



Civil Dialog Group

Dried fodder

2 June 2017



European
Commission

CONTENT

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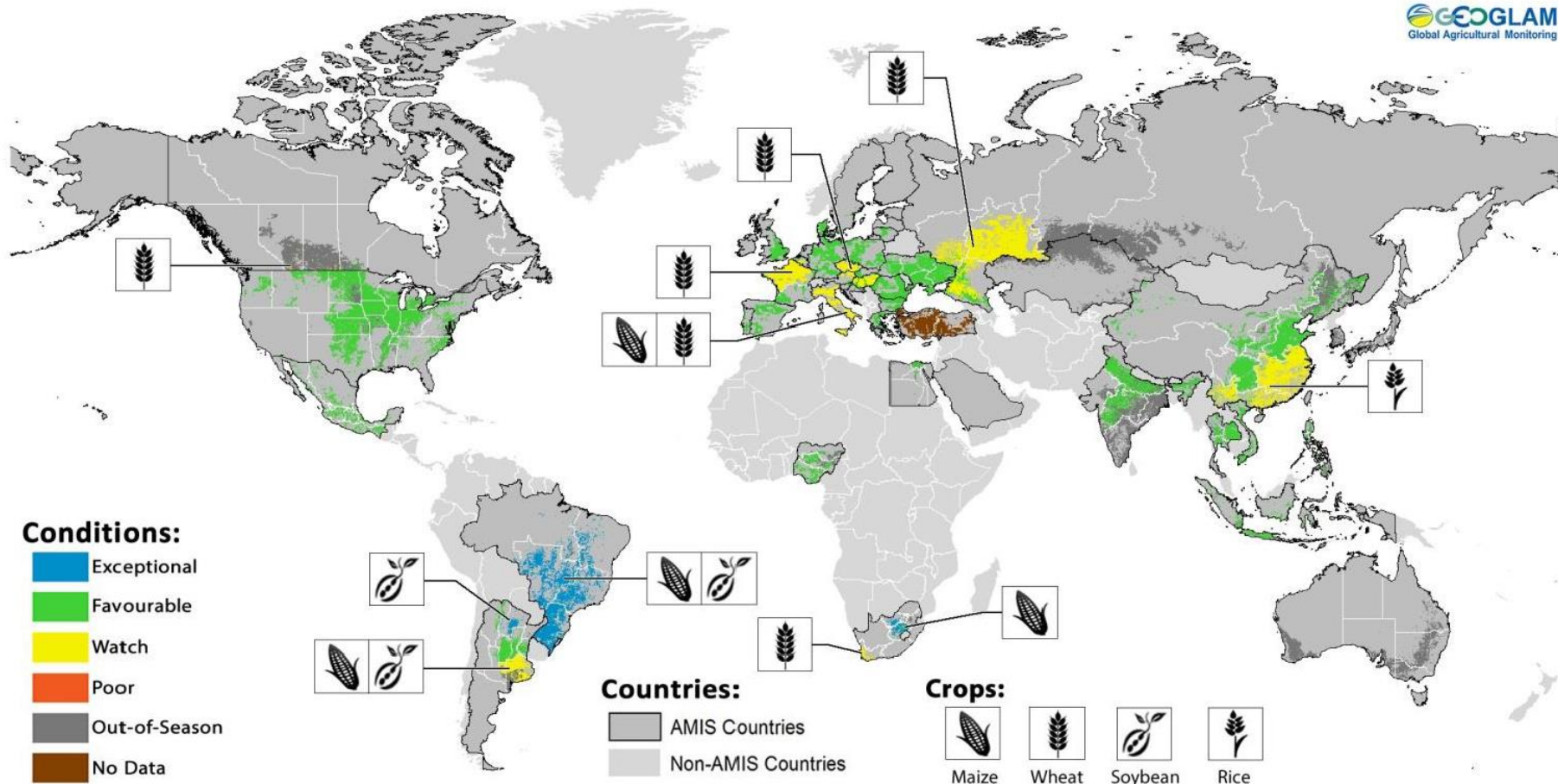
1. Agro & Weather



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GLOBAL

GOGLAM
Global Agricultural Monitoring





Key messages

Wheat

Mixed weather conditions in the northern hemisphere : slow down of spring sowings and winter crop development (Canada)

Good weather conditions in the southern hemisphere for wheat planting (Brazil, Argentina)

Maize

Overall conditions in the southern hemisphere are favourable to exceptional with very good production prospects (harvest in Brazil and Argentina)

Maize sowings progress in the northern hemisphere under generally favourable conditions: sowings completed at 96% in France (88%), 83% in Russia and 95 % in Ukraine.

Oilseeds

The soybeans harvest is done in good conditions in the southern hemisphere (Brazil 95%; Argentina 75%).

