



WEEKLY AGRICULTURAL REPORT

JULY 11, 2024



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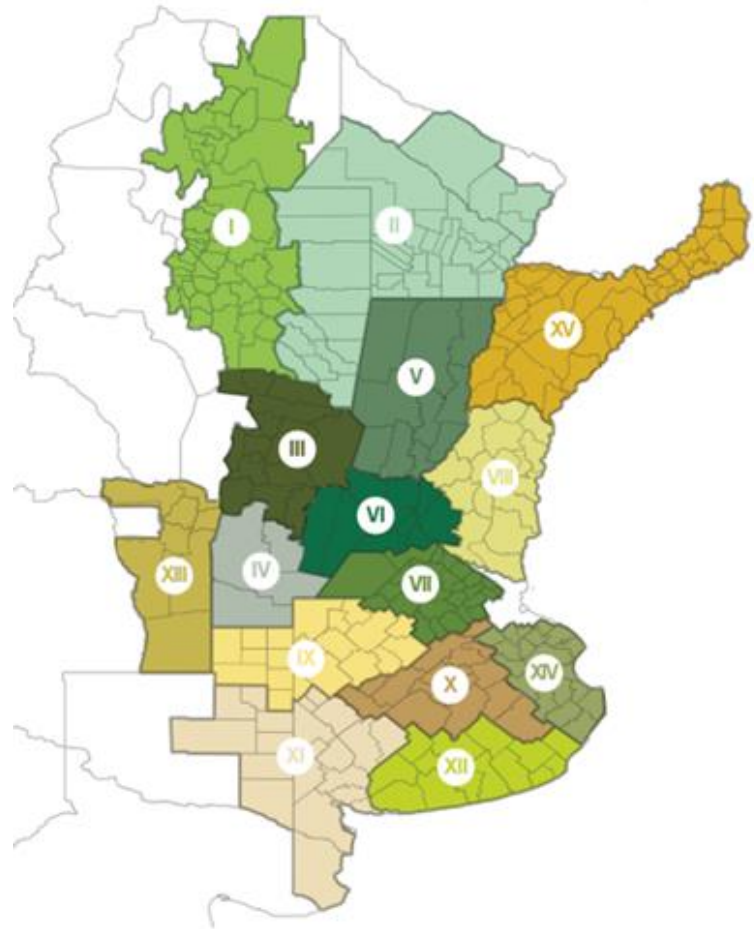
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I - NWA (North-West Argentina)
II - NEA (North-East Argentina)
III - North-Central Córdoba
IV - South Córdoba
V - North-Central Santa Fe
VI - North Belt
VII - South Belt
VIII - East-Central Entre Ríos

IX - North La Pampa - West Buenos Aires
X - Central Buenos Aires
XI - South-West de Buenos Aires - South La Pampa
XII - South-East Buenos Aires
XIII - San Luis
XIV - Cuenca del Salado
XV - Others

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We appreciate the contribution of our Network of Collaborators throughout the country.

AGRICULTURAL WEATHER OUTLOOK: JULY 11 TO JULY 17, 2024:

POLAR WAVE, WITH LOW TEMPERATURES, SCARCE PRECIPITATION, AND POSSIBLE SNOWFALL

At the beginning of the first stage of the outlook, polar winds will continue to enter, resulting in below-normal minimum temperatures across most of the agricultural area. Agronomic frosts will occur throughout its extent, except in the far north, with widespread general frosts in the mountainous areas of the west, central Pampas region, and Uruguay. Tropical winds will return weakly, reaching northern parts of the agricultural area with above-normal maximum temperatures. However, they won't reach the central and southern areas, which will continue to experience temperatures below the seasonal average. The process will conclude with the arrival of a weak Pampero front, leaving most of the agricultural area with minimal to no precipitation, except for isolated spots. The most significant precipitation is expected over northern Uruguay. Conditions will favor the occurrence of abundant snowfall, with light snow possible over western and southern Argentina and much of Uruguay, though chances are low for its actual occurrence.



