

## Global Grains Take Massive 14% Hit, Where Will Our Food Come From?



Rosy USDA forecast for Argentina snubbed yet again. Private analysts are reporting below 19 million for the wheat crop, around 18.3 - 18.5 million tons, but the USDA is producing a higher yield report of around 21 million tons. Argentina is the world's 5<sup>th</sup> largest wheat exporter after Russia, EU, Canada and Ukraine, but since their fields have been affected by frost and hail, with crop yields coming in at 3 year lows.



### Analysts eye sub-19m mt Argentina wheat crop on dry weather

16 Oct 2019 | Andy Allan

Private analysts are **cutting their expectations of Argentina's wheat crop this year** to below 19 million mt, and in some cases 18 million mt, as adverse weather is set to hit yields.

The country, which is the world's fifth largest wheat exporter after Russia, the EU, Canada and the Ukraine, had earlier this year been expected to produce 21 million mt, **but frost and hail will hit yields in areas that had not suffered before.**

And one trading house said that it expects output could fall as low as 18.2 million mt due to the weather - that would mark the **lowest crop for three years.**

Argentina on this map and below it sits Antarctica. Notice the recent strange storm systems pounding New Zealand, Australia, and now, Argentina with out of season cold. Perhaps this is the reason why their yields have decreased.



Another rosy forecast from the USDA for Brazil was slashed by 3 million tons. Even Conab, Brazil's own food statistics agency cut the legs off the USDA's forecast, asking them where they got those numbers from. *AgRural* reported that only 3.1% of the crop is in the ground, which is about half of the typical amount that is planted at this time. So, there are lots of disputing these USDA figures.



## ANALYSIS: North and South America soybean crops face weather challenge

11 Oct 2019 | Andy Allan

### South America

Meanwhile, in Brazil arid soil conditions have meant that farmers there have got off to the slowest sowing start in six years.

On Thursday, the USDA kept its own estimate for the world's biggest exporting nations steady at 123 million mt.

But what is notable is that figure is around **3 million mt higher than estimates by Brazil's own food statistics agency Conab.**

According to consultants AgRural just 3.1% of the crop is in the ground – **around half the typical sowing rates.**



This is why, in my opinion, the USDA now is nothing more than a market stabilizer. They are not providing any truth about crop yields on the ground, or else these massive 2019 declines in the expected output in the United States and Canada would have been seen in their reports.

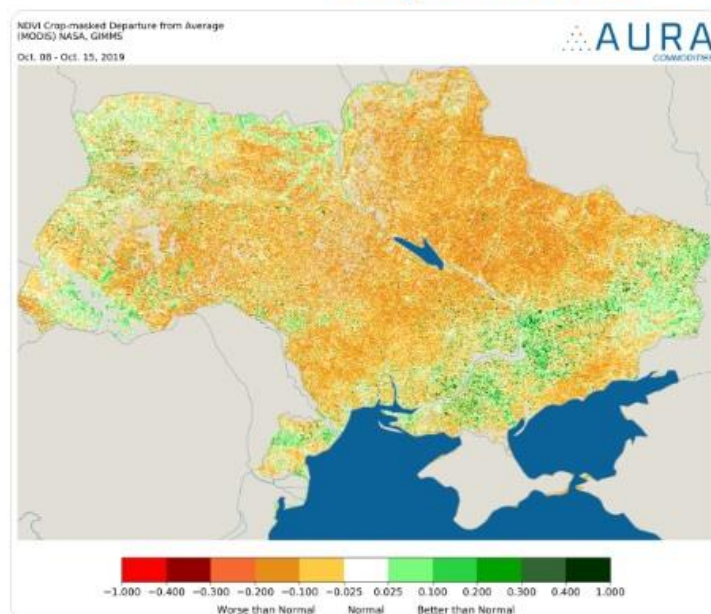


As wheat was mentioned in the previous article, let's visit Ukraine and look at their planting at the moment. Sadly, the low moisture availability for the soil is, surely, not a great news for farmers planting winter crops.

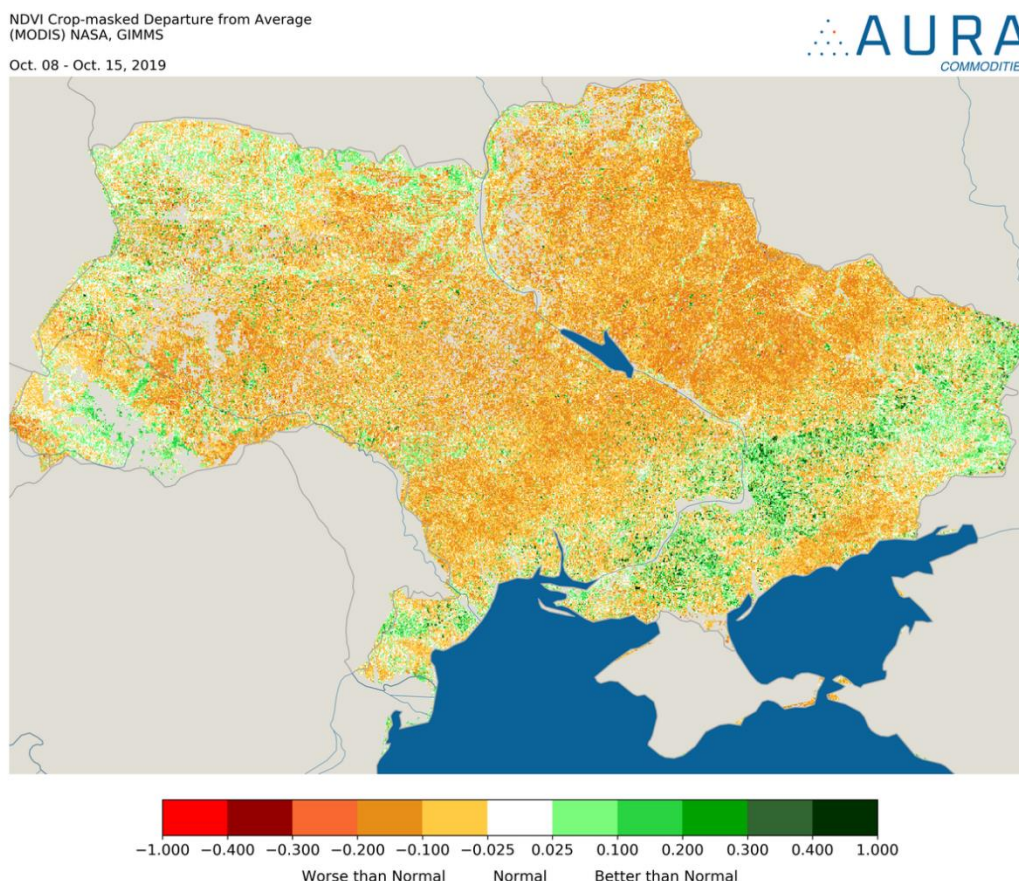
 **Aura Commodities**  
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Ukraine: Latest NDVI Anomaly shows worse than normal conditions across large proportion of the country. Low moisture availability in the soil not great news for farmers planting Winter crops #wheat.