In the northern hemisphere, planting is difficult in Canada and partly in the US corn belt; Sowings in Ukraine complete 90% (88% y/y)

EU 28: areas of concern

AREAS OF CONCERN - EXTREME WEATHER EVENTS

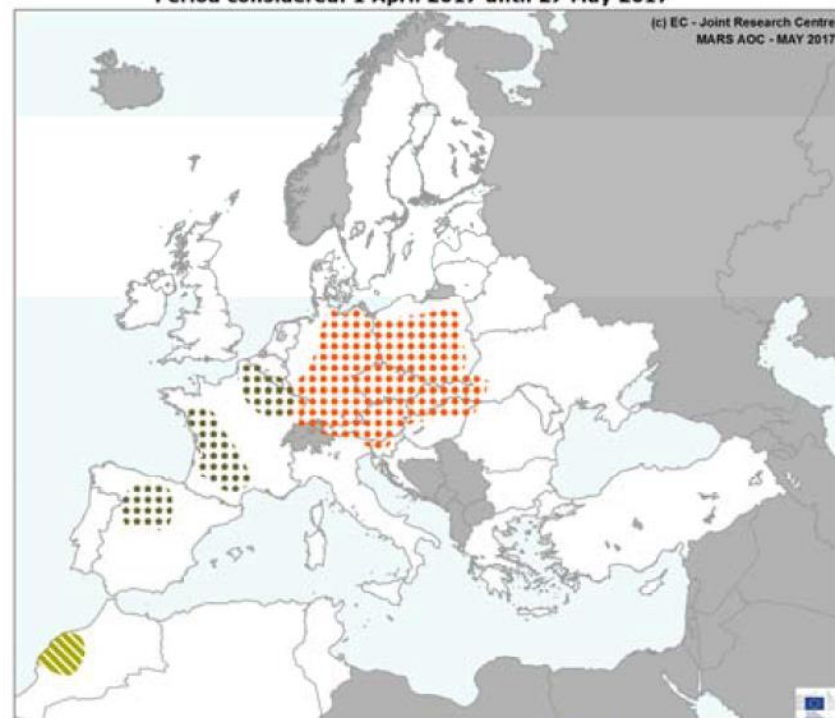
Based on weather data from 1 April until 27 May 2017






 Rain deficit  Cold spell  Hot and Dry

AREAS OF CONCERN - WINTER CROPS

Period considered: 1 April 2017 until 27 May 2017



 Flowering impacted  Growth impacted  Storage organs impacted



EU 28 (01 April to 27 May)

Spain: persistent dry conditions; vegetative growth impacted in Castilla y Leon (barley).

Italy: dry conditions in southern regions no serious impact on durum wheat (grain-filling phase).

France: in western regions, durum wheat suffered from a persistent lack of precipitation, while winter barley and soft wheat were hampered by persistent low soil moisture and cold conditions in northern regions.

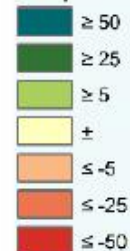
Low minimum temperatures affected rapeseed flowering in **Germany**, central Europe (**the Czech Republic, Slovakia, Austria, Hungary, Slovenia**) and **Poland**. Delays in maize sowings in Germany and Poland.