WHEAT

After a weekly progress of 7.6 percentage points, wheat planting has reached 92.9% of the projected 6.3 million hectares for the 2024/25 season. Due to the low temperatures in recent weeks, fields in the northern agricultural area show reduced growth and some frost damage on leaf tips, while the latest planted fields in the central and southern areas are experiencing delays in emergence. As of this report, the Regular-Dry water condition covers 31.7% of the standing area (+5.4 percentage points compared to the previous week). Nevertheless, 97.2% maintain a Normal-Excellent condition.

BARLEY

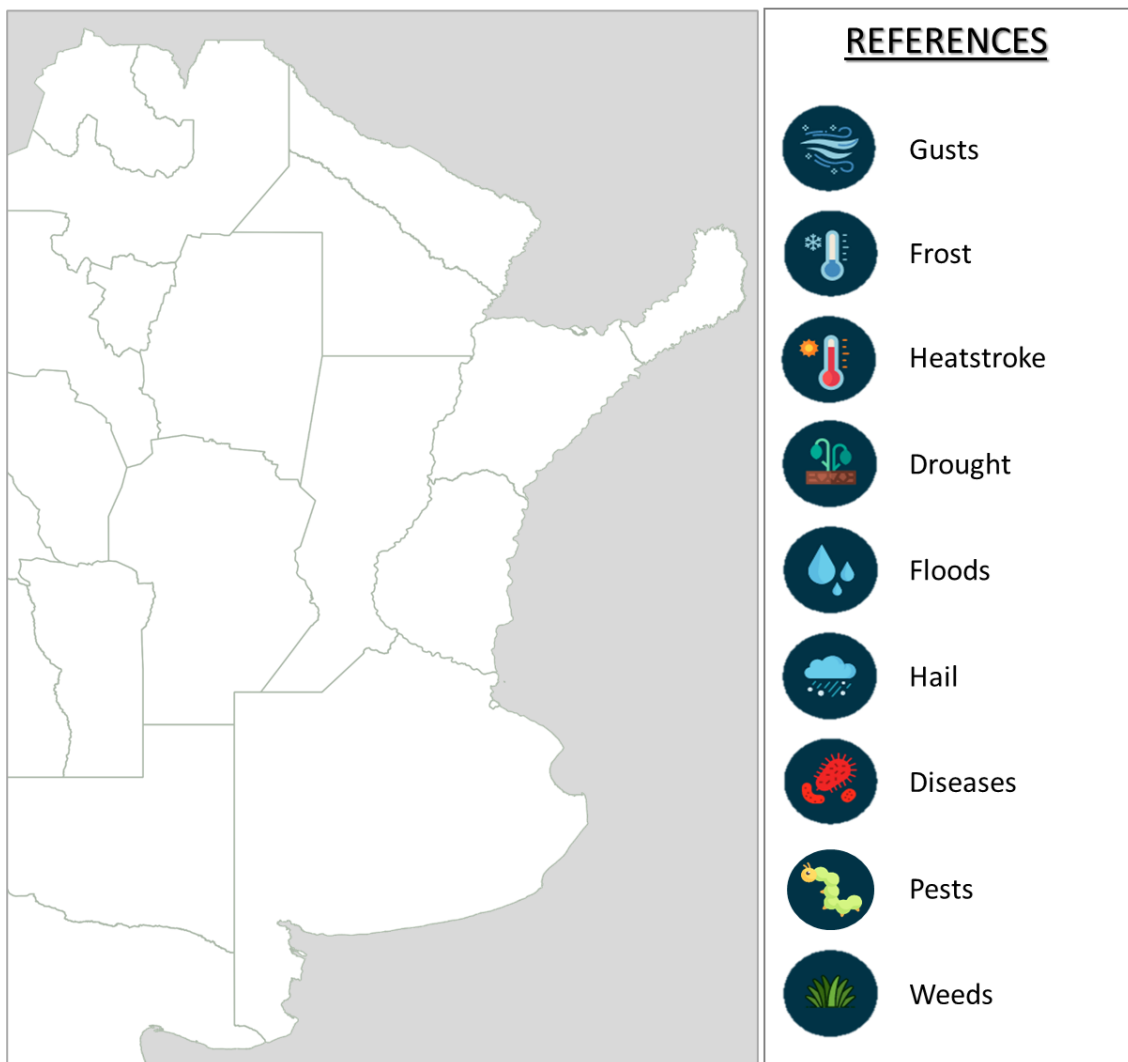
Additionally, following a bi-weekly progress of 39 percentage points, barley planting covers 88% of the projected national area. This represents a 11 percentage point advancement compared to the previous season, driven by favorable moisture at the beginning of the planting window. Planting has concluded in the central region, except in the North of La Pampa-West of Buenos Aires, where new precipitation is needed to complete planting plans. Early sowings have entered the tillering stage under good moisture conditions. Meanwhile, in the southern barley-growing areas, planting activities are nearing completion, with 22% of the projected area left to sow. Like wheat, recent plantings are experiencing delays in emergence due to low temperatures.

