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Report Highlights:

CORRECTER REPORT. This new report repairs table labeling error in previous version.

Estonian farmers can expect another good harvest in MY2016/17. It is forecast that total grain production will diminish to 1.3 million MT, 15 percent lower than last year. Lower grain production forecast comes out from a more average level of yield expectations down from last year's record results. Planting acreage is forecast to stay almost in line with last year's.

Please Note: This report is to be read in conjunction with the Annual EU28 Consolidated Grain and Feed Report ([Grain and Feed Annual London EU-28 4-1-2016](#)) and provides further information on Estonian market of grain and feed.

General Information:

Area and production of grains

MY 2016/17

Estonian farmers can expect another good harvest in MY2016/17. At the end of February 2016 no winterkills were reported. As sudden winter weather attack with temperatures below 20 degrees of Celsius did not affect grain plantings as they were protected by enough snow cover. It is forecast that total grain production will diminish to 1.3 million MT, 15 percent lower than last year. The lower grain production forecast comes out from a more average level of yield expectations down from last year's record results. Planting acreage is forecast to stay almost in line with last year's.

MY 2015/16

In MY 2015/16 Estonia registered a record grain crop. It is estimated that grain production amounted to 1.54 million MT, a 25.6 percent increase over the previous year. MY2015/16 Estonian farmers' successes in grain production are due to bigger planted acreage, excellent weather and good varieties of grains which are frost resistant and adjusted to local conditions. The biggest share in total production was wheat (53 percent of total output) and barley (35 percent). They are followed by minor grains like oats, rye and mixed grains and triticale with 11 percent of share in production.

The average yield per hectare was 4.38 MT for all grain grains, whereas the average yield for wheat was 4.79 MT, for barley 4.24 MT and for rye 3.82 MT.

In MY2015/16, the sown area of grains was the largest in the last few years. Total acreage of grain plantings reached 0.35 million HA, over 5 percent more than in the previous year. The sown area of wheat amounted to 0.17 million HA, which was 10% more than in MY 2014/15. The sown area of barley increased by 4 percent and amounted to 0.13 million HA. The sown area of rye decreased by 7 percent and amounted to 0.014 million HA.

Area of grain sowings in Estonia in the years 2013 – 2016, (000) HA

Estonia	2013	2014	2015	2016*	Structure of sowings in 2015 (%)	Structure of sowings in 2016 (%)
Wheat	124	154	170	170	48.9	48.6
Rye	12	15	14	15	4.0	4.3
Mixed grains and triticale	7	9	9	9	2.6	2.6
Barley	133	126	131	130	37.6	37.1
Oats	35	27	24	26	6.9	7.4
Total	311	331	348	350	100.0	100.0

Source: Estonian Statistical Office

* FAS/Warsaw estimation and forecast

Production of grains in Estonia in the years 2013 – 2016, (000) Metric Tons

Estonia	2013	2014	2015	2016*	Structure of production in 2015 (%)	Structure of production in 2016 (%)
Wheat	407	616	813	690	53.0	53.0
Rye	22	50	55	48	3.6	3.7
Mixed grains and triticale	20	33	42	33	2.7	2.5
Barley	441	458	557	465	36.3	35.8
Oats	85	65	68	65	4.4	5.0
Total	975	1,222	1,535	1,301	100.0	100.0

Source: Estonian Statistical Office

* FAS/Warsaw estimation and forecast

Trade

Estonia is a net exporter of grains except for corn and triticale. For MY2015/16 total grain exports increased following the record crop and were estimated at 0.89 million MT. This is over 40 percent higher than in the previous year. Wheat's share in total exports exceeded 61 percent, and barley 32 percent. Small amounts of rye and oats are also exported. The share of out of EU countries has increased in the past few years significantly, but EU countries are still major buyers of Estonian grain with a share of 60 percent of Estonian exports for MY2014/15.

Imports by Estonia are very small. For MY 2011/16 they are estimated at 0.07 million MT. It is mostly hard wheat for pasta and other food use.

