

# Cereals, Oilseeds and Protein Crops

## Market Situation

**CROPS Market Observatory**  
**5 July 2019**



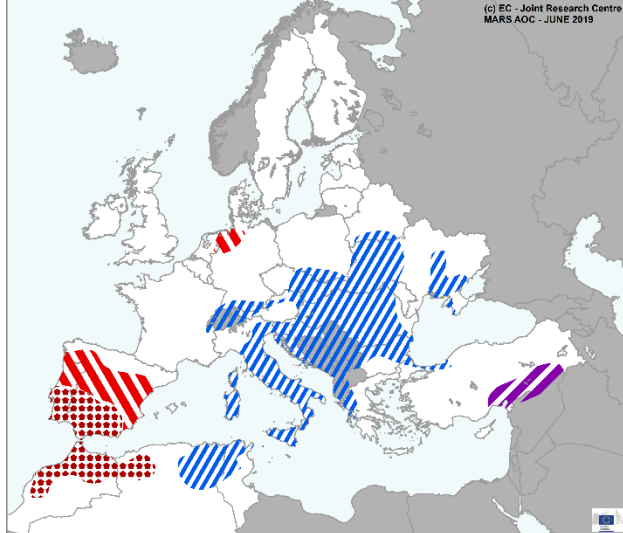
# Agro-weather conditions



# Areas of Concern – May - beginning June

## AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 May 2019 until 21 June 2019

(c) EC - Joint Research Centre  
MARS AOC - JUNE 2019



 Rain deficit  
 Rain surplus

 Drought  
 Heat wave

- **Dry conditions / drought**

- Iberian Peninsula
- Yields potentials impacted; concerns about water reservoirs levels

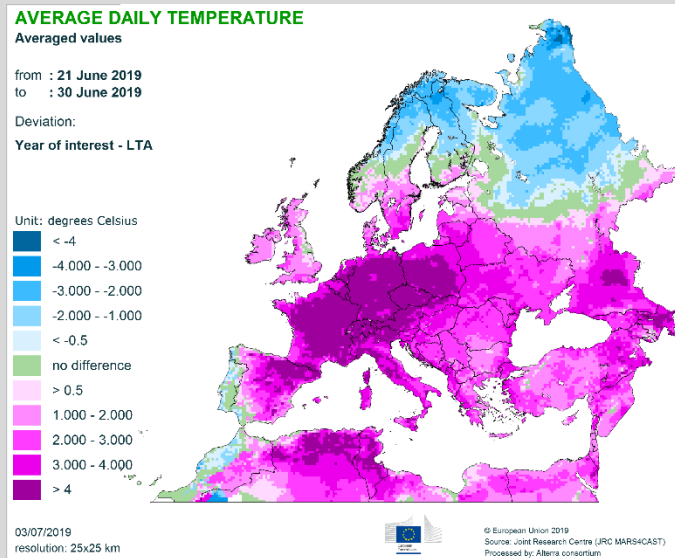
- **Rain deficit**

- North-western DE, eastern NL
- Soil water levels below average, rain needed

- **Rain surplus**

- IT, parts of southern-central and south-eastern Europe
- Soil moisture improved, but rain and cold hampered summer crops growth (IT, HR, AT, SK, HU, RO)

# Heatwave



- **hottest in records**

- June 2019 among the hottest
- Last week of June the hottest in large parts of western, central and southern Europe

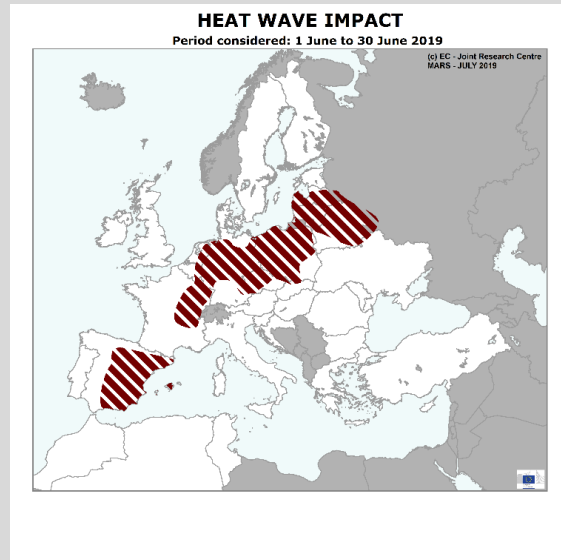
- **exceeding 35°C in many parts**

- In areas in which such temperatures are not normal: large parts of FR, DE, PL, northern IT

- **not reaching...**

- IE, UK, PT, northern FI and SE

# Heatwave



- **yield impacts at EU level**

- winter barley, durum wheat and rapeseed: little or no impact
- winter soft wheat, sunflower and grain maize: small impact
- spring barley and spring wheat: yields significantly reduced



# EU market situation

- **Cereals**
- **Oilseeds**



# Cereals

# EU Cereals Production: 2019/20 forecast

EVOLUTION OF THE EU CEREALS USABLE PRODUCTION				
Million tonnes	2017/2018	2018/2019	2019/2020 June fcst	% change 2018/2019
<b>Total Cereals</b>	<b>305.3</b>	<b>290.3</b>	<b>311.0</b>	7.1
Soft wheat	142.0	128.8	142.3	10.5
Durum wheat	8.7	8.7	8.5	-2.3
Barley	58.3	56.0	59.9	7.0
Maize	64.8	69.0	69.3	0.4
Rye	7.2	6.1	8.3	36.1
Oats	8.1	7.6	8.0	5.3

Sources : DG AGRI - G4

# EU Usable Production: 2019/2020 Forecast

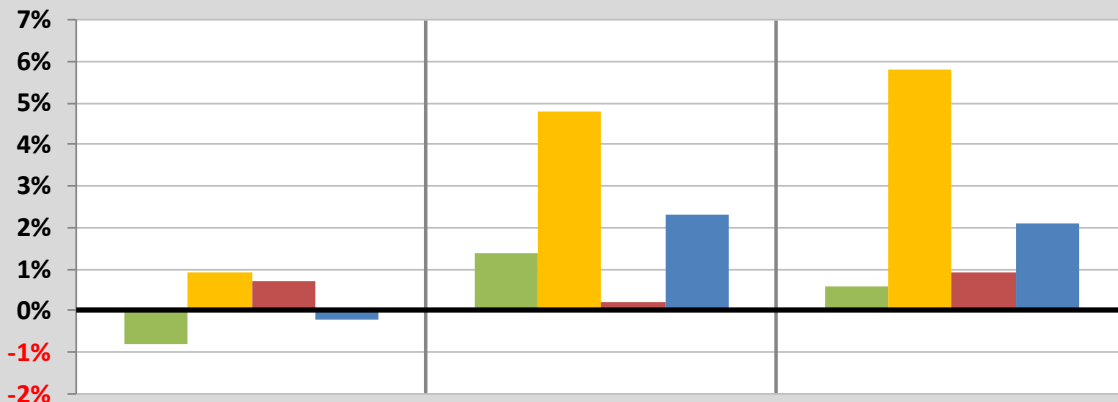
Million tonnes	EC DG AGRI 27-Jun	Stratégie Grain 13-Jun	Coceral 21-May	ADM 28-Jun
<b>Total Cereals</b>	<b>311.0</b>	<b>305.0</b>	<b>301.0</b>	<b>304.7</b>
Soft Wheat	142.3	142.8	140.3	143.1
Durum Wheat	8.5	7.7	8.1	8.4
Barley	59.9	59.6	59.0	60.4
Maize	69.3	63.4	62.9	62.4
Rye	8.3	7.5	8.6	8.5

# EU cereals production

## 2019/20 forecast: 311 million tonnes

2019/20 vs 5 year-trimmed average

Area                      Yield                      Production



- Higher area (except soft wheat)
- higher yields
- higher production

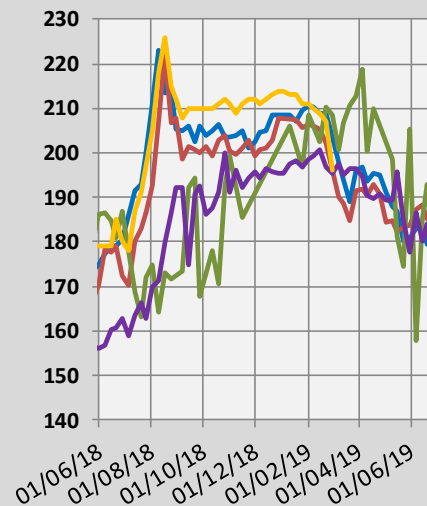
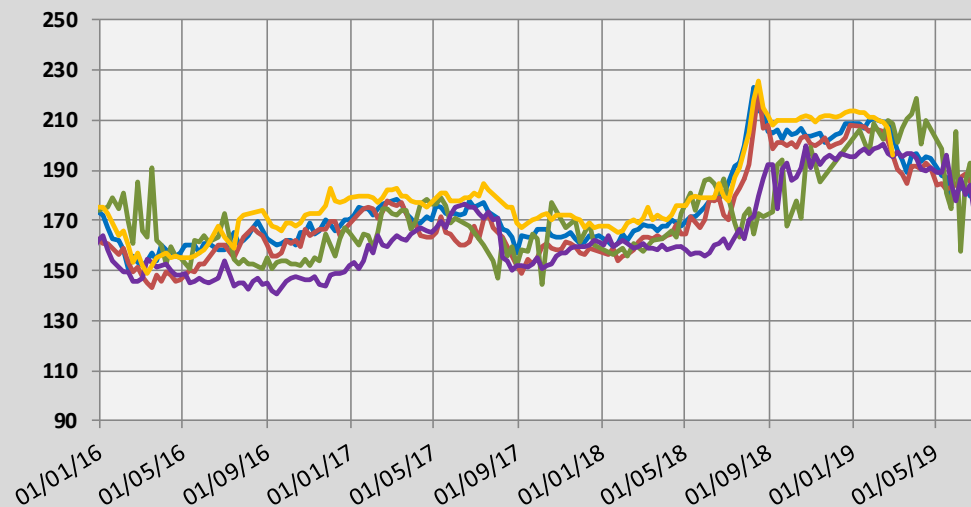
Soft wheat