Further discussion at [ow.ly/6lEb50wNzk2](https://ow.ly/6lEb50wNzk2)



Orange areas on the map have drier weather, with green regions having average or normal moisture. Will this be a one-year planting event? We have to wait and see as we move through 2019-2020, but in the “Czech Lands” which are usually experience a mega-drought every Grand Solar Minimum, is just north of this location. So, this may be a historical cycle repeating.



Back to Argentina, *agriCensus* reported that internal wheat consumption forecast at 6 million tons this year. This is the wildcard, because regardless of what the USDA’s report of 21 million tons says, harvests will be below 18 million tons, and this equates to less exports for the world. So where are other countries going to get their grain from to offset Argentinian declines? Like what I’ve said before, you cannot print food. It has to be grown, or not.

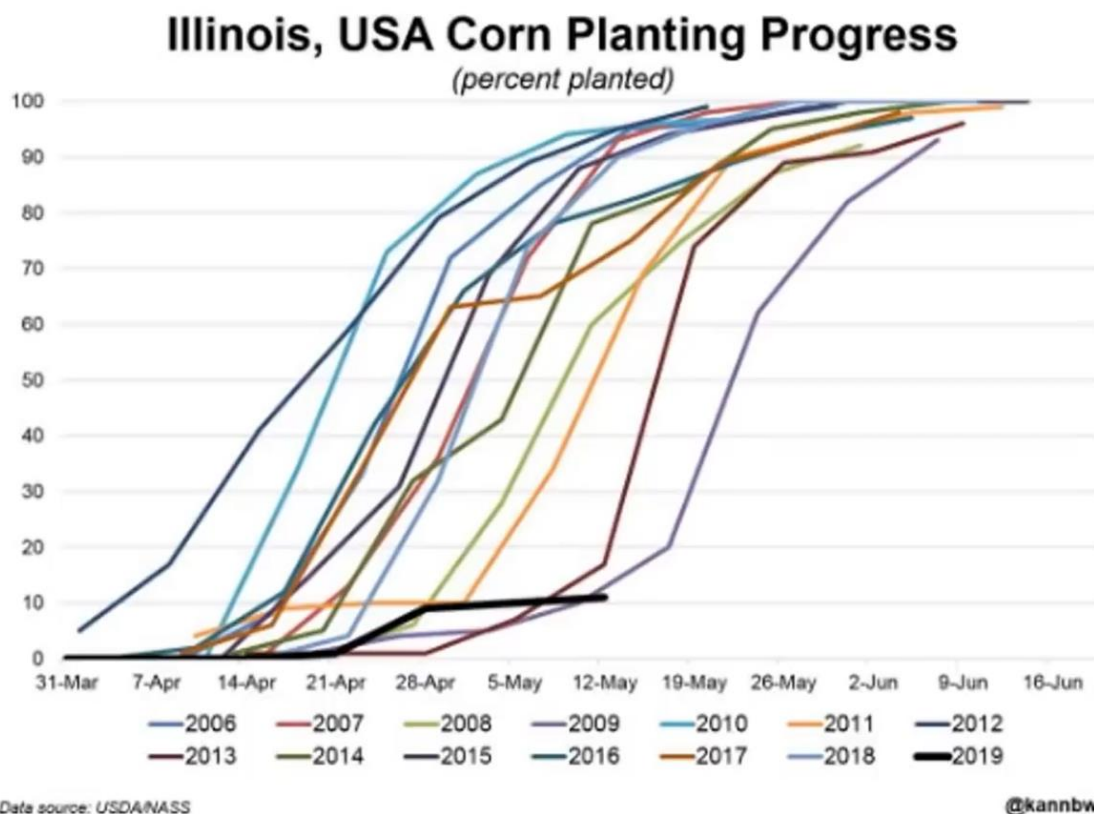


### Analysts eye sub-19m mt Argentina wheat crop on dry weather

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Argentina is expected to use 6 million mt of wheat in the current marketing year, meaning any decrease in production will likely come from forecasted exports, which the USDA estimates at 14.5 million mt on a crop of 20.5 million mt.

Each country will, certainly, utilize internally what is needed, and only sell the excess. If you look around, every country seems to be decreasing exports. This means prices should start rising, so should inflation.



Anyway, this is another drop the ball forecast from the USDA, they will have to slash global ending stocks to 4-year lows. Let me remind you that at the beginning of 2019 they reported that the yields were going to be rosy, and this year would be the highest yield ever, increasing by 2%. So how did that suddenly drop?



#### ANALYSIS: North and South America soybean crops face weather challenge

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But in just five months the USDA's estimate of global ending stocks has fallen from an initial estimate of 113 million mt in May to just **95 million mt in October- a chunky 14%**.



USDA admitting that these storms are going to wipe out another 2% from the US supply, but private forecasters believed that it is going to be a much, much higher number.



## ANALYSIS: North and South America soybean crops face weather challenge

11 Oct 2019 | Andy Allan

On Thursday, the USDA released its latest forecast for this year's soybean crops, with cuts to US ending stocks filtering through to the global picture to **hammer the world carryout figure next year to a four-year low.**

Key growing regions in the US are facing snow and freezing temperatures that could further plague a crop that has already **suffered from floods in May** - the ideal planting season.

If that scenario plays out, it could **wipe a further 2 million mt, or 2%, off US supply.**

One of most laughable reports from USDA forecasts: "The United States is only declining in grain production by only 4%." Even with the largest floods ever recorded in the USA with the most acres ever claiming "No Plant Insurance"

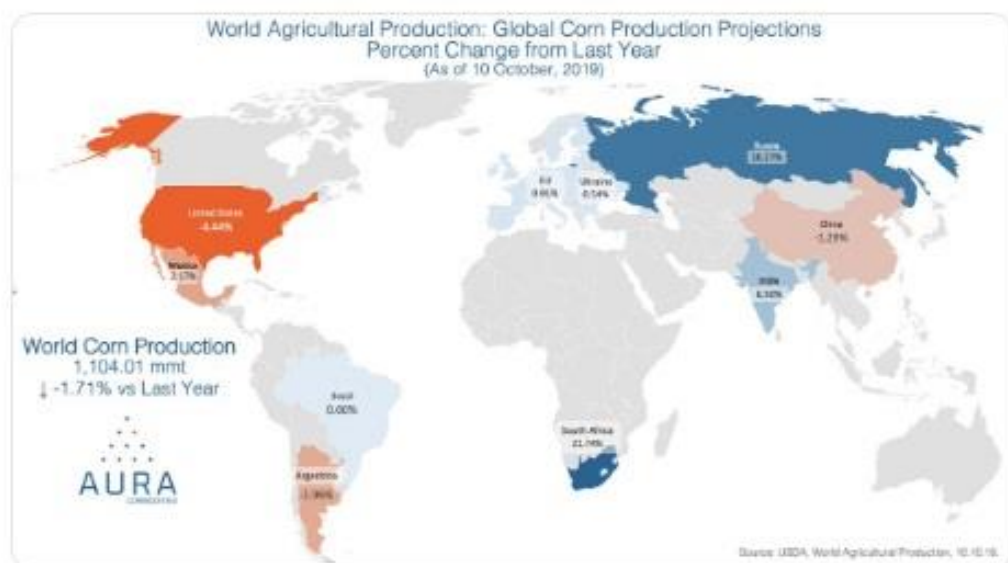


**Aura Commodities** @AuraCommodities · 5h

Oct. 10th #USDA World Agricultural Production - #Corn

Estimates were down -0.08% from September, bringing Global Corn down to -1.71% YoY.

