1 - UNITED STATES
April freezes, following a warm March, threatened a variety of crops, including blooming fruits and jointing to heading winter wheat. Some of the greatest impacts on wheat occurred across the central and southern Plains. Late in the month, chilly conditions lingered in the East, while warmth fostered early-season planting efforts across the Plains and western and central Corn Belt. However, drought intensified during April in several areas, including California, the Great Basin, and the Northwest. Drought also worsened—albeit early-season heat—across the Deep South, although late-month showers provided some relief in Florida. Meanwhile, frequent downpours maintained soggy conditions and perpetuated fieldwork delays across the interior South. Wetness extended into the eastern Corn Belt. Elsewhere, pockets of drought persisted from the Southwest to the High Plains; in the latter region, locally poor winter wheat conditions were exacerbated by the mid-April cold snap.

2 - CANADA
As of early May, Prairie spring crop planting had been limited by factors including low soil temperatures, pockets of excessive wetness, and unavailability of fields due to unharvested 2019 crops.

3 - SOUTH AMERICA
Persistent drought further limited yield potential of second crop corn in southern Brazil, though conditions were favorable in key production areas farther north. In Argentina, April showers improved moisture for winter crop establishment in most major production areas.

4 - EUROPE
Acute dryness during April reduced moisture supplies for winter crops across much of central and northern Europe. Dry weather was most pronounced in England, Germany, Poland, and northern portions of Italy and the Balkans. Above-normal temperatures accelerated wheat and rapeseed toward or into reproduction up to two weeks ahead of average over central and western growing areas. However, timely rain in early May helped stabilize winter crop prospects in these same locales, but more rain will be needed to sustain the recent crop recovery. Conversely, moderate to heavy rain over Spain eased lingering winter dryness concerns and boosted yield prospects for reproductive wheat and barley.

5 - FSU
 Pronounced dryness during April reduced soil moisture for winter grains and oilseeds across many key growing areas adjacent the Black Sea. However, below-normal temperatures slowed crop development rates and afforded drought-affected growing areas additional time to take advantage of more recent early May rainfall. Farther east, dry, warm conditions favored spring wheat sowing in Russia’s Siberia District, while unsettled weather slowed fieldwork in northern Kazakhstan.

6 - NORTHWESTERN AFRICA
Above-normal rainfall in April maintained good to excellent yield prospects for reproductive to filling winter wheat and barley over the eastern half of the region. Conversely, showers in Morocco were too late to improve yields for drought-affected wheat and barley.

7 - MIDDLE EAST AND TURKEY
In April, widespread rainfall maintained good to locally exceptional yield prospects for winter grains, particularly from southeastern Turkey into western Iran. Wheat and barley progressed through reproduction in southern portions of the region in excellent condition, while crops approached reproduction in the north by month’s end.

8 - SOUTH ASIA
Seasonal heat was beginning to overspread parts of Pakistan and India in April, but much of interior India reported below-normal temperatures. The relative cooler-than-normal weather in the interior was directly related to above-average rainfall for the month. In particular, the north and east reported well-above-average rainfall, slowing fieldwork preparations for cotton (north) and rice (east) sowing. However, the wet weather added to irrigation supplies.

9 - SOUTHEAST ASIA
Seasonal rainfall began to migrate northward in the region but remained mostly in Malaysia and Indonesia. In fact, the increased showers in Malaysia and neighboring portions of Indonesia improved short-term soil moisture for oil palm and eased longer-term deficits. Meanwhile, pre-monsoon heat began to build in Thailand and environs, with occasional rainfall adding to irrigation supplies ahead of the main planting season for rice and other crops. In the Philippines, rainfall remained in eastern-most districts, as rice growers await the onset of the southwest monsoon.

11 - AUSTRALIA
During April, above-normal rainfall in southeastern Australia helped refill the soil moisture profile in advance of winter crop planting. The soaking rain triggered widespread wheat, barley, and canola sowing in its wake and helped promote early crop growth. Elsewhere in the wheat belt, mostly dry weather in southern Queensland favored cotton and sorghum harvesting but slowed winter wheat germination and emergence. Similarly, drier-than-normal weather in Western Australia enabled winter crop planting to progress, albeit at a modest pace as some farmers await more abundant rainfall prior to sowing.

Produced by USDA Office of the Chief Economist (OCE) World Agricultural Outlook Board (WAOB)

Next Release: June 11, 2020