EU 28 pastures

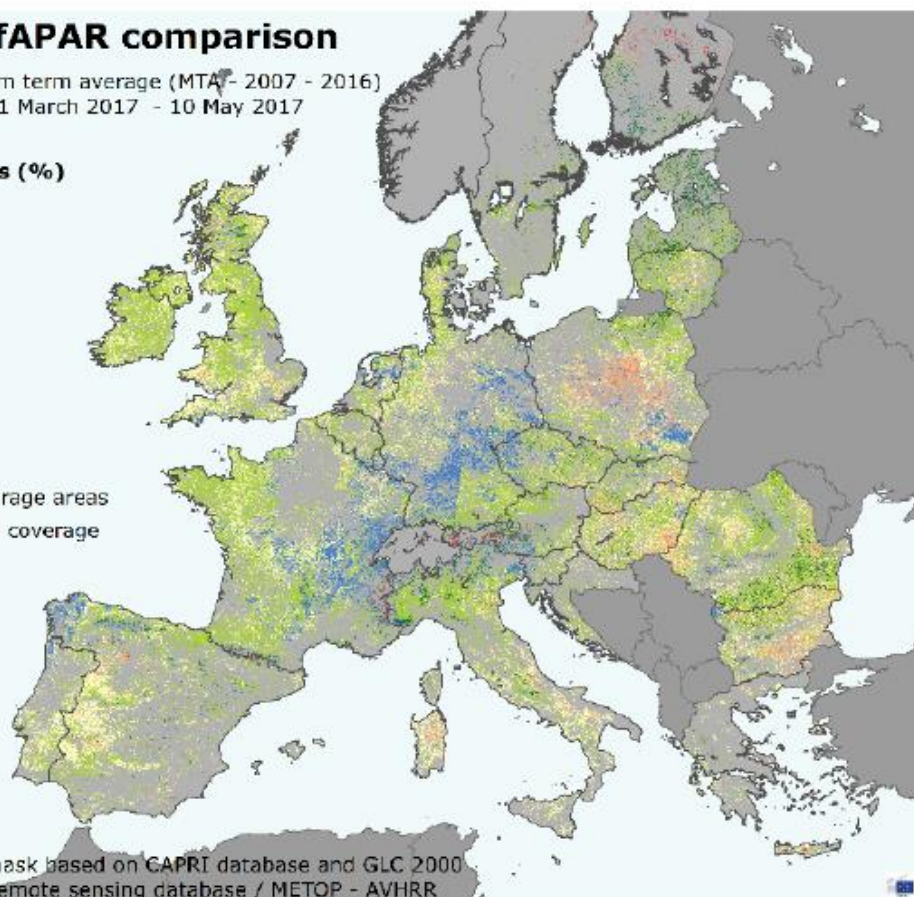
Cumulated fAPAR comparison

Current year - Medium term average (MTA - 2007 - 2016)
Considered period: 01 March 2017 - 10 May 2017

Relative differences (%) compared to MTA



Grey: No pasture / forage areas
Blue: Relevant cloud coverage (1 - 10 May)

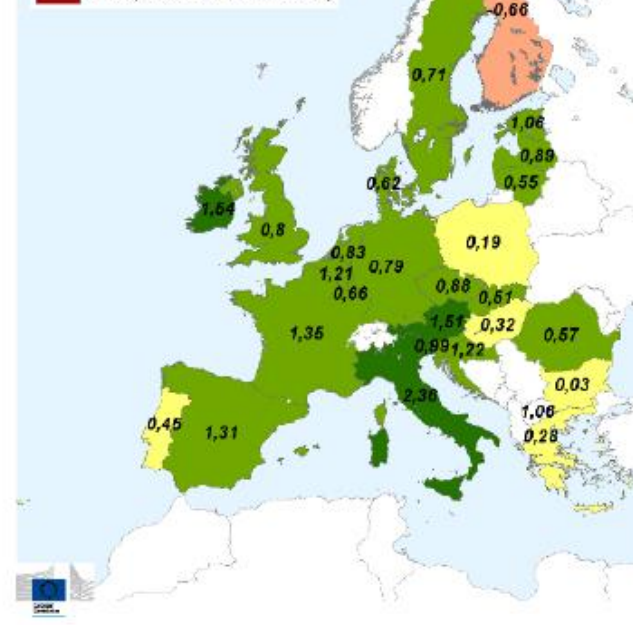
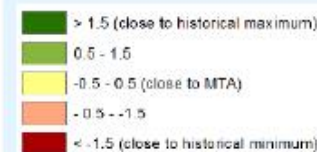


Pasture and forage mask based on CAPRI database and GLC 2000
Data source: MARS remote sensing database / METOP - AVHRR

Relative index of pasture productivity

Period of analysis: 1st March - 10 May 2017

Index based on METOP-AVHRR smoothed fAPAR 10-day product.
Historical archive (MTA) from 2008 to 2017





2. EU Cereals

	Cereals balance sheet:Marketing year: 2016/2017										Million tonnes EUR 28
<i>mai-17</i>	Common										
	wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others		
Beginning stocks (01.07.2016)	14,7	7,6	2,8	12,3	1,0	0,2	1,6	2,3	3,0		45,5
Usable production	134,4	59,6	9,2	60,6	7,3	0,6	8,0	11,5	3,5		294,6
Import	3,3	0,4	1,8	11,7	0,0	0,1	0,0	0,0	0,2		17,6
TOTAL AVAILABILITIES	152,4	67,6	13,7	84,6	8,3	1,0	9,6	13,8	6,6		357,6
USE											
- Human	47,8	0,4	8,0	4,8	3,0	0,2	1,1	0,1	0,0		65,4
- Seed	5,0	2,2	0,5	0,4	0,4	0,0	0,4	0,6	0,1		9,6
- Industrial	10,5	9,0	0,1	11,5	1,6	0,0	0,1	0,4	0,1		33,4
of which alcohol											13,8
o.w. bioethanol/biofuel	4,5	0,4		6,0	0,9			0,3			12,2
- Animal feed	52,4	42,3	0,5	53,5	2,3	0,7	7,5	11,0	4,5		174,7
TOTAL USE	115,7	53,9	9,1	70,2	7,4	0,9	9,2	12,1	4,7		283,1
Losses (excl on-farm)	0,9	0,4	0,1	0,6	0,1	0,0	0,1	0,1	0,0		2,2
Solde disponible	35,7	13,3	4,6	13,8	0,9	0,1	0,3	1,7	1,9		72,3
Export	24,0	7,7	1,4	2,5	0,1	0,0	0,2	0,0	0,0		35,8
Ending stocks (30.04.2017)	44,9	20,5	5,0	25,9	2,6	0,2	2,7	4,7	3,0		109,6
Ending stocks (30.06.2017)	11,7	5,6	3,2	11,3	0,8	0,1	0,2	1,7	1,9		36,4