CORN

To conclude, the commercial maize grain harvest continues at a good pace in the central and northern regions of the country, with slower progress observed in the southern agricultural area. Low temperatures have helped reduce grain moisture, resulting in a weekly progress of 7.3 percentage points and a year-on-year advancement of 12.1 percentage points. The northern agricultural area reports year-on-year yield declines ranging from 30% to 40%, highlighting the impact of both biotic and abiotic adversities. Additionally, the Central-Northern region of Córdoba shows a yield just 8.9% higher than the 2022/23 campaign, while the southern part of the province improved its harvest by 43.5% compared to the previous year. As of now, 70.2% of the estimated total has been harvested, with an average yield of 6.6 tons per hectare. In this context, we maintain our production projection at 46.5 million metric tons.



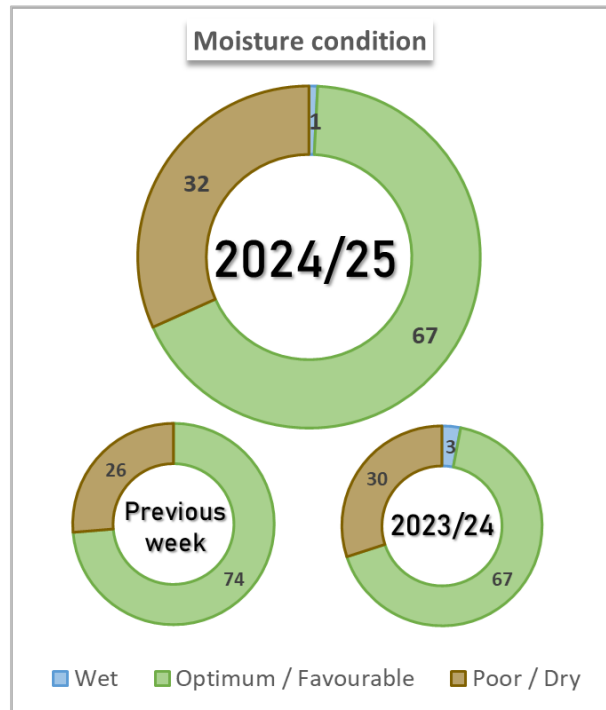
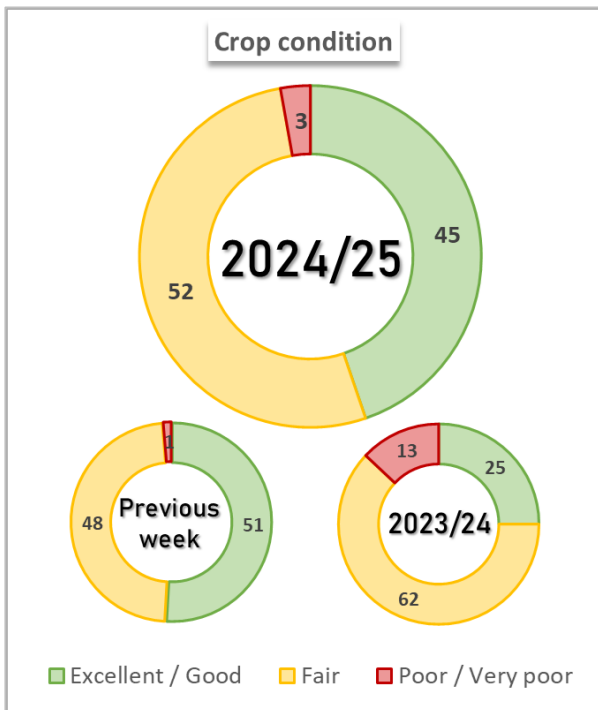
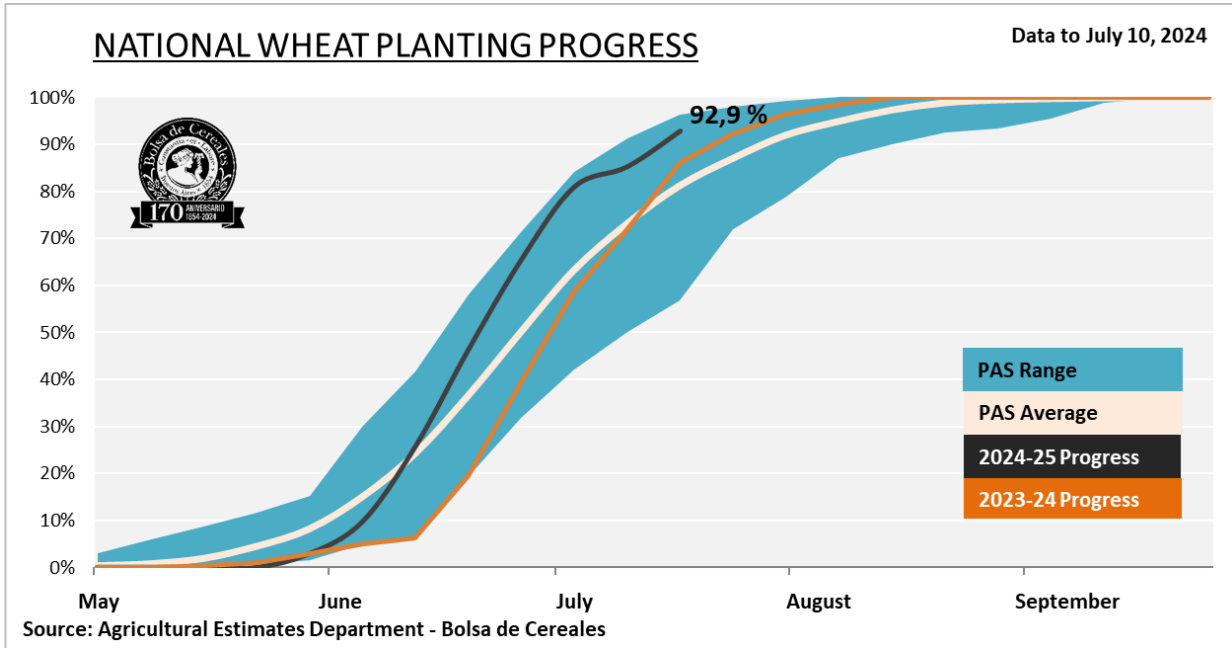
RECENT ADVERSE EVENTS