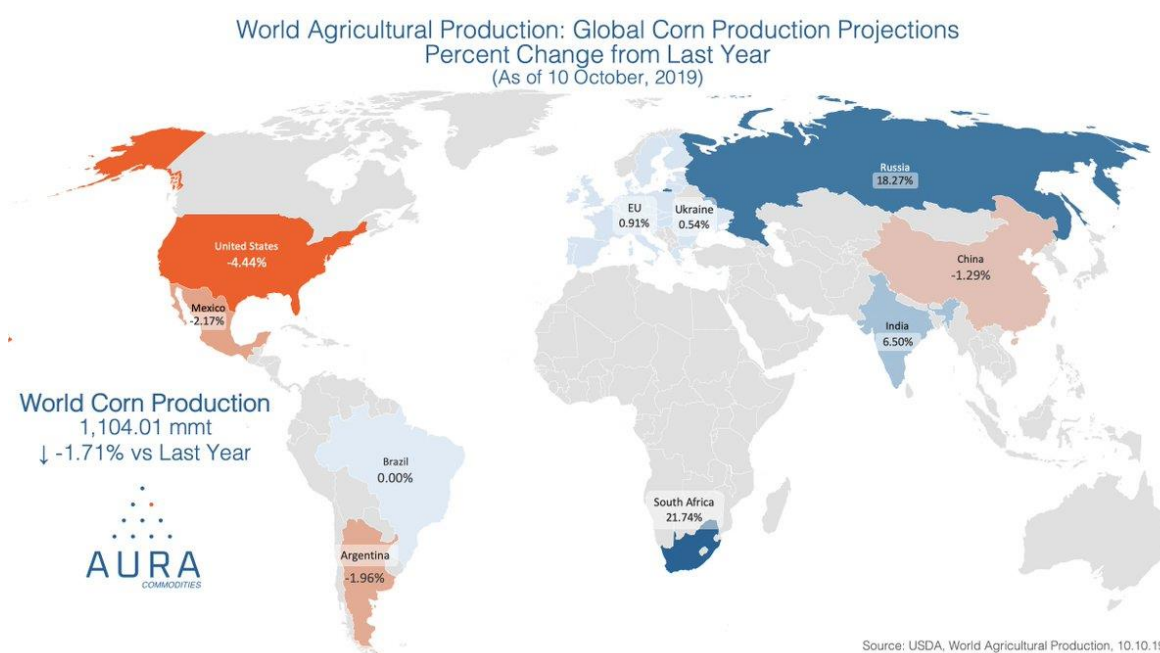
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In reality, there was a 40% decline for corn alone, 15% decline, at the minimum, for soy beans, and 4-5% decline for wheat. So how is the entire grain output from the United States is only falling by 4%? Where is the USDA getting their numbers from? Did they somehow forget a zero on that report?

Also, China state-run media is calling a 30% decline in corn production due to armyworms that devastated their crops during the spring, and now the outbreak of fall armyworms. Yet the USDA is reporting not even a 2% loss. There is a vast disconnect between the statements of state-run media in China and the USDA.

I am, however, not sure of how this works because they are asserting that Brazil is at just a tenth of a percent increase, but Brazilian crop forecasting agency, Conab, put a significantly larger loss than that. So there is a huge disconnect between what is being reported through the USDA and what on-the-ground reports are from individual nations. This is laughable, and nothing more than a market stabilization mechanism, or fraud, or both.



China experiencing massive crop losses in corn, wheat, fruit, vegetables, as well as pork. This is one reason why China is exempting US pork, soybeans, and other farm goods from additional trade war duties.

So it comes down to where our food is going to come from?

China understands that it needs more food for its people; and from an article I have just read, China's CPI has had 6-year highs with runaway, non-stop projected inflation on food up to now in October, making China's food inflation for the year 50%. It is, somehow, evident that this trade war is nothing more than smoke and mirrors, and they are incredibly dependent on US imports for food.

 **South China Morning Post** 13 Sep, 2019

## China to exempt US pork and soybeans from additional trade war duties, in response to Trump's tariff delay



China has announced that it will **exclude imports of US soybeans, pork and other farm goods** from additional trade war tariffs, opening the door for significant purchases of agricultural products.

Speaking of crop losses, Australia with unusual weather affecting their crop production as well, but the headlines are even more bizarre: "Polar pulse in Southeast could lead to thunder snow." This is what most of the forecasts are calling it for, "thunder snow". This is an extremely rare event.



OCTOBER 16, 2019

## Polar pulse in south east could lead to thundersnow

The end of the week will see a bizarre contrast in weather with maximum temperatures 40C lower in Victoria than some parts of Queensland due to a vicious cold front.

Australia will be split in two weather wise, with near record temperatures in the north but conditions so cold and angry in the south there's a **risk of thundersnow** later this week.

**A pulse of polar will sweep across Victoria and Tasmania** at the same time as elevated fore danger in northern Australia and a possible severe tropical storm that could rock through south east Queensland.



The risk of thunder snow is enough to scare people so Aussie media is tiptoeing around it. A phrase in the article says, “A pulse of polar will sweep across Victoria and Tasmania...” Does this mean a pulse of possibly record-breaking cold temperatures and an Antarctic front that should not be there, because it is so far into spring that is unheard of?

The article continues, “A cold front will drop temperatures...” This a disguised truth, because it is possibly an Antarctic all-time record cold front that will drop temperatures. Then the following statement mentioned record highs.



## Polar pulse in south east could lead to thundersnow



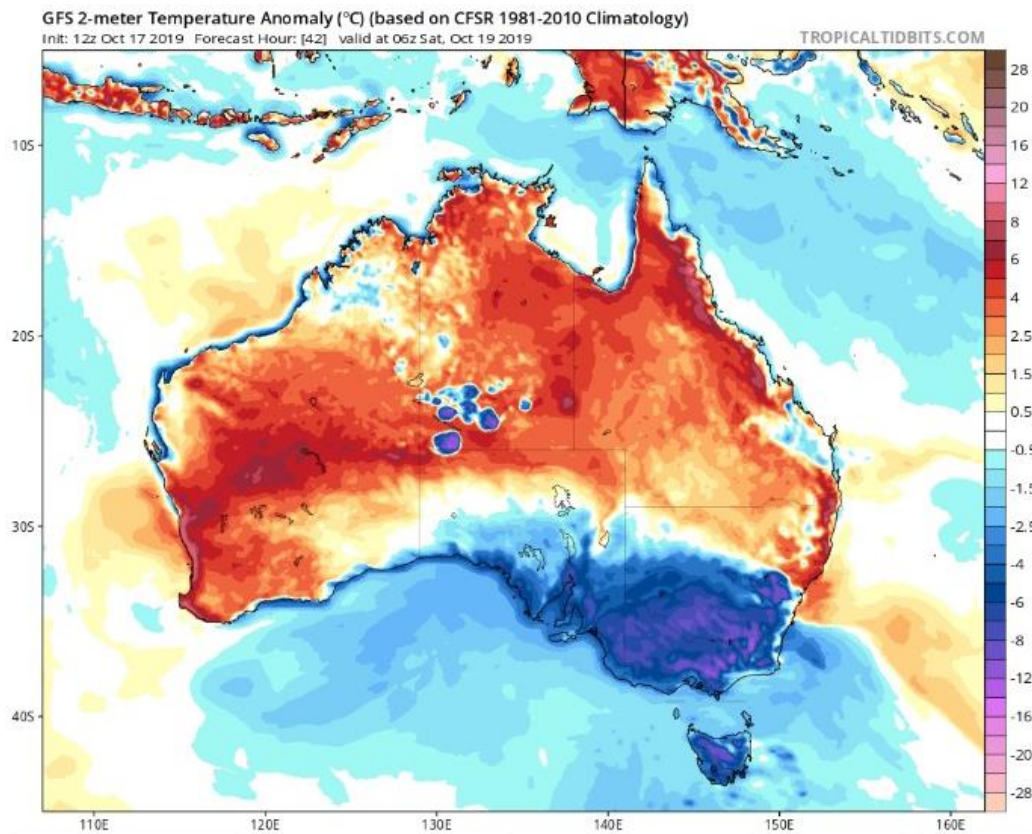
“A cold front will drop temperatures across southern Australia for the next 24 hours,” [Sky News Weather channel](#) meteorologist Tom Saunders said.

