



WEEKLY AGRICULTURAL REPORT



OCTOBER 25, 2018



BUENOS AIRES GRAIN EXCHANGE
DEPARTMENT OF AGRICULTURAL
ESTIMATES



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- ◆ I - NOA (Noroeste Argentino)
- ◆ II - NEA (Noreste Argentino)
- ◆ III - Centro-Norte de Córdoba
- ◆ IV - Sur de Córdoba
- ◆ V - Centro-Norte de Santa Fe
- ◆ VI - Núcleo Norte
- ◆ VII - Núcleo Sur
- ◆ VIII - Centro-Este de Entre Ríos
- ◆ IX - Norte de La Pampa - Oeste de Buenos Aires
- ◆ X - Centro de Buenos Aires
- ◆ XI - Sudoeste de Buenos Aires - Sur de La Pampa
- ◆ XII - Sudeste de Buenos Aires
- ◆ XIII - San Luis
- ◆ XIV - Cuenca del Salado
- ◆ XV - Corrientes - Misiones

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AGRICULTURAL WEATHER OUTLOOK OCTOBER 25 TO 31, 2018

PRECIPITATIONS OF VARYING INTENSITY, COUPLED WITH LOW TEMPERATURES AND A FINAL TEMPERATURE RISE.

The current perspective begins with the entry of a storm front of irregular activity that will affect most part of the agricultural area. Northern Paraguay will receive severe storms with torrential showers, winds and hail. Cuyo and the Pampas region will receive moderate storms. Coupled with the front, winds will rotate towards the south/southeast, leading to a sharp drop in temperatures. The west and southeast of the Argentine agricultural area and most part of Uruguay's will observe lows under 10°C.

SOYBEAN

Over the last few days, soybean planting has begun in the center of the national agricultural area. Water moisture is adequate. To date, national planting progress is estimated at 2 % of the 19,9 million hectares projected for the new season. YoY progress stands at 0,2 percentage points.

CORN

Since our last report, planting has progressed at a good pace. The most advanced plots are differentiating leaves. Moisture condition has improved in most part of the area with the exception of southern Córdoba, which continues with tight reserves. Most of the planting progress took place in the provinces of Buenos Aires and Córdoba, where the ideal planting window for early plots is almost finished. To date, corn is 34.4 % planted. Weekly progress stands at 1.8 percentage points. Under this scenario, we maintain our final planting projection at 5.8M Ha. Up, 300,000 hectares YoY. (Season 2017/18: 5,500,000 Ha). Plots with corn planted at the beginning of the ideal window are in good condition while nitrogen fertilization is being applied.

SUNFLOWER

To date, sunflower is 56% planted out of the 1,900,000 hectares projected for the current campaign. Weekly progress is estimated at 8.2 percentage points and was concentrated mainly on the productive regions of Buenos Aires and La Pampa. At the same time, YoY progress stands at 5.4 percentage points due to good moisture conditions, Regarding the growth and development of the oilseed, plots in the NEA region and north-central Santa Fe range from leaf differentiation to flowering stage under adequate moisture and sanitary conditions.

WHEAT

During the last weeks, the yield expectations in the regions affected by different climatic events were analyzed. The first results have shown that the frosts at the beginning of October had an impact on the yield potential of those plots that were at heading stage, mainly in the north and south belts and southern Córdoba. At the same time, the fall of hail and water surpluses are likely to increase the area loss in large sectors of the province of Buenos Aires and the south of Santa Fe. However, yields are above initial expectations in the north-center of Santa Fe, the east-center of Entre Ríos, the southwest of Buenos Aires and the south of La Pampa. Our final production projection is adjusted to 19,400,000 tons, 1.5% below the 19.7 MT estimated in the Third Congress of Agricultural Perspectives of the Grain Exchange. To date, the national harvest progress is estimated at 2.8% with an average national yield of 1.45 tons / ha and a production volume of more than 250,000 tons.

BARLEY

Rains accumulated during the last fifteen days continue to provide good moisture to plots in the center and south of the national agricultural area. Growth progress ranges from heading to grain filling under adequate moisture and crop condition. The recent frosts and strong storms with hailfall could affect the potential of the most affected plots in the west and south of the province of Buenos Aires. We do not rule out adjusting our final production estimate.