Maize

Barley

Cereals

# EU market prices for milling wheat (€/t)



**Germany**  
(Hamburg)

**France**  
(Rouen)

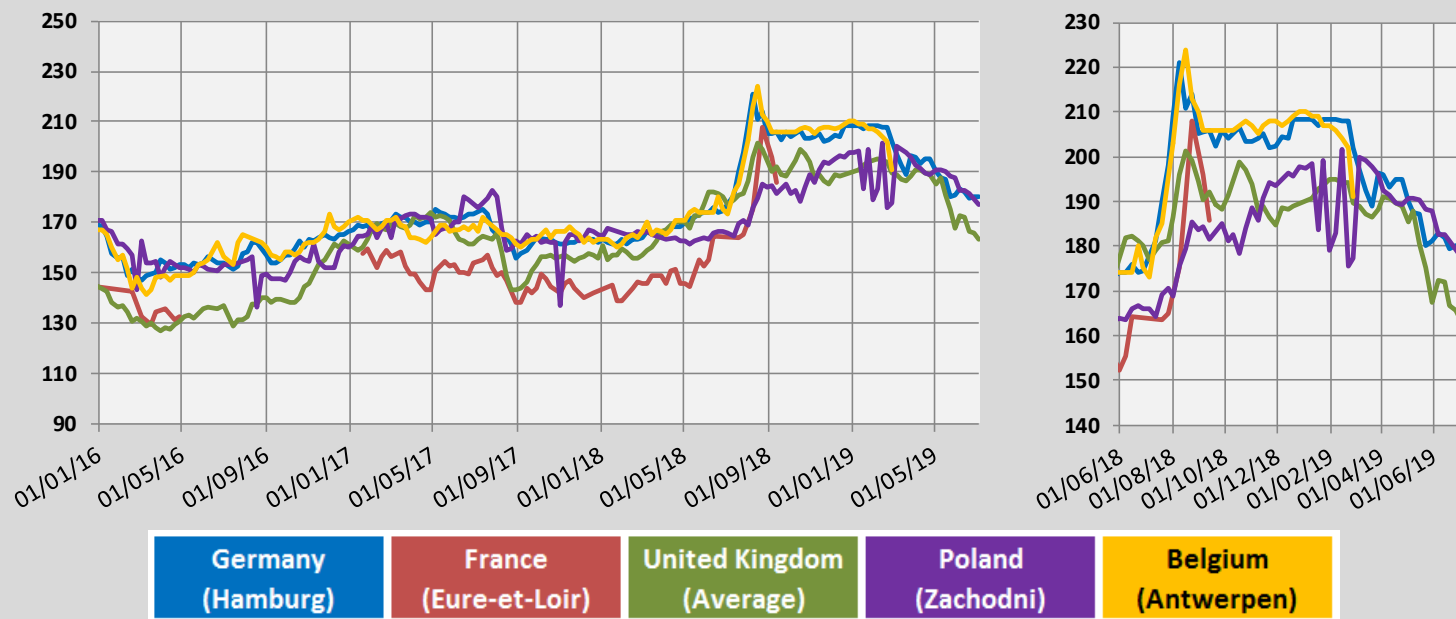
**Romania**  
(Constanta)

**Poland**  
(Zachodni)

**Belgium**  
(Antwerpen)

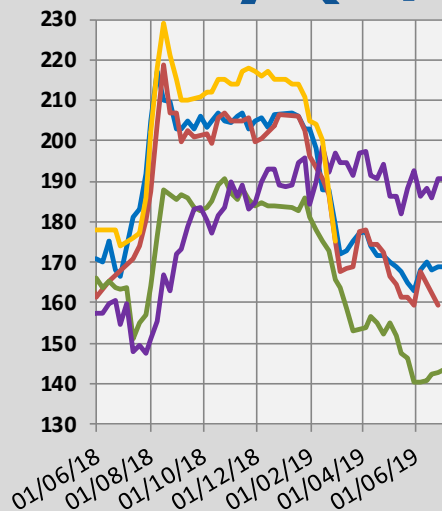
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU market prices for feed wheat (€/t)



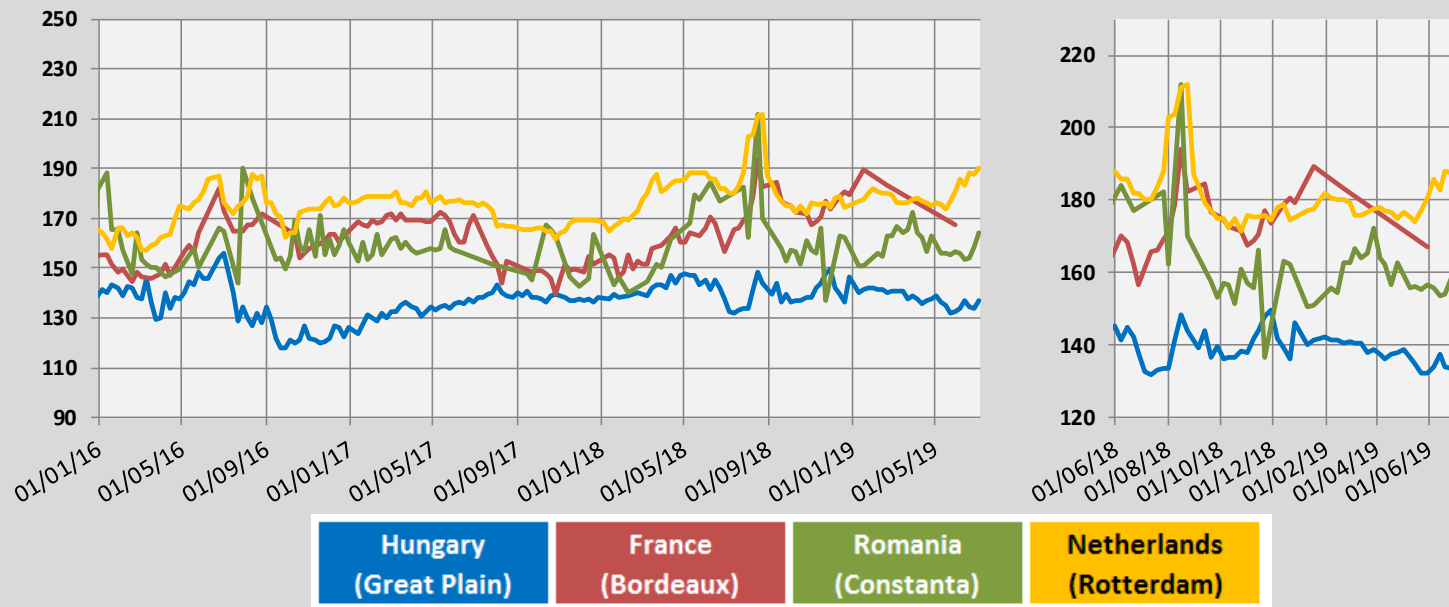
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU market prices for feed barley (€/t)



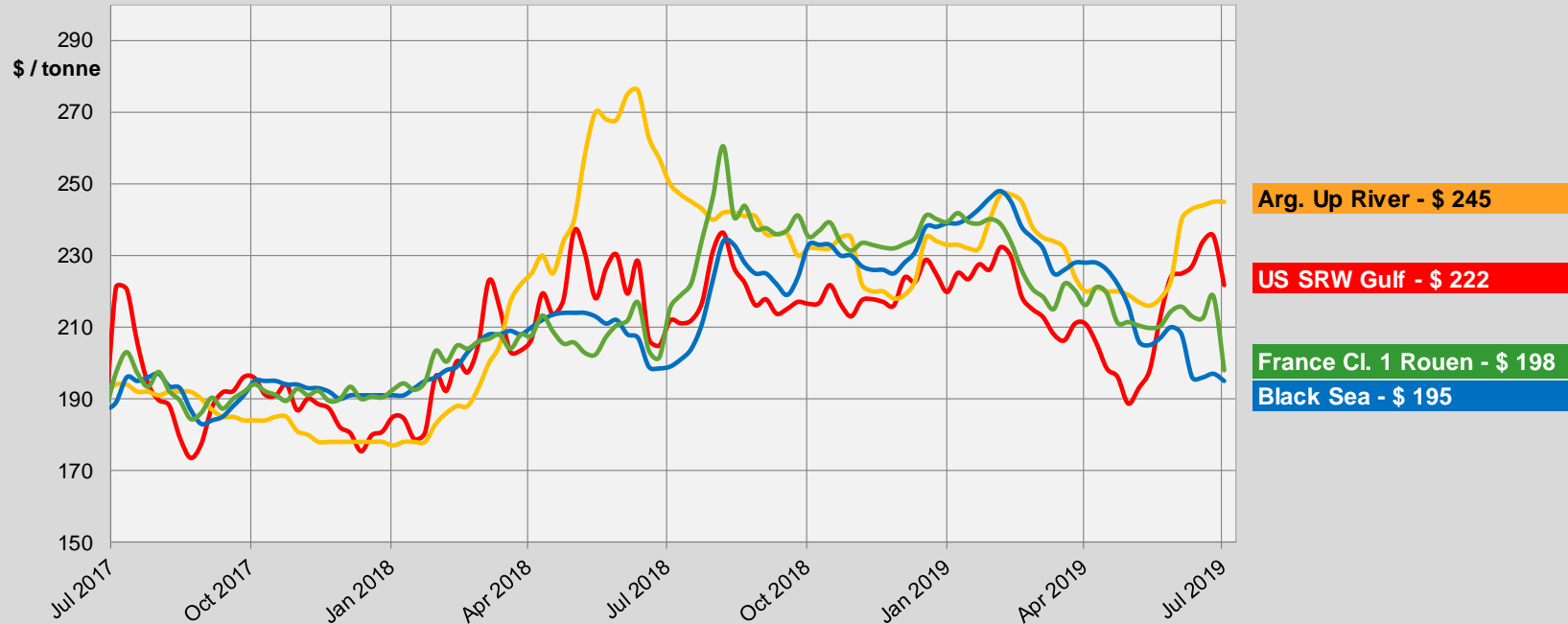
Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# EU market prices for maize (€/t)



Source: Member States notification - Commission Implementing Regulation (EU) 2017/1185 Art.11, Annex I Point 1

# Milling Soft Wheat FOB export prices



Source: IGC

# EU total cereals balance sheet

EU 28 total cereals balance sheet (thousand tonnes)					
LAST UPDATED: 27/06/2019	2015/16	2016/17	2017/18	2018/19 est	2019/20 fc
<b>Beginning stocks</b>	<b>46 386</b>	<b>43 792</b>	<b>37 363</b>	<b>47 628</b>	<b>48 479</b>
Usable production	311 699	296 699	305 259	290 350	311 028
<i>Area (thousand ha)</i>	<i>57 279</i>	<i>56 778</i>	<i>55 195</i>	<i>55 108</i>	<i>56 301</i>
<i>Yield (tonnes/ha)</i>	<i>5.4</i>	<i>5.2</i>	<i>5.5</i>	<i>5.3</i>	<i>5.5</i>
Imports (from third countries)	20 832	19 310	24 544	30 917	21 312
<b>Total supply</b>	<b>378 917</b>	<b>359 801</b>	<b>367 166</b>	<b>368 895</b>	<b>380 819</b>
Total domestic use	284 279	284 212	285 994	287 804	288 752
Human consumption	65 231	65 444	65 605	65 679	65 913
Seed	9 466	9 466	9 317	9 274	9 645
Industrial uses	33 971	34 212	34 751	34 784	35 084
<i>of which bioethanol/biofuel</i>	<i>11 989</i>	<i>12 197</i>	<i>12 613</i>	<i>12 659</i>	<i>12 959</i>
Animal feed	173 400	172 880	174 111	175 857	175 900
Losses	2 210	2 210	2 210	2 210	2 210
Exports (to third countries)	50 846	38 226	33 544	32 612	38 736
<b>Total use</b>	<b>335 125</b>	<b>322 438</b>	<b>319 538</b>	<b>320 416</b>	<b>327 488</b>
<b>Ending stocks</b>	<b>43 792</b>	<b>37 363</b>	<b>47 628</b>	<b>48 479</b>	<b>53 330</b>
Change in stocks	-2 594	-6 429	10 265	851	4 852

