Limited Showers Over the Next 10 Day Improves Harvest Conditions for the East but Wettest Areas in S. NSW Likely Remain Slow; Favorable W. Harvest

**Australian Wheat/Canola**
- A few light showers lingered in S. NSW yesterday
- A few showers could skirt S. NSW on Thursday but overall drier pattern over the next 10 days aids slow recovery; rain uptick in the 11-15 day has low confidence and heaviest showers likely confined to areas east of the belt
- Limited W. Australia harvest interruptions
- Euro 16-30 day wetter than the CFS in the southeast and would hold onto/reintroduce delays

**Australian Cotton**
- Showers eased dryness over the weekend
- Drier pattern over the next 10 days but showers tick up again in the east for the 11-15 day

**Australian Sugarcane**
- Showers the past several days eased dryness across the belt; remaining stress limited to about 10% in the N. belt

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**Past Week Rainfall**

<table>
<thead>
<tr>
<th>Region</th>
<th>Past Day Amounts</th>
<th>Past Day Coverage</th>
<th>5-Day Fcst Amounts</th>
<th>5-Day Fcst Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia Wheat/Canola</td>
<td>.10 to .75”</td>
<td>10%</td>
<td>.10 to .75”</td>
<td>10%</td>
</tr>
<tr>
<td>Australia Cotton</td>
<td>Mainly Dry</td>
<td>Dry</td>
<td>.10 to .50”</td>
<td>&lt;10%</td>
</tr>
<tr>
<td>Australia Sugarcane</td>
<td>.25 to 1”, lcl 2”</td>
<td>45%</td>
<td>.10 to .50”</td>
<td>&lt;10%</td>
</tr>
</tbody>
</table>
Wetter Yangtze River Valley Trends Late Next Week Viable

North China Plain Wheat
- Up to 1/2 the belt should push into dormancy by the middle of December, eliminating moisture needs
- Shower potential did increase next Thu./Fri. in both the GFS and Euro forecast guidance; precip would boost soil moisture and aid slow growth in S. belt
- No winterkill risks at this time
- Latest Euro 16-30 day continues to favor a drier than normal pattern and the latest CFS shifted in that direction; moisture supplies would slip for the S. 1/4-1/2 of the belt that may not be dormant

China Rapeseed
- Increased chance for precipitation next week would improve moisture supplies to support growth as soil moisture levels have been falling in the N. 3/4
- Drier 16-30 day bears watching for minor stress development, particularly if rains next week fail

China Sugarcane
- Any harvest interruptions the next 2 weeks would be brief and non-damaging

China Rapeseed
- Mostly Dry
- Dry .10 to .25” <10%

China Wheat
- Mostly Dry
- Dry .10 to .25” <10%

China Sugarcane
- Mostly Dry
- Mostly Dry Dry
Spain/Morocco Rains Likely to Return Next Week Aiding Wheat

Europe

Wheat/Rapeseed:
- Showers favored N. Germany, W. Poland, and W. Romania yesterday
- Showers keep soil moisture abundant and should ease dryness in C. 1/3 of Spain next week
- Colder than normal pattern over next 2 weeks pushes wheat into dormancy; W. France and Spain still likely to stay mild enough for late growth but U.K. less well established

FSU

Winter Wheat:
- Showers favored S. Russia yesterday
- Showers taper off today but light showers still possible in most areas in next 10 days keeping wheat moisture favorable
- Unseasonably mild pattern still allows some unusually late growth in S. Ukraine/S. Russia next 2 weeks allowing crops to take advantage of recent rains
- No cold threats of note but colder conditions in the south will be needed later in the month to harden the crop for winter
- Snow cover still limited over next 2 weeks with more than 3/4 of wheat area vulnerable if a Siberian cold push ever comes

North Africa

Winter Wheat:
- Rains were confined to the far NE yesterday
- Showers are likely to return next week helping to sustain early development
- 16-30 day rains are more limited in Morocco which could hamper growth late month

<table>
<thead>
<tr>
<th>Region</th>
<th>Past 1 Day Amounts</th>
<th>Past 1 Day Coverage</th>
<th>5-Day Fcst Amounts</th>
<th>5-Day Fcst Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe Wheat</td>
<td>.25 to 1”</td>
<td>10%</td>
<td>.25 to 1”, lcl 2”</td>
<td>60%</td>
</tr>
<tr>
<td>FSU Wheat</td>
<td>.25 to 1”</td>
<td>35%</td>
<td>.25 to 1 ”, lcl 2”</td>
<td>25%</td>
</tr>
<tr>
<td>N. Africa Wheat</td>
<td>.10 to .50”</td>
<td>&lt;10%</td>
<td>.10 to .50”</td>
<td>&lt;10%</td>
</tr>
</tbody>
</table>
Showers yesterday eased remaining W. dryness

- Showers yesterday eased dryness and aided germination/early growth in the west
- Showers over the next few days and again in the 6-10 continue to aid growth across much of the belt
- Wetter 11-15 day trends focus across the S. belt
- Euro 16-30 day is drier than the CFS and could see dryness redevelop (west-focused)

<table>
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<tr>
<th>Region</th>
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<th>5-Day Fcst Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Africa Corn</td>
<td>.25 to 1”, lcl 1.5”</td>
<td>75%</td>
<td>.25 to 1.25”, lcl 2”</td>
<td>60%</td>
</tr>
</tbody>
</table>
Wetter Risks Remain to Arg. 11-15 Day Outlook on Much of Guidance

Brazilian 1st Crop Corn/Soy

- Rains continue to scatter across north next 2 weeks and aid crop growth; 16-30 day reverts drier in NE 15%, but limited concerns given abundant near-term moisture
- Moisture supplies slip in south 1/3 next 10 days (particularly Rio Grande do Sul), but 11-15 day shifting wetter late (16-30 day also wetter); rains will be important to limit stress, particularly in RGDS

Brazilian Coffee/Sugarcane

- Scattered rain in mainly N. & C. Minas Gerais/Espiritu Santo in past day; frequent rains next 2 weeks & 16-30 day, aiding much of coffee; Center-South sugar slips drier 6-15 day after near-term showers, but rains return 16-30 day

Argentine Corn/Soy/Wheat

- Two weak disturbances (Wed./early Thu. & Fri./early Sat.) bring only patchy and mostly light showers, with odds very low for extensive relief in most of driest C. & NW corn/soy areas; otherwise dry into early 11-15 day, with chance for widespread 90s°F (33 to 38°C) by end of 10-day (see Euro map above); heat moderates with shower chances that return later in 11-15 day
- Most models much wetter 11-15 day than our forecast and pose wetter risk, but our forecast shifted only slightly wetter given recent wet model biases; S. Santa Fe/Entre Rios/N. Buenos Aires (40% corn/soy) at most risk for expanding stress, particularly to early pollinating corn
- 16-30 day rains still limited in central/east corn/soy, with ~1/2 of belt at risk for moisture stress; heat more likely early in period to stress early pollinating corn but moderates again late
- Wheat harvest interruptions minor from showers rest of this week & 11-15 day

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