“[But north of that front, we have near record high temperatures](#) and elevated fire dangers through central northern and some eastern parts of the country.”

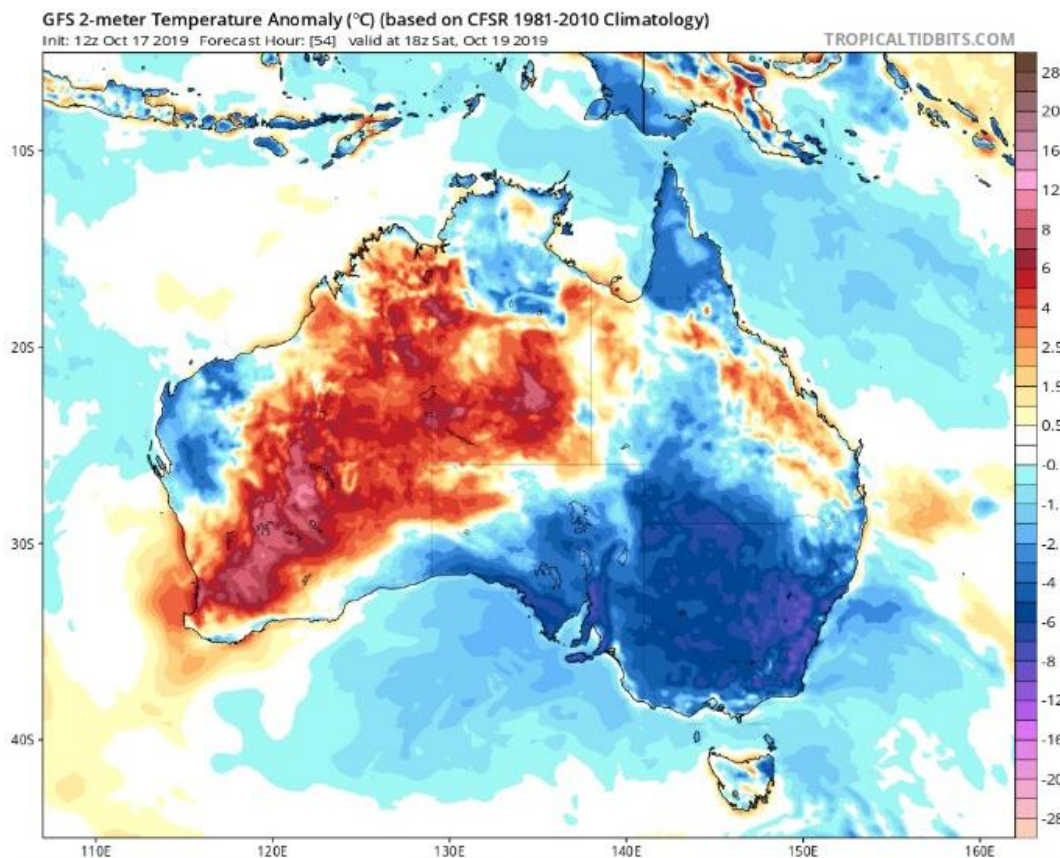
“Because of that cold polar air there will be thunder and hail on the Alps and even thundersnow is possible, [that’s thunderstorm that produces snow,](#)” Mr Saunders said.

This has become the trend in many news articles nowadays. It has to somehow, mention heat and tiptoe around anything that has to do with cold. Cold polar air, thunder and hail on the Alps is called ‘thunder snow’.

This time, however, there is no tiptoeing around the event, temperatures are going to drop as this front sweep over S. Australia, in the next few days.



Next week arrival of another one of these fronts from Antarctica.





Then finally, at the bottom of the article, the contrast and the difference between maximum temperatures in parts of Queensland and Victoria is so strong, which could be as much as 40 degrees. On Thursday in Western Queensland, temperatures are likely to top out at 39°C; and then in the Victorian Alps it is freezing at -1°C or 30°F, which is a 40-degree difference.



OCTOBER 16, 2019

## Polar pulse in south east could lead to thundersnow



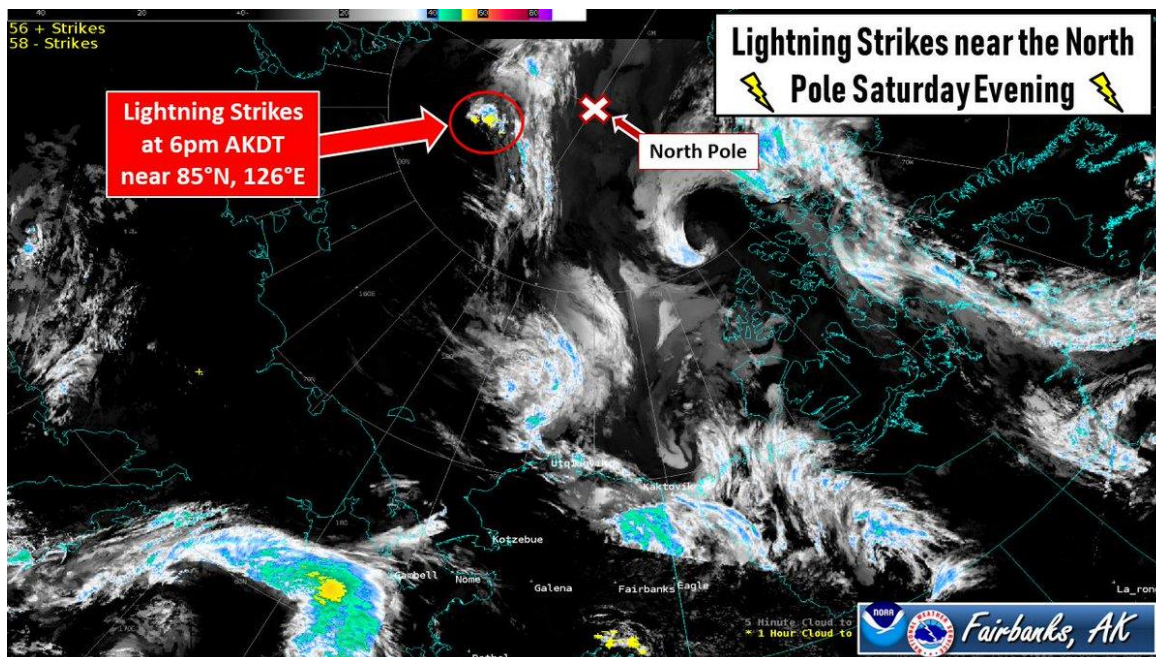
The contrast is so strong, the difference between maximum temperatures in parts of Queensland and Victoria **could be as much as 40 degrees.**

On Thursday, Cloncurry in western Queensland will likely top out at 39C, yet Mt Hotham in the Victorian Alps will peak at a more than freezing -1C.