# EU cereals balance sheet

Thousand metric tonnes

LAST UPDATED: 27/06/2019	2019/20 (forecast)									
	Common wheat	Barley	Durum wheat	Maize	Rye	Sorghum	Oats	Triticale	Others	TOTAL CEREALS
<b>Beginning stocks</b>	<b>11 644</b>	<b>5 930</b>	<b>1 567</b>	<b>26 877</b>	<b>314</b>	<b>700</b>	<b>154</b>	<b>1 204</b>	<b>89</b>	<b>48 479</b>
Usable production	142 340	59 884	8 479	69 338	8 280	800	7 995	10 193	3 720	311 028
<i>Area (thousand ha)</i>	<i>23 804</i>	<i>12 355</i>	<i>2 375</i>	<i>8 787</i>	<i>2 200</i>	<i>155</i>	<i>2 649</i>	<i>2 554</i>	<i>1 422</i>	<i>56 301</i>
<i>Yield (tonnes/ha)</i>	<i>6.0</i>	<i>4.8</i>	<i>3.6</i>	<i>7.9</i>	<i>3.8</i>	<i>5.2</i>	<i>3.0</i>	<i>4.0</i>	<i>2.6</i>	<i>5.5</i>
Imports (from third countries)	3 379	221	1 726	15 483	80	259	4		161	21 312
<b>Total supply</b>	<b>157 363</b>	<b>66 036</b>	<b>11 772</b>	<b>111 698</b>	<b>8 673</b>	<b>1 759</b>	<b>8 153</b>	<b>11 397</b>	<b>3 970</b>	<b>380 819</b>
Total domestic use	117 780	50 306	9 648	82 815	6 452	738	7 468	9 894	3 651	288 752
Human consumption	48 147	363	8 071	4 881	3 069	156	1 152	52	23	65 913
Seed	4 872	2 186	442	427	452	33	444	503	286	9 645
Industrial uses	11 261	9 156	95	12 507	1 311		103	449	202	35 084
<i>of which bioethanol/biofuel</i>	<i>4 665</i>	<i>437</i>		<i>6 800</i>	<i>700</i>			<i>344</i>	<i>14</i>	<i>12 959</i>
Animal feed	52 600	38 200	1 000	64 400	1 550	550	5 700	8 800	3 100	175 900
Losses	900	400	40	600	70		70	90	40	2 210
Exports (to third countries)	25 494	8 824	1 143	2 921	154	3	187	2	8	38 736
<b>Total use</b>	<b>143 274</b>	<b>59 131</b>	<b>10 791</b>	<b>85 736</b>	<b>6 606</b>	<b>741</b>	<b>7 655</b>	<b>9 896</b>	<b>3 659</b>	<b>327 488</b>
<b>Ending stocks**</b>	<b>14 089</b>	<b>6 905</b>	<b>981</b>	<b>25 961</b>	<b>2 067</b>	<b>1 017</b>	<b>498</b>	<b>1 501</b>	<b>311</b>	<b>53 330</b>
<b>Change in stocks**</b>	<b>2 445</b>	<b>975</b>	<b>-586</b>	<b>-916</b>	<b>1 753</b>	<b>318</b>	<b>343</b>	<b>297</b>	<b>222</b>	<b>4 852</b>

\* Marketing year: from July to June

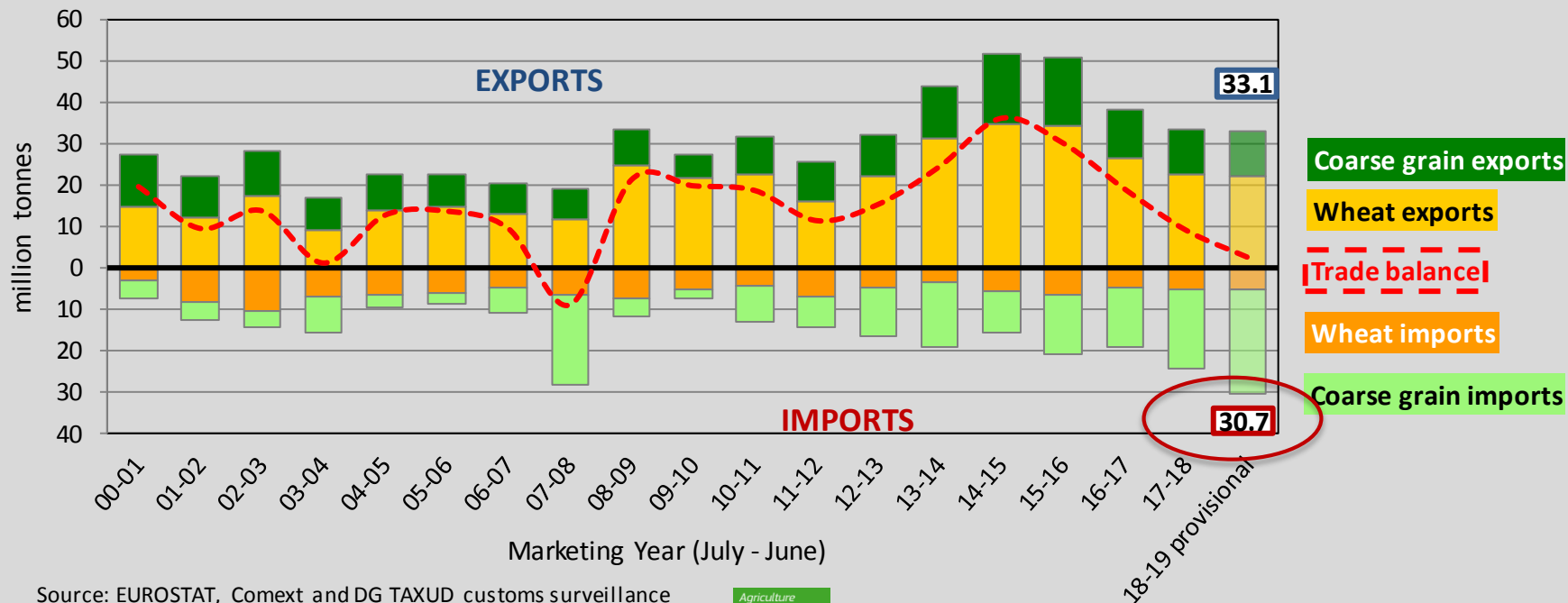
\*\* At the end of the marketing year



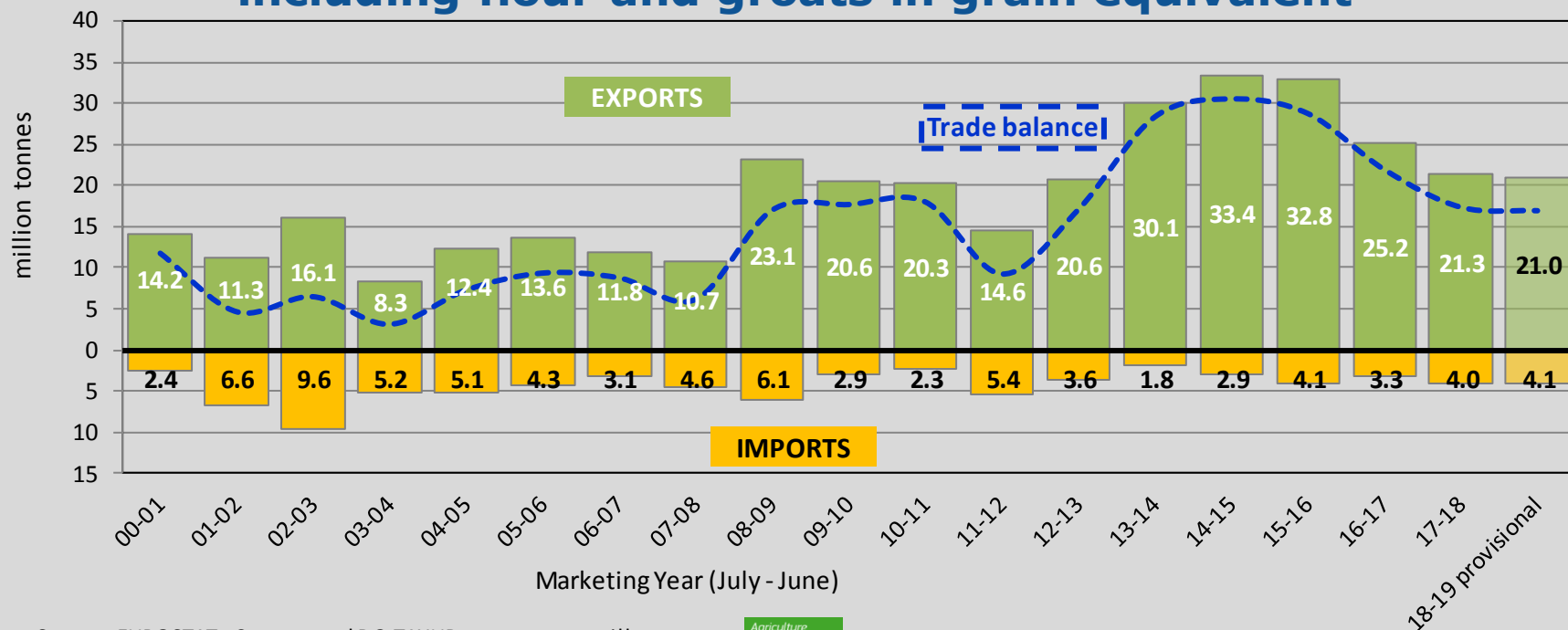
# EU Cereals Market

- Impact of the heatwave on yield prospects and quality?
- Commission estimates of industrial use for cereals? Developments in bioeconomy sector?

## EU28 – Cereals exports and imports – (July - June) including flour and groats in grain equivalent

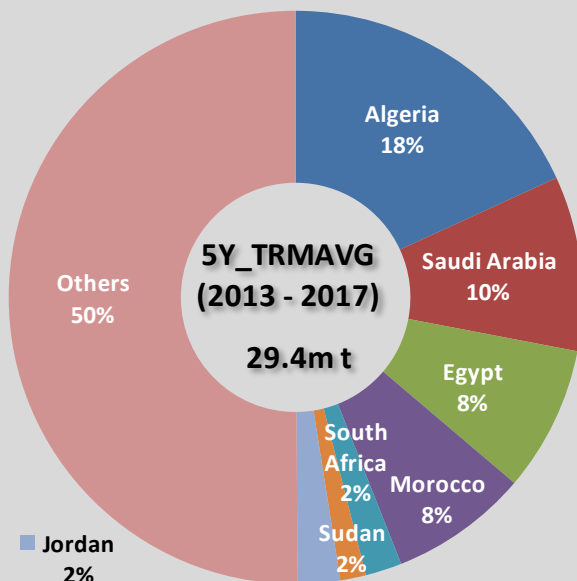


## EU28 – Common wheat exports and imports (July - June) including flour and groats in grain equivalent

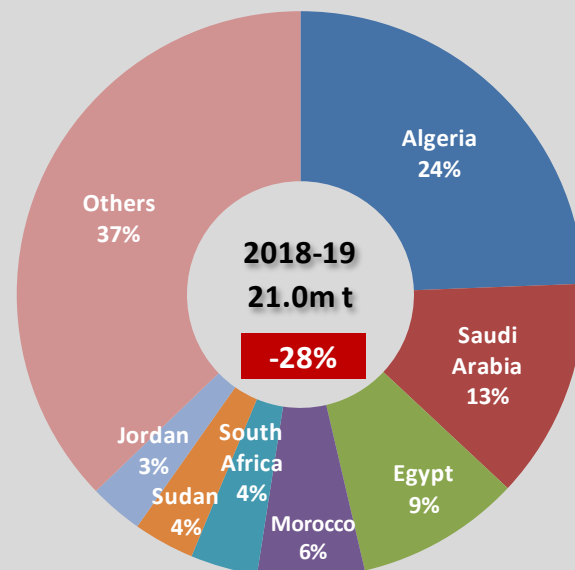


Source: EUROSTAT, Comext and DG TAXUD customs surveillance

# EU common wheat export destinations (July - June)

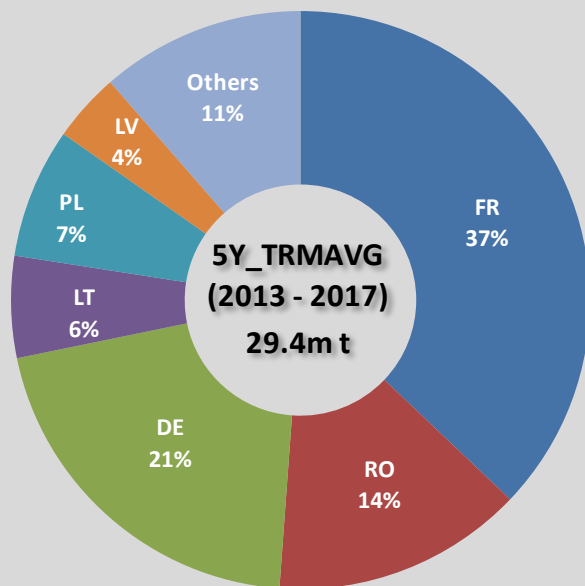


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
Algeria	5 332	5 131	↓ -4%
Saudi Arabia	2 894	2 645	↓ -9%
Egypt	2 408	1 974	↓ -18%
Morocco	2 289	1 282	↓ -44%
South Africa	605	804	↑ 33%
Sudan	423	732	↑ 73%
Jordan	700	642	↓ -8%
Others	14 716	7 824	↓ -47%