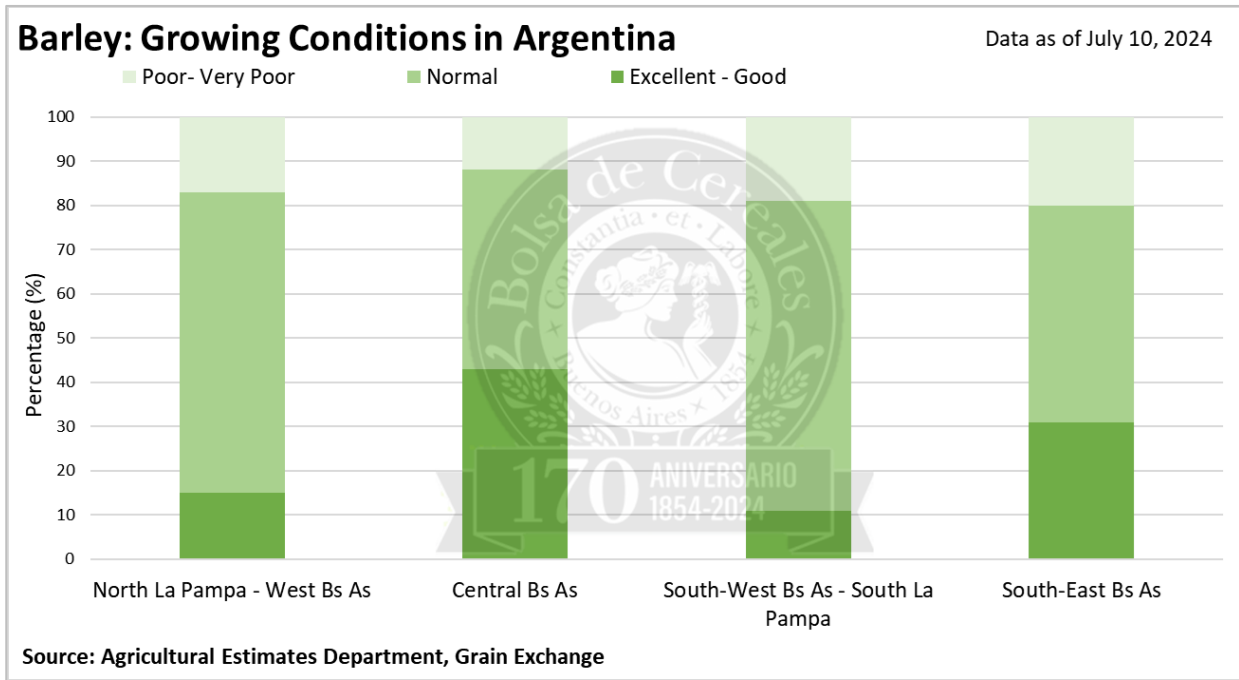
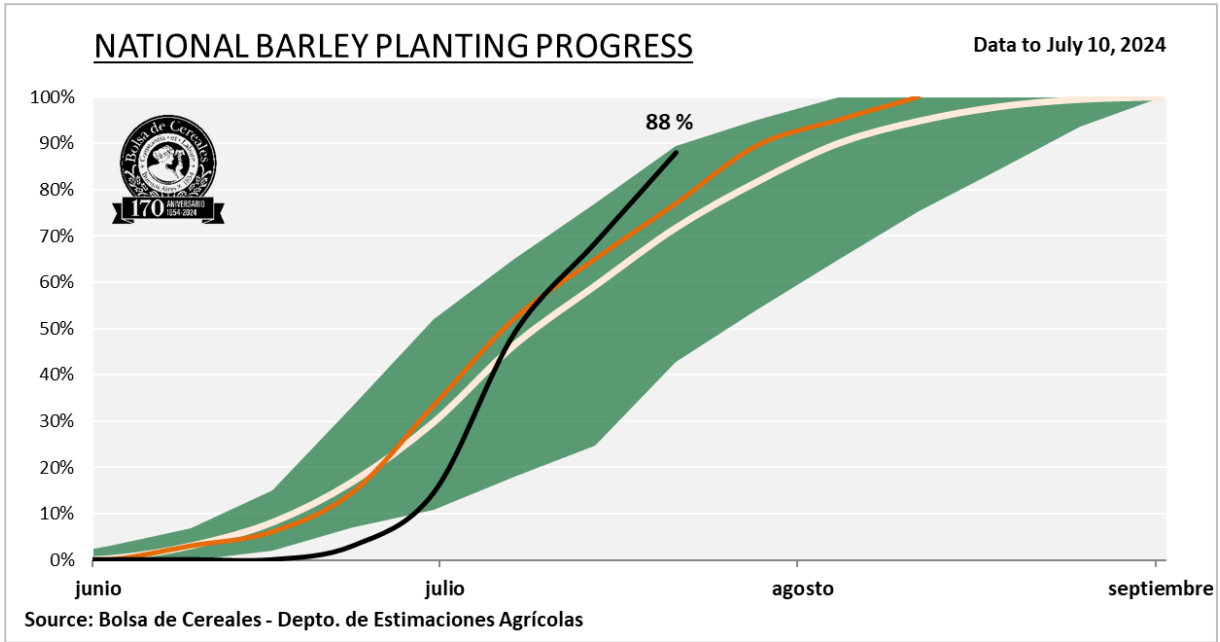
METHODOLOGY