If you did not read the article, word for word, you would be very confused by the way the information was presented and arranged. I bet they hope for you to just skim-read it and then get bored as you read through those repeated record heats, and paragraphs talking about Northern Queensland and other parts of Australia before they actually talk about the cold front, which is the article's headline. That is, clearly, a narrative building at its best.

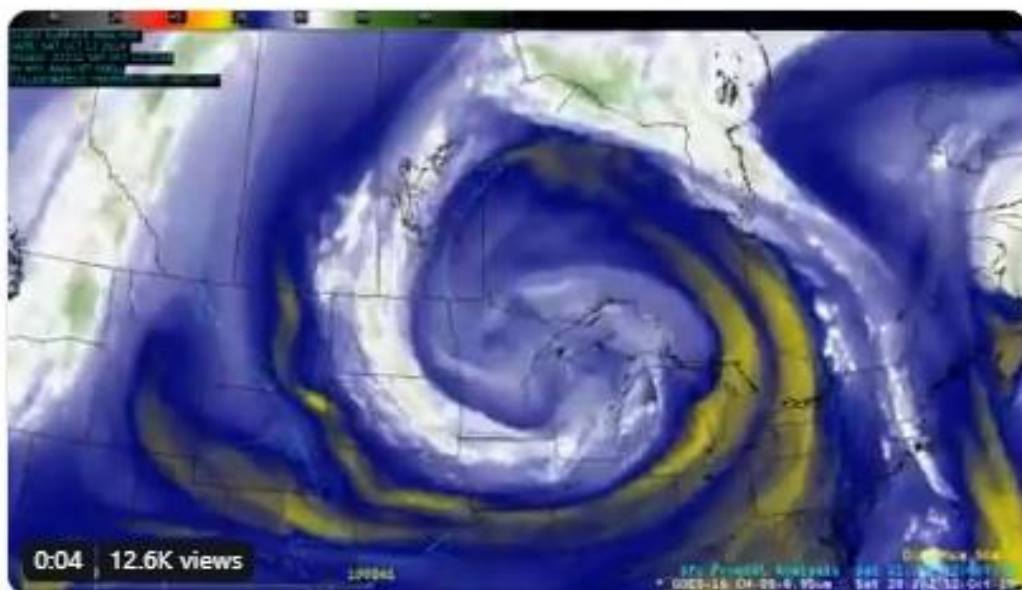


Speaking of unusual polar events, back in August 2019 there were lightning strikes near the North Pole, which is categorized as extremely rare. So, it looks like both polar regions are showing extremes in electrical phenomenon and wind patterns because of how the jet streams move into new positions as the magnetosphere weakens.



Case in point, Arctic front in the United States destroying crops yet again. This did not just destroy the crops but pummeled them. Freezing temperatures have stopped the growing of crops for this year.

 **Scott Bachmeier** @CIMSS\_Satellite · Oct 12  
#GOES16 Water Vapor imagery shows that the size of the middle-tropospheric circulation associated with the midlatitude cyclone (that produced up to 30 inches of snowfall and blizzard conditions in #NDwx) remains impressive;  
[go.wisc.edu/773i0v](http://go.wisc.edu/773i0v)

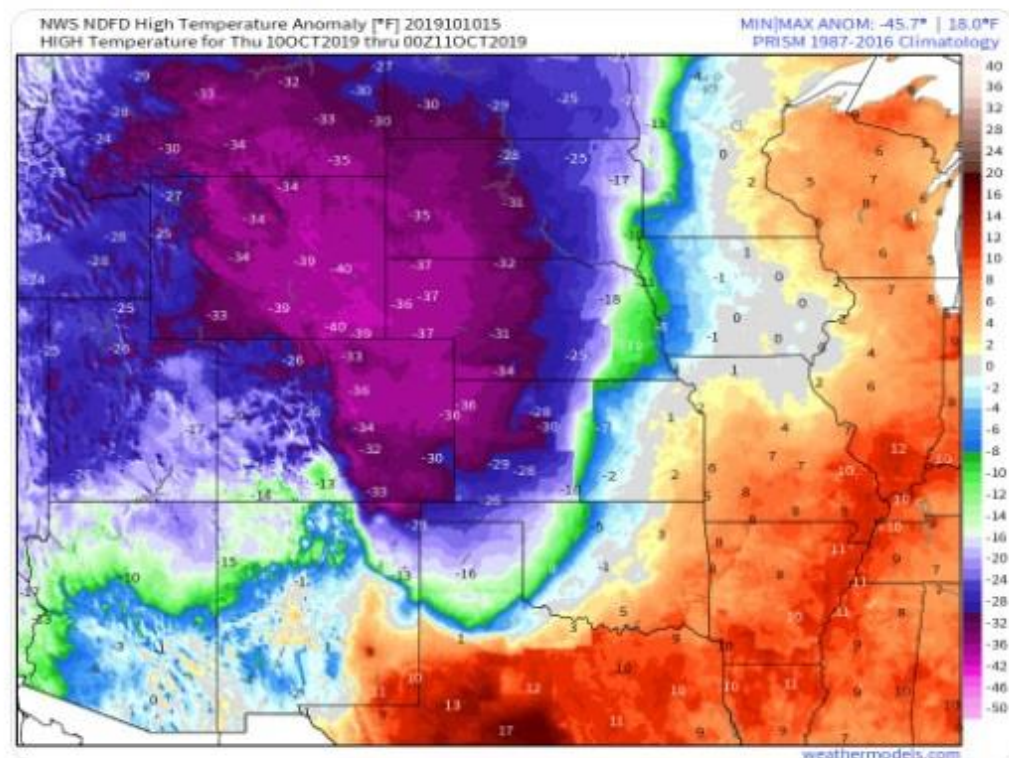


Cyclical patterns are one thing, but actual ground temperatures of 40°F below normal can cease agricultural production or growth. So, once temps hit that freezing point in a majority of the growing zones, any plants there will cease growing. It won't kill them back to zero, but they will stop growing. They will no longer fill the kernels with starch from the stem because that process has ended. Thus, whatever is in the fields at present should be harvested, but since the planting season was 2-months late, some of these corn ears are still in the dawning stage. They are not yet ready to harvest, so it is going to be animal fodder at best, or silage at worst.



**Ryan Maue** @RyanMaue · Oct 10

Unseasonably cold and snowy across the Mountain West into the Plains. Temperatures 30-40°F below normal this afternoon -- with actual values remaining below freezing.