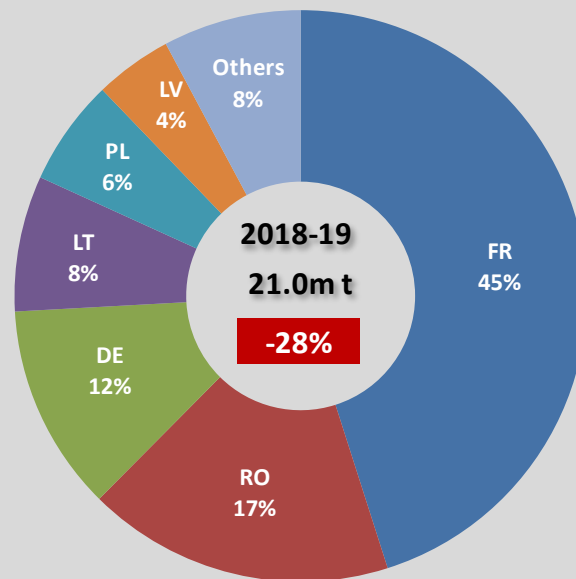


Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

# EU MS exporting common wheat (July - June)

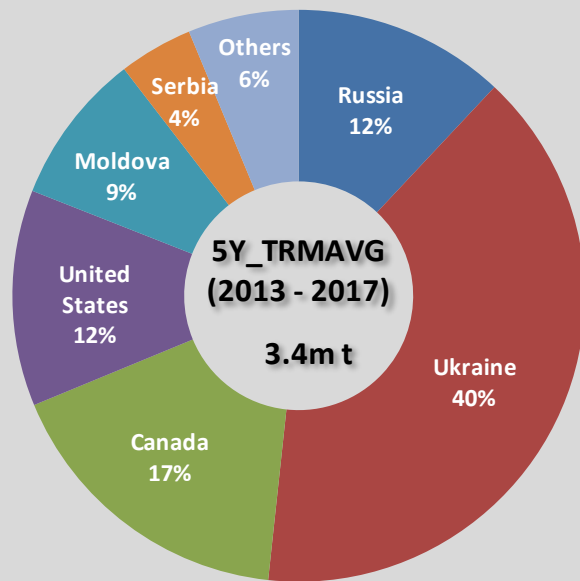


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
FR	10 897	9 483 ↓	-13%
RO	4 126	3 649 ↓	-12%
DE	6 054	2 461 ↓	-59%
LT	1 670	1 616 ↓	-3%
PL	2 137	1 264 ↓	-41%
LV	1 130	920 ↓	-19%
Others	3 351	1 642 ↓	-51%

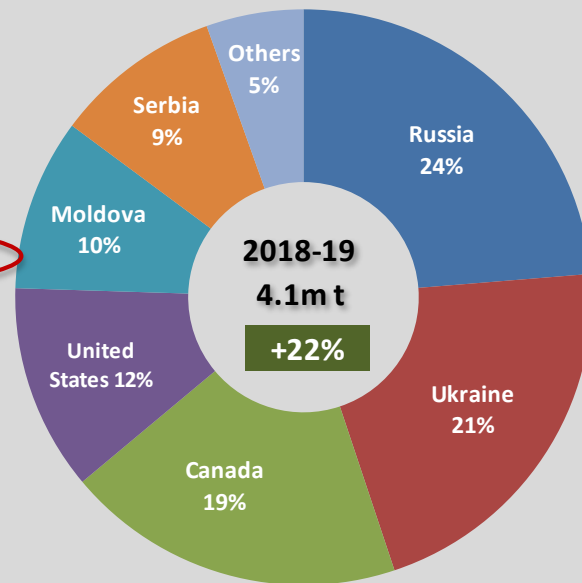


Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

# EU common wheat import origins (July - June)

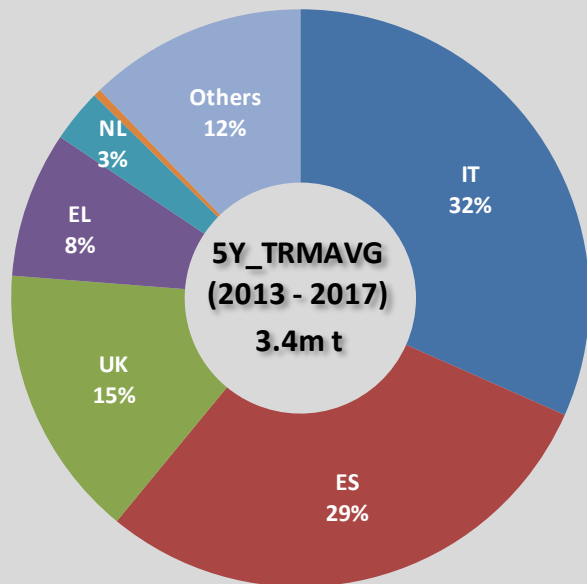


	5Y_TRMAVG (2013 - 2017)	2018-19		
(Thousand t)				
Russia	404	974	↑	141%
Ukraine	1 339	870	↓	-35%
Canada	575	782	↑	36%
United States	412	476	↑	15%
Moldova	290	397	↑	37%
Serbia	141	386	↑	174%
Others	211	224	↑	6%

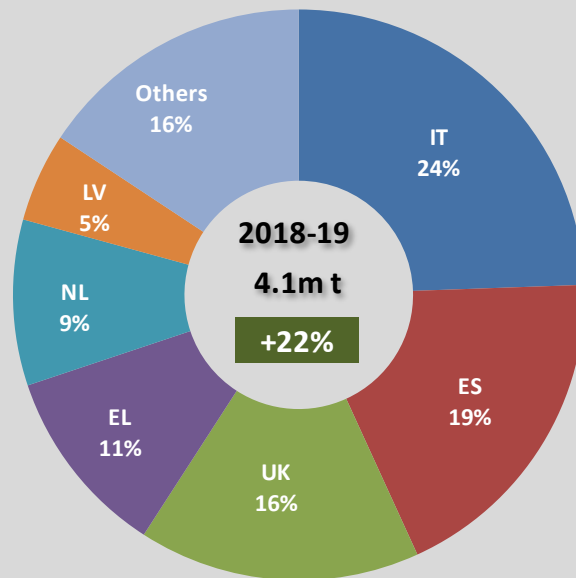


Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

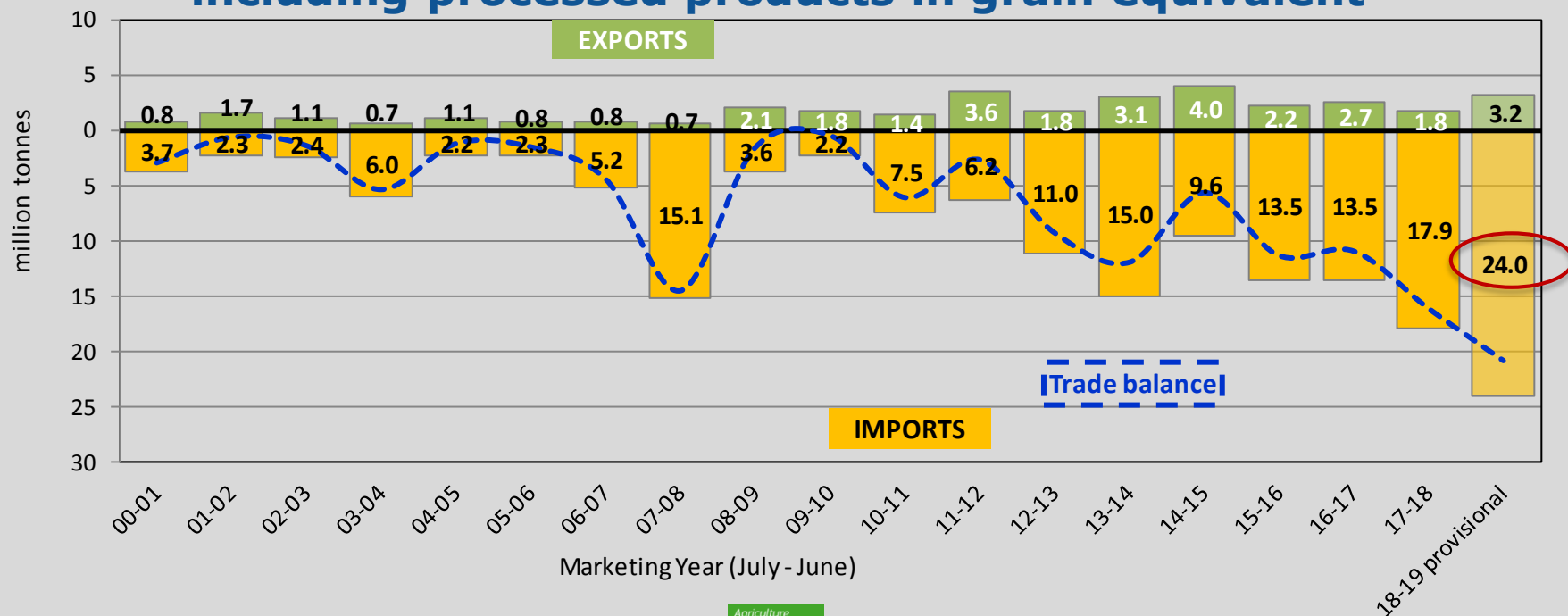
## EU MS importing common wheat (July - June)