EU BALANCE SHEET 2016/17

- Harvest below average:
 - Disappointing soft wheat yields in Western Europe
 - Partially offset by increases in Southern and Eastern Europe
 - Mixed quality results for soft wheat (specific weight and grain size)
 - Short Maize harvest (slightly higher than 2015/2016)
- Decrease of total exports
 - Steep fall in soft wheat and barley exports
- Second Decrease in a row of total ending stocks

EU 28- 2017 Area Forecast

EU EVOL CEREALS AREA					
Million ha	2015	2016	2017 April fcst	2017 May fcst	% change 2016/2017
TOTAL	57,3	56,9	56,8	56,9	0,0
Soft wheat	24,3	24,3	23,6	23,9	-1,8
Durum wheat	2,5	2,7	2,6	2,6	-2,5
Barley	12,2	12,3	12,5	12,4	0,5
Maize	9,2	8,6	9,3	9,0	4,8
Rye	2,0	1,9	2,1	2,1	9,7
Oats	2,5	2,6	2,6	2,7	2,4

Sources : DG AGRI - G4

EU 28- 2017 Production Forecasts

EU EVOL CEREALS USABLE PRODUCTION					
Million tonnes	2015/2016	2016/2017	2017/2018 April fcst	2017/2018 May fcst	%change 2016/2017
TOTAL	311,5	294,6	311,8	304,8	3,5
Soft wheat	151,3	134,4	141,9	141,3	5,1
Durum wheat	8,3	9,2	8,9	8,8	-4,3
Barley	61,4	59,6	62,4	59,5	-0,2
Maize	59,0	60,6	66,5	64,2	5,9
Rye	7,6	7,3	8,2	7,4	1,4
Oats	7,5	8,0	8,3	8,2	2,5

Sources : DG AGRI - G4

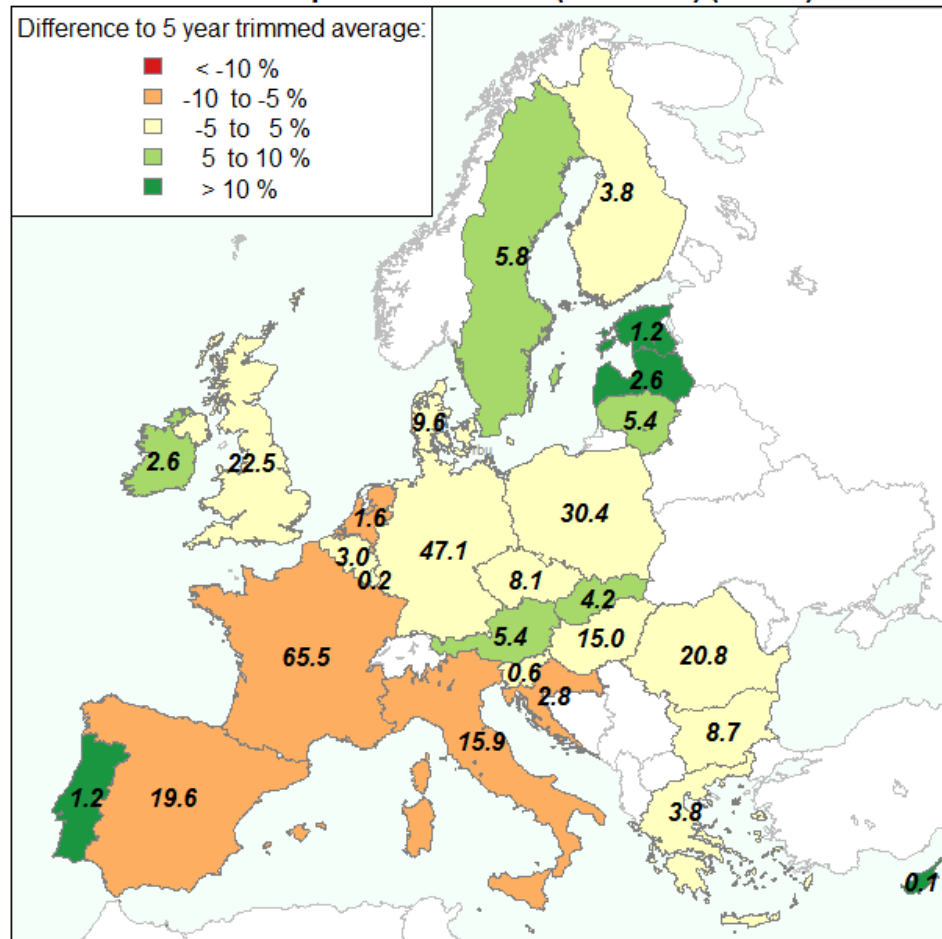
EU 28 - 2017 Production Forecast

Most important producers
(80% of EU production)
total cereals prod changes 2016/2017

FR	20,5%
DE	4,1%
PL	1,1%
IT	-3,8%
UK	2,3%
ES	-16,2%
HU	-10,5%
RO	4,6%

Sources : DG AGRI - G4

All cereals production 2017 (million t) (f'cast.)