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ANNEX

CORN

2018/19 Season

As of: Oct. 24, 2018

Zone	Hectareage (Ha)		Percentage Planted (%)	Hectares Planted	
	2017/18	2018/19			
I	NOA	382.000	405.000	-	-
II	NEA	612.000	644.000	-	-
III	Ctro N Cba	820.000	855.000	14,6	124.403
IV	S Cba	688.000	720.000	19,6	141.120
V	Ctro N SFe	224.000	242.000	35,0	84.700
VI	Núcleo Norte	539.000	580.000	87,0	504.600
VII	Núcleo Sur	417.000	445.000	85,0	378.250
VIII	Ctro EER	178.000	190.000	60,0	114.000
IX	N LP-OBA	590.000	620.000	47,5	294.500
X	Ctro BA	305.000	318.000	37,8	120.204
XI	SO BA-S LP	168.000	176.000	35,0	61.600
XII	SE BA	200.000	210.000	21,0	44.100
XIII	SL	234.000	246.000	20,0	49.200
XIV	Cuenca Sal	112.000	117.000	40,5	47.385
XV	Otras	31.000	32.000	100,0	32.000

TOTAL

5.500.000

5.800.000

34,4

1.996.062

SUNFLOWER

2018/19 Season

As of: Oct. 24, 2018

Zone	Hectareage (Ha)		Percentage Planted (%)	Hectares Planted	
	2017/18	2018/19			
I	NOA	-	-	-	-
II	NEA	380.000	440.000	100,0	440.000
III	Ctro N Cba	5.000	6.000	100,0	6.000
IV	S Cba	21.000	22.000	70,0	15.400
V	Ctro N SFe	260.000	280.000	100,0	280.000
VI	Núcleo Norte	12.000	12.000	100,0	12.000
VII	Núcleo Sur	9.000	9.000	50,0	4.500
VIII	Ctro E ER	7.000	8.000	100,0	8.000
IX	N LP-OBA	110.000	140.000	26,0	36.400
X	Ctro BA	55.000	70.000	30,0	21.000
XI	SO BA-S LP	370.000	380.000	22,0	83.600
XII	SE BA	390.000	400.000	25,0	100.000
XIII	SL	24.000	25.000	20,0	5.000
XIV	Cuenca Sal	100.000	100.000	44,0	44.000
XV	Otras	7.000	8.000	100,0	8.000
TOTAL		1.750.000	1.900.000	56,0	1.063.900

WHEAT

2018/19 Season

As of: Oct. 24, 2018

Zone	Hectareage (Ha)		Percentage Planted (%)	Hectares Planted	
	2017/18	2018/19			
I	NOA	390.000	390.000	100,0	390.000
II	NEA	465.000	465.000	100,0	465.000
III	Ctro N Cba	610.000	630.000	100,0	630.000
IV	S Cba	385.000	425.000	100,0	425.000
V	Ctro N SFe	450.000	485.000	100,0	485.000
VI	Núcleo Norte	830.000	860.000	100,0	860.000
VII	Núcleo Sur	542.000	590.000	100,0	590.000
VIII	Ctro E ER	260.000	280.000	100,0	280.000
IX	N LP-OBA	408.000	495.000	100,0	495.000
X	Ctro BA	260.000	340.000	100,0	340.000
XI	SO BA-S LP	485.000	530.000	100,0	530.000
XII	SE BA	505.000	580.000	100,0	580.000
XIII	SL	9.000	10.000	100,0	10.000
XIV	Cuenca Sal	85.000	100.000	100,0	100.000
XV	Otras	16.000	20.000	100,0	20.000
TOTAL		5.700.000	6.200.000	100,0	6.200.000

BARLEY

2018/19 Season

As of: Oct. 24, 2018

Zone	Hectareage (Ha)		Porcentage Planted (%)	Hectares Planted	
	2017/18	2018/19			
I	NOA	-	-	-	
II	NEA	-	-	-	
III	Ctro N Cba	3.000	3.000	100,0	
IV	S Cba	12.000	12.000	100,0	
V	Ctro N SFe	5.000	5.000	100,0	
VI	Núcleo Norte	42.000	42.000	100,0	
VII	Núcleo Sur	70.000	70.000	100,0	
VIII	Ctro EER	8.000	8.000	100,0	
IX	N LP-OBA	95.000	105.000	100,0	
X	Ctro BA	60.000	68.000	100,0	
XI	SO BA-S LP	208.000	250.000	100,0	
XII	SE BA	387.000	425.000	100,0	
XIII	SL	-	-	-	
XIV	Cuenca Sal	10.000	12.000	100,0	
XV	Otras	-	-	-	
TOTAL		900.000	1.000.000	100,0	1.000.000