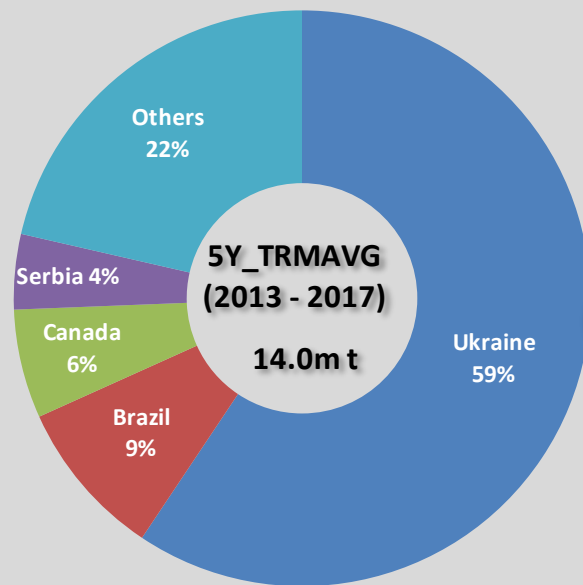
	5Y_TRMAVG (2013 - 2017)	2018-19	
(Thousand t)			
IT	1 067	1 004	↓ -6%
ES	989	770	↓ -22%
UK	516	655	↑ 27%
EL	276	441	↑ 60%
NL	100	386	↑ 286%
LV	14	207	↑ 1334%
Others	411	645	↑ 57%



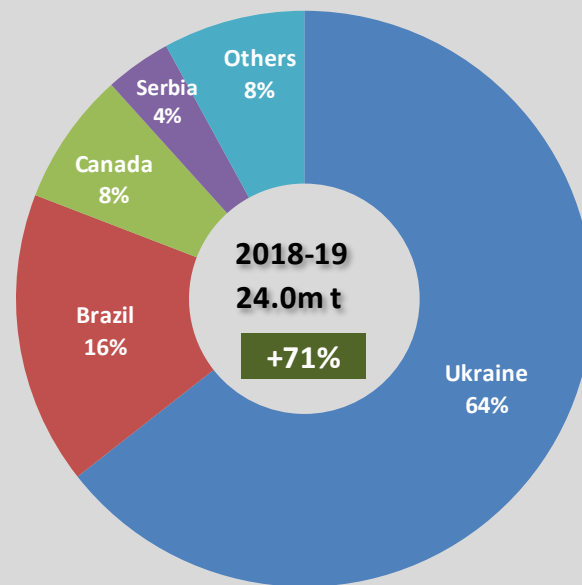
## EU28 – Maize exports and imports – (July - June) including processed products in grain equivalent



# EU maize import origins (July - June)

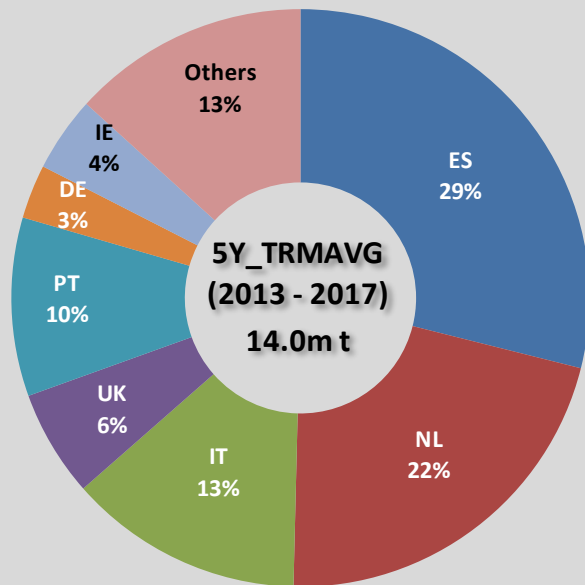


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
Ukraine	8 324	15 460	↑ 86%
Brazil	1 247	3 949	↑ 217%
Canada	858	1 793	↑ 109%
Serbia	592	892	↑ 51%
Others	3 002	1 910	↓ -36%

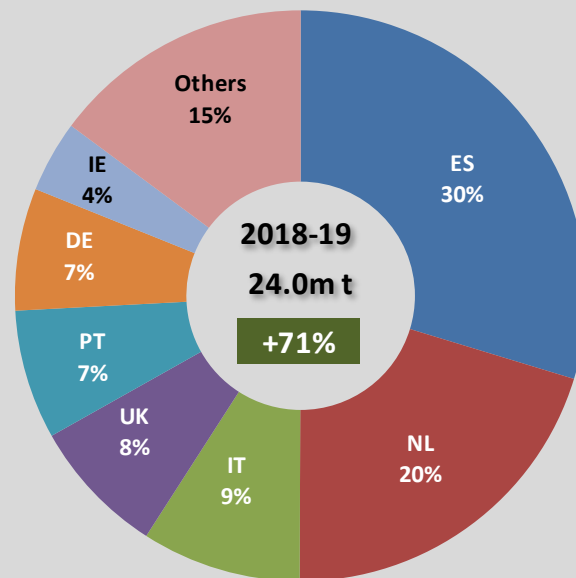


Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

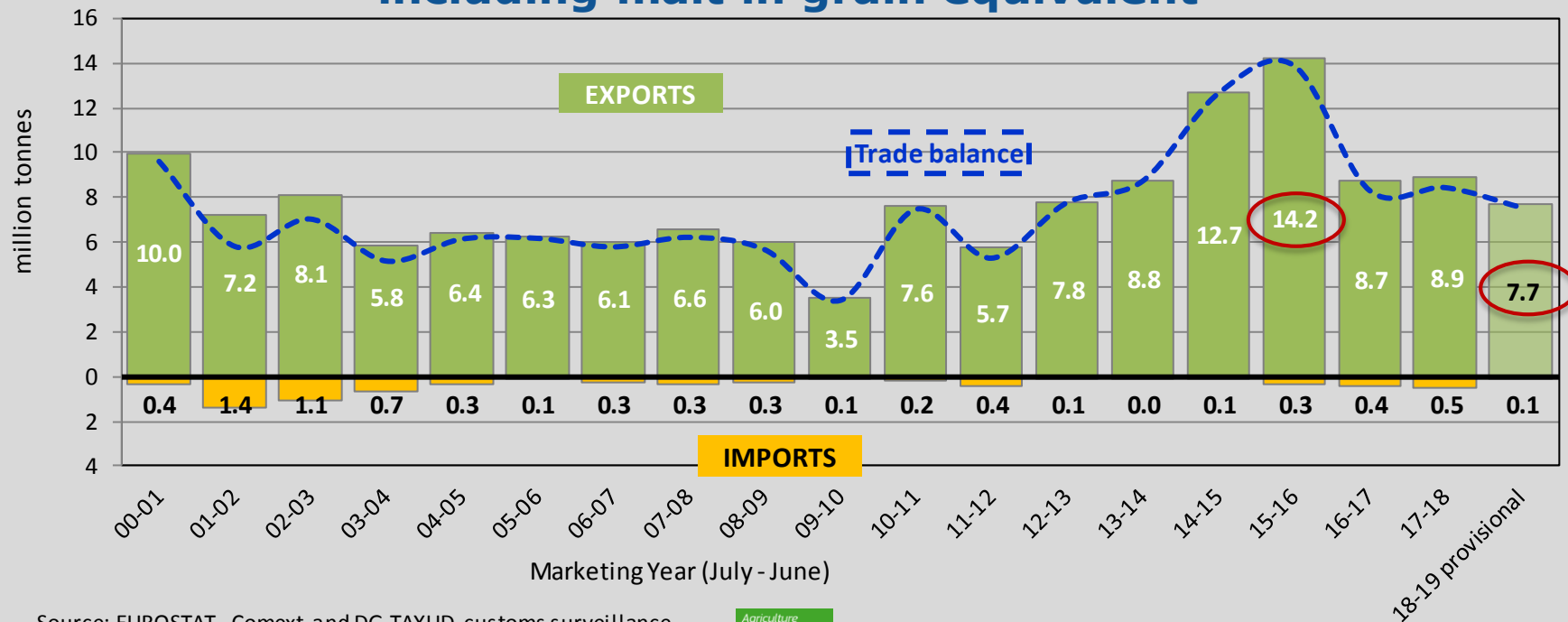
## EU MS importing maize (July - June)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
ES	4 054	7 131	↑ 76%
NL	3 011	4 885	↑ 62%
IT	1 843	2 168	↑ 18%
UK	837	1 861	↑ 122%
PT	1 402	1 759	↑ 25%
DE	424	1 663	↑ 292%
IE	590	975	↑ 65%
Others	1 861	3 563	↑ 91%

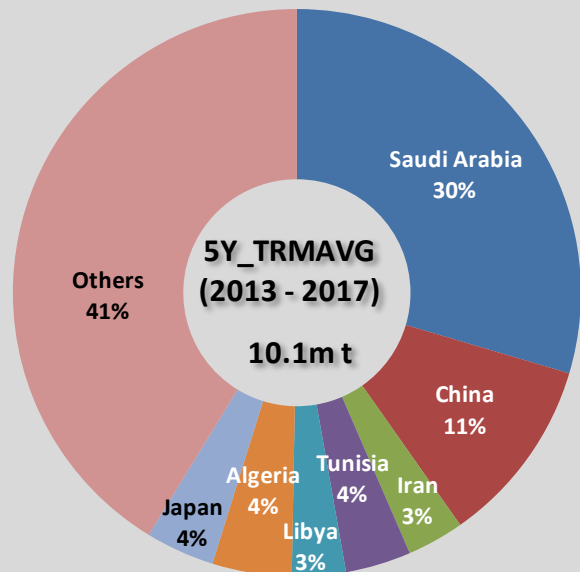


## EU28 – Barley exports and imports – (July - June) including malt in grain equivalent

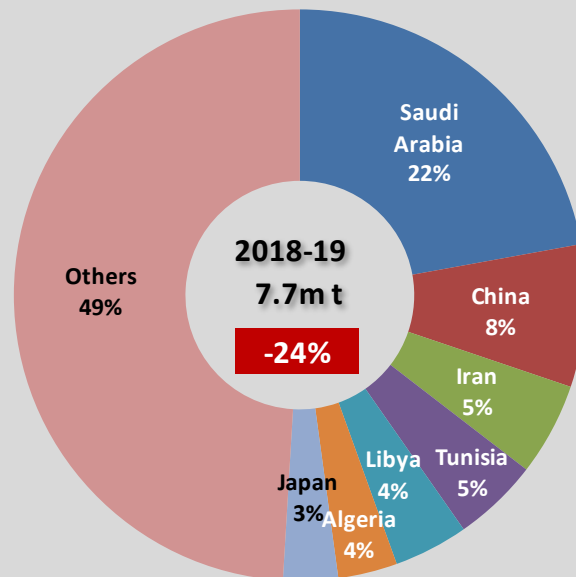


Source: EUROSTAT, Comext and DG TAXUD customs surveillance

## EU barley export destinations (July - June)

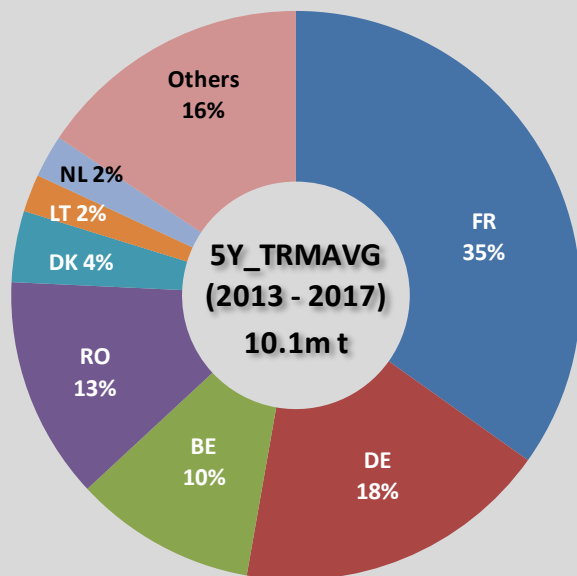


	5Y_TRMAVG (2013 - 2017)	2018-19	
(Thousand t)			
Saudi Arabia	3 000	1 705	↓ -43%
China	1 082	621	↓ -43%
Iran	329	404	↑ 23%
Tunisia	378	373	↓ -2%
Libya	310	324	↑ 4%
Algeria	459	258	↓ -44%
Japan	398	238	↓ -40%
Others	4 185	3 777	↓ -10%