The areas under analysis in this report account for 90 % of the crops planted area. The national planting and harvest progress, as well as the phenological data of the crops derive from the final area projection, while the moisture and crop condition derive from the planting progress to date.

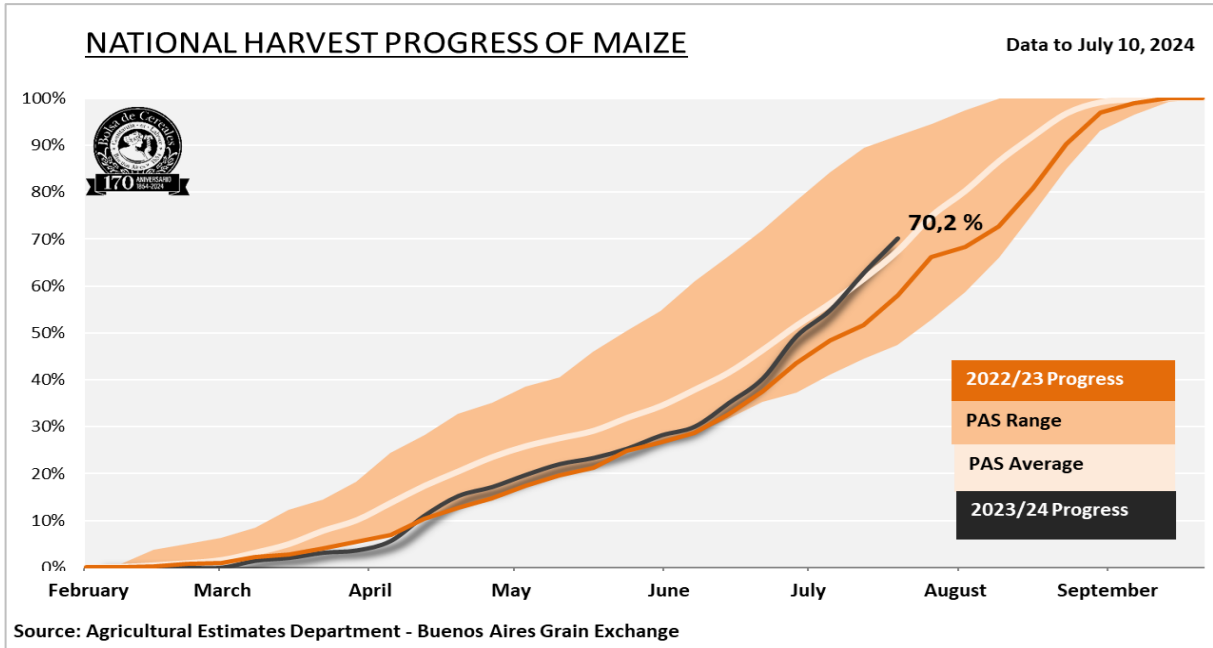
WHEAT



BARLEY



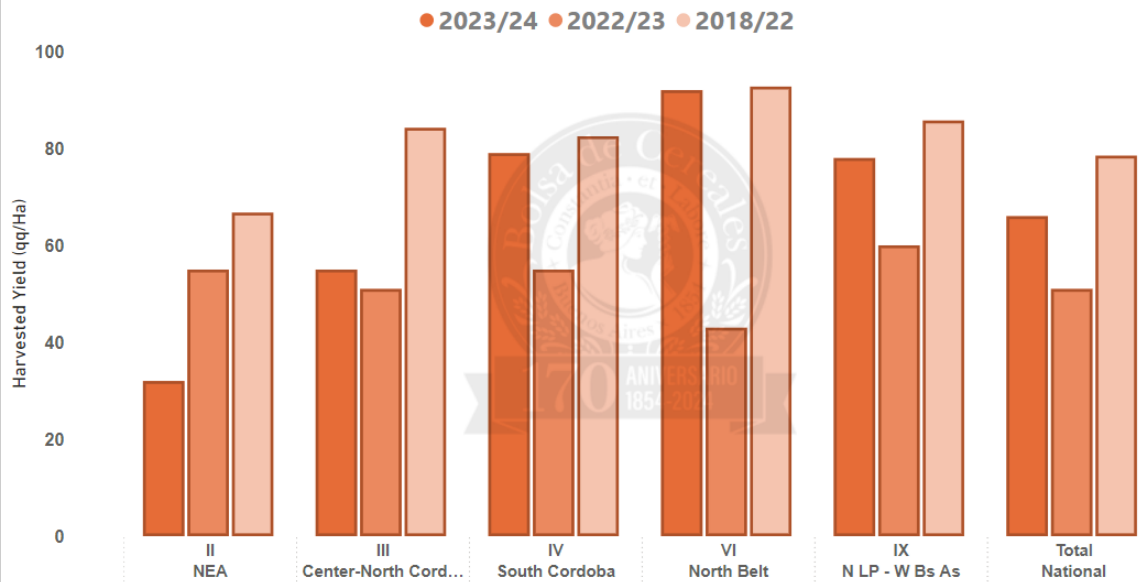
CORN



Corn: Harvested Yield

Data to July 10, 2024

*Corn for grain



Annex

WHEAT

2024/25 Season

Data to: July 10, 2024

Zone	Hectareage (Ha)		Percentage Planted (%)	Hectares Planted
	2023/24	2024/25		
I NWA	280.000	280.000	100,0	280.000
II NEA	384.000	419.000	100,0	419.000
III NCnt Cba	345.000	449.000	100,0	449.000
IV S Cba	218.000	229.000	100,0	229.000
V NCnt SFe	462.000	508.000	100,0	508.000
VI North Belt	592.000	640.000	97,0	620.800
VII South Belt	632.000	683.000	93,0	635.190
VIII ECnt ER	525.000	552.000	82,5	455.400
IX N LP-W BA	375.000	394.000	95,0	374.300
X Cnt BA	418.000	418.000	81,7	341.381
XI SW BA-S LP	709.000	730.000	91,9	670.724
XII SE BA	871.000	906.000	85,9	778.073
XIII SL	11.000	11.000	100,0	11.000
XIV Cuenca Sal	55.000	58.000	100,0	58.000
XV Others	23.000	23.000	100,0	23.000
TOTAL	5.900.000	6.300.000	92,9	5.852.867