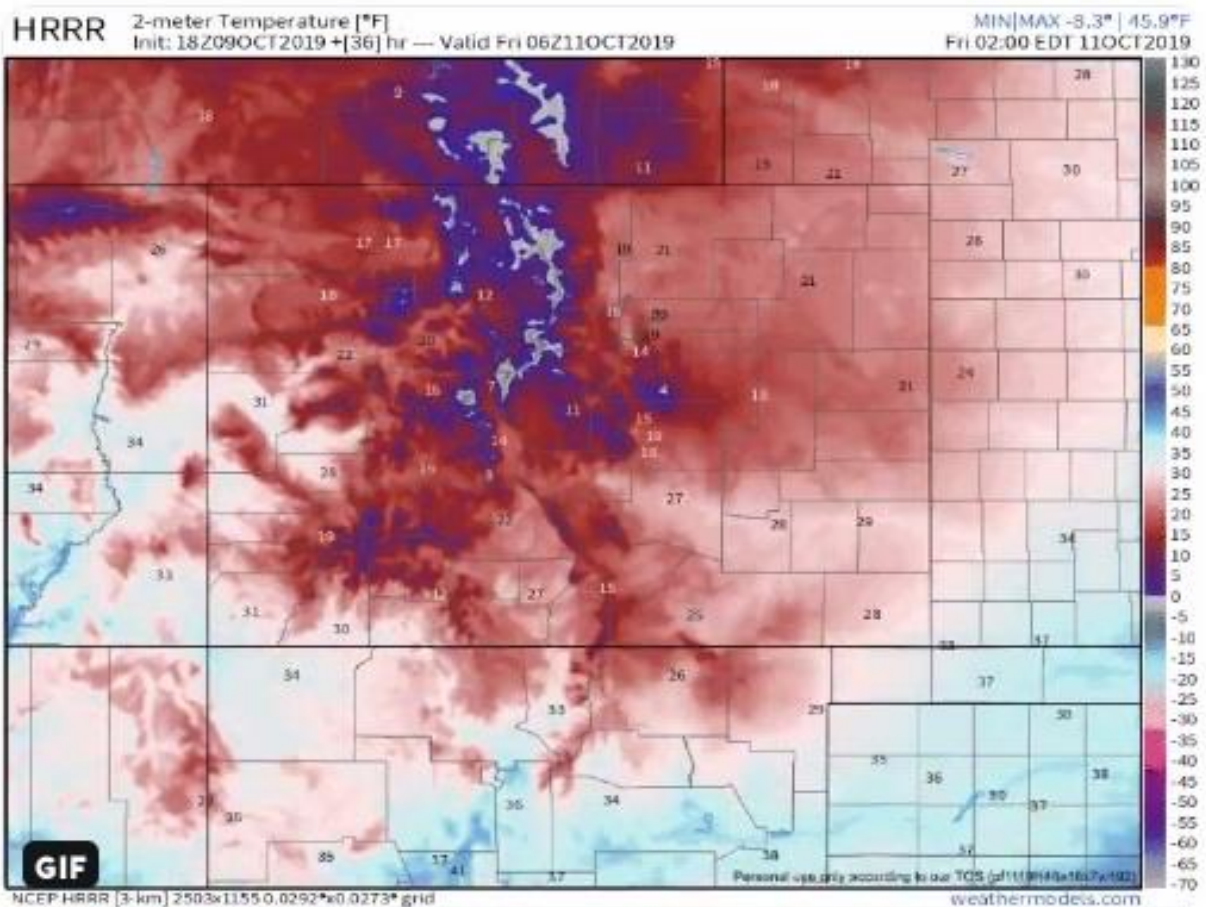


weathermodels.com



As a consequence, the USDA is going to have to drastically downgrade their figures, and when we look at places like Denver, as shown on this chart. Those are the coldest temperatures since the late 1800s, and the most ferocious temperature drops ever recorded.

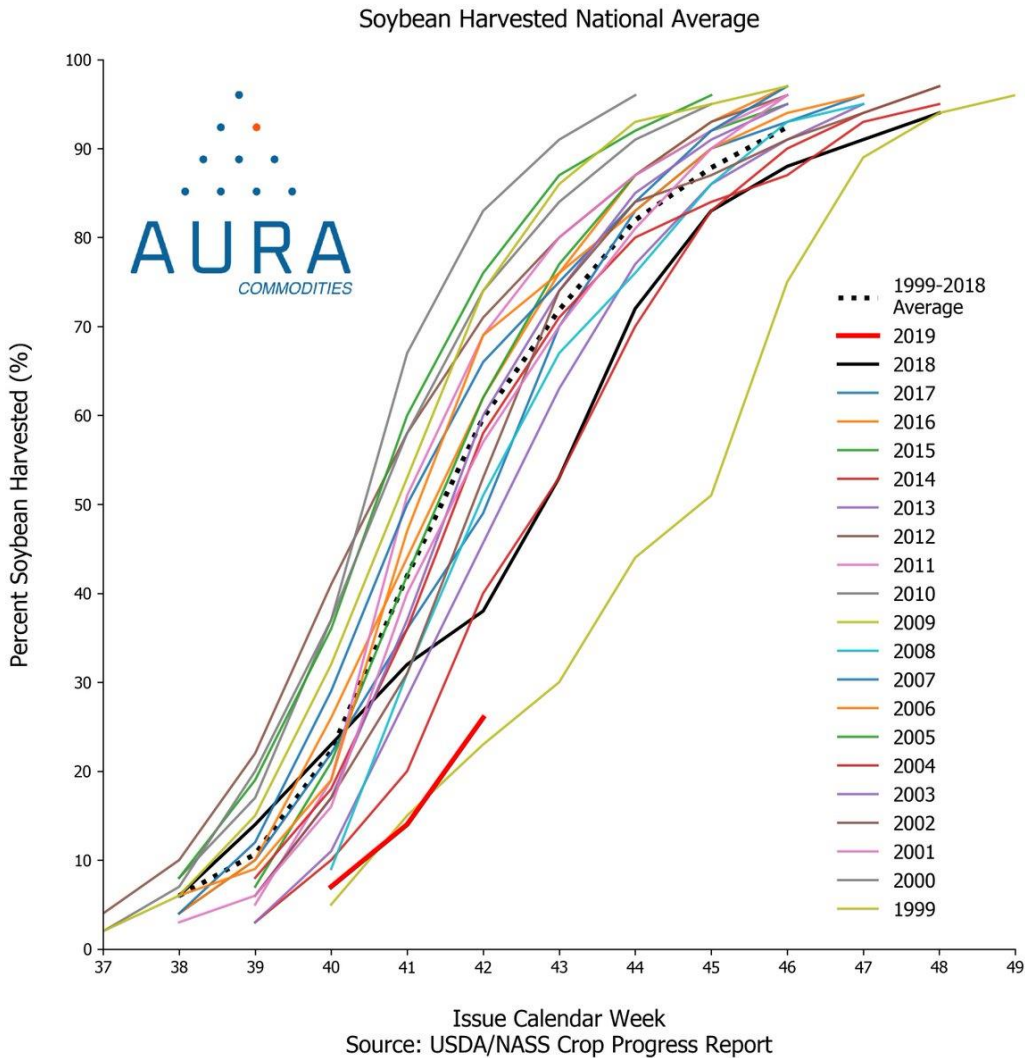
Yet somehow, the media reported this as if it was just a little cold front that kind of moved through. On top of this, there are hundreds of cold and snow records that were smashed just a few weeks after summer, but seem to be unimportant for the corporate media machine, and are still insisting there is abundant heat or something.