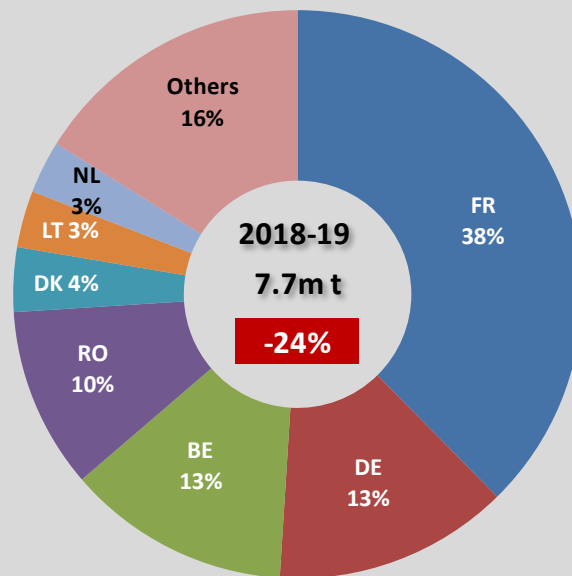


Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

## EU MS exporting barley (July - June)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
FR	3 533	2 896	↓ -18%
DE	1 818	1 030	↓ -43%
BE	1 047	978	↓ -7%
RO	1 283	793	↓ -38%
DK	411	282	↓ -31%
LT	216	249	↑ 15%
NL	246	231	↓ -6%
Others	1 587	1 240	↓ -22%





## EU Cereals Trade

- Risks for Russia acceding more traditional EU wheat export markets (Algeria, Saudi Arabia...)?
- The EU maize imports forecast for 2019/20, new record or back to more traditional level?



# Oilseeds

# EU Oilseeds

## EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2018/19	2019/20 June	change year on year	change on 5yrs AVG
Rapeseed	6.67	6.93	<b>5.95</b>	-14.1%	-10.7%
Sunflower	4.20	4.13	<b>4.42</b>	7.2%	5.3%
Soya Beans	0.89	0.96	<b>0.99</b>	3.8%	11.0%
<b>TOTAL</b>	<b>11.76</b>	<b>12.01</b>	<b>11.37</b>	<b>-5%</b>	<b>-3%</b>

## EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2018/19	2019/20 June	change 2018/19	change AVG 5yrs
Rapeseed	21.31	20.04	<b>18.71</b>	-6.6%	-12.2%
Sunflower	9.33	9.96	<b>10.64</b>	6.8%	14.1%
Soya Beans	2.51	2.83	<b>2.91</b>	3.1%	16.2%
<b>TOTAL</b>	<b>32.88</b>	<b>32.83</b>	<b>32.26</b>	<b>-1.7%</b>	<b>-2.7%</b>

Sources : EC - DG AGRI

# EU oilseeds production

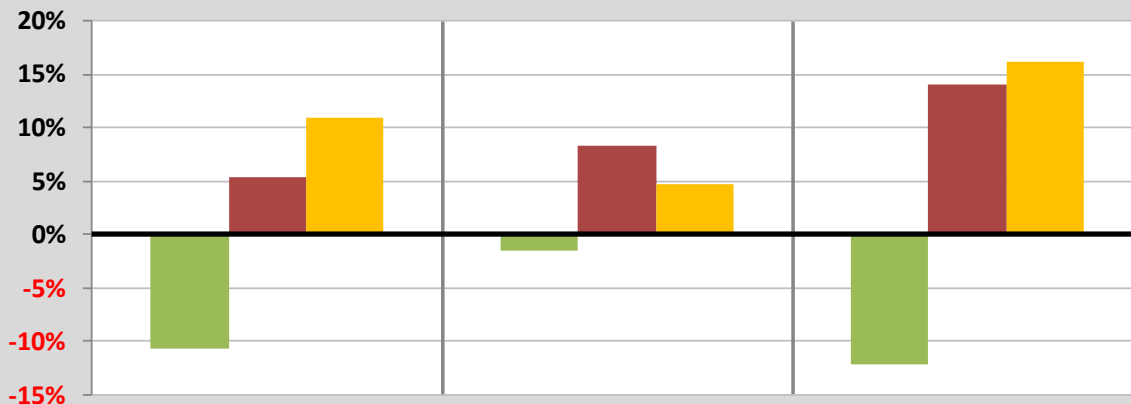
## 2019/20 forecast: 32.3 million tonnes

2019/20 vs 5 year-trimmed average

Area

Yield

Production



Rapeseed

Sunflower

Soya beans

**lower area, yields  
and ultimately lower  
production for  
rapeseed**

# EU Rapeseed: MS

Production Million tonnes	AVG 5 yrs trimmed	2018/19	2019/20 June	change year on year	%change 5yrs trimmed
<b>TOTAL EU</b>	<b>21.31</b>	<b>20.02</b>	<b>18.71</b>	<b>-6.6%</b>	<b>-12.2%</b>
France	5.21	4.95	<b>4.18</b>	-15%	-20%
Germany	4.62	3.68	<b>3.17</b>	-14%	-32%
Poland	2.54	2.16	<b>2.48</b>	15%	-2%
UK	2.23	2.07	<b>1.98</b>	-5%	-12%
Czech Republic	1.34	1.41	<b>1.37</b>	-3%	2%
Romania	1.32	1.61	<b>1.27</b>	-21%	-4%
Others	4.04	4.14	<b>4.27</b>	3%	6%

Sources : DG AGRI G.4

# EU Oilseeds Balance Sheet

Thousand metric tonnes

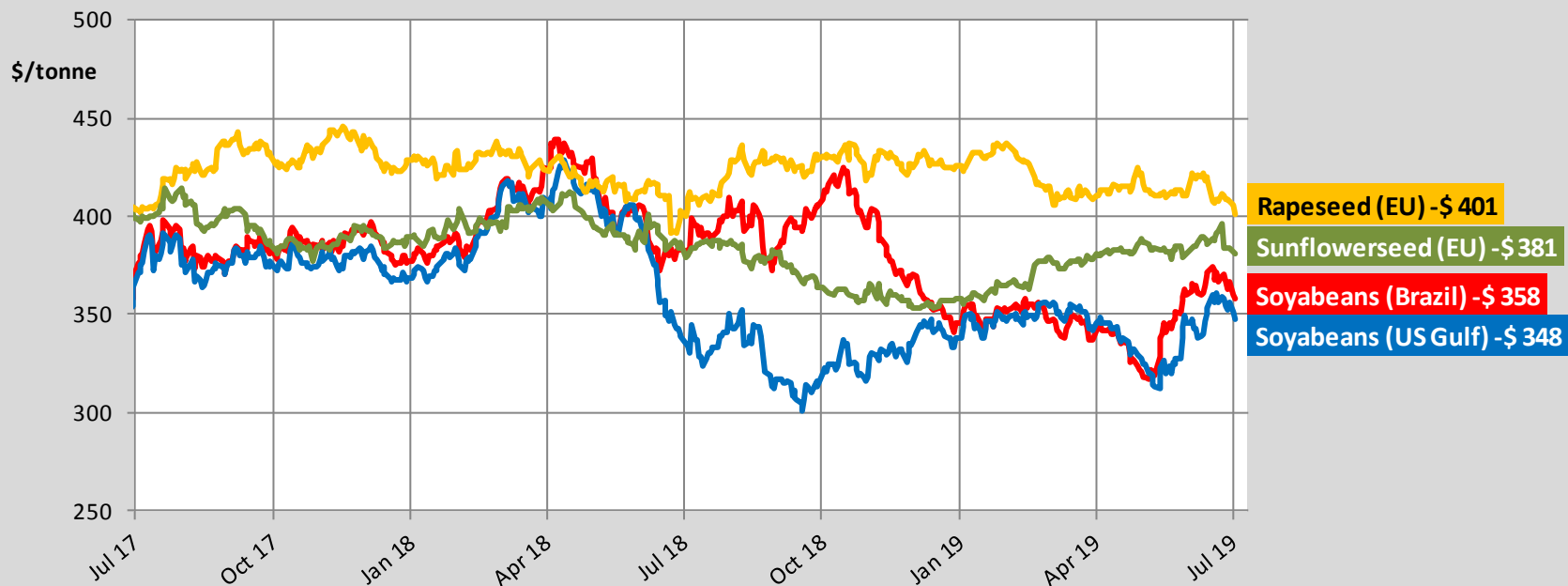
OILSEED	2018/19 est				2019/20 fc			
LAST UPDATED: 27/06/2019	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
<b>Beginning stocks</b>	2 287	2 296	937	5 520	1 520	2 140	891	4 551
Usable production	20 043	2 827	9 964	32 833	18 711	2 913	10 640	32 264
Area (thousand ha)	6 928	955	4 126	12 010	5 950	992	4 424	11 366
Yield (tonnes/ha)	2.9	3.0	2.4	2.7	3.1	2.9	2.4	2.8
Imports (from third countries)	4 300	15 100	500	19 900	4 500	15 000	506	20 006
<b>Total supply</b>	<b>26 630</b>	<b>20 223</b>	<b>11 401</b>	<b>58 253</b>	<b>24 731</b>	<b>20 053</b>	<b>12 037</b>	<b>56 821</b>
Domestic use	25 010	17 892	10 010	52 912	23 468	18 775	10 718	52 961
of which crushing	24 112	15 830	8 903	48 845	22 617	16 480	9 569	48 666
Exports (to third countries)	100	190	500	790	263	178	494	935
<b>Total use</b>	<b>25 110</b>	<b>18 083</b>	<b>10 510</b>	<b>53 702</b>	<b>23 731</b>	<b>18 953</b>	<b>11 212</b>	<b>53 896</b>
<b>Ending stocks</b>	<b>1 520</b>	<b>2 140</b>	<b>891</b>	<b>4 551</b>	<b>1 000</b>	<b>1 100</b>	<b>825</b>	<b>2 925</b>
Change in stocks	-767	-156	-46	-969	-520	-1 040	-66	-1 626