EU28 production : 304.8 (million t) Difference to 5 year trimmed average: 0 %

Cereals balance sheet:Marketing year: 2017/2018										Million tonnes EUR 28
<u>May-17</u>	Common									
	wheat	Barley	Durum	Maize	Rye	Sorghum	Oats	Triticale	Others	
Beginning stocks (01.07.2017)	11,7	5,6	3,2	11,3	0,8	0,1	0,2	1,7	1,9	36,4
Usable production	141,3	59,5	8,8	64,2	7,4	0,7	8,2	11,0	3,7	304,8
Import	3,3	0,4	1,7	12,0	0,1	0,1	0,0	0,0	0,2	17,8
TOTAL AVAILABILITIES	156,4	65,5	13,7	87,4	8,3	0,9	8,4	12,7	5,8	359,0
USE										
- Human	48,0	0,4	8,0	4,9	3,1	0,2	1,1	0,1	0,0	65,7
- Seed	4,8	2,2	0,5	0,5	0,4	0,0	0,4	0,5	0,1	9,5
- Industrial	10,8	9,1	0,1	11,9	1,7	0,0	0,1	0,4	0,1	34,2
of which alcohol										14,5
o.w. bioethanol/biofuel	4,7	0,4		6,5	1,0			0,3		12,9
- Animal feed	51,5	41,1	0,5	56,8	2,8	0,7	6,2	11,0	4,5	175,1
TOTAL USE	115,2	52,7	9,1	74,1	8,0	0,9	7,9	12,0	4,7	284,5
Losses (excl on-farm)	0,9	0,4	0,1	0,6	0,1	0,0	0,1	0,1	0,0	2,2
Solde disponible	40,3	12,4	4,5	12,8	0,2	0,0	0,4	0,6	1,0	72,3
Export	28,9	7,0	1,4	2,7	0,2	0,0	0,2	0,0	0,0	40,3
Ending stocks (30.06.2018)	11,4	5,4	3,1	10,2	0,1	0,0	0,2	0,6	1,0	32,0



EU BALANCE SHEET 2017/18

- Average Production based on:
 - Stable area vs 2016/17
 - Yields higher vs 2016/17 with however, spring barley affected in Spain (drought)
- Expected recovery of total exports vs 2016/17
 - Namely in soft wheat
- Third decrease in a row of total ending stocks