BARLEY

2024/25 Season

Data to: July 10, 2024

Zone	Hectareage (Ha)		Percentage Planted (%)	Hectares Planted	
	2023/24	2024/25			
I	NWA	-	-	-	
II	NEA	-	-	-	
III	NCnt Cba	6.000	6.000	100,0	6.000
IV	S Cba	7.000	7.000	100,0	7.000
V	NCnt SFe	4.000	4.000	100,0	4.000
VI	North Belt	15.000	15.000	100,0	15.000
VII	South Belt	50.000	50.000	98,0	49.000
VIII	ECnt ER	6.000	6.000	98,0	5.880
IX	N LP-W BA	135.000	170.000	88,0	149.600
X	Cnt BA	130.000	130.000	85,0	110.500
XI	SW BA-S LP	359.000	370.000	87,0	321.900
XII	SE BA	526.000	530.000	87,5	463.750
XIII	SL	-	-	-	-
XIV	Cuenca Sal	12.000	12.000	95,0	11.400
XV	Others	-	-	-	-
TOTAL		1.250.000	1.300.000	88,0	1.144.030

CORN

2023/24 Season

Data to: July 10, 2024

Zone	Hectareage (Ha)			Percentage Harvested (%)	Hectares Harvested	Yield (qq/Ha)	Production (Tn)
	Sown	Lost	Harvestable				
I NWA	472.400	22.000	450.400	53,0	238.712	38	916.083
II NEA	815.000	72.000	743.000	74,0	549.820	32	1.752.911
III NCnt Cba	1.116.000	83.000	1.033.000	75,6	781.310	55,2	4.313.326
IV S Cba	1.053.000	11.990	1.041.010	47,7	496.622	78,5	3.899.568
V NCnt SFe	292.000	83.200	208.800	86,7	180.973	42,1	761.316
VI North Belt	675.000	22.200	652.800	90,8	592.973	91,7	5.440.392
VII South Belt	542.000	15.418	526.582	89,6	471.633	96,5	4.551.284
VIII ECnt ER	317.000	13.200	303.800	96,9	294.263	66,4	1.954.777
IX N LP-W BA	942.000	15.110	926.890	67,7	627.522	77,6	4.872.035
X Cnt BA	357.000	7.440	349.560	67,8	236.978	68,0	1.610.857
XI SW BA-S LP	215.600	3.920	211.680	51,4	108.718	53,3	578.977
XII SE BA	303.700	4.650	299.050	48,7	145.711	70,5	1.027.045
XIII SL	352.000	6.350	345.650	71,2	245.938	49,9	1.226.419
XIV Cuenca Sal	103.000	3.350	99.650	71,2	70.920	69,6	493.301
XV Others	44.300	1.050	43.250	81,0	35.033	46	161.846
TOTAL	7.600.000	364.878	7.235.122	70,2	5.077.125	66,1	33.560.136

Photo gallery

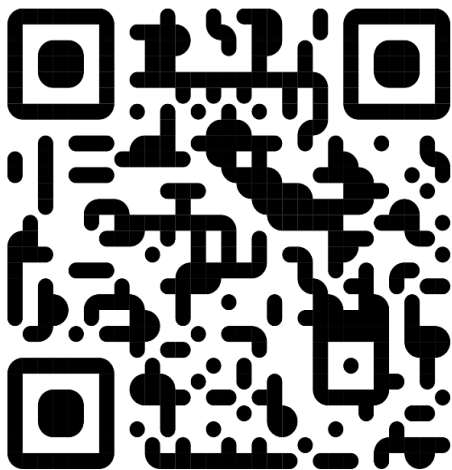




Late-maturing corn in physiological maturity. Carlos Tejedor, Buenos Aires. (09/07/2024). Courtesy of: Lic. Dante A. Garciandía.



Late-maturing corn at physiological maturity. Carlos Tejedor, Buenos Aires. (09/07/2024). Courtesy of: Lic. Dante A. Garciandía.



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