# EU Oilseed meal Balance Sheet

Thousand metric tonnes

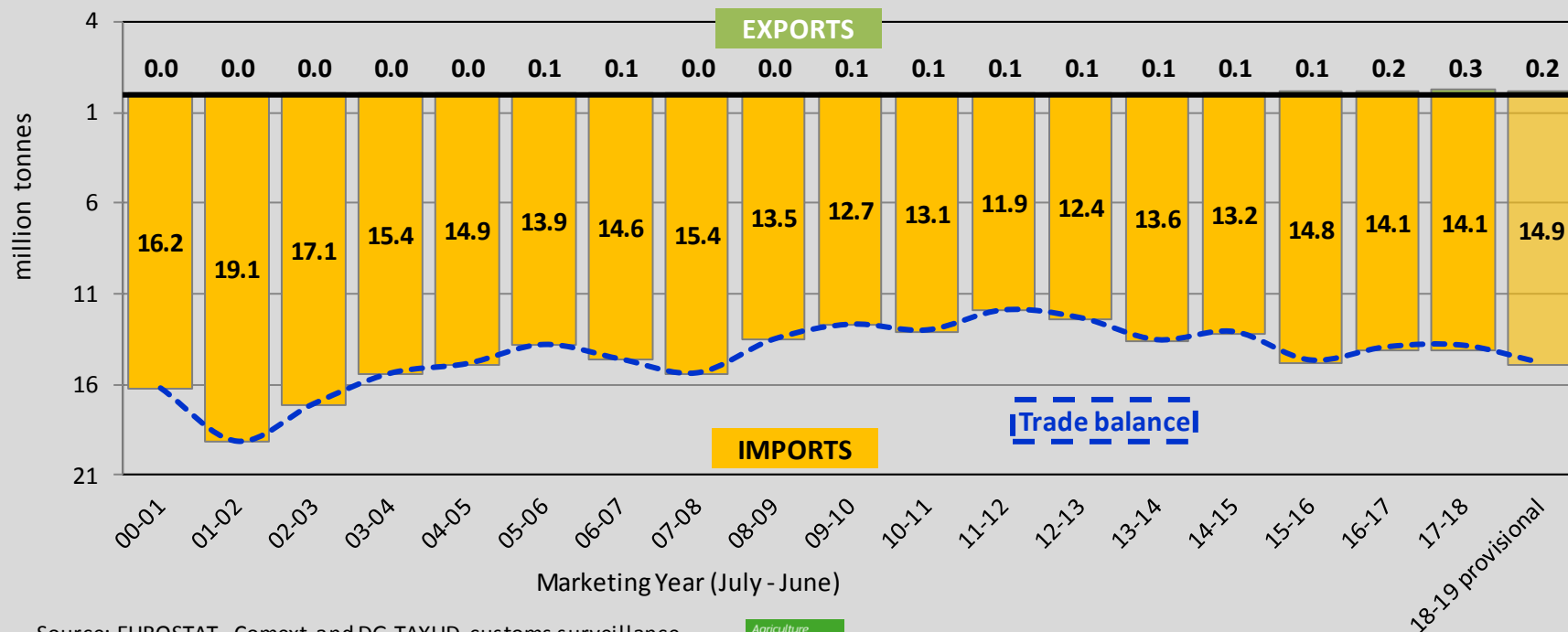
OILSEED MEAL	2018/19 est				2019/20 fc			
LAST UPDATED: 27/06/2019	Rapeseed	Soybean	Sunflower	TOTAL	Rapeseed	Soybean	Sunflower	TOTAL
<b>Beginning stocks</b>	<b>50</b>	<b>344</b>	<b>100</b>	<b>494</b>	<b>50</b>	<b>343</b>	<b>100</b>	<b>493</b>
Usable production	13 744	12 505	4 896	31 146	12 892	13 019	5 263	31 174
Imports (from third countries)	500	17 600	3 500	21 600	368	18 000	3 462	21 830
<b>Total supply</b>	<b>14 294</b>	<b>30 450</b>	<b>8 496</b>	<b>53 240</b>	<b>13 310</b>	<b>31 362</b>	<b>8 826</b>	<b>53 497</b>
Domestic use	13 844	29 607	7 996	51 448	12 812	30 688	8 411	51 911
Exports (to third countries)	400	500	400	1 300	448	333	314	1 095
<b>Total use</b>	<b>14 244</b>	<b>30 107</b>	<b>8 396</b>	<b>52 748</b>	<b>13 260</b>	<b>31 022</b>	<b>8 726</b>	<b>53 007</b>
<b>Ending stocks</b>	<b>50</b>	<b>343</b>	<b>100</b>	<b>493</b>	<b>50</b>	<b>340</b>	<b>100</b>	<b>490</b>
Change in stocks	-	-2	-	-2	-	-2	-	-2

# Oilseeds FOB export prices



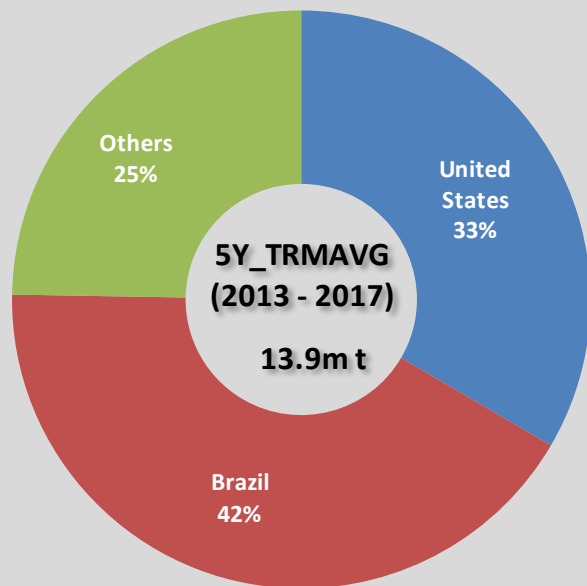
Source: IGC

## EU28 – Soya bean exports and imports (July - June)

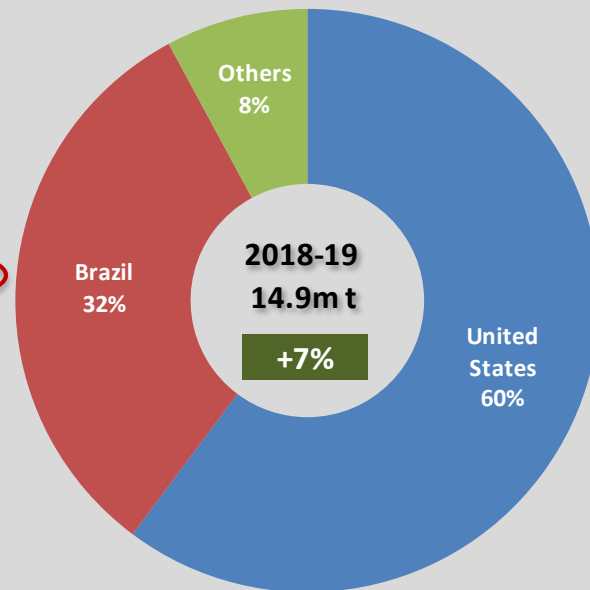


Source: EUROSTAT, Comext and DG TAXUD customs surveillance

# EU soya beans import origins (July - June)

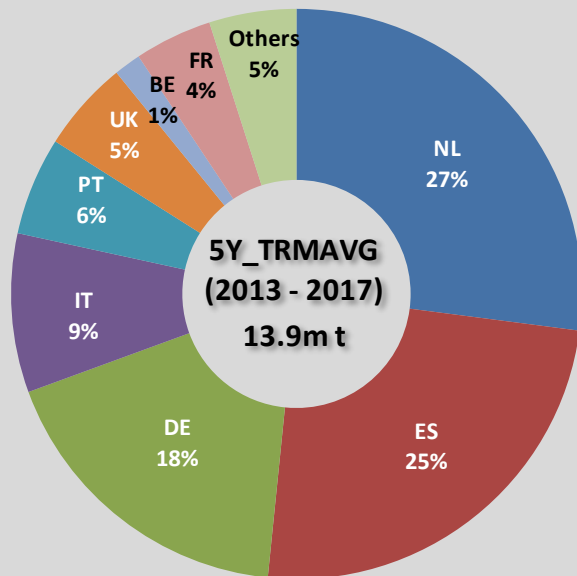


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19
United States	4 659	9 002 <span>↑</span> 93%
Brazil	5 832	4 770 <span>↓</span> -18%
Others	3 447	1 178 <span>↓</span> -66%

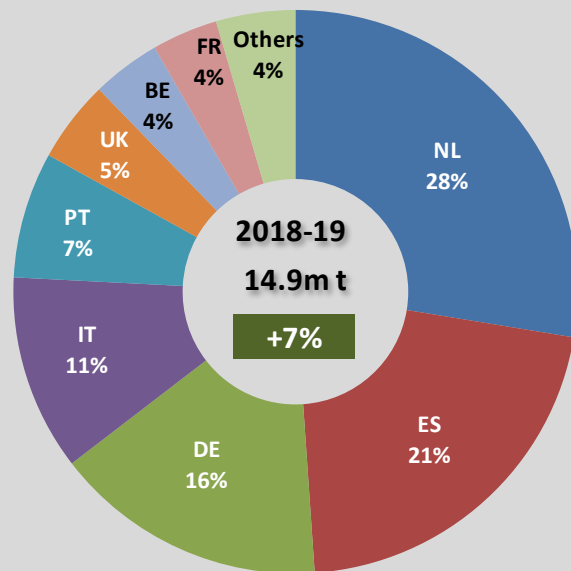


Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

## EU MS importing soya beans (July - June)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
NL	3 771	4 125	↑ 9%
ES	3 422	3 187	↓ -7%
DE	2 482	2 341	↓ -6%
IT	1 256	1 681	↑ 34%
PT	775	1 082	↑ 40%
UK	719	702	↓ -2%
BE	213	588	↑ 176%
FR	612	565	↓ -8%
Others	688	679	↓ -1%



Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

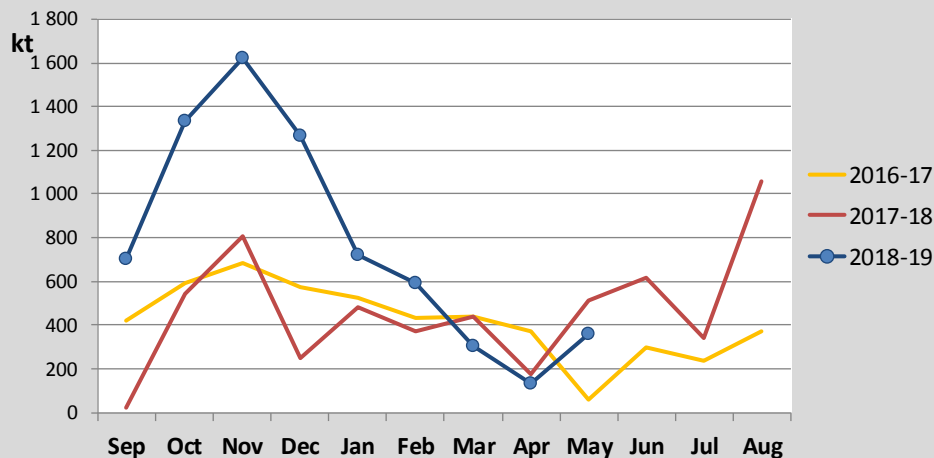
# A renewed interest of EU crushers for US soya beans?