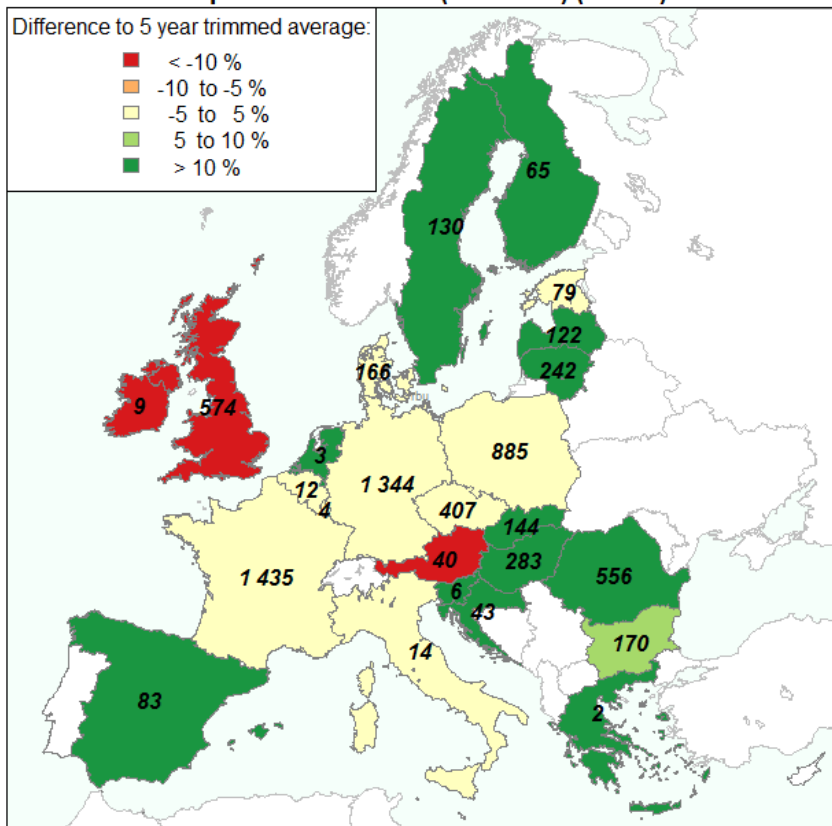
3. EU Oilseeds



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EU Rapeseed

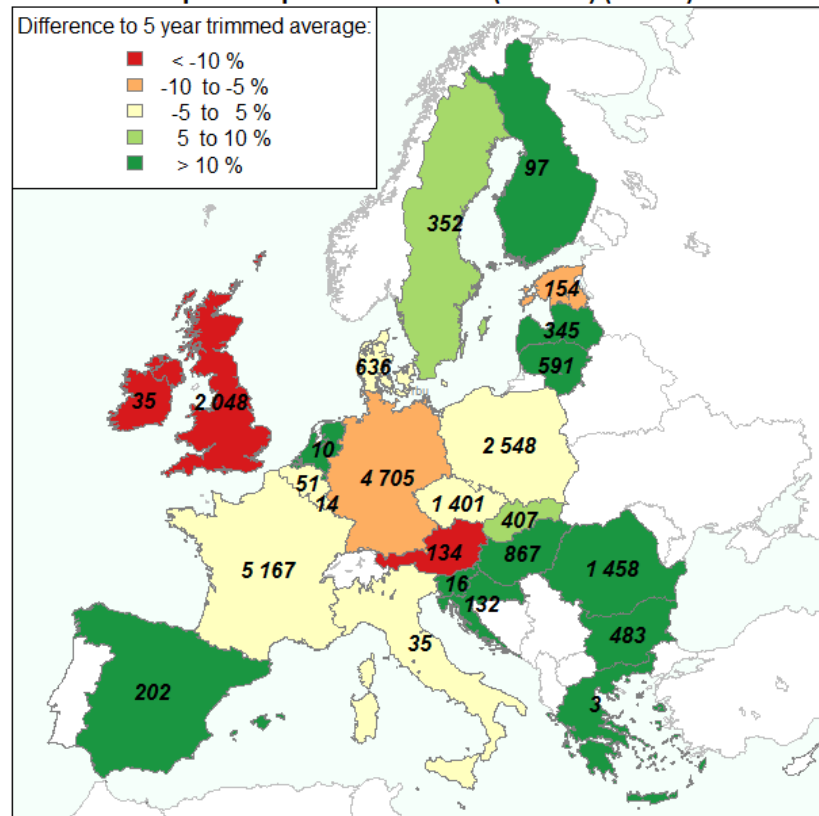
Rapeseed area 2017 (1000 ha) (f'cast.)



EU28 area : 6 818 (1000 ha) Difference to 5 year trimmed average: 4 %

Calculations and cartography: European Commission DG AGRI G4 2017-05-23 © EuroGeographics for the administrative boundaries

Rapeseed production 2017 (1000 t) (f'cast.)



EU28 production : 21 890 (1000 t) Difference to 5 year trimmed average: 5 %

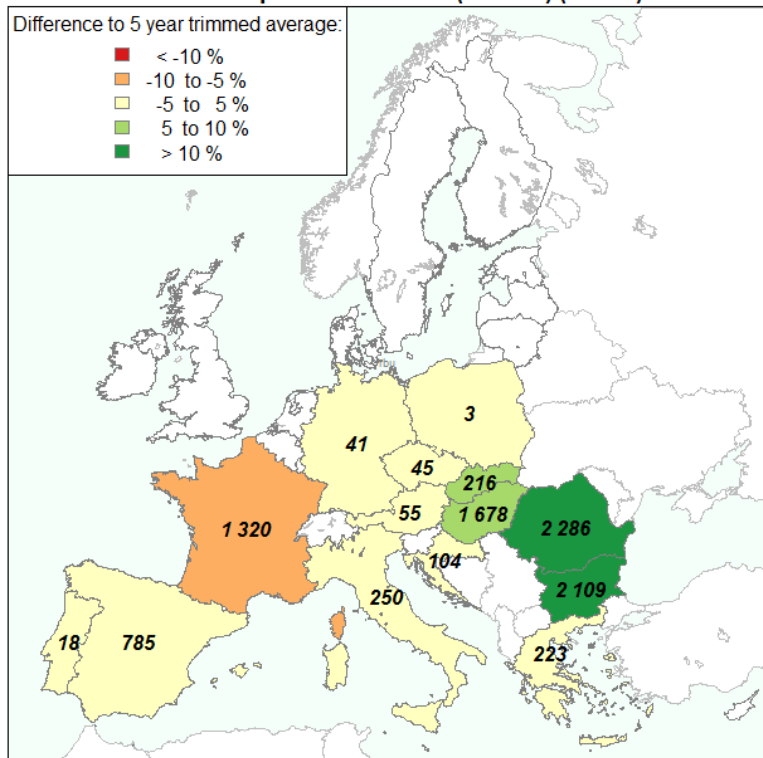
Calculations and cartography: European Commission DG AGRI G4 2017-05-23 © EuroGeographics for the administrative boundaries