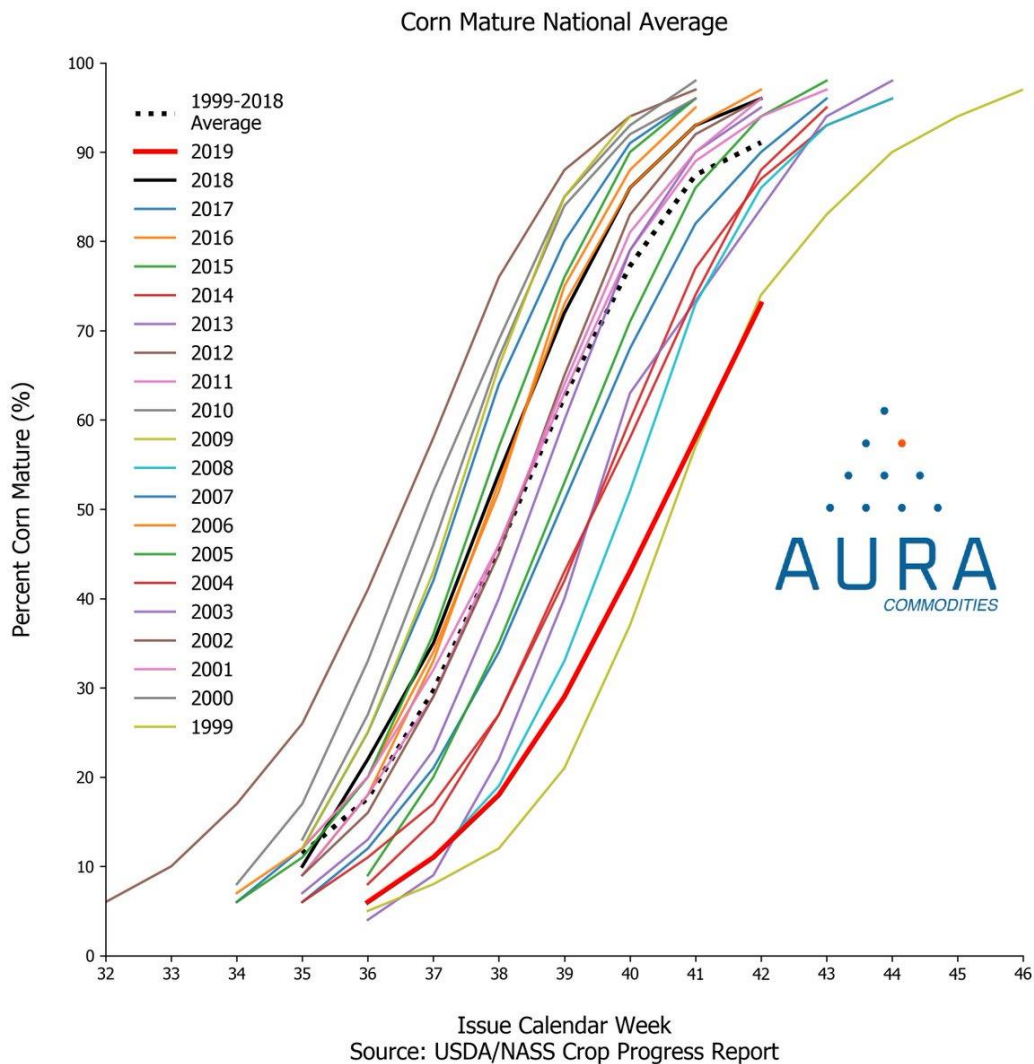
But whatever it is, it is still about our food sources. Are we going to be able to grow this year? What about next year? For sure, food is going to be way more expensive by 2021 when the true crop losses mount and we won't be able to grow enough to feed the planet.



Where is our food going to come from? Harvested soy beans is represented by the red line at the very bottom of this chart, which is almost indiscernible. That is where we are harvest season 2019, because there are so many acres that are under snow from that last blizzard that has just passed through that these stranded crops, now booked as “yield” by the USDA will have to wait until spring 2020 to be “harvested”.

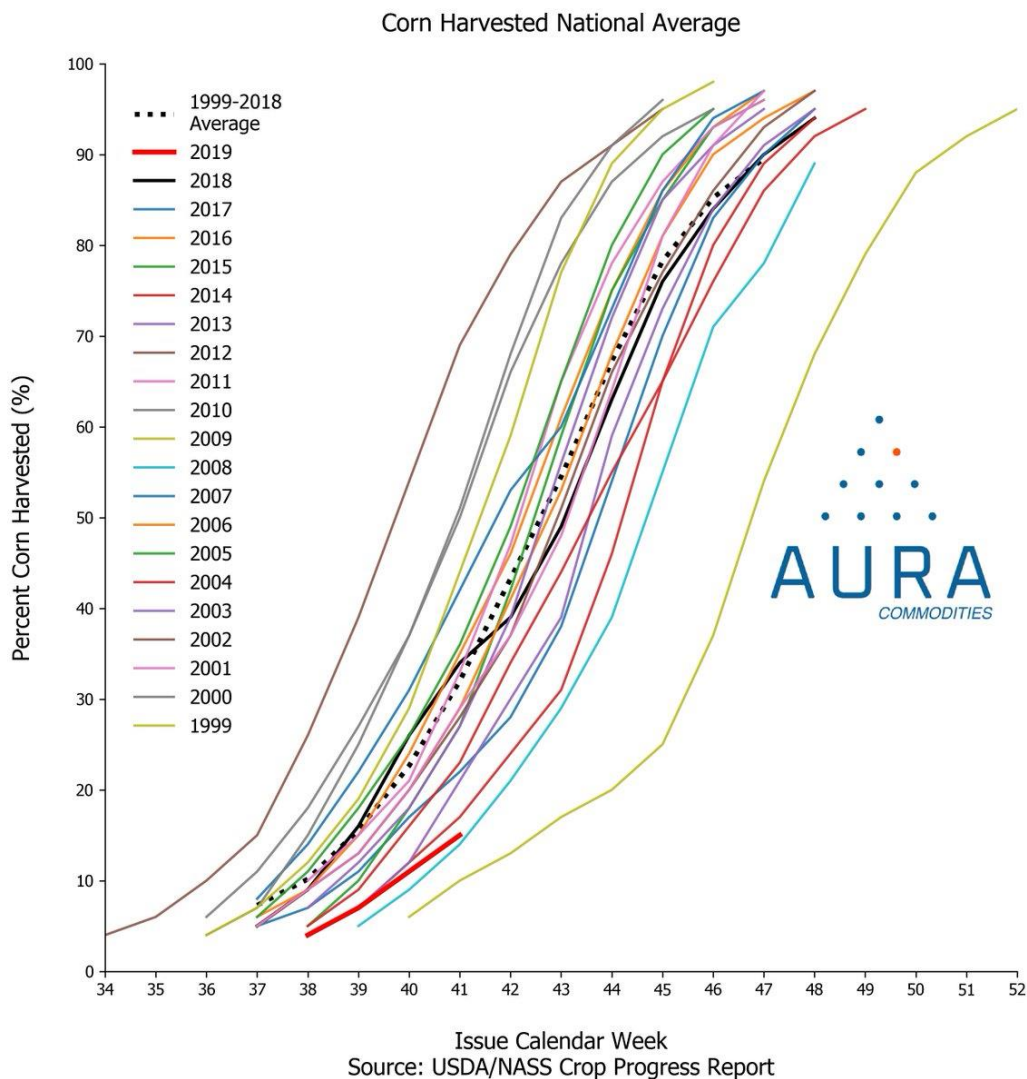


As for corn maturity level, where it stops concludes corn production for the year. There might be a few areas further south with better productions, but generally, where that blizzard passed over has its growing done for the year.



