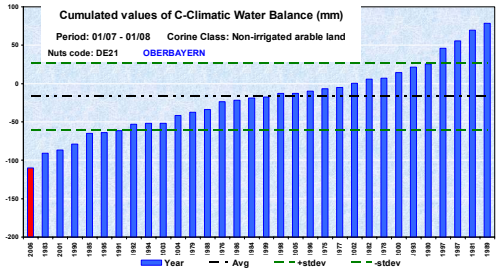
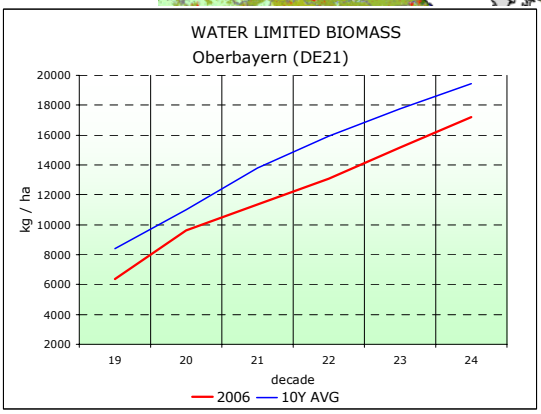
MAIZE FORAGE

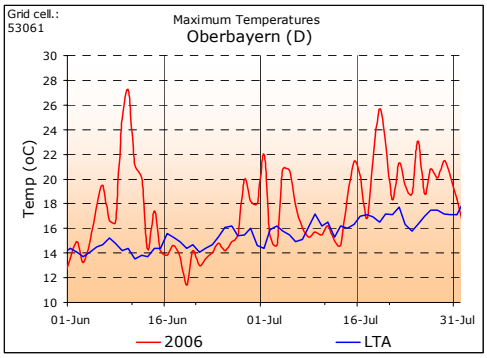
Southern Germany and Danube valley: Green maize production areas in central Europe suffered from rainfall deficits and high temperatures starting from July. Even though rain picked up significantly at the beginning of August, the season still ranks as one of the worst in the past 32 years from the climatic point of view. Even though the August rains could allow a certain recovery, production level will be negatively affected, as suggested by the productivity estimates.



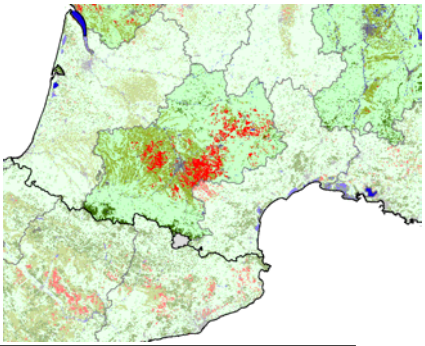
Green maize production areas affected by the drought (sources CORINE DB and Eurostat) in the Danube Valley



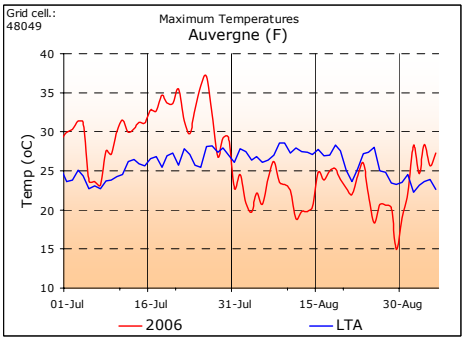


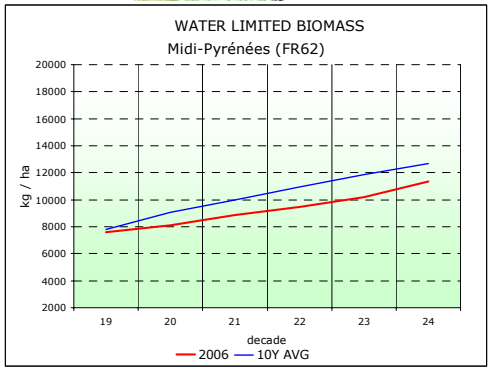


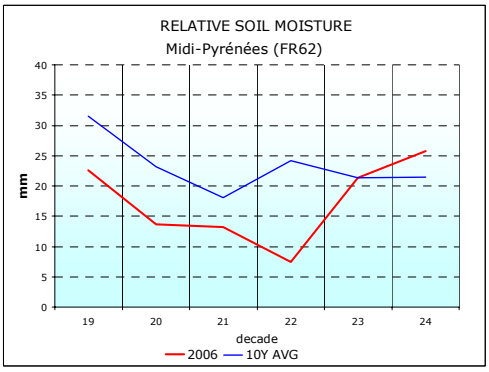
Southern France: Green maize production areas in southern France (Midi-Pyrénées Dept.), as other regions of the country, suffered from a rainfall deficit and high temperatures. Cumulated rainfall was -30% to –50% below the long-term average in July and August. Though the maize production areas have irrigation, limitation to water use could have affected the production levels



Green maize production areas affected by the summer drought in southern France (sources CORINE DB and Eurostat)







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