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EU Sunflower & Soybeans

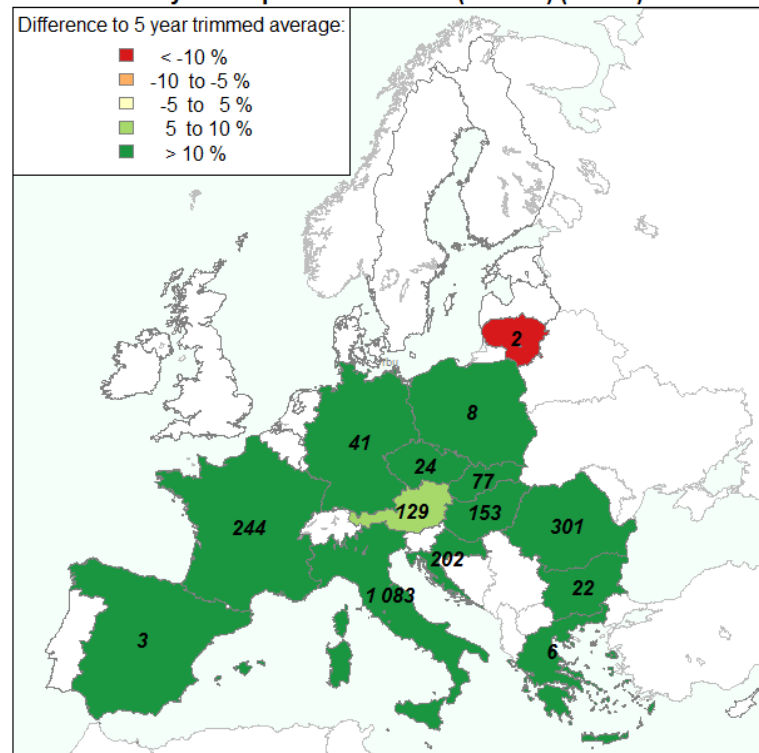
Sunflower production 2017 (1000 t) (f'cast.)



EU28 production : 9 133 (1000 t) Difference to 5 year trimmed average: 6 %

Calculations and cartography: European Commission DG AGRI G4 2017-05-23 © EuroGeographics for the administrative boundaries

Soybeans production 2017 (1000 t) (f'cast.)



EU28 production : 2 295 (1000 t) Difference to 5 year trimmed average: 32 %

Calculations and cartography: European Commission DG AGRI G4 2017-05-23 © EuroGeographics for the administrative boundaries

EU Oilseeds

EU OILSEEDS AREA

Million ha	AVG 5 yrs trimmed	2016/17	2017/18 April 2017	2017/18 May 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	6.6	6.5	6.7	6.8	4.1	3.7
Sunflower	4.3	4.2	4.3	4.3	2.9	0.5
Soja	0.6	0.8	0.8	0.8	0.0	33.4
Linseed	0.1	0.1	0.1	0.1	-18.2	-2.9
TOTAL	11.5	11.6	11.9	12.0	3.2	4.1

Sources : DG AGRI G.4

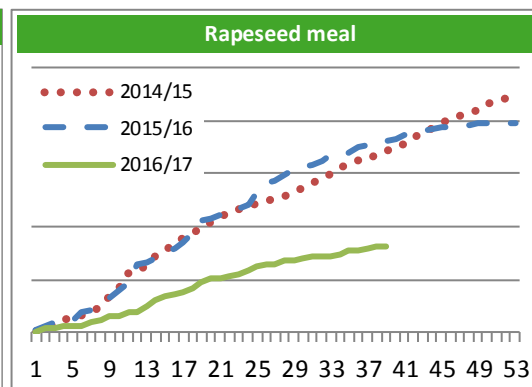
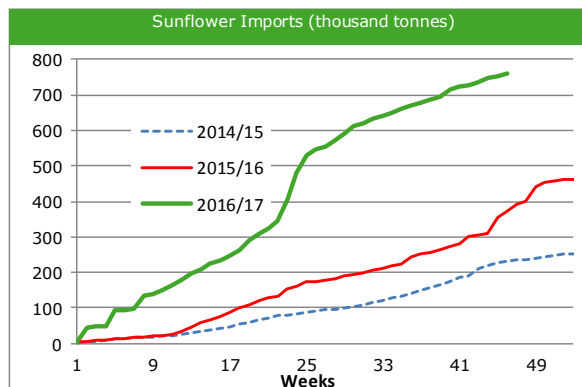
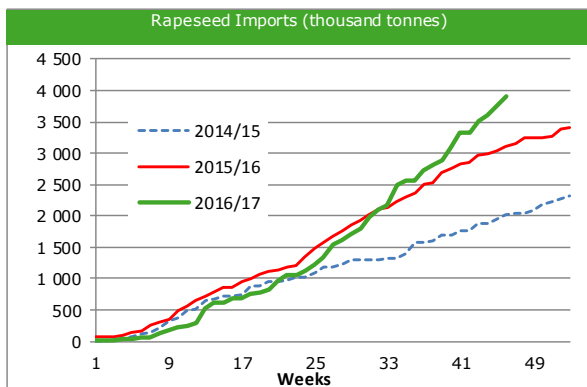
EU OILSEEDS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 April 2017	2017/18 May 2017	%change 2016/17	%change 5yrs trimmed
Rapeseed	20.8	19.7	22.2	21.9	11.2	5.1
Sunflower	8.6	8.6	9.1	9.1	6.5	6.5
Soja	1.7	2.2	2.4	2.3	6.7	32.4
Linseed	0.1	0.1	0.1	0.1	-5.3	-1.4
TOTAL	31.3	30.6	33.9	33.5	9.5	7.0