Grain Exports from Estonia, (000) MT

	MY 2013/14	MY 2014/15	MY 2015/16*
	Total exports	Total exports	Total exports
Wheat*	239	340	550
Rye	6	16	32
Corn	1	0	0
Barley	188	255	290
Mixed grains & triticale	0	0	0
Oats	36	24	22
Total	470	635	894

Source: Global Trade Atlas Eurostat

*Including wheat products

Grain Imports to Estonia, (000) MT

	MY 2013/14	MY 2014/15	MY 2015/16*
	Total imports	Total imports	Total imports

Wheat*	47	36	30
Rye	25	18	10
Corn	28	18	29
Barley	32	42	6
Mixed grains & triticale	2	1	1
Oats	1	1	1
Total	135	116	77

Source: Global Trade Atlas Eurostat

*Including wheat products

Wheat

Wheat Production, Trade, Consumption

Estonia	2013/14	2014/15	2015/16*	
Marketing Year Begin	July 2013	July 2014	July 2015	
Area	124	154	170	(000) HA
Production	407	616	813	(000) MT
MY Imports	47	36	30	(000) MT
MY Exports	239	340	550	(000) MT
Total Consumption	212	241	254	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Estonian Statistical Office

*FAS/Warsaw estimation and forecast

Wheat production for MY 2016/17 is forecast at 0.69 million MT, 15 percent lower in comparison with last year. The acreage of wheat plantings remains in line with last year's. Yields were calculated on the average results of past years. No winterkills were reported and plant health is assessed well.

In MY 2015/16 the total wheat production reached a record level and is estimated at 0.81 million MT. The quality of grain was very good. The record harvest increased Estonian wheat export potential. For MY2015/16 wheat exports are estimated at 0.55 million MT, 62 percent higher than the previous year. The main destination of sales used to be EU countries, and for MY2014/15 their share of total Estonian wheat exports exceeded 60 percent. Among out of EU countries, Kenya was the most important buyer taking a share of 30 percent of Estonian wheat sales. In the first quarter of MY 2015/16 Algeria replaced Kenya with a 56 percent share.

Wheat Exports to Estonia, (000) MT

Partner country	2012/13	2013/14	2014/15	2015/16 (July-Oct)
World	284	205	314	235
EU28	211	107	194	104
Kenya	0	0	95	0
Germany	31	1	85	7

Netherlands	0	7	26	7
Norway	45	23	24	0
Spain	0	20	17	8
France	0	0	14	23
Sweden	7	19	11	5
Latvia	21	23	10	2
Denmark	41	8	11	7
Algeria	27	0	0	132

Source: FAS/Warsaw, Global Trade Atlas

Wheat Imports to Estonia, (000) MT

Partner country	2012/13	2013/14	2014/15	2015/16 (July-Oct)
World	26	14	9	27.4
EU28	24	13	9	27.4
Latvia	20	8	8	27.0
Finland	0	0	1	0
Lithuania	3	1	1	0

Source: FAS/Warsaw, Global Trade Atlas

Barley

Barley Production, Trade, Consumption

Estonia	2013/14	2014/15	2015/16*	
Marketing Year Begin	July, 2013	July, 2014	July, 2015	
Area	133	126	131	(000) HA
Production	441	458	557	(000) MT
MY Imports	32	42	6	(000) MT
MY Exports	188	255	290	(000) MT
Total Consumption	241	260	261	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Estonian Statistical Office

*FAS/Warsaw estimation and forecast

It is forecast that in MY 2016/15 barley production will amount to 465,000 MT, 16 percent less than in the previous year. The acreage is forecast to stay in line with 2015/16 planting area, estimated at 130,000 HA. Production and acreage of barley vary greatly year by year, depending on the feed wheat market situation mostly. The record year for barley production was MY2015/16 with a crop of 557,000 MT and 131,000 HA acreage, both the highest in history. Barley consumption is oriented to feed use, industrial applications and on farm.

Oats

Oat Production, Trade, Consumption

Estonia	2013/14	2014/15	2015/16*	
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Marketing Year Begin	July 2013	July 2014	July 2015	
Area	35	27	24	(000) HA
Production	85	65	68	(000) MT
MY Imports	1	1	1	(000) MT
MY Exports	36	24	22	(000) MT
Total Consumption	53	51	48	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Estonian Statistical Office

*FAS/Warsaw estimation and forecast

Oat acreage has diminished in the last few years in Estonia, from 35,000 HA in MY2013/14 to 24,000 Ha in MY 2015/16. Oats are used for on farm feed consumption. In good harvest years production surpluses are sold mostly to Denmark, Spain and Latvia. In MY 2014/15 Estonia exported 24,000 MT of oats, almost all to EU countries. It is forecast that in 2016/17 oats production will amount to 65,000 MT, decreasing by 4 percent. Significant changes in domestic demand are not foreseen.

MY= Estonian local marketing year of July to June except for corn which follows on October to September calendar.

End of Report.