Soya beans: spread US and BR prices



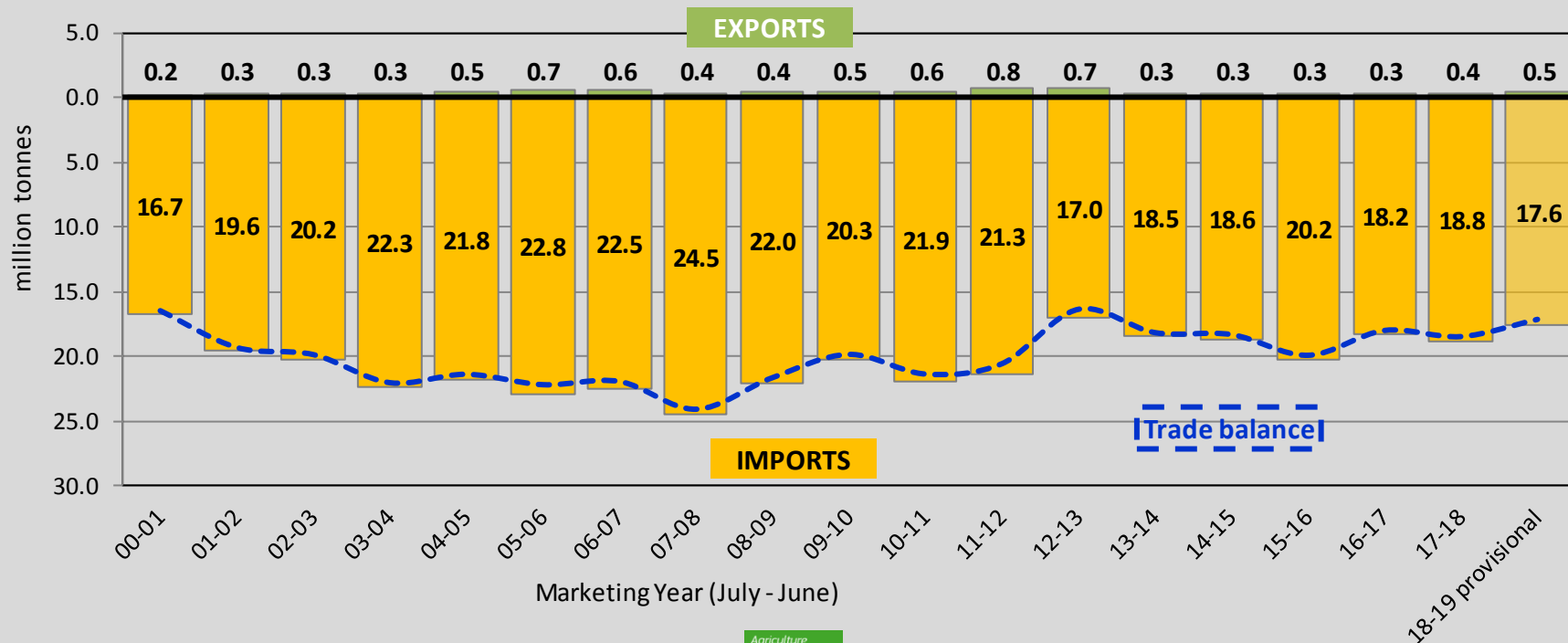
Source: International Grains Council

US exports of soya beans to EU - based on sales commitments



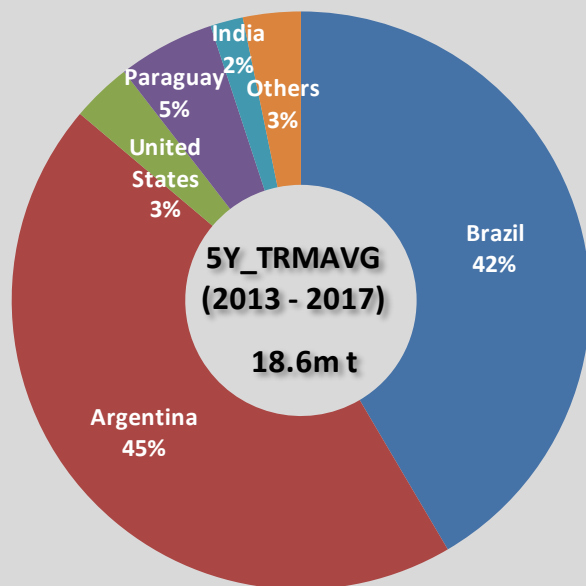
Source: USDA

## EU28 – Soya meal exports and imports (July - June)

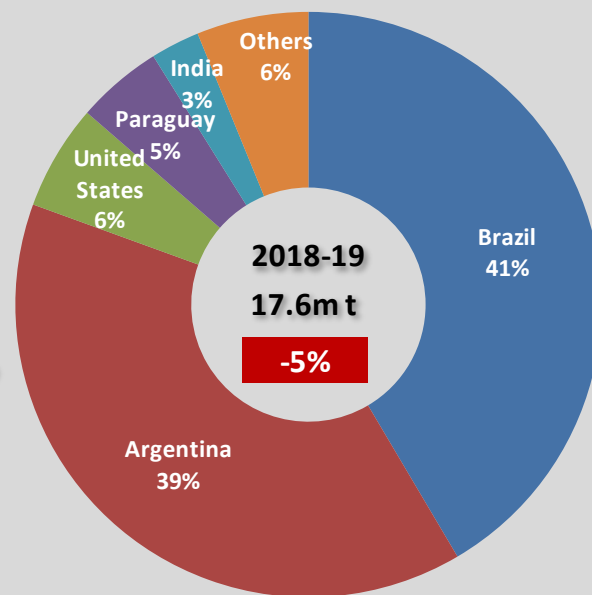


Source: EUROSTAT, Comext and DG TAXUD customs surveillance

## EU soya meal import origins (July - June)

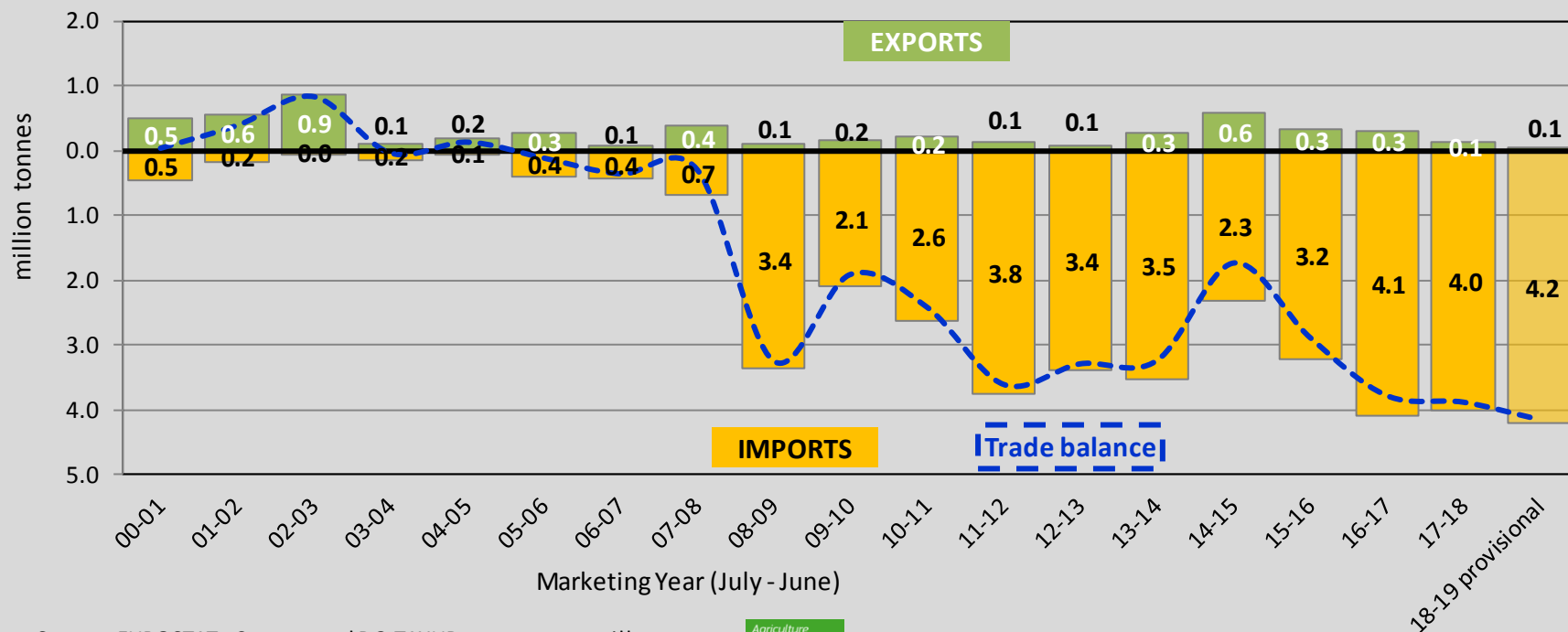


(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19		
Brazil	7 733	7 309	↓	-5%
Argentina	8 314	6 876	↓	-17%
United States	625	1 025	↑	64%
Paraguay	1 009	836	↓	-17%
India	341	476	↑	40%
Others	601	1 087	↑	81%



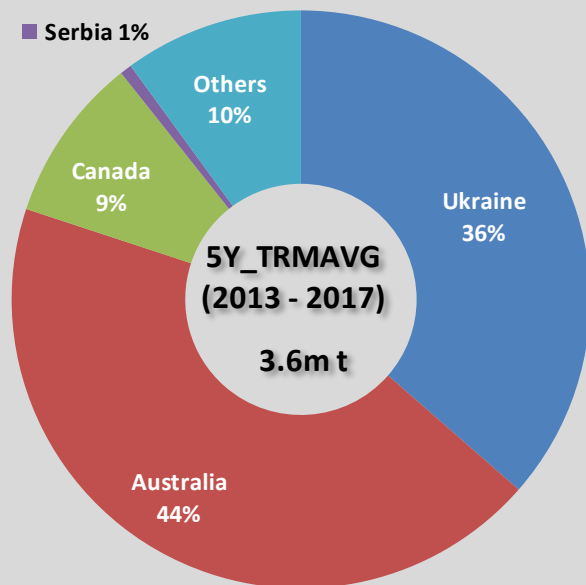
Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

## EU28 – Rapeseed exports and imports (July - June)

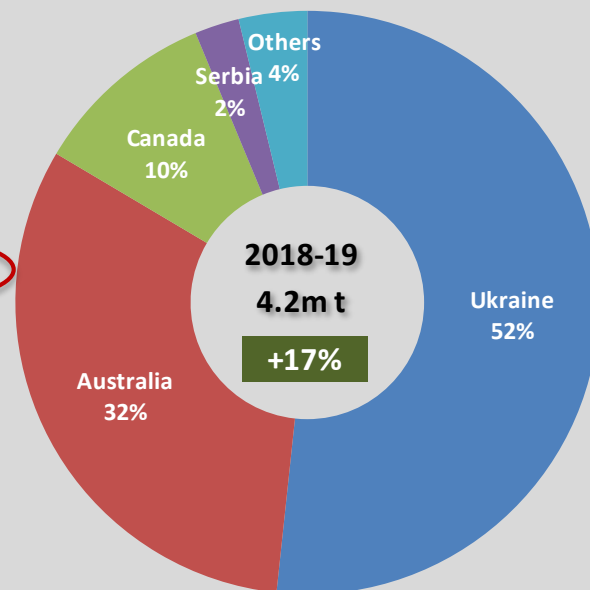


Source: EUROSTAT, Comext and DG TAXUD customs surveillance

# EU rapeseed import origins (July - June)



(Thousand t)	5Y_TRMAVG (2013 - 2017)	2018-19	
Ukraine	1 306	2 175	↑ 67%
Australia	1 564	1 340	↓ -14%
Canada	332	430	↑ 30%
Serbia	24	104	↑ 341%
Others	359	159	↓ -56%



Source: Eurostat- Comext & DG TAXUD customs surveillance - Provisional data for 2018-19

## EU Oilseeds

- What are your expectations for soya (beans and meals) imports in the 2019/20 marketing year?
- How do you see the development of EU rapeseed imports (origins and level)?

**Thank you for your attention!**

**Market data for cereals, oilseeds and protein  
crops are available at the  
EU Crops Market Observatory**

**[https://ec.europa.eu/agriculture/market-  
observatory/crops](https://ec.europa.eu/agriculture/market-observatory/crops)**