Sources : DG AGRI G.4

EU oilseeds trade (2016/17)

Cumulated Imports (thousand tonnes) up to week 46	2016/17	Difference (%) with		Main origin of imports	share (%) in total import
		2015/16	2014/15		
soybeans	12 072.1	▼ -2%	▲ 7%	United States of America	40.4%
rapeseed	3 909.8	▲ 26%	▲ 93%	Australia	59.3%
sunflowerseed	759.4	▲ 105%	▲ 230%	Moldova, Republic of	37.7%
soymeal	15 472.5	▼ -12%	▼ -4%	Argentina	46.6%
rapemeal	167.6	▼ -57%	▼ -58%	Russian Federation	50.5%
sunmeal	3 019.0	▲ 10%	▲ 4%	Ukraine	68.3%
soyoil	238.6	▼ -13%	▲ 3%	Norway	25.5%
rapeoil	142.4	▼ -26%	▼ -38%	Ukraine	45.8%
sunoil	1 233.8	▼ -7%	▲ 46%	Ukraine	90.7%
palm oil	5 123.6	▼ -14%	▼ -7%	Indonesia	50.8%





Key messages - oilseeds

EU oilseeds

2017/18 area at 12m ha (+3.2% vs last MY; 4.1% vs 5 yrs average) with increase for rapeseed, sunflower and soybeans.

2017/18 production revised down (m/m) at 33.5m t (+9.5%; 7%) due to a decrease for rapeseed (lower yield).

Rapeseed

Decrease (y/y) of area : FR, UK

Increase of area: DE, PL, CZ, RO

Balance sheet

Increase of sunflower and rapeseed imports

Decrease of soymeals imports



4. EU Proteins

EU Protein crops

EU PROTEIN CROPS AREA

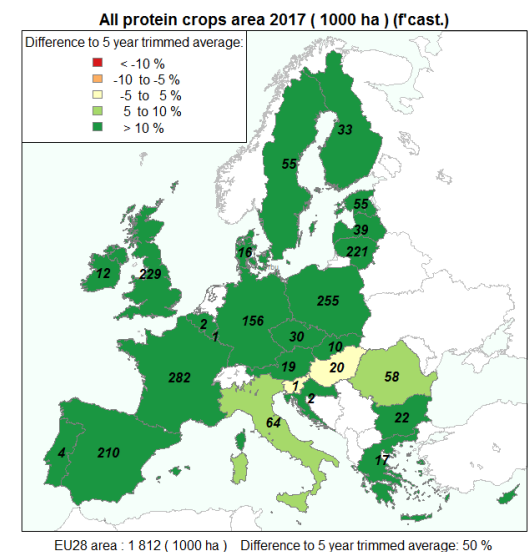
Million ha	AVG 5 yrs trimmed	2016/17	2017/18 April 2017	2017/18 May 2017	%change 2016/17	%change 5yrs trimmed
Field peas	0.6	0.9	0.9	0.9	-0.6	50.6
Broad beans	0.5	0.7	0.7	0.7	0.0	42.8
Sweet lupins	0.2	0.3	0.3	0.3	-0.3	64.2
TOTAL	1.2	1.8	1.8	1.8	-0.3	49.4

Sources : DG AGRI G.4

EU PROTEIN CROPS PRODUCTION

Million tonnes	AVG 5 yrs trimmed	2016/17	2017/18 April 2017	2017/18 May 2017	%change 2016/17	%change 5yrs trimmed
Field peas	1.6	2.3	2.5	2.5	7.4	56.4
Broad beans	1.4	1.9	2.0	2.0	5.4	45.3
Sweet lupins	0.2	0.4	0.4	0.4	9.4	67.9
TOTAL	3.2	4.6	4.9	4.9	6.8	52.5

Sources : DG AGRI G.4





Thank you for your attention!

Presentation available at:

http://ec.europa.eu/agriculture/cereals/index_en.htm