This brings us right to the bottom red line again, which is nearly indiscernible as well, 2109 corn harvests for the United States. So why is the USDA not telling us this? Why are they continuously putting out fictitious numbers, with no warning to you or the general public about the food prices that are about to skyrocket?

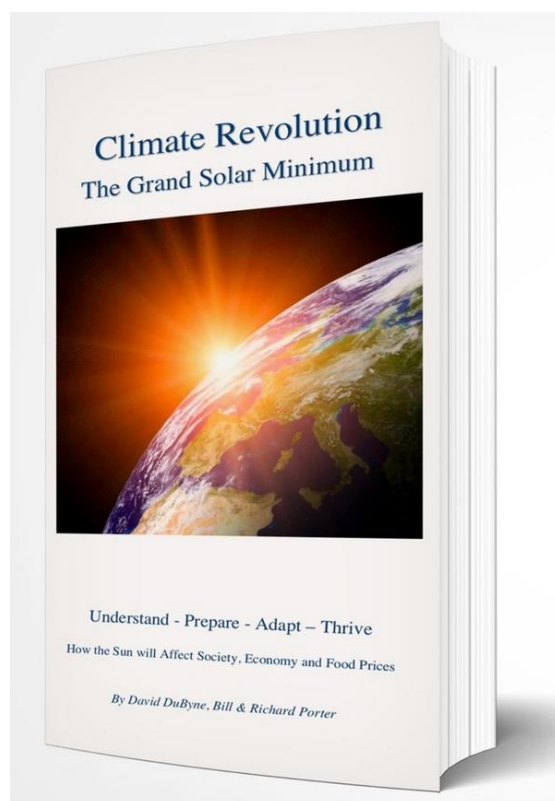
Why this information being masked in plain sight baffles me.





So, if you want to know where the crop zones are going to continue to go offline with forecasts out to 2028 and what we can expect with the food prices, *Climate Revolution: The Grand Solar Minimum*, is a good source.

The Climate Revolution e-book is a 'Must Read' for understanding our Sun driven climate as we progress deeper into the new Eddy Grand Solar Minimum. Weather extremes leading to Global food scarcity and high food prices are here now, and this book describes the expected changes, how to survive & thrive during future challenging times with practical preparations. <https://payhip.com/b/3sVi>



Thanks for reading, I hope you got something out of the article. If you like more content like this, I produce the tri-weekly Mini Ice Age Conversations podcast of 30-minute in-depth analysis on the GSM you can take on the go through out your day.

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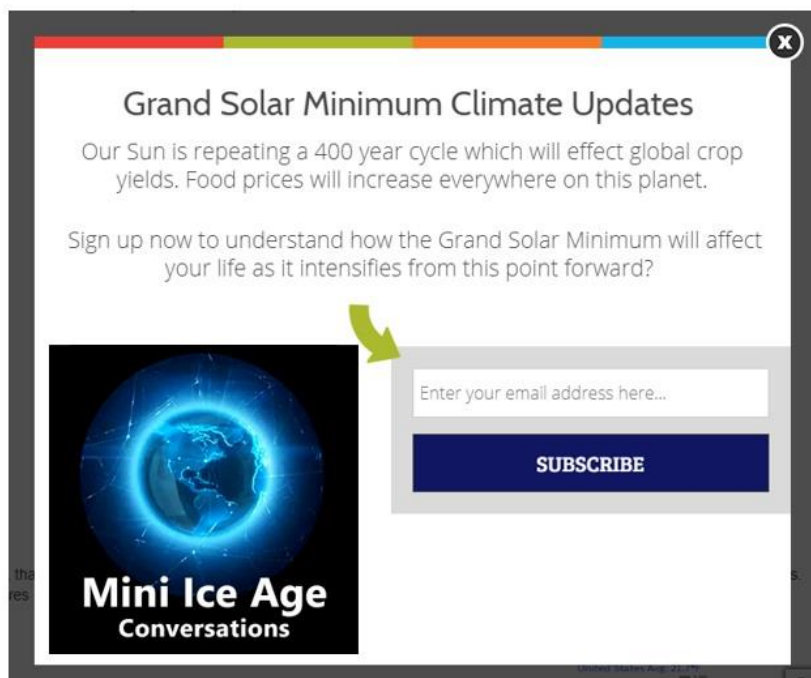
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China to exempt US pork and soybeans from additional trade war duties

<https://www.scmp.com/economy/china-economy/article/3027163/china-exempt-us-pork-and-soybeans-additional-trade-war>

ANALYSIS: North and South America soybean crops face weather challenge

<https://www.agricensus.com/Article/ANALYSIS-North-and-South-America-soybean-crops-face-weather-challenge-8891.html>

Analysts eye sub-19m mt Argentina wheat crop on dry weather

<https://www.agricensus.com/Article/Analysts-eye-sub-19m-mt-Argentina-wheat-crop-on-dry-weather-8955.html>

Lightning near the north pole very rare

<https://pbs.twimg.com/media/EBwE4L0WkAAVph5.jpg>

<https://watchers.news/2019/08/15/lightning-strikes-north-pole-august-2019/>

Polar Pulse and Thunder snow in Australia Extremely Rare

<https://www.news.com.au/technology/environment/polar-pulse-in-south-east-could-lead-to-thundersnow/news-story/2d6811d0dba6323c4fc454f89a6ab5b7>

<https://www.theguardian.com/australia-news/2019/oct/17/extreme-weather-thundersnow-expected-in-victoria-as-queensland-hit-by-heatwave>

Australia thundersnow temperature maps

<https://www.tropicaltidbits.com/analysis/models/?model=gfs&region=aus&pkg=T2ma&runtime=2019101712&fh=-12>

Corn production levels 2018 vs 2019

<https://pbs.twimg.com/media/EHFV6KmWwAEnlpp.jpg>

Ukraine soil moisture levels for planting

<https://pbs.twimg.com/media/EHFr5lYXYAAaRGA.png>

Crop conditions globally

<https://twitter.com/AuraCommodities>

USA Crop maturity far behind averages

<https://pbs.twimg.com/media/EG8ohBeW4AQGn7i.jpg>



USA Soybeans harvested way below normal

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USA Corn Harvested way below normal

<https://pbs.twimg.com/media/EG315WFX0AALtdK.jpg>

Rosy unattainable forecasts from the USDA

<https://pbs.twimg.com/media/EGh9MZ1XoAEcpiQ.jpg>

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